Performance Review for a Worker as a Manager (Full online)

Use the procedure below to process the end-of-cycle or mid cycle Performance Evaluation Plan (PEP) for an employee using the full version of the PEP not just an overall rating. The correct MID or ANNUAL version of the evaluation will be based on the employee's Continuous Service date. The correct type of PEP will be available to select (Supervisory, Non-Supervisory and Management) and needs to be selected accurately.

> ****NOTE:** *If the incorrect PEP template is completed, you will need to submit a ticket to the SPS Help Desk to have it rescinded, then complete the appropriate PEP evaluation before the end of your agency's cycle deadline.*

After completion, each employee can review their PEP on the **Performance** tab of their Worker Profile. Supporting documents for the employee can be uploaded, if needed.

IMPORTANT PEP REMINDERS:

➢ Employees who work even one day during the rating period must receive a PEP.
➢ Supervisors may leave ratings as non-applicable, for tasks the employee did not complete due to extended absences.
➢ Supervisors should explain in the comments section that the employee was absent for an extended period during the rating cycle, how long the employee actually worked, and why certain ratings are left blank.

When to use the Absent Entire Rating Period (*Examples are provided below:)*

- o An employee is due a Mid-Cycle PEP but has been absent the entire rating period to that point. Absent Entire Rating Period *IS appropriate* for this scenario.
- o An employee is due an End-of-Cycle PEP. The employee was absent for the past 6 months, but reported to work at least some of the time during the prior 6 months. The employee should receive a PEP rating. Absent Entire Rating Period *is NOT appropriate* for this scenario
- o The employee is due an End-of-Cycle PEP but was absent and did no work for the entire 12 months of the rating period. Absent Entire Rating Period *IS appropriate* for this scenario

MEMO Important Information:*(instructions begin on page16)*

If, in the supervisor's opinion, the employee's overall performance during this mid-cycle time has been Satisfactory or better, the supervisor need not complete a full evaluation using the PEP instrument, and need only document in writing (i.e.: e-mail or memo to the employee with a copy to the personnel file) that the mid-cycle meeting occurred. This is to include how the supervisor would rate the employee's work during this time.

Since this is a written document, the rating must be either: Outstanding or Satisfactory. The individual responsible for entering the rating into Workday can then enter the appropriate numerical equivalent. If this method is used, the supervisor need not complete the entire PEP instrument, but should use the MEMO version.

Start a Performance Evaluation

FULL ONLINE Performance Evaluation 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 ![Actions] next to the employee's name.
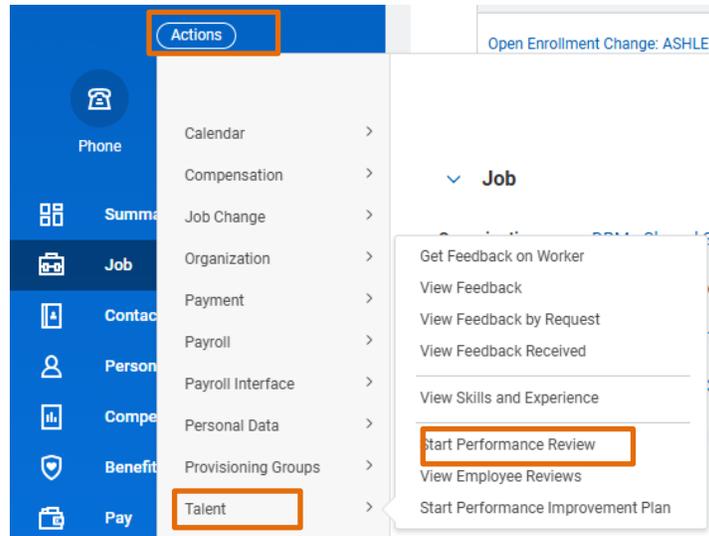
3. In the menu, hover over the Talent hyperlink and then click Start Performance Review.
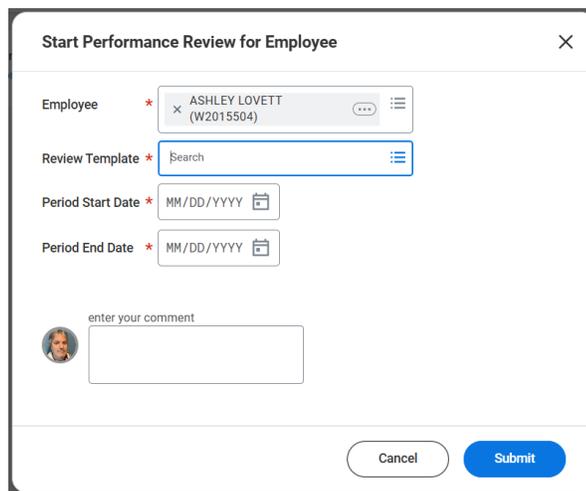

