Completing your Self-Evaluation
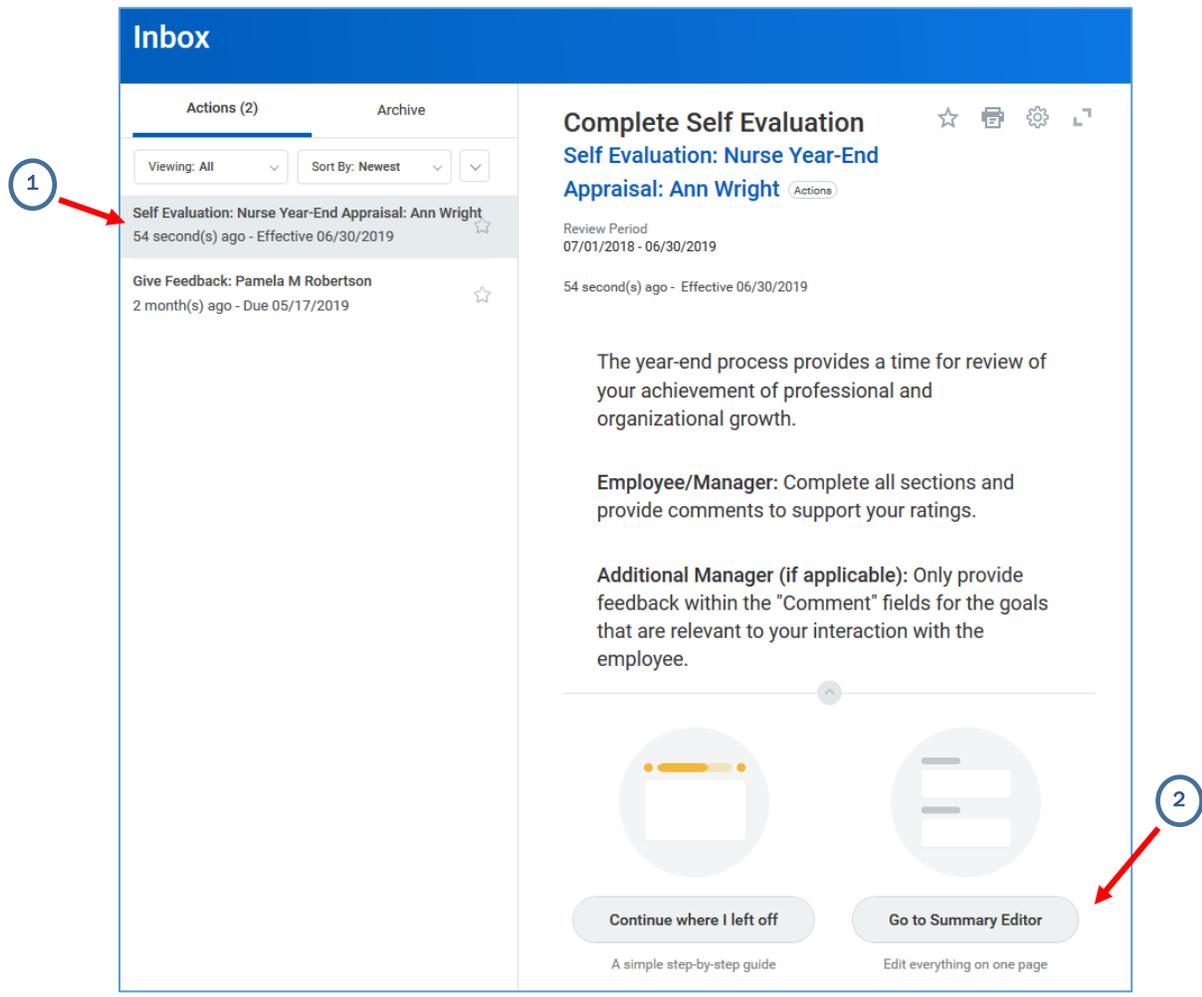
Step 1: Navigate to your Workday Inbox:

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:

