

TAMU-Commerce Complete Performance Review – Staff (Employee)

Overview

This job aid outlines the activities for an Employee to complete a Performance Evaluation using the Staff templates. **The employee MUST COMPLETE the self-evaluation before the manager will be able to complete the evaluation. All steps of the evaluation should be completed by June 1, 2021.**

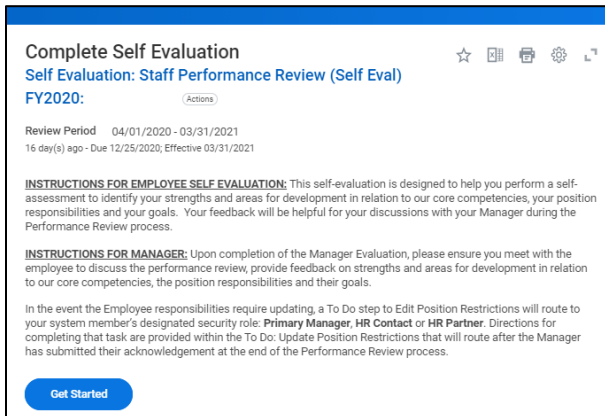
Important Information:

- Your Manager has the option to Get Additional Reviewers. These individuals are typically those who have worked with you for a significant portion of time during the evaluation period and could add input to your performance evaluation. Additional Reviewers can provide comments and ratings but **only** on the competencies section of the evaluation.
- Existing goals on the Employee profile are locked once the Performance Review is launched for the system member and are no longer editable. However, goals can be added and edited from within the performance review inbox task. Changes will populate onto the Employee’s worker profile when the performance review is complete. You will not have goals from last year. A different template was used due to the COVIC-19 pandemic. However, you may have goals from previous years.

Steps

Get Started

Read the directions provided within the inbox task in Workday. Click **Get Started** to begin



Complete Self Evaluation

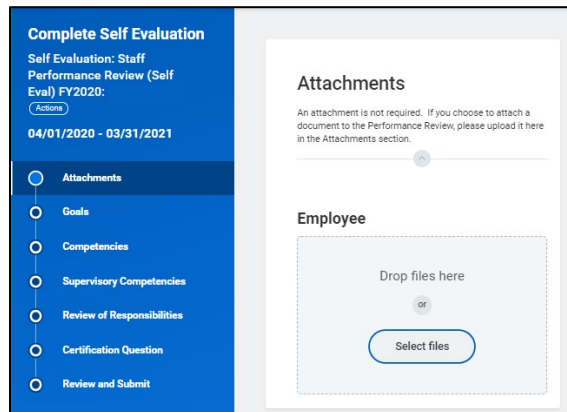
Attachments (Optional)

Employees have the option to add attachments relevant to the performance review. You can click **Next** to move to the next section of your

self-evaluation if you have no documents to upload.

BEST Practice: Keep a list of your accomplishments throughout the year that you can attach here for your manager to review.

1. Click **Select files**. Locate and select the file you would like to upload to the performance evaluation



- Click **Upload** to select additional files if desired

- You may want to add a comment to provide helpful information as to why this document was added to the review
- Click **Next**

Goals

Not all departments use this feature. If goals are not relevant for your performance review, you can use the **Next** button to move to the next section of the review

- Review each goal, update the **Status** and **Completed On** date as applicable

Note: If no goals are listed you can also click **Add** to add an existing or new goal

- Rate yourself on each goal listed and include comments

- Click **Next**

Competencies

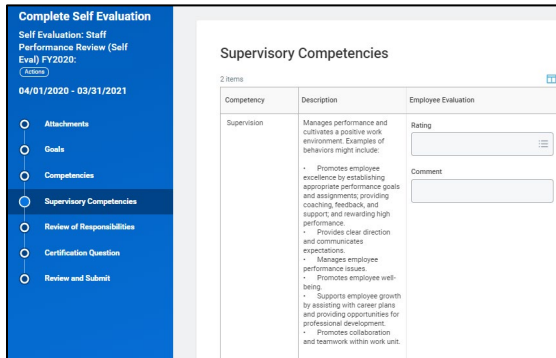
All positions across the Texas A&M University System have competencies on which you are evaluated

- Rate yourself on each competency and provide comments
- Click **Next**

Supervisory Competencies

If this section is not relevant to your position, you can use the **Next** button to move to the next section of the review

