


Start Performance Review for a Worker

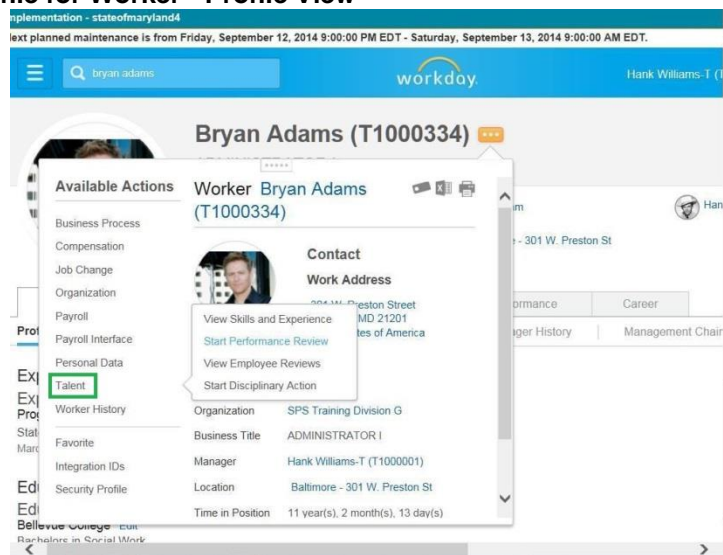
Use the procedure below to record enter the end-of-cycle or mid cycle Performance Evaluation Plan (PEP) rating for an employee for the fiscal year. Employees hired between January and June are due for an Annual PEP and employees hired between July and December are due for a Mid Cycle PEP.

No employee or manager acknowledgment is required in the system after the rating is entered; however, each employee can review their PEP rating on the **Performance** tab of their Worker Profile. Supporting documents for the employee's rating can be uploaded, if needed.

Procedure:

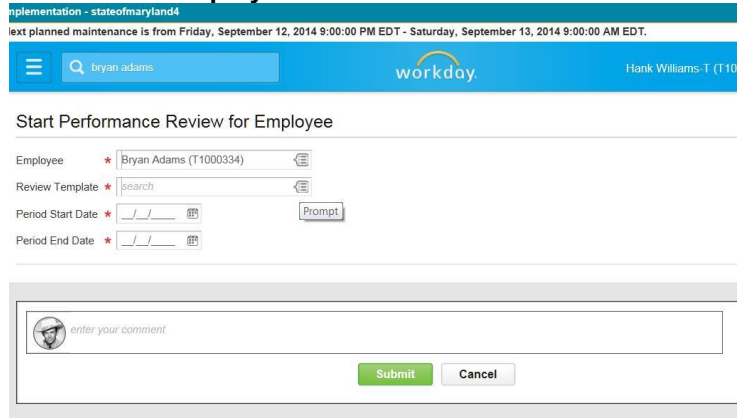
1. Search for the employee.
HINT: Type the employee's name or employee ID ("W" number) in the search field and hit enter or search for the employee's supervisory organization and click the **Members** tab.
2. Click the Related Actions and Preview icon  next to the employee's name.

Professional Profile for Worker - Profile View



3. In the menu, hover over the Talent hyperlink and then click Start Performance Review.

Start Performance Review for Employee



System Status: The next Weekly Service Update will be on Friday, September 12, 2014 from 6:00 p.m. PDT (GMT -7)... © 2014 Workday

4. Type or use the prompt to select the appropriate review template (i.e., the Annual (End) or Mid Cycle PEP for the employee based on the employee’s hire date).



Information: The **Period Start Date** and **Period End Date** fields populate from the template selected.

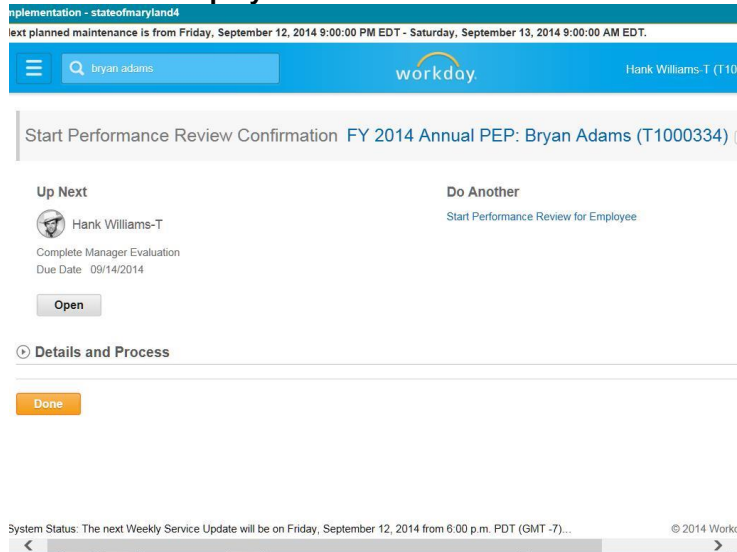
5. If needed, enter a comment in the field.
6. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also

- Click **Cancel** to cancel the process and start at another time.

