

**Penn State Performance Management
Step 3: End-of-Year Review
Frequently Asked Questions for Employees**

Q: How do I begin?

A: To start your End-of Year Review process in Workday, go to your Workday inbox and complete the Get Additional Manager feedback step by either identifying a second manager to provide feedback on your review—or, to skip the task. To skip the task, go to the gear in the upper right hand corner of the task and select “skip this task.” Once you complete the Get Additional Manager task you will receive the Self-Evaluation in your Workday inbox.

Q: Under what circumstances would I ask an Additional Manager for feedback?

A: An employee or manager may choose to invite an additional manager for feedback because the employee has a dual reporting relationship to another manager or the employee changed their role during the current performance management cycle and the previous manager's feedback would be relevant to the performance review.

Q: Who can see my Self-Evaluation?

A: Only you are able to view your responses while the **Self-Evaluation** is in progress. Once you click the **Submit** button your manager will be able to begin your review—and your comments will be visible. At this point, if they wish, appropriate HR team members will be able to view your comments, as well as your manager’s manager and leadership above them in the sup org hierarchy.

Q: How do I print my Self-Evaluation?

A: Click on the print icon in the upper right-hand corner, **at any time** to view a printable version of your self-evaluation. It takes a minute or two for a PDF document to be produced. A message will appear in the upper right-hand corner of the screen once the printable PDF is generated.

Q: If I exit my Self-Evaluation prior to completion, will Workday save my information?

A: Workday automatically saves your information as you move between the response fields. If you need to exit Workday part way through, click on the Save for Later button; when you return you will be prompted to **continue where you left off**.

Q: Can I attach a document to my Self-Evaluation?

A: Yes- there is a section of your self-evaluation that allows you to upload documents.

Q: What do I do if I need to make a change to my Self-Evaluation after I click the Submit button? How can I access it again?

A: After you click **Submit** the Performance Review is now located with your manager. You can ask your manager to send back your review by opening your review, clicking on the **Summary Editor** and clicking **Send Back**. Once your revision is made, click **Submit** again to route it back to your manager. Your manager will not have access to complete your evaluation until you send it back.

Q: By when do I need to complete my Self-Evaluation?

A: Timelines will vary slightly by units/colleges/campuses- so please contact or reference communications generated by your HR team. Workday will automatically push forward any self-evaluations that haven't been submitted by April 16, 2018. If you would like to submit a self-evaluation after that, you may ask your manager to send it back to you.

Q: Where will my Performance Review be stored?

A: One of the advantages of using Workday is your completed performance reviews are easily accessible by you, your manager and HR. Click on the **Performance** worklet on the Workday homepage and then view **Reviews**. Or, you can click on your Workday profile, click on Performance (found in the left-hand menu) and then view **Performance Reviews**.

All of the overall ratings you received from performance review cycles that were completed in the previous online system will also be in stored in Workday in accordance to the official Penn State document retention schedule (current retention schedule is End of fiscal year + 5 years).

Q: Do I have to submit a Self-Evaluation?

A: Yes-- your manager cannot complete your performance review without you submitting your self-evaluation.

Beyond that, completing your self-evaluation gives you the opportunity to share with your manager your accomplishments and the impact they had. Your manager can't possibly know everything you've done over the past performance management cycle that you are proud of—or the progress that you've made on your goals. Did you meet them? Perhaps, you even exceeded them. If you did not meet a goal, explain the reason, the obstacles and the plan to complete it within a specific timeframe

You can also identify areas in which you would like to improve. If you don't tell your manager this, they can't help you continue to grow and succeed within your role.

Your self-evaluation can help your manager complete your performance review as well as serve as a conversation guide for your end-of-year review discussion.

In order to submit your self-evaluation you must at enter your goals and complete the two ethics and compliance statements; however, you are encouraged to share a robust self-evaluation with your manager and complete each section: Goals, Competencies, and Ethics & Compliance statements—and include any final comments with your overall rating.

Q: What happens if my manager is unable to complete my Performance Review?

A: You may reach out to your HR Team to share your concern. They will work to ensure that your performance review is completed on time.