



Performance Management – Managerial

Managerial evaluations are conducted on an annual basis and the entire population of managers are reviewed at the same time.

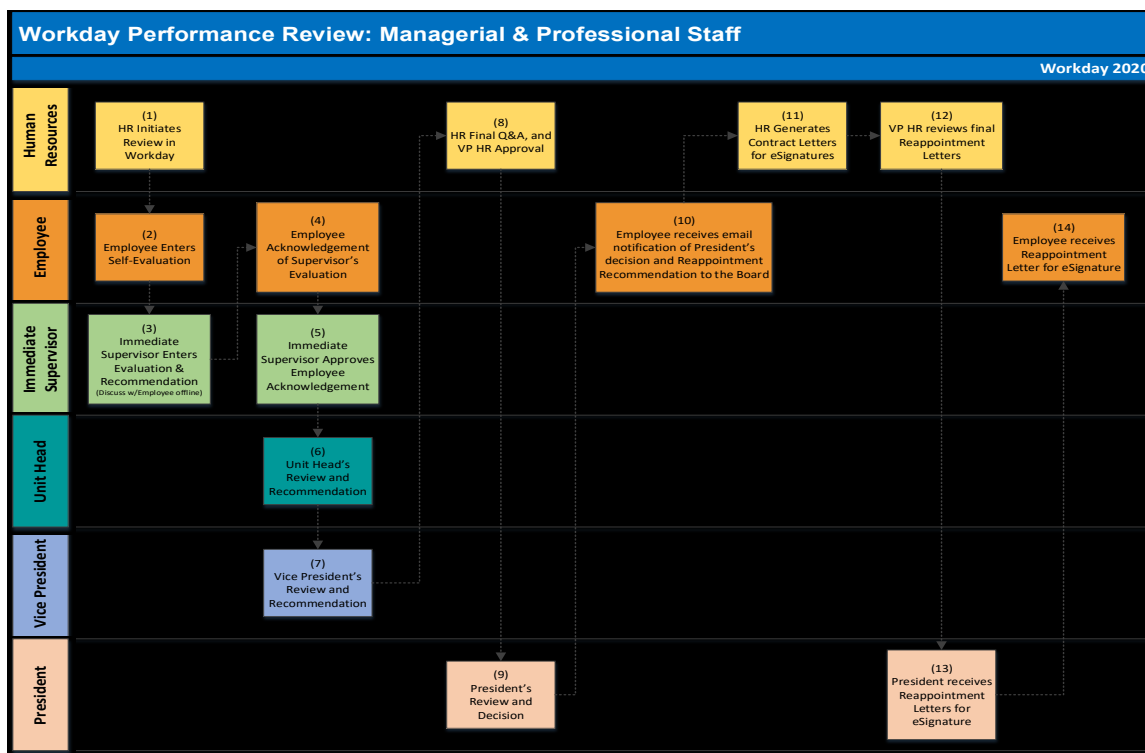
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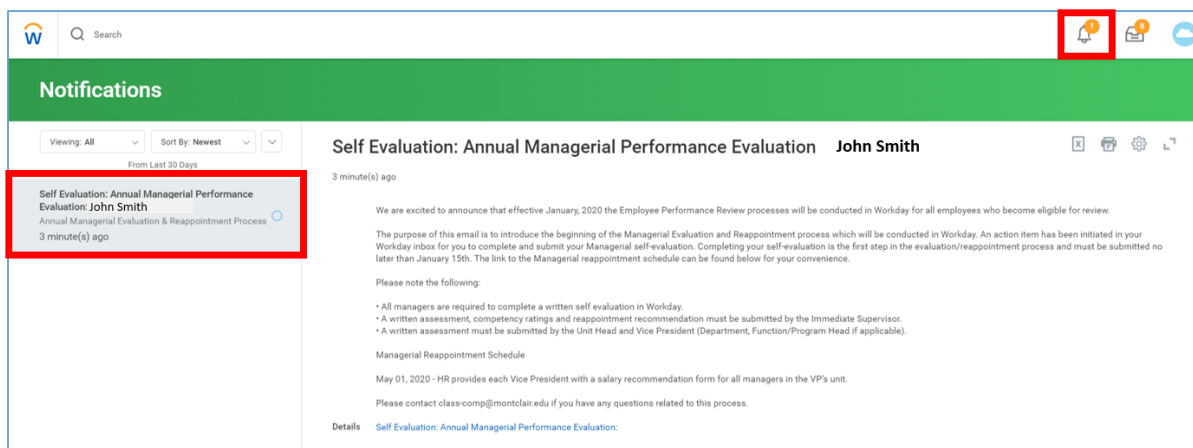
Before You Begin

