

Performance Review : Completing the Manager Review

The **Performance Review** is a tool in the [Employee Feedback Cycle](#) used to evaluate an employee's overall performance, usually on an annual basis. The intent of this tool is to help identify the employee's strengths, opportunities for development, and provide constructive feedback about their performance.

Geisinger's performance review includes sections for you to rate the employee and provide comments in the categories of Geisinger Values and Corporate Compliance and job responsibilities, as well as provide progress updates on goals. Leadership performance reviews will include an additional rating section specific to Geisinger competencies.

The review includes a self-evaluation and manager review component and results in one overall rating discussed between and acknowledged by both the employee and the manager.



Note: If you are a manager and are completing your own Self-Evaluation, refer to the [Self-Evaluation job aid](#) instead.

There are the four steps in the Performance Review process:

Step 1: [Employee writes Self-Evaluation](#)

Step 2: [Manager writes employee's Performance Review & meets with the employee](#)

Step 3: [Employee writes final comments & Acknowledges Performance Review](#)

Step 4: [Manager writes final comments & Acknowledges the Performance Review](#)

OVERALL NAVIGATION

Back – moves to the previous section in the review and saves any information entered in the current section.



Next – moves to the next section in the review and saves any information entered in the current section, if applicable.



Save for Later – saves information entered in the review and closes the task. You can re-open the review to make edits, complete unfinished sections or submit.



Close – closes the review without saving any recent changes. If you utilize this option, you receive an additional pop-up asking are you sure you want to discard any changes.



Submit – submits the review and moves it to the next step in the process and the form can no longer be changed/edited.



*Need help? Click on our **Smart Tips** icons for assistance throughout the performance review.*



For Rating Instructions

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EMPLOYEE WRITES THE SELF-EVALUATION (STEP 1)

- If you are **requiring your employee to complete their self-evaluation**, share completion time frames with them to make sure you have adequate time to complete your portion of the review.
- **YOU ARE UNABLE TO BEGIN** the employee's performance review until the employee's self-evaluation is completed.
- If you **are not requiring your employee to complete a self-evaluation**, refer to the **Manually Advance a Performance Review** section of the [Manage Performance Review Tasks - Manager](#) job aid for instructions on how to move the form forward to complete your portion of the process.



Note: Any **self-evaluations** that are **not completed by a designated date** (refer to annual Performance Review Communications for specifics), will be **moved forward** to the manager step by Workday. If you want your **employee to complete the self-evaluation after this designated date**, refer to the **Send Back a Self-Evaluation to an Employee** section of the [Manage Performance Review Tasks - Manager](#) job aid and return the form to the employee to complete the self-evaluation.

MANAGER WRITES EMPLOYEE'S PERFORMANCE REVIEW (STEP 2)

Once the employee submits the self-evaluation (or the self-evaluation is moved forward), **you will receive a Complete Manager Evaluation task** in your Workday inbox to complete the employee's Performance Review.



Note: Any comments/ratings completed by the employee during the self-evaluation steps will usually be indicated to the right of your comment/rating areas.

Manager Summary	Employee Summary
Comment * Normal B I U A : Manager adds comments here	Comment Employee comments are here

1. Select the **Complete Manager Evaluation** task in your Workday inbox.

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2. Click on  button to begin the review.



Note: If your employee **received any feedback captured in Workday** during the performance period, their feedback will pop-up when you start the review. You can also access the feedback through the navigation menu on the left side of your screen that outlines each section of the review. Click on the  icon and then the gear icon in the feedback summary to download it to Excel.

3. Complete the **Geisinger Values and Corporate Compliance** section by selecting a rating for each item listed.
4. Use the **Comment** box to summarize your employee's key strengths and opportunity areas demonstrated during the performance period. *If **Corporate Compliance** is rated **Partially Meets or Doesn't Meet**, comments are required to support the rating.*



IMPORTANT: Workday logs users out after 15 minutes of inactivity. Text added to the review that has not been saved will be erased.

5. Click **Next**.



Note: The **next step** for **Leadership positions** is the **Geisinger Competencies** section. Click [here](#) for additional details on how to complete the section. **Research evaluations will not have Job Responsibilities sections.** Click [here](#) for details on how to complete the Research sections.

6. Complete the Job Responsibilities Sections:



Note: Only **ONE** of the Job Responsibilities sections needs to be completed (Comments or Attachment).

Comments continue to [step 6a](#); **Attachment** proceed to [step 6b](#).

