Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

The Performance Review captures summary comments of your strengths and opportunity areas regarding how you have demonstrated the Geisinger Values and performed your job expectations, responsibilities, and goals. The review includes one overall rating and will be discussed between and acknowledged by you and your manager.

These are the five steps in the Performance Review process and are further explained in this job aid.

Step 1: Employee writes Self-Evaluation

Step 2: Manager writes employee's Performance Review

Step 3: Manager and employee meet to discuss the Performance Review

Step 4: Employee writes final comments and Acknowledges the Performance Review

Step 5: Manager writes final comments and Acknowledges the Performance Review

STEP 1: EMPLOYEE WRITES SELF-EVALUATION

Note: Confirm with your manager **if you are required to complete a self-evaluation** and if so, the timeframes to complete it.

Overall Navigation

Pencil – add/edit information in a section. (You can also click within a section to add/edit information.)
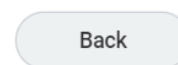
Back arrow - undo information entered in a section that hasn't been saved.

Check mark – saves information entered in a section

Back and Next Buttons – moves backward and forward between sections in the review and will save information entered into the current section.
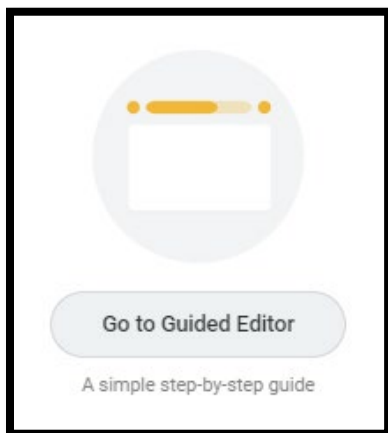
Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

Follow the steps to complete the Self-Evaluation.