Human Resources initiates the Performance Review and the Employee will receive an email and a Workday notification alerting them that the review process is starting. The email will contain information about the review process and a link to the performance review timeline/schedule (this can also be found on the Human Resources website). Employee will login to Workday and click on the Workday Inbox in the top right corner of the landing page. Then, click the task in the Inbox labeled “Manager Self Evaluation”.

Performance Review Process

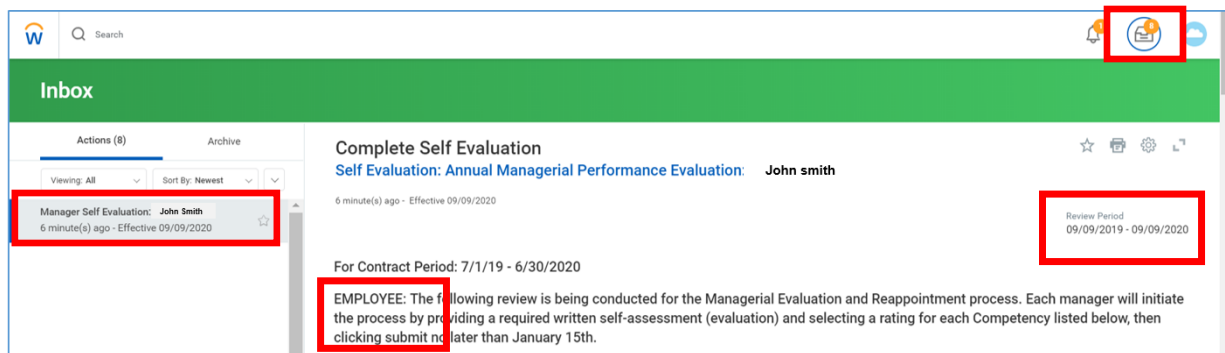


Employee Receives Email and Notification of Review Process

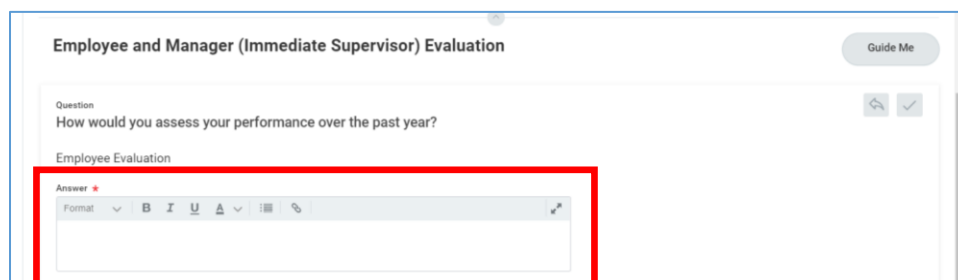


Employee Completes Self Evaluation

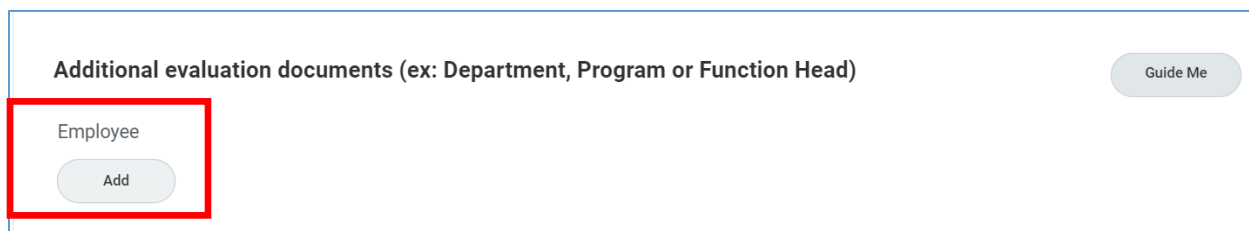
- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Manager Self Evaluation** task under **Actions**.
- 3) Review the **Review Period** which contains the period being reviewed, and the Help text **“EMPLOYEE”** paragraph which contains instructions and due date for completing the evaluation.



- 4) In the **Employee and Manager (Immediate Supervisor) Evaluation** section, enter your Answer to the question: **How would you assess your performance over the past year?** by clicking directly in the text box and entering your comments. (You can also cut and paste information into the box).



- 5) In the **Additional evaluation documents** section, you may include attachments to support your self evaluation by clicking **Add**. For example; Department, Program, Function Head evaluation, letters of acknowledgement, samples of work, etc.



- 6) Enter any comments you may have in the **Comment** section.

Additional evaluation documents (ex: Department, Program or Function Head)

Employee

Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

Upload Date
(empty)

Comment

The remaining sections are *read-only* for the Employee, and provide visibility into the next steps in the review process:

- Competency Review: To be completed by the Immediate Supervisor once the self evaluation is submitted.
- Immediate Supervisor Reappointment Recommendation
- Immediate Supervisor Overall Rating
- Unit Head Overall Rating
- Unit Head Reappointment Recommendation
- Vice President Reappointment Recommendation

The Immediate Supervisor will receive a **Manager Immediate Supervisor Evaluation** task in their Workday Inbox.