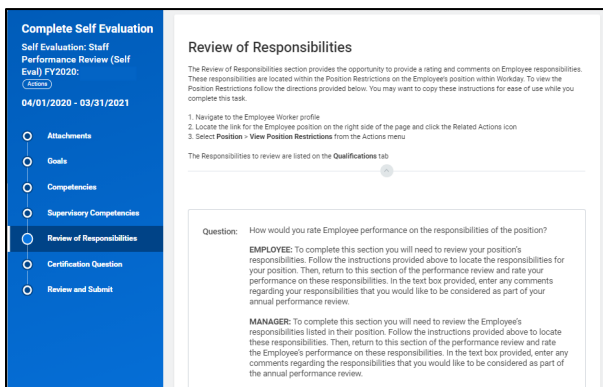
10. Rate yourself on each competency listed and provide comments



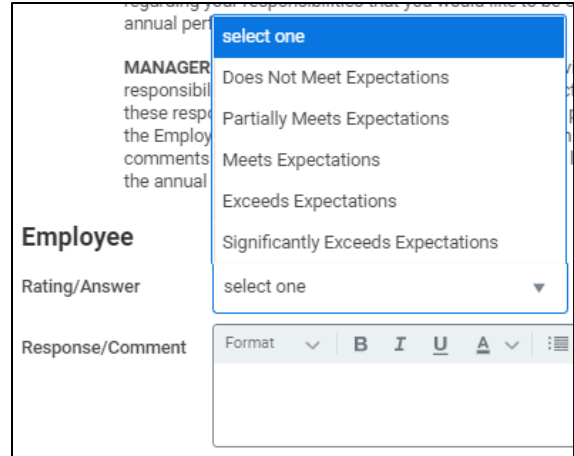
11. Click **Next**

Responsibilities

Responsibilities vary across positions. Follow the instructions provided to view the responsibilities assigned to your position



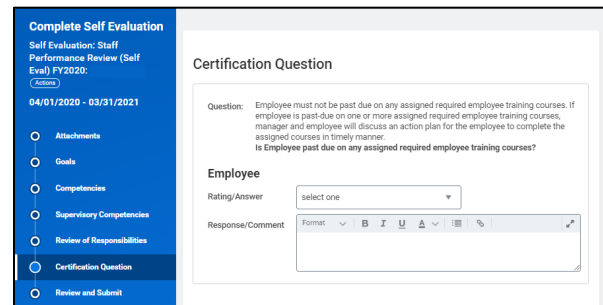
12. Enter a rating for your evaluation of your performance in completing these responsibilities and add comments as appropriate



13. Click **Next**

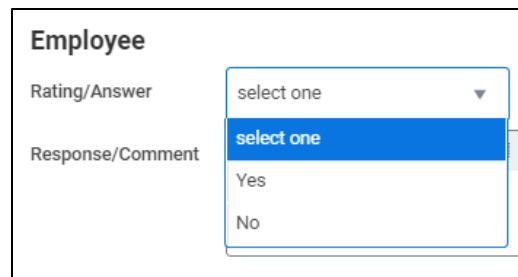
Certification Question

This section is about required trainings you may have been assigned during the evaluation period



14. Select the appropriate answer in the **Rating** field

- Select **Yes** if you are past due on required trainings
- Select **No** if you are not past due on required trainings

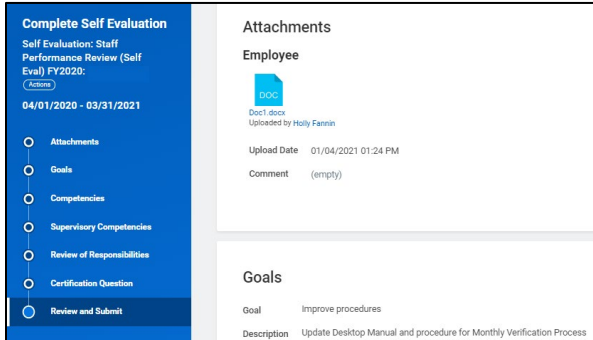


Note: If you select **Yes**, you may want to add a comment

15. Click **Next**

Review and Submit

This section allows you to review the information you completed in its entirety. You can make edits if necessary



