

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

Q. How do Performance Reviews work in Workday?

A: Once your employee has submitted their **Self-Evaluation**, you will receive the first task- **Get Additional Manager Evaluation**. You must complete this task-- by either naming a second manager to offer comments on the review OR skipping this task--in order to get the second task in your Workday inbox- **Complete Manager Evaluation**.

Q: Can I complete the Manager Evaluation for my employee in advance of the employee completing their Self-Evaluation?

A: Employees begin the Performance Review process by completing the **Self-Evaluation** portion of Workday. As such, it will be important to communicate deadlines so you have sufficient time to complete **Evaluations** for your direct reports.

Q: What do I do if I don't have enough information to complete my employee's review because I just recently became their manager?

A: Performance evaluations should be completed by the manager of record in Workday. Depending on the circumstance, it is possible to re-assign the task to another manager by submitting an inquiry in the WorkLion portal. Your request should include the reason why you need to re-assign the task, as well as the employee's name and the name and email address of the manager you would like to re-assign the evaluation to.

An appropriate use of this function would be if your employee just recently changed roles and is still eligible for a performance review OR you recently became the manager. In both circumstances, the previous manager would be the likely choice to complete the review.

Q: What do I do if one of my employees is unable to complete their Self-Evaluation?

A: Please submit a General Inquiry in the WorkLion portal if this situation happens. Workday offers the ability to force a review to the next step, as needed and as appropriate. This process is managed by the WorkLion Talent Management Team. Workday will manually advance all un-submitted self-evaluations mid-April to allow ample time for managers to complete reviews.

Q: How can I send back a self-evaluation to an employee?

A: If an employee needs to make further revisions to their self-evaluation after they submitted it, you can send back their review. Open the employee's evaluation and go to the "**Summary Editor**"- there

you will see a **Send Back** button. Click it and enter the reason why you are sending it back, then click Submit.

Q: I finished the Evaluation step and now I see the Manager Acknowledgment in my Workday Inbox, what do I do?

A: Once you have completed your employee's evaluation, Workday will move to the next step in the process, the **Manager Acknowledgment**. This is the step where you acknowledge that you and your employee have met to discuss their End of Year review and overall rating. Once you click Submit, Workday will route the performance review back to the employee for the next step, the **Employee Acknowledgement**—and your employee will be able to view your ratings and comments, as well as complete the step.

IMPORTANT: Once you complete the Acknowledgment step your employee will be able to view their review in its entirety. Do not complete this step until after you have participated in your unit's calibration process (if applicable) and you have completed the end-of-year conversation with your employee—including delivering the overall rating and making any updates to the review as a result of the conversation.

Q: How do I share my comments with my employee prior to the review meeting?

A: You could print a copy of the review and give it to your employee—or send them a Workday-generated PDF of the review.

Q: My manager has always reviewed my direct reports' reviews before I meet with them. How is this done in Workday?

A: Your manager is still able to view your direct reports' reviews, however, it is not a step in the formal performance review process. Instead, they may generate a report called **Employee Reviews**. Type the name of the report (**Employee Reviews**) in the search box located in the upper left-hand corner:

1. Select the organization by typing in the manager's name.
2. To see all of the employees' reviews for the whole organization, click on the Include Subordinate Organizations box.
3. Select Active by Review Type for the Review Template field; choose Performance Review; choose Step 3: End-of-Year Review; choose 2017-18 Step 3: End of Year Review; click OK

There are additional options to filter the results, as you wish.

Q: A staff member reports to me in Workday but has a dual reporting relationship with another manager. How do I incorporate the feedback from another manager(s) into my appraisal?

A: The first step in the Workday end-of-year review process for both employees and managers is the **Get Additional Manager Evaluation** step. Your employee can identify an additional manager who will then have the ability to provide feedback comments on their review. You will receive a task in your Workday inbox to approve the request before the additional manager is invited to provide feedback.

You may also identify an additional manager to provide feedback on your employee's review—both additional managers may provide feedback comments that will appear directly on your employee's review.

IMPORTANT: Once this step is completed there is no way for you to change it.

- If you approved your employee's request to invite an additional manager to participate in your employee's review process--or if you invited an additional manager to participate-- the additional manager will receive the task in their inbox to Complete Additional Manager Evaluation for your employee. If you no longer wish for the person to provide feedback, you or your employee can ask the person to disregard to the task.
- If you and your employee skipped the task by mistake, you or your employee could ask for the additional manager to provide feedback outside of Workday which can they be uploaded as a supporting document to the review.

If you have further concerns about this step, please submit an inquiry in the WorkLion portal.

Q. How can I incorporate feedback from other people who are familiar with my employee's performance into their review?

A: Feedback from others can be incorporated into your employee's review by directly cutting and pasting from the information provided to you via email or other document formats. In addition, you have the ability to upload separate documents to your employee's review.

Q. If I am unable to complete an evaluation before the deadline, will it disappear from my Workday inbox?

A: The evaluation will remain in your Workday inbox until you complete the review process. If you will not be able to complete your employee's evaluation by the end of May, please contact your HR team.

Q. Does the performance review process relate to the salary increase/merit process?

A: Yes-- the overall rating provided by the manager is directly linked to the merit increase process.