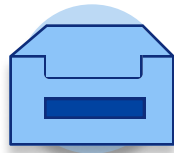




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Managerial Evaluation Instructional Guide  
for Managers & Next Level Supervisors  
2020-2021



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

Managerial Supervisors and  
Senior Management

# Instructional Guide for Supervisors & Next Level Management

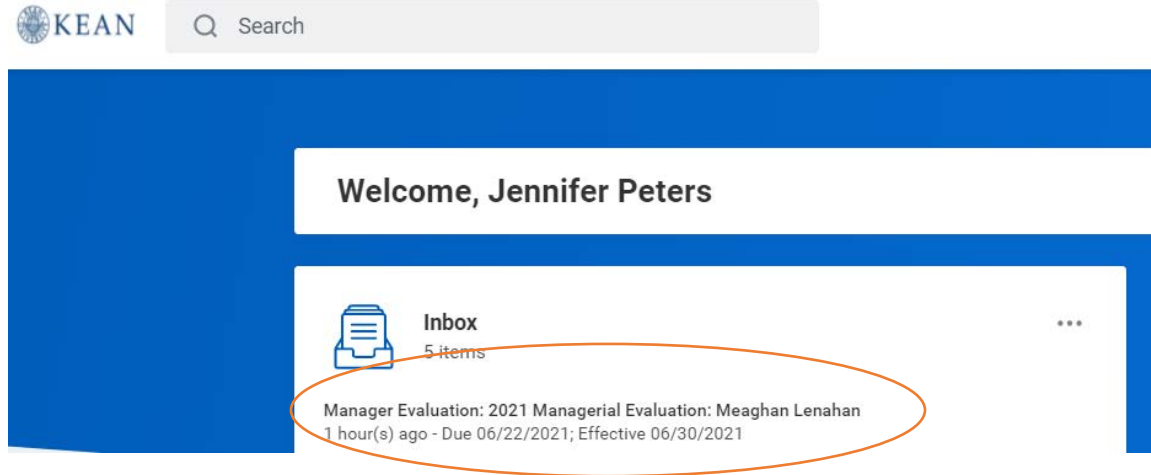
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# IMMEDIATE MANAGERIAL SUPERVISOR'S EVALUATION

## ["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.

A screenshot of the 'Complete Manager Evaluation' task page. At the top left is a profile picture of a woman. The title is 'Complete Manager Evaluation' followed by a breadcrumb 'Manager Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan'. On the right are icons for star, list, PDF, and settings. Below the title is the text '1 hour(s) ago - Due 06/22/2021; Effective 06/30/2021' and 'Review Period 07/01/2020 - 06/30/2021'. The main content area has two sections: 'FOR EMPLOYEES:' with instructions to complete self-evaluation, and 'FOR SUPERVISORS:' with instructions to select ratings and include comments. A note at the bottom states: '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 &amp; improving performance.' At the bottom of the page are two large buttons: 'Go to Guided Editor' with a calendar icon and the text 'A simple step-by-step guide', and 'Go to Summary Editor' with a document icon and the text 'Edit everything on one page'.

## 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).

The screenshot shows a web interface titled "COMPETENCIES & PERFORMANCE STANDARDS". On the left is a sidebar with a blue header "COMPETENCIES & PERFORMANC..." and menu items: "OUTCOMES & EXECUTION", "Overall", and "Summary". The main content area displays a category "Student Focused Mindset" with a 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." Below this are two columns: "Manager Evaluation" and "Employee Evaluation". Under "Manager Evaluation", there is a "Manager Rating" dropdown menu with a red asterisk. The dropdown is open, showing options: "Meets Expectations" (selected), "select one", "Exceeds Expectations", "Does Not Consistently Meet Expectations", and "Unsatisfactory". Under "Employee Evaluation", the "Employee Rating" is "Meets Expectations".

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.

This screenshot shows the same interface as above, but with the "Manager Rating" dropdown menu closed. The selected rating "Meets Expectations" is now visible in the dropdown box. The "Employee Rating" is now "Exceeds Expectations". In the top right corner, there are two icons: a back arrow and a checkmark.

