KEAN | workday

My Guide

Managerial Evaluation Instructional Guide for Managers & Next-Level Supervisors

The Kean | Workday MyGuide is intended for the following users:

Managerial Supervisors and
Senior Management

Instructional Guide for Supervisors & Next-Level Management

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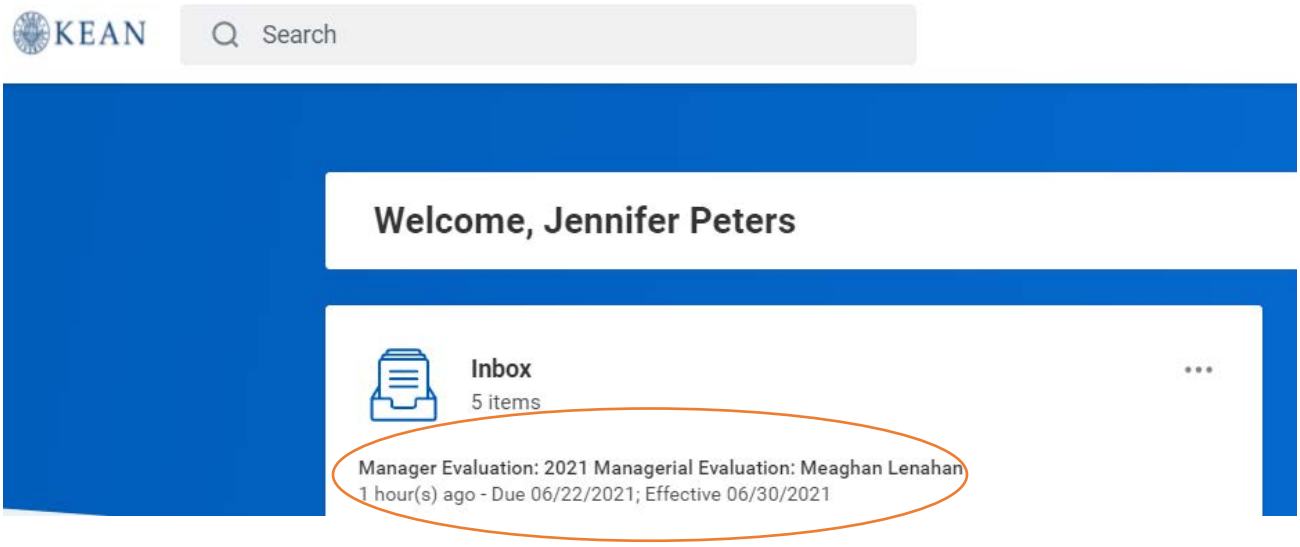
IMMEDIATE MANAGERIAL SUPERVISOR'S EVALUATION
["COMPLETE MANAGER EVALUATION" STEP]

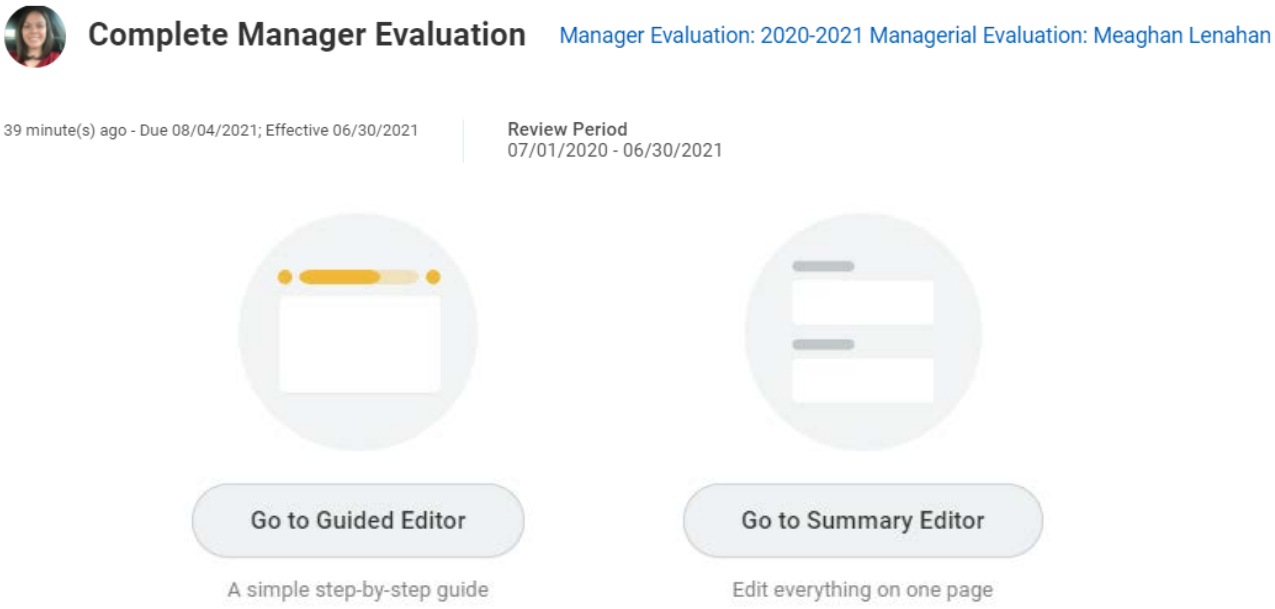
After the employee has completed their Self-Evaluation, the evaluation will route to the immediate managerial supervisor. The Manager Evaluation step will display as a task in the supervisor's Workday inbox.



When clicking into the evaluation task, the supervisor will be presented with two view options: Guided Editor and Summary Editor. Please refer to images on the next page.

*Note that this guide includes images using the Guided Editor view.