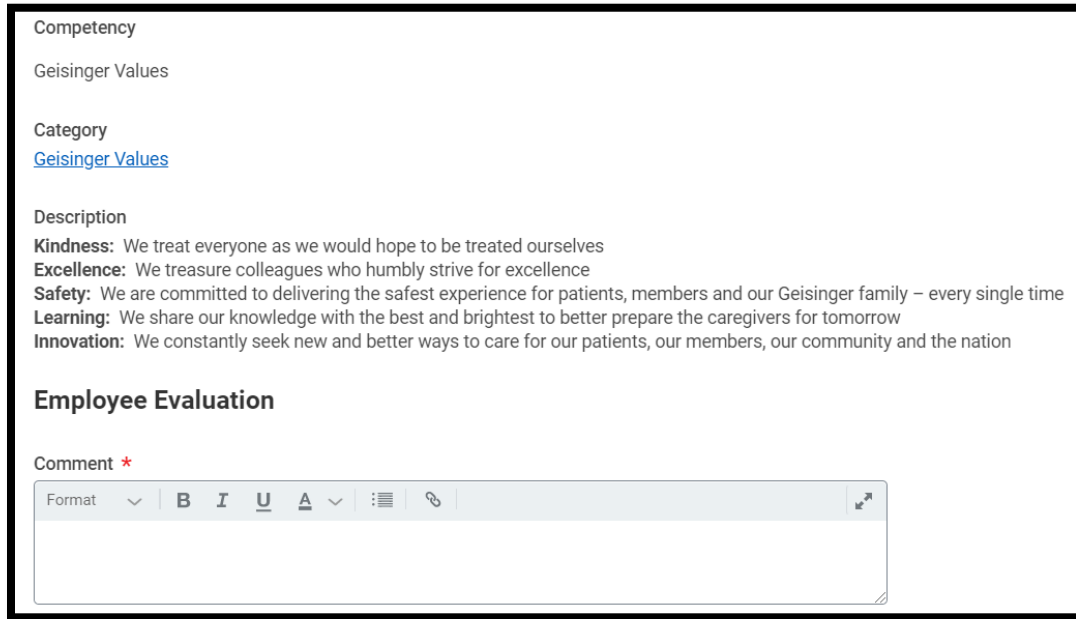1. Click on the Workday message to complete the Self Evaluation.
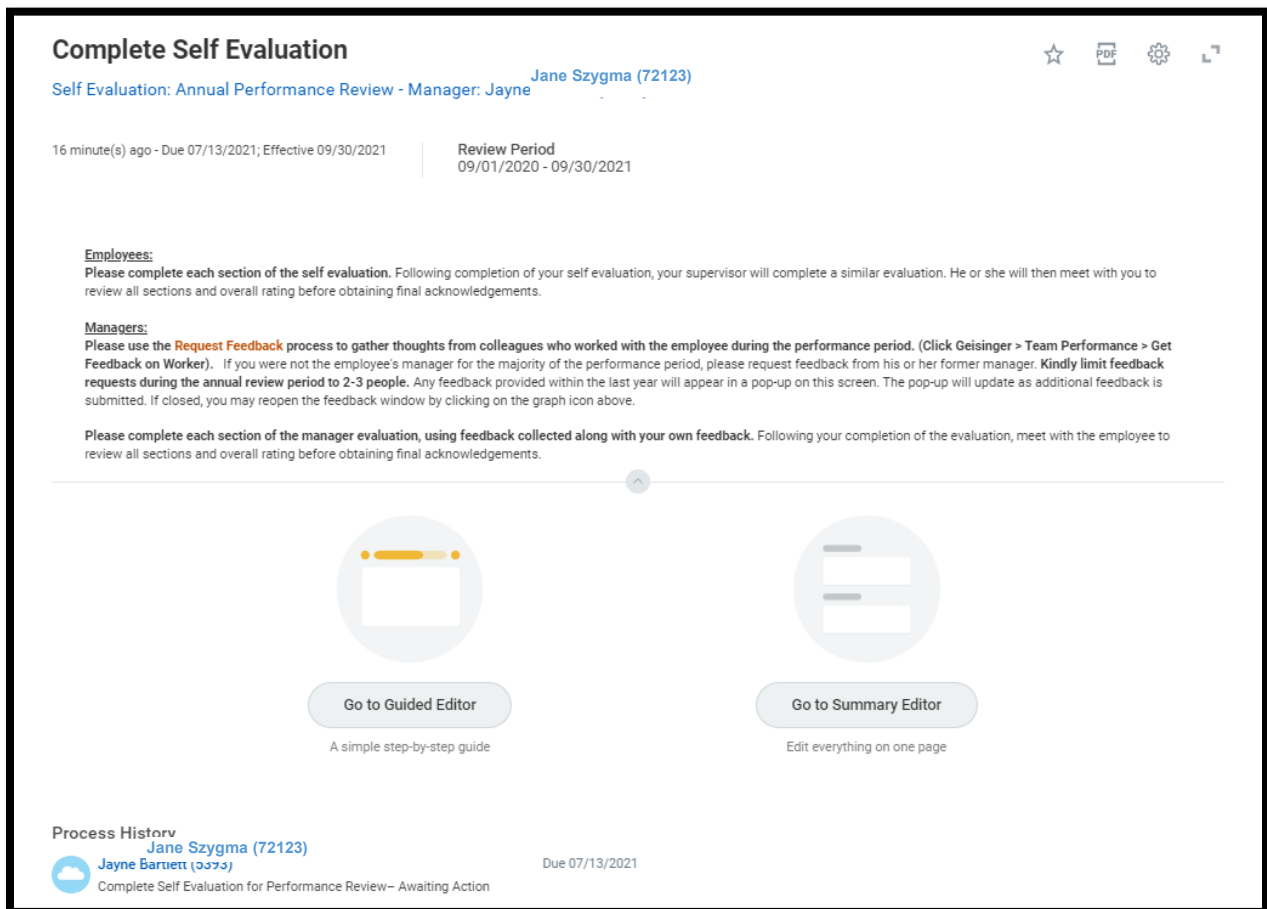
2. Click on **Go to Guided Editor**. (Recommended and steps outlined below.)
   Or click on Go to Summary Editor (optional) – outlines the entire review on one page and does not include section instructions.

Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

Section: **Geisinger Values**

3. In the **Comment box** (using the pencil icon or clicking in the box), provide a summary of how you have demonstrated the **Geisinger Values** and any opportunities for improvement.

