Managerial Evaluation Instructional Guide for Employees

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

All Managerial Employees
Instructional Guide for Managerial Employees

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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 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.
Upon opening the task, the employee will be prompted with two view options: Guided Editor or Summary Editor. Please refer to the following pages for the detailed offerings of each view.

The Guided Editor guides the user through the evaluation. Each section is 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 the evaluation in full prior to submission.
Click on the arrows in the top right of the evaluation screen in order to enlarge your view. In expanding the page, you will see that the Guided Editor view has broken the evaluation out into separate sections.
Summary Editor view allows you 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.

**Complete Self Evaluation**  
Self Evaluation: 2020-2021  
Managerial Evaluation: Meaghan Lenahan

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student-Focused Mindset</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Employee demonstrates a relentless focus on students; makes decisions with students in mind. If applicable, employee is sensitive and responsive to the current and future needs of the student.</td>
<td></td>
</tr>
<tr>
<td>Employee Evaluation</td>
<td></td>
</tr>
<tr>
<td>People Leadership for Supervisors</td>
<td></td>
</tr>
</tbody>
</table>
*If you initiate the evaluation task, exit the screen and return to your Workday inbox later, you will be prompted with the option to continue where they left. See below image for reference.

Self-Evaluation Section One: Competencies & Performance Standards
Note: Images of the Self-Evaluation below are shown using the Guided Editor view in full screen.

Employees will be required to respond to each category by clicking into the associated box to illuminate the section and selecting the appropriate rating from the drop down list provided.
Once you have selected a rating, it will populate in the box. Proceed through the section, adding ratings for each category.

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

**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

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**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

Does Not Consistently Meet Expectations

Unsatisfactory
In the Summary box, add comments to accompany your ratings for the Outcomes & Execution categories. Once you have completed this section’s ratings and added your comments, click Next to continue.

**Summary**

**Employee Evaluation**

Comment
While I believe I have achieved the goals of my position, I believe I can improve on my follow-up and control.

After completing both sections using Guided Editor view, employees will have an opportunity to review the Self-Evaluation in full 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.

After sufficiently completing all sections of the Self-Evaluation, you may click Submit to route the evaluation to your immediate managerial supervisor.

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.
EMPLOYEE ACKNOWLEDGEMENT
[“PROVIDE EMPLOYEE REVIEW COMMENTS” STEP]

After the evaluation has been completed 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 acknowledgement steps in Workday.

Once your immediate supervisor has submitted their acknowledgment, you will receive an Employee Acknowledgement inbox item.

When opening the inbox item, the step will be referred to as the “Provide Employee Review Comments” step.

Provide Employee Review Comments

Manager Evaluation: 2020-2021 Managerial Evaluation: Meaghan Lenahan

Evaluated By Jennifer Peters

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

7 minute(s) ago - Due 08/04/2021; Effective 06/30/2021

I acknowledge that my manager and I have reviewed and discussed the contents and ratings in this performance review.
You will be able to choose to acknowledge the evaluation **with** or **without** comments. This choice is made at your discretion. After completing the **Employee Acknowledgement**, click **Submit**.

**Employee Acknowledgement**

**Status ✓**

- Acknowledge Review Without Comments
- Acknowledge Review With Comments

**Acknowledgement**

**Employee Acknowledgement**

**Status ✓**

- Acknowledge Review With Comments

**Comment**

> My manager and I have discussed the evaluation and I agree with its contents.

**COMPETENCIES & PERFORMANCE STANDARDS**

- **Submit**
- **Save for Later**
- **Close**
After completing and submitting the Employee Acknowledgement, you will receive a final alert indicating that the overall evaluation event has been successfully completed. 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).

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.