7) Click **Submit** when done.

Save for Later

- 1) Click the **Save for Later** button to save your request and return to it later.
- 2) Navigate to the **Inbox** and click the **Actions** tab to locate and open the saved request and continue to work on it.

Vice President Reappointment Recommendation

Submit

Save for Later

Close

Immediate Supervisor's Evaluation and Recommendation

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Manager Immediate Supervisor Evaluation** task under **Actions**.
- 3) At the top of the page, review the **Review Period**, which contains the period being reviewed, and the Help text "**IMMEDIATE SUPERVISOR**" paragraph which contains instructions for completing the evaluation.

Inbox

Actions (5) Archive

Viewing: All Sort By: Newest

Manager Immediate Supervisor Evaluation: John Smith
14 second(s) ago - Effective 09/09/2020

Complete Manager Evaluation
Manager Evaluation: Annual Managerial Performance Evaluation: John Smith
14 second(s) ago - Effective 09/09/2020

Review Period: 09/09/2019 - 09/09/2020

For Contract Period: 7/1/19 - 6/30/2020

EMPLOYEE: The following review is being conducted for the Managerial Evaluation and Reappointment process. Each manager will initiate the process by providing a required written self-assessment (evaluation) and selecting a rating for each Competency listed below, then clicking submit no later than January 15th.

IMMEDIATE SUPERVISOR: You must complete the Competency section by indicating a rating for each Competency listed below. In addition, you must provide a written evaluative summary of the employee's performance. Then provide your recommendation for reappointment for the employee in question and submit the review. The Managerial Performance Review will then be forwarded to the Unit Head for completion of the next section.

- 4) In the **Employee and Manager (Immediate Supervisor) Evaluation** section, review the employee's self-assessment in the **Employee Evaluation** section. You can also review employee's attachments, if any, under **Additional evaluation documents**.
- 5) Under **Manager Evaluation**, click in the **Answer** field and enter your required written assessment of the employee in the text box. (You can also cut and paste information into the box).

