

Performance Reviews: Manage Performance Reviews

MANAGER GUIDE: COMMON PERFORMANCE REVIEW TASKS

This guide was created to assist managers with common action tasks related to the Performance Review process in Workday. Included in this guide is instructions to **Reassign a Review** to a different manager, **Manually Advance** self-evaluation, and **Send Back** a review to the employee for additional updates.

In all instances, a justification comment is **required** to submit.

There are three steps to manage a **Performance Review**:

[Reassign a Performance Review](#)

[Manually Advance a Self-Evaluation](#)

[Send Back a Self-Evaluation to the Employee](#)

REASSIGN A PERFORMANCE REVIEW

You can **Reassign** the a review for **Step 2 Complete Manager Evaluation for Performance Review** and **Step 4 Provide Manager Review Comments** tasks if you:

- **Weren't the manager for the majority** of the performance period (the current calenda year); or
- Did **not complete** the previous manager step (example: you did not complete the Manager Review and you receive a task to complete the Manager Acknowledgement)
- If you are an **individual contributor** (no longer in a manager role) and **unable to complete performance reviews** in Workday.

Helpful Tips:

- **Do not** use the Reassign option to **send back** the performance

review to the **employee**. Refer to the [Send Back a Self-Evaluation to the Employee](#) section of this job aid.

- The performance review needs to be reassigned **twice** during the process – **Step 2 Complete Manager Evaluation for the Performance Review** and **Step 4 Provide Manager Review Comments**.
- Reassignment requests must be **approved** by a Workday Administrator. The task will **remain in your Workday inbox until it is Approved**.
- Reassignment requests **require justification** in the comments to be approved. Requests submitted with **missing or vague** notes will be **denied**.
 - **Acceptable:** Transferred to my team on Sept. 1 and the previous manager was the manager for the majority of review period. No longer in a manager role, reassigning to the current manager.
 - **Unacceptable:** Reassign. Not my employee. Transfer.

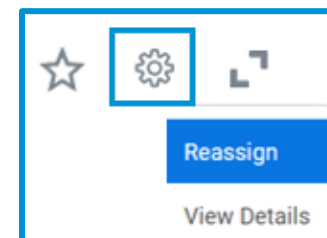
FROM YOUR WORKDAY INBOX

1. Select the **Manager Review: Performance Review** task.



Note: For individual contributors (no longer in a manager role), the task will appear blank.

2. Click on the **Cog** icon at the top of the screen in the task window.
3. Select **Reassign**.



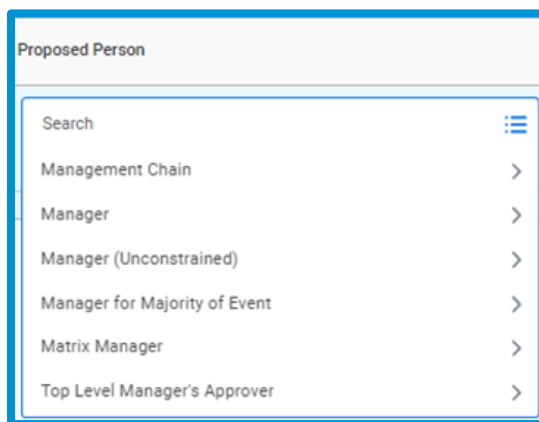
4. Click **List** icon  in the **Proposed Person** field to select a

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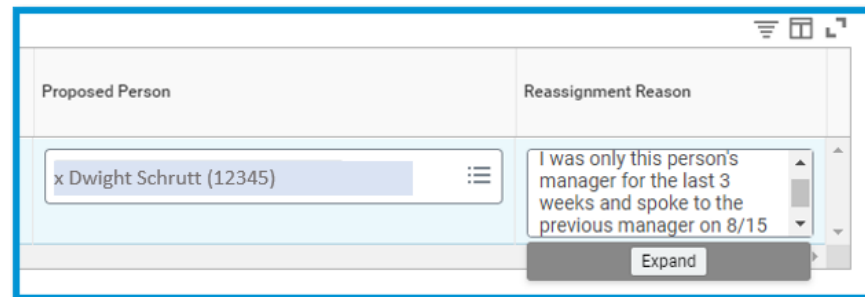
person from the drop-down list; or search the manager's name.