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

Completing the Performance Goals 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:
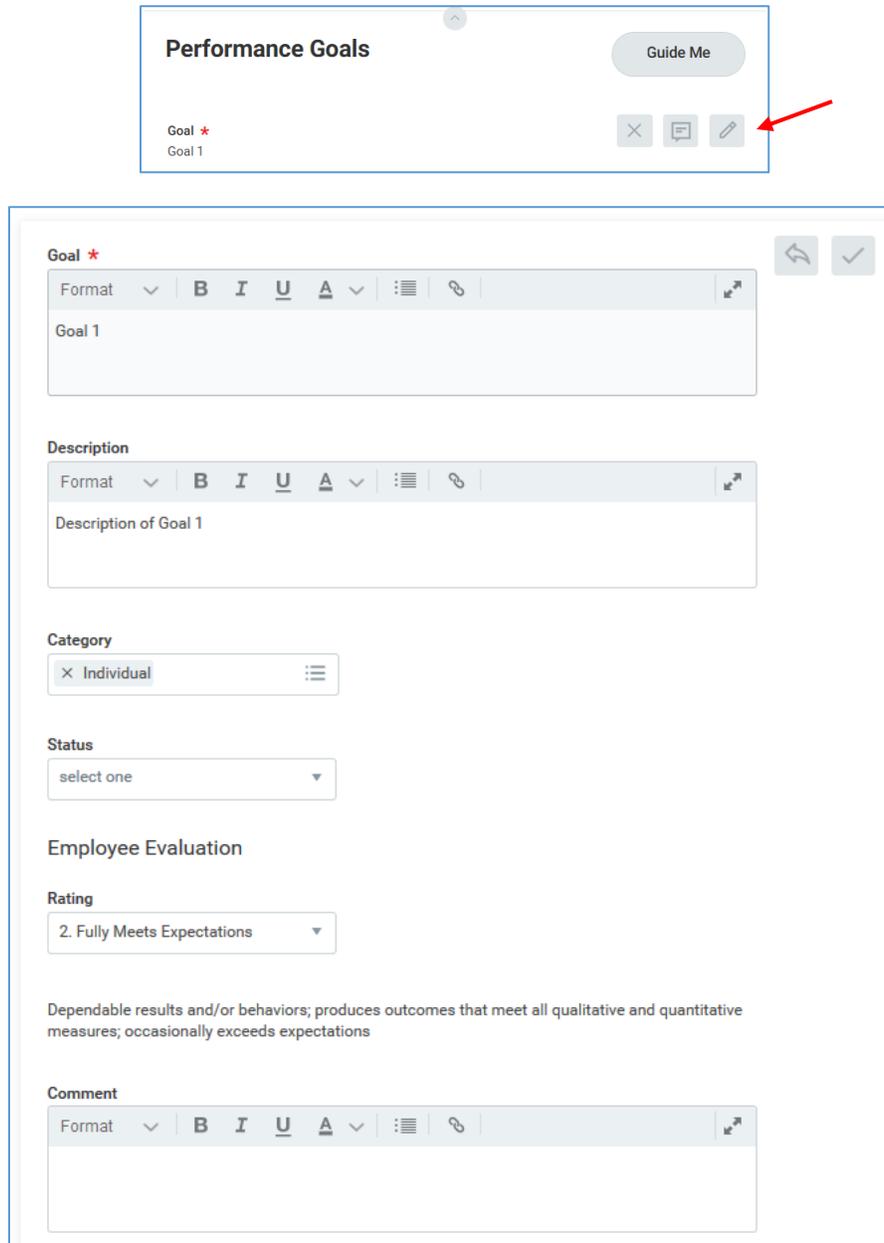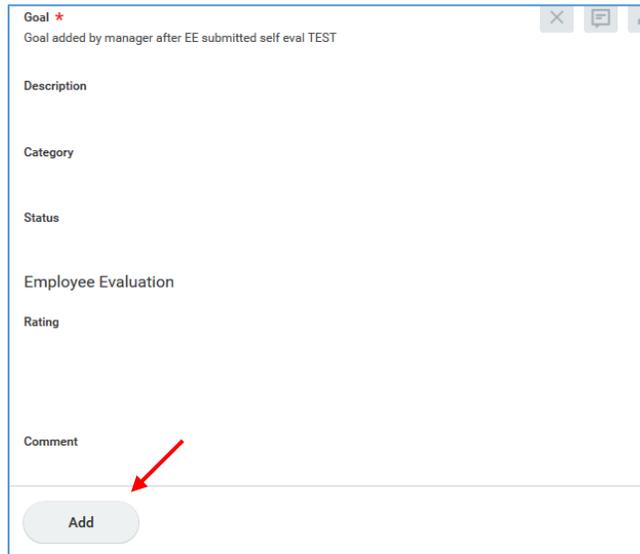

When you are finished rating/commenting on a goal, **click on the next goal**, or click the ✓ icon. Either action automatically saves your work.

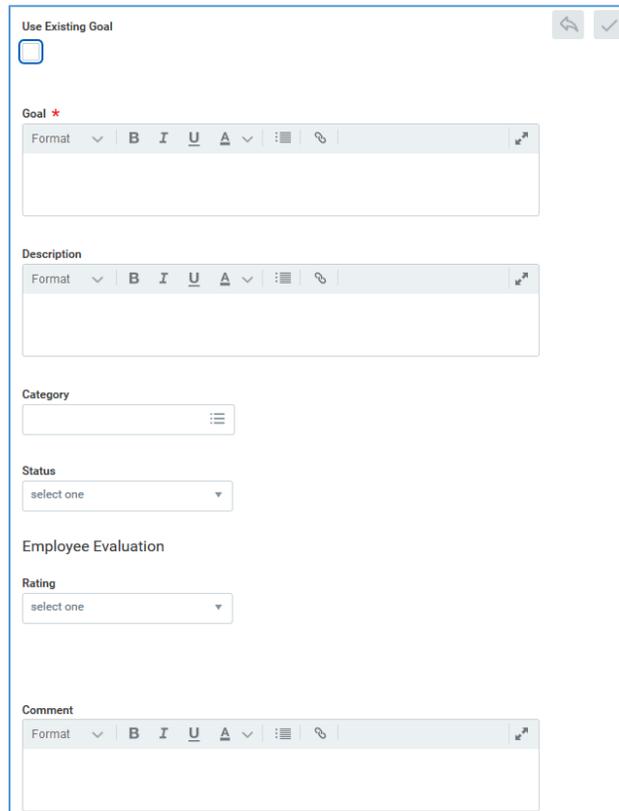*The "Category" and "Status" dropdowns are optional.*