Employee and Manager (Immediate Supervisor) Evaluation Guide Me

Question: How would you assess your performance over the past year?

Manager Evaluation

Answer *

Format B I U A : | Link

Employee Evaluation

Answer: asdfsdf

- 6) In the **Additional evaluation documents** section, you may include attachments to support your evaluation by clicking **Add**.

Additional evaluation documents (ex: Department, Program or Function Head) Guide Me

Manager

Add

- 7) Enter any comments you may have in the **Comment** section.

Additional evaluation documents (ex: Department, Program or Function Head) Guide Me

Manager

Evaluation Supporting Document
(empty) ↶ ✓

File

Attach

Updated By
(empty)

Upload Date
(empty)

Comment

- 8) In the **Competency Review** section, assign a rating to each Competency. Click in the **Rating** field and select from the following:
- Outstanding
 - Exceeds Expectations
 - Meets Expectations
 - Needs Improvement
 - Unsatisfactory

Competency Review Guide Me

Competency
Leading Change & Innovation - The ability to bring about operational and strategic change to meet unit/MSU goals, both within the unit and across University. The ability to establish a unit/organizational vision and to implement it in a continuously changing environment. ↶ ✓

Category
Innovation - Embracing innovation, experimentation and creativity for excellence and efficiency.

Attributes
Creativity and Innovation
Flexibility
Leading Execution
Project Management
Resilience
Strategic Thinking
Vision

Manager Evaluation

Rating *

select one

select one

1 - Unsatisfactory

2 - Needs Improvement

3 - Meets Expectations

4 - Exceeds Expectations

5 - Outstanding

Submit Send Back Save for Later Close

- 9) Enter any comments you may have in the **Comment** section.
- 10) Repeat steps for each **Competency**.

11) In the **Immediate Supervisor Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field, and selecting from the following:

- Recommended
- Not Recommended

The screenshot shows the 'Immediate Supervisor Reappointment Recommendation' form. At the top right is a 'Guide Me' button. The 'Question' section contains the text 'Do you recommend reappointment?' with a 'Share' icon and a 'Checkmark' icon. Below this is the 'Manager Evaluation' section. The 'Rating' field is highlighted with a red star and has a dropdown menu open showing 'select one', 'Recommended', and 'Not Recommended'. At the bottom right is another 'Guide Me' button.

12) In the **Immediate Supervisor Overall Rating** section, please provide your rating of the employee by clicking in the **Rating** field, and selecting from the following:

- Outstanding
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory

The screenshot shows the 'Immediate Supervisor Overall Rating' form. At the top right is a 'Guide Me' button. The 'Question' section contains the text 'Please provide your rating.' with a 'Share' icon and a 'Checkmark' icon. Below this is the 'Manager Evaluation' section. The 'Rating' field is highlighted with a red star and has a dropdown menu open showing 'select one', '1 - Unsatisfactory', '2 - Needs Improvement', '3 - Meets Expectations', '4 - Exceeds Expectations', and '5 - Outstanding'. At the bottom right is another 'Guide Me' button.

Note-The next section must be completed by the Unit Head only. If an entry is made inadvertently by someone other than the Unit Head, an error message will display, and the entry will have to be deleted before submitting.