Use one of the following options to select a manager:

- Type in the manager's name in the **Search** field and select **Enter** on your keyboard.
- **Manager:** the employee's **current manager** (this is the option that should be selected by Individual Contributors (no longer in a manager role) reassigning reviews).
- **Management Chain:** You and any managers above you in your management structure. If the employee has an Additional Manager, that manager along with their management chain will appear on this list.
- **Manager for the Majority of the Event:** The manager the employee reported to for the majority of the performance period will appear on this list.



5. Add a **Reassignment Reason** in the provided field.
 - a. Comments must include relevant justification for the reassignment request. Generic and missing comments on requests will be denied by Workday Administrators.



6. Click **OK**.



Note: Once you click OK, the task will remain in your Workday inbox until it is approved for reassignment by the Workday Administrators. If it is denied, you will receive a notification.

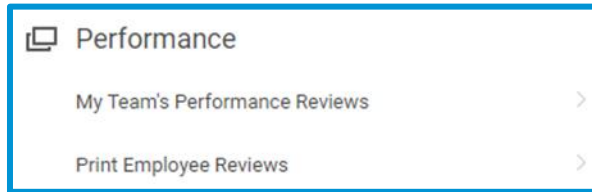
MANUALLY ADVANCE A SELF-EVALUATION

To ensure timely completion of Performance Reviews, managers can advance a pending Self-Evaluation task to the Manager Review stage on behalf of the employee. Although it is recommended that an employee completes their self-evaluation, it is not required.

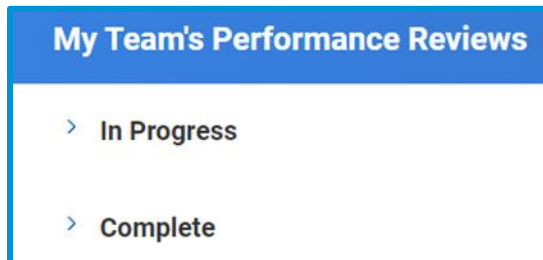
FROM YOUR WORKDAY HOME SCREEN

1. Click **View All Apps** from the **Your Top Apps** tile.
2. Select the **Team Performance** app from the Navigation menu on the left.
3. Select **My Team's Performance Reviews** under **Performance** on the right.

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- Click the > next to **In Progress** to view reviews that are **not yet completed**.

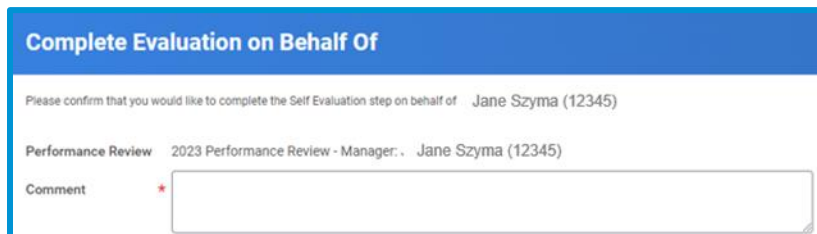


Note: The review must be in the **Complete Self-Evaluation – Initiation** step to manually advance to the Manager Review step.

- Click the **Complete on Behalf of** button next to the review.



- Use the Comment field to add a note with the reason for moving the self-evaluation forward. (e.g.: Self-evaluation is not required.)



- Click **OK**.



Note: The review will move to the **Complete Manager Evaluation** step and issue a performance review task to your Workday inbox for the employee.

SEND BACK A SELF-EVALUATION TO AN EMPLOYEE

This process allows a manager to send an employee's performance review back to the self-evaluation step for editing. This option should be used if you need the employee to provide additional information within the review, or the self-evaluation was advanced and the employee now needs to complete it.

A manager can send back a review from:

- Outside the performance review; and
- Within the review by using the **Send Back** button.

Helpful Tips:

- Employees cannot see manager ratings and comments when a review is sent back.**
- All ratings and comments** completed by the manager prior to the send back will be **saved to the review** and visible once the review is resubmitted.
- Goals** added by the manager **are visible** to the employee when the review is **sent back**.

