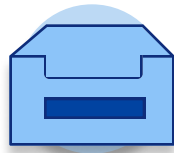




Managerial Evaluation Instructional
Guide for Employees
2020-2021



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

All Managerial Employees

Instructional Guide for Managerial Employees

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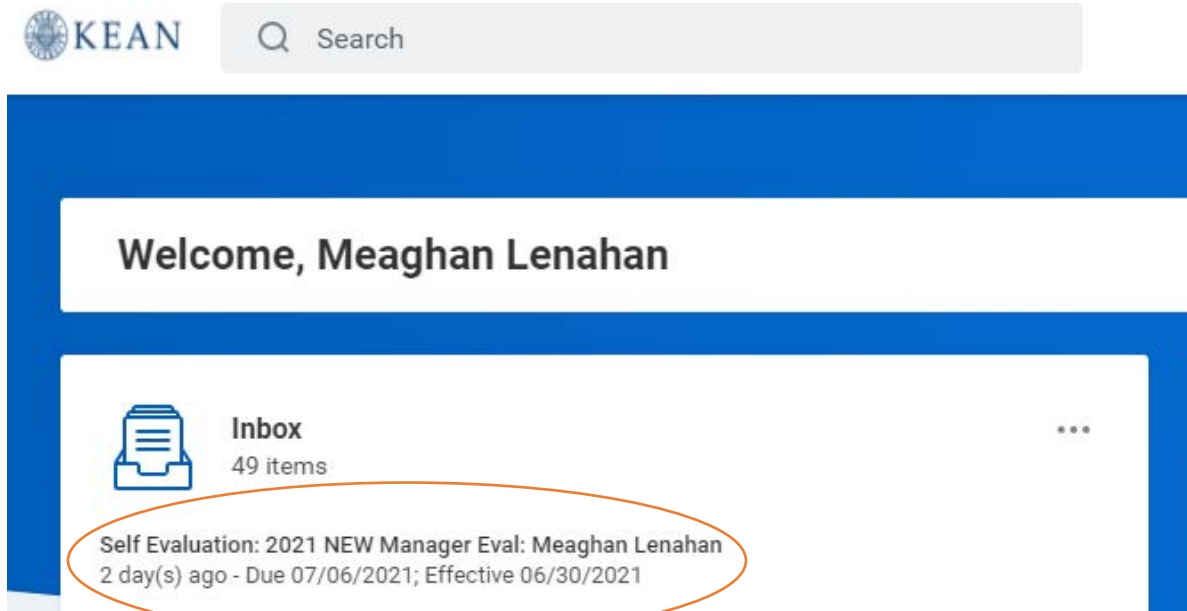
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EMPLOYEE SELF-EVALUATION

Once the evaluation has been launched by Human Resources, a Self-Evaluation task will appear in the employee's Workday inbox.

*Evaluations will be launched for **all** managers. Evaluations for should be completed for performance tracking purposes. Eligibility for compensation increases affiliated with the evaluation will be determined outside of the system.

**Managers who are on leave at the time evaluations are launched will have their evaluation in their Workday inbox awaiting action upon their return. Human Resources will work with employees who are on leave and their managers to ensure that evaluation expectations are met given each specific circumstance.




Inbox

Actions Archive

Viewing: All Sort By: Newest

Self Evaluation: 2021 NEW Manager Eval: Meaghan Lenahan
2 day(s) ago - Due 07/06/2021; Effective 06/30/2021

 **Complete Self Evaluation**
Self Evaluation: 2021 NEW Manager Eval: Meaghan Lenahan

2 day(s) ago - Due 07/06/2021; Effective 06/30/2021 Review Period: 07/01/2020 - 06/30/2021

Upon opening the task, the employee will be prompted with two view options: **Guided Editor** or **Summary Editor**.