4. Use the drop down in Review Template prompt to select the appropriate PEP option for the employee (i.e., **b. PEP Online Mid Cycle Process** or **c. PEP Online Annual/End Cycle Process**), the correct MID or ANNUAL version will be available to select based on employee's Continuous Service date. Then select the appropriate version based on employee's status:

   a. *FY 2026 ANNUAL or MID Management Employees*
   b. *FY 2026 ANNUAL or MID Non-Supervisory Employees*
   c. *FY 2026 ANNUAL or MID Supervisory Employees*

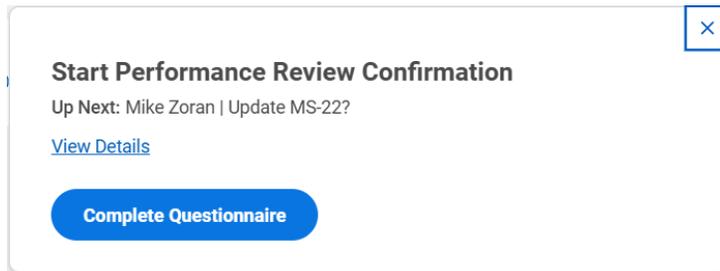**i** **Information**: The **Period Start Date** and **Period End Date** fields populate from the template selected.

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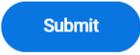
6. Click the **Submit** [Submit] button.

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 Confirmation

Up Next: Mike Zoran | Update MS-22?

View Details

[Complete Questionnaire]

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7. Click the **Complete Questionnaire** [Complete Questionnaire] button.

i **Information**: The next step in the process is to verify that the MS-22 is up to date.

8. Answer the question regarding the accuracy of the current MS-22 using the *Yes* or *No* radio button and hit the Submit button.

Update MS-22? 'MS-22 Up to Date' for FY 2025 ANNUAL Non-Supervisory employees (June 2025) - TEST: ASHLEY LOVETT (W2015504) ⋯

MS-22 Up to Date

Does the employee's Position Description (MS-22) accurately reflect the current, and anticipated, duties and responsibilities for the upcoming review period? If not, upload an accurate MS-22 with all appropriate signatures in the next section.
(Required)

○ Yes
○ No

[Submit] [Save for Later] [Cancel]

NOTE: If "No" is selected on the MS-22 Up to Date page, after completion of the performance evaluation process, there will be a To-Do in the manager's My Task Box with instructions to work with HR to update this information through an Edit Position Restriction transaction.
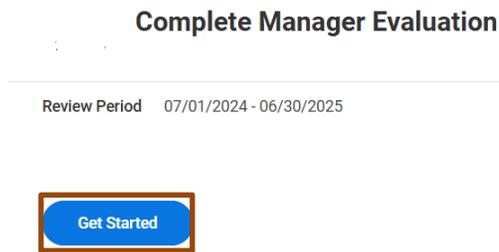

