

## Performance Review: Completing the Self-Evaluation

The **Performance Review** is a tool in the [Employee Feedback Cycle](#) used to evaluate your overall performance, usually completed on an annual basis. The intent of this step of the feedback cycle is to help identify your strengths, opportunities for development, and receive constructive feedback about your performance from your manager.

Geisinger's performance review includes sections to rate yourself 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 their manager.

There are four steps to the **Performance Review**:

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

**Step 2:** Manager Evaluation of Performance & Meets with Employee

**Step 3:** [Employee Acknowledgement & Final Comments](#)

**Step 4:** Manager Acknowledgment & Final Comments



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

### 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 are 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 Self-evaluation.*

Back

Next

Save for Later

Close


Submit



For Rating Instructions

# Performance Review: Completing the Self-Evaluation

## COMPLETE SELF-EVALUATION (STEP 1)

1. Select the **Complete Self Evaluation** task in your Workday inbox.
2. Click  button to begin the evaluation.



Note: The left side of your screen has a navigation menu that outlines each section of the review.

3. Complete the **Geisinger Values and Corporate Compliance** section by selecting a rating for each item listed.
4. Use the **Comment** box to summarize key strengths and opportunity areas demonstrated during the performance period. *Comments are **required** to support your selected rating.*



IMPORTANT: Workday logs users out after 15 minutes of inactivity. Text added to your self-evaluation that has **not been saved** will be lost.

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 Section:



Note: Complete only **ONE** of the Job Responsibilities sections of the self-evaluation (Comments or Attachment).

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

- a. Job Responsibilities Comments:
  - i. Use the **Comment** box to summarize your accomplishments and areas of needed improvement.
  - ii. Click **Next**.
  - iii. Click **Next** a second time through the Job Responsibilities Attachment section and proceed to [step 7](#).

**OR**

- b. Job Responsibilities Attachment:
  - i. Click **Next** to bypass the Job Responsibilities Comments screen.
  - ii. Click **Select Files** button or drag-and-drop to the **Drop files here** space to attach your accomplishments and areas of needed improvement external file.  
*File Formats: MS Word, MS Excel, or PDF file.*
  - iii. Click **Next**.




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### 7. Updating Goals:

#### a. Transferred Goals from Workday:

- i. Confirm the **Goal** and **Description** details are correct.
- ii. Confirm the **Category/Supports sections** reflect the current year of the review cycle.
- iii. Update the **Status** of the goal if needed. If the **Status is Completed**, it will need a **Completed on date**.
- iv. Use the **Comments** section to provide a summary of your results and achievements associated with the goal.

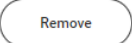
#### b. Recently Created Goals not automatically included in your self-evaluation:

- i. Click the **Add** button.
- ii. Click the **List** icon  in the **Add Existing** field and select an existing goal to import into your self-evaluation.
- iii. Update the **Goal, Description, Category, Supports, Status, Dates,** and **Comments** as needed.

#### c. Create New Goals for your self-evaluation:

- i. Use the **Add** button.
- ii. **Complete all sections** for each added goal.

#### d. Remove Goals that no longer apply to your role or were added in error:

- i. Use the  button below the goal to **permanently delete** the goal from your self-evaluation.



**IMPORTANT: Do not add goals for the next calendar year to your self-evaluation.** The self-evaluation is intended to evaluate performance for the current calendar year. Goals for the next calendar year will be added to the Goals section of Workday through a separate process.

### 8. Click **Next**.

### 9. Complete the Overall section:

- a. Select a **Rating** and add a **Comment** to support the selected overall rating. For additional details about the Rating Scale, click [here](#).

### 10. Click **Next**.

### 11. Use the **Review and Summary** screen to confirm accuracy and completeness of your self-evaluation.

### 12. Click **Submit**.



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Note: Once you submit, the performance review can no longer be edited and the form routes to your manager.

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### EMPLOYEE ACKNOWLEDGES & FINAL COMMENTS *(STEP 3)*

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 your Performance Review and no additional changes may be made.
4. Click **Next**.
5. Select the **List** icon  in the **Status** field.
6. Select the **Employee's Signature** statement.
7. Use the **Comment** box to provide any final comments.
8. Click **Submit**.



Note: Once you submit your acknowledgement, it will route to your manager to complete the same acknowledgement step. A finalized version of your Performance Review will save to your Workday profile.

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### LEADERSHIP POSITIONS ONLY: GEISINGER COMPETENCIES SECTION

1. Complete the **Geisinger Competencies** section of the self-evaluation.
  - a. Select a rating that accurately reflects your demonstration of the expected behaviors for each competency based in your **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 Complete Self-Evaluation, [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. Provide a response to each question in the **Answer** text box.
  - b. Click **Next**.
2. Complete the Supporting Document section of the self-evaluation:
  - a. 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 Complete Self-Evaluation, [Step 7 above](#).

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APPENDIX:

**Rating Scale & Definition:**

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

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**FAQ:**

1. My self-evaluation will not submit.
  - Confirm all fields of your evaluation submission with a red asterisk (\*) have been updated.
  - Confirm the following Goals fields have been completed/updated for each goal present on your review:
    - **Goal (title)**

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- **Description**
- **Category** (Strategic Priority)
- **Supports** (Strategic Plan – Enterprise Scorecard Key Result)
- **Status** (Completed or Not Completed)
- **Completed On** – *only appears if you select the Status of Completed* and refers to the date you completed your goal.
- **Comments**

### 2. I added text comments to the comment section, but they **didn't save**.

- Workday automatically logs users out after 15 minutes of inactivity on a given screen to protect sensitive information maintained in the system. If you have not used the “Save for Later” button or advanced your form to the next screen, your text entry may not have saved during a forced logout.
- If you are concerned about data loss while updating your self-evaluation, consider:
  - Drafting your responses in MS Word document and copy/pasting them into the form.
  - Using the *Save for Later* button at the bottom of the screen; or
  - Advancing to the next screen before stepping away from you self-evaluation.

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