Complete Self Evaluation

Self Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan ⋮

20 hour(s) ago - Due 06/24/2021; Effective 06/30/2021

Review Period
07/01/2020 - 06/30/2021

FOR EMPLOYEES:

Please complete the Self-Evaluation by choosing the rating that you believe best fits your managerial performance in each category listed below. Please note that this section is intended for self-reflection and advisement purposes only and will be shared with your supervisor as the full evaluation process is completed.

FOR SUPERVISORS:

Please select the rating that you deem is most appropriate for the managerial employee's performance in each of the following categories. Please include comments for your ratings in the summary box at the end of each section.

Note: Managers are at-will employees and the Performance Evaluation does not constitute a contract for continued employment. Rather the evaluation should be utilized for tracking & improving performance.



Go to Guided Editor

A simple step-by-step guide



Go to Summary Editor

Edit everything on one page

The **Guided Editor** view allows the system to guide 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 each task. When the user has completed all sections, they will be able to review in full prior to submission.

COMPETENCIES & PERFORMANCE STANDARDS ▾



Category

Student Focused Mindset

Description

Employee demonstrates a relentless focus on students; makes decisions with students in mind. If applicable, employee is sensitive and responsive to the current & future needs of the student.

Employee Evaluation

Rating ★




Complete Self Evaluation Self Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan ⋮

14 minute(s) ago - Due 06/22/2021; Effective 06/30/2021

Review Period
07/01/2020 - 06/30/2021

COMPETENCIES & PERFORMANCE STANDARDS

Category 

Student Focused Mindset

Description

Employee demonstrates a relentless focus on students; makes decisions with students in mind. If applicable, employee is sensitive and responsive to the current & future needs of the student.

Employee Evaluation

Rating ★

Summary Editor view allows the user to see all sections of the evaluation from one screen. The self-evaluation task will be completed by scrolling through each section from top to bottom. The user will click into each category to select their rating, and continue through each category on the same screen until all required responses have been entered. If at any point you want to exit Summary view and return to Guided view, you can click on the “Guide Me” button at the top of the screen.

COMPETENCIES & PERFORMANCE STANDARDS

[Guide Me](#)

Category ↶ ✓

Student Focused Mindset

Description
Employee demonstrates a relentless focus on students; makes decisions with students in mind. If applicable, employee is sensitive and responsive to the current & future needs of the student.

Employee Evaluation

Rating *

Category ✎

People Leadership for Supervisors

Description
Employee sets realistic expectations for staff. Provides timely, effective & meaningful feedback in order to motivate staff to improve performance. Appropriately delegates work & holds team members accountable. Employee has demonstrated the ability to build and support a high performing team.

Employee Evaluation

Category ✎

Job Knowledge

Description
Employee possesses requisite knowledge & understanding of assigned duties, responsibilities, policies, procedures & compliance requirements of the position. Employee understands business needs and desired outcomes.

Employee Evaluation

Rating *

Summary

Employee Evaluation ✎

Comment

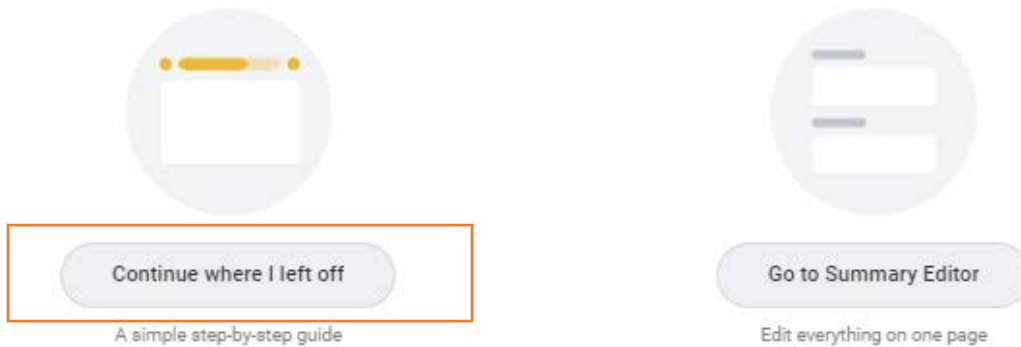
OUTCOMES & EXECUTION

[Guide Me](#)

