

Performance Reviews: Manager

HOW TO REASSIGN A PERFORMANCE REVIEW

Within each step of the Performance Review process that results in a task being assigned to the manager, the review will be routed based on the current manager in Workday. These steps include:

- Employee submits the self-evaluation or self-evaluation is moved forward and the manager is assigned the task to complete the performance review.
 - The employee re-submits the self-evaluation after it has been returned by the manager (optional).
- Employee writes final comments/acknowledges the review and submits to the manager for their final comments/acknowledgement.

If you were **not the employee's primary manager for the majority** of the performance period **AND** you **do not have enough information** to complete the review or you **did not complete the previous manager step** in the process, you can reassign the performance review to another manager.



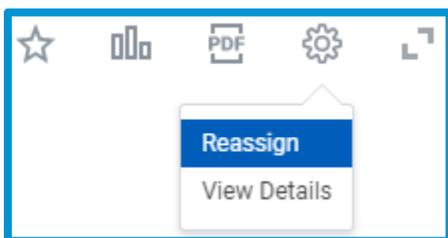
Note: You will need to reassign the form for each manager-related task in the performance review process as outlined above.

1. From your Workday inbox, select the performance review task



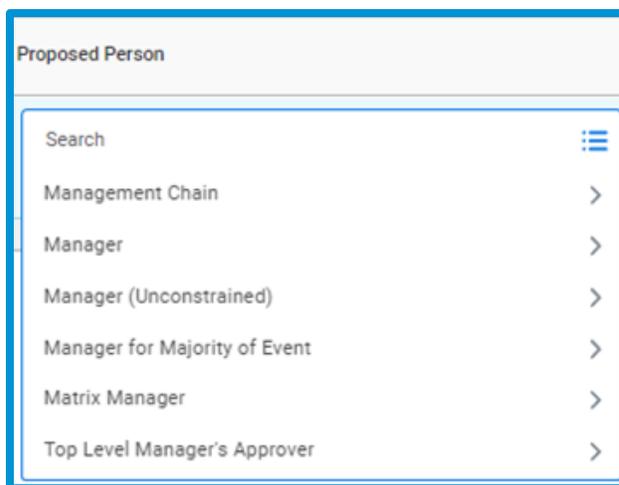
Note: the performance review needs to be with the manager to complete the reassignment step. If the performance is still in the self-evaluation step, refer to the [Move Self-Evaluation Forward](#) job aid.

2. Within the task, click on the cog in the upper right corner of the task and click **Reassign**.



Performance Reviews: Manager

3. A new task window will open. Click the drop-down menu in the Proposed Person box to identify the reassigned manager.



To select the reassigned manager, use one of the following options:

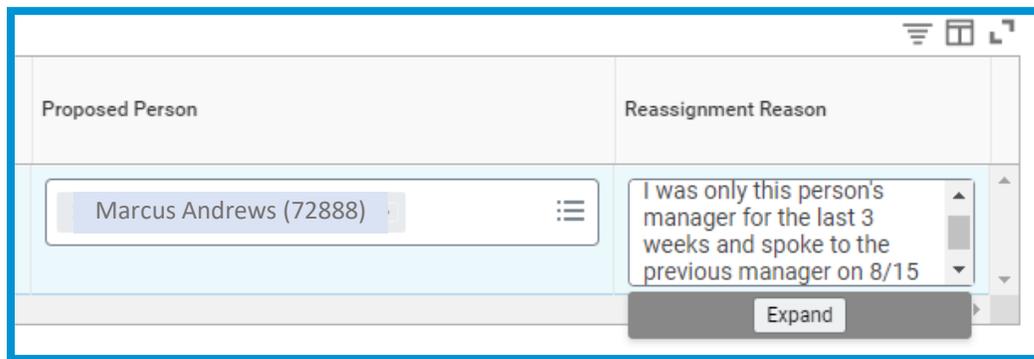
- From the **Search menu**, type in the manager's name.
- **Management Chain** – you and any managers above you in your management structure. (If the employee has an Additional Manager, the Additional Manager along with any manages above them will be listed).
- **Manager for the Majority of the Event** – the manager who the employee reported to for the majority of the performance period



Note: It is **important** that you **notify the manager you selected for reassignment**. The manager will **not receive any notification outside of Workday** and therefore you need to let them know this task is reassigned to them since **you are ultimately responsible for making sure the review is completed**.

4. Once you select the reassigned manager, you **must include comments**. These comments should **explain why you are reassigning the form** and the **date you informed the reassigned manager**. The task is **submitted to the Workday Administration for approval and comments will assist in the approval process**.

Performance Reviews: Manager



The screenshot shows a table with two columns: "Proposed Person" and "Reassignment Reason". In the "Proposed Person" column, there is a dropdown menu with "Marcus Andrews (72888)" selected. In the "Reassignment Reason" column, there is a text box containing the text: "I was only this person's manager for the last 3 weeks and spoke to the previous manager on 8/15". Below the text box is an "Expand" button.

Proposed Person	Reassignment Reason
Marcus Andrews (72888)	I was only this person's manager for the last 3 weeks and spoke to the previous manager on 8/15

5. Click **OK**.

The Workday **task will not be removed from your Workday inbox until it is approved. Once approved**, the task will be removed and the reassigned manager will have the task in their Workday inbox.

As the reassigned manager completes additional steps in the performance review process, **each manager-related step will need to be reassigned**.