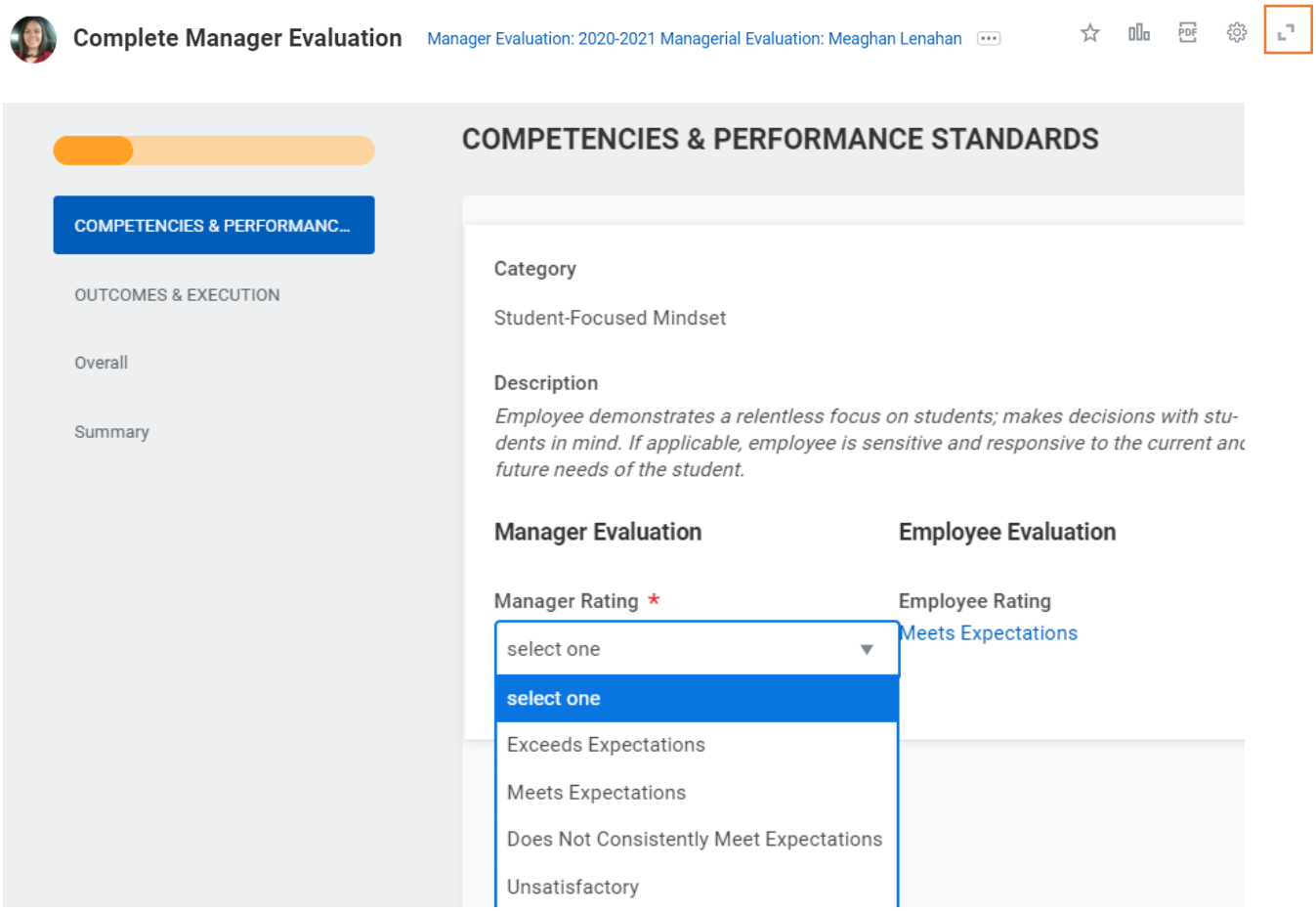
- **Guided Editor** guides the user through the evaluation. Each section will be broken out onto a separate screen for a step-by-step experience as the user moves through the task. Upon completion of both sections, the user will be able to review the evaluation in full before submitting.
- **Summary Editor** allows the user to view all components of the evaluation in one screen. The task will be completed by scrolling from top to bottom until all required sections have been completed.



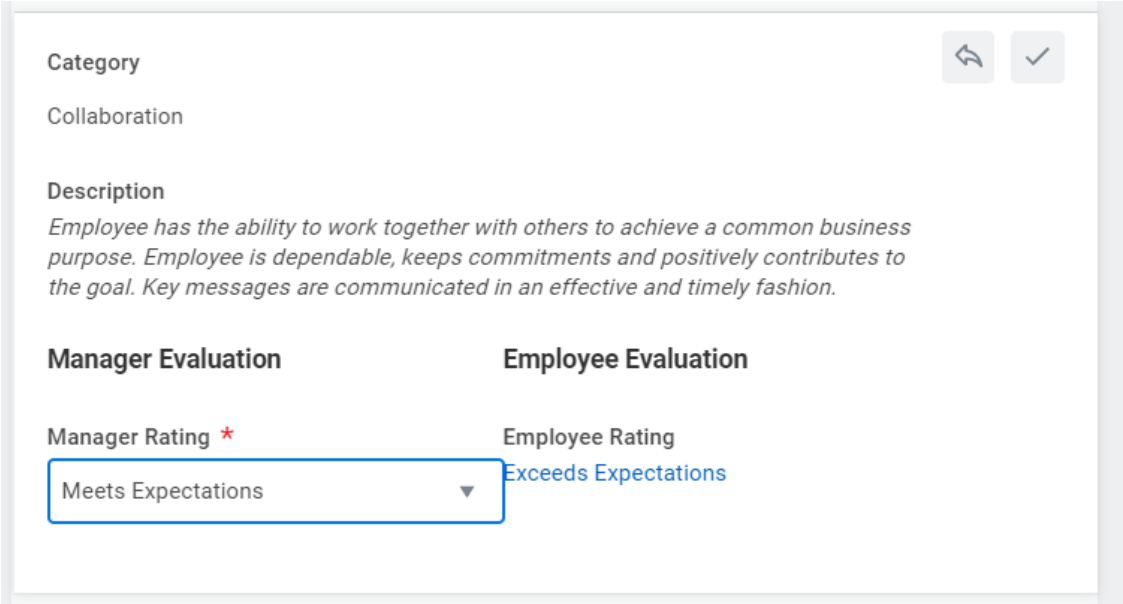
Manager Evaluation Section One: *Competencies & Performance Standards*

Supervisors will be able to click into the box for each category to select their rating on the employee's performance. As the supervisor, you will have access to the employee's Self-Evaluation ratings to the right of your Manager Rating section. Self-Evaluation ratings are informational, and while they can be considered, they do not need to influence your rating(s) as the supervisor.

