

Workday

Performance Goals

The first step in the performance review process involves setting performance expectations between a staff member and their manager. Setting performance expectations involves a review of job responsibilities and goal setting.

- [Add Goals to Employees](#)
- [Copying Goals](#)
- [Acceptance Criteria](#)
- [Archiving your Team's Old Goals](#)

Annual Performance Reviews

The objective is to demonstrate and guide users through all steps required for completing the Annual Performance Review in Workday. The actions listed in this guide apply to each user involved in the completion of the performance review process: Teammate, People Leader, and Indirect People Leader users.

- [Complete the Set Content Step – People Leader](#)
- [Complete the Self Review Step – Teammate](#)
- [Complete the Manager Evaluation – People Leader](#)
- [Approve the Performance Review – Indirect People Leader](#)
- [Initiate To Do Task – People Leader](#)
- [Acknowledge the Performance Review – People Leader](#)
- [Acknowledge the Performance Review – Teammate](#)
- [Add or Remove Goals to Performance Review](#)
- [Send Back Performance Review](#)

Manager Learner Enrollment

Used to enroll or drop a learner, from a self-enrolled or assigned course. Waive a learner from a campaign assignment. Mark learner as completed for course.

- [Learner Self-Enroll](#)
- [Enroll Your Team](#)
- [Learner Self-Drop](#)

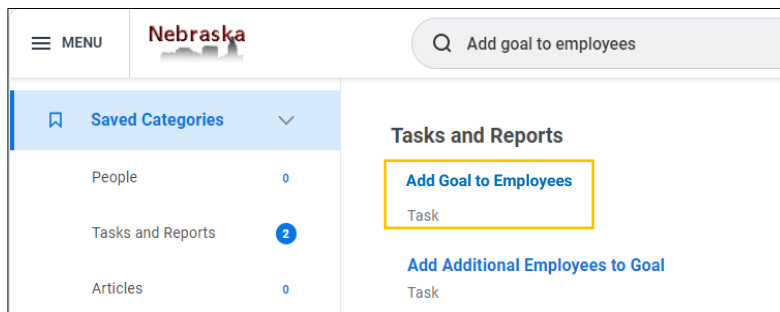
- [Batch Drop Enrollment](#)

Performance Goals

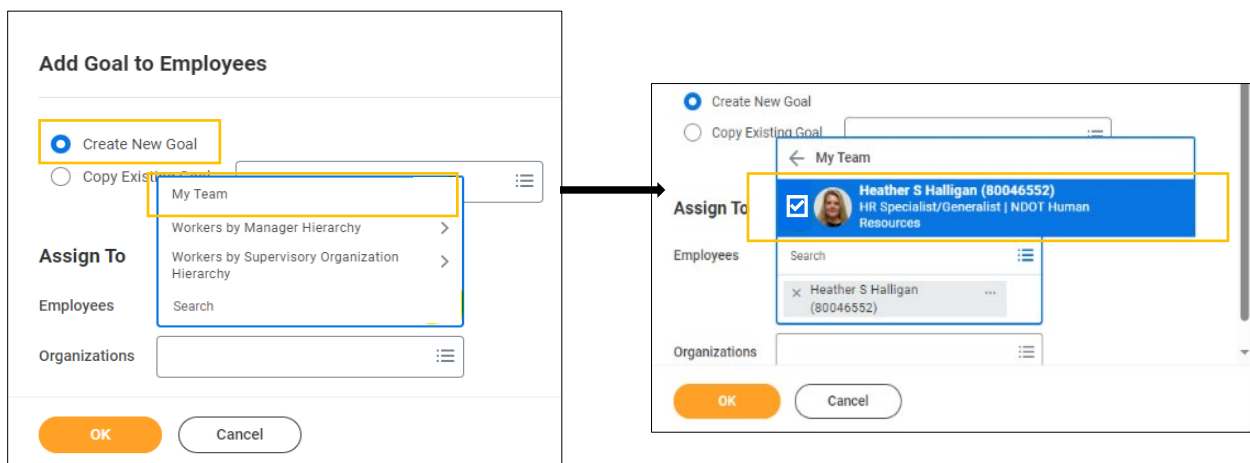
- [Add Goals to Employees](#)
- [Copying Goals](#)
- [Acceptance Criteria](#)

Add Goals to Employees

1. In Workday, enter **Add Goals to Employees** in the global search field located at the top of the page.
2. From the task list, select **Add Goals to Employees**.



3. Enter **Add Goals to Employees** details:
 - a. Select **Create New Goal**.
 - b. **Employees**: Select **My Team**, then select the team member(s) to be assigned to the goal.



4. Click **OK**.

5. Enter **Add Goals to Employees** details. NOTE: The red astriks (*) denotes a required field. The **Goal**, **Category**, and **Due Date** fields must be filled in to be included in the performance review.
- *Goal**: Enter the title/goal statement.
 - Description**: Enter the goal description.
 - *Category**: Select **Annual Performance Goal**.
 - Weight**: Enter the goal weighting percentage.
 - *Due Date**: Enter the due date for the goal.
 - Editable**: Check this box. This will allow you to create additional goals to assign to the selected team member(s).

The screenshot shows a form titled "Assign To" with a count of 3. It contains several fields for defining a goal:

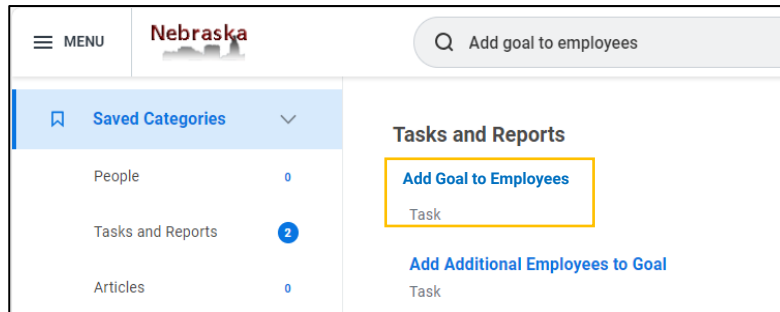
- Goal**: A required field (marked with a red asterisk) containing the text "Demonstrate how a people leader can create and assign a SMART goal to multiple team members at once." It has a rich text editor toolbar above it.
- Description**: A field containing a bulleted list of instructions: "Document the steps on how a people leader can create and assign creating and assigning a performance goal to more than one team member at the same time", "Explain fields which need to be filled out", and "Emphasis on the importance of filling in both the Category field and the Due Date field. This will allow them to be included in the annual performance review." It also has a rich text editor toolbar.
- Category**: A dropdown menu showing "Annual Performance Goal" with a close button and a menu icon.
- Weight**: A text input field containing the number "25".
- Due Date**: A date picker field showing "12/31/2023".
- Editable**: A checkbox that is checked.

At the bottom of the form, there are two buttons: "Remove" and "Add".

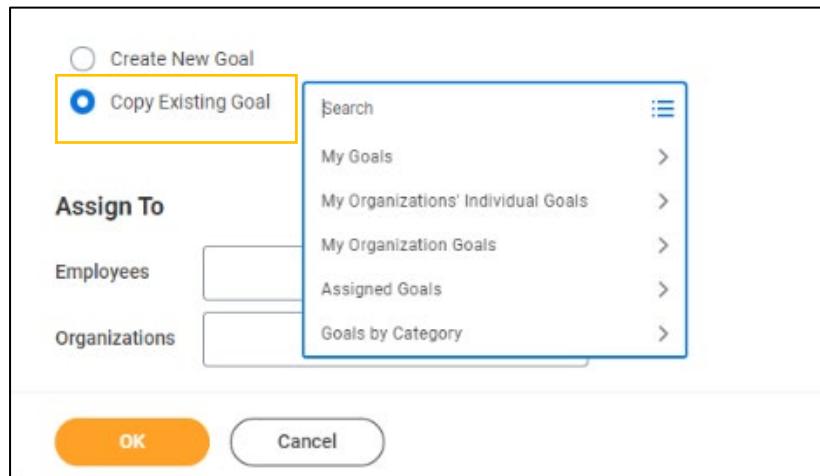
- Click **Add** to add another goal, or click **Remove** to delete the goal.
- Click **Submit** at the bottom of the page to finalize the goal process and assign to selected team member(s)

Copying Goals

1. In Workday, enter **Add Goals to Employees** in the global search field located at the top of the page.
2. From the task list, select **Add Goals to Employees**.



3. Select **Copy Existing Goal**.



4. In the box next to **Copy Existing Goal**, type in the goal you wish to copy or select the box to see the available dropdowns containing goals you can add. **NOTE:** You may add more than one goal to copy in this box. To do this, select all the goals you wish to copy to the upcoming year in this step.
 - a. To assign your own goals, select **Goals by Category**, then **Annual Performance Goals**.
 - b. To assign goals from a member of your team, select **My Organizations' Individual Goals**.

5. Under the **Assign To**, you can assign a goal to:
 - a. **Employees**: enter the name of the specific teammate(s).
 - b. **Organizations**: enter your name to assign goals to all your direct reports. To assign to your direct **AND** in-direct reports, check the box next to **Include Subordinate Organizations**.

Include Subordinate Organizations

NOTE: You cannot assign a goal to yourself this way. To assign a goal to yourself, enter **My Goals** in the global search bar and manually copy/paste your goals into a new goal.

6. Click **OK**, then you will be able to see how many teammates this goal will be assigned to at the top of the page.

Add Goal to Employees

Assign To 1

7. Review all goal content, adjust **Dates, Deadlines, Details**, etc., to be applicable to the upcoming performance evaluation period.

- a. **Category**: verify or select **Annual Performance Goal**.
- b. **Weight**: Enter a number. **NOTE:** Weights for all annual goals must sum to 100.
- c. **Due Date**: Update to **12/31/202_ (upcoming year)**.

Category x Annual Performance Goal

Weight 15

Due Date 12/31/2025

8. Review all copied goals:

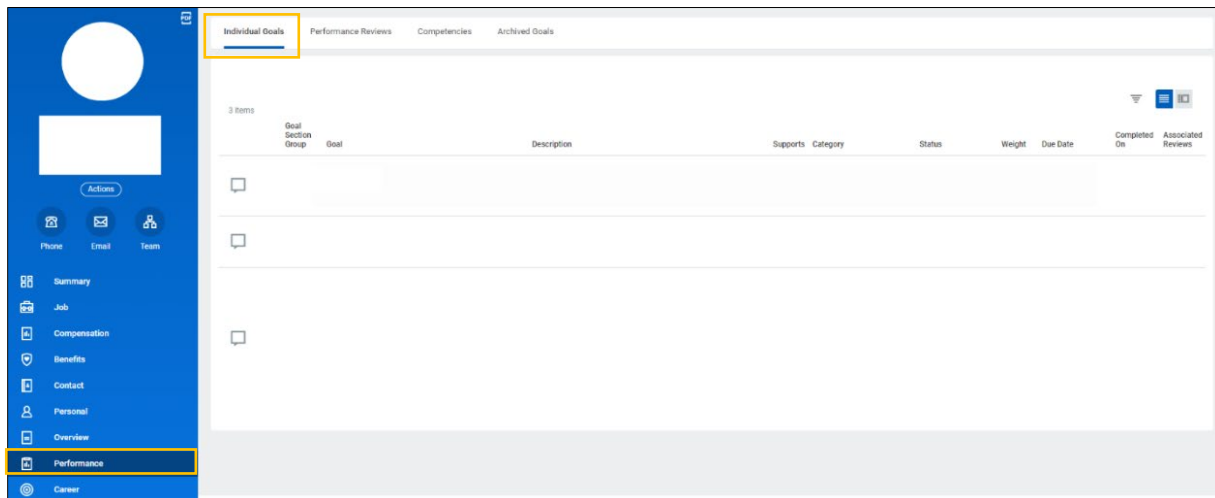
- a. **Goal Title** – Verify is it accurate and reflective of the goal.
- b. **Description** –
 - i. Verify the description of the goal is accurate.
 - ii. All dates have been changed to apply to the upcoming performance evaluation period.
 - iii. Verify that the goals are in SMART format – Specific, Measurable, Attainable, Relevant, and Time-Bound
- c. **Category** – Verify that **Annual Performance Goal** is selected.
- d. **Weight** – Verify the that all goals sum to 100.
- e. **Due Date** - Verify that is says **12/31/202_ (upcoming year)**.

9. Click **Submit**.

Acceptance Criteria

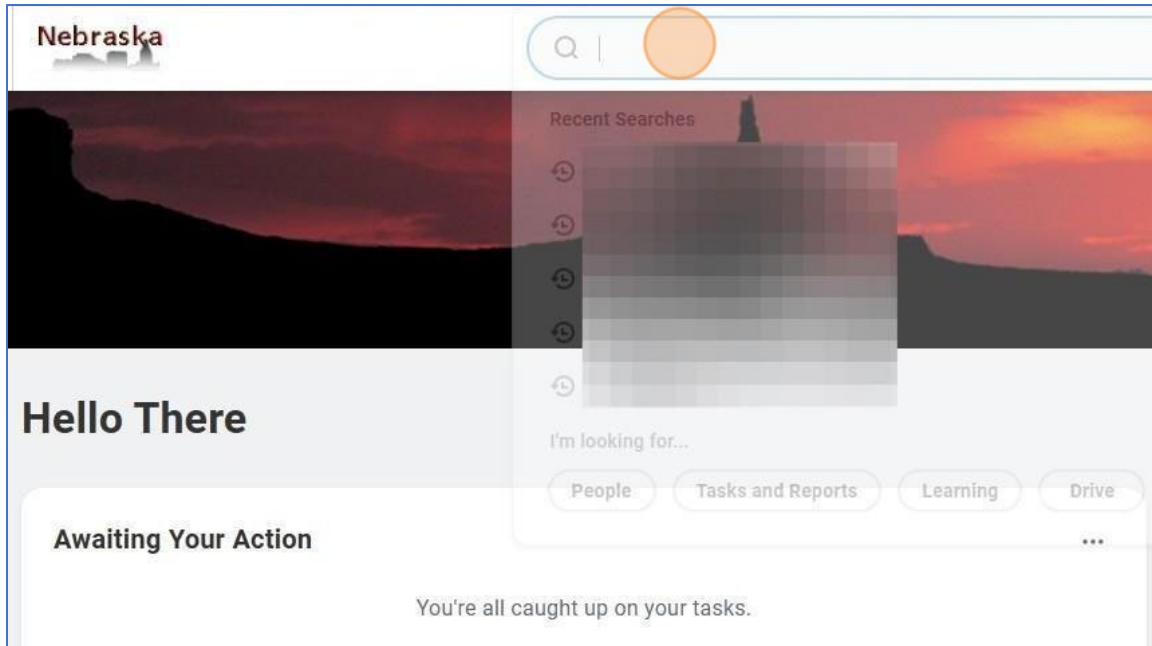
To verify that you have successfully added goals for your team member(s):

1. Click the **Menu** button located in the top right corner of the page.
2. Select **My Team**, then one of the team members to whom you assigned the goal. You can also enter and select the team member but typing their name into the global search field.
3. In the team member Profile, select **Performance**.
4. Confirm the goal(s) are displayed under the Individual Goals tab.

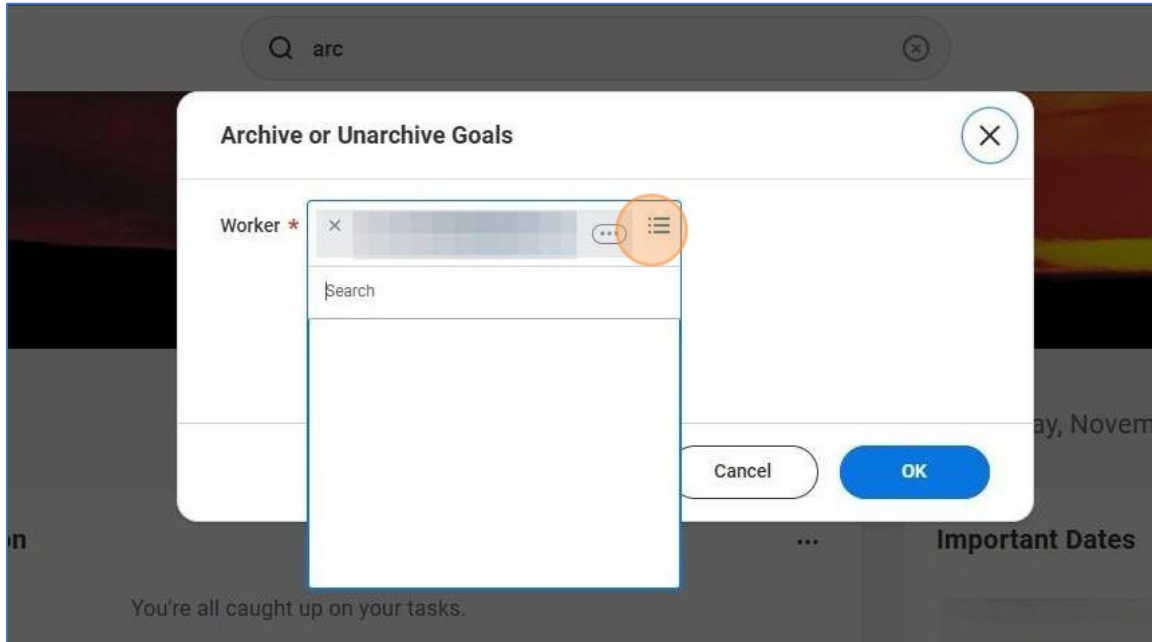


Archiving your Team's Old Goals

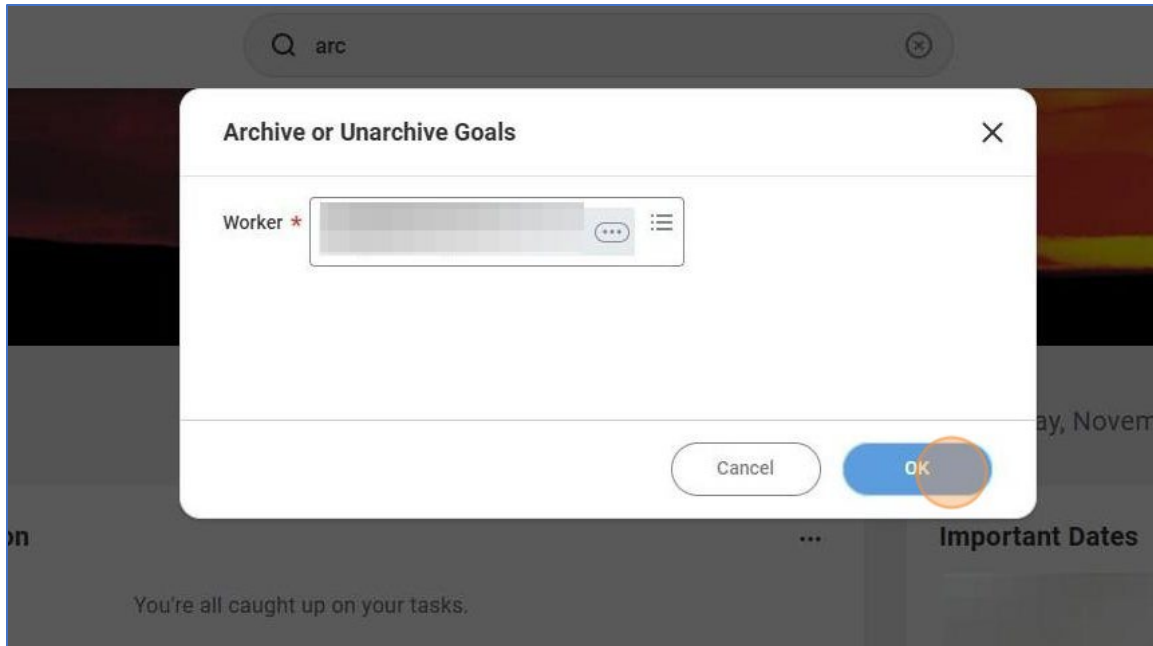
1. Navigate to Workday
2. Click the **Search** field.



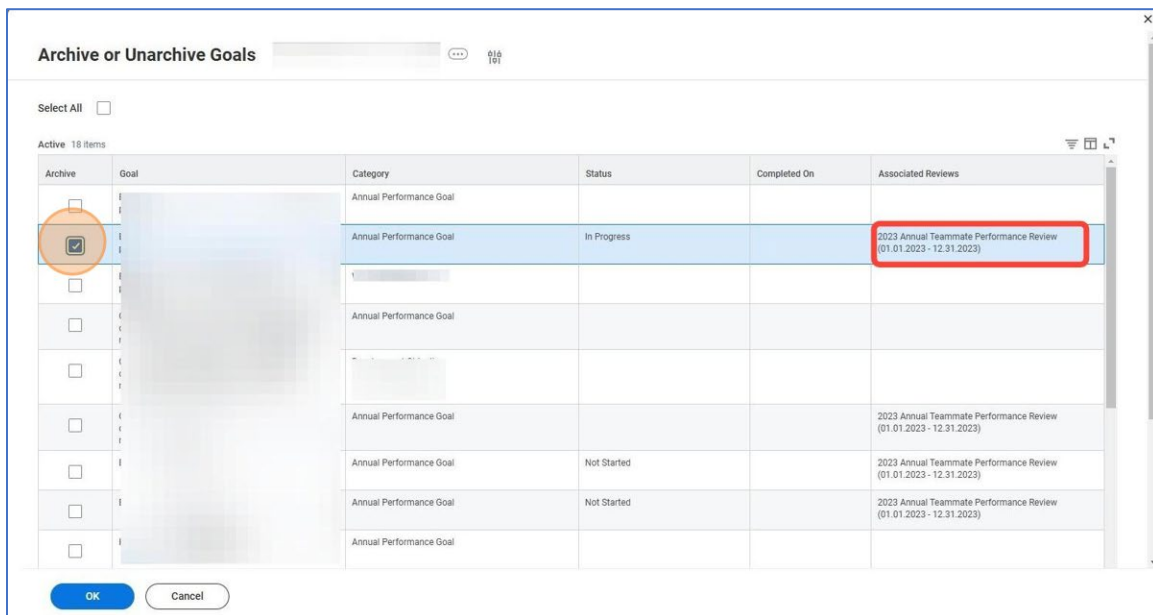
3. Type **Archive Goals**
4. Click the hamburger icon to open the dropdown menu in order to select teammates other than yourself, then go to the **My Team** option. You can only archive goals for one teammate at a time.



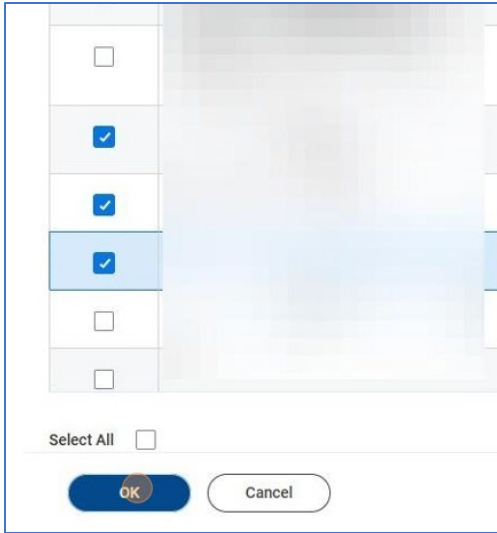
5. Click **OK**



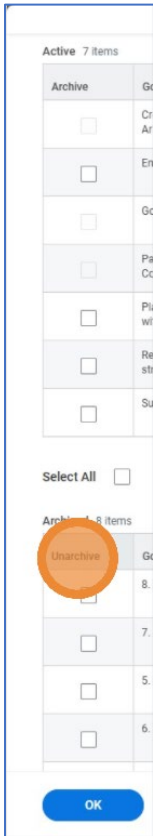
6. Click on goals that have associated performance reviews in the far right column.
***Note: ONLY ARCHIVE GOALS YOU ARE NOT CURRENTLY BEING EVALUATED ON OR WILL BE EVALUATED ON IN AN UPCOMING PERFORMANCE EVALUATION. Archived goals cannot appear on a performance evaluation. Double check you are archiving the right goals.**



7. Click **OK**

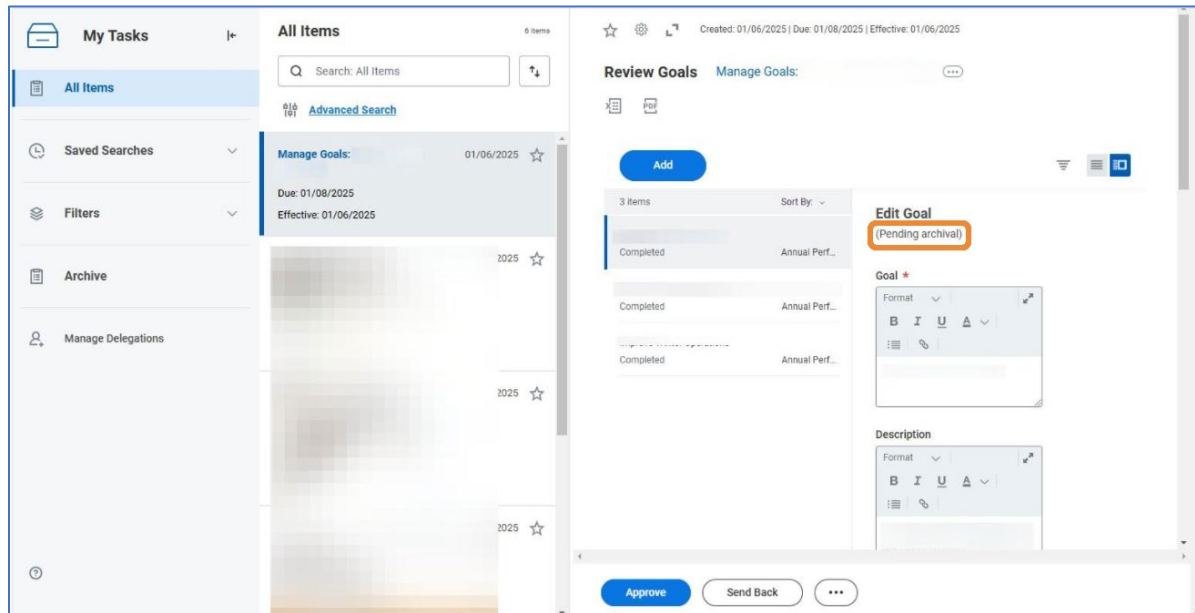


8. To unarchive goals, you can repeat this same process, but select from the **Unarchive** list



***Note: if you archive your teammate's goals, there is no approval process. If your teammate archives their own goals, they will come to you for approval. It will look like a**

regular Manage Goals task, but will note that it's for archival above the goal for approval

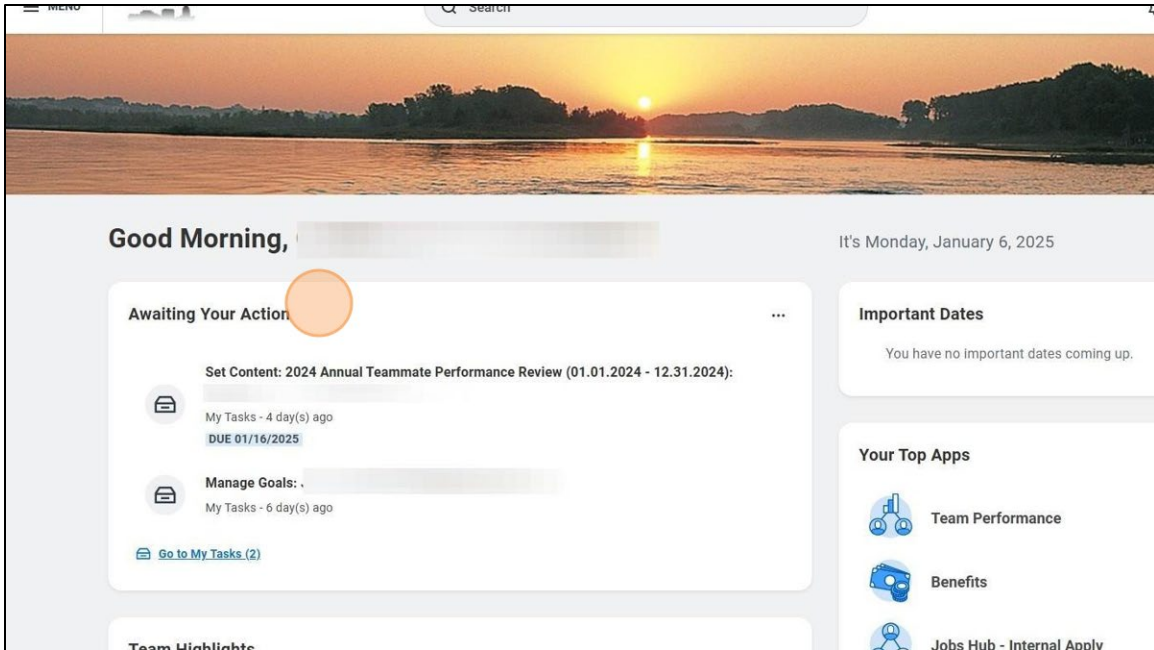


Annual Performance Reviews

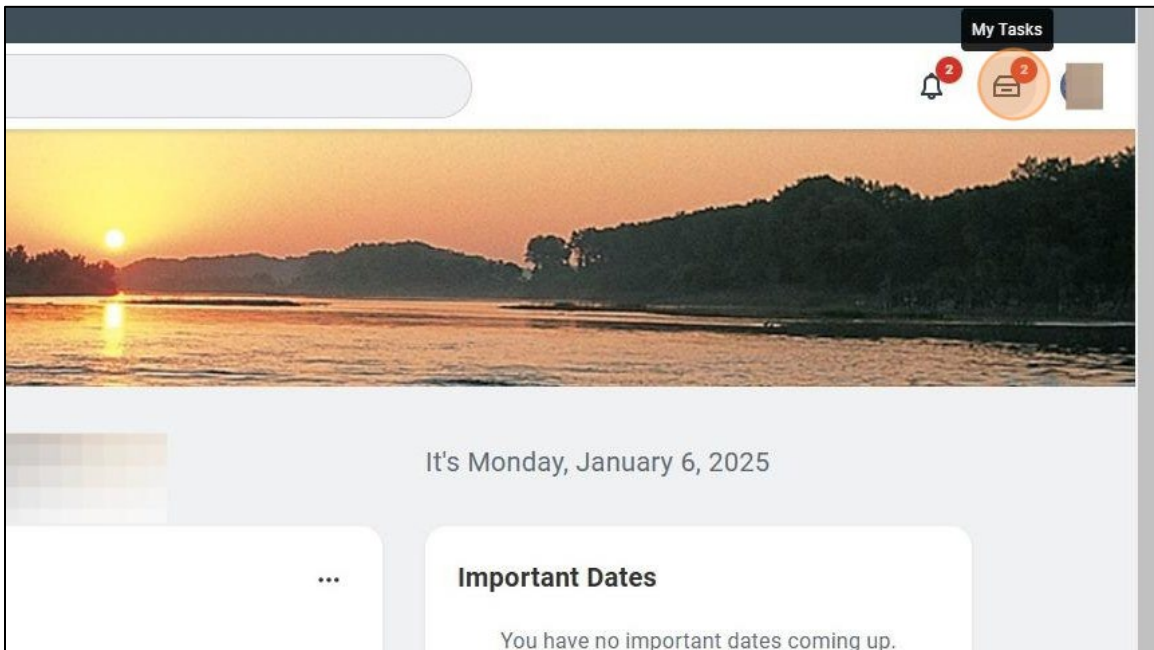
- [Complete the Set Content Step – People Leader](#)
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Complete the Set Content Step | For People Leaders

1. Navigate to your Workday homepage
2. Click either on the task in the Awaiting Your Action box on your homepage:



Or click on **My Tasks** in the top right corner to go to your Inbox:



3. Click on the **Set Content** task for your teammate.

my tasks

Search: All Items

Advanced Search

Set Content: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31.2024): [redacted] 01/02/2025 ☆

Due: 01/16/2025

Effective: 12/31/2024

Manage Goals: [redacted] 12/30/2024 ☆

Effective: 12/30/2024

Review Period 01/01/2024 -

PEOPLE LEADER:
On the following pages you are assigned to your direct report t

Required Actions:

- Enter the correct weighti being assessed on. Each Teammate Competencie
- Confirm that all eligible a SMART Goal section. Ent tain they total 100%
- Once these actions are c evaluation.

