Completing your Self-Evaluation

Step 1: Navigate to your Workday Inbox:

Log into Workday, navigate to your Workday Inbox by clicking on the ibox icon:



Step 2: Open your Self Evaluation:

In your Workday Inbox, find and click on the "Self Evaluation" task for your appraisal in the left hand bar, then click on "Go to Summary Editor" to open the task:

f Evaluation: Nurse Year-End praisal: Ann Wright Actions W Period 1/2018 - 06/30/2019 coond(s) ago - Effective 06/30/2019 The year-end process provides a time for review of your achievement of professional and organizational growth. Employee/Manager: Complete all sections and
praisal: Ann Wright Actions W. Period 1/2018 - 06/30/2019 Hecond(s) ago - Effective 06/30/2019 The year-end process provides a time for review of your achievement of professional and organizational growth. Employee/Manager: Complete all sections and
w Period 1/2018 - 06/30/2019 coond(s) ago - Effective 06/30/2019 The year-end process provides a time for review of your achievement of professional and organizational growth. Employee/Manager: Complete all sections and
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The year-end process provides a time for review of your achievement of professional and organizational growth. Employee/Manager: Complete all sections and
Employee/Manager: Complete all sections and
provide comments to support your ratings.
Additional Manager (if applicable): Only provide feedback within the "Comment" fields for the goals that are relevant to your interaction with the employee.

Tip: If you want to view the appraisal in full screen mode, click the 📑 icon in the top right corner.



Completing the <u>Performance Goals</u> section:

Each item in this section must be rated. To rate, comment, or edit a goal, click anywhere in the goal, or click

the 🥒 icon in the top right corner of the goal:

Performance Goals Goal * Goal * Format ~ B I U A ~ := Goal 1
Goal * Goal * Format \lor B I U A \checkmark := Goal 1 Description Format \checkmark B I U A \checkmark := Performat \checkmark B I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A \checkmark := Performat \checkmark B I I U A I I I I I I I I I I I I I I I I
Soal ★ Format ∨ B I U A ∨ :≣ ♥ Goal 1 Description Format ∨ B I U A ∨ :≣ ♥ Description of Goal 1
Bool ★ Format ∨ B I U A ∨ :≣ % Description Format ∨ B I U A ∨ :≣ % Description of Goal 1 Category × Individual Status select one Status Select one
Format ∨ B I U A ∨ !≡ %
Goal 1 Description Format ∨ B I U A ∨ :≣ ♥ Description of Goal 1 Category × Individual :≡ Status select one ▼ Employee Evaluation
Pescription Format B I U A Imployee Evaluation
Description of Goal 1 Category Individual Status select one The select one
Category Individual Status select one Topologies Evaluation
× Individual :≡ Status select one ▼ Employee Evaluation
Status select one The select
select one The select one Th
Employee Evaluation
Rating 2. Fully Meets Expectations

When you are finished rating/commenting on a goal, **click on the next goal**, or click the view icon. Either action automatically saves your work.



The "Category" and "Status" dropdowns are optional.



Adding a Goal (optional):

If you need to add a goal to the appraisal, look for the "Add" button under the last goal listed in the Performance Goals section:

Goal *	\times	=	ß
Goal added by manager after EE submitted self eval TEST			
Description			
Category			
Status			
Employee Evaluation			
Rating			
Comment			
			_
Add			

When you click the "Add" button, you'll be able to type, or copy+paste, a new goal and add your rating/comments. Click the grey check box icon 🔍 to save it:

Use Existing Goal				A.
Goal *				
Format 🗸 🛛 🛚 🛛	IUA	✓ I :■ I & I	2 ²¹	
Description				
Format V B	IUA	✓ :■ %	12 ²⁷	
	:=			
Status				
Status select one	•			
Status select one Employee Evaluatio Rating select one	r n			
Status select one Employee Evaluatio Rating select one	v n			
Status select one Employee Evaluatio Rating select one Comment Format V B	• • •	~ := <i>O</i>	~	
Status select one Employee Evaluatio Rating select one Comment Format V B	v n v	 ✓ :■ ⊗ 	×*	



If a manager-approved goal is missing from the appraisal, try "Use Existing Goal" to see if it is available to import.

Removing a Goal from the Appraisal (option):

To remove a goal from the appraisal form, click the \times icon. You will get a prompt to confirm your wish to delete the goal from the appraisal.

Goal *	× 🗉 🧷
Goal 1	
	Ť
Description	I
Description of Goal 1	

Performance Goals Summary section:

At the end of the Performance Goals section is a Summary showing the auto-calculated overall rating of the Performance Goals section. Although there is the grey pencil icon to edit, there are no fields in this summary that are available to edit.



For more on information on ratings <u>click here</u>.