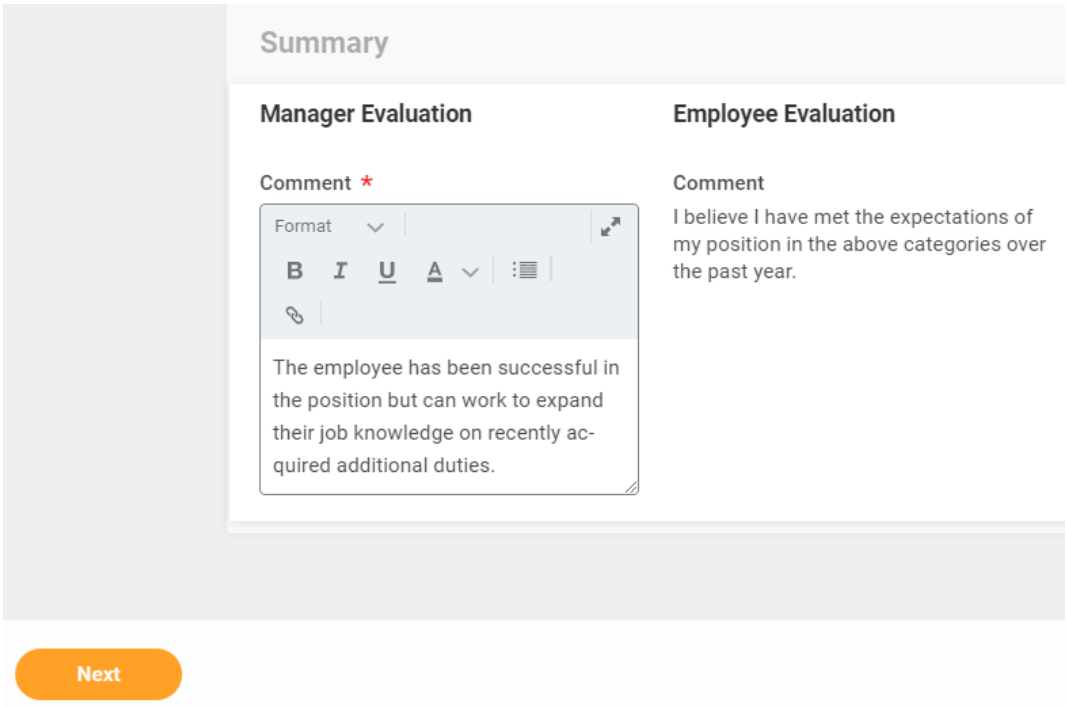
In order to open the Guided Editor view in full screen, you can click on the arrows in the top right of the evaluation screen. In expanding the page using Guided Editor, the evaluation will be broken out into separate sections.



Click into each section to illuminate it and use the drop-down list to select the appropriate ratings for each category. Once you have chosen a rating, it will display in the box opposite the employee's Self-Evaluation rating.

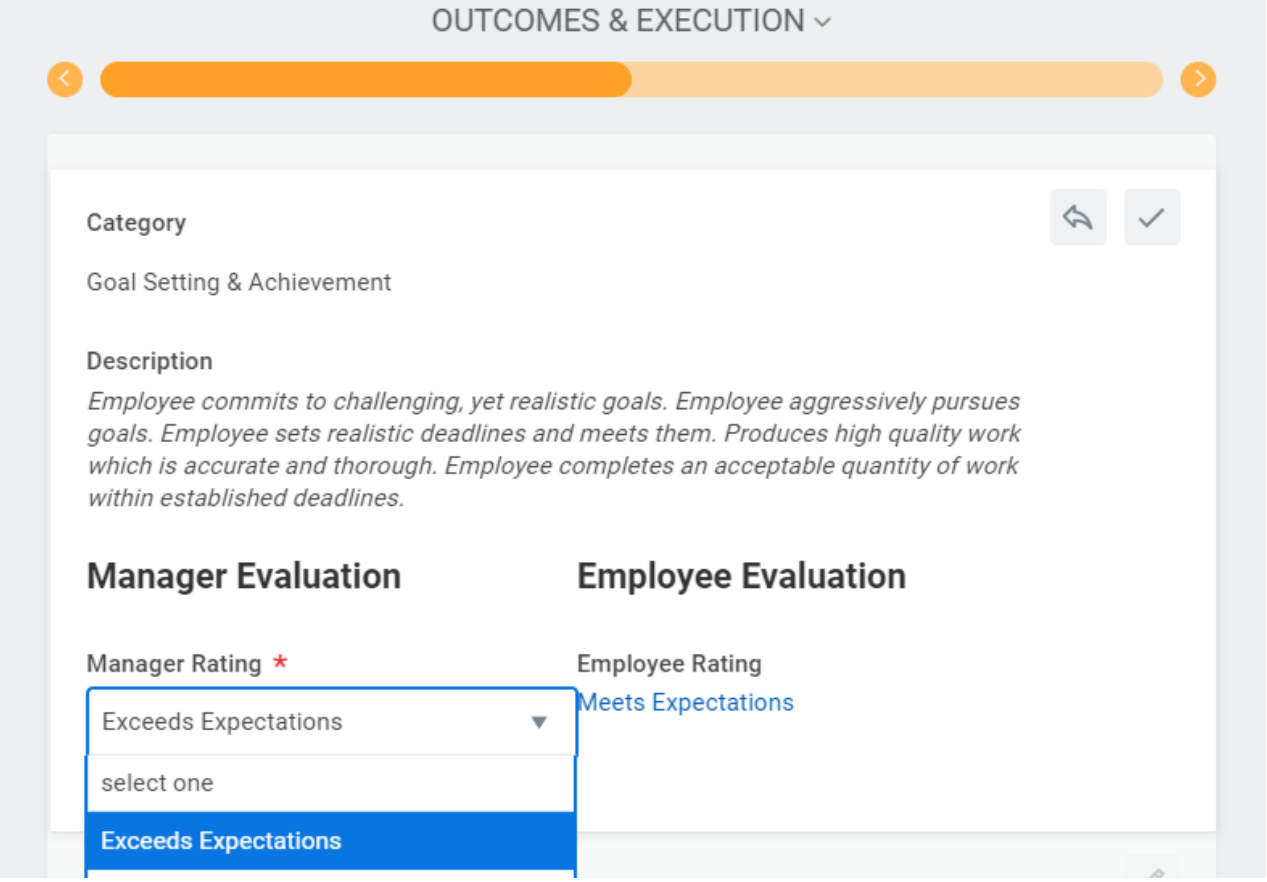


In the **Summary** box for the *Competencies & Performance Standards* section, you should add comments to accompany your ratings. **Comments are required for each section, and specific comments/examples are encouraged for ratings other than Meets Expectations. Once you have added comments, click Next.**