Competency

Geisinger Values

Category
Geisinger Values

Description
Kindness: We treat everyone as we would hope to be treated ourselves
Excellence: We treasure colleagues who humbly strive for excellence
Safety: We are committed to delivering the safest experience for patients, members and our Geisinger family – every single time
Learning: We share our knowledge with the best and brightest to better prepare the caregivers for tomorrow
Innovation: We constantly seek new and better ways to care for our patients, our members, our community and the nation
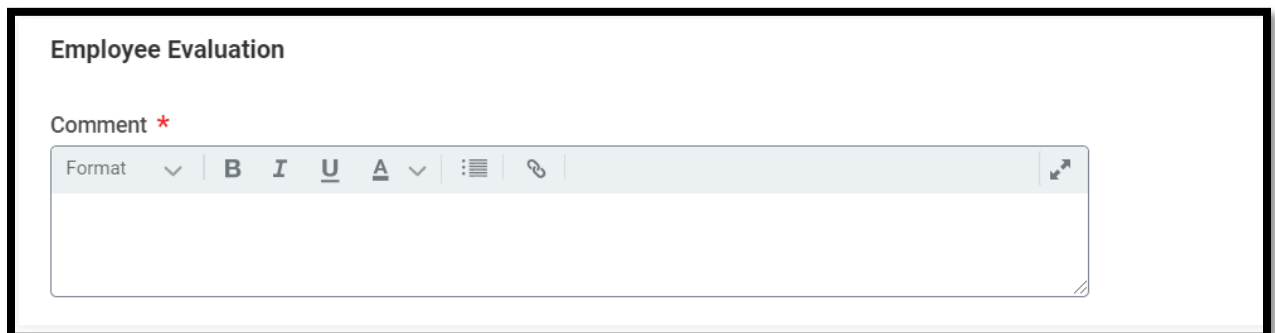
Employee Evaluation

Comment *

| Format ∨ | **B** *I* U A ∨ | ☰ | ⌗ |

4. Click Next.   Next

Section: **Job Responsibilities**

5. In the Comment box, provide a summary of the job specific responsibilities (technical competencies, accuracy, productivity, etc.) the employee has demonstrated well and those that can be developed further.
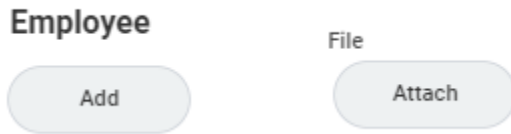
Employee Evaluation

Comment *

| Format ∨ | **B** *I* U A ∨ | ☰ | ⌗ |

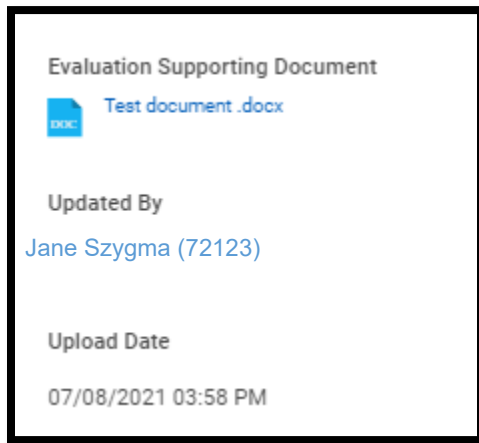## Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

OPTIONAL AND NOT REQUIRED – You can attach a brief (no more than one page) summary document regarding demonstration of job responsibilities.
Note: **DO NOT** include **PHI** (Protected Health Information) in the attachment.

6. To attach a document, click the **Add** button and then the **Attach** button.

Employee

Add

File

Attach

A pop-up box will appear and allow you to attach a document from your computer.

Evaluation Supporting Document
Test document .docx

Updated By
Jane Szygma (72123)

Upload Date

07/08/2021 03:58 PM

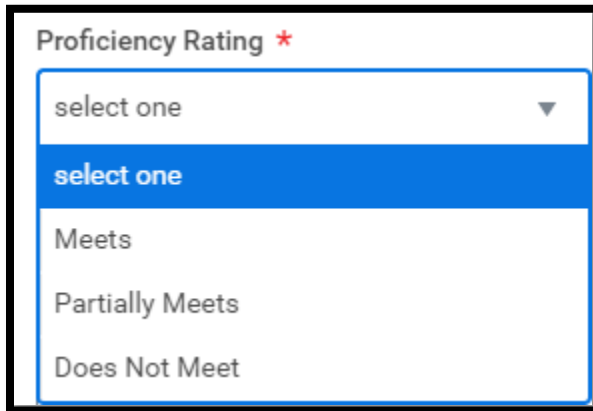7. Once done completing this section, Click **Next**.

