Workday Job Aid for Managers

Introductory Review

Use this job aid to complete an introductory review for a colleague who is new to Trinity Health and reports to you. To be able to begin, Workday will automatically trigger this review.

This process falls outside of the Performance Management Process.

Complete the Introductory Review

- Review and rate the performance categories
- Write comments regarding the colleague’s performance
- Review colleagues comments
- Submit the review to HR
- If review rating is partially meets or does not meet, HR is notified to approve, send back, add approvers or close the review
- The manager and colleague will receive notification from HR

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 — Introductory Review

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

**Introductory Review**

As a manager, you are responsible for completing an introductory review for a colleague that is new to Trinity Health.

- **Initiates the process** Workday System
- **Completes and send review to colleague**: Manager
- **Review and acknowledges manager review and comments**: Colleague
- **Review, approve, send back, add comments or close the Introductory Review**: HR Partner/Colleague Relations Partner (if review is Does Not Meet or Partially Meet)

**ROLE:**

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<th>Role</th>
<th>Manager</th>
<th>Colleague/New Hire</th>
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<tr>
<td>Workday initiates the review process</td>
<td>Completes Review</td>
<td>Sends review to colleague</td>
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<tr>
<td>Completes Review</td>
<td>Receives and acknowledges review</td>
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<tr>
<td>Review colleague’s comments</td>
<td>Receives review</td>
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<td>Approve</td>
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**NOTES:**

If manager rates a review as “does not meet” or “partially meets”, HR Partner will receive, approve, send back, add comments or close the review. The manager and colleague will receive notification in their Inbox.
**Before You Start**

- It’s important to note that Workday will send you an Inbox notification.
- Begin the Introductory Review process by clicking your Inbox.

**Notifications**
(a colleague or department should be notified outside of the Workday system)
- None.

**Variations**
- This process may vary by Health Ministry. There should be no variations to the Workday process across the system.

**Other Resources**
- Contact your HR Partner or Talent Management Department
Introductory Review

**Process Steps**

Which role(s) can do this step?
- Manager

1. Log in to Workday
2. Click Inbox
3. Click the **Introductory Review** area in your **Inbox**

4. Click **Go to Guided Editor**

**NOTES:**
- **Alerts: 1** indicates that sections of the review are hidden from colleagues. The **Performance Review Ratings** will display. Click the X to close the rating.
Provide comments and rate each area of performance for the employee

**Statement**

Role Specific Accountabilities of the Job Description: Employee performs the essential functions and demonstrates the required knowledge, skills, and other duties as assigned.

**Manager Evaluation**

**Acknowledgement**

- select one
- Does Not Meet
- Partially Meets
- Fully Meets
- Exceeds

**Comment**

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5. Click in each performance area and read the performance **Statement**
6. Select one **Acknowledgement**
7. Type your comment
8. Click **Next** to upload and attach supporting documents, if applicable.

**NOTE:**
Performance areas are:
- Role specific Accountabilities of the Job Description
- Core Values
- Quality of Work
- Timeliness & Responsiveness
- Attendance & Punctuality (for non-exempt employee)
- Overall
9. To attach a document click **Add** (follow the process)

10. Click **Attach** to upload the document

11. When the document is attached, click **Next**
Introductory Review

Select one Overall rating

12. Write a Comment

NOTE: Before you click Submit, you will be able to review and edit each performance section by clicking the edit icon (pencil) or by clicking in the section you want to edit.

NOTE:
If manager rates the Introductory Review as does not meet or partially meets:
- HR Partner will review, approve, send back, add comments or close it.

When done
Next steps:
The colleague will:
- Receive an Inbox notification
- Acknowledge the Introductory Review
- Submit the review to manager

13. Click Submit after rating each performance area or click Save for Later, or Close
14. Click Done
REVIEW THE INTRODUCTORY REVIEW ACKNOWLEDGEMENT FROM THE COLLEAGUE

1. Log in to Workday
2. Click Inbox
3. Click the Introductory Review you want to see
4. In the Acknowledgment and Manager Feedback area, click in the Status field and select one of the statements
5. Scroll through and review each Performance Areas

6. Add a comment if needed

7. After you review the Performance Areas, click Submit and click Done
Introductory Review — (Continued)

End of Process

WHEN YOU HAVE REVIEWED AND SUBMITTED THE PERFORMANCE REVIEW:

❖ Meet with your colleague and begin the Performance Management process beginning with goal alignment