Category ✎

Goal Setting & Achievement

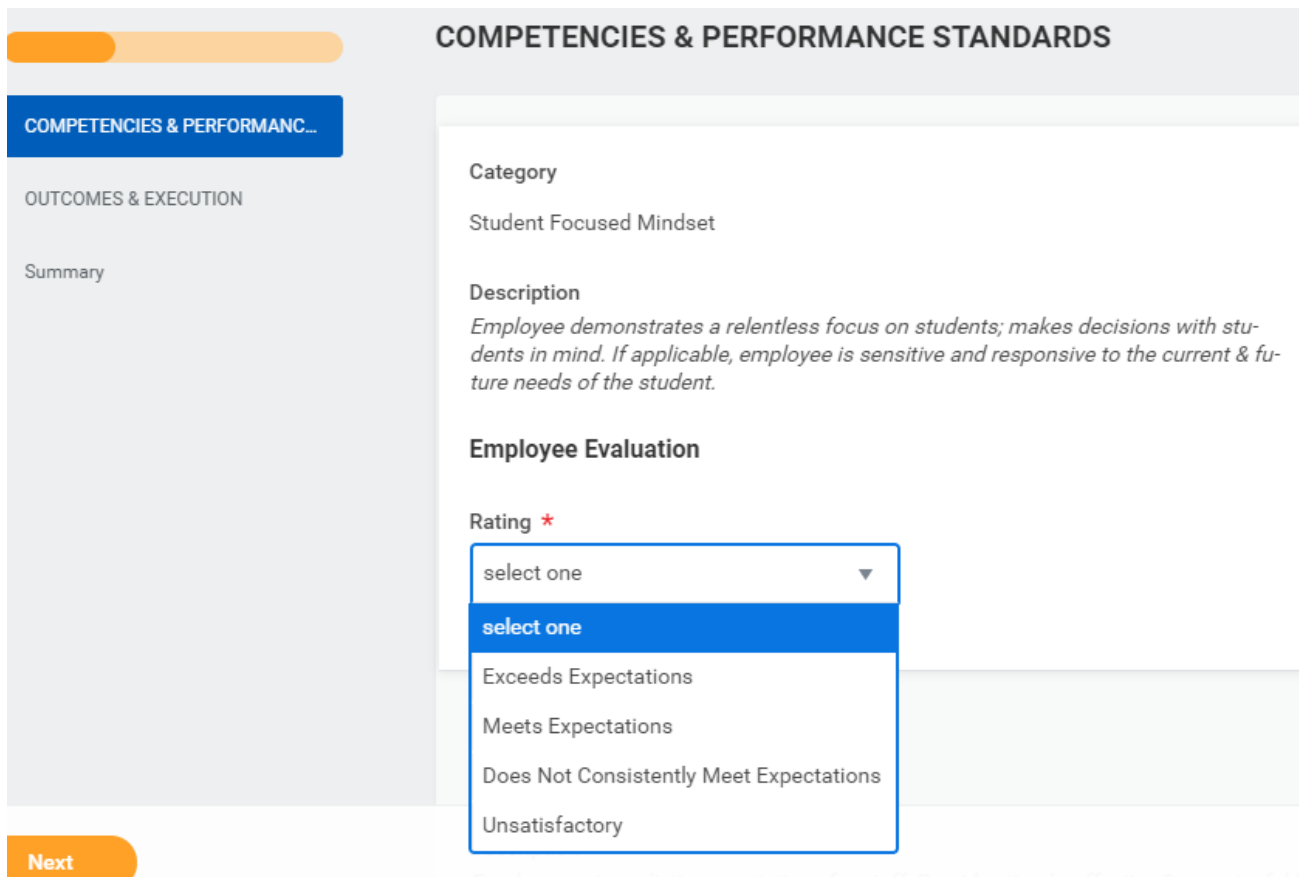
If the user initiates the evaluation task, and then exits the screen and returns to their Workday Inbox later, they will be prompted with the option to continue where they left off upon their return. A view of these options appears below.