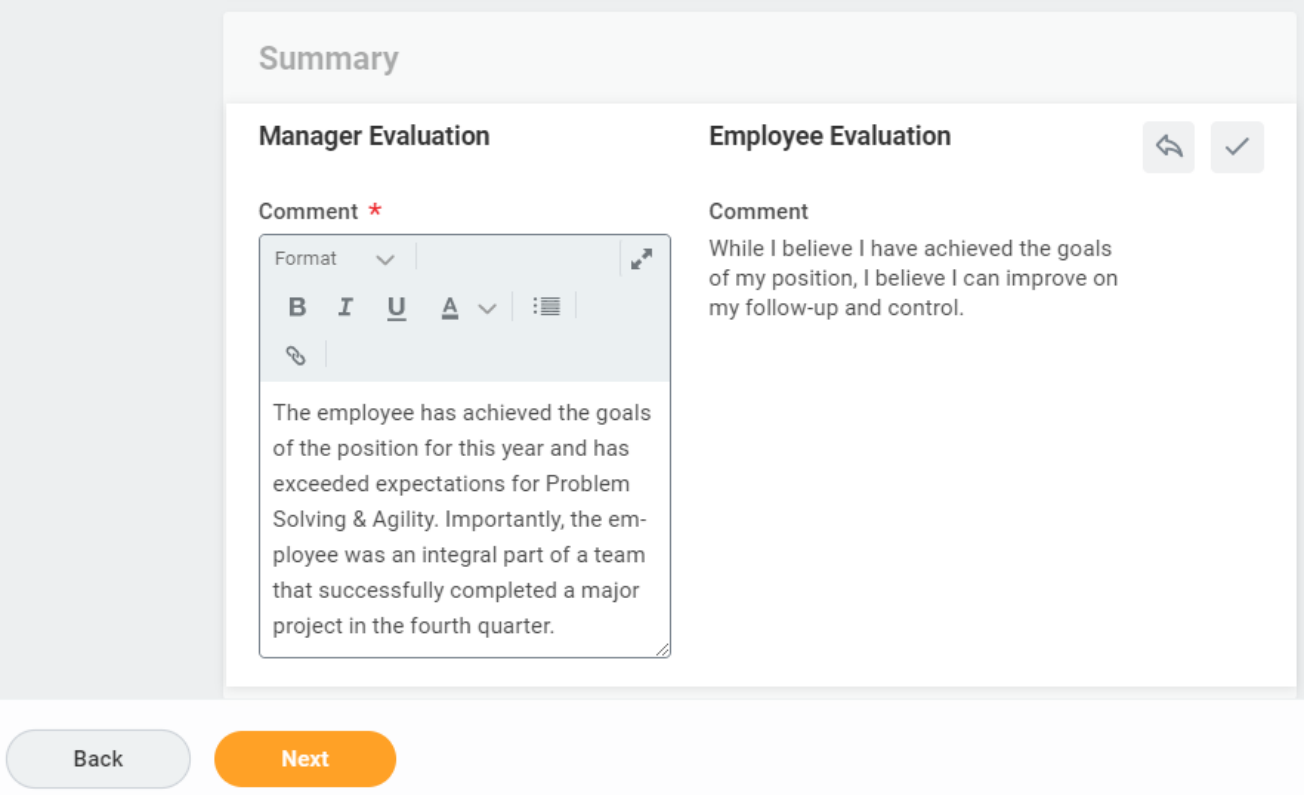


Manager Evaluation Section Two: *Outcomes & Execution*

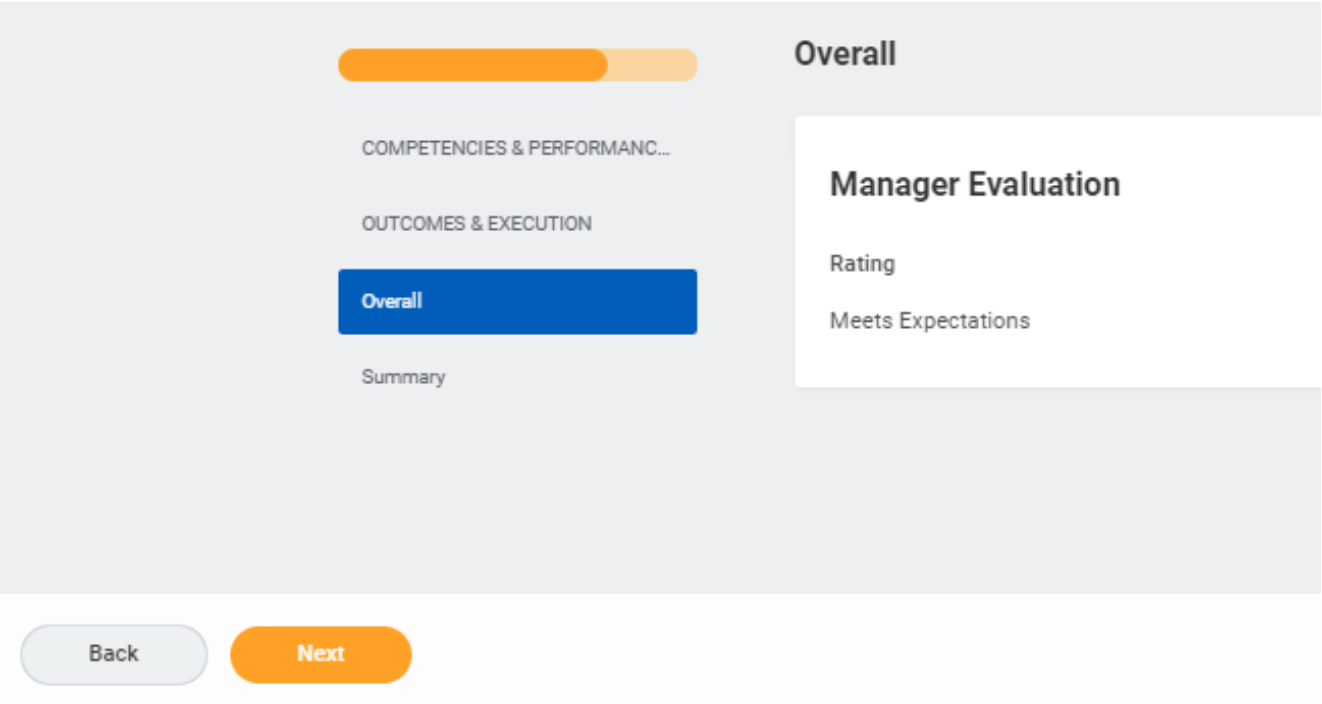
Continue with section two, again clicking into each category to select the appropriate rating in each category.