Section: **Corporate Compliance**

8. Rate how you appropriately and consistently comply with all policies, procedures, legal, regulatory, and licensing requirements.
Click on the **Proficiency Rating** field name to enable the menu.

9. Select the rating from the drop-down menu.

Proficiency Rating *

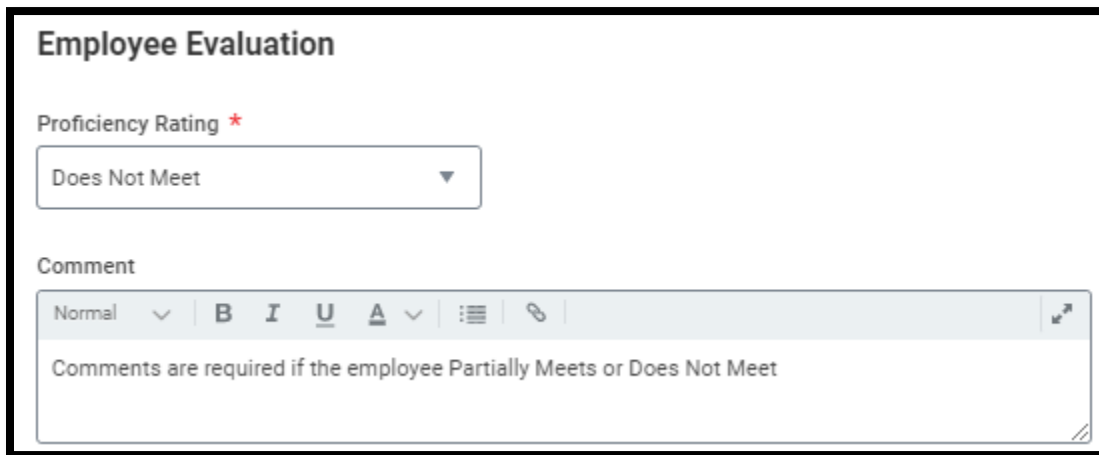| select one ▼ |
| --- |
| **select one** |
| Meets |
| Partially Meets |
| Does Not Meet |

10. A comment needs to be entered if you choose **Partially Meets** or **Does Not Meet.**

Employee Evaluation

Proficiency Rating *

Does Not Meet ▼

Comment

Normal ∨ | **B** *I* U A ∨ | ☰ | ⬚

Comments are required if the employee Partially Meets or Does Not Meet

11. Click **Next.**

Section: **This Year's Goals**

Note: Goals are **not required** to complete the review.

Goals **already displayed** on the form were approved by your manager and transferred from Workday for this review period (2021).
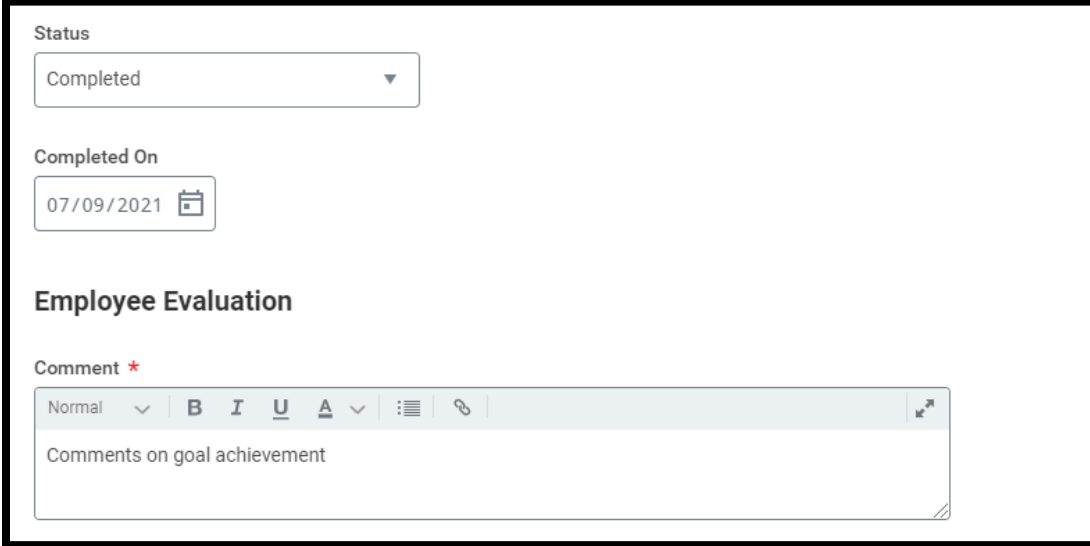
Learn more about setting goals in this job aid.