Start Performance Review for Employee



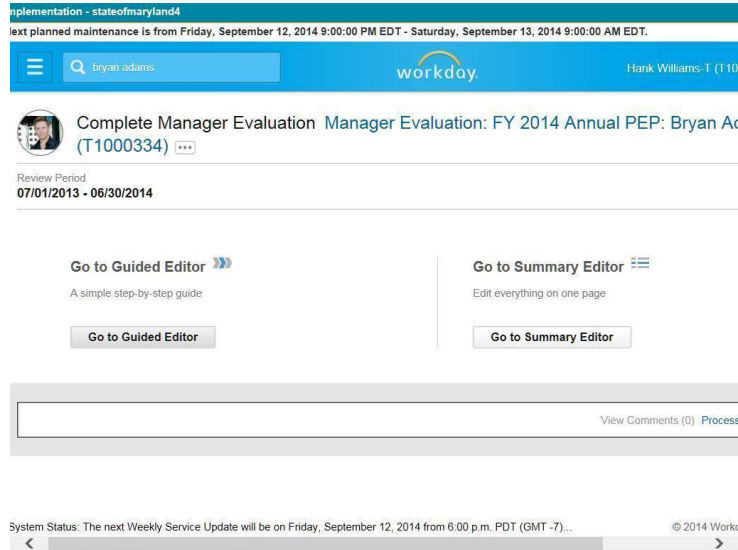
System Status: The next Weekly Service Update will be on Friday, September 12, 2014 from 6:00 p.m. PDT (GMT -7)... © 2014 Workday

7. Click the **Open**  button.



Information: The next step in the process is the Complete Manager Evaluation.

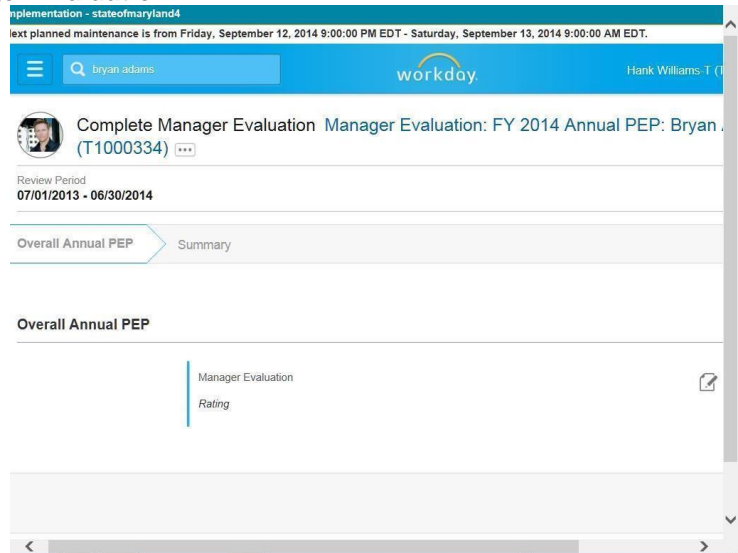
Complete Manager Evaluation




The screenshot shows the Workday interface for a Complete Manager Evaluation. At the top, there is a navigation bar with the Workday logo and a search bar containing 'bryan.adams'. Below the navigation bar, the page title is 'Complete Manager Evaluation Manager Evaluation: FY 2014 Annual PEP: Bryan Adams (T1000334)'. The review period is listed as '07/01/2013 - 06/30/2014'. There are two main buttons: 'Go to Guided Editor' and 'Go to Summary Editor'. The 'Go to Guided Editor' button is highlighted with a tooltip that says 'A simple step-by-step guide'. The 'Go to Summary Editor' button has a tooltip that says 'Edit everything on one page'. At the bottom of the page, there is a system status message: 'System Status: The next Weekly Service Update will be on Friday, September 12, 2014 from 6:00 p.m. PDT (GMT -7)...'.