16. Review the information and make any edits
17. Click **Submit**

Up Next

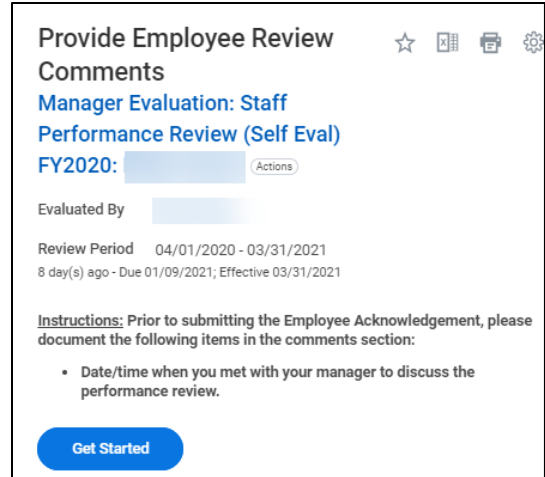
Your Manager will now receive an inbox task that contains the information you provided in order to complete their evaluation of your performance

The Employee and Manager may meet at this point or earlier, prior to submission by the Manager, to discuss the performance evaluation. **Once your Manager submits the performance evaluation in Workday, you will be able to view all of the information provided and acknowledge.**

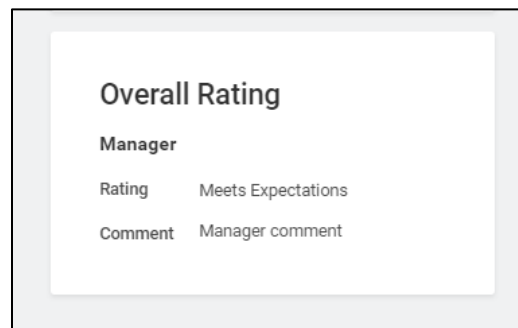
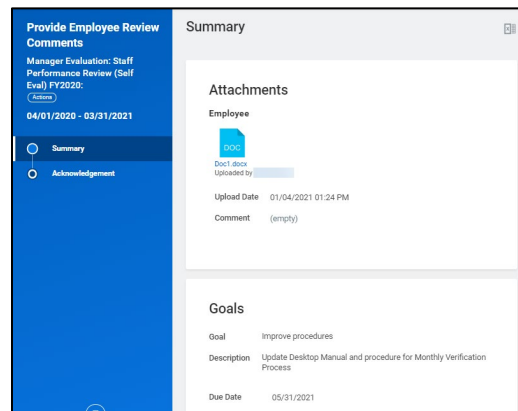
Employee Submits Acknowledgement

Your Manager has completed the your performance review

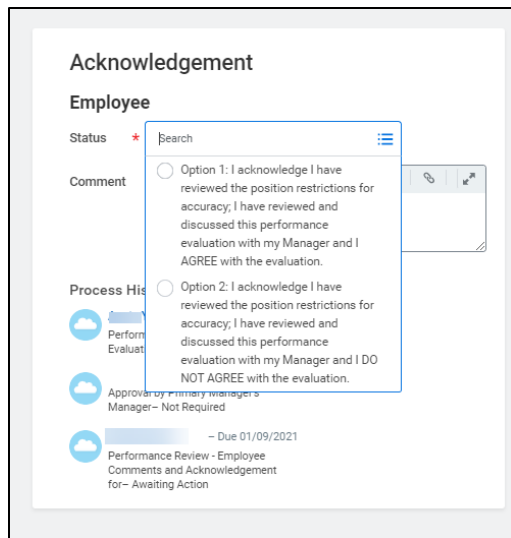
1. Click **Get Started**



2. You can review all information provided by you in your self evaluation (if applicable), your Manager and any Additional Reviewers or Additional Managers that were added to the review. Your overall rating will also be visible



3. Click **Next**
4. Select the appropriate **Status Option** that represents your agreement or disagreement with the performance evaluation



5. Click **Submit**

Up Next

Your Manager will submit their acknowledgement of the performance evaluation

Be Advised:

- If the Manager selects the option that denotes an update to your position restrictions is required, this process will be routed to the appropriate person at your member
- If your Overall Rating is Partially Meets Expectations or Does Not Meet Expectations, your Manager receives a To Do to **Complete a Performance Improvement Plan**

This completes the **Complete Performance Evaluation** process for those using the Staff template