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:

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:
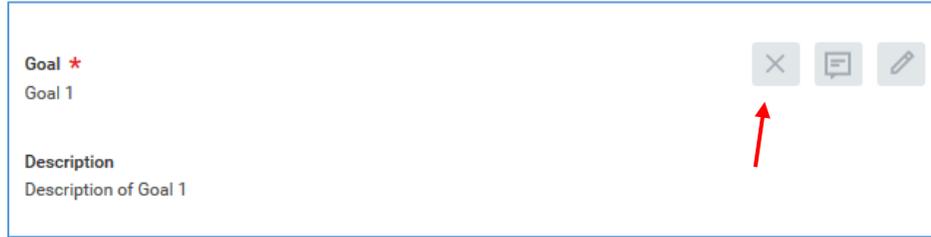

If a manager-approved goal is missing from the appraisal, try "Use Existing Goal" to see if it is available to import.

Removing a Goal from the Appraisal (option):

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

> **Goal** *
> Goal 1
>   × 🗩 ✏
>
> **Description**
> 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 click here.

> **Summary**
>
> **Overall Rating Weight**   ✏
> 50
>
> **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 ASPIRE Values 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:

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

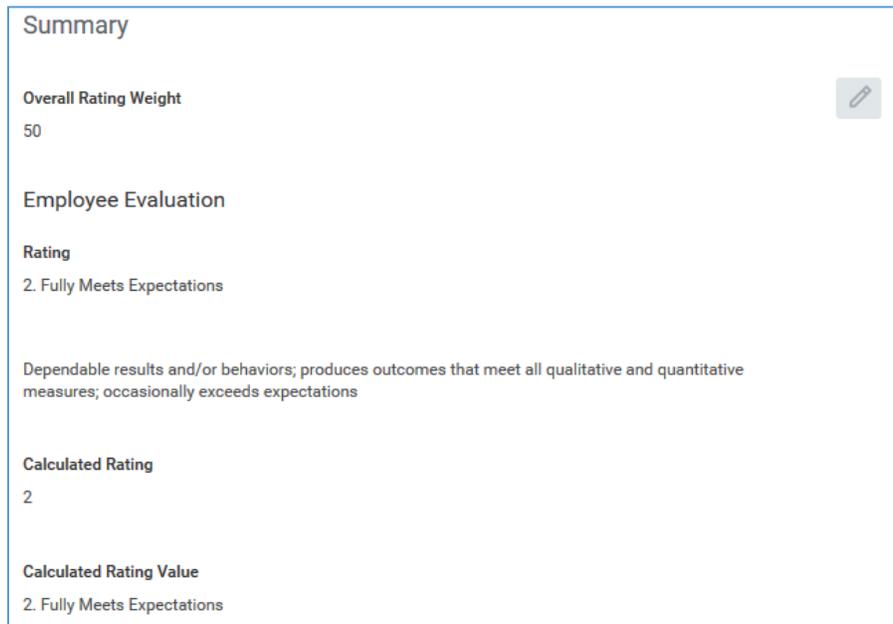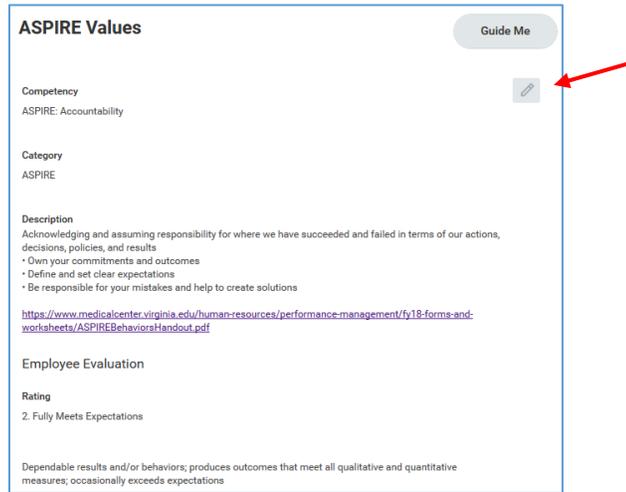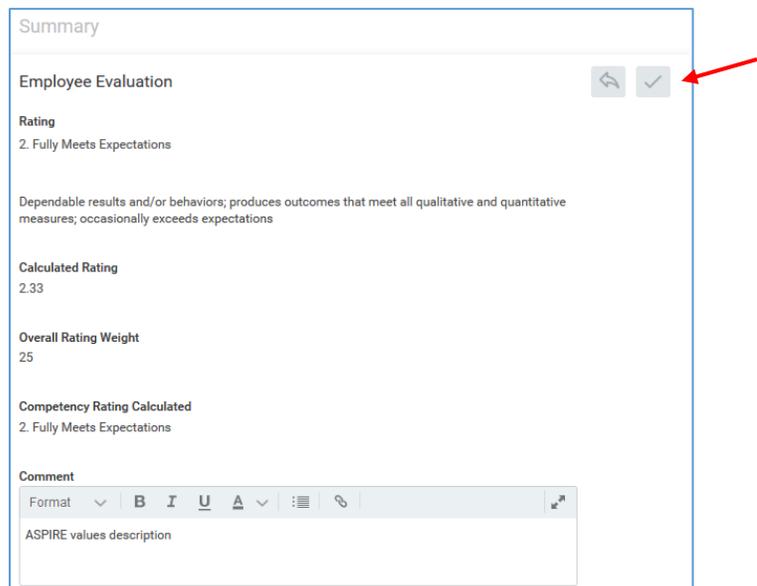ASPIRE Values Summary section:

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:

Click the grey check box when finished to save: [✓]

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 [pencil icon] icon:
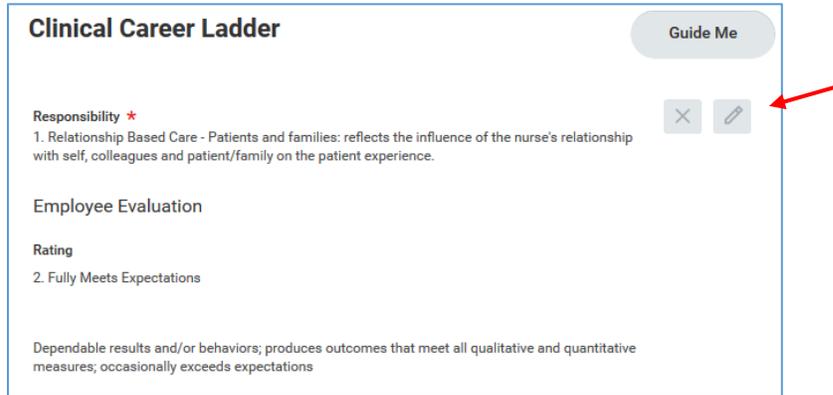
Clinical Career Ladder   Guide Me

Responsibility *
1. Relationship Based Care - Patients and families: reflects the influence of the nurse's relationship with self, colleagues and patient/family on the patient experience.

Employee Evaluation

Rating
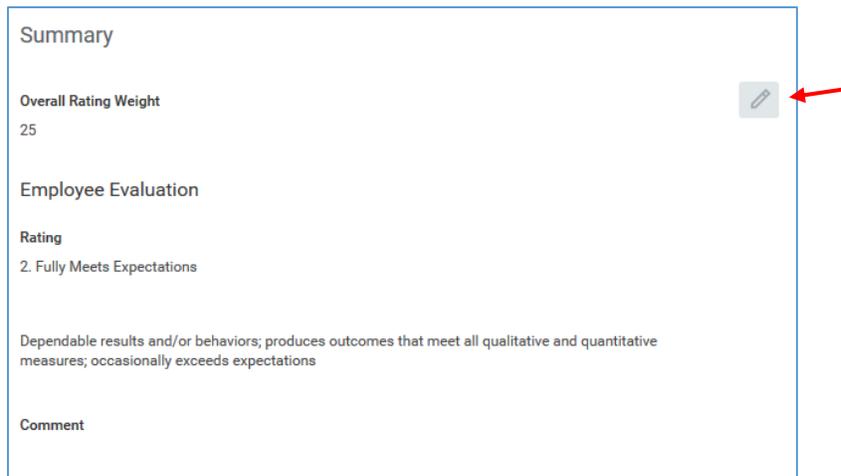2. Fully Meets Expectations

Dependable results and/or behaviors; produces outcomes that meet all qualitative and quantitative measures; occasionally exceeds expectations

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

the [check icon] 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 [pencil icon] icon.