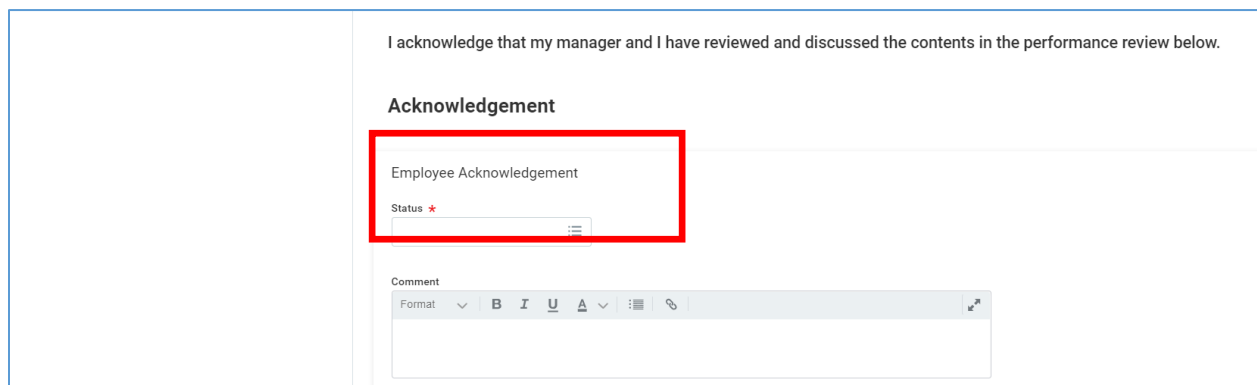
13) Click **Submit** or **Save for Later**.

The employee will receive the **Employee Performance Review Acknowledgement** task in their Workday Inbox.

Note- Immediate Supervisor should meet with the employee to discuss the evaluation before submitting.

Employee Acknowledgment

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Employee Performance Review Acknowledgement** task under **Actions**.
- 3) Review the Immediate Supervisor's Written Assessment, Additional evaluation documents (if any), Competencies, Ratings and Overall Rating sections.
- 4) Enter your **Acknowledgement** at the top of the page by clicking **Status**, and selecting from the following:
 - I acknowledge with comments (enter any comments into the field below).
 - I acknowledge without comments.



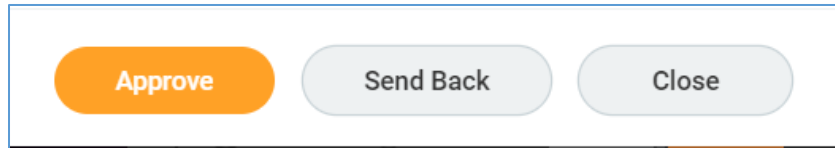
- 5) Click **Submit**.

The Immediate Supervisor will receive the **Employee Performance Review Acknowledgement** task in their Workday Inbox.

Immediate Supervisor Review of Acknowledgement

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Manager Evaluation: Annual Managerial Performance Evaluation** task under **Actions**.
- 3) Review employee acknowledgement status, and comments provided, if any.

Note- Immediate Supervisor may respond to the employee's comments by clicking **Send Back** to return the item for the employee's review, or move it forward by clicking **Approve**.



4) Click **Approve**.

The review will be routed to the Unit Head for review and recommendation.

Note- If the Immediate Supervisor is also a Unit Head, the Unit Head approval step will be skipped and the Vice President will receive a **Vice President's Recommendation for Managerial Performance Review** task in their Workday inbox.

Unit Head Recommendation

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Unit Head's Recommendation for Managerial Performance Review** task under **Actions**.
- 3) Review the Employee Acknowledgement, the Immediate Supervisor's and Employee's Written Evaluations, Additional evaluation documents (if any), Competency Ratings, Overall Ratings and Reappointment Recommendation.
- 4) In the **Unit Head Overall Rating** section, provide an overall rating by clicking the **Rating** field and select from the following:
 - Outstanding
 - Exceeds Expectations
 - Meets Expectations
 - Needs Improvement
 - Unsatisfactory

- 5) In the **Unit Head Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field and selecting from the following:
 - Recommended
 - Not Recommended
- 6) In the **Answer** field, enter your required written assessment. (You can also cut and paste information into the box).

Note: If the Unit Head is also the Vice President, the Vice President's approval step will be skipped and Human Resources will receive the evaluation in their Workday Inbox.

