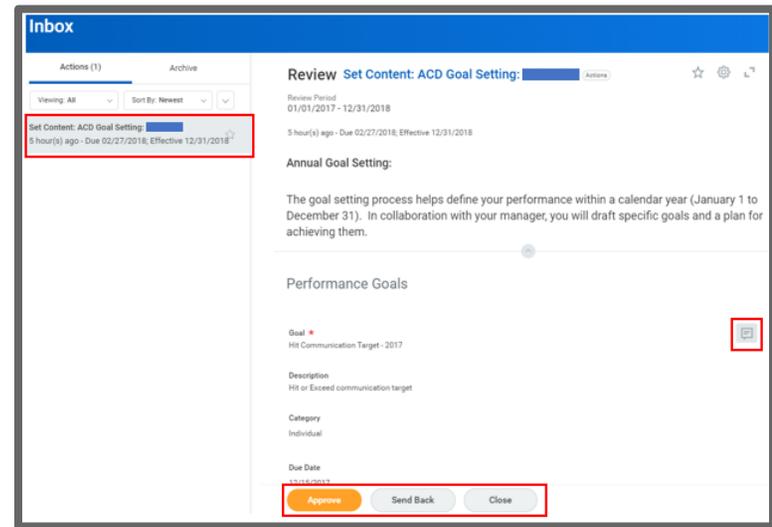


Managers complete annual evaluations of employees as part of the ongoing performance process.

Tasks

- [Review Goals](#)
- [Alignment Touchpoint](#)
- [Get Additional Manager Evaluation](#)
- [Give Additional Manager Evaluation](#)
- [Complete Manager Evaluation](#)
- [Manager's Manager Approval](#)
- [Manager Acknowledgment](#)
- [Nursing Clinical Ladder Revalidation](#)

4. Click **Approve** or **Send Back** if changes are being requested.
5. Click **Done**.



Screenshot 1: Image of Review Set Content page.

Review Set Content

At the beginning of the performance cycle, after the employee writes goals, managers receive an inbox task to **Review Set Content**.

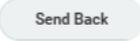
1. From the Inbox, click on the **Set Content** item under the **Actions** tab.
2. Review the employee's goals.
3. Add comments by using the **Comment** button  next to the goal or by clicking **Details**.

Alignment Touchpoint

At the mid-point of the performance year, Human Resources will send an inbox task to the employee to review their goals and log progress. Next, the manager will receive an inbox task to approve progress and hold a conversation with the employee.

1. From the inbox, click the **Manager Evaluation: Goal Alignment Touchpoint** task.
2. Select either **Go to Guide** or **Go to Summary Editor**.
3. Click on the first goal.



4. Review the employee's rating on the right side of the screen.
5. Edit the **Status** (if needed). If **No Longer Needed** is used, the goal will not appear on the year-end appraisal. Ensure the employee has a minimum of three goals or the year-end appraisal will not function until a third goal is added.
6. Click on the **Rating** field and select **On Track** or **Off Track**.
7. Enter **Comments**.
8. Click on each goal to add comments in the **Manager Evaluation** area.
9. After reviewing/commenting on each goal, click the Next button  .
10. On the **Overall** page, click the **Edit** icon  or click in the center of the screen to input a **Rating**. The employee's **Rating** will be to the right.
11. Select the **Rating** and click **Next**.
12. To request updates from the employee, click the **Send Back** button  and provide instructions. If no changes are needed, click the Submit button  .

information from secondary managers of dual employees or managers who have worked significantly with an employee. This task is not available for all employees.

13. From the inbox, click the **Get Additional Manager Evaluation** task.
14. To skip this task, click the **Gear** icon  in the upper right corner then, click **Skip This Task**.
15. To request input, enter the manager(s) name in the **Reviewers** field and click **Enter**.
16. Click **Submit**.