Self-Evaluation Section One: *Competencies & Performance Standards*

*Note, screenshots of the self-evaluation below are shown using the **Guided Editor** view.

Employees will be required to respond to each category by clicking into the associated box to illuminate the section and selecting their rating from the drop down list provided.



Once you have selected a rating, it will populate the box. Proceed through the section, adding ratings for each category as you see fit.

The screenshot shows a form with two sections. The top section is titled 'Category' and contains the text 'Communication'. To the right of this section are two icons: a circular arrow and a checkmark. Below this is a 'Description' section with the text: 'Employee effectively gets their point across to others. Directives and instructions are clear & thorough. Written communications are accurate and crafted with the audience in mind. Employee listens attentively and clarifies information when necessary.' The next section is titled 'Employee Evaluation' and contains a 'Rating *' dropdown menu. The dropdown is currently set to 'Meets Expectations'. Below this is a second 'Category' section with the text 'Collaboration' and a pencil icon to its right.

In the **Summary area** of the page, add comments to accompany your ratings for the Competencies & Performance Standards section. Be sure to include specific comments or examples to support ratings such as Exceeds Expectations. Once a comment has been added, click **Next** to move forward in **Guided Editor** view.

The screenshot shows the 'Summary' section of the form. It has a title 'Summary' and a sub-section 'Employee Evaluation'. Below this is a 'Comment' section with a rich text editor. The editor has a toolbar with options for 'Normal', 'B' (bold), 'I' (italic), 'U' (underline), 'A' (text color), a list icon, a link icon, and a full-screen icon. The text entered in the comment box is: 'I believe I have met the expectations of my position in these categories over the past year.'

Self-Evaluation Section Two: *Outcomes & Execution*

Again, click into each category's box in order to illuminate it and select the rating of your choice.

COMPETENCIES & PERFORMANC...

OUTCOMES & EXECUTION

Summary

OUTCOMES & EXECUTION

Category
Goal Setting & Achievement

Description
Employee commits to challenging, yet realistic goals. Employee aggressively pursues goals. Employee sets realistic deadlines and meets them & produces high quality work which is accurate and thorough. Employee completes an acceptable quantity of work within established deadlines.

Employee Evaluation

Rating *

Meets Expectations ▼

Category
Innovations in Productivity & Fiscal Management

Description
Employee works with diligence & identifies opportunities to streamline or improve processes.