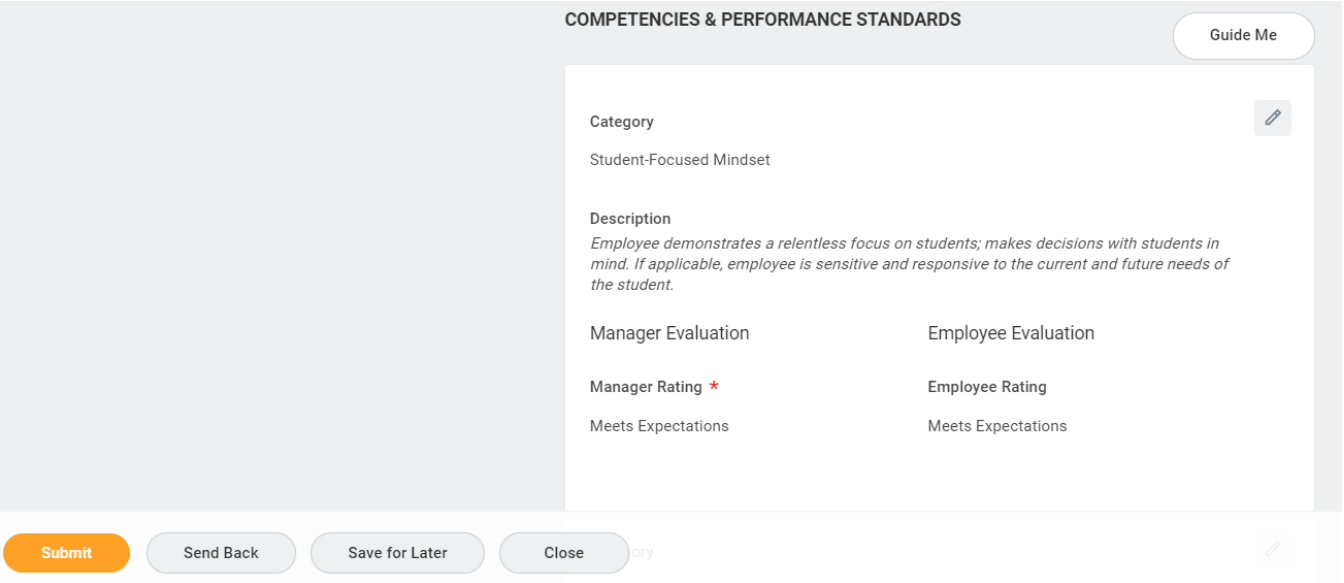
In the **Summary** box, add comments to accompany/substantiate your ratings for the Outcomes & Execution section. **Note that comments are required for each section, and specific comments/examples are encouraged for ratings other than Meets Expectations.** Once you have added the necessary comments, click Next to proceed. If you need to return to the prior section to make changes, click Back to do so.



After submitting a rating for each category, the system will calculate an Overall rating for the employee. The Overall rating is based on a numeric average of all ratings that have been entered and will automatically populate in the evaluation. Review the Overall rating and click Next to continue.



When using Guided Editor view, supervisors will have the option to review the evaluation in full before submitting the evaluation for approval.



While you will be presented with the option to Submit the evaluation, you may also select one of the other options referenced below. Please refer to the following explanations to understand what action will result from each selection.

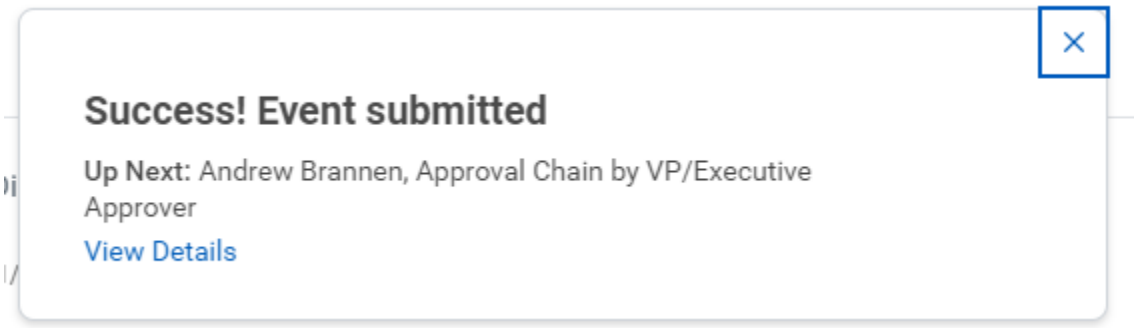
If you **Submit**, the evaluation will move to the Approval Chain step of the evaluation process. This means the evaluation will route to the appropriate next level for approval, including a vice president or senior vice president, if applicable.

If you **Send Back**, the evaluation will route back to the employee for the Self-Evaluation step. ***NOTE:*** *This is not necessary as the employee has autonomy in completing their self-evaluation.*

If you **Save for Later**, you will be able to retain the ratings you have entered and come back another time to edit or finalize it.

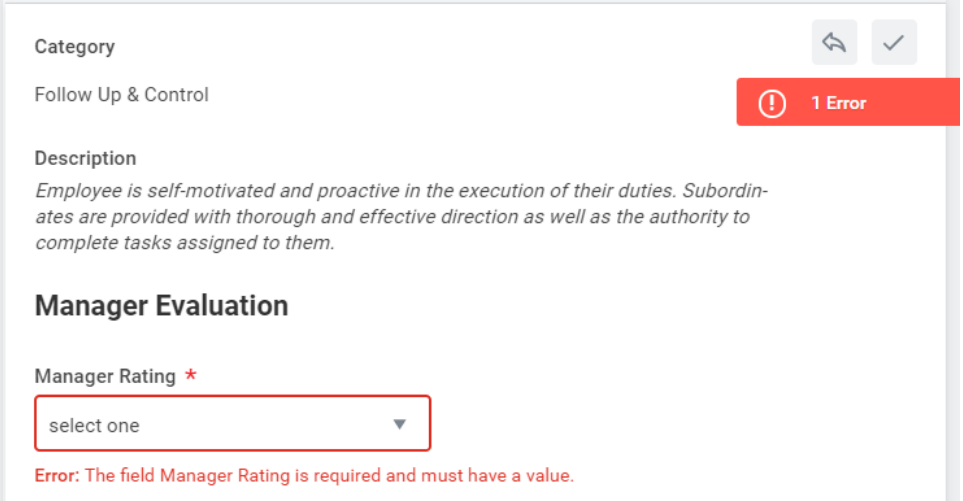
If you **Close**, you will exit out of the evaluation, but your work will be saved.

Once the completed evaluation has been submitted, you will receive an alert indicating that the evaluation has moved to the next step, the approval chain. The system will identify the appropriate vice president/executive approver.