A user guide job aid covering al To access the user guide click: **Guides** page, scroll to the **Syste** pand. Scroll to the Talent sectio job aid.

4. Click **Get Started**

Manage Goals: [redacted] 12/30/2024 ☆

Effective: 12/30/2024

- Confirm that all eligible annual SMART goals were processed into the re SMART Goal section. Enter the appropriate weighting percentage for each tain they total 100%
- Once these actions are completed submit the review so your direct repo evaluation.

A user guide job aid covering all steps of the annual review process is available To access the user guide click: [Annual Performance Review job aid](#). Once you **Guides** page, scroll to the **System Users Guides** section. Click on **Workday - Re** pand. Scroll to the Talent section and open the **Complete Annual Performance** job aid.

No additional actions will be needed on your part until you are notified to begin ments once your direct report has completed their self-evaluation step.

Click **Get Started** to begin.

Get Started

5. There is nothing you need to do on the first page. Click **Next**

Competencies

Start Goals

Leader

Submit

Question What is your other top competency as a teammate, and why do you believe this?

Question As a teammate, identify a competency you would like to improve upon and why you f

Question A job related accomplishment from the last calendar year which I am most proud of:

Question Do I have the necessary tools to do my job?

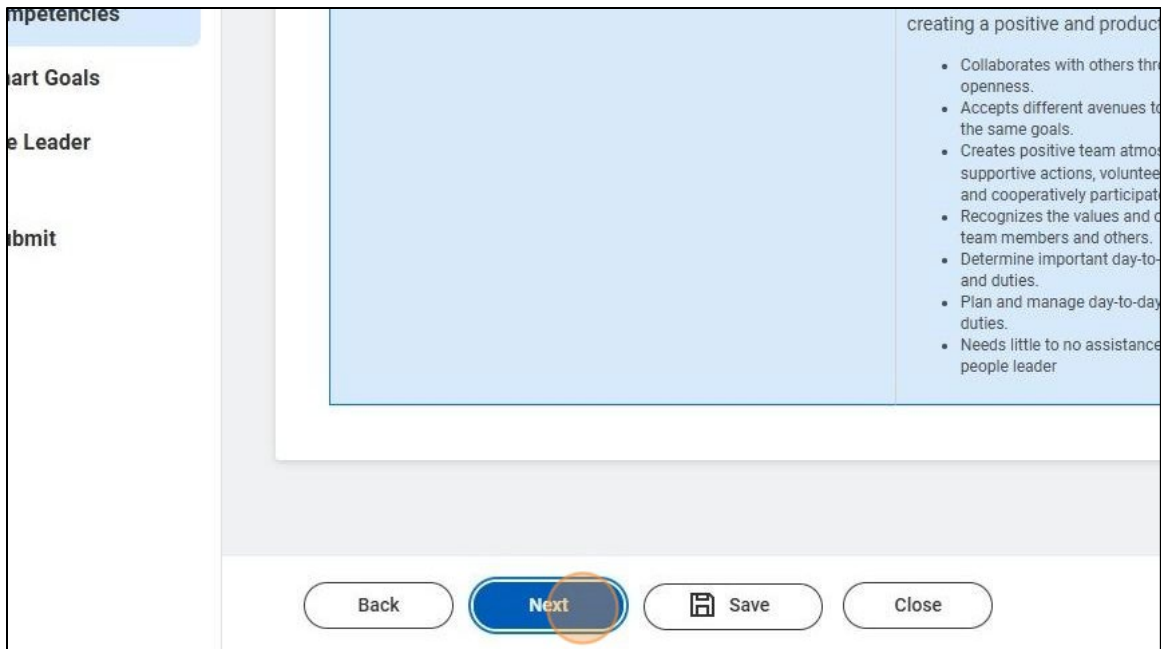
Back Next Save Close

6. Click into each Competency and change the weight to "20"

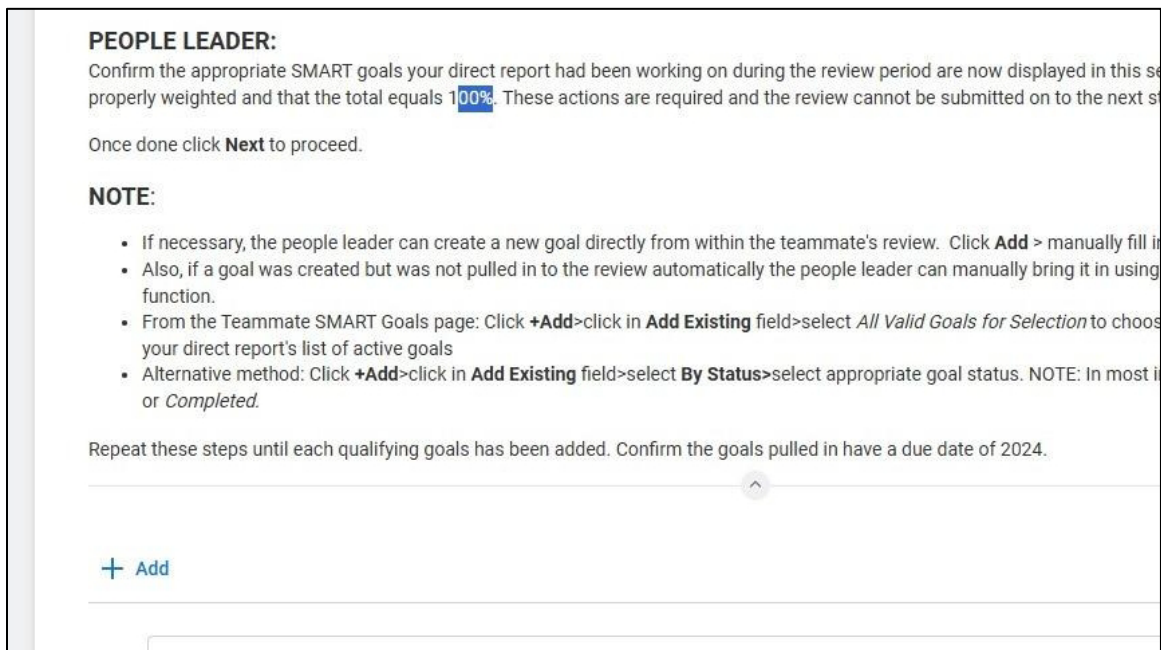
	Description	Weighting
	<p>Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable attendance.</p> <ul style="list-style-type: none"> • Demonstrates knowledge of position including deadlines. • Takes steps to resolve issues or errors in work. • Adheres to policies regarding work schedule and leave time. • Portrays dependability, including regular and reliable attendance. 	<input type="text" value="20"/>
	<p>Demonstrates a high degree of adaptability to change and focus on progress. Initiates innovative improvements both in reaction to change and in anticipation of shifting customer need, business process and priorities, or available resources.</p>	<input type="text" value="20"/>

Save Close

7. Click "Next"



- On the **SMART Goals** page, confirm the appropriate SMART goals your direct report had been working on during the review period are now displayed in this section. Also confirm that their combined weights equals 100%.



- In this example, there are four goals with a weight of 20 each. This does not add up to 100%. Therefore, you should adjust the weights to equal 100%.

Due Date 12/31/2024

Category × Annual Performance Goal

Supports

Status In Progress

Weighting 20

> History

Back Next Save Close

10. Once you have confirmed that all the teammates' 2024 goals are present and add up to 100%, click **Next**

Supports

Status In Progress

Weighting 25

> History

Back Next Save Close

11. There is nothing you need to do on the **Indirect People Leader comments** page. Click **Next**

Set Review Content

Set Content: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31....)

Actions

01/01/2024 - 12/31/2024

- Teammate Self-Evaluation
- Teammate Competencies
- Teammate Smart Goals
- Indirect People Leader Comments**
- Review and Submit

Indirect People Leader Comments

PEOPLE LEADER:
No action is required on your part at this time. Please click **Next** to proceed.

Question Indirect People Leader Comments

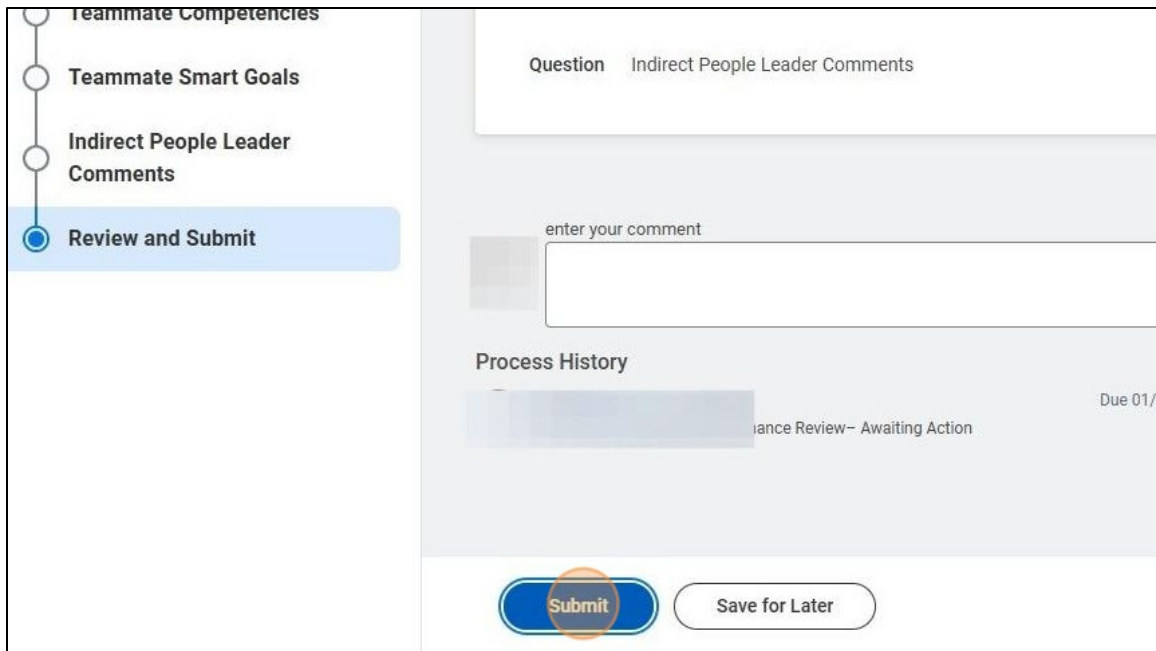
Back Next Save Close

12. On the **Review and Submit** page:

- Confirm the Competency weights are all set as 20
- Confirm all SMART goals are present
- Confirm all SMART goal weights add up to 100

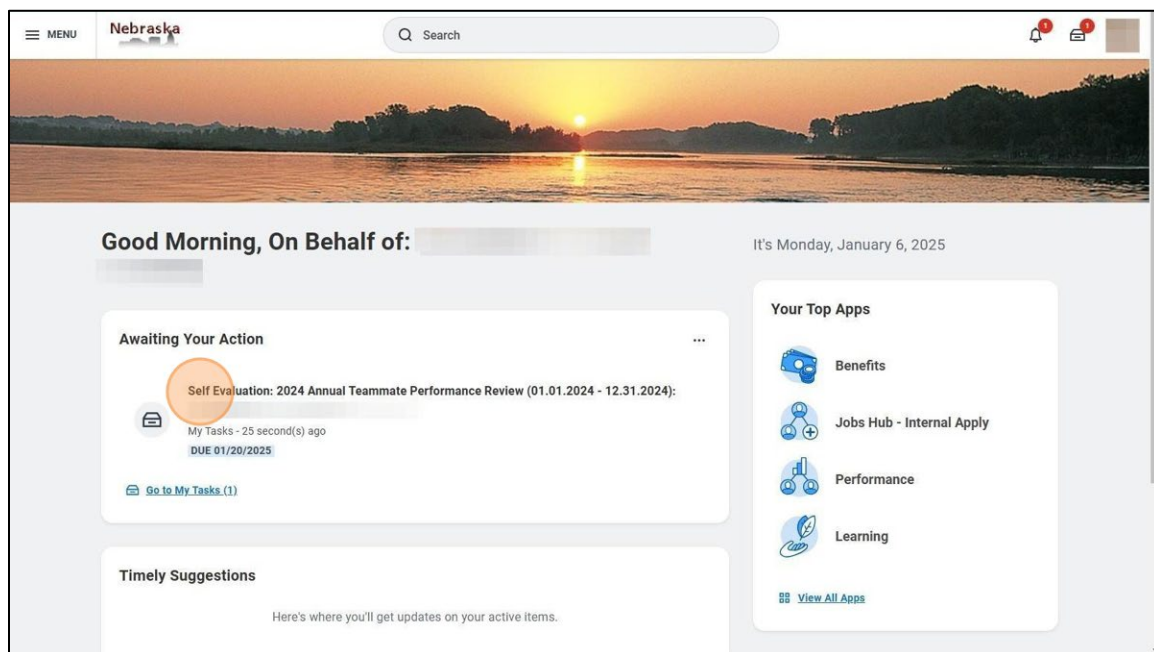
Description	Weighting
<p>Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable attendance.</p> <ul style="list-style-type: none"> Demonstrates knowledge of position including deadlines. Takes steps to resolve issues or errors in work. Adheres to policies regarding work schedule and leave time. Portrays dependability, including regular and reliable attendance. 	20
<p>Demonstrates a high degree of adaptability to change and focus on progress. Initiates innovative improvements both in reaction to change and in anticipation of shifting customer need, business process and priorities, or available resources.</p> <ul style="list-style-type: none"> Facilitates change. Adjusts to changing job duties. 	20

13. If everything is present and weighted correctly, click **Submit**

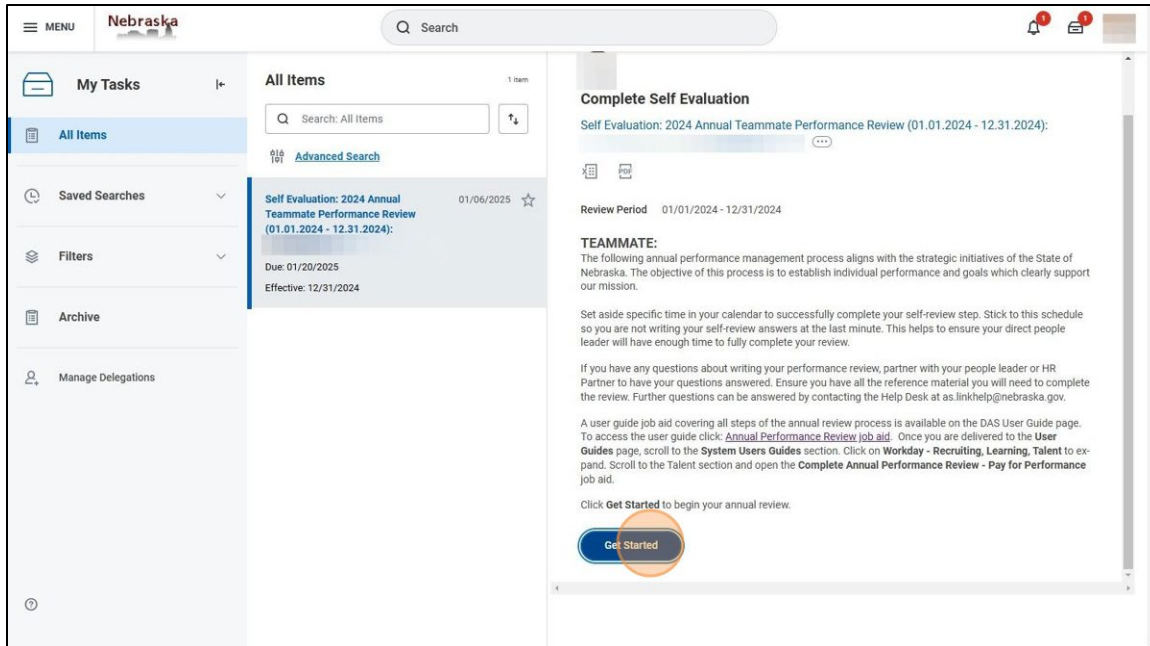


Complete the Self-Review Step | For Teammates

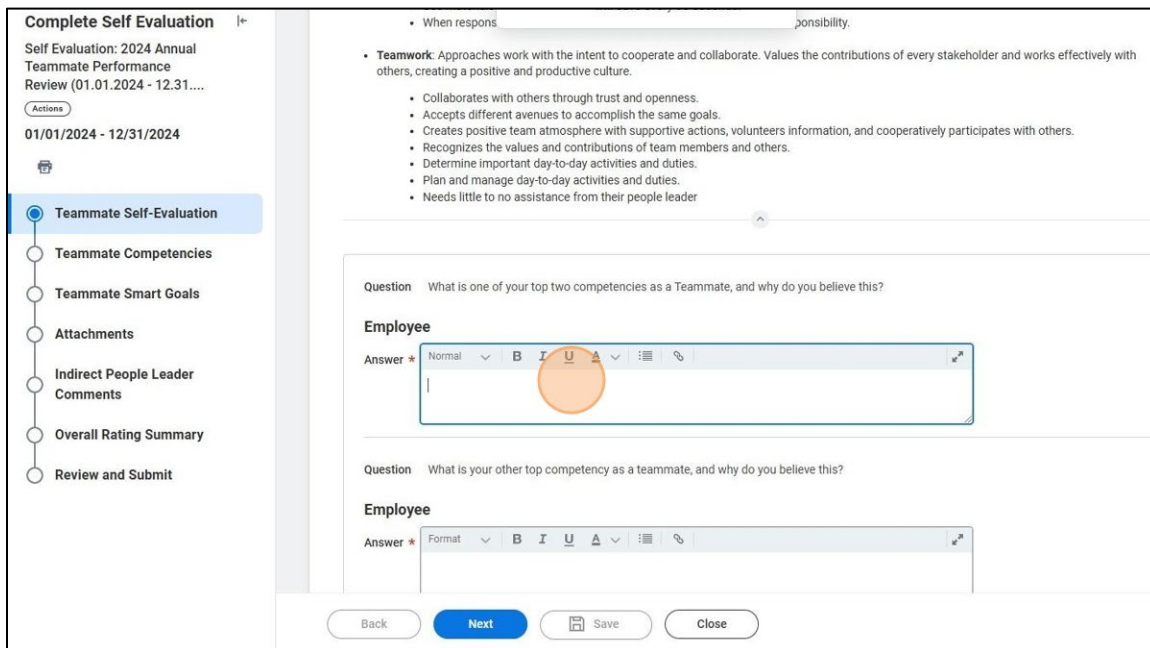
9. On your Workday homepage, click the **Self Evaluation** task in the Awaiting Your Action inbox.



10. Click **Get Started**



11. On the **Teammate Self-Evaluation** page, enter your answers for the Competency questions.



12. When you have entered all your answers, click **Next**

Competencies

Smart Goals

s

People Leader

ing Summary

Submit

Question Do I have the necessary tools to do my job?

Employee

Answer * Normal **B I U A** **:** **🔗**

Back **Next** **Save** **Close**

13. On the **Teammate Competencies** page, enter your responses for each Competency.

Complete Self Evaluation |-

Self Evaluation: 2024 Annual
Teammate Performance
Review (01.01.2024 - 12.31....)

Actions

01/01/2024 - 12/31/2024

- Teammate Self-Evaluation
- Teammate Competencies**
- Teammate Smart Goals
- Attachments
- Indirect People Leader Comments
- Overall Rating Summary
- Review and Submit

Teammate Competencies

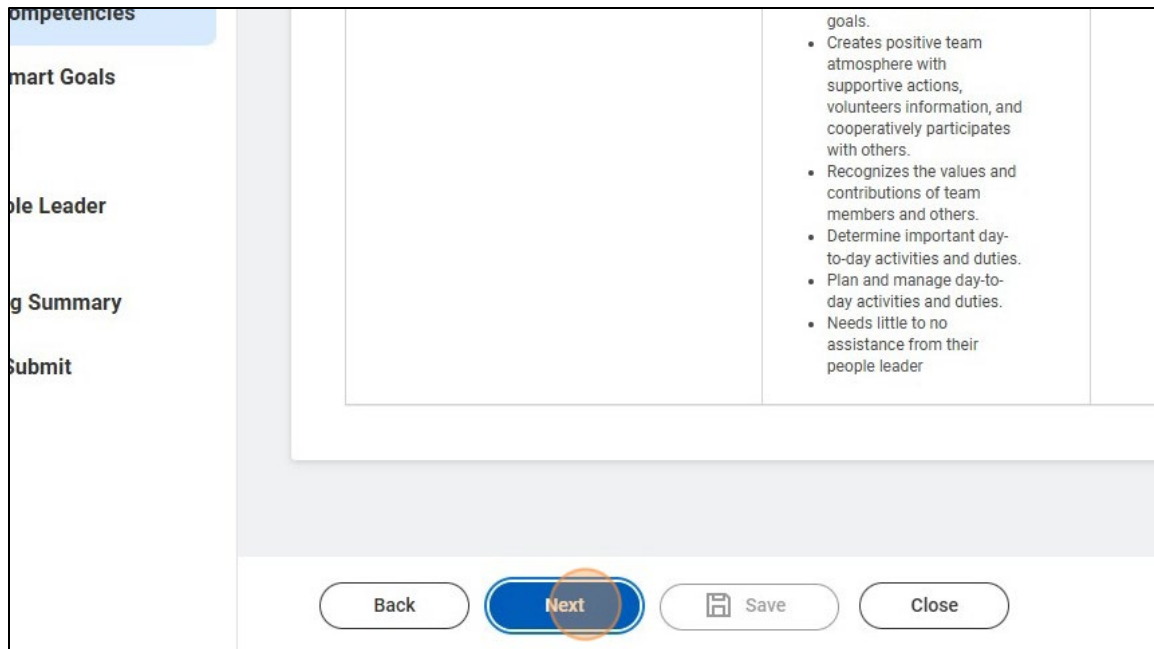
TEAMMATE:
In this section your people leader will be rating your performance regarding each of the five competencies. Comment boxes are available for you to enter additional information pertaining to each competency. This action is not required however you are strongly encouraged to do so. Any information you can provide will assist your people leader as they enter ratings and comments in your review.
Once finished, click **Next**, to proceed to the Teammate SMART Goal section.

5 items

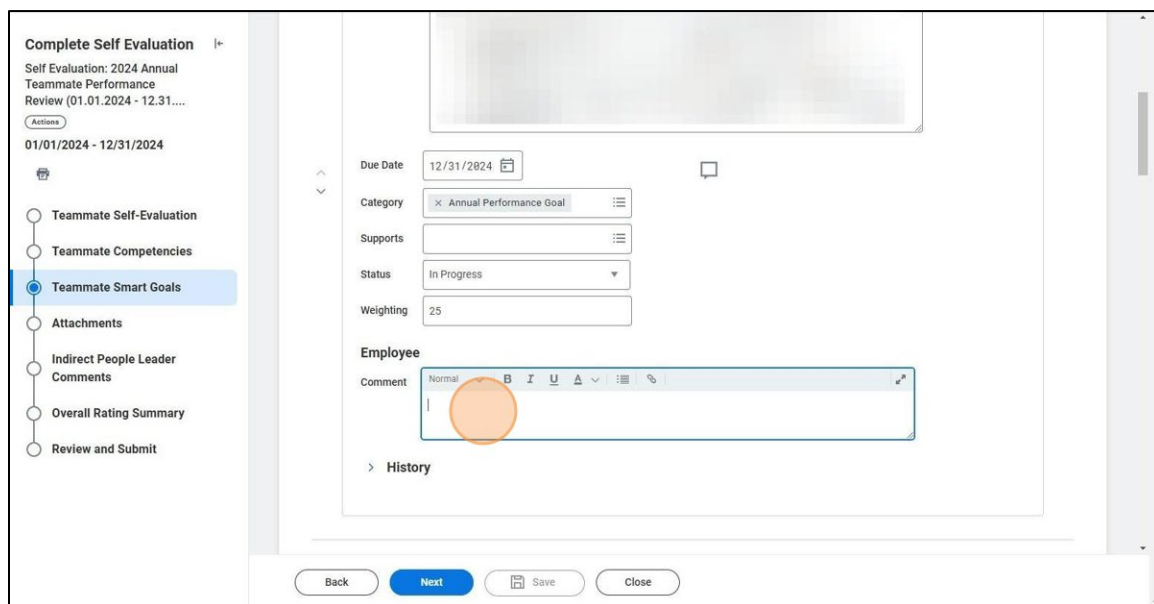
Competency	Description	Employee Evaluation
Accountable and Dependable	Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable attendance. <ul style="list-style-type: none"> • Demonstrates knowledge of position including deadlines. • Takes steps to resolve issues or errors in work. • Adheres to policies regarding work schedule and leave time. • Portrays dependability, including regular and reliable attendance. 	Comment
Adaptability	Demonstrates a high degree of	Comment

Back **Next** **Save** **Close**

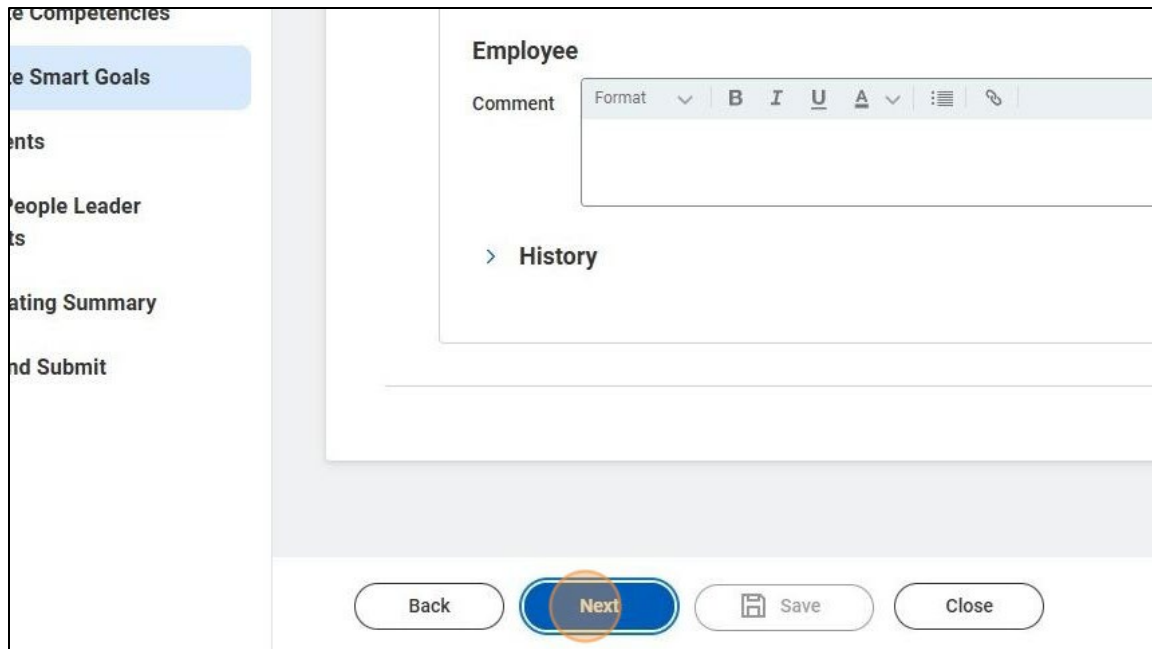
14. Once you have entered all your responses, click **Next**



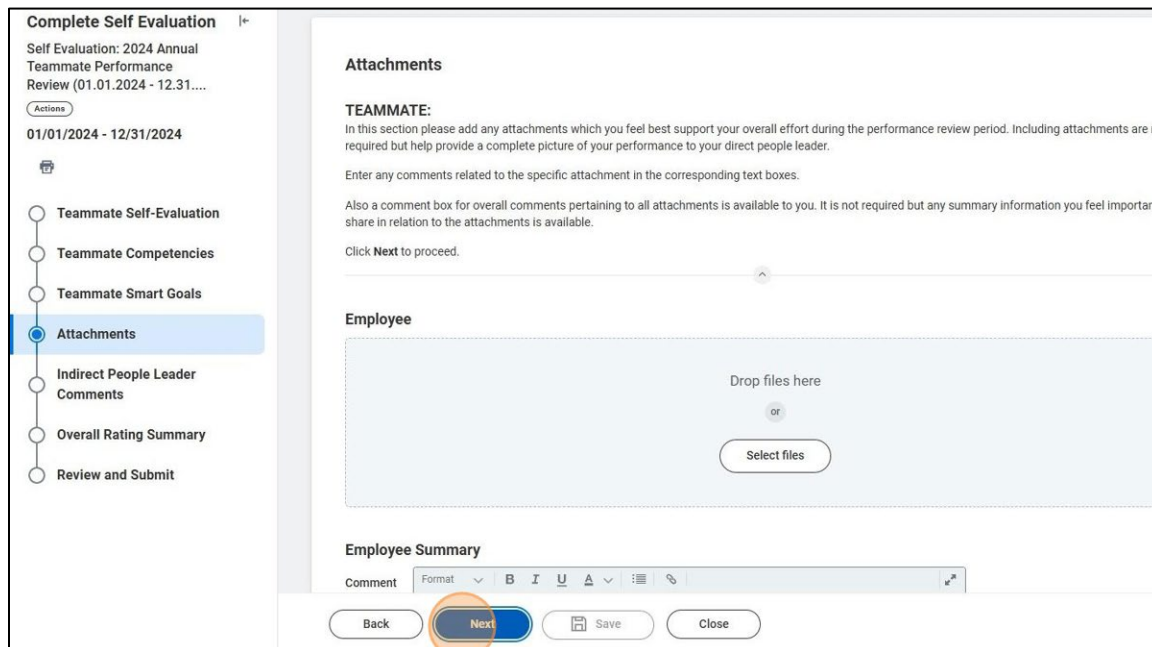
15. On the **Teammate Smart Goals** page, confirm that all your SMART goals for the year are present and the weights add up to 100. Then enter your comments following each goal.