Employee Evaluation

Rating *

Meets Expectations ▼

select one

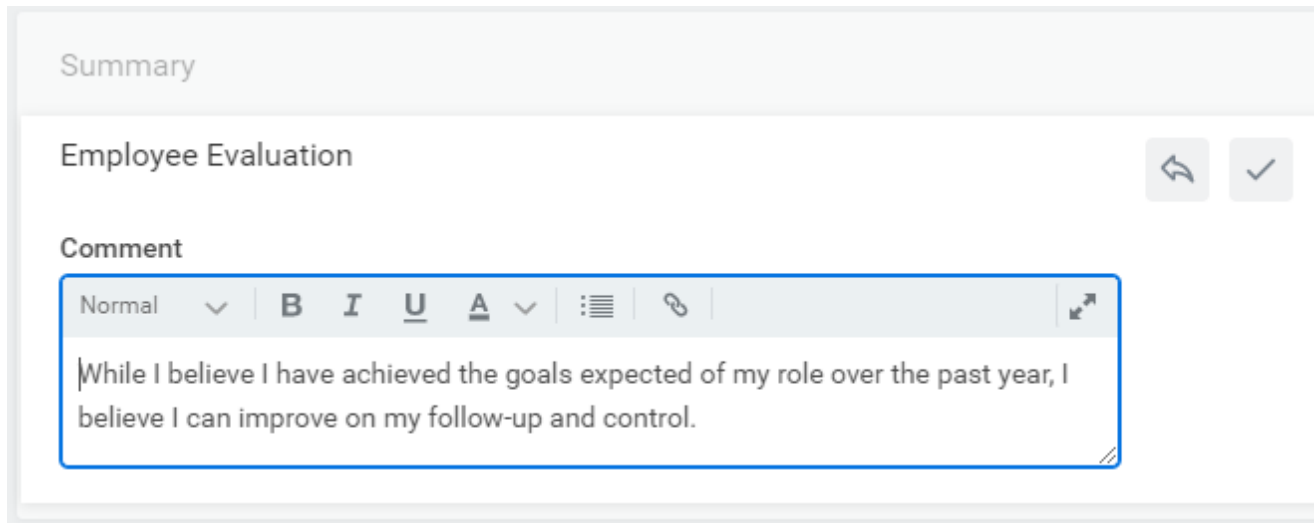
Exceeds Expectations

Meets Expectations



Does Not Consistently Meet Expectations

Unsatisfactory






In the **Summary** area, add comments to accompany and/or substantiate your ratings for the Outcomes & Execution categories. Once you have completed this section's ratings and added your comment(s), click **Next**.



Summary

Employee Evaluation  

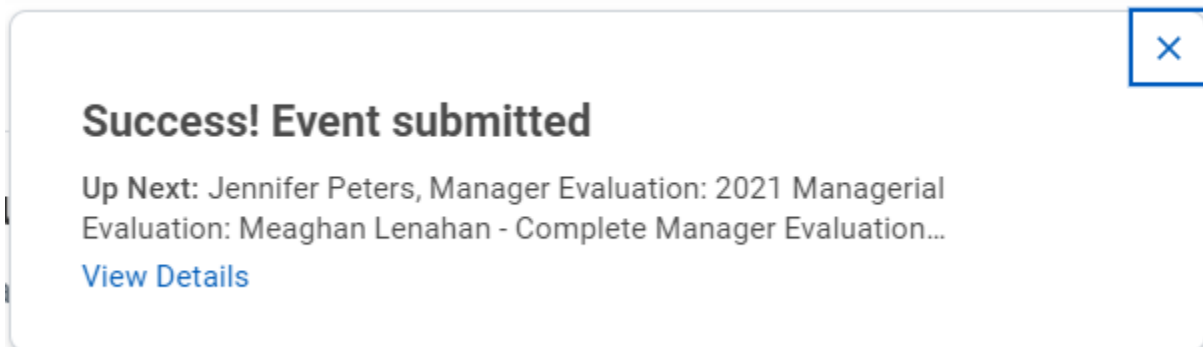
Comment


Normal  **B** *I* U A    

While I believe I have achieved the goals expected of my role over the past year, I believe I can improve on my follow-up and control.

After completing both sections, using **Guided Editor** will allow employees to have an opportunity to review the self-evaluation as a whole prior to submitting. If you would like additional time to consider your ratings and/or comments, you can **“Save for Later”** and return to the self-evaluation another time. If you have sufficiently completed the self-evaluation, you may click **Submit** to route it to your immediate managerial supervisor.

Once you have submitted, a confirmation message will display at the top of the page indicating that the evaluation has been moved forward to the next step. This confirmation message indicates the completion of the self-evaluation task.





Success! Event submitted

Up Next: Jennifer Peters, Manager Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan - Complete Manager Evaluation...

[View Details](#)

EMPLOYEE ACKNOWLEDGEMENT

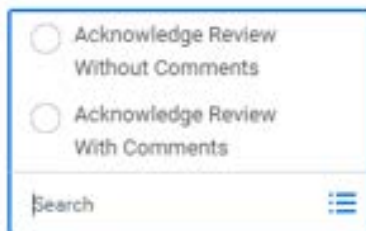
["PROVIDE EMPLOYEE REVIEW COMMENTS" STEP]

After the evaluation has been conducted by the immediate managerial supervisor and flowed through the approval chain, the evaluation will route back to the supervisor for delivery. The supervisor should meet with the employee to review and discuss the evaluation so that both users can complete their required acknowledgements.