Important Notes on the Manager Evaluation Step

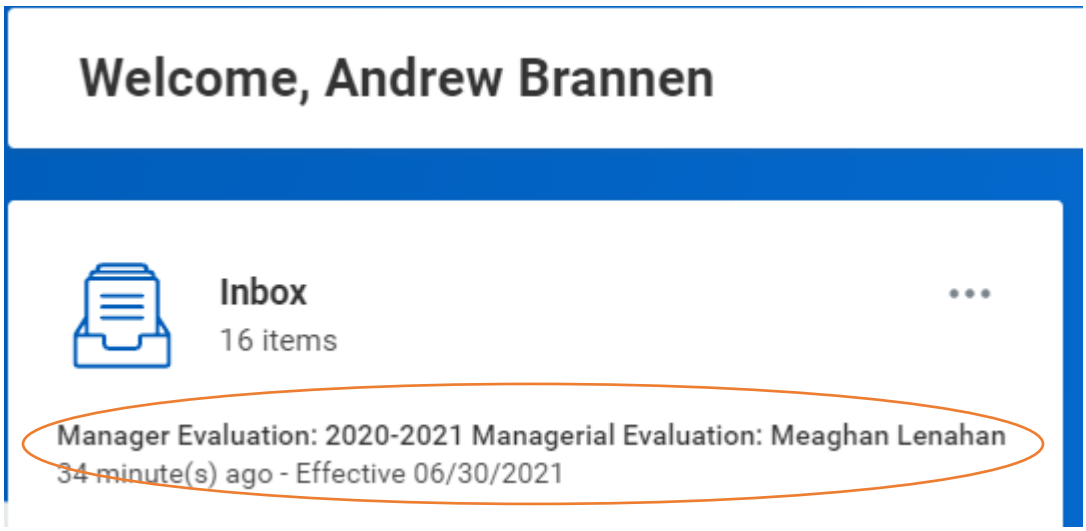
- The evaluation will route to the employee's current immediate manager. For any errors in reporting structure, please email Meaghan Lenahan at lenahanm@kean.edu.
- For employees who have had recent changes in reporting structure, the current and former supervisor should work together to complete the evaluation. Joint feedback may be included in the comments box associated with each section.
- Employees on leave at the time the evaluation cycle is launched will have their Self-Evaluation remain in their Workday inbox until they return from leave. Upon their return, employees and supervisors should work together with Human Resources to ensure the evaluation is completed.
- Required fields of the evaluation include each category's ratings and each section's comments. Failure to complete these fields will result in an error message upon submission. Error messages will appear in red at the top of the user's screen. Users should scroll through the evaluation page to find the red highlighted box(es) to determine which area(s) have been missed and complete them as required before moving the evaluation forward.

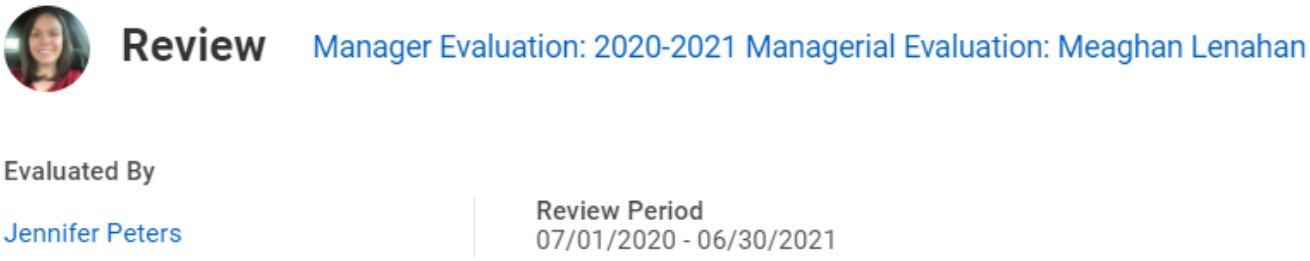


- Deadlines set within the system are not reflective of deadlines established by Human Resources which are available on the Performance Management webpage. All evaluation steps should be completed in accordance with the Managerial Evaluation Calendar.

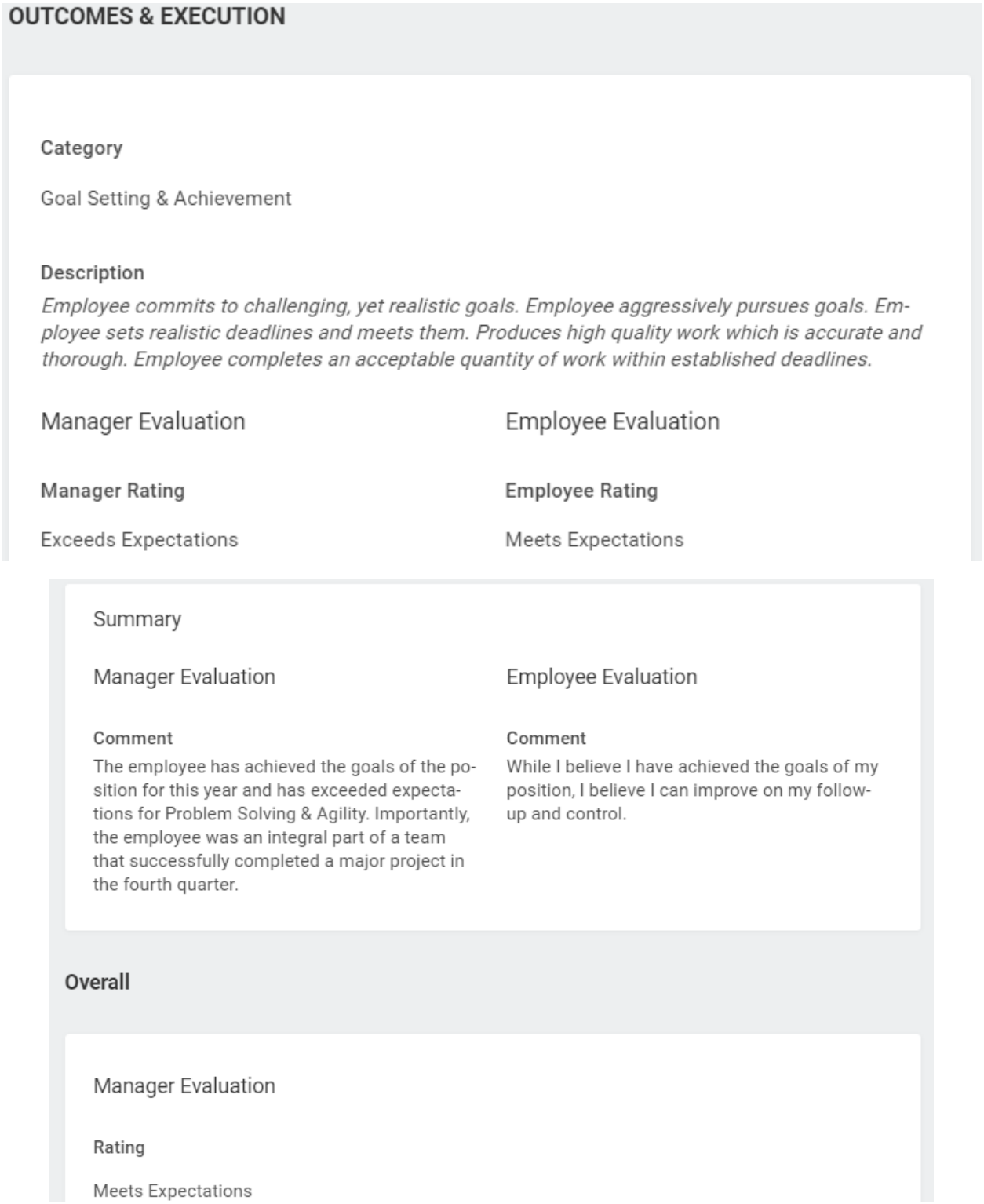
EVALUATION APPROVAL CHAIN

The vice president and senior vice president within the employee's management chain will be required to review and approve the evaluation prior to its completion. Through the evaluation process, the evaluation will route to the appropriate individual(s) within the employee's management chain for approval, appearing as an Approval task in the appropriate next-level manager's Workday inbox.