Summary

Overall Rating Weight
25

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

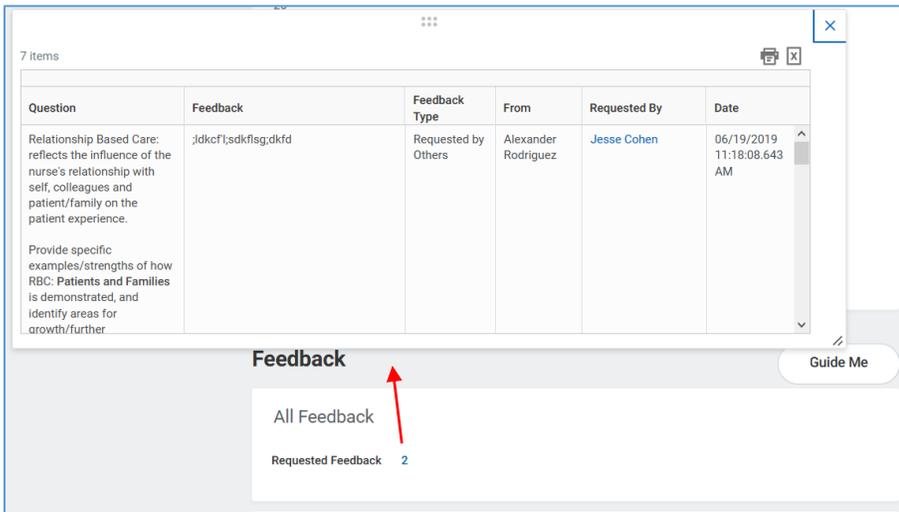Click the grey check box when finished to save: [check icon]

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.*
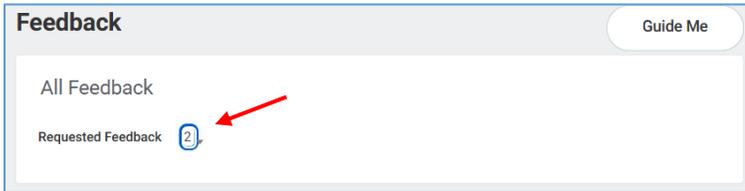
For resources on how to use 'Get Feedback on Self' click here*.*
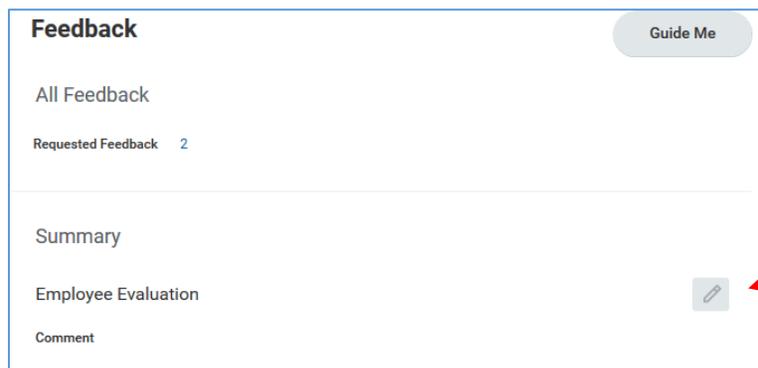
A box showing feedback appears when you click on the number next to "Requested Feedback." If there is not a number in your appraisal, then you have not received feedback marked "Share with others."

Feedback Summary section:

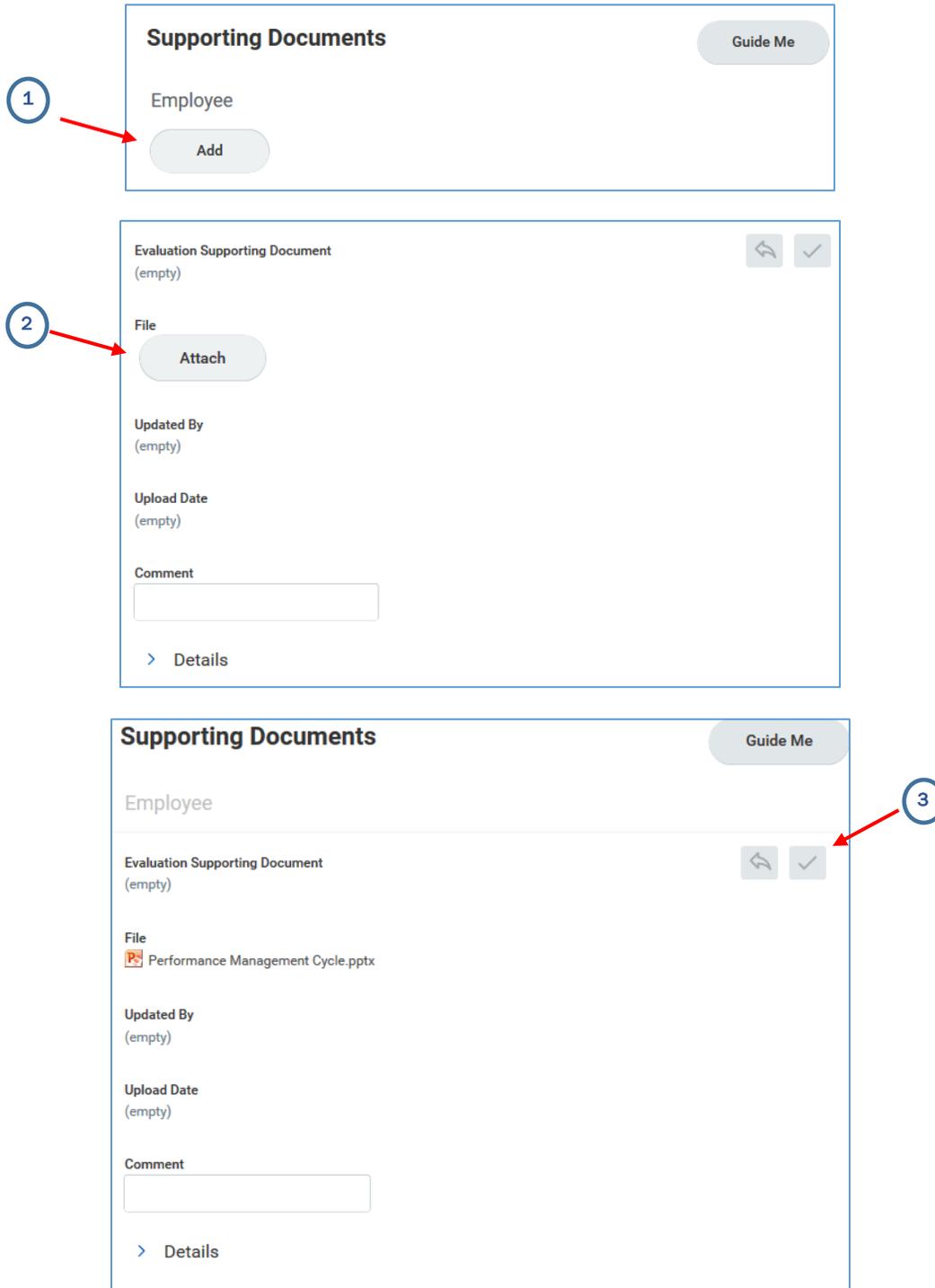At the end of the Feedback section is a Summary where you can add comments as needed.

