Managerial Evaluation Instructional Guide for Managers & Next Level Supervisors 2020-2021

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.

Upon clicking into the evaluation task, the user will be presented with two view options: Guided Editor and Summary Editor. *Note that this guide includes images using the Guided Editor view.

**Guided Editor** 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 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 through from top to bottom until all required sections have been completed.

**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.
Manager Evaluation Section One: Competencies & Performance Standards
Users will be able to click into the box for each category to select their rating on the employee’s performance. The employee’s self-evaluation ratings will be available for your review to the right of your Manager Rating. Self-Evaluation ratings are informational, and while they can be considered, they do not need to influence the supervisor’s rating(s).

Once the user has chosen a rating from the drop down list, it will display in the box opposite the employee’s self-evaluation rating.

Category
Communication

Description
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.

Manager Evaluation
Manager Rating *
Meets Expectations
In the Summary area for the Competencies & Performance Standards section, you should add comments to accompany your ratings. Note that comments are required for each section, and specific comments/examples are encouraged for ratings other than “Meets Expectations.”

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 second section. **Note that comments are required for each section, and specific comments/examples are encouraged for ratings other than “Meets Expectations.”**

<table>
<thead>
<tr>
<th>Manager Evaluation</th>
<th>Employee Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comment</strong></td>
<td><strong>Comment</strong></td>
</tr>
<tr>
<td>The employee has achieved the goals set for this year and in some cases has exceeded expectations. Their successful completion of a major project in the fourth quarter is of note for this evaluation period.</td>
<td>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.</td>
</tr>
</tbody>
</table>

After all ratings have been entered, 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. Users may review the overall rating and click **Next** to move forward.
When in Guided Editor view, users will have the option to review the evaluation as a whole before submitting the evaluation for approval.

Ultimately, the supervisor will be presented with the option to Submit the evaluation, but they may also select one of the other options as well. Please refer to the below explanations to understand what action will result from your selection.

If you **Submit**, the evaluation will move to the Approval Chain step of the evaluation’s business 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. *This would not be 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 evaluation has been submitted, you will receive an alert indicating that the evaluation has moved to the next step- Approval Chain by VP/Executive Approver.

**Important Notes**

- The evaluation will route to the employee’s current immediate manager. For any errors in reporting structure, please contact 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 following 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 HR 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 areas 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 the Managerial Evaluation Calendar which is accessible from the Performance Management page of the Human Resources website. All evaluation steps should be completed in accordance with the Evaluation timeline.
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 business process, the evaluation will route to the appropriate individual(s) in the management chain for approval, appearing as an Approval task in the next-level management’s Workday inbox. The evaluation will be available in its entirety to the next-level approver, including both the employee’s self-evaluation and the manager’s ratings and comments.
Users within the Approval Chain will have the option to Approve, Send Back, or Close.

If you Approve, the evaluation will route to the next level in the management chain for final approval, if applicable, or it will return to the Manager so it can be delivered to the employee.

If you Send Back, you may return the evaluation to the employee or the immediate supervisor with a comment for further action or discussion. Specific details on the Send Back function follow.

If you Close, you will exit out of this inbox item and may return at a later date.

“Send Back” functionality
As the evaluation is an interactive process, the system allows the approval chain to send the evaluation back to another user for further action. The approval chain will not have the ability to edit the evaluation directly, however, if they wish to call attention to a significant event that impacted the employee over the evaluation period, or if they have questions about a particular rating, they may elect to use the Send Back function.

Note that in the case of the approval chain, 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.

Sending the evaluation back will return it to the user of choice. The sender will be also required to add a comment indicating the reason for sending the evaluation back. The evaluation will then route within the system to the selected user for the appropriate action before returning to the approval chain.
Each user within the Approval Chain must Approve the evaluation in order to move it forward to the fourth step, Manager Acknowledgement ("Provide Manager Review Comments").

After all required approvals have been obtained, the evaluation will return to the immediate supervisor for delivery to the employee.

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 business process.

Success! Event approved

Up Next: Jennifer Peters, Provide Manager Review Comments, Due Date 06/25/2021
View Details
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. This step will be referred to in the system as “Provide Manager Review Comments.”

The manager’s acknowledgment step is intended to allow for the formal delivery of the evaluation to the employee. Supervisors are encouraged to meet with their direct report to review and discuss the evaluation. Following this discussion, the manager should complete the acknowledgment within the system, indicating for the record that the evaluation was delivered.

Provide Manager Review Comments
Manager Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan

Evaluated By
Jennifer Peters

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

I have reviewed and approved this document with the employee, discussing the contents and overall rating.

Acknowledgement

Manager Acknowledgement

Status
Search
Acknowledged

Comment

Manager Acknowledgement

Status

Acknowledged

Comment
Employee and I met on DATE to discuss the content of the evaluation.
After the acknowledgment step has been completed, the manager will receive a confirmation message indicating that the evaluation has been routed to the employee to collect their acknowledgement within the system. 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) 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.