9. Next, Click the Complete Questionnaire button to go to the Manager Instructions questionnaire.

10. You will need to verify that the PEP evaluation process is understood and that you have relevant employee information to complete it. Select "Yes" to continue.
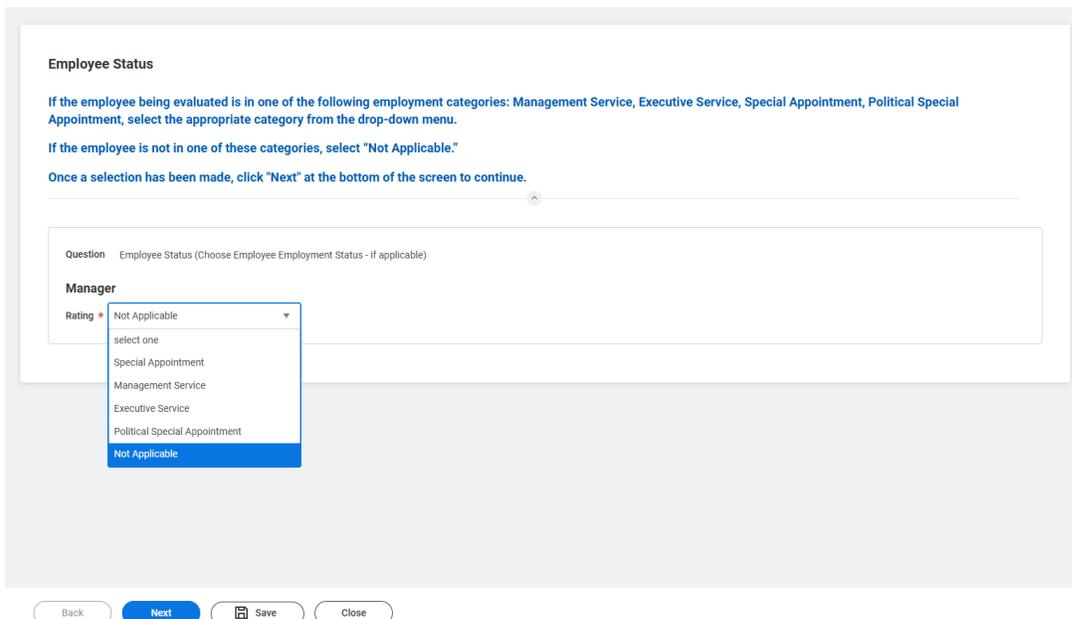
11. Click the open button to proceed to Complete Manager Evaluation.

You have submitted

Up Next: Mike Zoran | Complete Manager Evaluation | Due Date 06/05/2025

View Details

Open
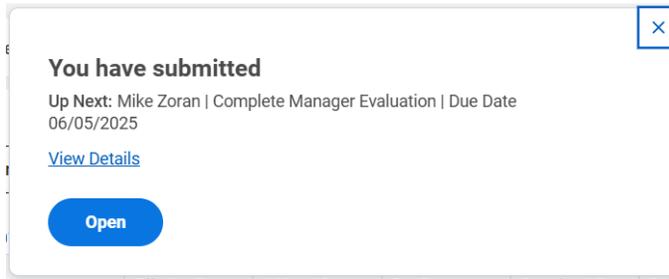
12. On the following page, select "Get Started".

Complete Manager Evaluation

Review Period   07/01/2024 - 06/30/2025

Get Started

13. Enter the Employee's Status as appropriate from the prompt drop-down and select "Next".

Employee Status

If the employee being evaluated is in one of the following employment categories: Management Service, Executive Service, Special Appointment, Political Special Appointment, select the appropriate category from the drop-down menu.

If the employee is not in one of these categories, select "Not Applicable."

Once a selection has been made, click "Next" at the bottom of the screen to continue.

Question   Employee Status (Choose Employee Employment Status - if applicable)

Manager

Rating *   Not Applicable

select one
Special Appointment
Management Service
Executive Service
Political Special Appointment
Not Applicable

Back   Next   Save   Close

14. In the Position Specific Performance Elements section, each *performance standard* that is found on the employee's MS-22 should be **copied and pasted individually (using control C to copy and control V to paste), into each question's "Answer" space**. A rating must be selected for each entry. When all entries are completed, select "Next".

