COMPLETE ANNUAL PERFORMANCE REVIEW

Use this job aid for the Annual Performance Review.

To learn more about Workday, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.
Business Process Steps and Roles

The Talent Administrator role will initiate the annual performance review.

Before You Start

Ensure local policies and procedures are followed. This may include:

- Manager - Discuss and assign goals to colleague, considering both organization goals (if applicable) and goals to support performance
- *Manager and Performance Support Manager discuss and identify the sections of the performance review they will complete
- Colleague - Complete the self-evaluation

*SPECIAL NOTE: Comments are optional in many parts of the annual performance review; however, please note that comments are auditable and therefore should be appropriate.

*Performance review tasks/sections to complete will be available to both the manager and support manager via their Workday inbox. If a task in the inbox is started by one reviewer, it will automatically be removed from the inbox of the person who did not start it.
## Annual Performance Review Process Steps

The steps conducted by the **Manager** and **Performance Support Manager** are listed below.

<table>
<thead>
<tr>
<th>Role</th>
<th>Process Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Talent Administrator</td>
<td>☐ Launch annual performance review</td>
</tr>
<tr>
<td>☐ Colleague</td>
<td>☐ Complete self-evaluation</td>
</tr>
<tr>
<td>☐ Manager/Performance Support Manager</td>
<td>☐ Complete the manager evaluation</td>
</tr>
<tr>
<td>☐ HR Partner/Colleague Relations Partner</td>
<td>☐ Approve annual performance review (only if a colleague receives a “Does Not Meet” rating)</td>
</tr>
<tr>
<td>☐ Manager/Performance Support Manager</td>
<td>☐ Meet with colleague to discuss annual performance review</td>
</tr>
<tr>
<td>☐ Manager/Performance Support Manager</td>
<td>☐ Annual performance review acknowledgement (signoff)</td>
</tr>
<tr>
<td>☐ Colleague</td>
<td>☐ Annual performance review acknowledgement (signoff)</td>
</tr>
<tr>
<td>☐ End of Process</td>
<td></td>
</tr>
</tbody>
</table>
1. Log in to Workday
2. Click Inbox

3. Find the notification and click to open

4. You can walk through the evaluation with each step on a separate screen (Go to Guided Editor) OR show all evaluation steps on a single screen (Go to Summary Editor); click your choice

NOTE: This job aid provides the step-by-step instructions for following Go to Guided Editor.
5. Click the **edit icon** to review the goal, employee rating, and colleague and additional manager (if applicable) comments.

6. Give a rating and type comments under **Manager Evaluation**.

7. Repeat step 6 for each goal.

**IMPORTANT:** If you have cascaded goals after the launch of the annual review and goals are not showing in the performance review, see Appendix B for instructions on how to pull goals into the review.

**NOTE:**
- Ratings are required (an error message will display at the end of the evaluation if skipped)
- Comments are optional (and are auditable and therefore should be appropriate)
8. Review Core Values statement.

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

10. Click Next
Performance: Complete Annual Performance Review

11. Select a rating and type comments on performance related to the colleague’s Role Specific Job Duties.

12. Click Next.
13. On the Supporting Documents page, review any Employee attachment(s)

14. Click Add under Manager to add an attachment(s) (optional)

15. Click Next
16. The Overall page displays the rating and calculated rating for the entire performance review. **Note:** you will be able to provide comments at the acknowledgment section.

17. Click **Next**.
18. Review the page; click the **edit icon** next to anything you want to change or update.

**NOTE:** Once you click **Submit**, you are no longer able to edit any ratings. The next step is the manager acknowledgement. It is recommended that you click **submit** after you meet with your colleague (in case you have edits to make) to communicate his/her final review rating.

19. Click **Submit**

20. Process moves to **Provide Manager Review Comments** (Acknowledgement); click **Open**

**NOTE:** For instructions on how the manager can send the colleague evaluation back to themselves after they have submitted it, refer to **Appendix C**.
Important Note:

If the colleague’s overall performance review rating is **Does Not Meet**, after you submit the annual performance review, the next step in the process is your HR Partner/Colleague Relations Partner review and approval.
Performance: Complete Annual Performance Review

HR Partner/Colleague Relations Partner will receive an Outlook email stating there is a Workday inbox item waiting for approval (regarding a **Does Not Meet** performance review rating for a colleague.

1. Log in to Workday
2. Click **Inbox**
3. Walk through the evaluation to review each section (**Go to Guided Editor** to see each page OR **Go to Summary Editor** to show all evaluation sections on a single screen); click on your choice
You can Approve, Send Back or Add Approvers (optional)
4. Click **Approve**

The next step is the **Provide Manager Review Comments** (Acknowledgement).

5. Click **Done**
1. Log into Workday
2. Click the Inbox
3. Find the Manager Evaluation on the colleague to Provide Manager Review Comments (Acknowledgement) and click to open it
4. Read the Acknowledgement
5. Select to Acknowledge with or Acknowledge Without Comments
6. Click Submit
6. Click Done
End of Process: Next Steps

WHEN YOU HAVE COMPLETED THE PERFORMANCE REVIEW:

- Manager and colleague review the annual performance review together
- Manager acknowledgement the annual performance review
- Colleague acknowledgement of the annual performance review
- Annual Review Process Successfully Completed!
You can view your team’s performance information from your Team Performance worklet (see below).

If you do not see the Team Performance worklet, click the gear icon in the upper right blue bar and then add it (plus icon) from the Optional Worklets column.

**GOALS**
View goals by employee (colleague) or by goal

**GOALS I’VE ASSIGNED**
View goals you’ve assigned

**ORGANIZATION GOAL ALIGNMENT**
View organizational goals

**EMPLOYEE REVIEWS**
View reviews by review period

**MY TEAM’S PERFORMANCE REVIEWS**
View reviews by team member that are In Progress or Complete

**FEEDBACK**
View feedback for your team members

**PRINTABLE REVIEW**
Print a review for a team member

**REVIEW SUMMARY**
View summary of employee reviews by organization, review period, and rating category

**DEVELOPMENT ITEMS**
View development items assigned to your team members
Team Performance Worklet

**PRINTABLE REVIEW**
Print an annual performance review for a team member

To print the annual performance review:
- Click Printable Review
- Type colleague’s name (or select it from the drop-down list) and click your enter key
- Select the Annual Performance Review
- Click OK
- Click the printer icon in the top right corner of the window
To review feedback on a colleague:

1. Log into Workday and click the My Team worklet
2. Scroll down the page; find the colleague for which you want to review feedback
3. Click the Action button

Click the Actions button

Mary Peters (3001234)
Daniel West (3010101)
4. In the Actions column, click Talent; then click View Feedback.
Pulling Goals into the Annual Performance Review

1. When you begin reviewing the annual performance and need to add goals at this time, click Add.

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

NOTE: If goals are not showing in the annual performance review, the manager (or colleague) will need to pull them into the review.
Performance: Complete Annual Performance Review

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 the manager has connected to the cascaded goal. If this is not known, click on each category until the goal appears.
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)
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 be able to successfully submit the annual review)
Manager Send Back Review After Submitted

**Process Steps**

1. From your (manager) Home Page, click on the Team Performance worklet
Manager Send Back Review After Submitted

Process Steps

2. Scroll down the **Actions** and click on **My Team’s Performance Reviews**.
Manager Send Back Review After Submitted

**Process Steps**

3. Select from either the **Performance Reviews** tab or the **Additional Manager Evaluations** tab. Select the colleague review you want to send back to yourself.

4. Click **Send Back** so the review will go back to your (manager) inbox.