Updating Existing Goals

12. To update the goal, click the pencil icon to the right of the goal (or click within the

goal) to enter edit mode. Since these goals were previously approved, limit your edits to updating the status and entering comments.

Status

Completed ▼

Completed On

07/09/2021 📅

Employee Evaluation

Comment *

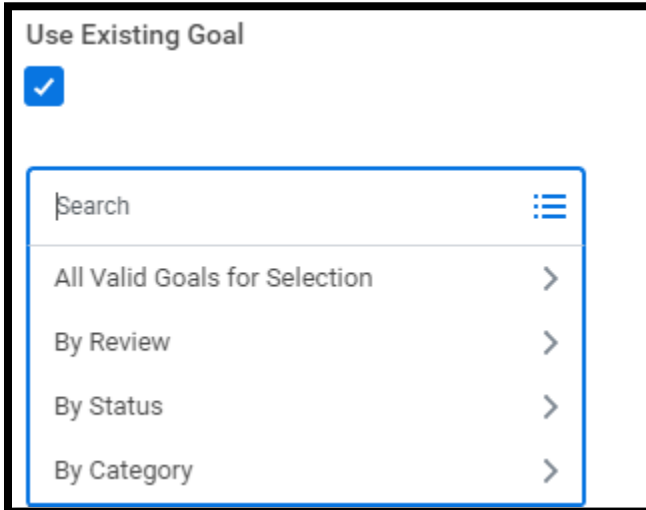| Normal ∨ | **B** *I* <u>U</u> **A** ∨ | ☰ | 🔗 | | ⤢ |

Comments on goal achievement

13. To save your edits, click the checkmark button to the right of the goal and continue to the next goal. (You can also click the pencil icon to the right of the next goal and begin editing and your changes will be saved on the previous goal.)

Adding Approved Goals

If goals were approved by your manager after the self-evaluation was generated, you can use the Add option to transfer goals from Workday.

14. Click the **Add** button and check the box next to Use Existing Goal.

Use Existing Goal

✓

| Search | ☰ |

All Valid Goals for Selection >

By Review >

By Status >

By Category >

Add

15. Search for available goals to add.

> Note: the goal must be in an approved status to transfer to the review. If you have 2021 goals in Workday that have not been approved, speak to your direct manager about approving your goals.

Adding Goals

If you need to add goals to the review, use the **Add** button and complete the outlined sections.

Goal *

| Format | B | I | U | A | ☰ | ⬗ |

Description

| Format | B | I | U | A | ☰ | ⬗ |

Category

[   ] ☰

Status

[select one   ▼]

Employee Evaluation

Comment *

| Format | B | I | U | A | ☰ | ⬗ |

- **Goal*** – title of the goal.

- **Description*** – specific details regarding how you will accomplish the goal (consider using SMART format: Specific, Measurable, Achievable, Relevant and Time-bound).

- **Category*** – the year associated with accomplishing the goal (example: performance reviews for 2021 should contain goals for 2021).

- **Status*** – In progress, completed, etc. If the goal is complete, you will be asked to enter a Completed Date.

- **Comment*** – information regarding your achievements associated with the goal.