15. Begin by entering the Employee's Overall Work Quality Rating:
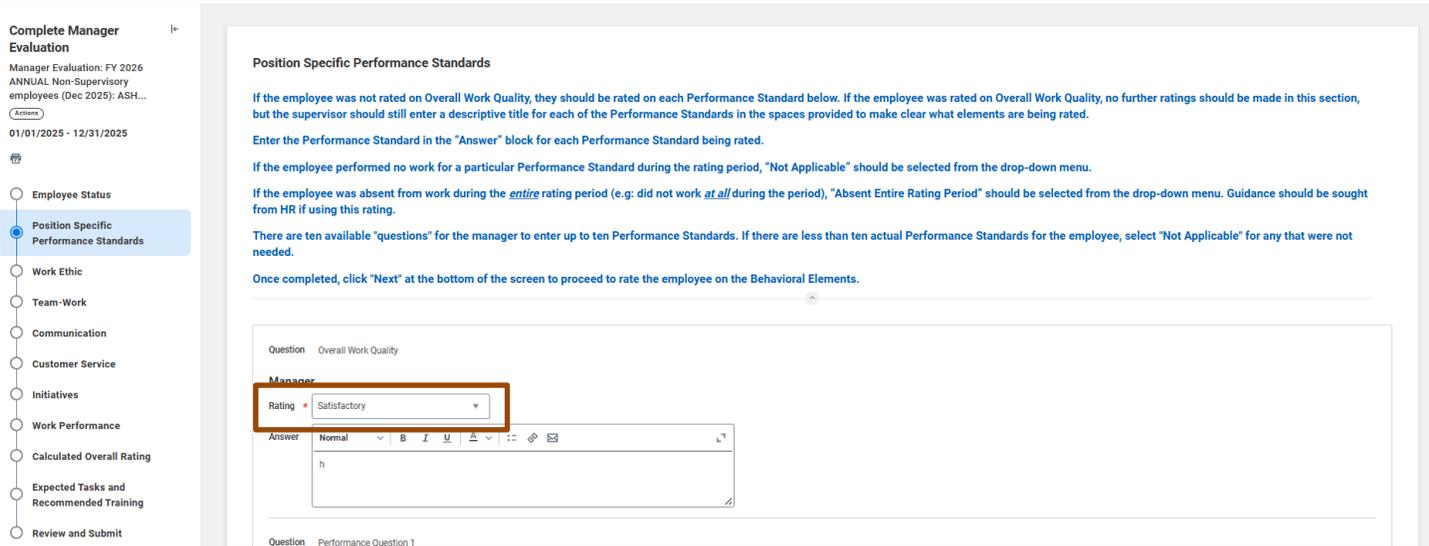
NOTES:

➢ IF the employee's overall performance in the *Performance of Job Duties* section is Satisfactory or Outstanding, the supervisor may choose to complete EITHER the *Overall Work Quality* rating OR rate each performance standard individually, instead of both.

- If the supervisor has chosen to complete the *Overall Work Quality* rating INSTEAD of rating each performance standard individually, each standard must still be copy and pasted, as directed, and given the rating of "*Not Applicable*".
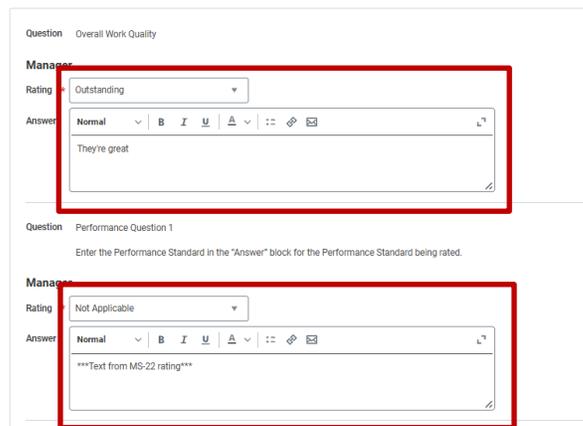
➢ IF any performance standard is Unsatisfactory, supervisors must rate the Overall Work Quality as Not Applicable, then continue to the next section AND complete individual ratings for each one.

<u>Note</u>: Once all standards have been entered for this employee (*or if the supervisor has chosen to only use the Overall Work Quality rating*), <u>any question spaces that are left empty, or do not have a performance standard to enter, you should select "Not Applicable"</u> from the rating dropdown to complete the page (all question prompts require a rating selection).

Manager

Rating	*	Not Applicable ▼
		select one
Rating Description		Unsatisfactory
Answer		Satisfactory
		Outstanding
		Not Applicable
		Absent Entire Rating Period

16. On the Work Ethic page, enter a rating in response to all listed questions. When complete select "Next".

Worker Ethic

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Maintains good attendance (The use of FMLA-qualifying leave should not be considered)

Manager

Rating	*	Satisfactory ▼

Rating Description   Met the required and expected results for the job. Good performance which is expected of a fully experienced or competent employee.

Question   Follows call-in/leave policies

Manager

Rating	*	Satisfactory ▼

Rating Description   Met the required and expected results for the job. Good performance which is expected of a fully experienced or competent employee.

Question   Reports to work area on time and does not leave until designated time

(Back)   (Next)   (🖫 Save)   (Close)

17. On the Team-Work page, select the correct response to the question(s) displayed, and select "Next".

Team-Work

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Works cooperatively with others to implement the Department's goals

Manager

Rating   *   select one ▼

Rating Description   (empty)

Manager Summary

Calculated Rating   (empty)

Rating Description   (empty)

[Back] [Next] [Save] [Close]

18. On the Communication page, answer all questions from the prompt selections, then select "Next" button.

Communication

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Speaks effectively

Manager

Rating   *   Satisfactory ▼

Rating Description   Met the required and expected results for the job. Good performance which is expected of a fully experienced or competent employee.