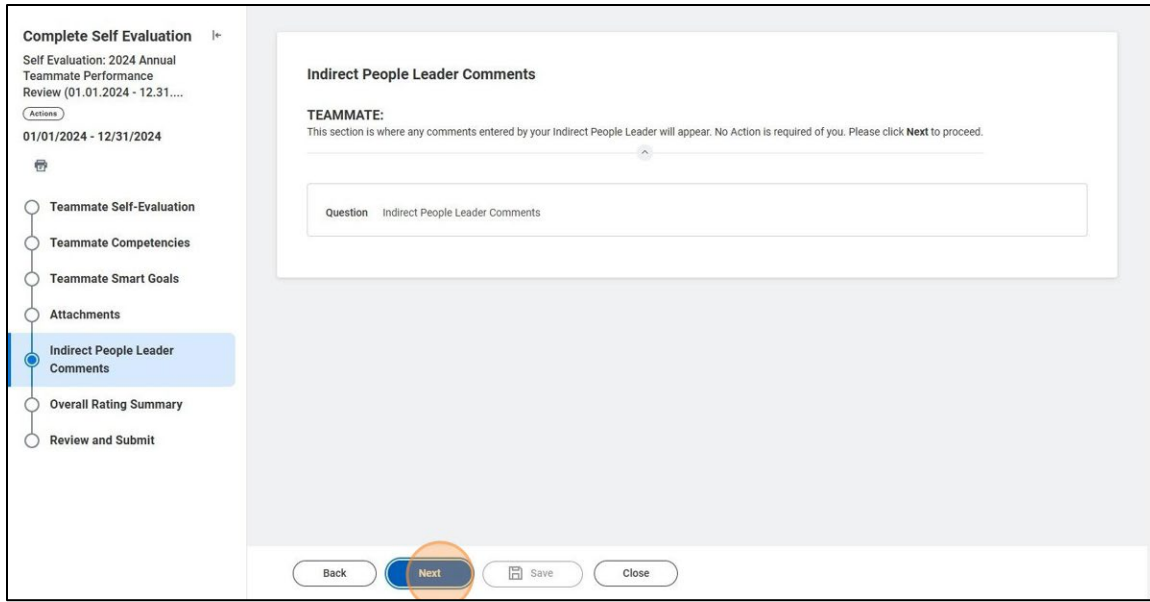
16. When you have entered all your comments, click **Next**



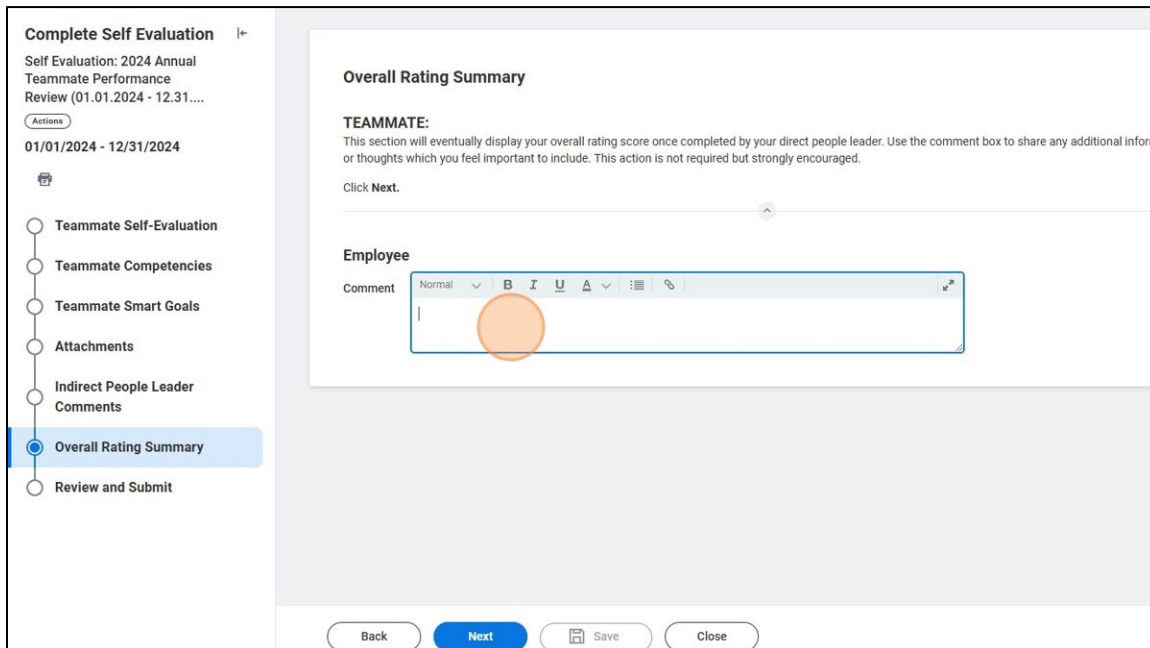
17. On the **Attachments** page, you may upload any supporting documentation regarding your performance throughout the year. Once you have uploaded your attachments, or if you do not wish to upload any attachments, click **Next**



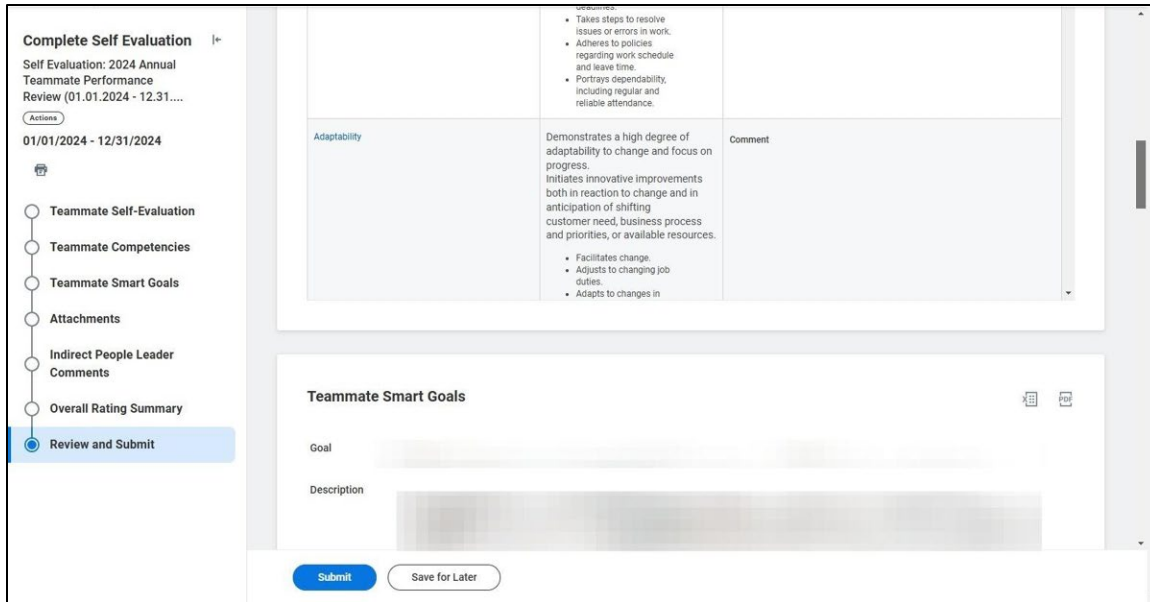
18. There is nothing you need to do on the **Indirect People Leader Comments** page. Click **Next**



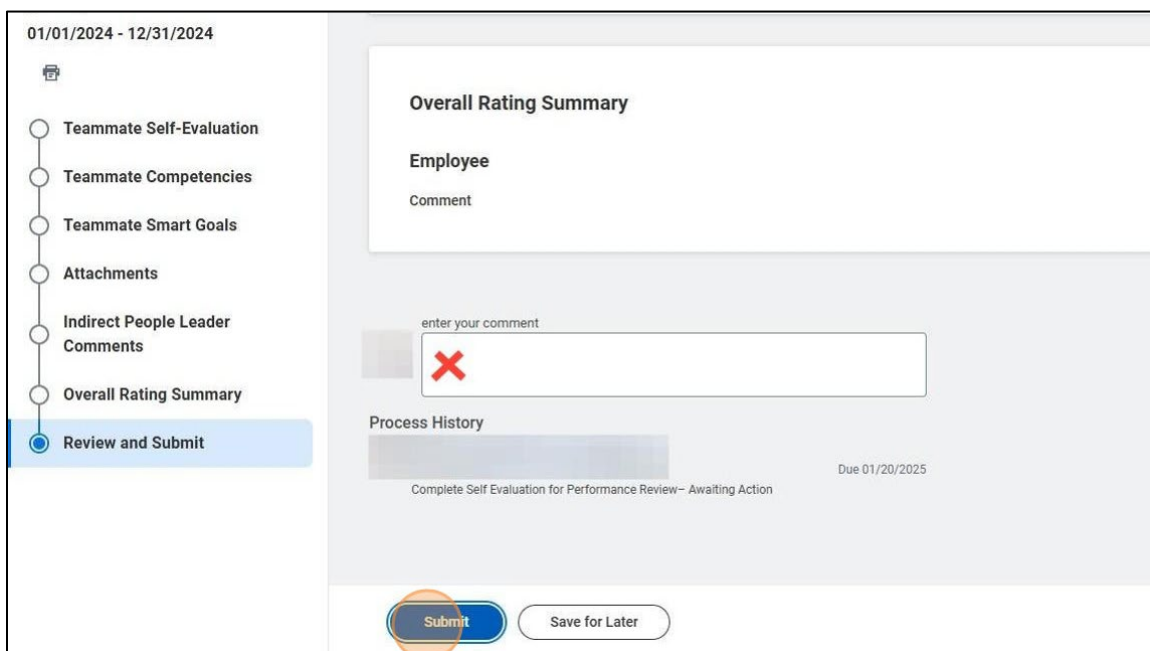
19. On the **Overall Rating Summary** page, enter any overall comments you have regarding your performance throughout the year. Once finished, click **Next**



20. On the **Review and Submit** page, review all your comments and confirm it all looks correct.

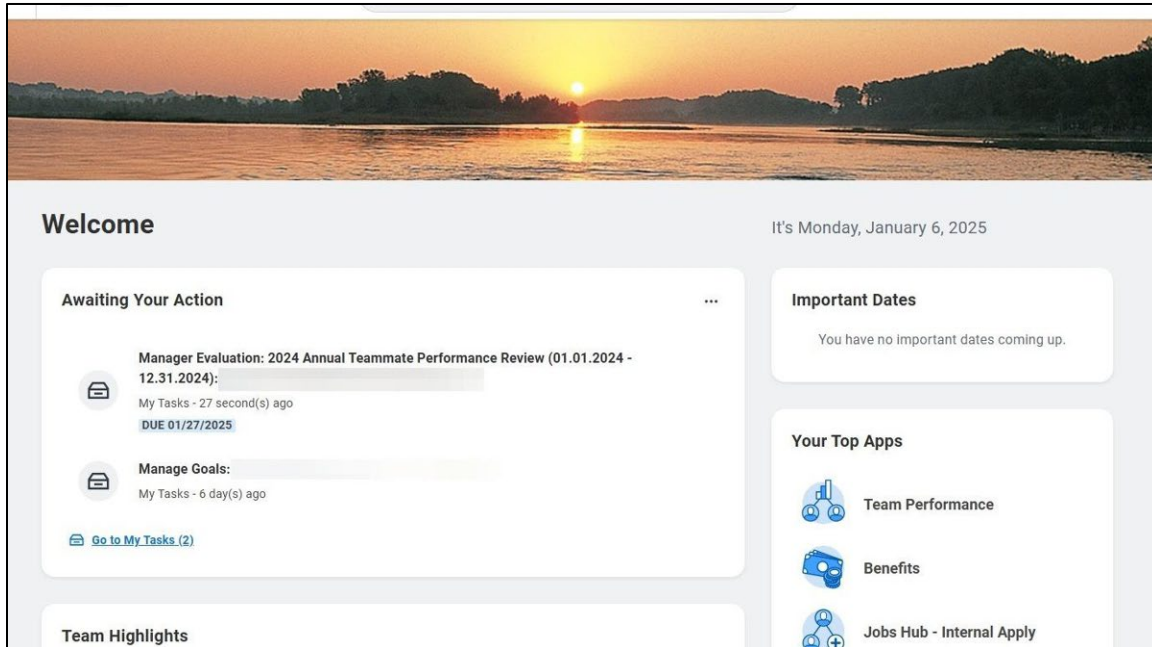


21. Click **Submit** to send your evaluation to the next step. You may save for later if you need to pause and return to the evaluation at a later time.
***Note:** do NOT enter your comments in the comment box with an X below. This comment box is a Workday process comment box and any comment entered there will not appear on your evaluation.

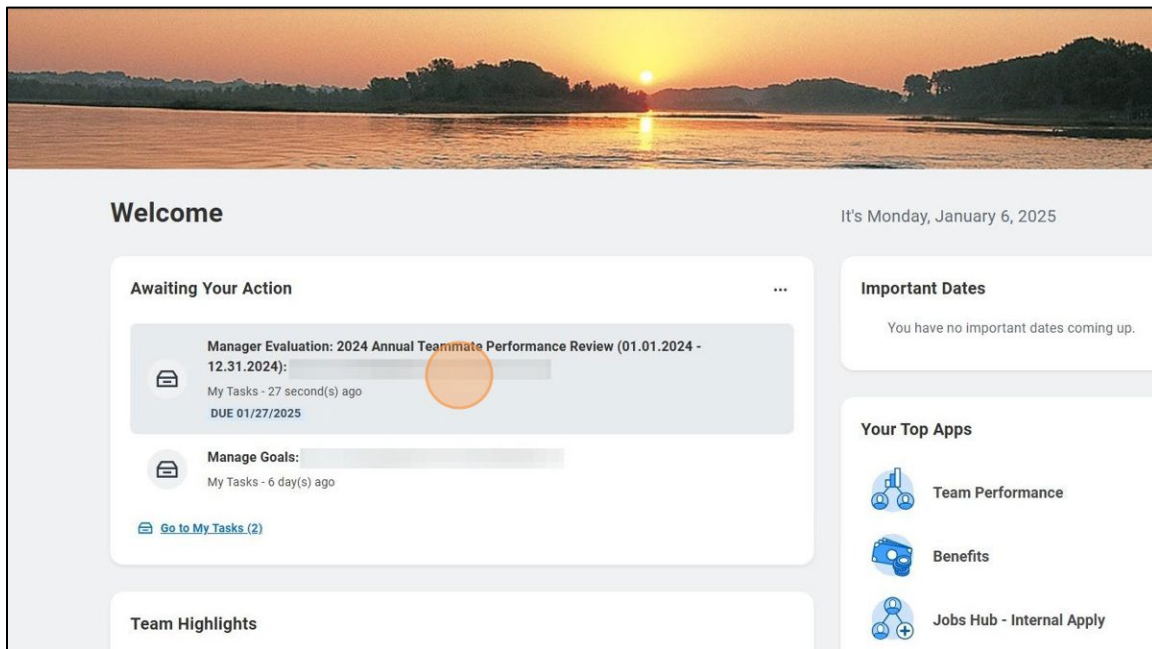


Complete the Manager Evaluation | For People Leaders

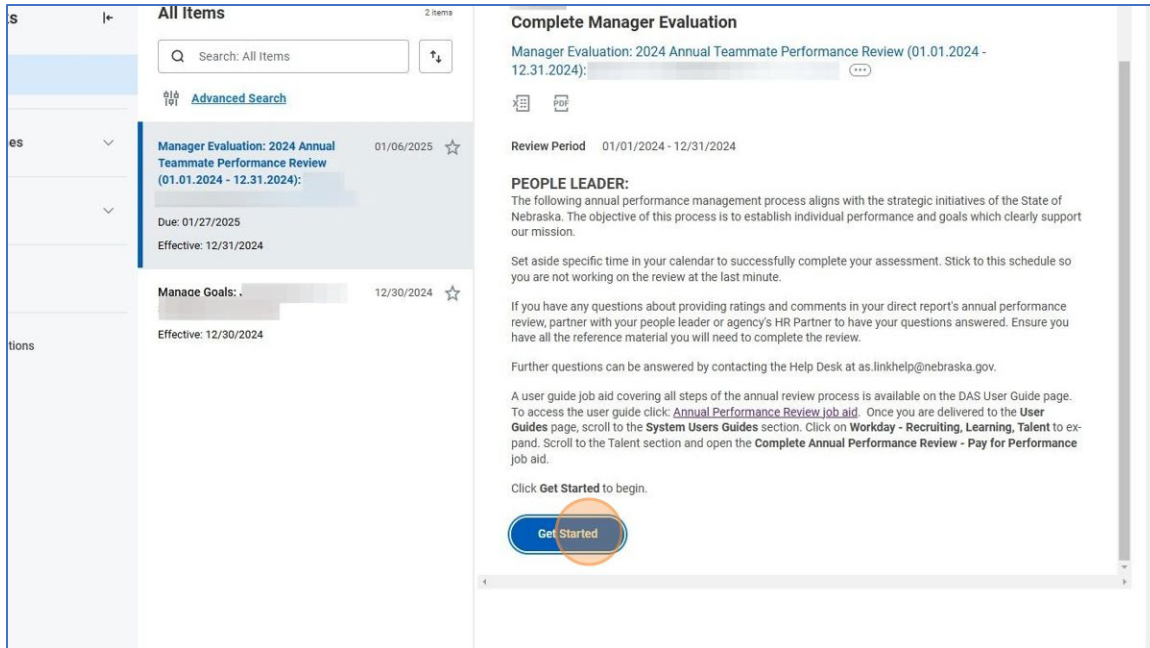
1. Go to your Workday homepage.



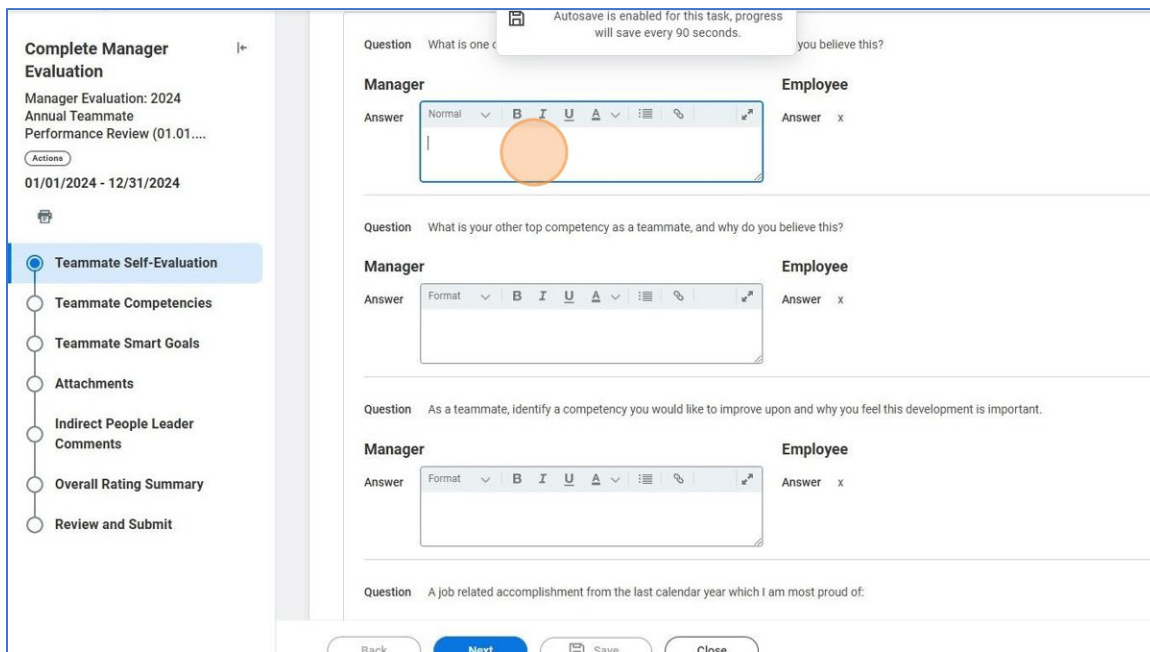
2. Select the **Manager Evaluation** task in your Awaiting your Action inbox.



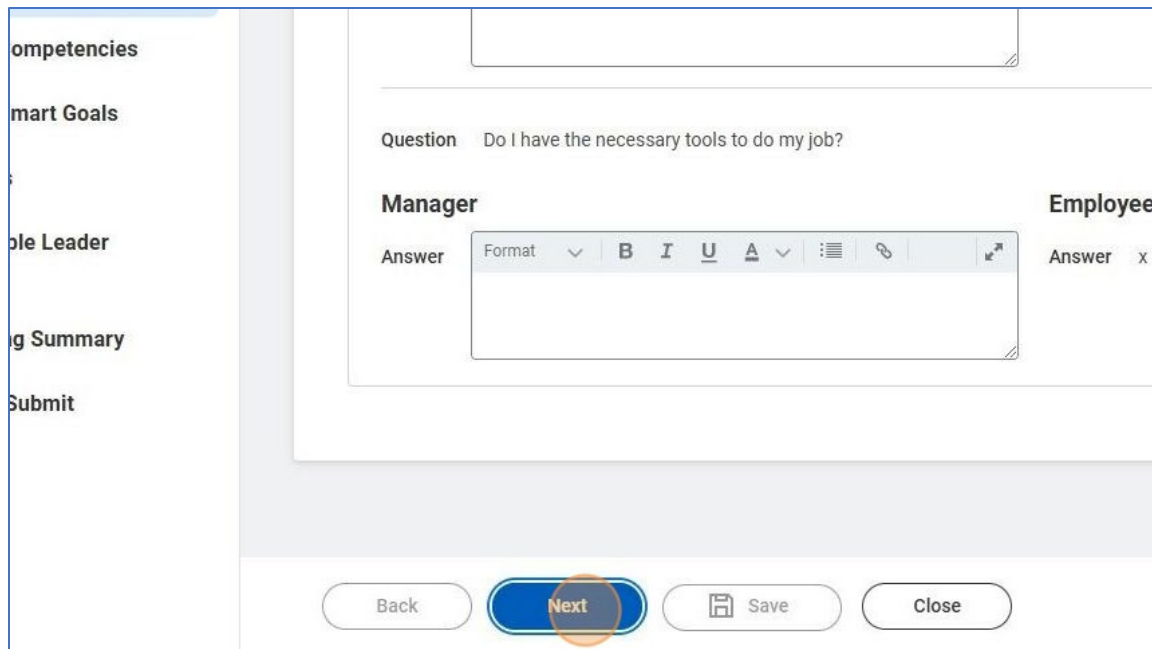
3. Click **Get Started**



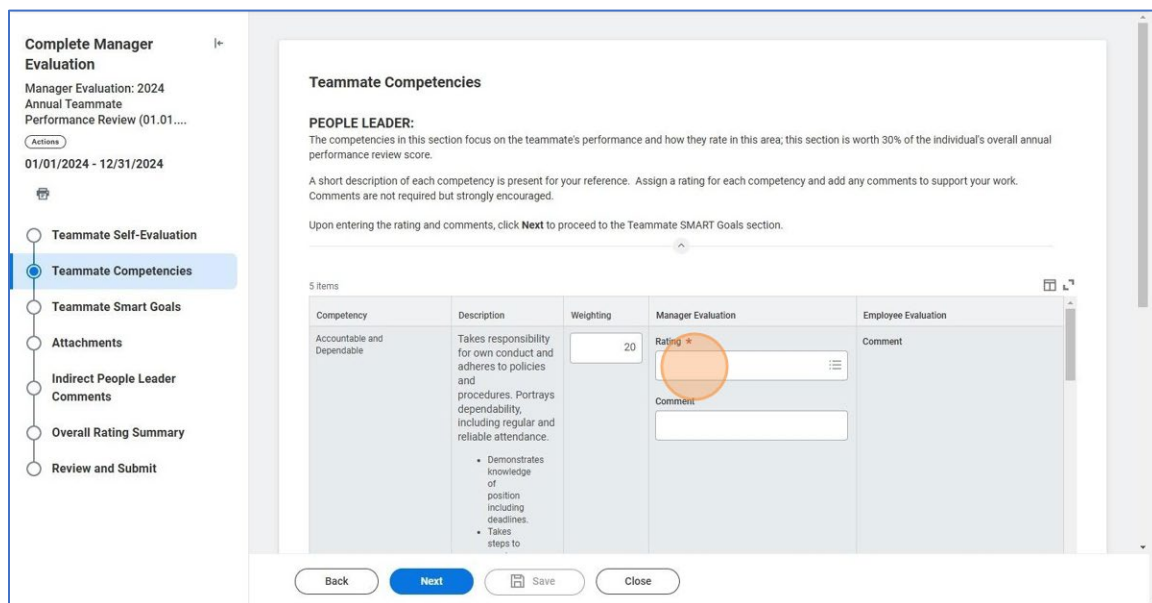
4. On the **Teammate Self-Evaluation** page, enter any comments you may have regarding the teammate's answers.