*All goals entered on the form **require** a **Goal (title), Description, Category, Status and Comment.**

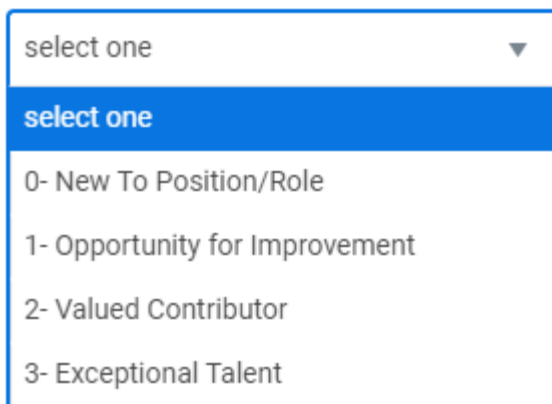**16.** When all goals have been added/updated and commented on, click **Next**.

Section: **Overall Self Evaluation**

17. Use the pencil icon or click under the Rating field to enter edit mode.

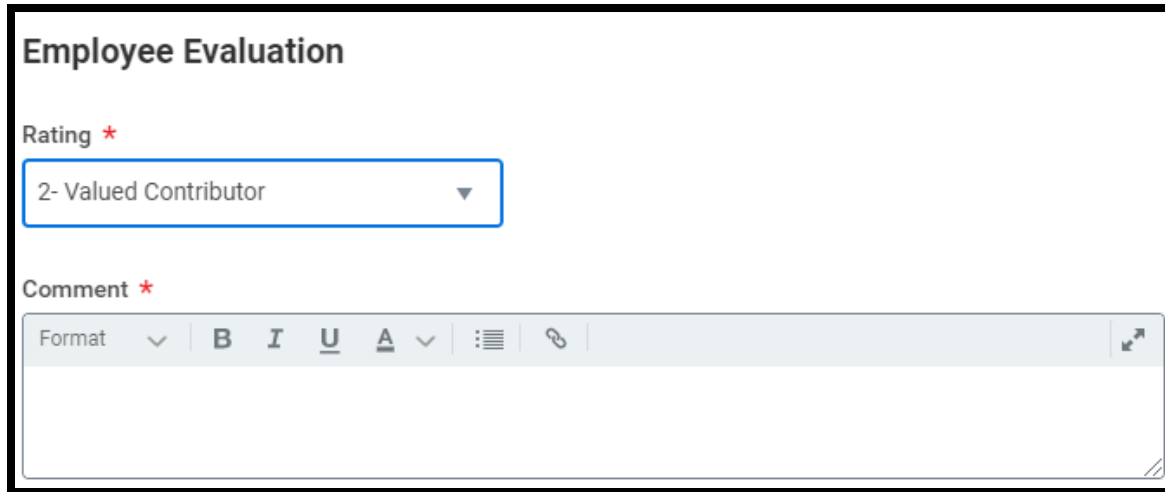**18.** Click the drop-down menu for the Overall Rating.

Employee Evaluation

Rating *

select one ▼
select one
0- New To Position/Role
1- Opportunity for Improvement
2- Valued Contributor
3- Exceptional Talent

New to Position/Role	Those who have not been in their current position/role long enough to give a complete assessment of their abilities. Generally, this will be within an employee's introduction/orientation period and not longer than six months of moving into a new role.
Opportunity for Improvement	Performance did not consistently demonstrate the results and/or competencies expected for the position and/or reasonable progress toward performance improvement goals was not made. A development plan to improve performance, including timelines, must be outlined and monitored to measure progress.
Valued Contributor	Performance consistently demonstrates the results and/or competencies expected for the position, at times exceeded some expectations and the overall quality of work was at a high level. (This is the expected performance level for an experienced employee in the position.)
Exceptional Talent	Performance demonstrated consistently exceeded the results and/or competency level for the position, and the quality of work was superior and made an exceptional or unique contribution in support of unit, department, or system objectives. Employee is sought out as a resource by others due to expertise.

19. Based on your performance for the entire performance period, select the rating that most accurately reflects your overall performance and enter overall comments.

20. Select a Rating and enter overall comments.

Employee Evaluation

Rating *

2- Valued Contributor ▾

Comment *

| Format ▾ | **B** *I* U A ▾ | ☰ | ⬗ | | ⤢ |

21. Click **Next**.

Section: **Summary**

The last section is a summary view of all the sections you completed.

22. Additional Edits Required: click the Guide Me button on the right side of the section to make any edits.

You can choose **Save for Later or Close**, which allows you to return to the form at a later time to review the content and submit.

No Edits Required: click the **Submit** button at the bottom of the form.