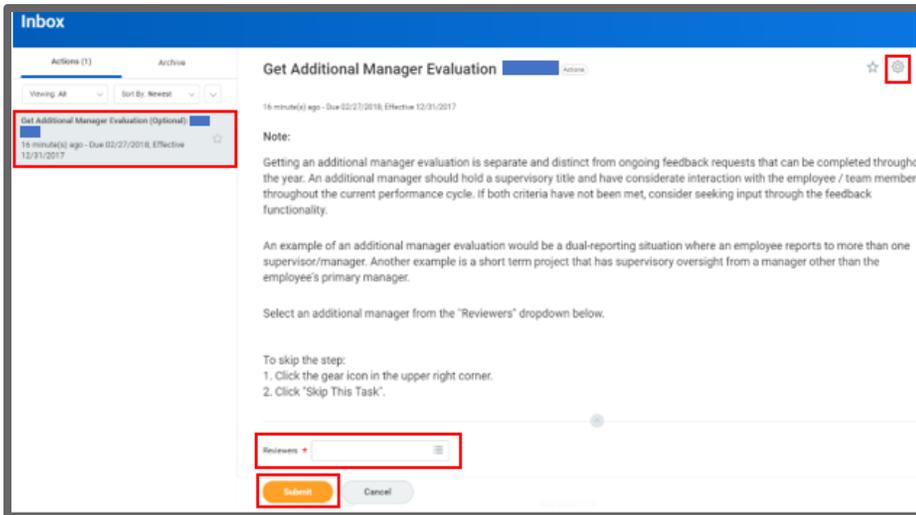
Get Additional Manager Evaluation

When HR initiates the year-end appraisal and the employee completes the self-evaluation, managers will receive an inbox task to **Get Additional Manager Evaluation**. This allows for additional

Give Additional Manager Evaluation

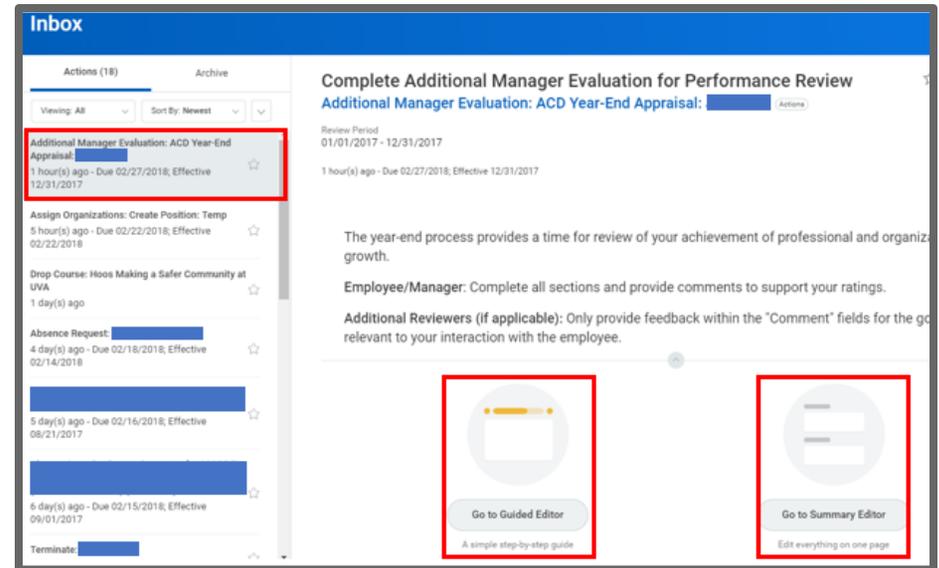
When a manager asks you to give feedback on an employee that is not your direct report, a **Get Additional Manager Evaluation** task will appear in your inbox.





Screenshot 2: Image of Get Additional Manager Evaluation screen.

1. From the inbox, click the **Additional Manager Evaluation** item.
2. Click **Go To Guided Editor** for a simple step-by-step guide, or **Go To Summary Editor** to edit everything on one page.
3. You will not rate the employee but can provide comments. Enter comments in the **Additional Manager Evaluation Comment** field. Provide comments only for goals relevant to your interactions with the employee.
4. Click **Submit**. A notification will be sent to the requesting manager.