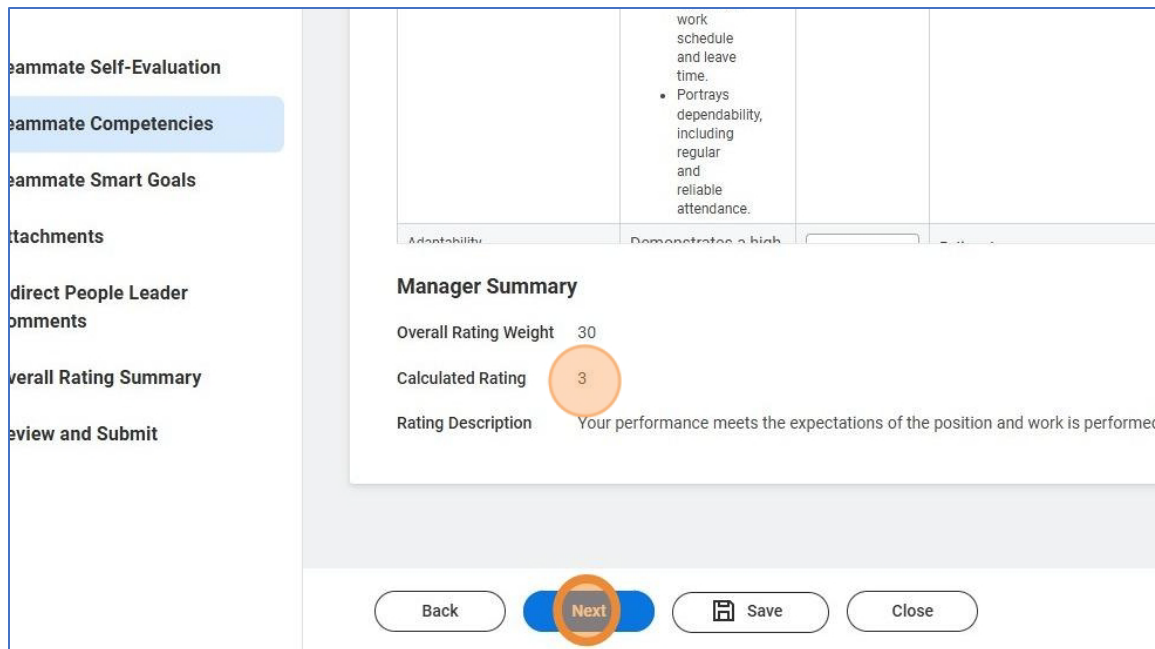
5. Once you have added all your comments, click **Next**



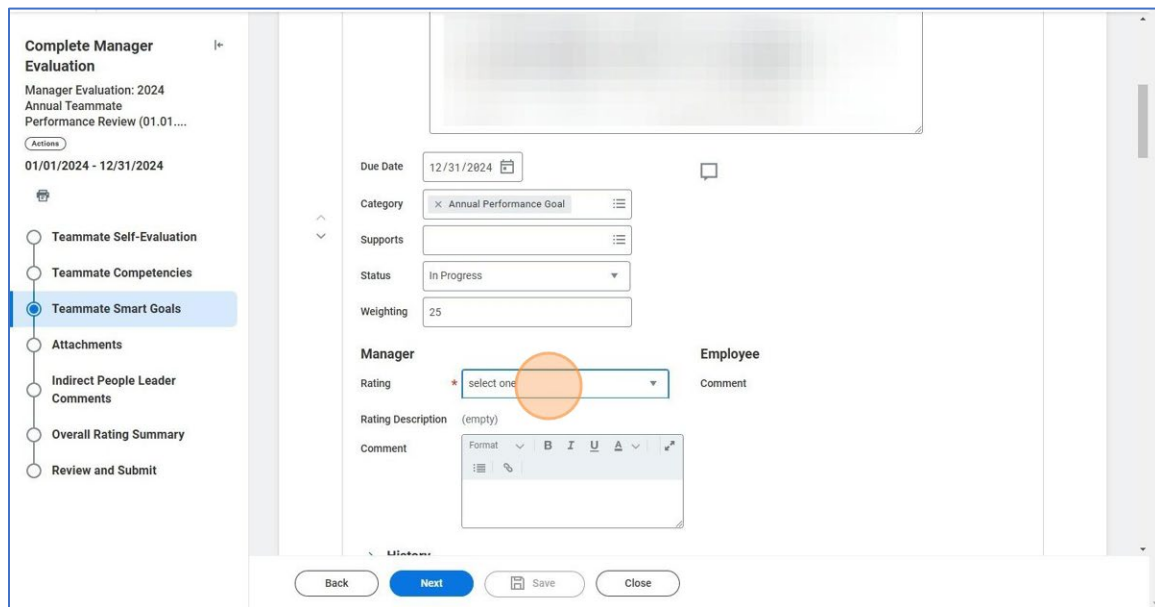
6. On the **Teammate Competencies** page, enter your ratings and comments for each competency. Remember to support your ratings with fact-based comments and examples of performance from throughout the year.



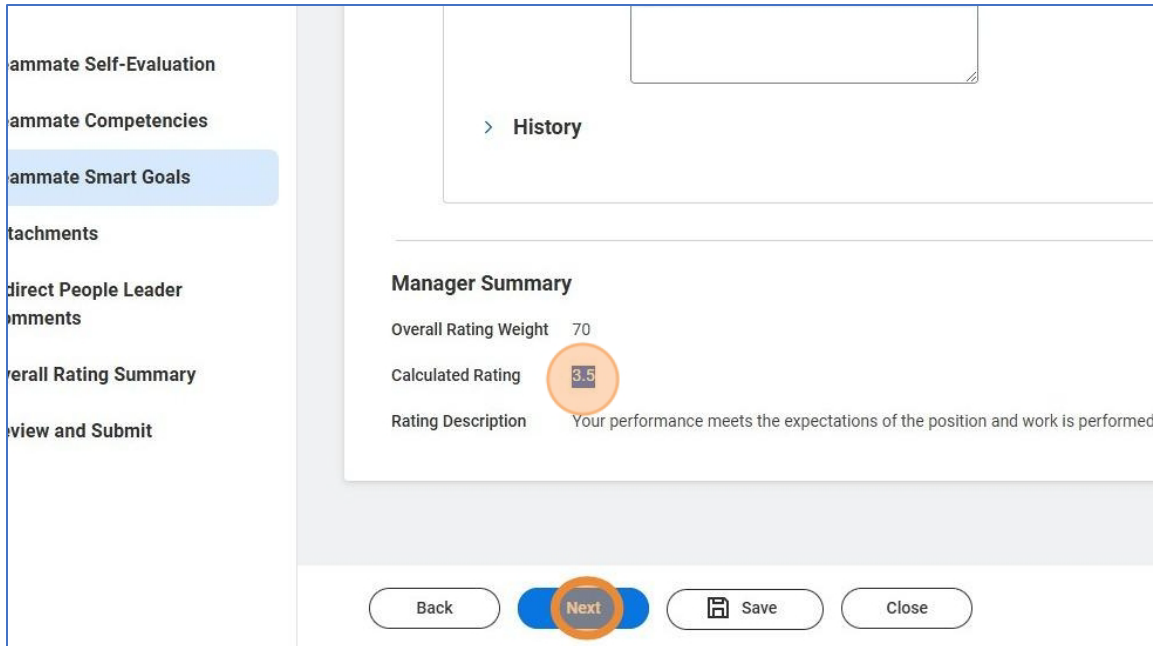
7. Once you have entered all your Competency ratings and comments, the bottom of the screen will show the rating for the Competencies, which is 30% of the teammate's overall score. Click **Next**



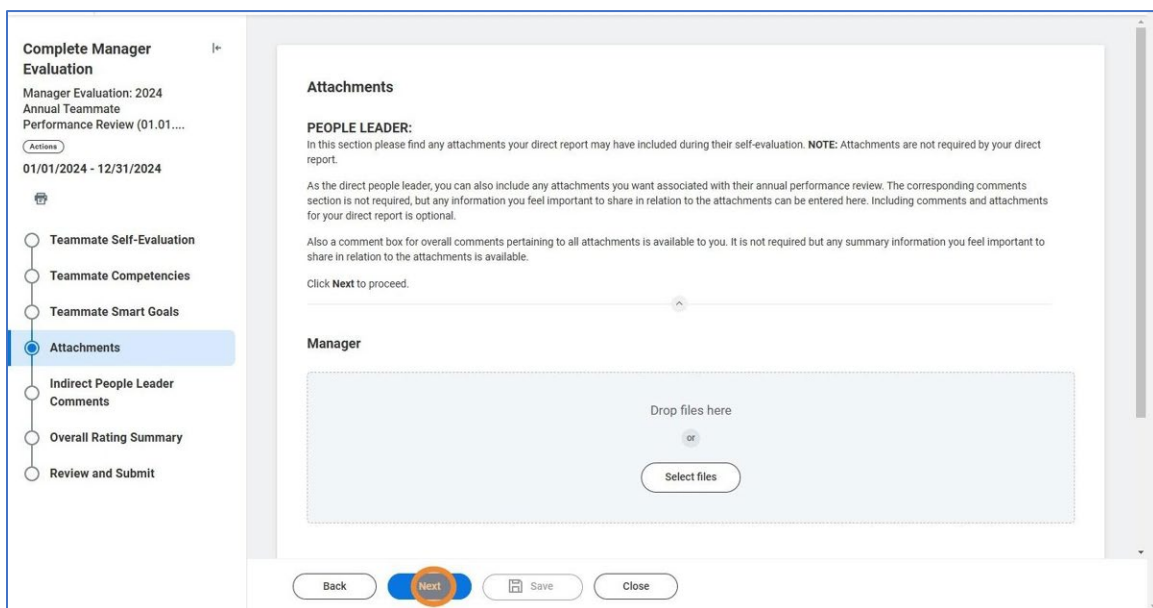
- On the **Teammate Smart Goals** page, enter your ratings and comments on each SMART goal. Remember to enter fact-based comments and provide examples of performance from throughout the year.



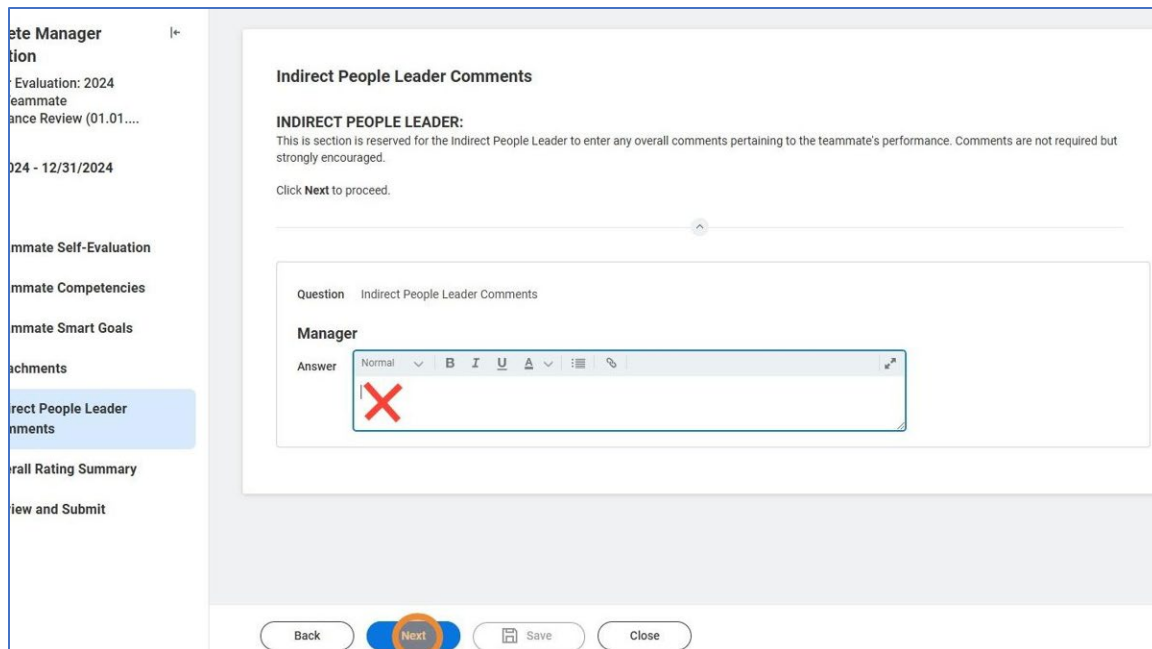
- At the bottom of the page, you will see a calculated rating based on your SMART goal ratings (**Note:** this is the SMART goals only, not the overall rating). When you are finished evaluating the teammate's SMART goals, click **Next**



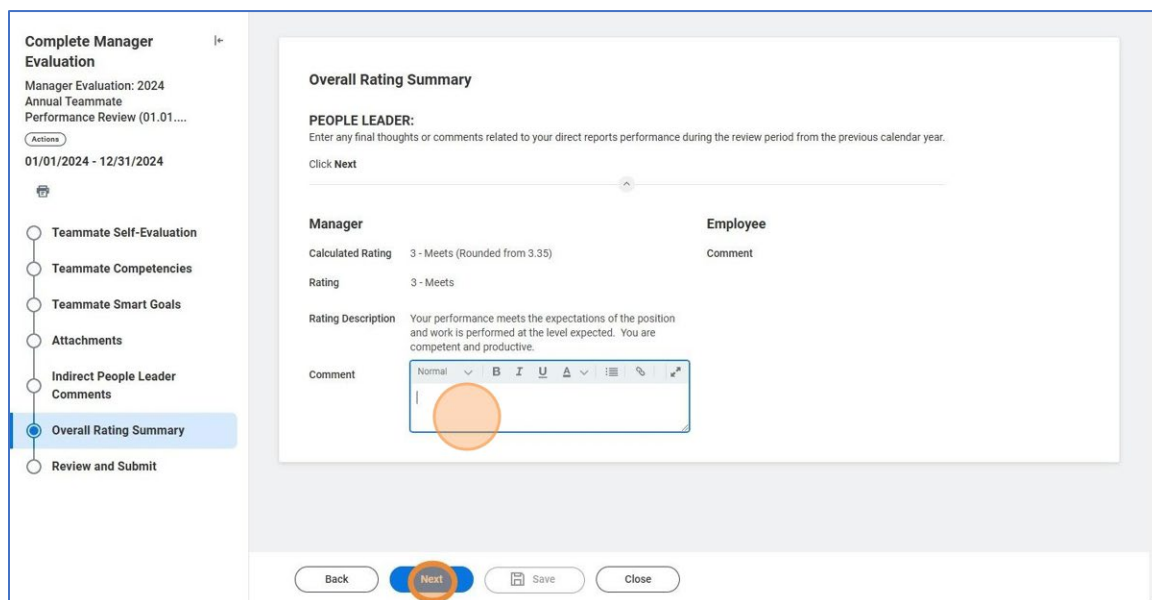
10. On the **Attachments** page, upload any documentation regarding the teammate's performance throughout the year. This is not required. Click **Next**



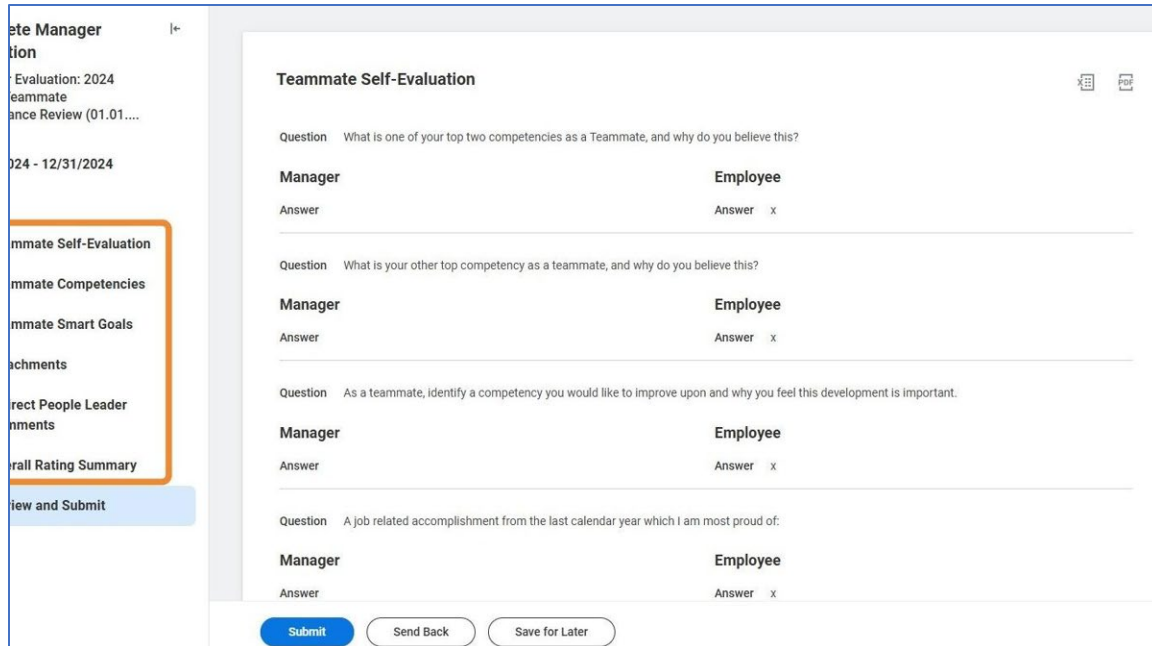
11. Do NOT enter any comments on the **Indirect People Leader Comments** page. This is a space for your manager to add their comments. Click **Next**



12. On the **Overall Ratings Summary** page, you can see the teammate's overall score (in this example it is 3.35). You may also add your overall comments regarding the teammate's performance throughout the year, as supported by their overall score and your comments throughout the evaluation. When finished, click **Next**

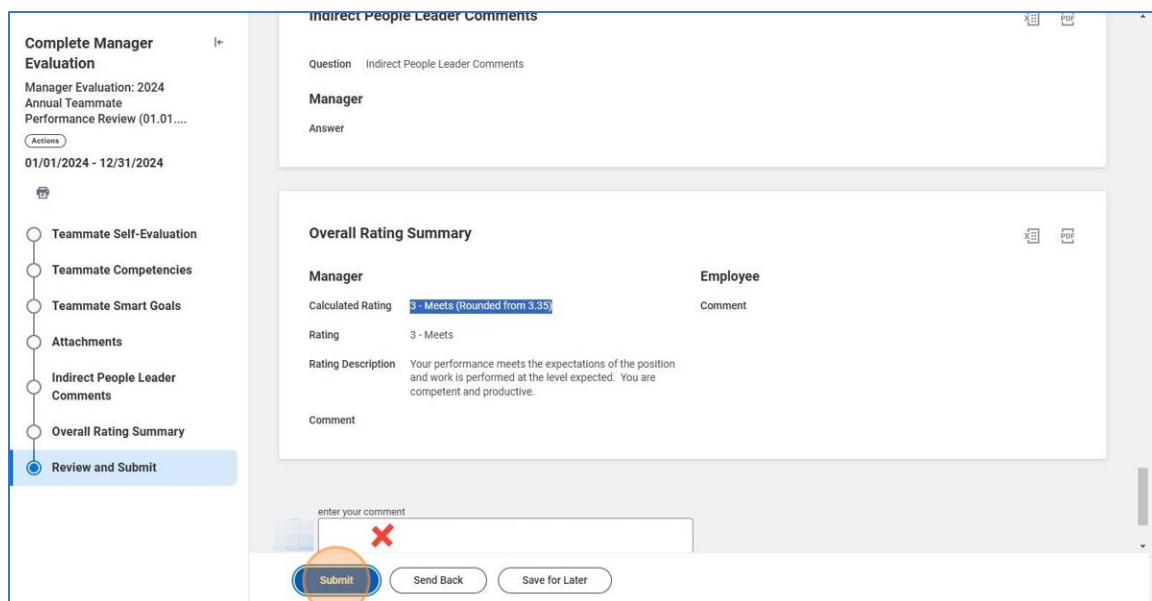


13. On the **Review and Submit** page, look over all your ratings and comments. To make edits, select that step from the list on the left-side of the page, make your changes, and return to the Review and Submit page.



14. If everything is accurate, you may click **Submit** to send the review to your manager (the teammate's indirect manager) to review your ratings.

***Note:** do NOT use the comment box at the bottom of this screen. Those comments will appear in the Workday process log, but they will NOT appear on the teammate's review. Enter your overall comments on the teammate's performance on the Overall Ratings Summary page.



You will also notice a **Send Back** button. This allows you to send the review back to previous steps for completion if they were not completed (e.g., the employee forgot to add a comment to

one of their Competencies). When you click on Send Back, a dialogue box will open for you to complete. **Ensure you send it back to the correct step.**

Send Back

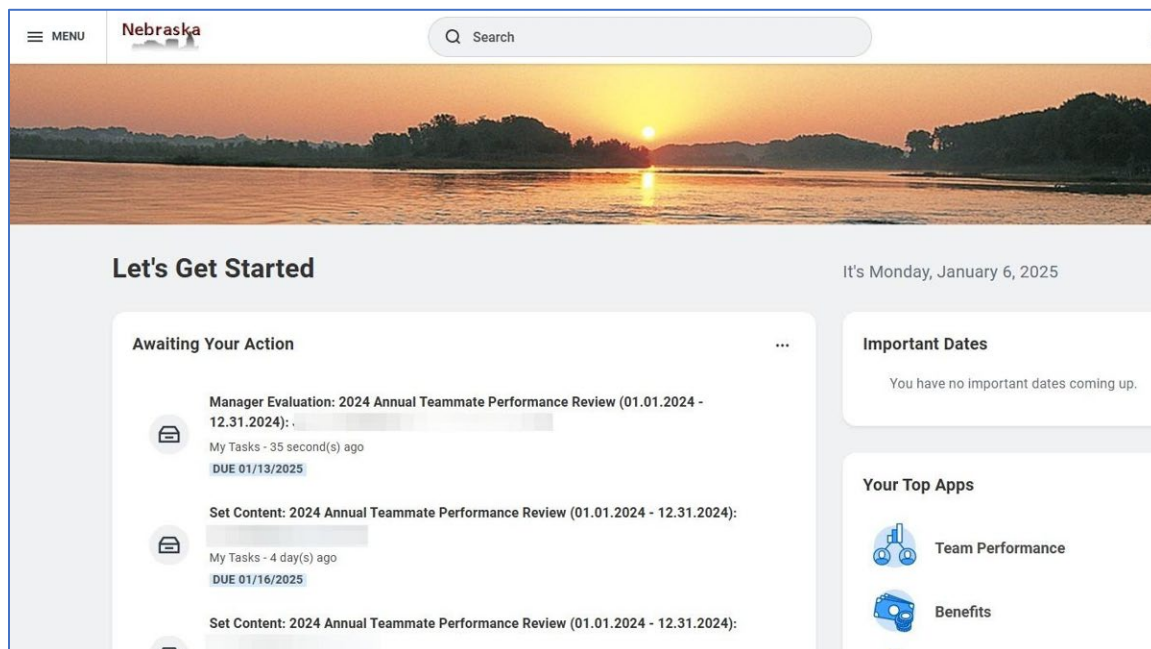
To * Search [Redacted] - Set

Reason * Review Content Complete Self Evaluation

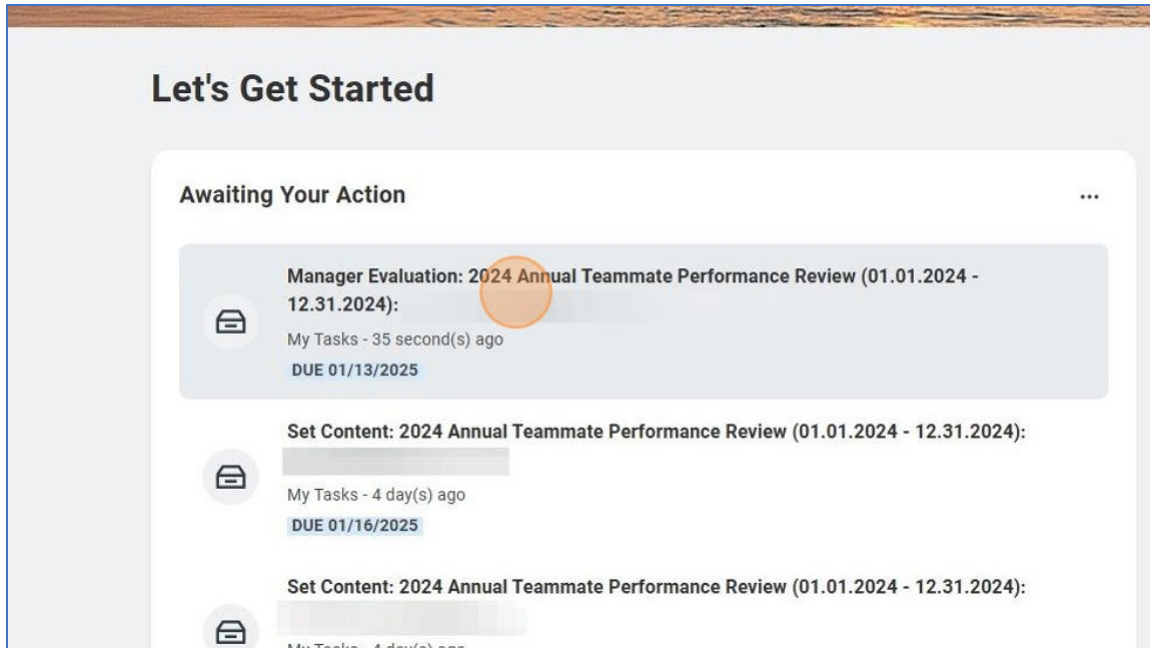
Submit Cancel

Approve the Performance Review | Indirect People Leader

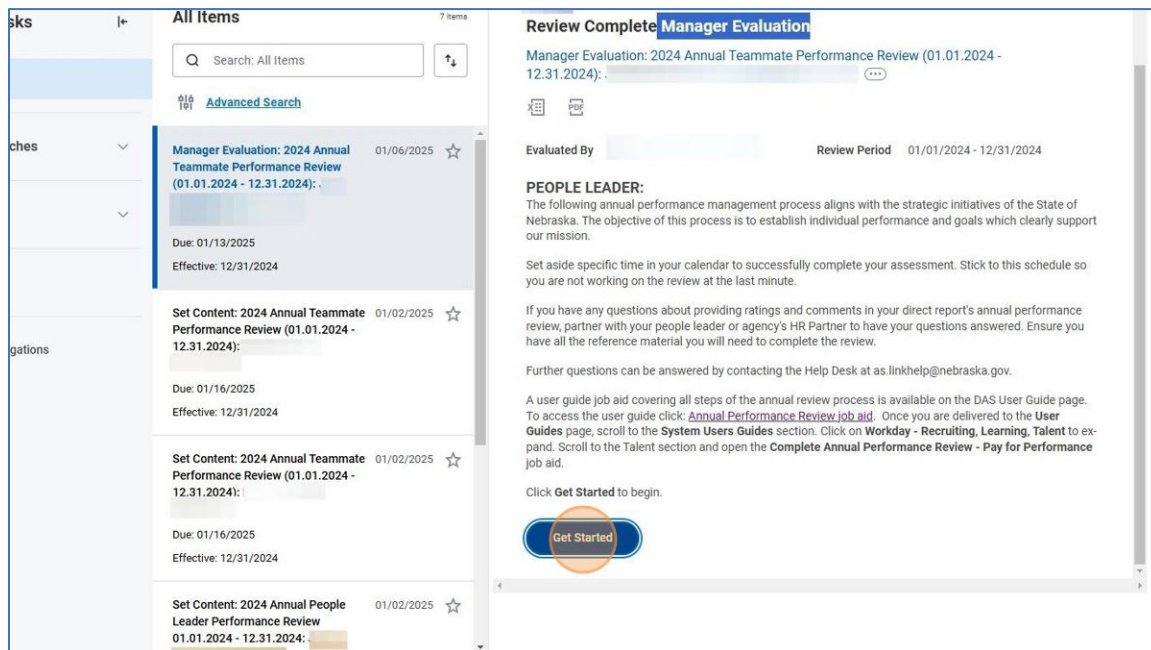
1. Go to your Workday homepage.



2. Select the **Manager Evaluation** task for your indirect report.
***Note:** Although you are reviewing and approving your direct report's evaluation, it will still be titled Manager Evaluation task in your inbox.



3. You may have to go to your Workday inbox and find the correct task. Once you do, click **Get Started**

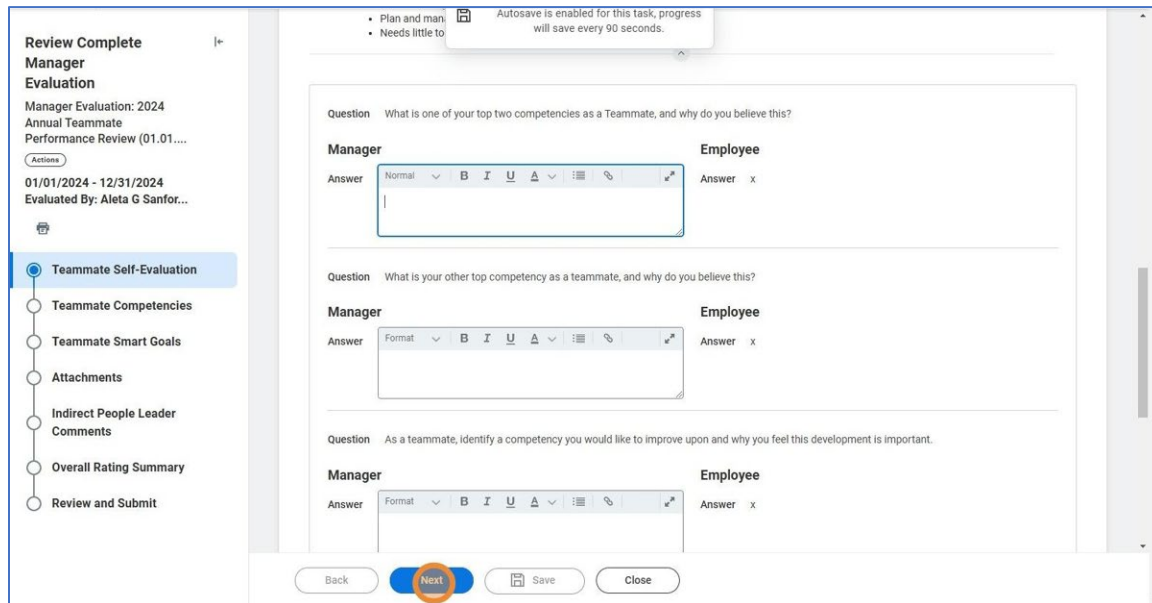


4. You will be able to see all the comments and ratings your direct report has entered, as well as all the comments the teammate has entered.