Question   Writes effectively (clear, organized, appropriate grammar, punctuation)

Manager

Rating   *   select one ▼

Rating Description   (empty)

Question   Interacts positively with co-workers

[Back] [Next] [Save] [Close]

19. The Customer Service section is next. Answer all questions from the rating drop-down menu and then select "Next".

Customer Service

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Strives to meet customer requirements

Manager

Rating   * [select one ▾]

Rating Description   (empty)

Question   Is courteous to customers and co-workers

Manager

Rating   * [select one ▾]

Rating Description   (empty)

Question   Provides timely, accurate and appropriate information to internal and external customers

[Back] [Next] [🖫 Save] [Close]

20. Next up is the Initiatives section. Once all questions have been answered, select "Next".

Initiatives

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Solves problems without being asked

Manager

Rating   * [select one ▾]

Rating Description   (empty)

Question   Works to continuously improve processes

Manager

Rating   * [select one ▾]

Rating Description   (empty)

Question   Engages in opportunities for self-improvement

[Back] [Next] [🖫 Save] [Close]

21. On the Work Performance section, select the correct response to the questions displayed, and select "Next".

Work Performance

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question	Appropriately prioritizes work

Manager

Rating　　　★ [select one ▼]

Rating Description　(empty)

Question	Completes assignments accurately and on time

Manager

Rating　　　★ [select one ▼]

Rating Description　(empty)

Question	Maintains confidentiality

[Back] [Next] [Save] [Close]

22. IF the employee being evaluated is a Supervisor or Manager, you will need to complete the *Supervision* section and then select Next. *(If they are non-supervisory, continue to step 24.)*

Supervision

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question	Provides timely performance feedback

Manager

Rating　　　★ [select one ▼]

Rating Description　(empty)

Question	Follows appropriate personnel procedures relating to discipline, sick leave monitoring, hiring and Equal Opportunity

Manager

Rating　　　★ [select one ▼]

Rating Description　(empty)

Question	Contributes positively to employee morale

[Back] [Next] [Save] [Close]

23. IF the employee being evaluated is a Manager, you will need to complete the *Planning* section and then select Next. *(If they are not a Manager, continue to step 24.)*

Planning

Rate each Behavioral Element by selecting the appropriate rating in the drop-down menu.

If a particular Behavioral Element does not apply to the employee being rated, "Not Applicable" should be selected from the drop-down menu.

If the employee was absent from work during the entire rating period (e.g: did not work at all during the period), "Absent Entire Rating Period" should be selected from the drop-down menu. Guidance should be sought from HR if using this rating.

Once completed, click "Next" at the bottom of the screen to proceed.

Question   Consistent with Department's goals, establishes long and short-term objectives

Manager

Rating   * [select one   ▼]

Rating Description   (empty)

Question   Prioritizes work to meet established objectives

Manager

Rating   * [select one   ▼]

Rating Description   (empty)

Manager Summary

(Back) (Next) (🖫 Save) (Close)

24. On this section "Calculated Overall Rating", You will see the calculated PEP rating for the worker. This will provide the overall rating and rating description. If satisfied, select "Next" at the bottom of the page.

Calculated Overall Rating

Manager

Calculated Rating   Satisfactory (Rounded from 1.95)

Rating   Satisfactory

Rating Description   Met the required and expected results for the job. Good performance which is expected of a fully experienced or competent employee.

25. The last page to complete before reviewing the evaluation is Expected Tasks and Recommended Training. Answer the questions for tasks or training recommendations from the dropdown (*Comments Entered Below* or *None)* on this page. Enter any applicable comments in the Answer box. Once completed, select the "Next" button to review the entered PEP information.

Expected Tasks and Recommended Training

The supervisor should also consider whether the employee will be required to perform any specific tasks in the next rating period that are in addition to or outside of the normal duties of the position. Any such tasks should be entered into the *Tasks to be Achieved* box.

If the supervisor determines that based on the employee's strengths and weaknesses training is needed for the next rating period, recommendations should be entered into the Training Recommendations box.

If there are no such tasks or recommended training, the supervisor should select "None" in the rating drop down.

Question   Tasks to be Achieved Before the Next Cycle Rating:

Manager

Answer   Normal   T

Question   Training Recommendations:

Manager

Answer   Normal   T

Back   Next   Save   ...

26. The final page is the Review and Submit section. In this section you should review all entered information for accuracy. If any of the previous pages need to be modified or changed, navigate to that page using the section panel on the left side of the PEP screen. Once all information has been reviewed, select the "Submit" button at the bottom of the page.

    Important Note: This screen is the LAST place in the process that the manager can make changes to the ratings entered.
    ➢ Managers should stop here to meet with the employee, and make any edits needed before submitting.