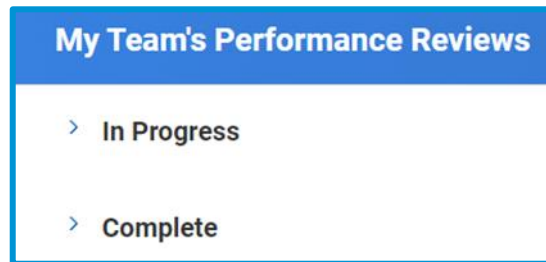
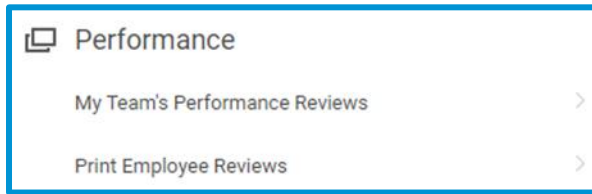
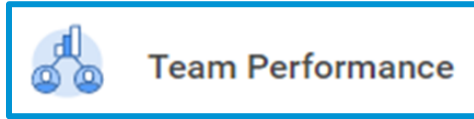


Note: Matrix Managers **must use** the [Send Back While Inside the Review](#) option to send a review back to the employee.

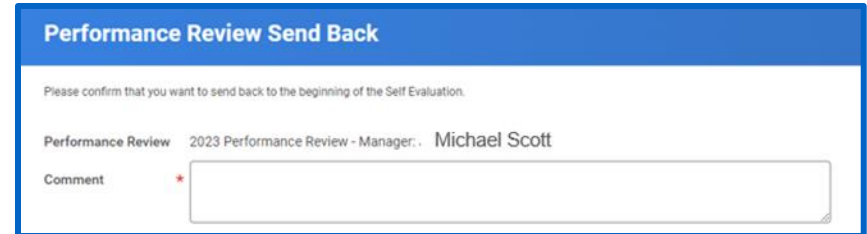
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SEND THE SELF-EVALUATION BACK WHEN OUTSIDE OF THE PERFORMANCE REVIEW

1. From your Workday apps, select **Team Performance**
2. From the next screen under **Performance** on the right, select **My Team's Performance Reviews**.
3. The **In Progress** section contains any reviews that are **currently not completed**. If needed, select the > before **In Progress** to expand the list.
4. The review must be in the current step of "**Complete Manager Evaluation – Initiation**" to send it back. Click the **Send Back** button.



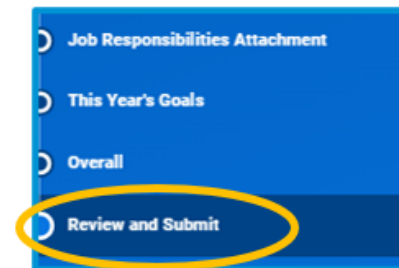
5. Another screen appears confirming if you would like to send back to the self-evaluation step. In the **Comment** box, indicate the **reason** you are sending the self-evaluation back. (For example: Employee needs to include additional information in the goals section)



6. Click **OK**. The performance review is moved to the "**Self-Evaluation – Initiation**" step and the employee will have a **task in their Workday inbox** to access the review.

SEND BACK WHILE INSIDE THE REVIEW WITH IN-PROGRESS MANAGER RATINGS / COMMENTS

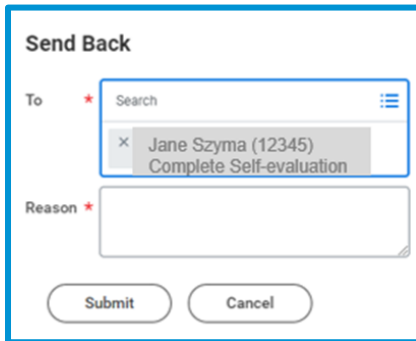
1. Open the Manager Evaluation: Performance Review task.
2. Select the **Review and Submit** from the review navigation menu on the left side of your screen.



3. Click **Send Back** button at the bottom of the screen.

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4. In the pop-up, the **To** field automatically defaults the employee's name.
5. Add a comment to the **Reason** field. Provide specific feedback as to why the review is being sent back (e.g.: Employee needs to include additional information in the Goals section).



The screenshot shows a 'Send Back' pop-up form. It has a title 'Send Back' at the top. Below the title, there is a 'To' field with a red asterisk, a search bar, and a dropdown menu. The dropdown menu is open, showing a selected item: 'Jane Szyma (12345) Complete Self-evaluation'. Below the 'To' field is a 'Reason' field with a red asterisk and a text area. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'.

6. Click **Submit**.