Submit   Save for Later   Close
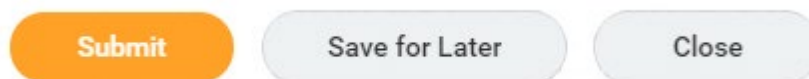
Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

23. When you submit the self-evaluation, you will see this pop-up message indicating the review is now with your manager.
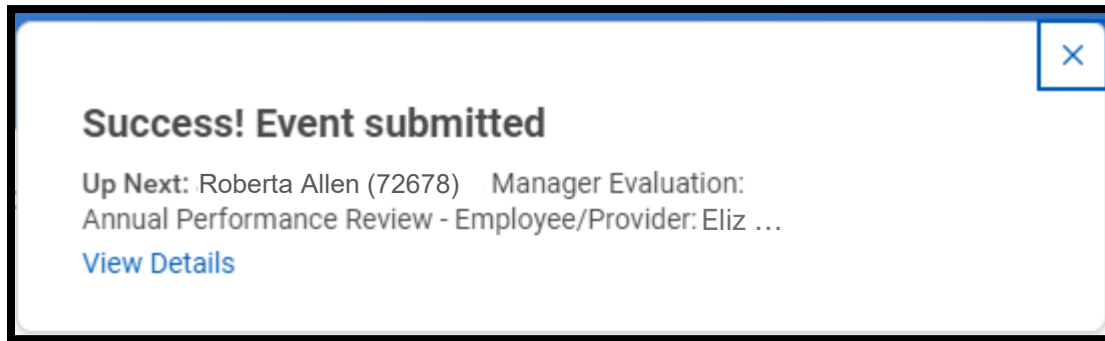
STEP 2: MANAGER WRITES EMPLOYEE'S PERFORMANCE REVIEW

Your direct manager will complete your performance review.

STEP 3: MANAGER AND EMPLOYEE MEET TO DISCUSS THE PERFORMANCE REVIEW

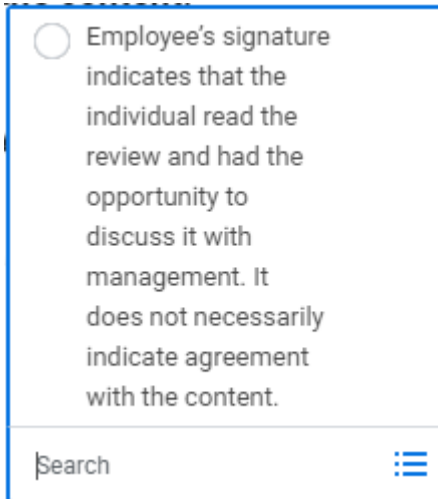You and your manager will meet to discuss the review and overall rating.

Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

STEP 4: EMPLOYEE WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW

Your manager will send the review to you for your Acknowledgement and final comments.

You will receive a task in your Workday Inbox to complete your performance review.

24. Click on the Workday message to acknowledge the review and add any final comments.

25. Once in the task, click on the Employee Acknowledgement field name to enable the menu.

26. From the Status section, click on the radio button indicating that you have read the review and your manager has discussed it with you.
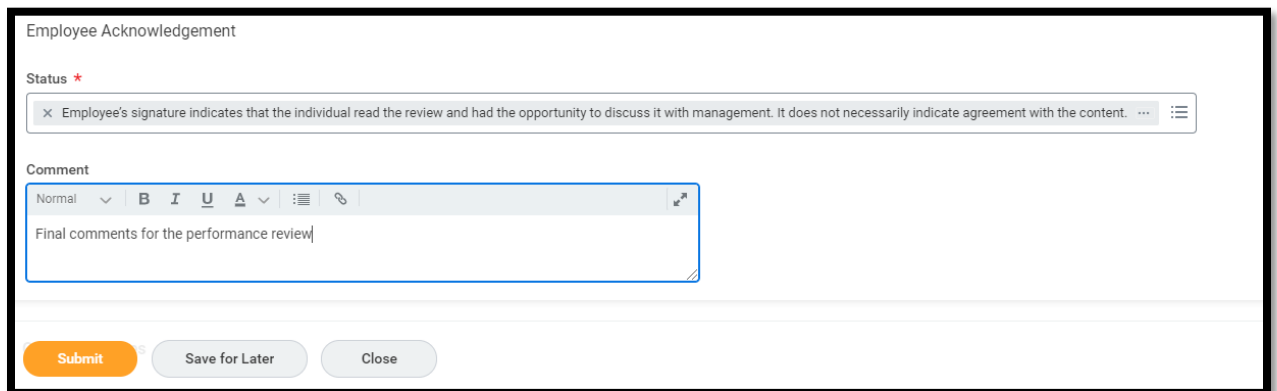