    Note: You have the option to print the complete PEP or as you go using the icon on the left side panel (see below in orange). If selected, Workday will display a message and when the document is created, you can find and export it from either the My Reports page or through your 🔔 notifications.

27. Next up will be the manager's comments. Click the "Open" button to proceed to this task.

28. Please read and confirm the information on the Provide Manager Review Comments page by selecting "Get Started".

After clicking the "Get Started" button below:

1. You may scroll down to review the performance evaluation. Click the "Next" button at the bottom to move to the next screen.

2. The second screen has two parts:
   a. Use the drop down box to acknowledge that I understand and adhere to the Governor's Code of Fair Employment Practices, 01.01.2007.16.
   b. Enter Supervisor's Comments into the box provided.
      NOTE: Any Unsatisfactory or Outstanding rating on any individual Performance Standard or Behavioral Element, that Standard or Element must be noted in the Supervisor's Comments along with a satisfactory explanation of why that rating is warranted.

Then, click [SUBMIT] on the bottom left corner of the screen.
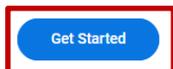
29. On the Summary page, review the PEP details again before selecting "Next".

Provide Manager Review Comments

Manager Evaluation: FY 2026 ANNUAL Non-Supervisory employees (Dec 2025): ASH...

Actions

01/01/2025 - 12/31/2025
Evaluated By: ASHLEY LOVE...

- Summary
- Acknowledgement

Summary

Employee Status

Question: Employee Status (Choose Employee Employment Status - if applicable)

Manager

Rating: Not Applicable

Position Specific Performance Standards

Question: Overall Work Quality

Manager

Rating: Outstanding

Answer: They're great

Question: Performance Question 1
Enter the Performance Standard in the "Answer" block for the Performance Standard being rated.

Manager

Rating: Not Applicable

Back   Next   Close

Note: You have the option to print the complete PEP or as you go using the icon on the left side panel (see above in orange). If selected, Workday will display a message and when the document is created, you can find and export it from either the My Reports page or through your 🔔⁷ notifications.

Print Document

A printable Review Document is being generated. When your file is ready for download, you will be able to access the document from the notification link next to your sign-in name or from the My Reports task.

OK

30. Manager comments should be entered on <u>the Acknowledgement page in the Comment section under the Status prompt.</u> When complete, select "Submit".

Provide Manager Review Comments

Manager Evaluation: TESTING FY 2025 ANNUAL Non-Supervisory employees ...

Actions

07/01/2024 - 06/30/2025
Evaluated By: ASHLEY LOVE...

- Summary
- Acknowledgement

Acknowledgement

Manager

Status *   × Supervisor Only - Acknowledge PEP

Comment   Normal | B I U A | ≔ 🔗 ✉
   Manager Comments to be seen.

Process History

Mike Zoran (W1074409)   1 minute ago
Complete Manager Evaluation for Performance Review– Submitted

Mike Zoran (W1074409)
Provide Manager Review Comments– Awaiting Action

Submit   Save for Later

Workday will display a submission confirmation message and the PEP will be routed to the employee next.

> IF the employee is Executive or Management Service or Special or Political Special Appointment then an Employee Status Acknowledgement of At Will Employment will be next, before they enter employee comments.
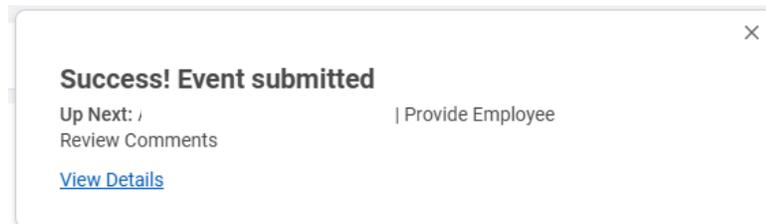
Note: The employee will have the *Employee Review Comments* task in their My Task box for completion. It will be available for the next 10 calendar days, or will be considered "unsigned".

31. After the employee enters and submits their acknowledgement and comments, Workday will display a submission confirmation message and the PEP will be routed to the HR Coordinator for Approval. Then, there will be more approvers based on your agency's guidelines:
    > *Appointing Authority Partner for approval IF the PEP is an End-of-Cycle PEP or Annual.*
    > *Manager's Manager for approval IF the PEP is Mid-Cycle PEP or MID.*

32. The System Task is complete.

Notes:
- Approvers may send PEP back to the manager for changes. This task will be found in the manager's My Task box for correction.