Summary	
Overall Rating Weight 50	P
Employee Evaluation	
Rating 2. Fully Meets Expectations	
Dependable results and/or behaviors; produces outcomes that meet all qualitative and quantitative measures; occasionally exceeds expectations	
Calculated Rating 2	
Calculated Rating Value	
2. Fully Meets Expectations	



Completing the <u>ASPIRE Values</u> section:

After you are finished with the Performance Goals section, scroll down to the ASPIRE Values section.

Each item in ASPIRE Values section must be rated. To rate an ASPIRE Value, click anywhere in the

Value, or click the 🧪 icon in the top right corner of the Value:

SPIRE Values	Guide Me
ompetency	Û
PIRE: Accountability	
itegory	
PIRE	
escription	
knowledging and assuming responsibility for where we have succeeded as	nd failed in terms of our actions,
Jwn your commitments and outcomes	
efine and set clear expectations	
e responsible for your mistakes and help to create solutions	
Ips://www.medicalcenter.virginia.edu/human-resources/performance-man rksheets/ASPIREBehaviorsHandout.pdf	agement/fy18-forms-and-
mployee Evaluation	
ting	
Fully Meets Expectations	
pendable results and/or benaviors; produces outcomes that meet all quali easures: occasionally exceeds expectations	tative and quantitative

When you are finished rating a Value, click on the next Value, or click the 🗸 icon. Either action automatically saves your work.

ASPIRE Values Summary section:

At the end of the ASPIRE Values section is a Summary showing the auto-calculated overall rating of the ASPIRE Values.

Click anywhere in the section to add a comment or click the 🧷 icon:

Employee Evaluation	\sim
Rating	
2. Fully Meets Expectations	
Dependable results and/or behaviors; produces outcomes that meet all qualit measures; occasionally exceeds expectations	tative and quantitative
Calculated Pating	
2.33	
Overall Rating Weight 25	
Competency Rating Calculated	
2. Fully Meets Expectations	
Comment	
Format	R.M.



Completing the Clinical Career Ladder responsibilities section (Nurse appraisals only):

Only clinical career ladder nurses will have the Clinical Career Ladder section in the appraisal. If you are not a CCL Nurse with a Nurse Year-End Appraisal, you can skip this part the job aid (proceed to page 7 of this job aid).

Each item in this section must be rated and have a comment entered. To rate/comment, click in the

responsibility, or click the

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7	ICON'	
r -	ICOIL	

1



When you are finished rating and commenting on a responsibility, click on the next responsibility, or click

the 🧹 icon. Either action automatically saves your work.

Clinical Career Ladder Summary section:

At the end of the Clinical Career Ladder section is a Summary showing the auto-calculated overall rating of the Clinical Career Ladder responsibilities.

Click anywhere in the section to add a comment or click the 🧷 icon.

Summary	
Overall Rating Weight 25	1
Employee Evaluation	
Rating 2. Fully Meets Expectations	
Dependable results and/or behaviors; produces outcomes that meet all qualitative and quantitative measures; occasionally exceeds expectations	
Comment	



Reviewing the Feedback (Peer Review) Section:

If any feedback (peer review) marked "Share with others" was received, it will appear as a hyperlink number. The number indicates how many individual feedback forms were received. For FY19, feedback is only required for Nurses and Nurse Managers. *Feedback is optional for all other employees.*

Feedback		Guide Me
All Feedback Requested Feedback	2	



For resources on how to use 'Get Feedback on Self' click here.

A box showing feedback appears when you click on the number next to "Requested Feedback." If there is not a number in your appraisal, then you have not received feedback marked "Share with others."

7 items		000			Ē	x	×	
Question	Feedback	Feedback Type	From	Requested By	Date			
Relationship Based Care: reflects the influence of the nurse's relationship with self, colleagues and patient/family on the patient experience. Provide specific examples/strengths of how RBC: Patients and Families is demonstrated, and identify areas for month/further	;ldkef1;sdkflsg;dkfd	Requested by Others	Alexander Rodriguez	Jesse Cohen	06/19/2019 11:18:08.643 AM	~		
	Feedback				(Gu	ide N	/le
	All Feedback Requested Feedback	2						

Feedback Summary section:

At the end of the Feedback section is a Summary where you can add comments as needed.

Click anywhere	in the	section	to add a	comment or	click the	1	icon:
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Feedback	Guide Me
All Feedback	
Requested Feedback 2	
Summary	
Employee Evaluation	0
Comment	



Reviewing/Adding <u>Supporting Documents</u> Section:

You can add documents via this section. There is also a summary section that allows comments related to any documents. *This section is optional.*

	Supporting Documents	Guide Me	
	Employee		
	Add		
	Evaluation Supporting Document (empty)	$\Leftrightarrow \checkmark$	
2	File		
	Attach		
	Updated By (empty)		
	Upload Date (empty)		
	Comment		
	> Details		
	Supporting Documents	Guide Me	
	Employee		3
	Evaluation Supporting Document (empty)	\$ ~	
	File Performance Management Cycle.pptx		
	Updated By (empty)		
	Upload Date (empty)		
	Comment		
	> Details		



Overall Rating and Comments Section (Last Section):

The last section at the bottom of the appraisal screen contains the auto-calculated overall rating and allows any final comments to be added. You cannot edit the overall rating; it is automatically calculated.