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

Click the grey check box when finished to save:

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.*
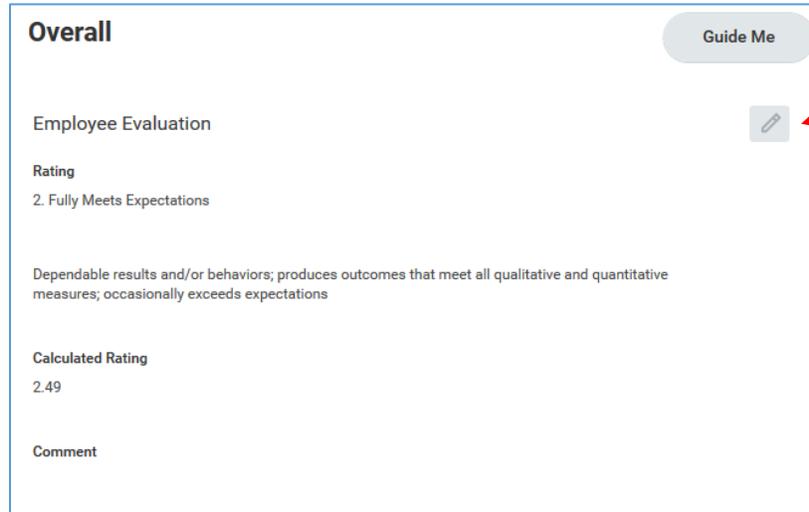
<u>Overall Rating and Comments</u> Section (Last Section):

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:

Click the grey check box when finished to save: [✓]

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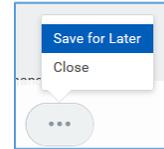
If you wish to skip this step of the job aid, proceed to Step 4 on page 13 of this job aid.

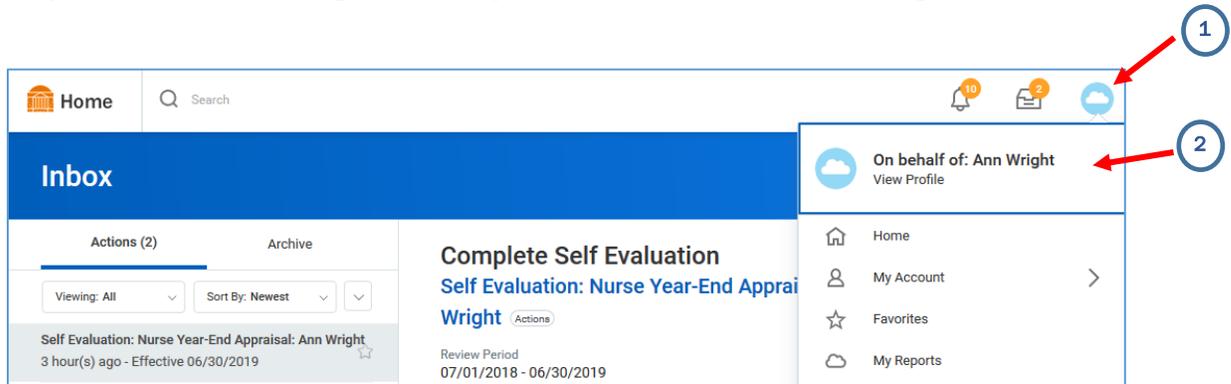**Navigate to your Performance page in Workday:**