- After approval steps are completed, the PEP is routed to the employee for Acknowledgement and Comments. The approver will need to review the employee's submission for the process to be finalized **IF** the PEP is an End-of-Cycle PEP or Annual.

Start a MID Rating Memo (Online)

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 [Actions] next to the employee's name.
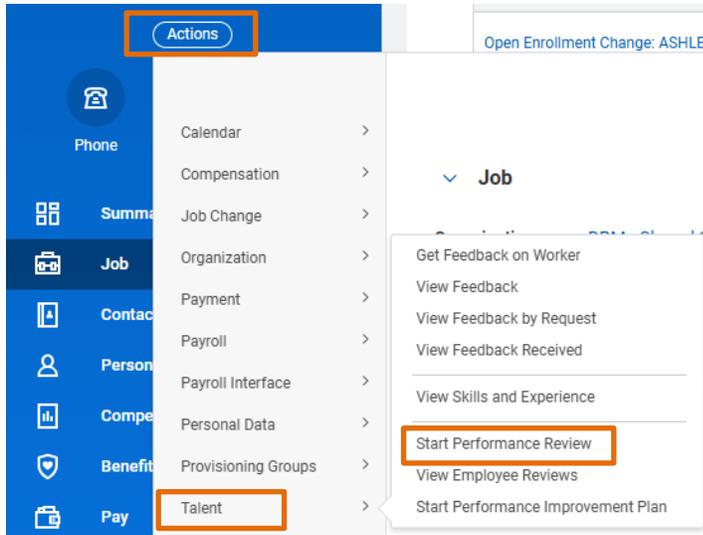
3. In the menu, hover over the Talent hyperlink and then click Start Performance Review.
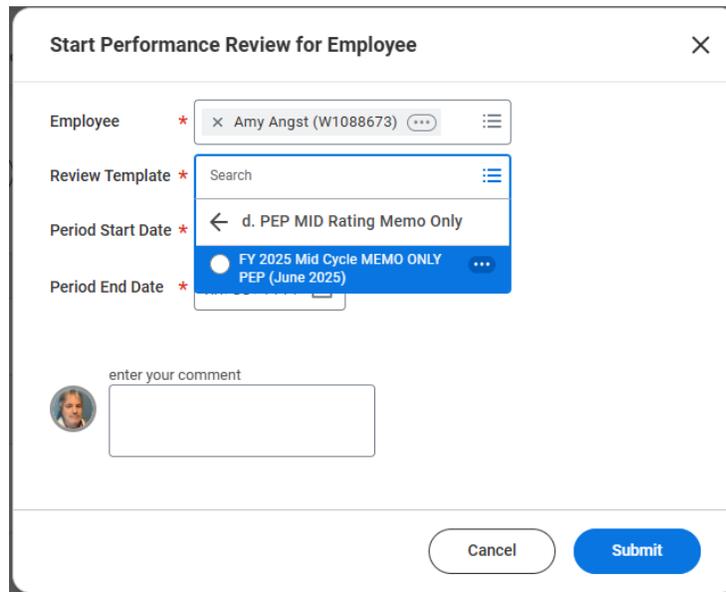
4. Use the drop down in Review Template prompt to select the appropriate MEMO PEP option for the employee (i.e., **d. FY 2025 Mid Cycle MEMO ONLY PEP**), then select Submit.

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

5. Click the Complete Questionnaire button to proceed to the *Complete Manager Evaluation task*.

Start Performance Review Confirmation

Up Next: Carla Foster | PEP Instructions - Memo Only

View Details

Complete Questionnaire
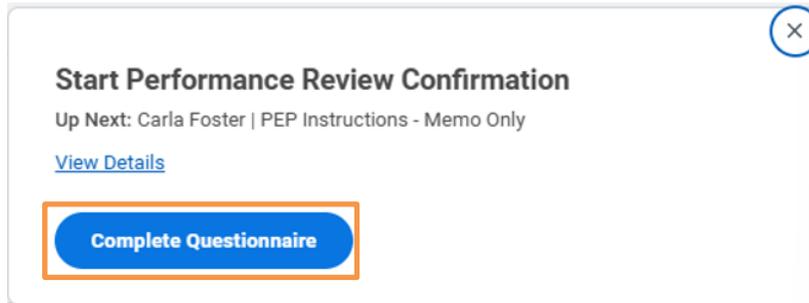
6. Review the PEP – Memo Only Instructions page for process details. Then select "yes" and hit *Submit* to continue.