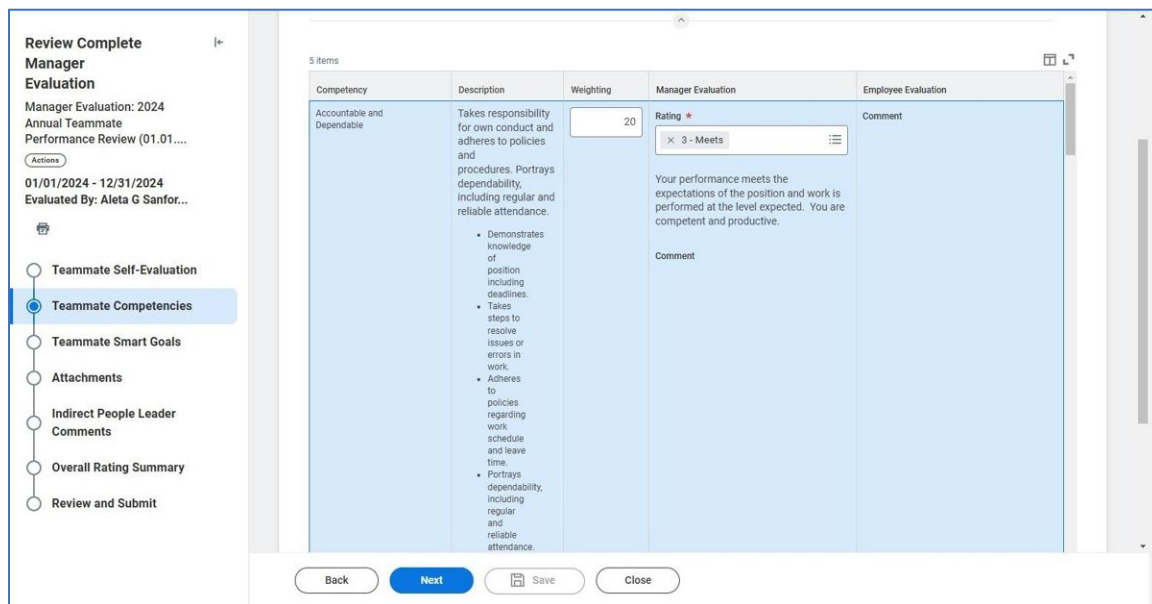
***Note:** Please do NOT edit your direct report's comments. If you have comments on the

teammate's performance, you may enter those on the Indirect People Leader Comments page. If your direct report needs to make edits to their comments or ratings, you can send back the evaluation to the Manager Evaluation step (see guide below).

Once you have reviewed the comments on this page, click **Next**



5. Review the ratings and comments on the **Teammate Competencies** page.



- Review the calculated Competencies rating, which is worth 30% of the teammate's overall score. Click **Next**

Self-Evaluation

Competencies

Smart Goals

s

ple Leader

ng Summary

Submit

Adaptability	Portrays dependability, including regular and reliable attendance.		
--------------	--	--	--

Manager Summary

Overall Rating Weight 30

Calculated Rating 3

Rating Description Your performance meets the expectations of the position and work is per...

Back Next Save Close

- On the Teammate Smart Goals page, review your direct report's ratings and comments.
***Note:** Again, please don't edit anything on these pages. If the ratings or comments need to be updated, you can send the review back to your direct report for adjustment. If you have comments to add, you may add them on the Indirect People Leader Comments page later in the process.

Review Complete

Manager Evaluation

Manager Evaluation: 2024
Annual Teammate Performance Review (01.01....
Actions

01/01/2024 - 12/31/2024
Evaluated By: Aleta G Sanfor...

Teammate Self-Evaluation

Teammate Competencies

Teammate Smart Goals

Attachments

Indirect People Leader Comments

Overall Rating Summary

Review and Submit

Due Date 12/31/2024

Category Annual Performance Goal

Supports

Status In Progress

Weighting 25

Manager

Rating 3 - Meets

Employee Comment

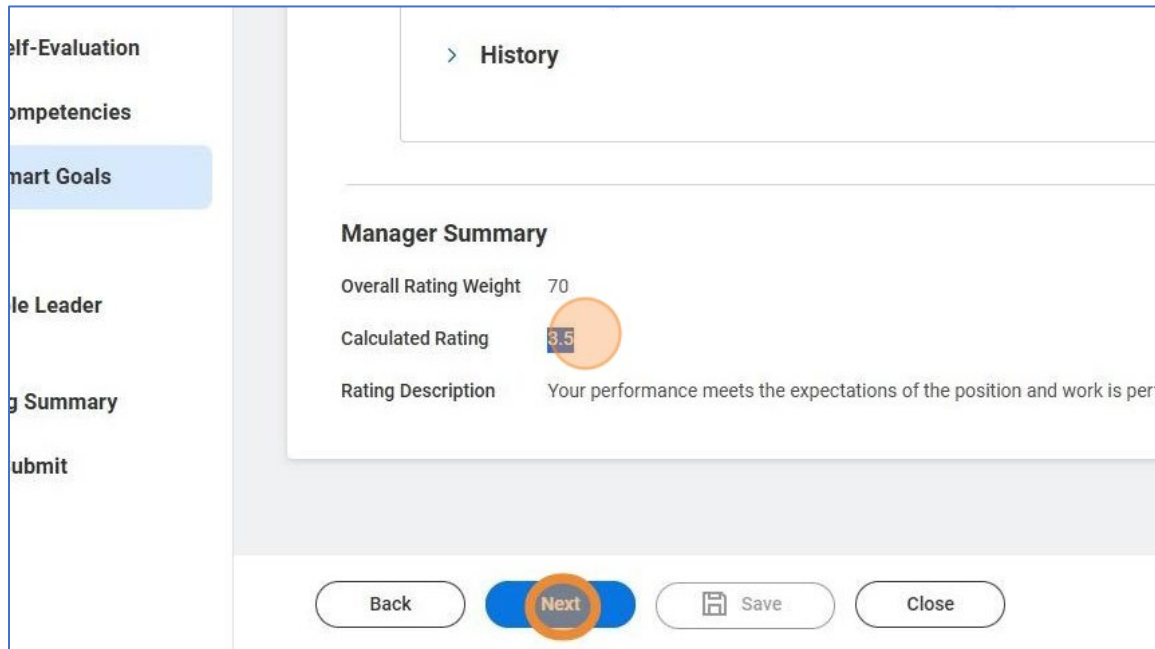
Rating Description Your performance meets the expectations of the position and work is performed at the level expected. You are competent and productive.

Comment

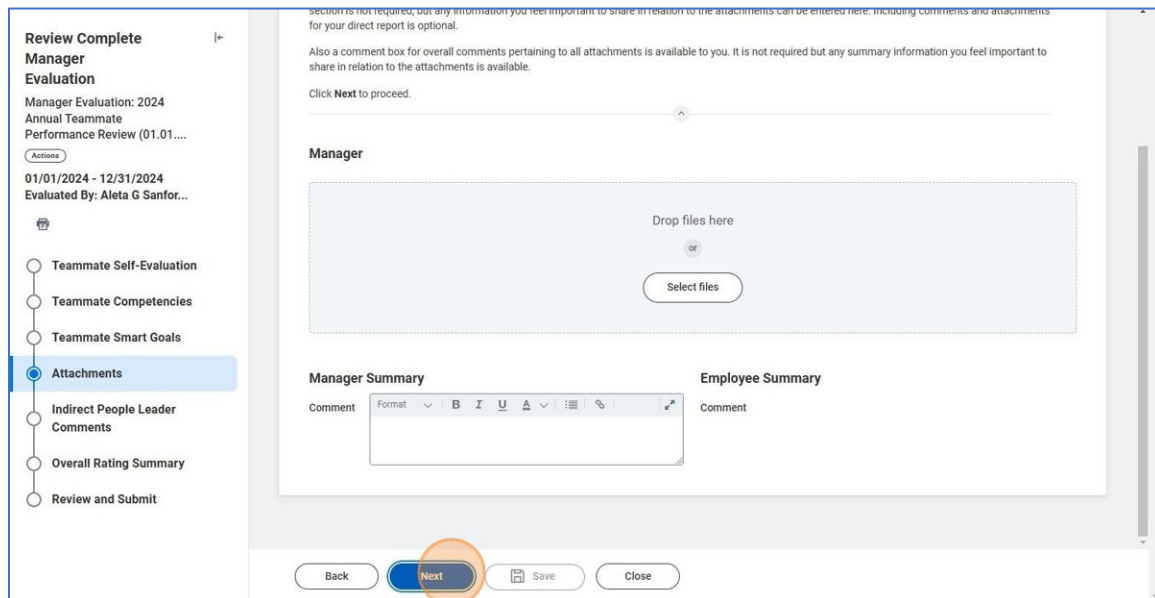
History

Back Next Save Close

- Review the calculated rating at the bottom of the page. This calculation is based *solely* on the Smart Goal ratings and is not the Overall Rating. Once you've reviewed the page, click **Next**



- Review the submitted attachments (there may be none) and any comments on the attachments. Click **Next**



10. On the **Indirect People Leader Comments** page, you may enter any comments you have regarding the teammate's performance throughout the year.

Performance Review (01.01....
Actions
01/01/2024 - 12/31/2024
Evaluated By: Aleta G Sanfor...

- Teammate Self-Evaluation
- Teammate Competencies
- Teammate Smart Goals
- Attachments
- Indirect People Leader Comments**
- Overall Rating Summary
- Review and Submit

This section is reserved for the Indirect People Leader to enter any overall comments pertaining to the teammate's performance. Comments are strongly encouraged.

Click **Next** to proceed.

Question Indirect People Leader Comments

Manager

Answer

Normal B I U A [List] [Link]

Back Next Save Close

11. After adding your comments, click **Next**

Teammate Self-Evaluation

Teammate Competencies

Teammate Smart Goals

Indirect People Leader Comments

Overall Rating Summary

Review and Submit

Question Indirect People Leader Comments

Manager

Answer

Normal B I U A [List] [Link]

Back Next Save Close

12. Review the Overall Rating (in this example it is 3.35) and your direct report's overall comments on the teammate's performance. Then click **Next**

Review Complete
Manager Evaluation
 Manager Evaluation: 2024
 Annual Teammate Performance Review (01.01....
 Actions
 01/01/2024 - 12/31/2024
 Evaluated By: Aleta G Sanfor...

Teammate Self-Evaluation
 Teammate Competencies
 Teammate Smart Goals
 Attachments
 Indirect People Leader Comments
Overall Rating Summary
 Review and Submit

Overall Rating Summary

PEOPLE LEADER:
 Enter any final thoughts or comments related to your direct reports performance during the review period from the previous calendar year.

Click Next

Manager
 Calculated Rating 3 - Meets (Rounded from 3.35)
 Rating 3 - Meets
 Rating Description Your performance meets the expectations of the position and work is performed at the level expected. You are competent and productive.

Employee
 Comment

Comment

Back Next Save Close

13. On the **Review and Submit** page, look over all the comments and ratings one more time. If the review is ready to present to the teammate, click **Approve**

Teammate Self-Evaluation
 Teammate Competencies
 Teammate Smart Goals
 Attachments
 Indirect People Leader Comments
 Overall Rating Summary
Review and Submit

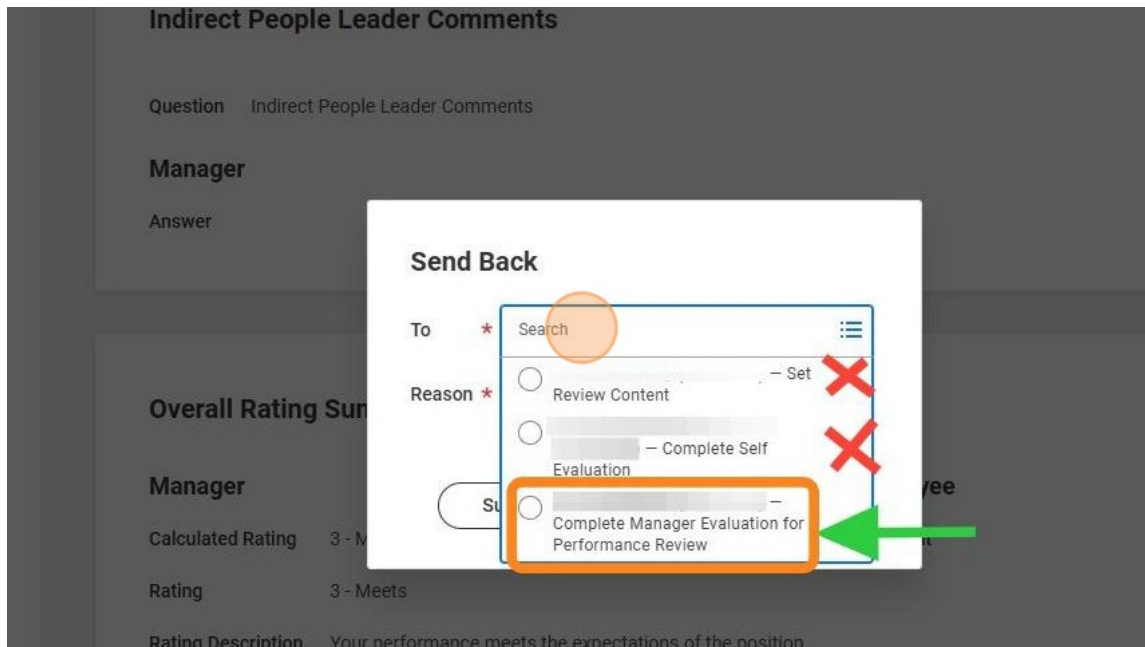
Overall Rating Summary

Manager
 Calculated Rating 3 - Meets (Rounded from 3.35)
 Rating 3 - Meets
 Rating Description Your performance meets the expectations of the position and work is performed at the level expected. You are competent and productive.

Comment

Approve Send Back Save for Later

You will also notice a **Send Back** button. This allows you to send the review back to previous steps for completion if they were not completed (e.g., you'd like your direct report to change a comment or a rating). When you click on Send Back, a dialogue box will open for you to complete. **Ensure you send it back to the correct step.**

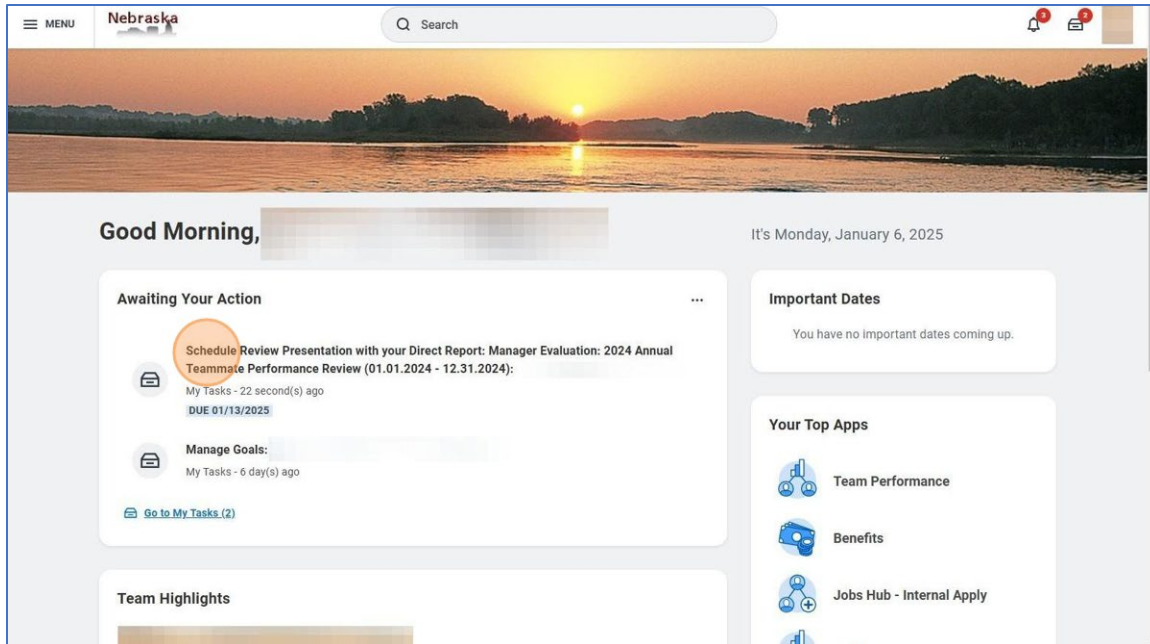


Once you have selected the **Complete Manager Evaluation for Performance Review** step, enter a brief reason why you are sending the review back. Coordinate with your direct report regarding specifics. If you send the evaluation back, you will receive this task again. Repeat the steps above and when the evaluation is ready, click **Approve**

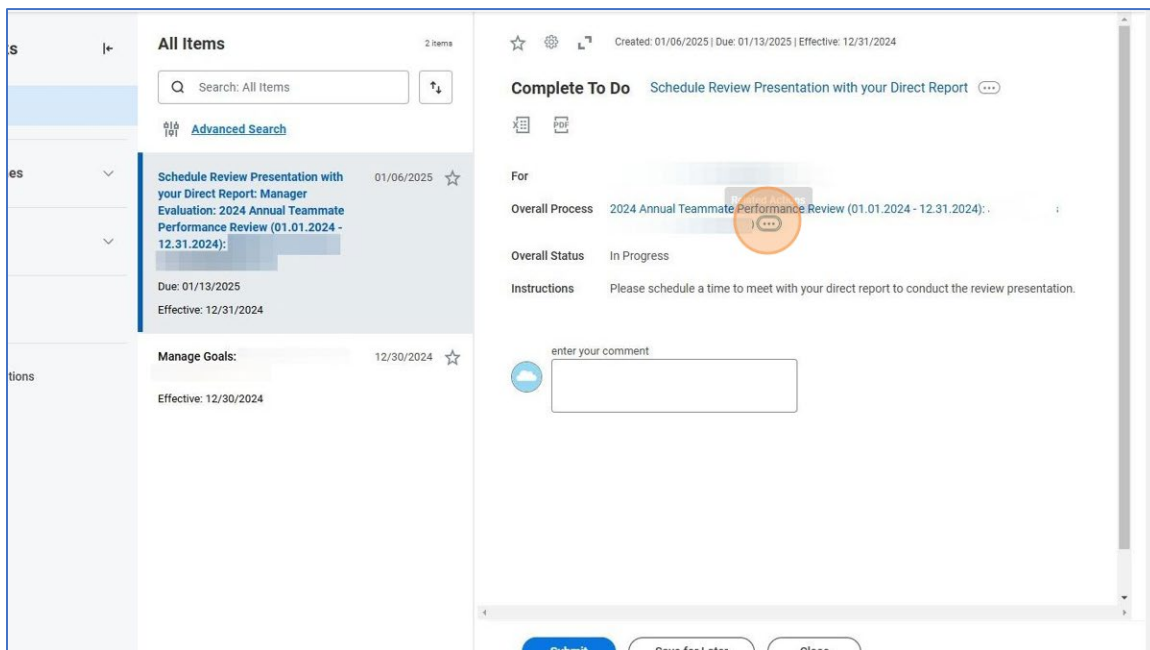
Initiate To Do Task | For People Leaders

It is now time to schedule and have the performance conversation with your teammate. Workday provides a reminder task. You must schedule the meeting as you would a normal meeting or one-on-one (using an Outlook calendar invite, for example).

1. Go to your Workday homepage and click the **Schedule Review Presentation with your Direct Report** task.

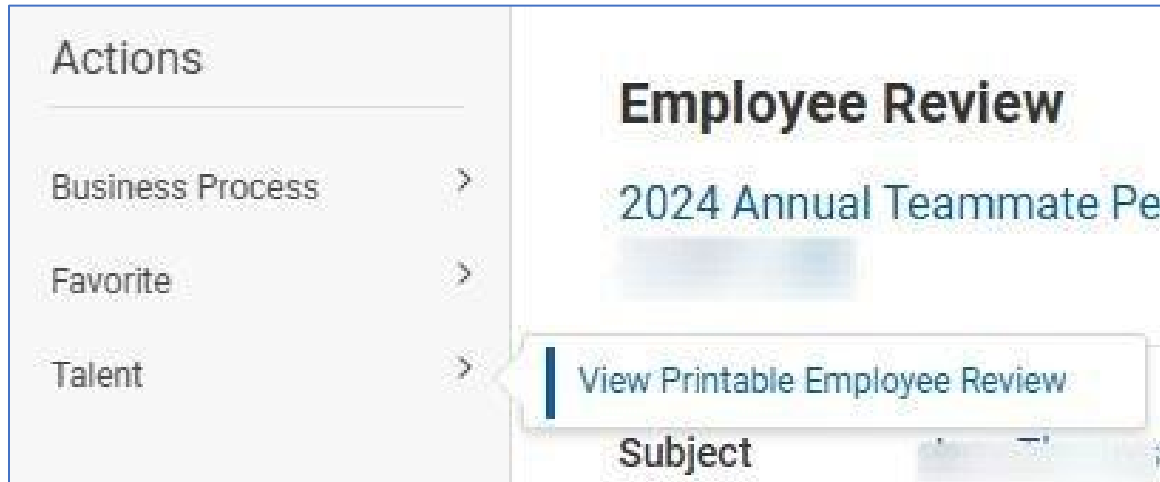


- To download or print a copy of the completed evaluation, click the **three dots** following the **Overall Process** link.

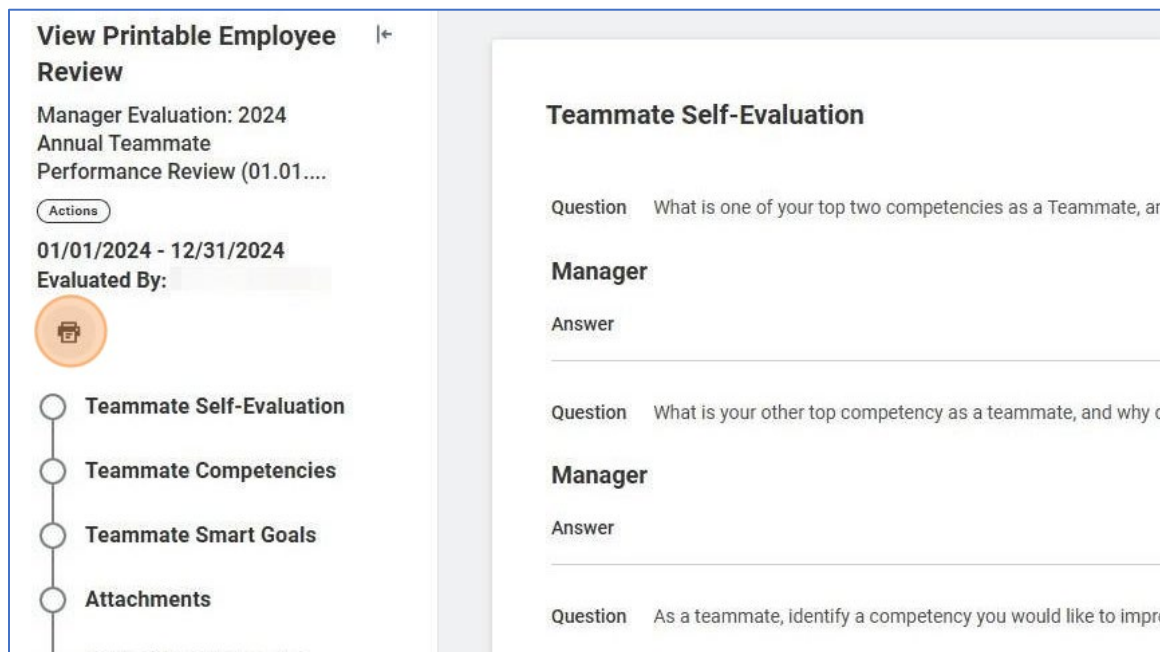


- Hover over **Talent** and **click View Printable Employee Review**. This will open the review in Workday. (It can also be found under the teammate's Workday profile. Go to their

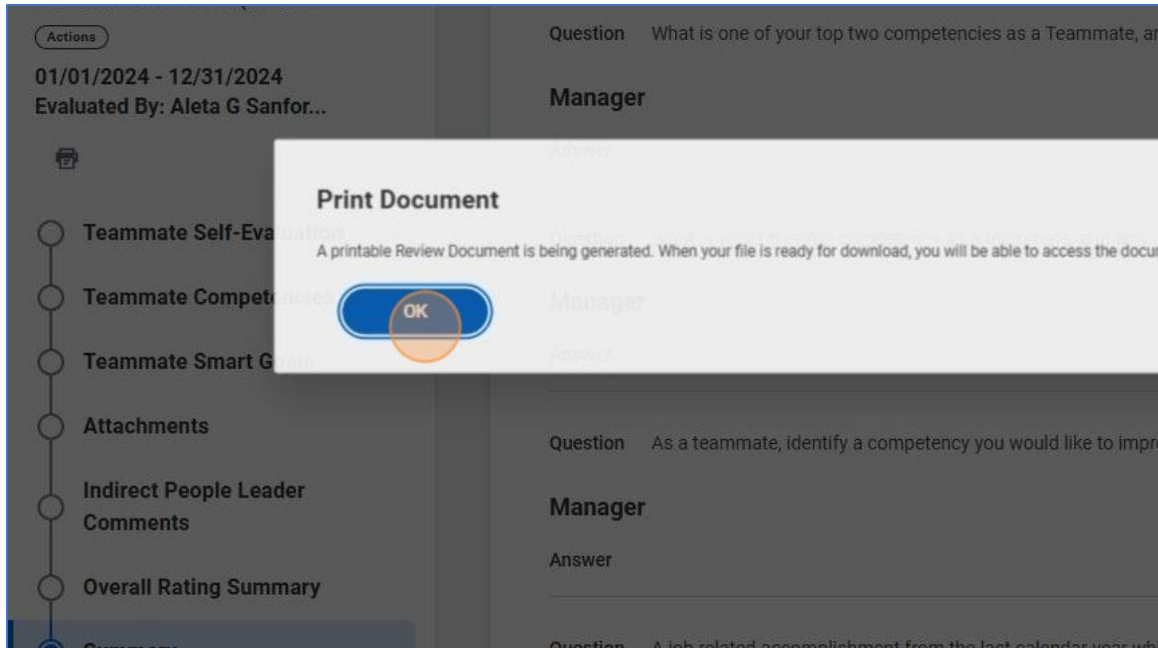
Performance page, and then the Performance Reviews tab. Click **View** if there is no PDF link already there.)



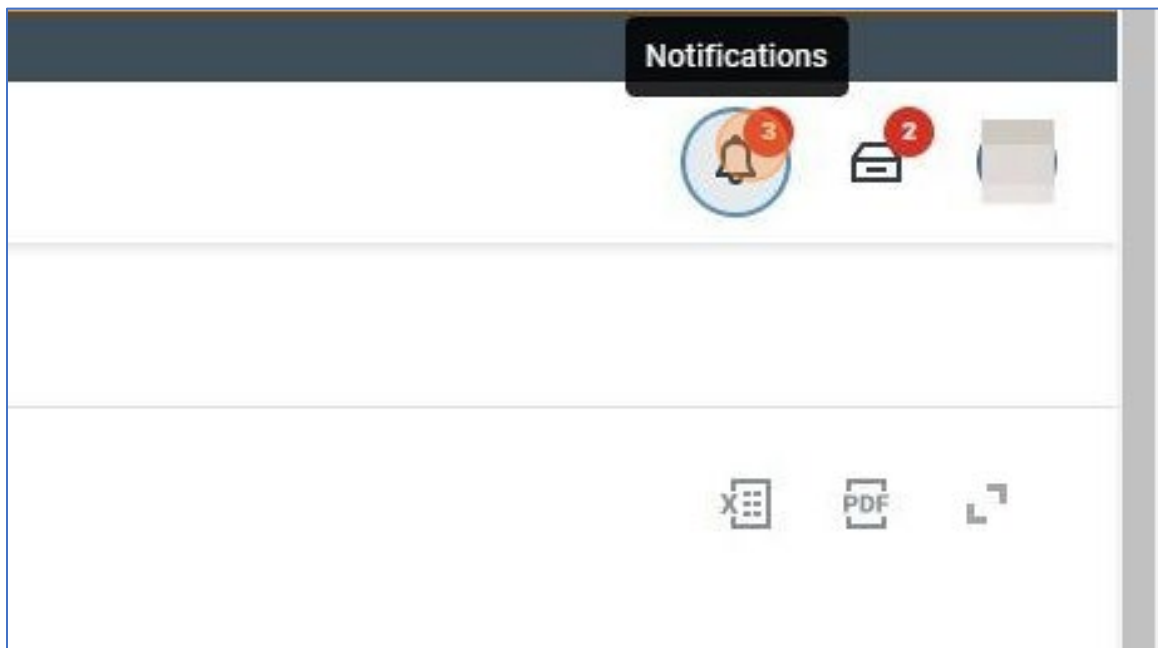
4. When looking at the review in Workday, click the **printer icon** on the left side of the screen to download a PDF version of the entire review.