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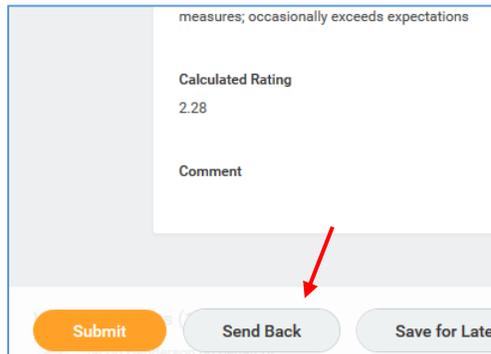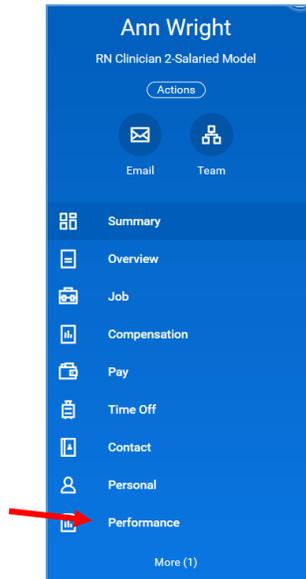

If you don't see the "Save for Later" button, click (...) *to select this option:*

To navigate to your Performance page, click on your profile picture in the top right corner, then click "View Profile":
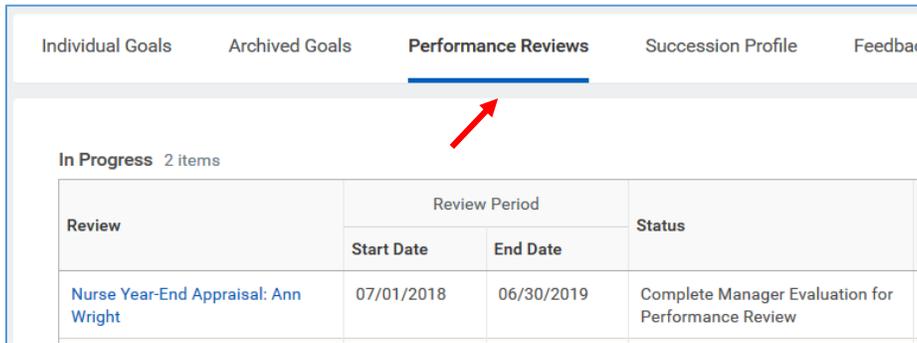
Click the "Performance" link in the left-hand blue menu bar:
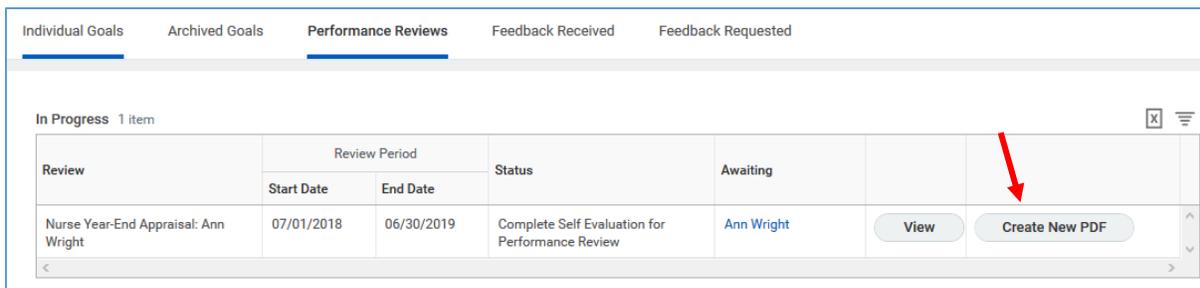

💡 *If "Performance" isn't listed, click "More (#)" to view the more links.*
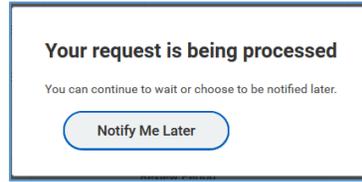
Click on the Performance Reviews tab at the top of the page:

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

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:

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:
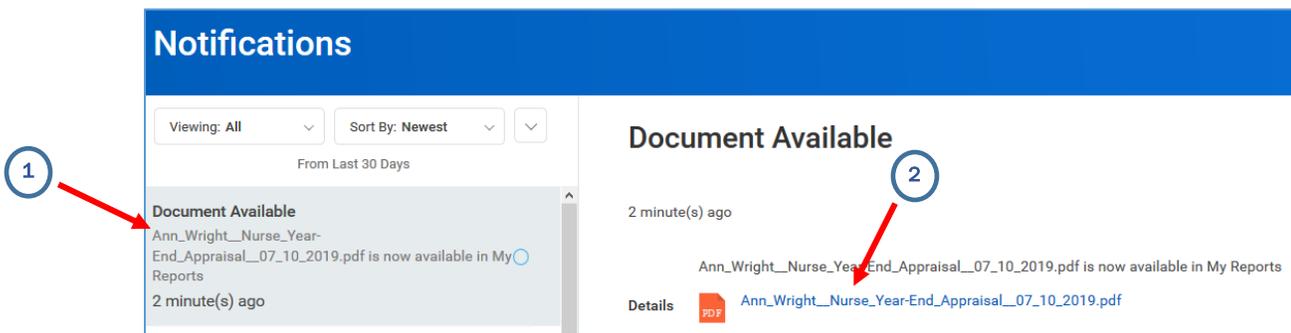
Step 4: Submitting the Appraisal:

(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:
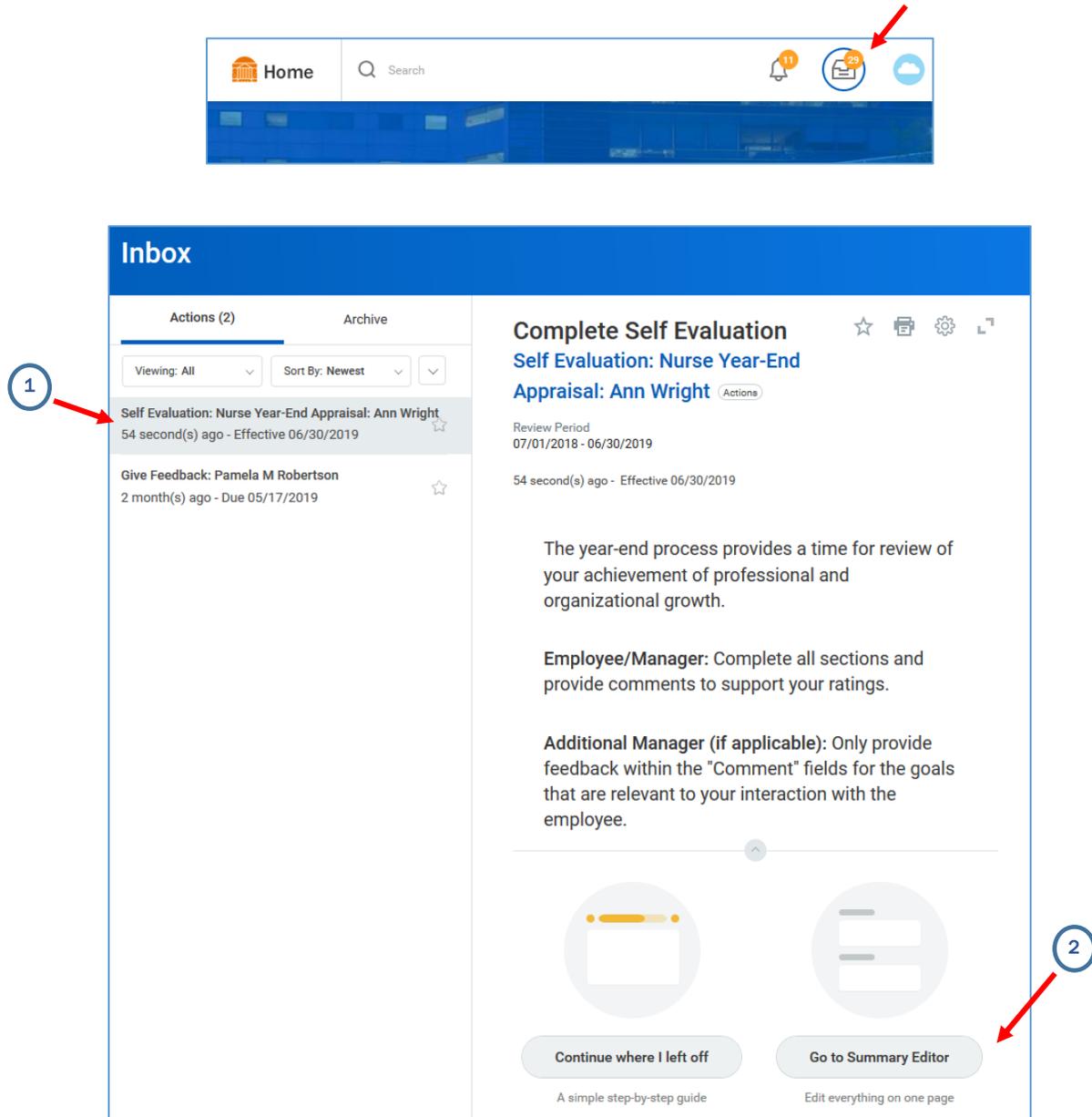
Proceed to the next page of this guide.

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 click here.

For resources on how to get feedback on self click here.

To find your HR Buisness Partner click here.