

Career Conversation Entry in Workday

NOTE: All Career Conversation entries will appear in the employee's performance evaluation as Feedback.

Career conversations with your employees can happen anywhere and Workday lets you document the conversation from any device. Enter an abbreviated summary of a conversation on a phone or tablet and the summary will route to your inbox where you can expand on the details later. Reports can be run so managers can see who they have met with and who still needs a check-in on their career moves and aspirations.

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Using a PC

IMPORTANT: You are the person providing the feedback, so you must first send a feedback request to your Workday Inbox before entering the information.

1. Search **Get Feedback on Worker**. Click **My Team** and select the team member.
2. Enter your name in **Who do you want to request feedback from** (you will send the questions to your inbox to answer). Click the **Feedback Template** and select **Career Conversation**. Do not make other changes.
3. Click **Submit**
4. Go to your inbox.
5. Click on your Inbox, respond to the three question or check the **Decline** box for irrelevant questions.

The image contains two screenshots of the Workday 'Get Feedback on Worker' form. The first screenshot shows the 'Worker' dropdown menu with 'My Team' selected, highlighted with a red box and a red '1'. The second screenshot shows the 'Who do you want to request feedback from?' field with a search box, highlighted with a red box and a red '2'. Below it, the 'Feedback Sharing' section has 'Share with others' selected, and the 'Questions' section has a 'Feedback Template' dropdown menu highlighted with a red box.

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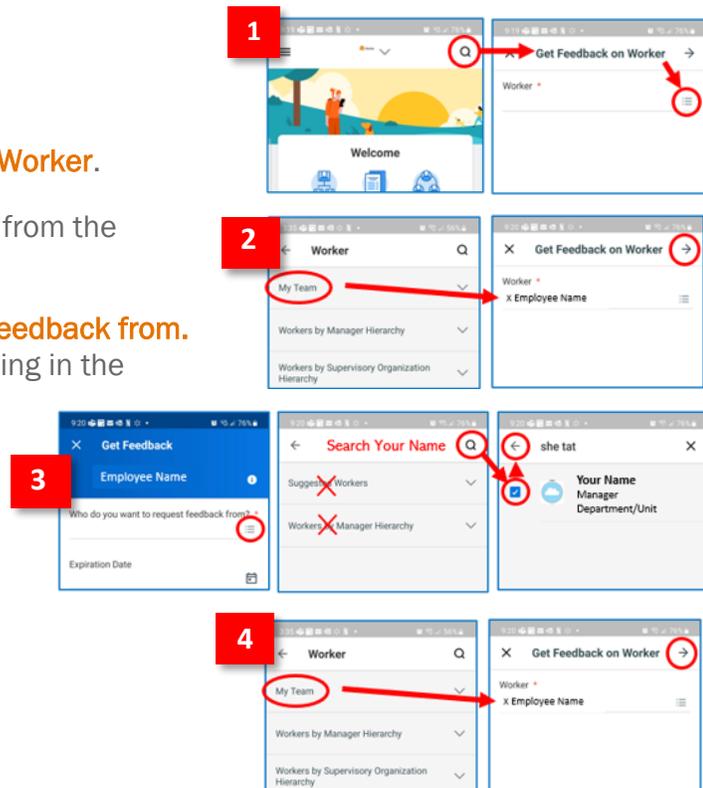
Using a Mobile Device

Workday allows you to enter a few quick notes using your device and then send the notes to your inbox where you can expand on those notes later. The following screenshots are of phone entry. As a reminder, all entries will appear on the performance evaluation Feedback section.

Entry is a 2-step process. First, you create a feedback template and second, you send the template to your inbox to enter the conversation information.

Step 1 - Create a feedback template.

6. Click the search icon and enter **Get Feedback on Worker**.
7. Click **My Team** and then select the team member from the dropdown list.
8. Click the search for **Who do you want to request feedback from**. Enter your **own name** in the search (you will be filling in the career conversation questions).
9. Click the search for the **Feedback** template and select **Career Conversation**. Do not make other changes.
10. Click **Submit** to send the template to your inbox.



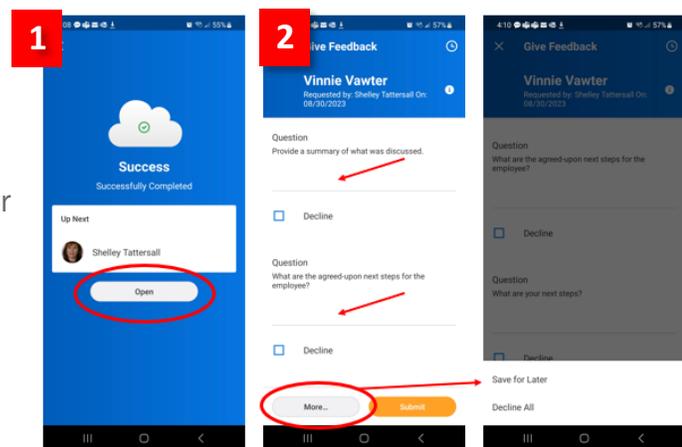
Step 2 - Fill in the template questions.

None of the three questions in the template are required. Check the **Decline** box for irrelevant questions.

1. Click **Open** to access the feedback template in your inbox.
2. For quick note entry: enter abbreviated notes for each section and click **More** and then **Save for Later**. Go to you PC's inbox later to complete and **Submit**.

OR

For full entry: enter all information and click submit.



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Reports

My Team's Feedback

Only team members reporting up to you will be included in the report. Use the Feedback Start Date to filter out feedback from previous performance years. Uncheck the box to filter to only team members with feedback.

Export the report to Excel to filter to feedback from the career conversation template.

The screenshot shows a filter dialog box for the 'My Team's Feedback' report. It includes the following fields and options:

- Select specific worker(s) (Optional): [Empty text box]
- Feedback Start Date (Optional): [MM/DD/YYYY date picker] [Time picker: --:--:-- AM]
- Feedback End Date (Optional): [MM/DD/YYYY date picker] [Time picker: --:--:-- AM]
- Include Workers Without Feedback?
- Feedback From (Optional): [Empty text box]

My Direct Reports' Feedback Details (Last 12 Months)

Provides feedback for a 12-month period. Enter a team member's name and then export to Excel to filter to career conversation questions.

Requested Feedback Responses

This report filters to Career Conversation feedback. Search for the Career Conversation **Template**.

The screenshot shows a filter dialog box for the 'Requested Feedback Responses' report. It includes the following fields and options:

- Feedback Question Type: [Empty text box]
- Feedback Template: [x Career Conversation ...]
- Feedback Question: [Empty text box]
- Feedback Provider: [Empty text box]
- Start Date: [09/01/2023 date picker]
- End Date: [MM/DD/YYYY date picker]
- Buttons: OK (orange), Cancel (white)