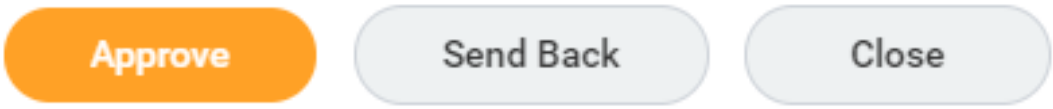




Next-level approvers will have access to the evaluation in its entirety. As a next-level approver, you will be able to review the employee's Self-Evaluation as well as the managerial supervisor's ratings and comments.



Users within the approval chain will have the option to Approve, Send Back or Close. Please refer to the below explanations to understand what action will result from your selection.



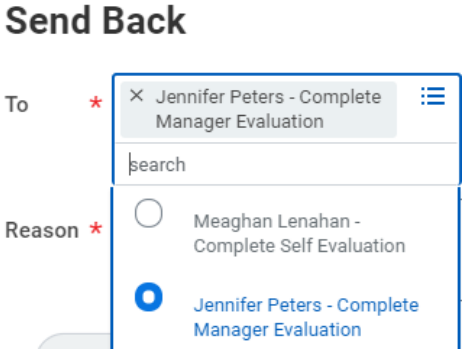
If you **Approve**, the evaluation will route to the next user in the approval chain for final approval, if applicable. If you are the highest user within the employee's management chain, your approval will be recorded and the evaluation will route back to the immediate manager for delivery to the employee.

If you **Send Back,** you may return the evaluation to the immediate supervisor with comments for action or discussion. See below for specific details on this function.

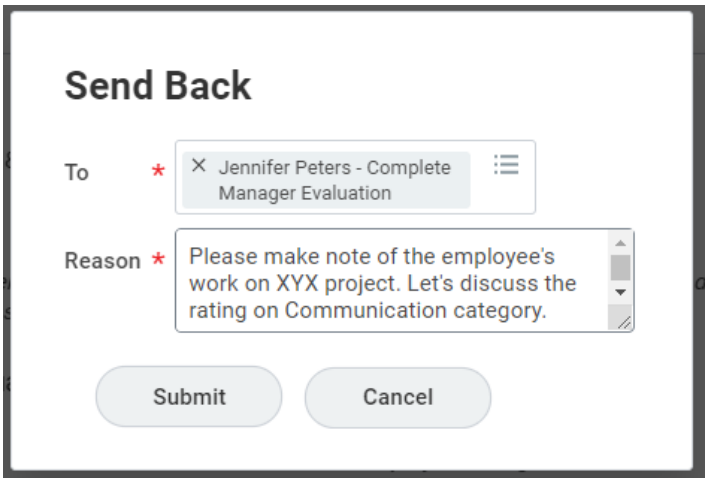
If you **Close**, you will exit out of this inbox item. Your work will be saved and you can return at a later date.

"Send Back" functionality

As the evaluation is an interactive process, the system allows users within the approval chain to send the evaluation back for further action. Next-level approvers will not have the ability to edit the evaluation directly, however, you can use the Send Back function to ensure immediate supervisors include references to significant events that occurred during the evaluation period or to discuss specific ratings.



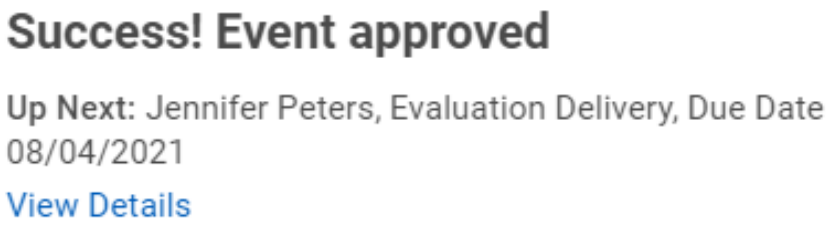
Note that while the option to return the evaluation to the employee is available, the Send Back function should be used to return the review to the evaluating manager. The employee's Self-Evaluation is considered complete at this point in the process.



When using the Send Back function, the sender will be required to add a comment indicating the reason for returning the evaluation to the supervisor. The evaluation will then route back to the selected user for the appropriate action before returning to the approval chain for completion.

Each user within the approval chain must Approve the evaluation in order to move it forward to the next step, Evaluation Delivery ("Provide Manager Review Comments").

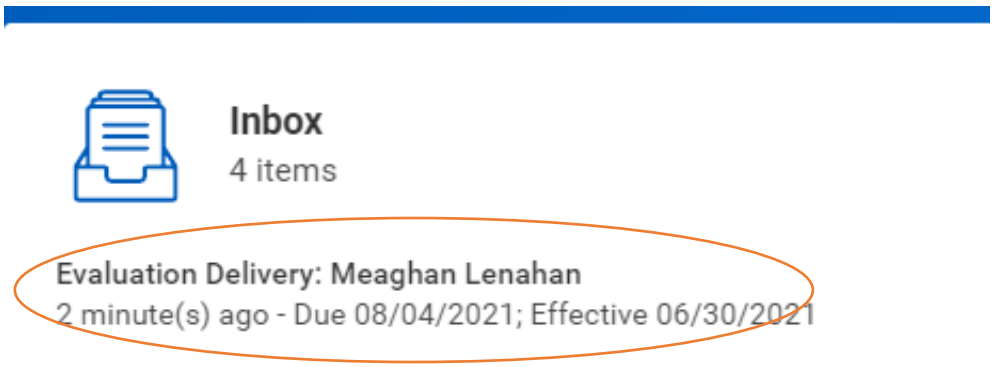
The final user within the approval chain will receive a confirmation message indicating that the approvals have been recorded and the evaluation has moved forward to the next step in the evaluation process- Evaluation Delivery.