PEP Instructions - Memo Only   'Manager Instructions - Memo Only' for FY 2026 Mid Cycle MEMO ONLY PEP (Dec 2025): Donna Thomas (W11

Manager Instructions - Memo Only

If, in the supervisor's opinion, the employee's overall performance during this time has been Satisfactory or better, the supervisor nee e-mail or memo to the employee with a copy to the personnel file) that the mid-cycle meeting occurred, and how the supervisor would

Before preparing the evaluation form and meeting with any employees, review the documents on the DBM Performance Planning and the PEP Guidelines and Instructions to familiarize yourself with or refresh your understanding of the PEP process and use the Checkli

Since this is a written document, the rating must be either: Outstanding or Satisfactory. The individual responsible for entering the ra supervisor need not complete the entire PEP instrument.

If you have questions that are not answered in the PEP Guidelines and Instructions, please contact your agency HR unit for guidance.

Please select "yes" then click "Submit" to continue.
(Required)

◉ Yes (Continue)
○ No

Submit   Save for Later   Cancel

7. Next, to Complete Manager Evaluation, click the Open button.

You have submitted

Up Next: Carla Foster | Complete Manager Evaluation | Due Date
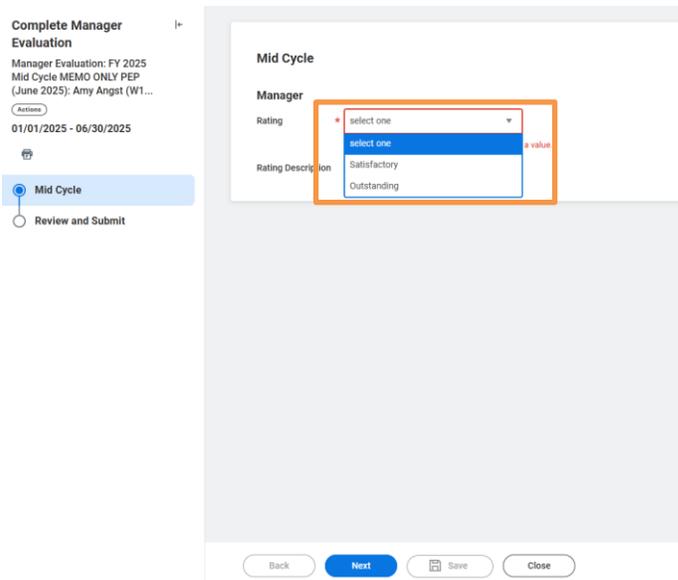12/05/2025

View Details

Open
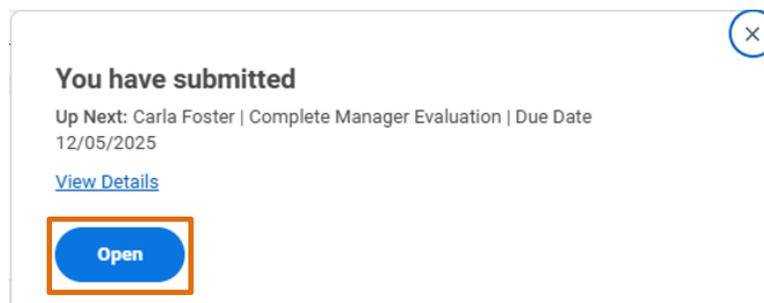
8. Click the *Get Started* button.

Complete Manager Evaluation   Manager Evaluation: FY 2025 Mid Cycle MEMO ONLY PEP

Review Period   01/01/2025 - 06/30/2025

Get Started
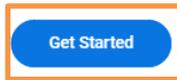
9. Use the drop-down menu to select either a Satisfactory or Outstanding rating for the employee. Then select Next.

10. On the Review and Submit page, confirm the rating and select Submit.

11. After the Memo Only PEP is completed, a display message will appear for the manager to provide comments, or skip this step.

Success! Event submitted

Up Next: Carla Foster | Provide Manager Review Comments | Due Date 12/05/2025

View Details

Open   **Skip**

12. The MEMO can be viewed and printed from the employee's Performance tab on their profile. To Print the document, select *Create New PDF.*

13. Select *Notify Me Later*.

Your request is being processed

You can continue to wait or choose to be notified later.

Notify Me Later

14. When the MEMO document is available, it can be found in your notifications 🔔.

ℹ️ Information: Creating a MEMO document can be done by **HR and Supervisors**. For employees to view, please download and attach the document through the *Maintain Worker Documents* process.

Notifications