Once the immediate supervisor has submitted their acknowledgment, the employee will receive an inbox item to review and acknowledge their evaluation within the system. This step is referred to as "Provide Employee Review Comments." The user will be able to choose to acknowledge the evaluation **with** or **without** comments. This choice may be made at the employee's discretion. Once the acknowledgment is complete, click **Submit**.

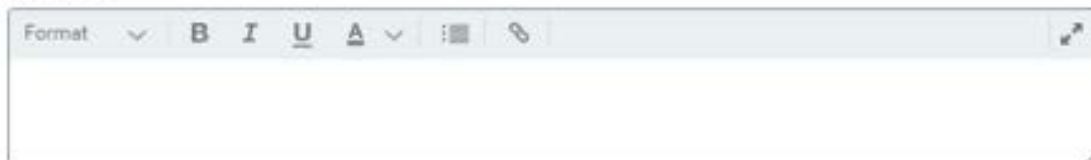
I acknowledge that my manager and I have reviewed and discussed the contents and ratings in this performance review.

Acknowledgement



A dropdown menu with two radio button options: "Acknowledge Review Without Comments" and "Acknowledge Review With Comments". Below the options is a search bar with the text "Search" and a hamburger menu icon.

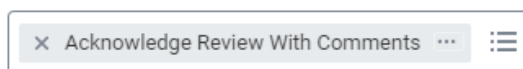
Comment



A rich text editor with a toolbar containing "Format", "B", "I", "U", "A", and icons for bulleted list, link, and unlink. The text area is empty.

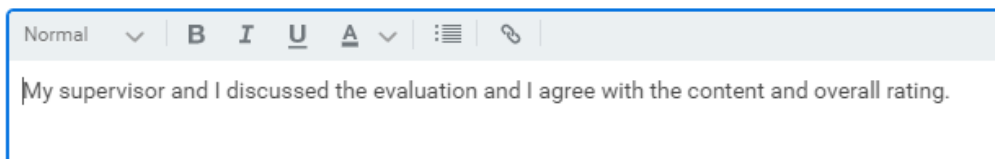
Employee Acknowledgement

Status *



A dropdown menu showing the selected status: "X Acknowledge Review With Comments" with a close button and a hamburger menu icon.

Comment



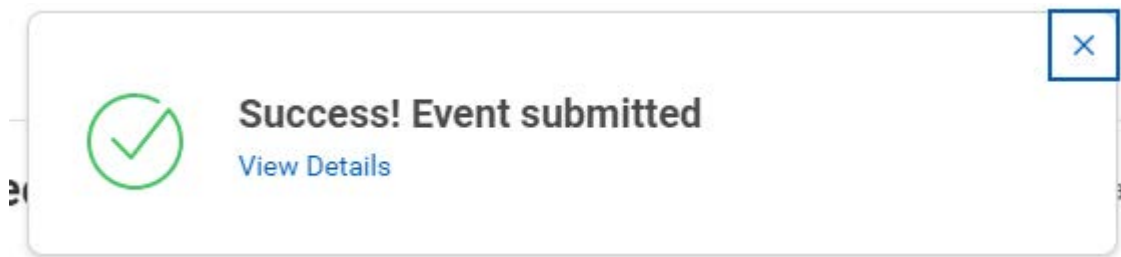
A rich text editor with a toolbar containing "Normal", "B", "I", "U", "A", and icons for bulleted list, link, and unlink. The text area contains the text: "My supervisor and I discussed the evaluation and I agree with the content and overall rating."

Submit

Save for Later

Close

After completing and submitting the Acknowledgement, the user will receive a final alert indicating that the overall evaluation event has been successfully completed.



This message indicates that the evaluation has been completed in full and will be recorded by the Office of Human Resources. No further action is required.

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) or Wonjun Han (wohan@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](#). You may send Workday specific questions to us at workday@kean.edu.