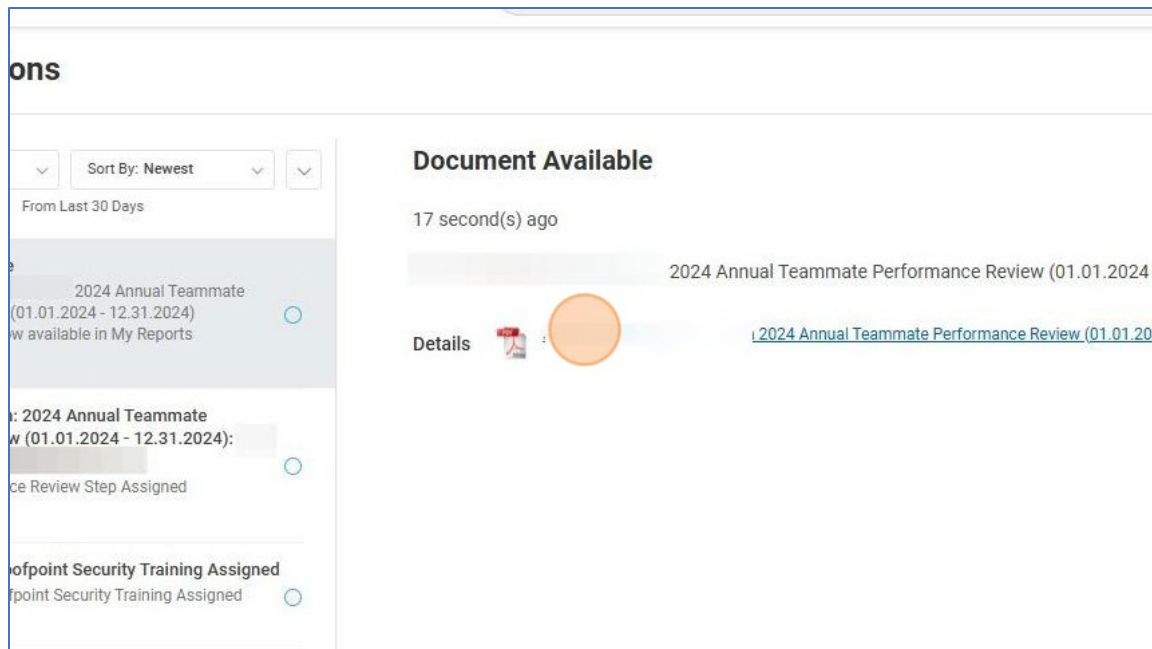
5. Click **OK**



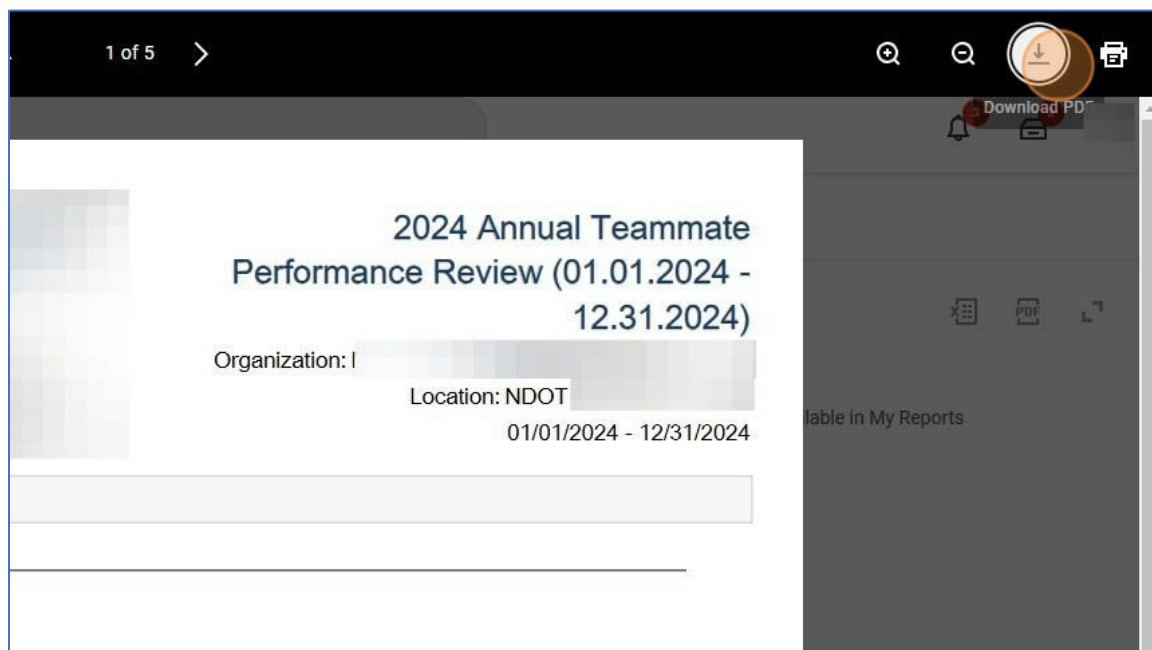
6. To find the PDF, go to your **Notifications**



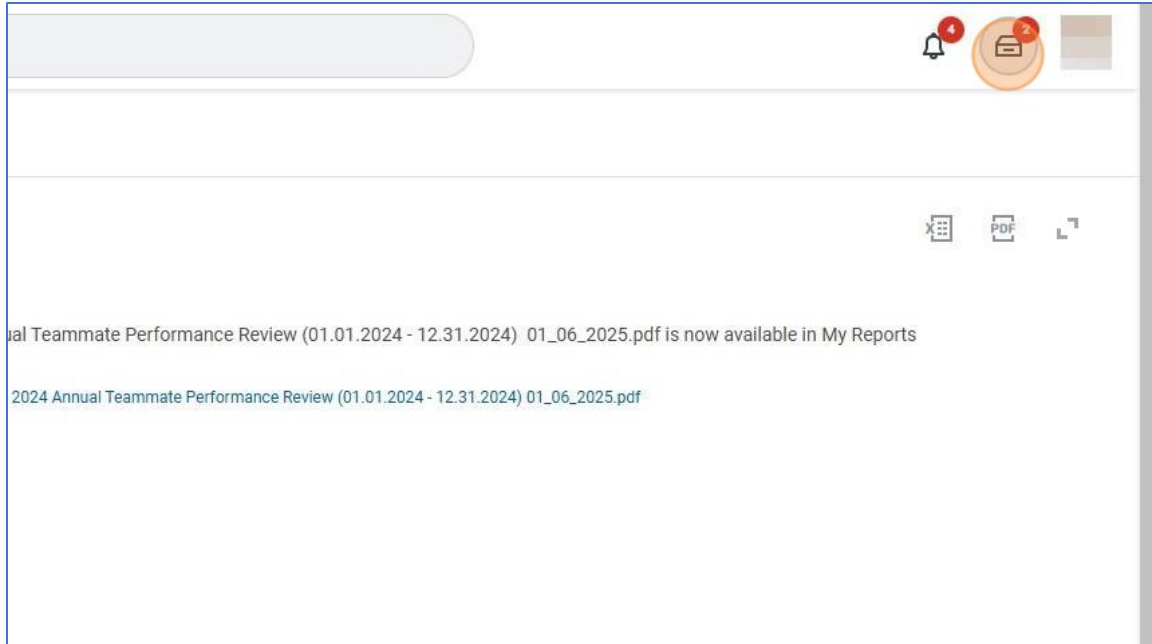
7. Click the link on the **Document Available** notification for the evaluation PDF



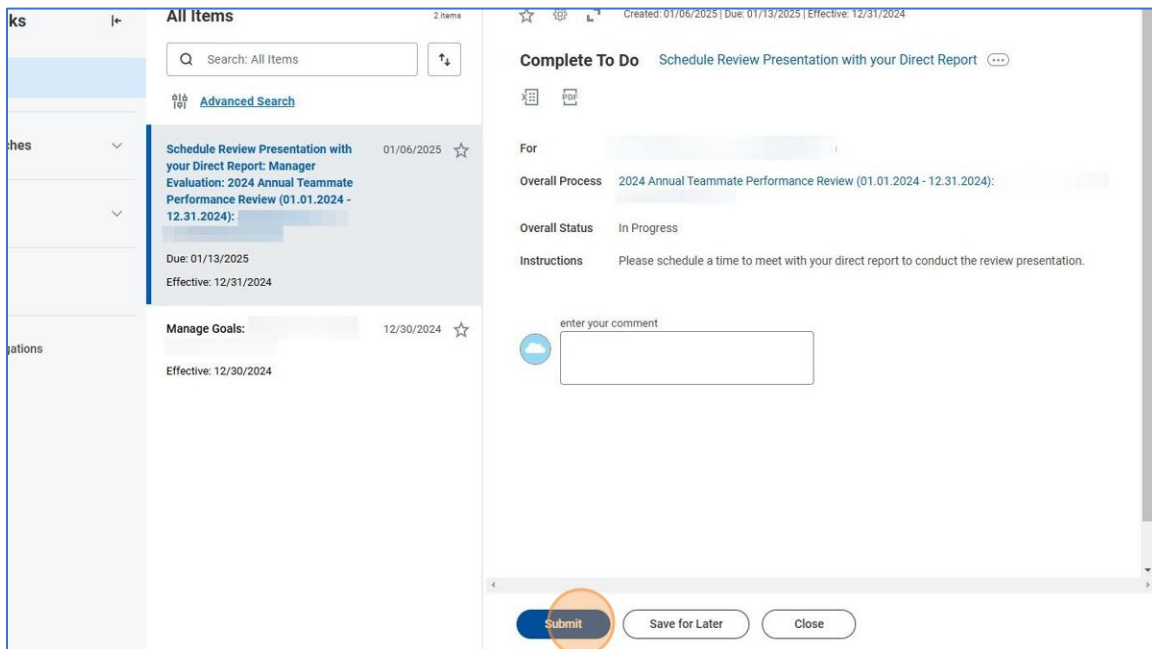
8. Download the PDF



9. Return to the **To-Do task** in your Workday Awaiting Your Action inbox

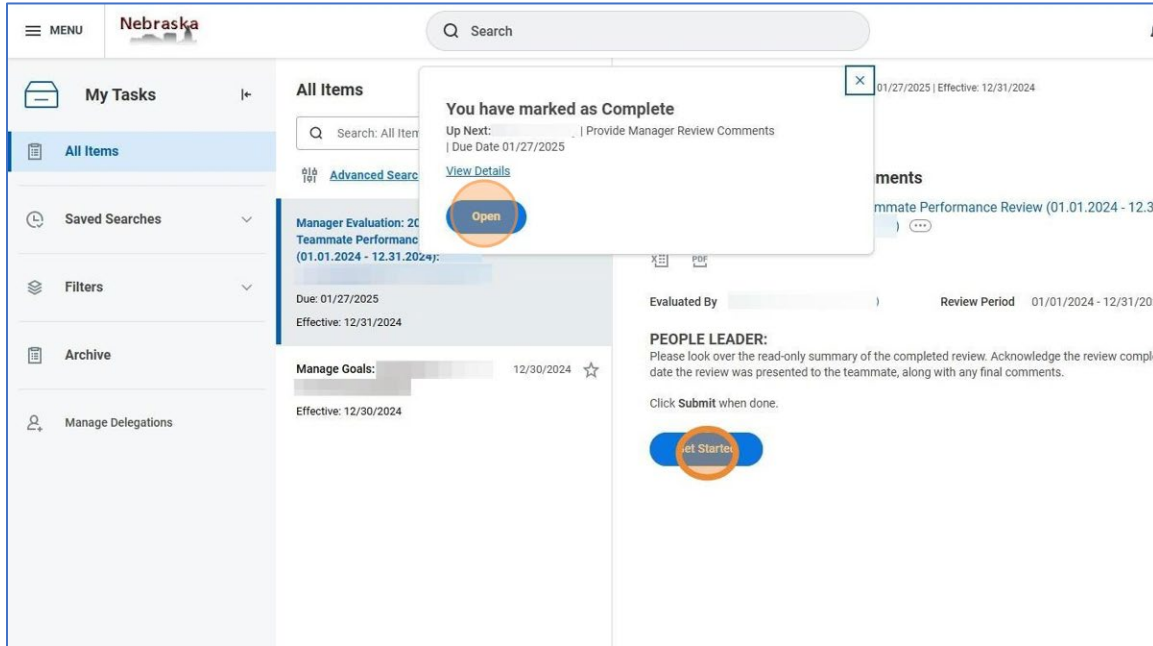


10. Enter the date you presented the evaluation to the teammate in the comment box. Click **Submit** to indicate that you have met with the teammate and the evaluation is ready for digital signatures.

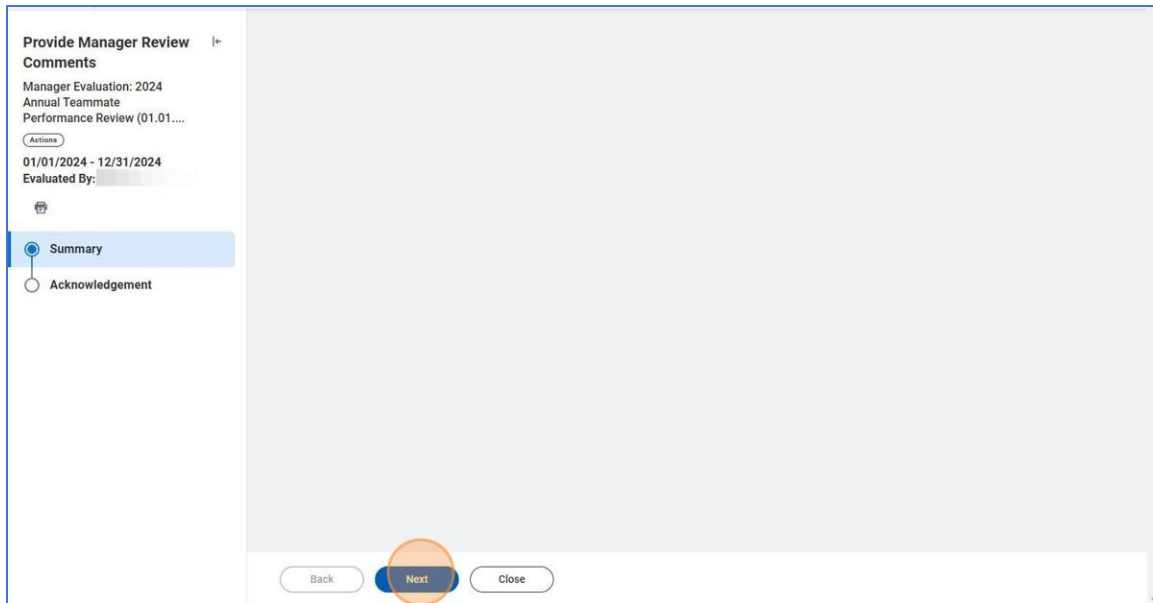


Acknowledge the Performance Review | For People Leaders

1. A new task, **Provide Manager Review Comments**, will immediately appear in your inbox. Open that task to add your digital signature to the evaluation.



2. Click **Next**



3. Click **Acknowledge Review with/without Comments**. If you have comments, add them in the first comment box, not the second box (comments entered there will not appear on the final evaluation).

Provide Manager Review | Comments

Manager Evaluation: 2024
Annual Teammate
Performance Review (01.01....)

Actions

01/01/2024 - 12/31/2024
Evaluated By: [Redacted]

Summary

Acknowledgement

Acknowledgement

Manager

Status * Search

Comment

Acknowledge Review without Comments

Acknowledge Review with Comments

enter your comment

Process History

Complete Manager Evaluation for Performance Review- Submitted Due 01/27/2025

Review Complete Manager Evaluation- Not Required

Review Complete Manager Evaluation- Not Required

4. Click **Submit**

Summary

Acknowledgement

enter your comment

Process History

Complete Manager Evaluation for Performance Review- Submitted Due 01/27/2025

Review Complete Manager Evaluation- Not Required

Review Complete Manager Evaluation- Not Required

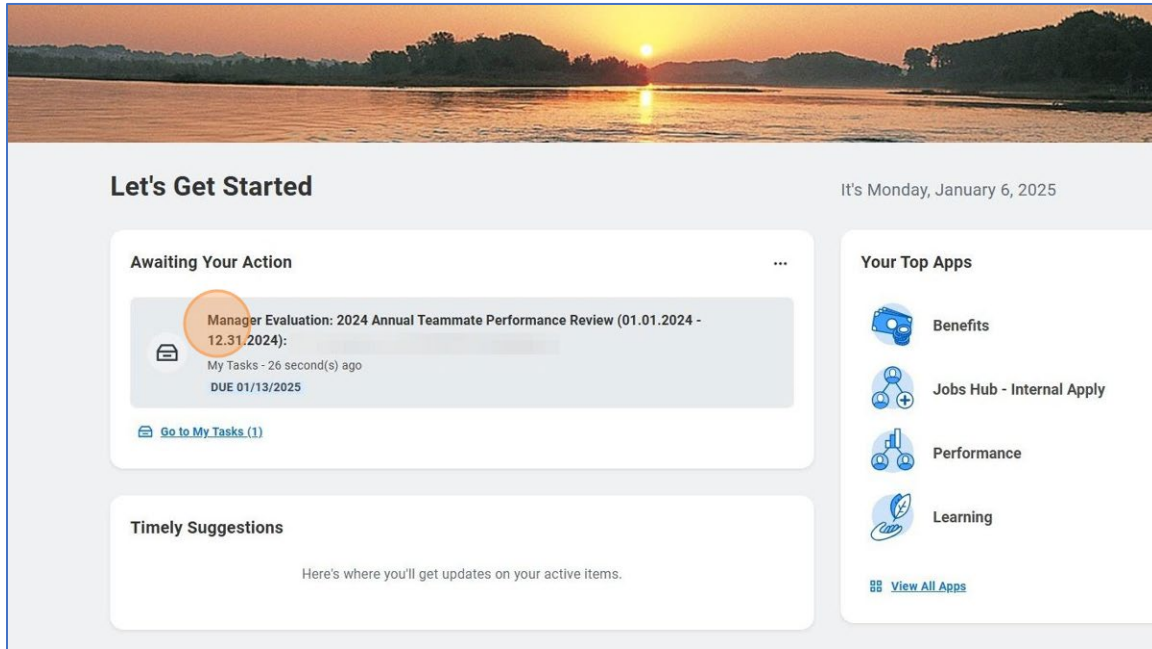
Review Complete Manager Evaluation- Approved Due 01/27/2025

Review Complete Manager Evaluation- Not Required

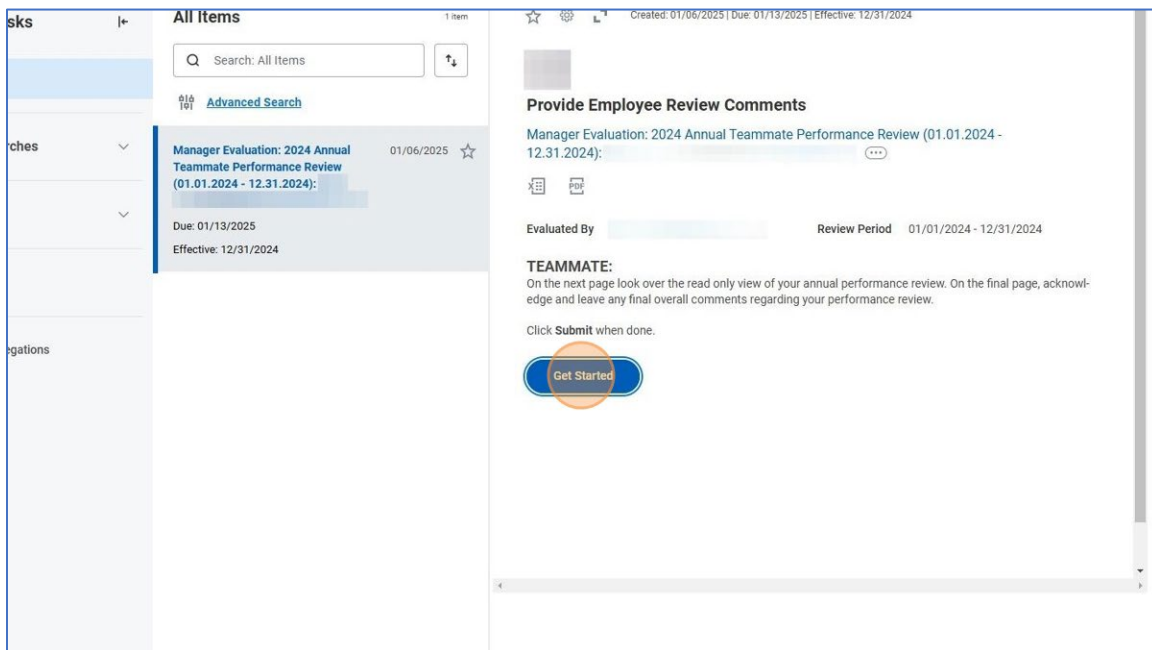
Submit Save for Later

Acknowledge the Performance Review | For Teammates

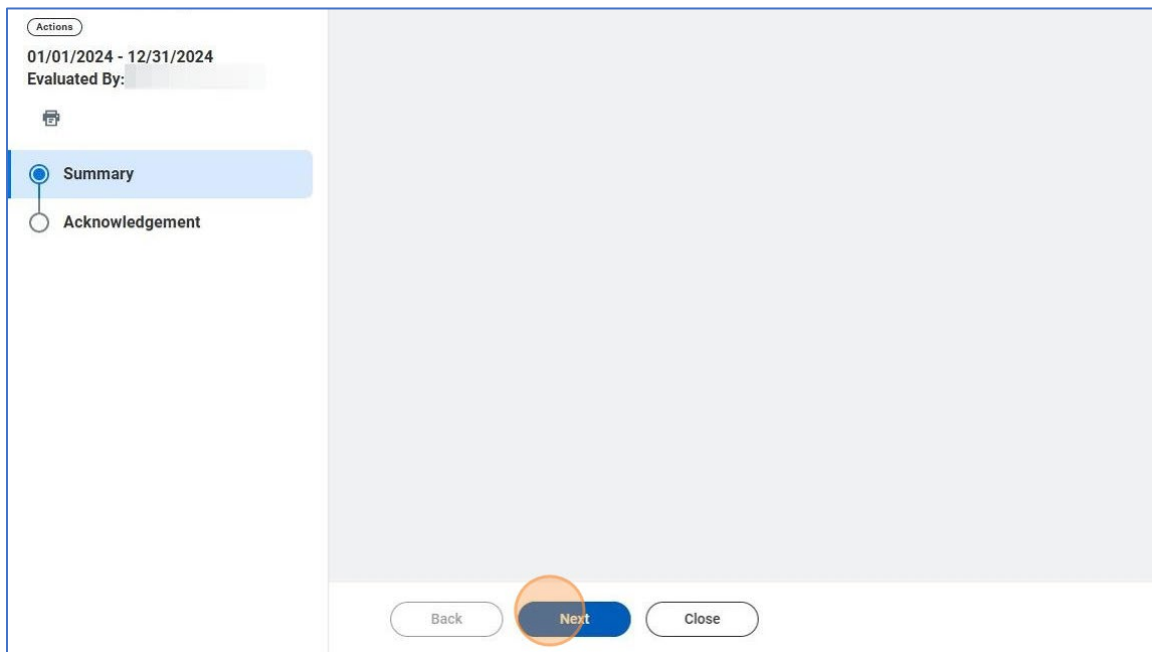
1. Go to your Workday homepage and click on the **Manager Evaluation** task. This is the task where you acknowledge your manager's evaluation of your performance and provide your digital signature.



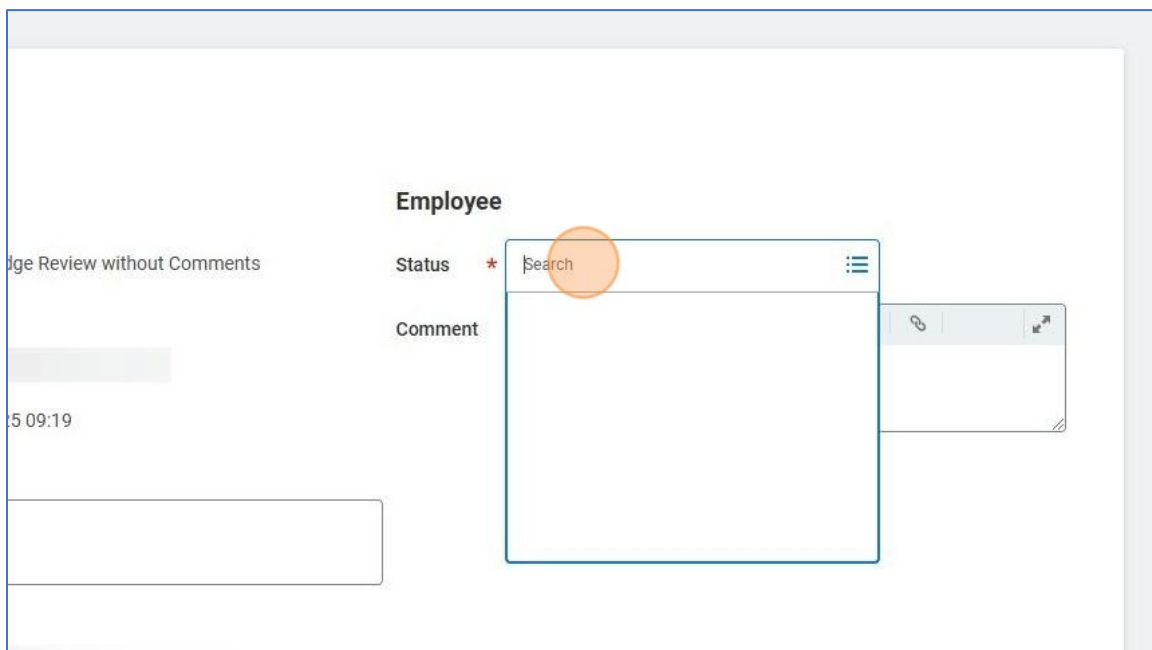
2. Click **Get Started**



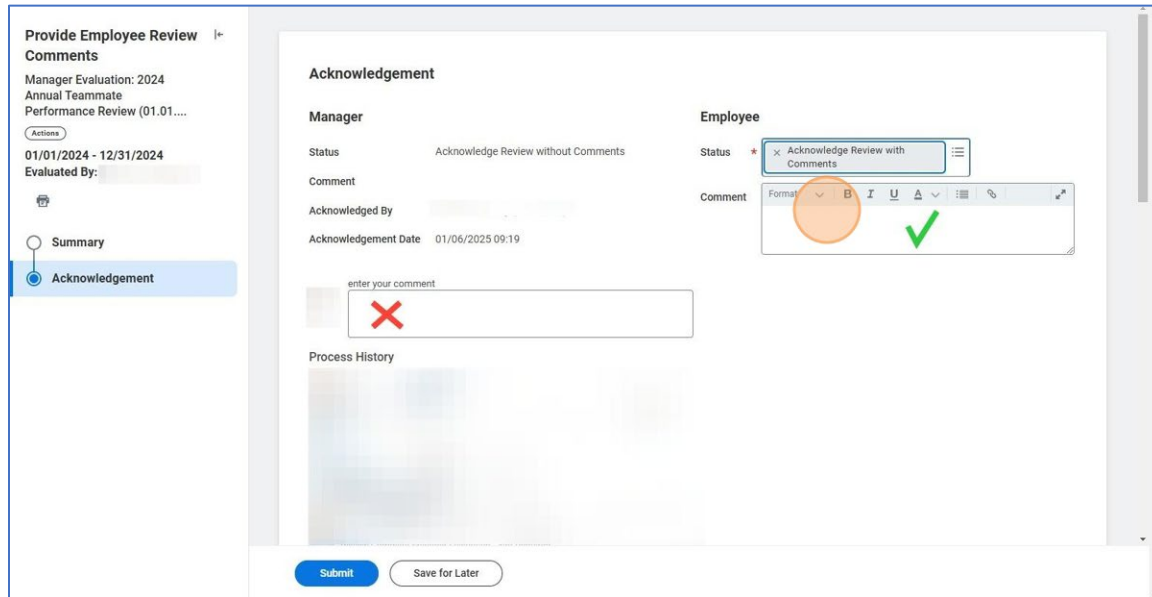
3. Click **Next**



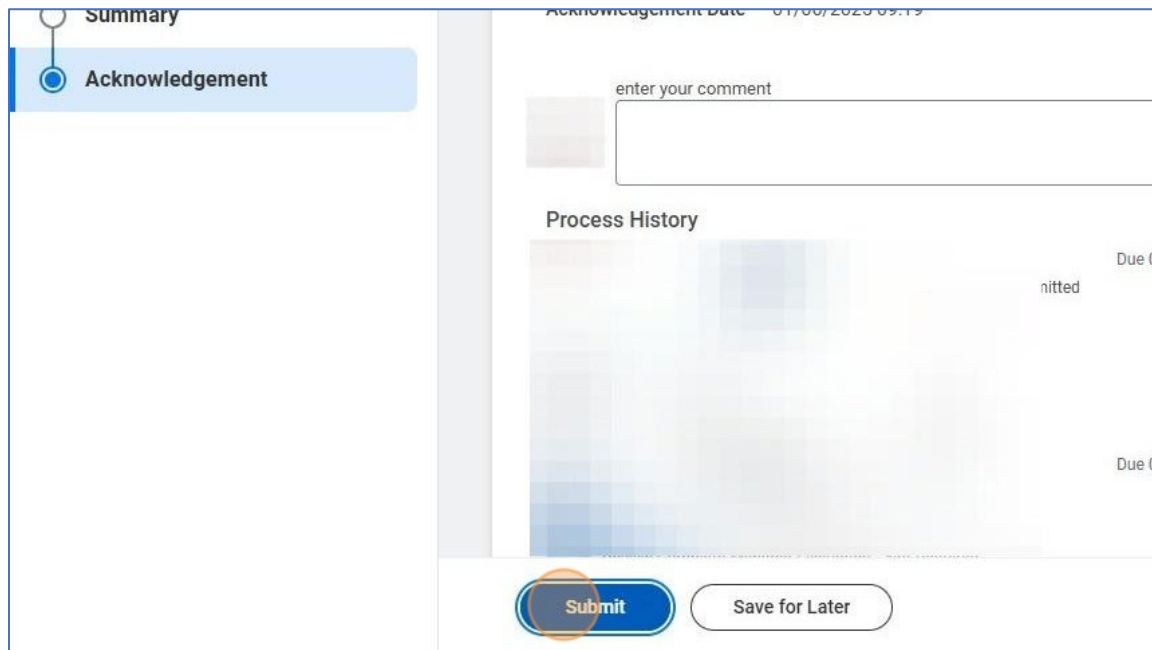
4. Click the **Status** field and acknowledge the review with or without comments



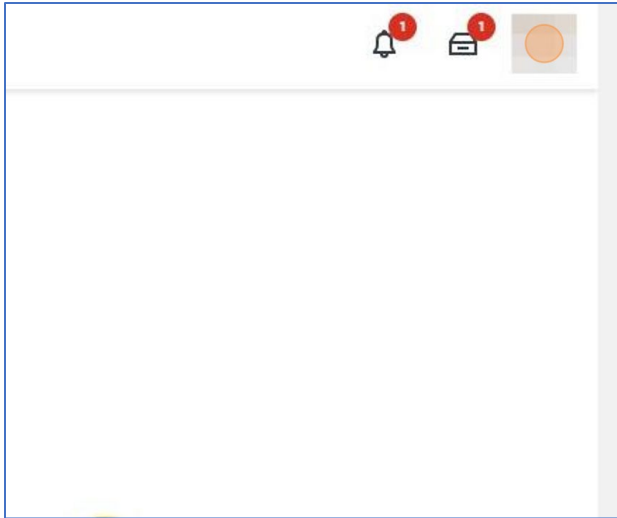
5. If you have comments, leave them in this comment box. The comment box below is for the Workday process and comments left in that box with NOT appear on the final evaluation.