To add comments,	click in the section or the click the		icon:	
------------------	---------------------------------------	--	-------	--

Overall	Guide Me
Employee Evaluation	0 🔺
Rating 2. Fully Meets Expectations	
Dependable results and/or behaviors; produces outcomes that meet all qualitative and quantitative measures; occasionally exceeds expectations	
Calculated Rating	
2.49	
Comment	



Talent Management: Appraisal: Self-Evaluation

Step 3: Create a copy of the appraisal (optional)

Once you submit your appraisal to your manager, it is not available to you until it has gone through the manager steps and routes back to you for acknowledgement.

You can create a PDF copy of the appraisal. However, the appraisal has not been approved at this point, so it should be for your reference only until the final approved appraisal has gone through all the steps and is acknowledged and complete.

If you wish to skip this step of the job aid, proceed to Step 4 on page 13 of this job aid.

Navigate to your Performance page in Workday:

Before we navigate to your performance page, click "Save for Later" at the bottom of the appraisal screen:

	measures; occasionally exceeds expectations	
	Calculated Rating 2.28	
	Comment	
Submit	Send Back Save for Later	1
If you don't see the "Save for Later" b	outton, click to select this option:	

To navigate to your Performance page, click on your profile picture in the top right corner, then click "View Profile":







Click the "Performance" link in the left-hand blue menu bar:



If "Performance" isn't listed, click "More (#)" to view the more links.

Click on the Performance Reviews tab at the top of the page:

Individual Goals	Archived Goals	Performa	nce Reviews	Succession Profile	Feedbac
In Progress 2 items		/	•		
Poviow		Review	Period	Status	
Review		Start Date	End Date	Status	
Nurse Year-End App Wright	raisal: Ann	07/01/2018	06/30/2019	Complete Manager Evaluat Performance Review	ion for

Look for the Year-End Appraisal that is in progress and click on the "Create New PDF" button:

Individual Goals Archived	Goals Per	formance Reviews	Feedback Received Feed	back Requested				
In Progress 1 item							X	Ŧ
Review	Start Date	Review Period End Date	Status	Awaiting				
Nurse Year-End Appraisal: Ann Wright	07/01/201	18 06/30/2019	Complete Self Evaluation for Performance Review	Ann Wright	View	Create New PDF		<
<							>	



You may be prompted with the option to be notified later while the PDF generates. You can wait for the PDF to load, or click "Notify Me Later" and you'll get a notification when the PDF is ready to be viewed:

Your	request is being processed	
You car	continue to wait or choose to be notified later.	
$\left(\right)$	Notify Me Later	

If you choose to be notified later, you'll get a notification when the PDF is ready. You can then access it from your Workday Notifications page:

	in Home	Q Search	
Notific	ations		
Viewing: All	Sort By: N From Last 30 Days	lewest V	Document Available
Document Ava Ann_WrightNu End_Appraisal Reports 2 minute(s) ag	ilable urse_Year- .07_10_2019.pdf is now o	▲ vavailable in My	2 minute(s) ago Ann_Wright_Nurse_YearEnd_Appraisal_07_10_2019.pdf is now available in My Reports Details Ann_Wright_Nurse_Year-End_Appraisal_07_10_2019.pdf



Step 4: Submitting the Appraisal:

(If you skipped Step 3: Create a copy of the appraisal, proceed to the next page of this guide)

If you used the option from Step 3 to create a copy of the appraisal, navigate back to your Inbox to re-open the appraisal:



Proceed to the next page of this guide.



There are four buttons at the bottom of the appraisal screen:

Submit	Send Back	Save for Later	Close

Submit: sends the appraisal to your manager.



If you receive an error message when trying to Submit the appraisal, be sure that you have a minimum of three Performance Goals, and check that all items in each of the sections were rated.

Save for Later: saves the appraisal as a draft to be finished later. If any "Additional Manager Evaluations" or feedback (peer review) is pending, you can save the appraisal for later and wait until they have been received before submitting. The appraisal will automatically update with any additional manager evaluations or feedback as it arrives.

Close: closes the task to view the next item in your inbox. It does not complete the appraisal and you can return to it later. However, we recommend you click "Save for Later" before clicking "Close".

Additional Resources:

For more on information on ratings <u>click here</u>.

For resources on how to get feedback on self <u>click here</u>.

To find your HR Buisness Partner click here.