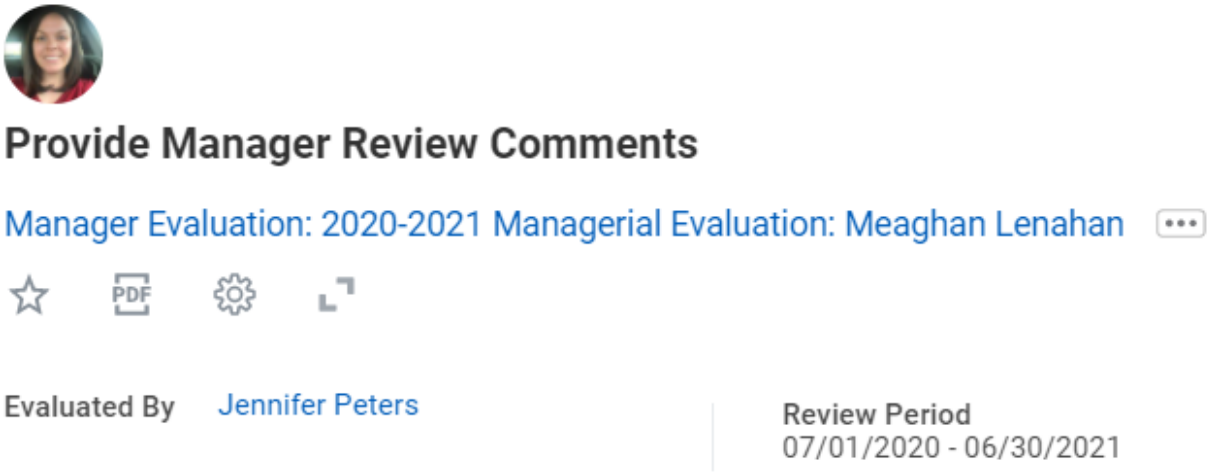
EVALUATION DELIVERY

["Provide Manager Review Comments" Step]

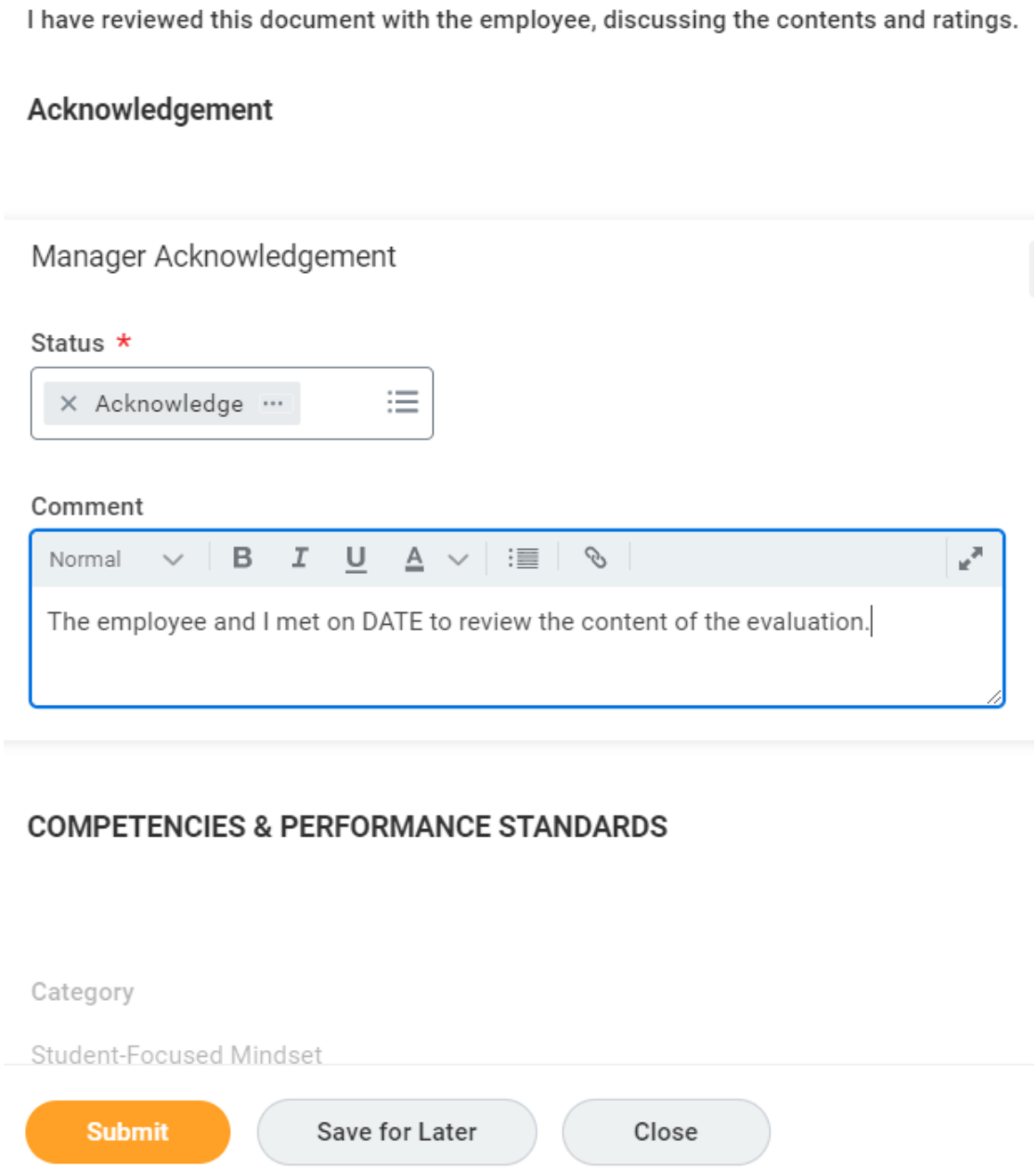
The immediate managerial supervisor will receive another inbox item to act on the evaluation once the required approvals have been recorded.



When clicking into the inbox item, supervisors will see that the step will be referred to in the system as "Provide Manager Review Comments." This step is intended to allow for the formal delivery of the evaluation to the employee.

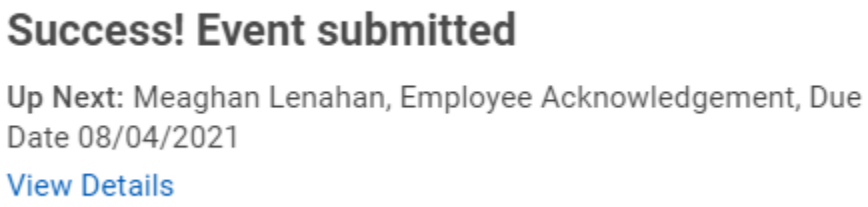


Supervisors should schedule time to review the evaluation with their direct report(s). Following this discussion, the supervisor should complete the acknowledgment within the system, indicating that the evaluation was delivered.



After completing the acknoweldgement, click Submit to move the evaluation forward to the employee.

Once submitted, a confirmation message will appear indicating that the evaluation has been routed to the employee for their acknowledgement. This is the immediate supervisor's final step of the review process and no further action is required once it has been submitted.



QUESTIONS OR CONCERNS?

For any questions regarding the evaluation process or for assistance with an evaluation in Workday, please contact Meaghan Lenahan (lenahanm@kean.edu).

Please refer to our Managerial Timeline on our Performance Management webpage for all deadlines and other important dates with respect to the completion of the Managerial Evaluation.

For other Workday resources, including additional training materials, visit our Workday webpage or email us at workday@kean.edu.