COMPLETE SELF-EVALUATION

Use this job aid to complete your self-evaluation as part of the annual performance review process. The self-evaluation is completed prior to the annual review.

To learn more, find job aids and videos at http://workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website.
Performance: Complete Self-Evaluation

Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

Self-Evaluation

The self-evaluation is the first step in the annual performance review process. It provides a way for the colleague to give their input into their evaluation. It is the colleague’s responsibility to complete it. The self-evaluation is optional, however, colleagues should not skip this part of the annual performance review process unless the decision to do so has been discussed with the colleague’s manager.

- The self-evaluation will be in the colleague’s Workday Inbox May 15 and should be completed by 11:59 PM EST, June 15.
- Colleagues will not have the opportunity to complete the self-evaluation after June 16 because it will disappear from the Workday inbox; and they will not be able to provide input on their annual performance review.
- However, the colleague’s manager may choose to send the review back to the colleague to complete the self-evaluation step prior to the manager completing the review.

☐ Complete the self-evaluation: Colleague
☐ Review colleague’s self-evaluation: Manager

NOTE: Colleagues should not skip the self-evaluation step unless decided upon with their manager.
**Performance: Complete Self-Evaluation**

1. Log into Workday
2. Click the **Inbox**

3. Look for the **Self Evaluation Annual Performance Review** inbox item

**NOTES:**
- Executives will see the Executive Annual Performance Review
- Leaders will see the Leader Annual Performance Review
- Colleagues (non-leaders) will see the Staff Annual Performance Review.
Performance: Complete Self-Evaluation

NOTE: Best practice is for colleagues to complete their self-review to share their own perspectives with their manager. Click Skip This Task only if your manager has given you instructions to do so, which advances the review to the Manager Evaluation step.

NOTE: Click OK (the next screen will come up) If you click CANCEL the task will remain in the inbox.
4. To complete the **Self-Evaluation**, click **Go to Guided Editor**

or **Click Go to Summary Editor** to scroll through the entire Summary page.
Performance: Complete Self-Evaluation

Now you will begin to assess your Goals, Core Values, Role Specific Job Duties, and add Supporting Documents (if applicable)

5. Click on the Goals and criteria to review and update the goal status:
   - Click Weighting to change the weight of a Goal
   - Type the new weight
   - Click the checkmark to accept the change

6. View, add and or edit Milestones

IMPORTANT: See the Appendix for instructions on how to pull Goals into the review.
7. Click the drop-down-arrow in the **Rating** field to select your rating for each Goal.

8. Type a **Comment**

9. Click **Next** to assess your next goal

---

**Employee Evaluation**

- **Rating**
  - Fully Meets

**Colleague** consistently performs at a proficient level, achieving and sometimes exceeding expectations, making positive contributions. Works independently without review of individual pieces, however final product or performance may or may not be reviewed. Recognized as a mentor, role model and resource to colleague, often advising others. Demonstrates initiative and independence. Engages in problem solving. Continues to refine skills and learn from new experiences. Displays the ability to improve the process by offering expertise/knowledge.

**Comment**

I consistently perform at a proficient level on all of my projects and for deliverables for which I am responsible.

---

**NOTE**: The definition for each rating will appear after you select a rating for the Goal.
10. Review **Core Values** statement.

11. Scroll down to the **Rating** area. Under **Rating**, click the drop down arrow to select the **Rating** that indicates how often you displayed the **Core Values**. Under the **Comment** field, type a **Comment** for the **Core Values** (optional).

12. Click **Next**.
14. For **Role Specific Job Duties**, select a **Rating** on performance of your job duties.

15. In the **Comment** field, type a **Comment** (optional) on your performance of job duties.

16. Click **Next**
Performance: Complete Self-Evaluation

17. To attach a document, click Add and click Attach, follow the remaining steps – this is optional and is helpful if there are specific documents that support your self-review.

18. Click Next
19. Click Submit when you have completed your self-evaluation

**NOTE:**
When you click Submit, if you have not rated yourself on any goal or provided comments, or if the weight of your goals do not total 100, you will receive an error message. Click the X on the Error message to clear it, and add the missing information.
**End of Process: Next Steps**

- Manager receives a Workday Inbox task to review and complete colleague evaluation.
- Manager and Colleague have a face to face annual performance evaluation meeting.
- Manager signs off on the Annual Review Acknowledgment.
- Colleague signs off on the Annual Review Acknowledgement.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

1. When you begin completing the self-evaluation and need to add Goals at this time, click **Add**.

2. To pull in an existing Goal, click **Use Existing Goal**.

**NOTE:**
If a Goal is not showing in the self-evaluation review, or you want to add one or more Goals, follow these steps.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

3. Select a People-Centered 2020 Goal Category

**NOTE:**
It is important to know the People-Centered 2020 Category connected to a cascaded Goal. If this is not known, click on each category until the Goal appears.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

4. Click the Goal to pull it into the annual review.

See the **Operational Excellence** example.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

5. Type a **Weighting** for the Goal. It may be necessary to re-weight all Goals to total 100%. All Goals must total 100% to successfully submit the annual review.

6. Click **Submit**.

- Click the checkmark icon to accept changes.

---

*Performance: Complete Self-Evaluation*