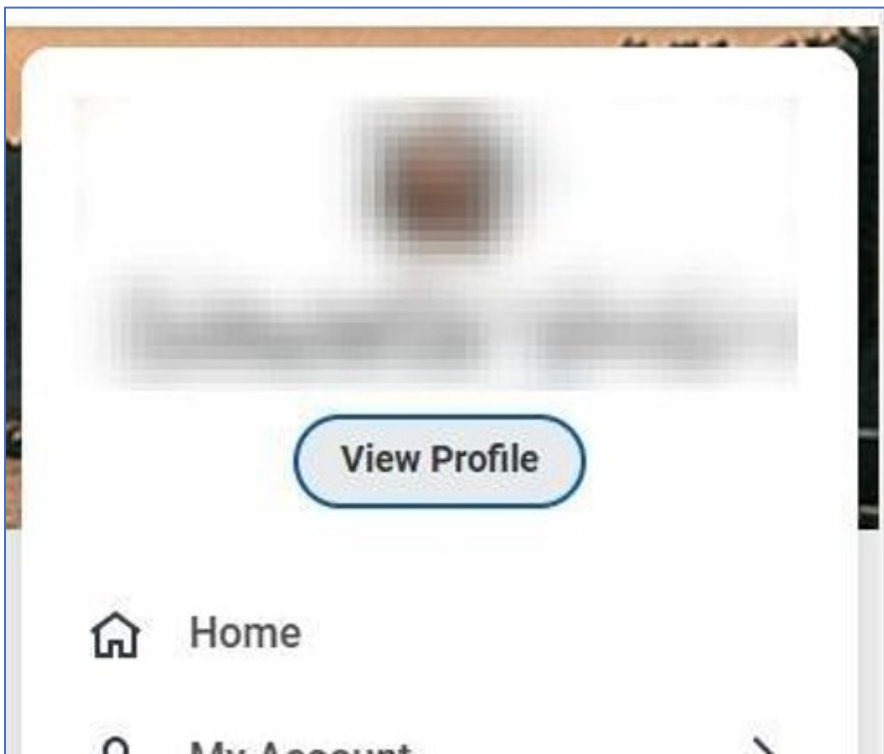
6. When you finish adding your digital acknowledgement and any comments, click **Submit**



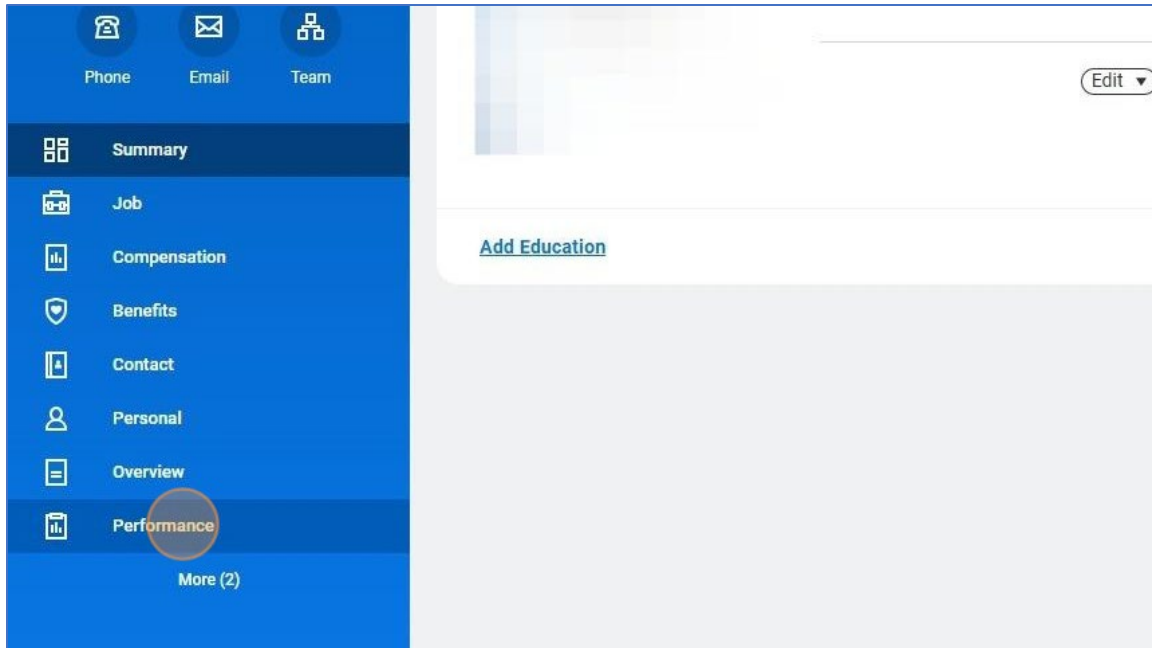
7. To **view your final performance review** (and any past performance reviews completed in Workday [2023 and after]), go to your **Workday profile** by clicking on your picture in the top right corner.



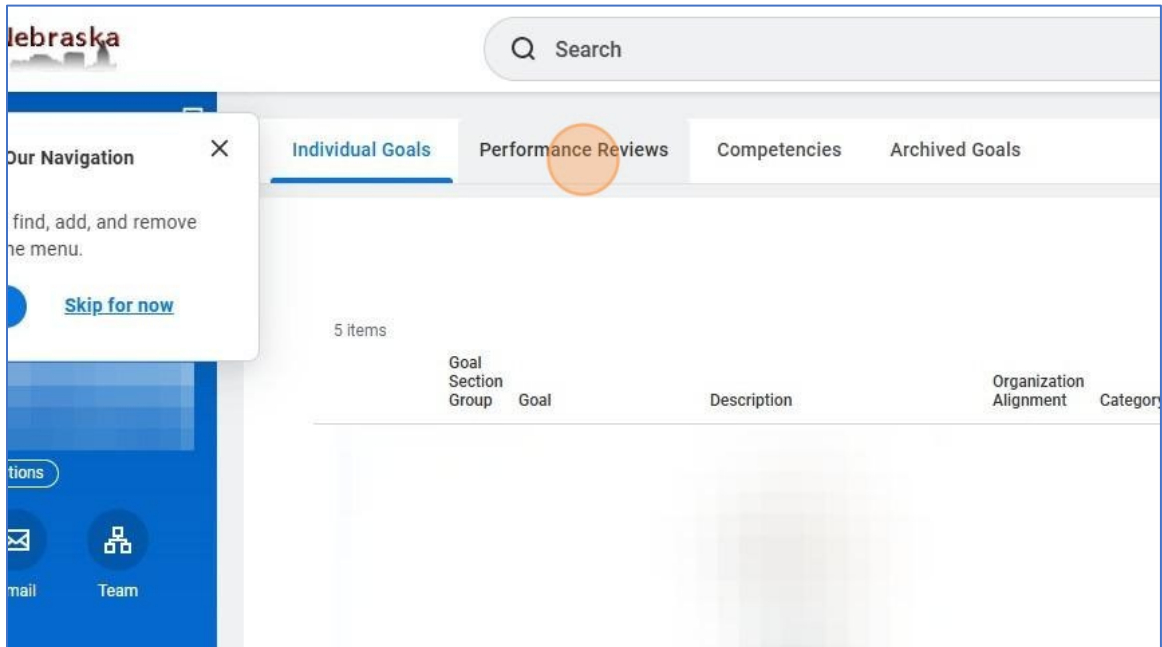
8. Click **View Profile**



9. Click **Performance**



10. Click **Performance Reviews**



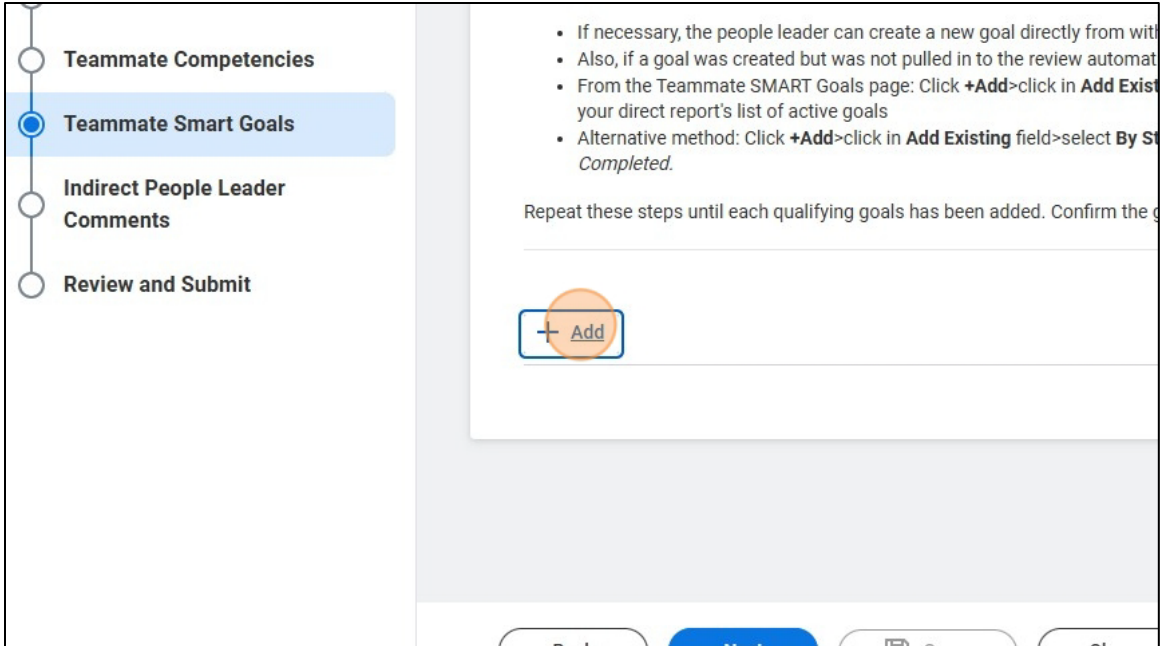
11. Click **View** to look at the review or **Create New PDF** to print a downloadable copy

Completed 1 item 🔍 ☰ 📄

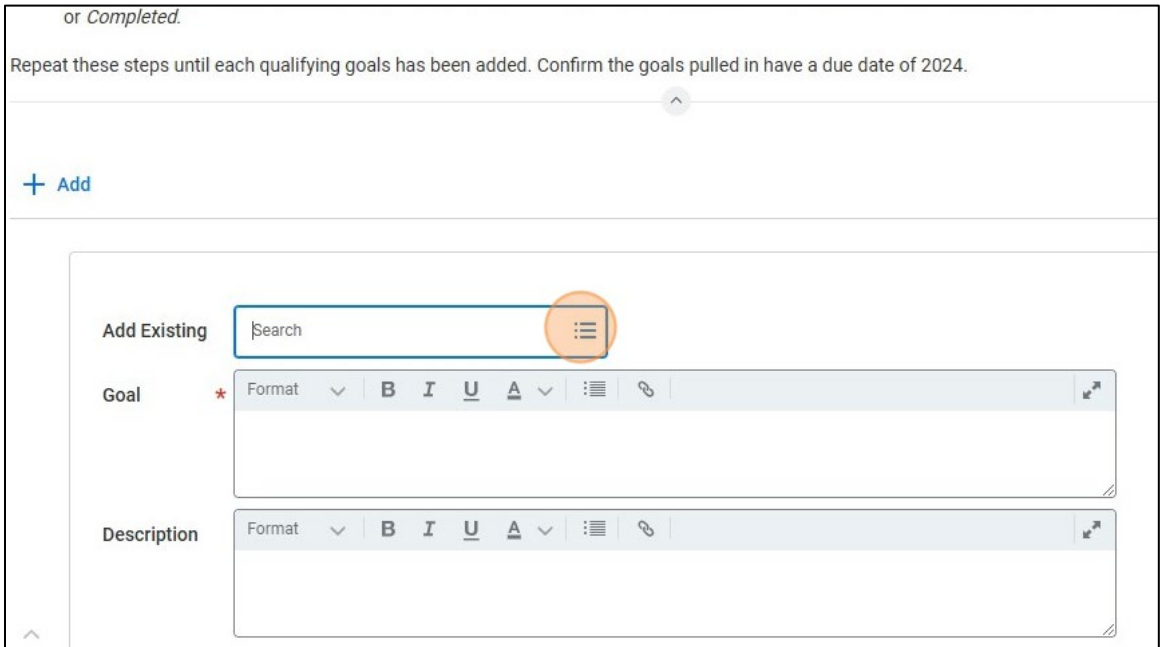
Review	Review Period Start Date	Review Period End Date	Manager Rating	View Review	Create Review PDF
2024 Annual Teammate Performance Review (01.01.2024 - 12.31.2024):	01/01/2024	12/31/2024	3 - Meets	View	Create New PDF

Add or Remove Goals from Performance Review

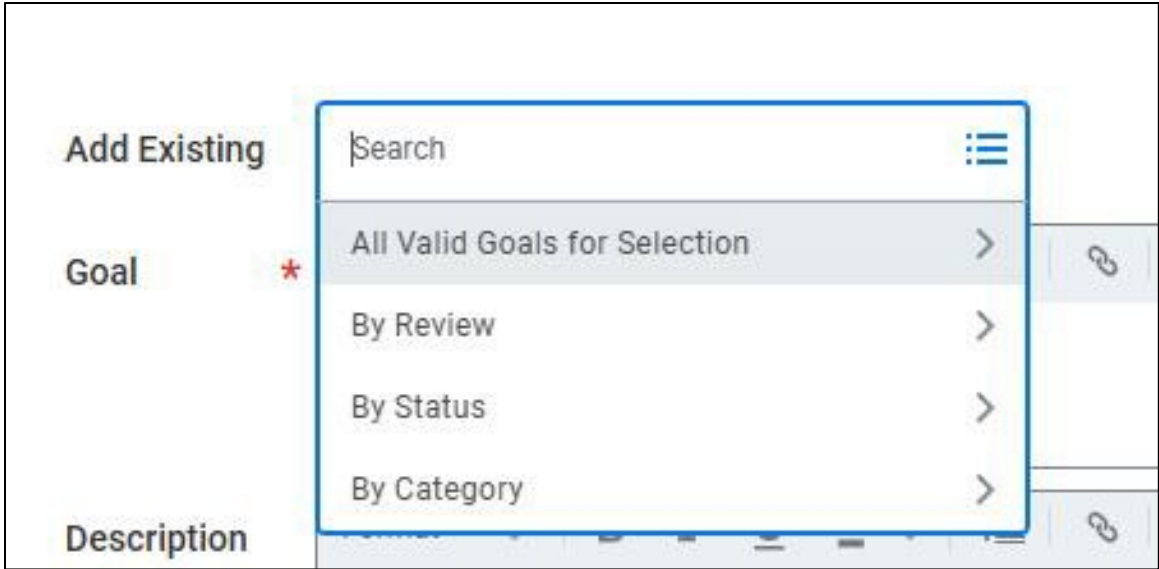
1. Go to your **Workday homepage** and click either the **Set Content** or **Self-Evaluation** step in your inbox. This example uses the Set Content step, but the process in the Self-Evaluation step is the same.
2. Go into the task and go through the first two steps:
 - a. **Teammate Self-Evaluation** - filling in the questions on top competencies and tools to do your job.
 - b. **Teammate Competencies** – filling in the comments section.
3. On the **Teammate SMART Goals** page, if there are 2025 goals, those need to be removed from the review. If 2024 goals are missing, they need to be added. Note that in this example, no goals pull on the evaluation. All the goals from the evaluation period must be added manually.
 - a. To add goals: click **Add**



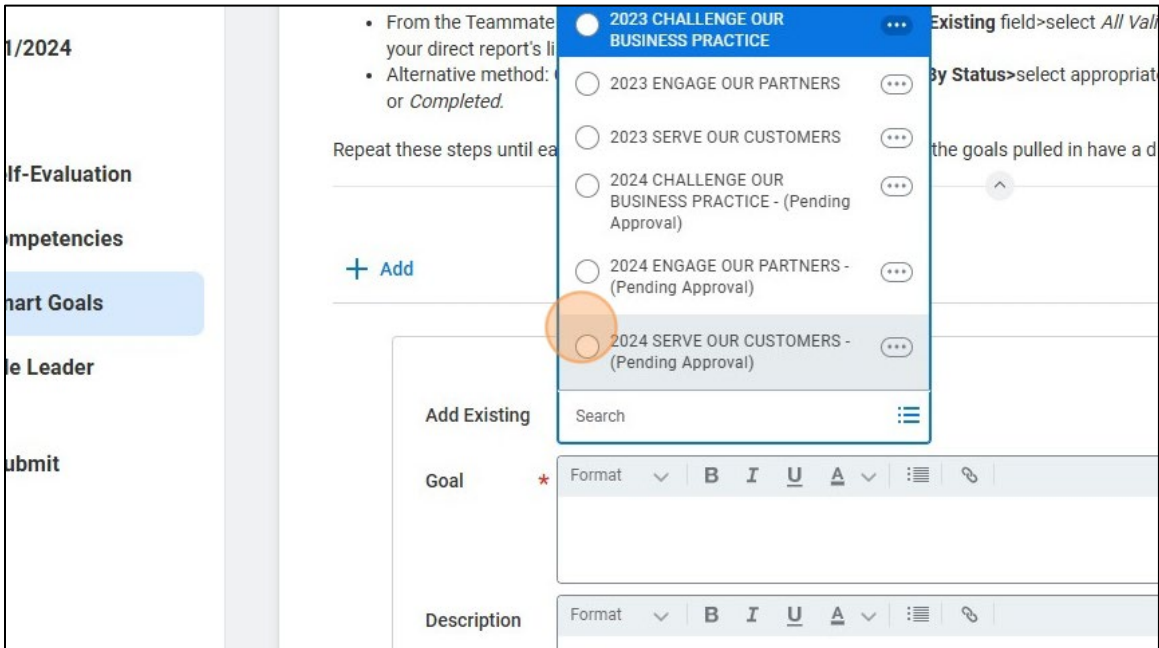
b. Click in the Search box.



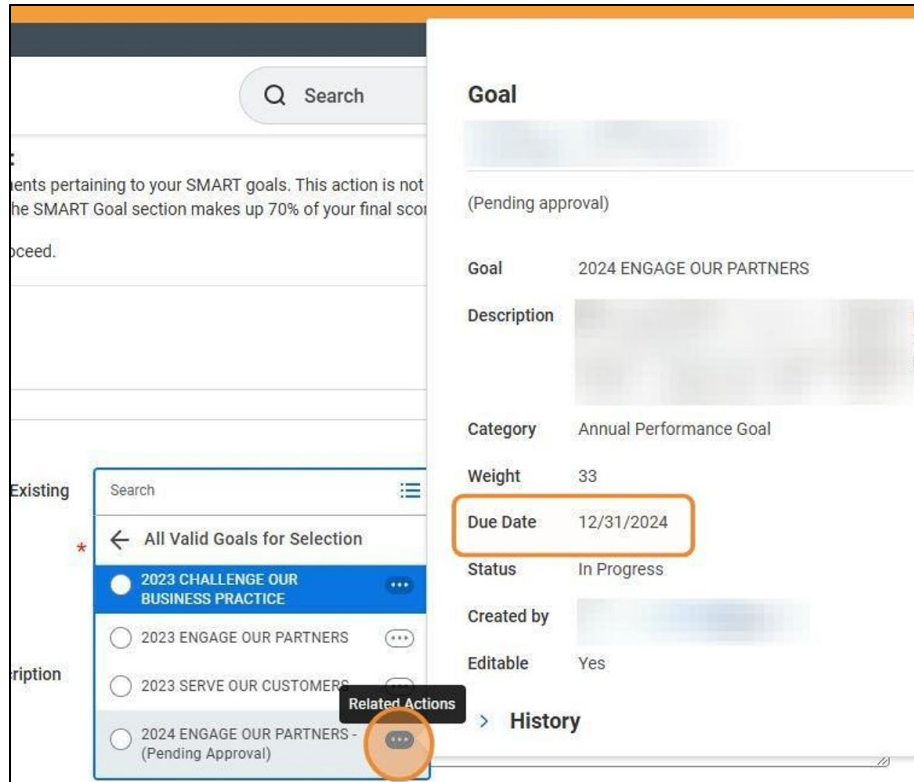
c. Click **All Valid Goals for Selection** (or you can use any option to find the goals)



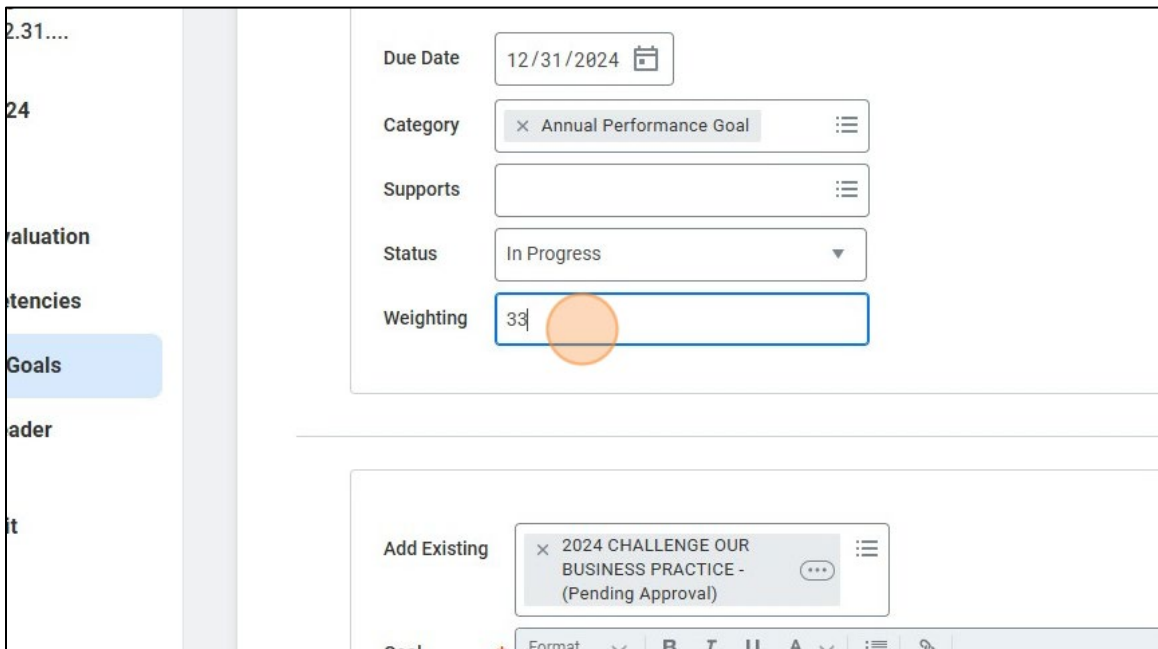
d. Select the first goal to add in



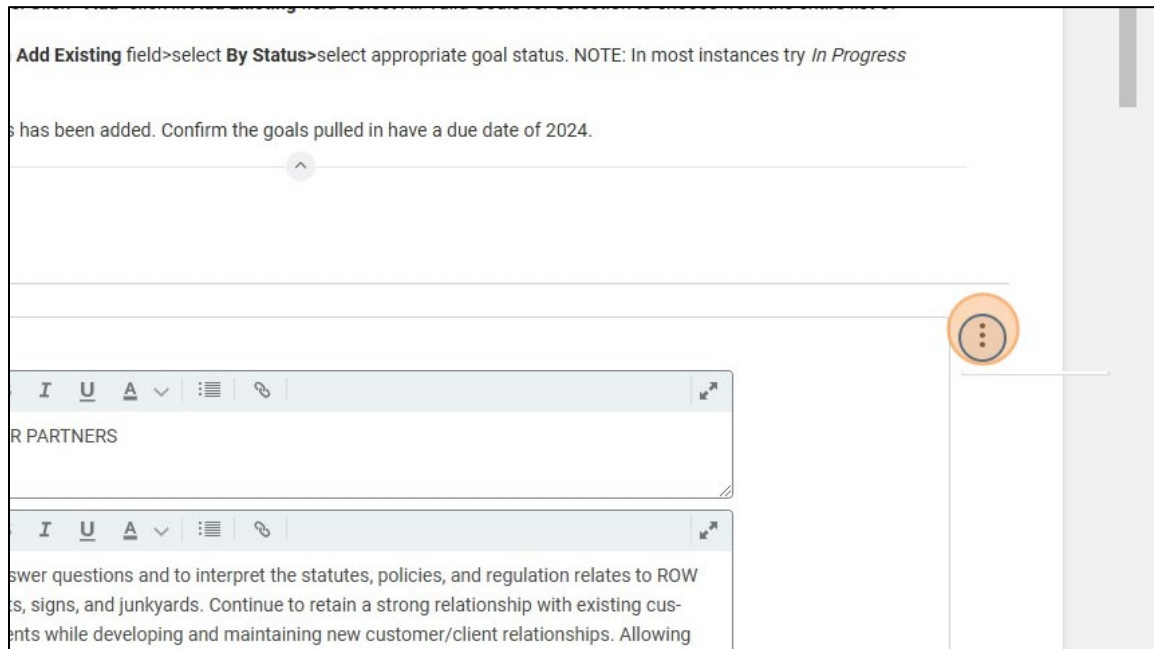
i. If you're not sure which goal is the correct one, click the three dots next to the goal title to open a dialog box that shows you the goal details.