Note: Your acknowledgement does **not** indicate that you agree with the content.
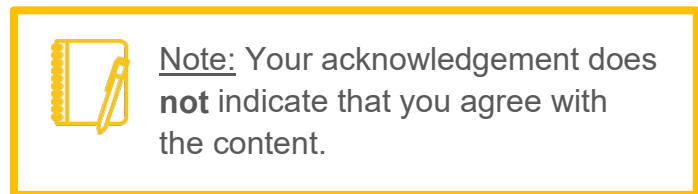
Although not required, you can enter any final comments in the Comment box.

27. If you are finished with the review, click the Submit button. If you want to go back to review and submit later, choose Save for Later/Close.

28. When you submit, you will see this pop-up message:

Success! Event submitted

Up Next: Roberta Allen (72678), Provide Manager Review Comments

View Details
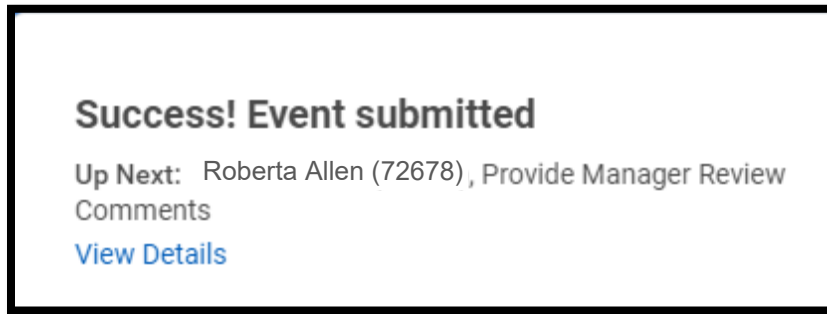
STEP 5: MANAGER WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW

Your performance review has now been returned to your manager for their final Acknowledgement.

Annual Performance Review: Self-Evaluation (Employees, Providers, or Managers)

REVIEWING COMPLETED PERFORMANCE REVIEWS

Once your Performance Review has been completed, you can view your review at any time in Workday.

1. From your Workday homepage, select **Talent and Performance**.

2. From the next screen on the right under Performance, select Reviews.
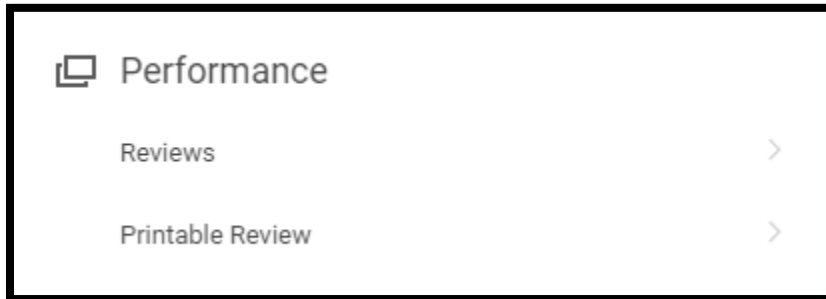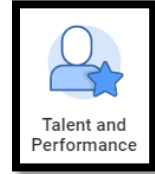
3. From your Completed list, you can View the performance review on your computer or you can Create a PDF and print it and/or save it outside of Workday.

Note: When you print or save a copy of the performance review outside of Workday, attachments are not automatically included. You will need to print and/or save attachments separately.

Also, Comments in the Job Responsibilities section aren't included when you print and/or save a PDF copy of the performance review. To save and/or print these Comments outside of Workday, you will need to capture a screenshot of the comments. Alternately, you can drag your mouse over the comments on the screen and press Ctrl-C to copy, then paste the text into another program (such as Word) by pressing Ctrl-V.