Vice President Recommendation

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Vice President's Recommendation for Managerial Performance Review** task under **Actions**.
- 3) Review the Employee Acknowledgement, the Immediate Supervisor's and Employee's Written Evaluations, Additional evaluation documents (if any), Competency Ratings, Overall Ratings and Reappointment Recommendation.
- 4) In the **Vice President Overall Rating** section, provide an overall rating by clicking the **Rating** field and select from the following:
 - Outstanding
 - Exceeds Expectations
 - Meets Expectations
 - Needs Improvement
 - Unsatisfactory

5) In the **Vice President Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field and selecting from the following:

- Recommended
- Not Recommended

6) In the **Answer** field, enter your required written assessment. (You can also cut and paste information into the box).

7) Click **Add** under **Additional evaluation documents** and then click **Attach** to upload any supporting evaluation documents, if applicable.

8) Click **Approve**.

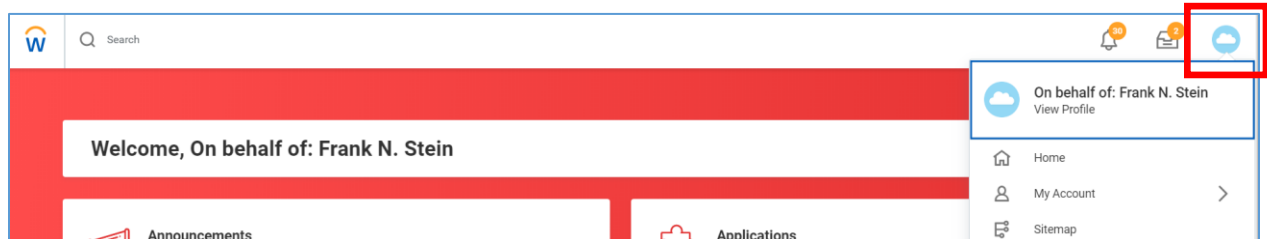
The overall review will then be routed in Workday through the following approval process:

- Human Resources
- President

Employee Receives Copy of Performance Review

Employee can access a copy of their Performance Review after Vice President Acknowledge task in their Workday Profile.

- 1) Click the cloud icon in the top right corner of Workday.
- 2) Click **View Profile**.



3) Click **Personal** in the left menu.

4) Click on the **Documents** tab.

A copy of the Performance Review and Notification Letter can be found under **Reviewed Documents**.

After performance reappointment recommendations have been approved by the Board of Trustees, the employee will receive a copy of the Contract Letter in their Workday Inbox for electronic signature via DocuSign.

Employee Receives Notification Letter

After President's approval, the employee will receive a Notification Letter in their Workday Inbox.

- 1) Click on the Inbox in the top right corner.

- 2) Click the **Notification Letter** task under **Actions**.
- 3) Click the “**I Agree**” checkbox.
- 4) Enter any comments in the **Comment** field, if applicable.
- 5) Click **Submit**.

The screenshot shows the Workday Inbox interface. At the top is a red header with the word 'Inbox'. Below it, there's a sidebar on the left with 'Actions (3)' and 'Archive' tabs. Under 'Actions (3)', there's a list of items, including 'Notification Letter: Frank N. Stein' with a star icon. The main content area on the right is titled 'Notification Letter' and shows 'Review Documents for Annual Managerial Performance Evaluation: Frank N. Stein'. It includes a timestamp '1 second(s) ago - Effective 08/01/2020'. Below this, there's a 'Documents' section with a document titled 'Notification Letter 11/25/2019.pdf'. Underneath the document, there's a 'Signature Statement' section with 'I agree' and a checked 'I Agree' checkbox. At the bottom, there's a 'Comment' field and three buttons: 'Submit' (orange), 'Save for Later' (grey), and 'Cancel' (grey).

Employee DocuSigns Contract Letter

- 1) Click the **Annual Managerial Performance Evaluation** task in your Workday Inbox.
- 2) Click **eSign by DocuSign**.
- 3) Click the checkbox “**I agree to use electronic records and signatures.**”
- 4) Click **Continue**.
- 5) Review the letter, including comments from the President.
- 6) Click **Sign**.
- 7) Click **Finish**.
- 8) Enter **Comments**, if any.
- 9) Click **Submit**.