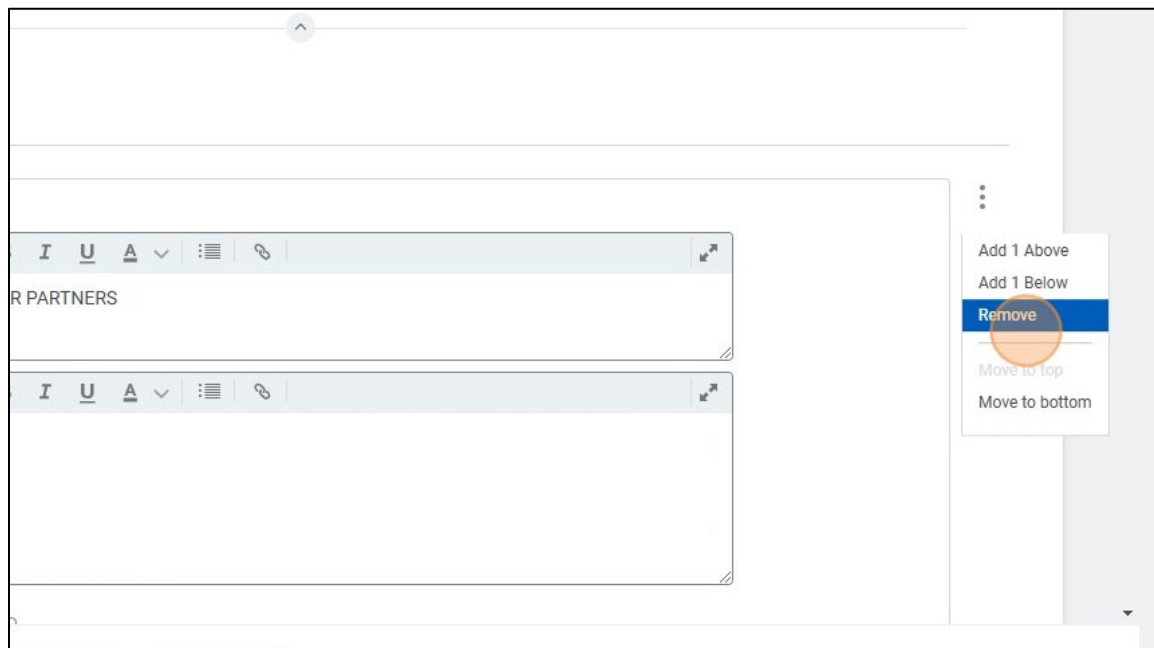
- e. When you select the goal title, it will automatically populate the rest of the details. Then continue to add the remaining goals.
- f. Once you have added all the goals, check that the weights add up to 100



4. To remove a goal, on the right-hand side of the goal, click the three dots

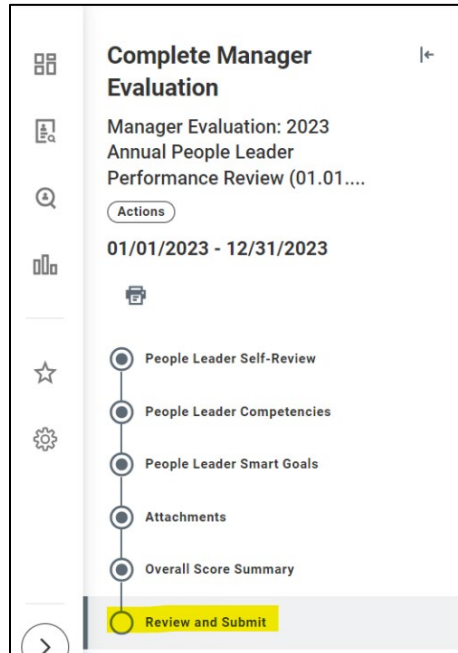


5. Click **Remove**

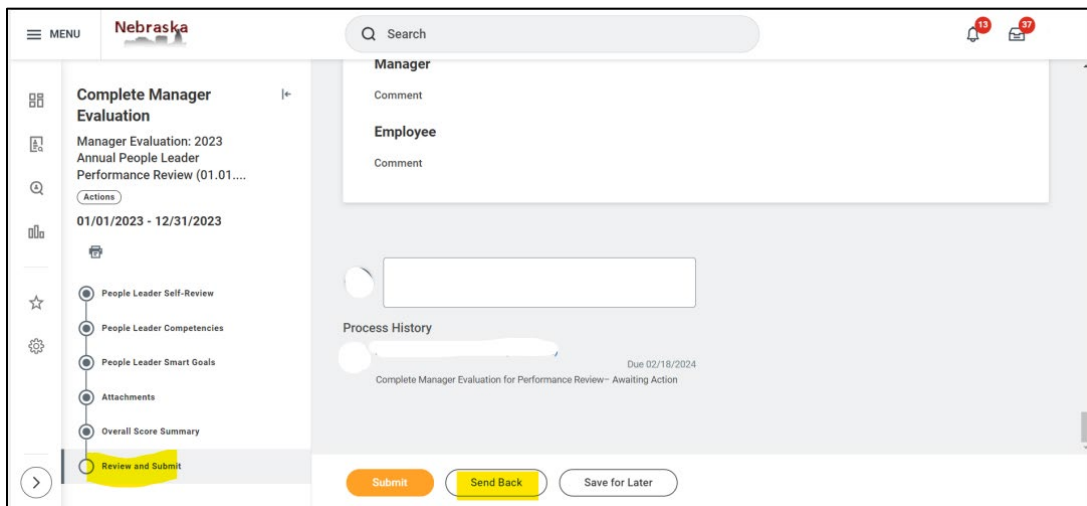


Send Back Performance Review

1. Click into the teammate's review in your inbox, then click **Get Started**.
2. Go to the **Review and Submit** page using the menu on the left of the page.



3. Scroll to the bottom of the **Review and Submit** page and click **Send Back**.



4. In the **To** field, select the step you need to send the review back to. **Make sure you send it back to the correct step. If you send it back to the Set Content step, you have to walk through all the review steps again.**

The screenshot shows the 'Send Back' form with the 'Reason' dropdown menu open. The 'To' field contains a search bar. The 'Reason' field has two options: '- Set Review Content' (marked with a red X) and 'Previously Awaiting Person: Complete Self Evaluation' (marked with a green checkmark). The 'Submit' and 'Cancel' buttons are visible at the bottom.

5. Type in a reason for why you're sending this review back to a previous step. It can be simple and short.

The screenshot shows the 'Send Back' form with the 'Reason' field filled with a yellow highlight. The 'To' field now displays 'Previously Awaiting Person: Complete Self Evaluation' with a close button (X) and a menu icon (three lines). The 'Submit' and 'Cancel' buttons are visible at the bottom.

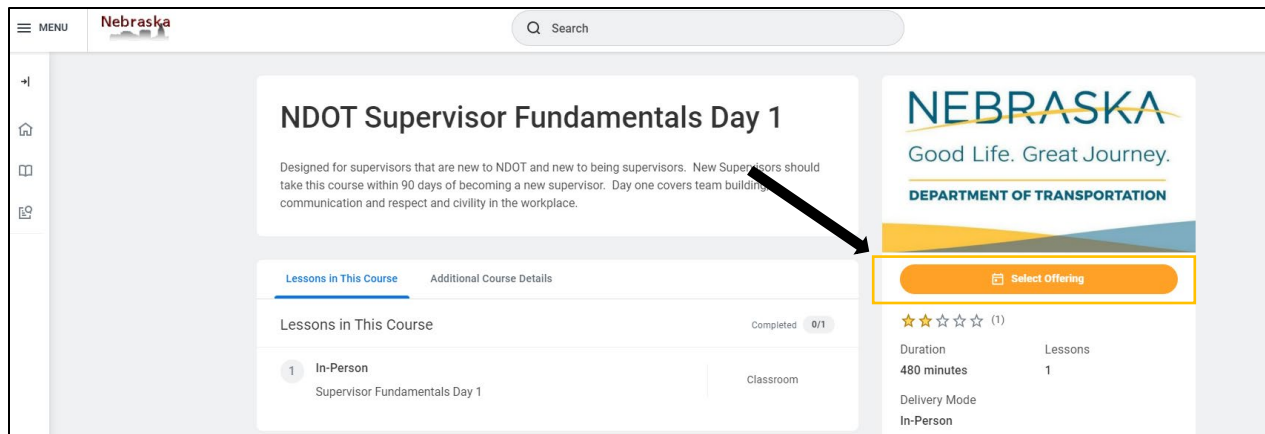
6. Click **Submit**. It will then go to that person's Workday inbox for them to do that step.

Manage Learner Enrollment

Learners can be enrolled in courses with or without due dates.

Learner Self-Enroll

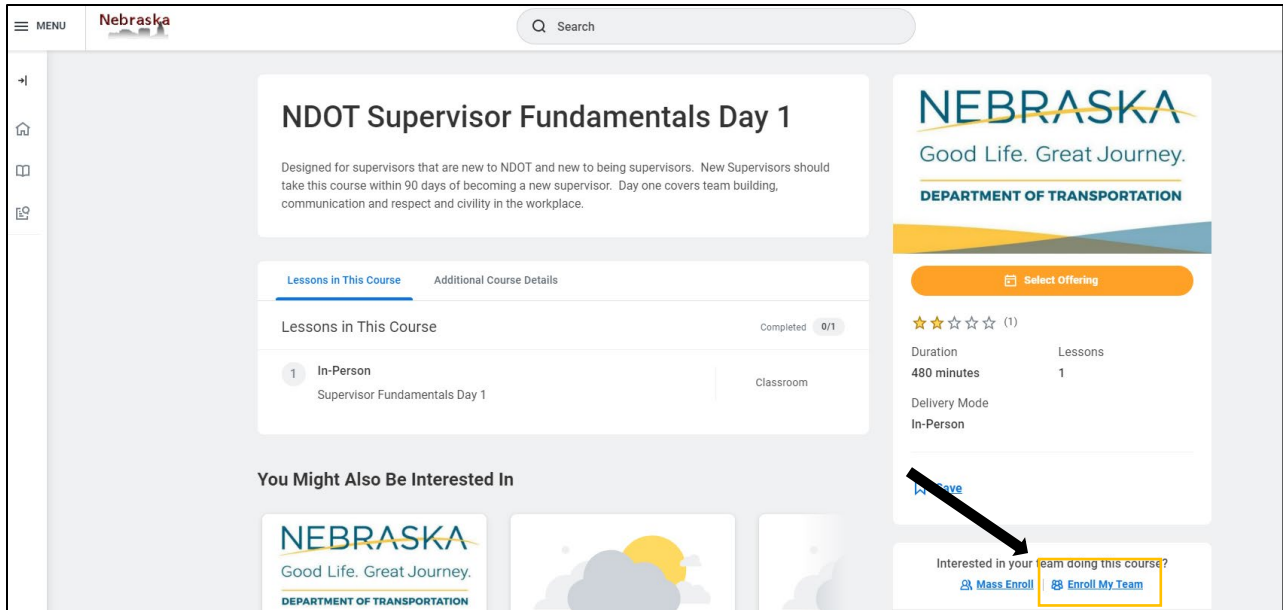
1. In **Workday Learning app**, select the desired course.
2. Click **Select Offering** or **Enroll**.
3. Complete the enrollment steps as indicated on the screen.



Enroll Your Team

Supervisors are only able to enroll their direct reports. If you are in a higher level position and need to enroll the team of your direct reports, contact your designated Training Coordinator.

1. In the **Workday Learning app**, select the desired course you wish you enroll your teammates in.
2. Select **Enroll My Team**.



3. If the course has multiple offerings, check the box next to the desired offering you wish to enroll your team in, then select **OK**.

Course Offerings

No Filters Applied Saved Filters

Open Offerings 11 Items

Select Offering	Start Date	End Date	Attendance Type	Location	Availability	Offering Number	Status
<input type="checkbox"/>	Wed, Oct 16, 2023, 8:30 AM Central Time (Chicago)	Wed, Oct 16, 2023, 4:30 PM Central Time (Chicago)	In-Person		Full	134980	Open
<input type="checkbox"/>	Wed, Oct 16, 2023, 8:30 AM Central Time (Chicago)	Wed, Oct 16, 2023, 4:30 PM Central Time (Chicago)	In-Person		20 out of 20 Seats Available	134985	Open
<input type="checkbox"/>	Tue, Nov 14, 2023, 8:30 AM Central Time (Chicago)	Tue, Nov 14, 2023, 4:30 PM Central Time (Chicago)	In-Person		1 out of 28 Seats Available	134979	Open
<input type="checkbox"/>	Tue, Nov 28, 2023, 8:30 AM Central Time (Chicago)	Tue, Nov 28, 2023, 4:30 PM Central Time (Chicago)	In-Person		4 out of 20 Seats Available	134981	Open
<input type="checkbox"/>	Wed, Dec 13, 2023, 8:30 AM Central Time (Chicago)	Wed, Dec 13, 2023, 4:30 PM Central Time (Chicago)	In-Person		11 out of 20 Seats Available	134982	Open
<input type="checkbox"/>	Wed, Jan 31, 2024, 8:30 AM Central Time (Chicago)	Wed, Jan 31, 2024, 4:30 PM Central Time (Chicago)	In-Person		Full	134983	Open
<input type="checkbox"/>	Tue, Apr 9, 2024, 8:30 AM Central Time (Chicago)	Tue, Apr 9, 2024, 4:30 PM Central Time (Chicago)	In-Person	NDOT The Hill - Lincoln	17 out of 20 Seats Available		Open
<input type="checkbox"/>	Mon, Jun 24, 2024, 8:30 AM Central Time (Chicago)	Mon, Jun 24, 2024, 4:30 PM Central Time (Chicago)	In-Person	NDOT D3 HQ - Norfolk	20 out of 20 Seats Available		Open
<input type="checkbox"/>	Wed, Aug 21, 2024, 8:30 AM Central Time (Chicago)	Wed, Aug 21, 2024, 4:30 PM Central Time (Chicago)	In-Person	NDOT D6 HQ - North Platte	18 out of 20 Seats Available		Open
<input type="checkbox"/>	Wed, Oct 9, 2024, 8:30 AM Central Time (Chicago)	Wed, Oct 9, 2024, 4:30 PM Central Time (Chicago)	In-Person	NDOT The Hill - Lincoln	20 out of 20 Seats Available		Open

4. Under **Assigned as Required** Learning, select **Yes** or **No**.

Review

NDOT Supervisor Fundamentals Day 1

Dates Tue, Apr 9, 2024, 8:30 AM Central Time (Chicago) - 4:30 PM Central Time (Chicago)

Designed for supervisors that are new to NDOT and new to being supervisors. New Supervisors should take this course within 90 days of becoming a new supervisor. Day one covers team building, communication and respect and civility in the workplace.

Seats Available 17

Assign as Required Learning

Yes

No

- a. If you select **Yes**, a **Due Date** field will appear. Select either **Date** or **Duration**.


Due Date

Due Date Type

- b. If you select **Date**, assign the date for which the training needs to be completed by.

Due Date

Due Date Type

Due Date * 

- c. If you select **Duration**, indicate the **Duration Unit** (Days, Weeks, Months, Years) then enter a numerical value in the **Duration** field. Example: If you want your staff to complete the training within 30 days, select **Days** for Duration Unit, then enter **30** for

Duration.

Due Date

Due Date Type








Duration Unit *

Duration *

5. Check the box next to all teammates you wish to enroll in the training.
 - a. If you want to enroll your entire team, check the box at the top of the column to select all teammates.

Workers Ineligible

Workers 7

<input type="checkbox"/>	Photo	Name	Location
<input type="checkbox"/>		Jeffrey L. Kaplius (80006782)	NDOT D2 - Elkhorn
<input checked="" type="checkbox"/>		Ryan A. Herman (80017490)	NDOT D2 - Elkhorn
<input type="checkbox"/>		John C. Zymola Jr. (80038697)	NDOT D2 - Elkhorn
<input type="checkbox"/>		Randy W. Adams (80040058)	NDOT D2 - Elkhorn
<input type="checkbox"/>		Dominique N. Davis Dom N. Davis (80046834)	NDOT D2 - Elkhorn
<input type="checkbox"/>		Tyler Jeffrey Scott Moore (80047687)	NDOT D2 - Elkhorn
<input type="checkbox"/>		Louis Ulferts (80048031)	NDOT D2 - Elkhorn

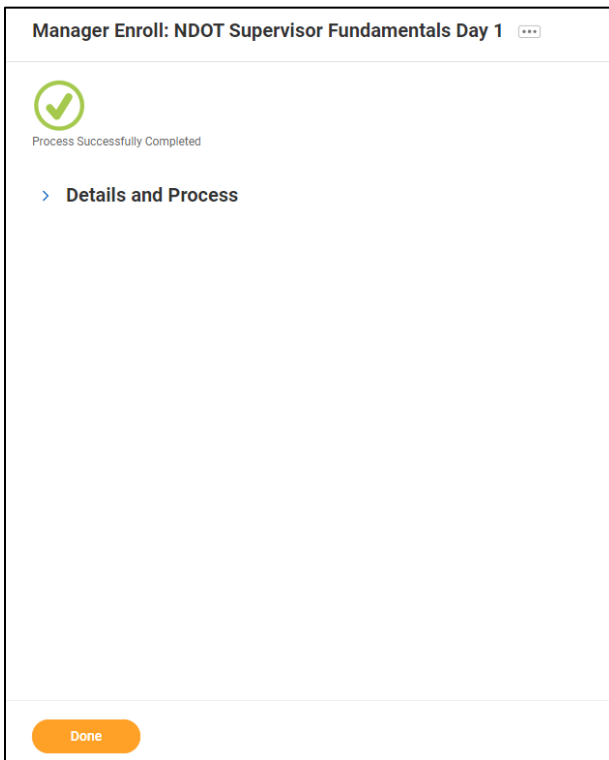
- b. If teammates are already enrolled in the training, they will appear as Ineligible on the enrollment page.

Photo	Name	Location	Error
	Ryan A Herman (80017490)	NDOT D2 - Elkhorn	Ryan A Herman (80017490) is not eligible for enrollment in this content.
	Taylor S Cascaden (80031578)	NDOT D2 - Elkhorn	Taylor S Cascaden (80031578) is not eligible for enrollment in this content.
	John C Zymola Jr (80038697)	NDOT D2 - Elkhorn	John C Zymola Jr (80038697) is not eligible for enrollment in this content.
	Randy W Adams (80040058)	NDOT D2 - Elkhorn	Randy W Adams (80040058) is not eligible for enrollment in this content.
	Dominique N Davis Dom N Davis (80046834)	NDOT D2 - Elkhorn	Dominique N Davis Dom N Davis (80046834) is not eligible for enrollment in this content.
	Tyler Jeffrey Scott Moore (80047687)	NDOT D2 - Elkhorn	Tyler Jeffrey Scott Moore (80047687) is not eligible for enrollment in this content.
	Louis Ufferts (80048031)	NDOT D2 - Elkhorn	Louis Ufferts (80048031) is not eligible for enrollment in this content.

6. Once you have selected all the teammates you wish to enroll, click **Submit**.



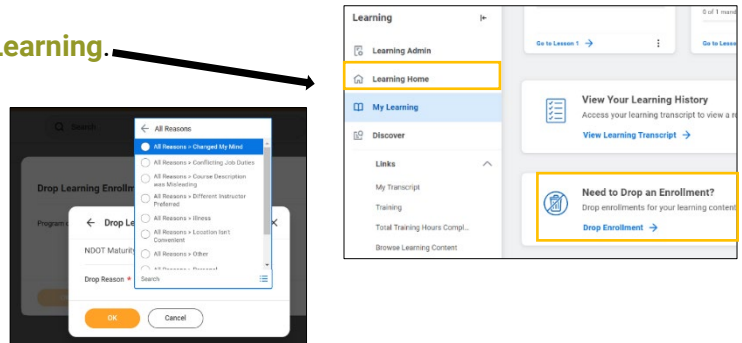
7. After you click Submit, you will be redirected to a confirmation page. Click **Done**.



Learner Self-Drop

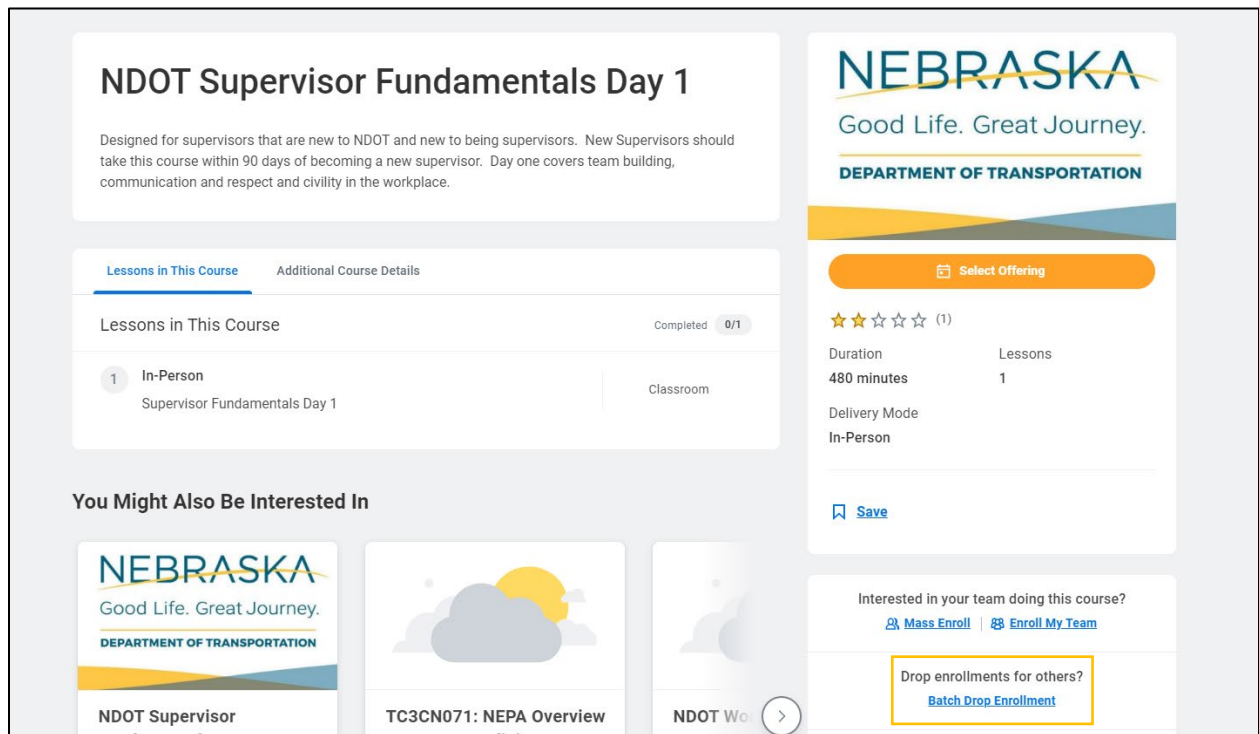
Learners can self-drop from self-enrolled courses with no approval process intervention.

1. In the **Workday Learning app**, select **My Learning**.
2. Scroll down and click **Drop Enrollment**.
3. Enter and select the course to drop.
4. Select the **Drop Reason**.
5. Click **OK**, then **Done**.



Batch Drop Enrollment

1. In the **Workday Learning app**, select the desired course you wish to drop for your teammate(s).
2. Click **Drop Batch Enrollment**.



- If the course has multiple offerings, check the box next to the offering, then click **OK**.

Mass Drop by Role

Select an offering on the Open Offerings or In Progress / Closed tab.

Open Offerings | In Progress / Closed

No Filters Applied Saved Filters

Open Offerings 11 Items

Select Offering	Start Date	End Date	Attendance Type	Location	Availability	Offering Number	Status
<input type="checkbox"/>	Wed, Oct 18, 2023, 8:30 AM Central Time (Chicago)	Wed, Oct 18, 2023, 4:30 PM Central Time (Chicago)	In-Person		Full	134980	Open
<input type="checkbox"/>	Wed, Oct 18, 2023, 8:30 AM Central Time (Chicago)	Wed, Oct 18, 2023, 4:30 PM Central Time (Chicago)	In-Person		20 out of 20 Seats Available	134985	Open
<input type="checkbox"/>	Tue, Nov 14, 2023, 8:30 AM Central Time (Chicago)	Tue, Nov 14, 2023, 4:30 PM Central Time (Chicago)	In-Person		1 out of 28 Seats Available	134979	Open
<input type="checkbox"/>	Tue, Nov 28, 2023, 8:30 AM Central Time (Chicago)	Tue, Nov 28, 2023, 4:30 PM Central Time (Chicago)	In-Person		4 out of 20 Seats Available	134981	Open
<input checked="" type="checkbox"/>	Wed, Dec 13, 2023, 8:30 AM Central Time (Chicago)	Wed, Dec 13, 2023, 4:30 PM Central Time (Chicago)	In-Person		11 out of 20 Seats Available	134982	Open
<input type="checkbox"/>	Wed, Jan 31, 2024, 8:30 AM Central Time (Chicago)	Wed, Jan 31, 2024, 4:30 PM Central Time (Chicago)	In-Person		Full	134983	Open
<input type="checkbox"/>	Tue, Apr 9, 2024, 8:30 AM Central Time (Chicago)	Tue, Apr 9, 2024, 4:30 PM Central Time (Chicago)	In-Person	NDOT The Hill - Lincoln	10 out of 20 Seats Available		Open
<input type="checkbox"/>	Mon, Jun 24, 2024, 8:30 AM	Mon, Jun 24, 2024, 4:30 PM	In-Person	NDOT D3 HO - Norfolk	20 out of 20 Seats Available		Open

OK

- Click in the **Drop Enrollment Reason** field, then click **All Reasons**.

Mass Drop by Role

NDOT Supervisor Fundamentals Day 1

Dates Wed, Jan 31, 8:30 AM Central Time (Chicago) - 4:30 PM Central Time (Chicago)

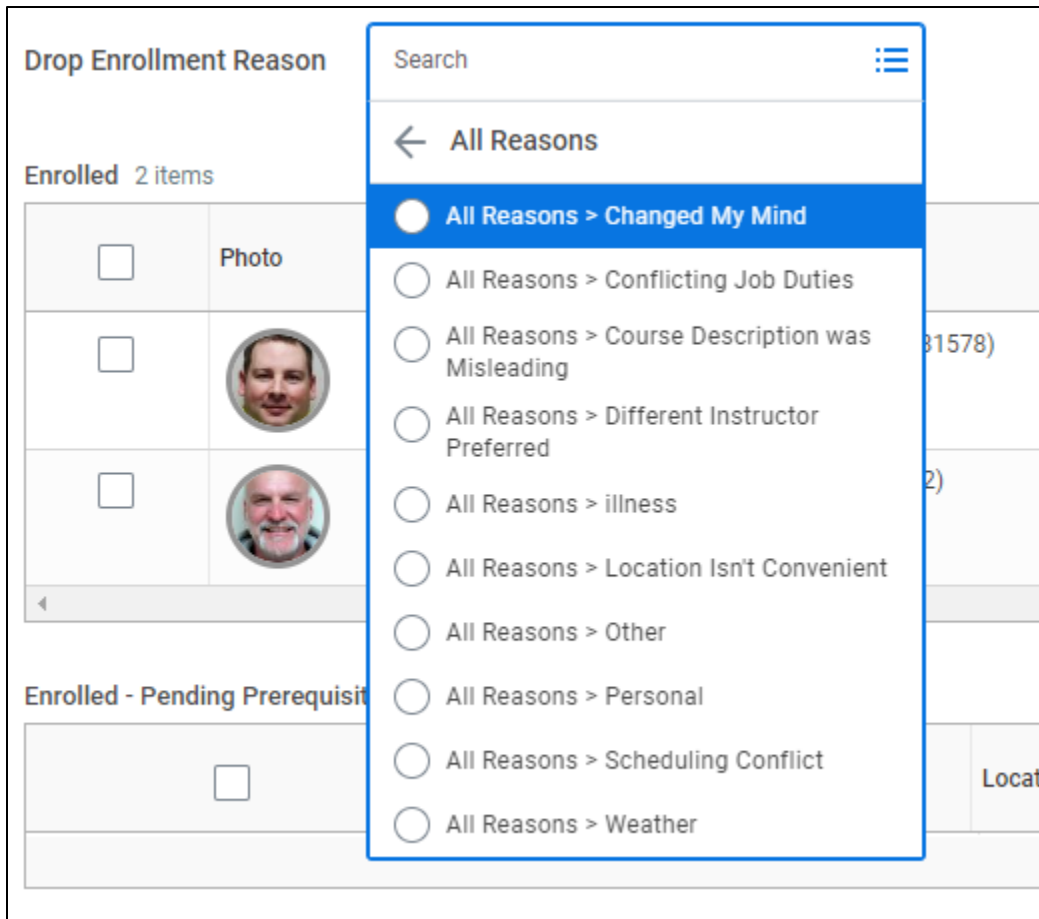
Designed for supervisors that are new to NDOT and new to being supervisors. New Supervisors should take this course within 90 days of becoming a new supervisor. Day one covers team building, communication and respect and civility in the workplace.

Drop Enrollment Reason

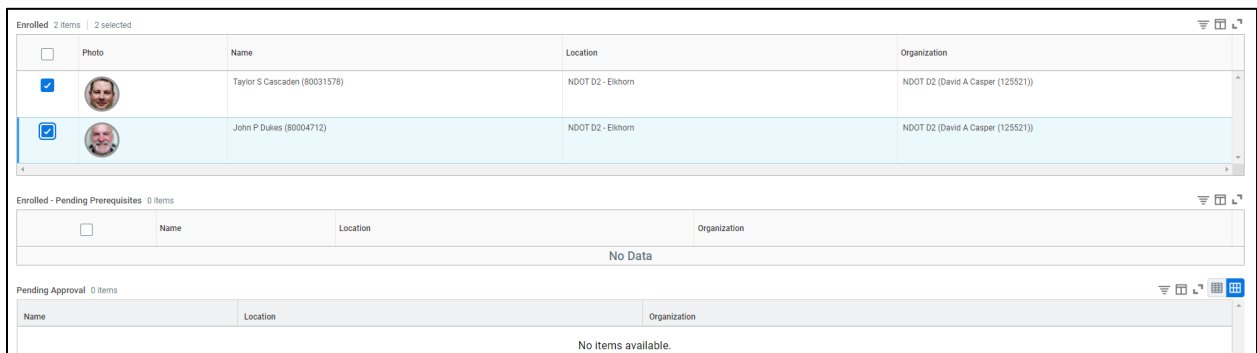
Enrolled 2 Items

Photo	Name	Location	Organization
	Taylor S Cascaden (80031578)	NDOT D2 - Elkhorn	NDOT D2 (David A Casper (125521))
	John P Dukes (80004712)	NDOT D2 - Elkhorn	NDOT D2 (David A Casper (125521))

- A dropdown will appear under **All Reasons**, select the reason for dropping enrollment.



- Check the box next to the teammates you wish to drop from the training, then select OK.



- You will be redirected to a confirmation page that the Learning Mass Drop was completed.