8. Click the **Go to Guided Editor** button.

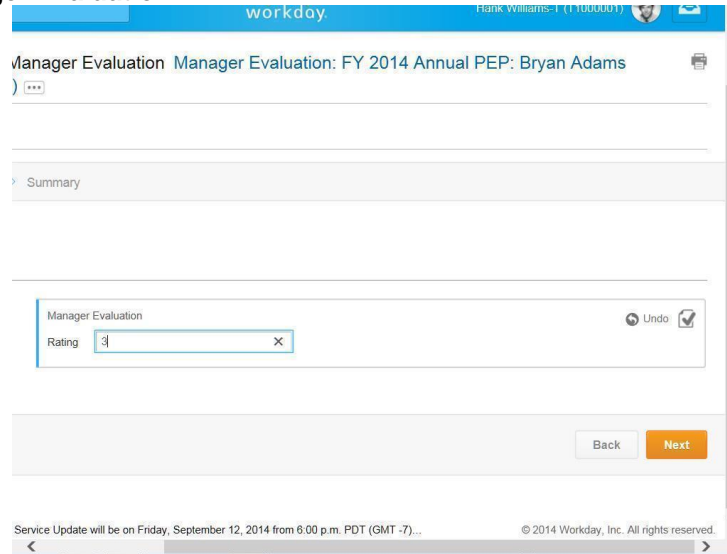
Complete Manager Evaluation



The screenshot shows the Workday interface for a Complete Manager Evaluation, specifically the Summary tab. The page title is 'Complete Manager Evaluation Manager Evaluation: FY 2014 Annual PEP: Bryan Adams (T1000334)'. The review period is listed as '07/01/2013 - 06/30/2014'. The 'Overall Annual PEP' section is active, and the 'Summary' tab is selected. Below the 'Overall Annual PEP' section, there is a 'Manager Evaluation' section with a 'Rating' field. An edit icon (pencil) is visible next to the 'Rating' field.

9. Click the Edit  icon to add the employee PEP rating.
10. Type the employee rating (from 1-3) that appears on the form from the manager in the Rating field.

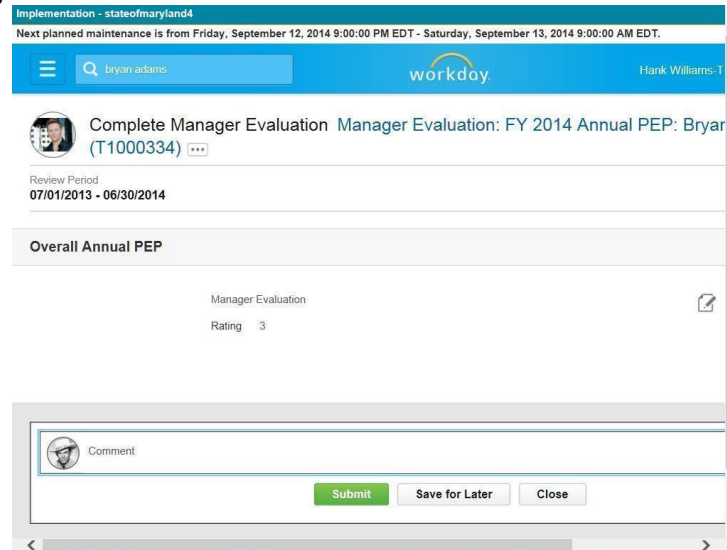
Complete Manager Evaluation



The screenshot shows the 'Manager Evaluation' form in Workday. The title is 'Manager Evaluation: FY 2014 Annual PEP: Bryan Adams'. Below the title is a 'Summary' section. A 'Manager Evaluation' box contains a 'Rating' dropdown menu with the value '3' selected. To the right of the rating box are 'Undo' and 'Checkmark' icons. At the bottom right of the form are 'Back' and 'Next' buttons. A footer note states: 'Service Update will be on Friday, September 12, 2014 from 6:00 p.m. PDT (GMT -7)... © 2014 Workday, Inc. All rights reserved.'

11. Click the **Next**  button.

Complete Manager Evaluation



The screenshot shows the 'Complete Manager Evaluation' form in Workday. The title is 'Complete Manager Evaluation: FY 2014 Annual PEP: Bryan Adams (T1000334)'. Below the title is the 'Review Period' '07/01/2013 - 06/30/2014'. The 'Overall Annual PEP' section shows a 'Manager Evaluation' box with a 'Rating' of '3'. Below this is a 'Comment' field with a 'Submit' button, a 'Save for Later' button, and a 'Close' button. The top of the page shows the Workday navigation bar with a search bar containing 'Bryan Adams' and the user name 'Hank Williams-T'.

12. Enter a comment in the Comment field, if applicable.

13. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Close** to cancel the process and start at another time.

14. Click the **Done**  button.

15. The System Task is complete.