- a. Job Responsibilities Comments:
- Review your employee's comments** (if applicable) and in the Answer box, provide a summary of your employee's accomplishments and areas of needed improvement.
 - Click **Next**.
 - Click **Next** a second time through the Job Responsibilities Attachment section and proceed to [step 7](#).

OR

- b. Job Responsibilities Attachment:
- Click **Next** to bypass the Job Responsibilities Comments section.



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11. Use the **Review and Summary** screen to confirm accuracy and completeness of the review.
12. From the **Review and Summary** Screen you can:
 - a. **Save for Later:** saves your changes and allows you to review the content and submit the form later. **This option should be used until you have the performance conversation with the employee. If you Submit, the employee will be able to see the content of the form and you can no longer make edits.**
 - b. **Submit: Do Not submit the performance review until after you have discussed the review with your employee.** By selecting “Submit,” the performance review moves to the next step in the process (Employee Acknowledgement) and changes/edits can no longer be made to the form.

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EMPLOYEE WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW (STEP 3)

Once returned to the employee, they need to Acknowledge the performance review discussion and add any final comments.

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MANAGER WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW (STEP 4)

When the employee has completed their Acknowledgement and submitted the form, it will route back to you for final Acknowledgement.

1. Click the Acknowledgement task in your Workday inbox.
2. Click  button.
3. The **Summary** section provides a side-by-side view of both the self- and manager evaluation. This is a final version of the performance review and no additional changes may be made.
4. Click **Next**.
5. Select the List icon  in the Status field.
6. Select the **Manager's Signature** statement.
7. Use the **Comment** box to provide any final comments.
8. Click **Submit**.
9. The performance review is now successfully completed.

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LEADERSHIP POSITIONS ONLY: GEISINGER COMPETENCIES SECTION

1. Complete the **Geisinger Competencies** section of the review.
 - a. Select a rating that accurately reflects the employee's demonstration of the expected behaviors for each competency based on their **Stage of Contribution**:
 - i. **Stage 3 Contribution: Contributes through Others** (Titles: Supervisor, Manager, Director, and Senior Director)
 - ii. **Stage 4 Contribution: Contributes Strategically** (Titles: AVP/Medical Executive, VP/Institute Chair, C-Level Executive, EVP, and CEO)
2. Provide a response summarizing key strengths and areas for opportunity in the **Comment** box.
3. Click **Next**.
4. Resume Manager Writes Review, [Step 6 above](#). If the self-evaluation is a research form continue the with Research Positions Only section below.

RESEARCH POSITIONS ONLY: QUESTIONS & SUPPORTING DOCUMENTATION

1. Complete the **Questions** section of the self-evaluation:
 - a. Review your employee's responses to the questions (if applicable) and provide your comments in the **Answer** text box.
 - b. Click **Next**.
2. Complete the Supporting Document section of the self-evaluation:
 - a. **Review the employee's summary** outlining their research accomplishments and list of papers published or in the press during the performance period. You can also attach a summary of your employee's accomplishments and areas of needed improvement.
 - b. Click **Select Files** button or drag-and-drop to the **Drop files here** space to attach an external document with a summary of research accomplishments and list of papers published or in the press during the performance period.

File Formats: MS Word, MS Excel, or PDF file.
3. Click **Next**.
4. Resume Manager Writes Review, [Step 7 above](#).

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APPENDIX:

Rating Scale & Definition:

Rating	Definition
Exceptional Performance	Demonstrated performance consistently exceeded the standard results and/or competencies expected for the position and the quality of work was superior and made an exceptional or unique contribution in support of team, department, or organizational objectives. Employee is sought out as a resource by others due to expertise and the quality and quantity of the work is easily recognized as exceptional .
Exceeding Expectations	Demonstrated performance consistently met and occasionally exceeded the results and/or competencies expected for the position and the quality of work was at times above expected levels of performance. The employee consistently contributed to the success of the team, department and/or organization.
Meeting Expectations	Demonstrated performance effectively and consistently achieves the results and/or competencies expected for the position and the overall level of performance meets all position requirements. (This is the expected performance level for an employee in the position.)
Developing in Position	Unable to provide a full assessment of all aspects of the current position or demonstrated performance was inconsistent in achieving results and/or competencies for the position but working towards acquiring the necessary skills and knowledge. (Rating intended for current employees who transitioned into a new role within the last 6 to 12 months.)
Underperforming in Position	Demonstrated performance did not achieve the results and/or competencies expected for the position and/or reasonable progress toward performance improvement goals was not made. A plan to improve performance , including timelines, must be outlined and monitored to measure progress.

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