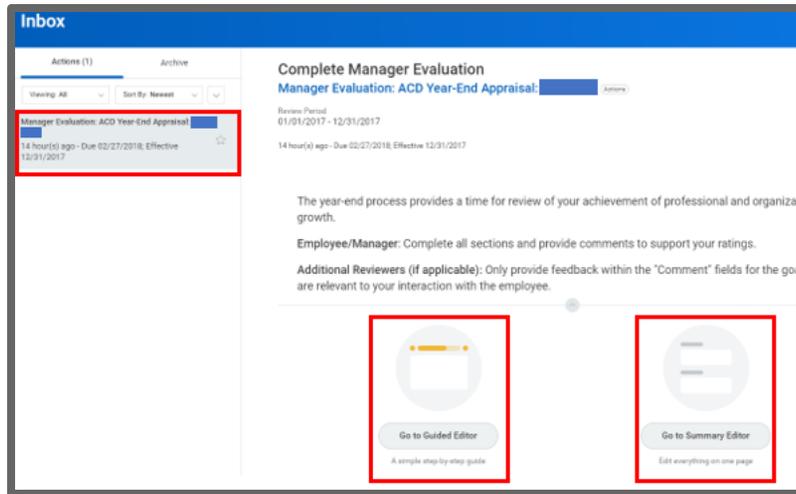
Screenshot 3: Image of Complete Additional Manager Evaluation screen.

Complete Manager Evaluation

Completing Manager Evaluation begins the final phase in the Performance Review process.

1. From your Inbox, click on the **Manager Evaluation** item.
2. Click **Go To Guided Editor** for a step-by-step guide, or **Go To Summary Editor** to edit everything on one page.





Screenshot 4: Image of Complete Manager Evaluation screen.

3. If you had requested an evaluation from a secondary manager of a dual employee, comments will be embedded in the evaluation but there will be no ratings.
4. Click on each **Goal** to view the employee's **Status**, **Rating** and **Comments**.
5. Enter a **Rating** and supporting **Comments** for each goal.
6. Click on the Summary box to view the employee calculated rating of all goals compared to your rating.
7. Click **Next**.
8. **Health System Managers Only:** Rate the employee on the **ASPIRE Values** by click each value section. **Comments** can be added in the **Summary** section.

9. Click **Next**.
10. **Medical Center Nurse Managers** only: The **Clinical Career Ladder Responsibilities** display. Click each **Responsibility** and enter a **Rating** and **Comment**, if applicable. Comments can also be added in the Summary section.
11. View **Feedback** from others and click **Next** to view any **Supporting Documentations** submitted by the employee.
12. Click **Submit**.
13. The Performance Review will be routed to the Manager's Manager for approval.

Manager's Manager Performance Approval

When a manager completes the employee's performance appraisal, it is routed to the next leader in the management chain for approval.

14. Click on the Workday inbox and find the **Review Manager Evaluation** task.
15. **It is not possible to edit or edit the employee's or manager's entries.**
16. Review each goals rating and manager/employee comments. Review any **Feedback** or **Supporting Documents** provided. Click on the **Overall** section at the bottom of the **Goal** section.
17. **If no changes are needed, click Approve.**
18. **If edits are needed, click Send Back.**



- a. Enter the managers name in the **To** field.
- b. Provide a reason the appraisal is being sent back.
- c. Click **Submit**.

Manager Acknowledgment

After the Manager's Manager has approved the Performance Review, you are required to acknowledge that you have conducted a formal review session with the employee.

- 1. Conduct the face-to-face review with the employee.
- 2. From the inbox, click on **Manager Evaluation**.
- 3. Click on the **Manager Acknowledgment** section, to open the **Status** field.
- 4. Click on the **Prompt** icon ☰ and select **Acknowledge**.
- 5. Click on the **Save** button ✓.
- 6. Click **Submit**.



Note: The employee will receive an item in their Inbox to acknowledge that they have had the opportunity to review the evaluation with you. Their acknowledgment does not imply agreement or disagreement with the content of the evaluation.

Nursing Clinical Ladder Revalidation

For managers with RNs who are on the clinical ladder, a final step will occur after the manager and employee have acknowledged the performance appraisal conversation.

- 1. Go to the inbox and locate the task **Clinical Ladder Revalidation: Employee Name**.
- 2. Select between the two options of the RN revalidating or not revalidating.
- 3. Click **Submit**.

Please select the revalidation level for this RN.

- Revalidates at current level
- Does not revalidate

Screenshot 55: Image revalidation options.