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.”**

### Summary

Manager Evaluation	Employee Evaluation
<p><b>Comment</b></p> <div style="border: 1px solid blue; padding: 5px;"><p>Normal <span>▼</span></p><p><b>B</b> <i>I</i> <u>U</u> <b>A</b> <span>▼</span> <span>☰</span></p><p><a href="#">Link</a></p><p>The employee has been successful in the position but can work to expand their job knowledge as they have recently taken on additional duties.</p></div>	<p><b>Comment</b></p> <p>I believe I have met the expectations of my position in these categories over the past year.</p>

### Manager Evaluation Section Two: *Outcomes & Execution*

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

OUTCOMES & EXECUTION ▼

◀  ▶

<p>Category</p> <p>Goal Setting &amp; Achievement</p> <p>Description</p> <p><i>Employee commits to challenging, yet realistic goals. Employee aggressively pursues goals. Employee sets realistic deadlines and meets them &amp; produces high quality work which is accurate and thorough. Employee completes an acceptable quantity of work within established deadlines.</i></p>	<p><b>Manager Evaluation</b></p> <p>Manager Rating * <span style="color: red;">*</span></p> <p><span style="border: 1px solid #ccc; padding: 2px;">select one</span> <span>▼</span></p>	<p><b>Employee Evaluation</b></p> <p>Employee Rating</p> <p>Meets Expectations</p>
<p>Category</p> <p>Problem Solving &amp; Agility</p> <p>Description</p> <p><i>Employee has demonstrated the ability to consider solutions to problems. Employee develops sustainable solutions and executes. Employee thinks proactively and is open to change.</i></p>	<p><b>Manager Evaluation</b></p> <p>Manager Rating * <span style="color: red;">*</span></p> <p><span style="background-color: #f4a460; border-radius: 10px; padding: 5px 15px;">Next</span></p>	<p><b>Employee Evaluation</b></p> <p>Employee Rating</p> <p>Exceeds Expectations</p>

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.”**

Summary

Manager Evaluation

Employee Evaluation

Comment

Normal

**B** **I** **U** **A** | |

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

Comment

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 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.

Overall

COMPETENCIES & PERFORMANC...

OUTCOMES & EXECUTION

Overall

Summary

**Manager Evaluation**

Rating

Meets Expectations

Back

Next

When in **Guided Editor view**, users will have the option to review the evaluation as a whole before submitting the evaluation for approval.

The screenshot shows two evaluation cards in a list. Each card has the following structure:

- Category:** Student Focused Mindset (top card) / People Leadership for Supervisors (bottom card)
- 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. (top card) / 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. (bottom card)
- Manager Evaluation:** Meets Expectations
- Manager Rating:** \* (indicated by a red asterisk)
- Employee Evaluation:** Meets Expectations
- Employee Rating:** Meets Expectations

At the bottom of the interface, there are four buttons: **Submit** (highlighted in orange), **Send Back**, **Save for Later**, and **Close**.

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.



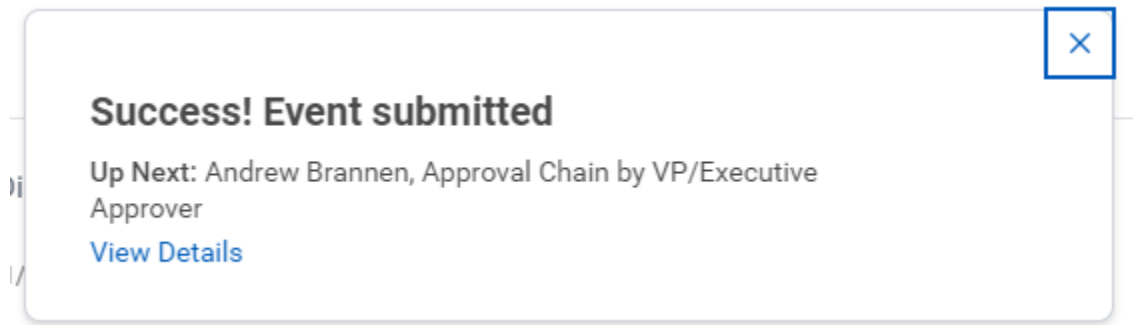
If you **Submit**, the evaluation will move to the Approval Chain step of the evaluation’s business process. This means the evaluation will route to the appropriate next level for approval, including a Vice President or Senior Vice President, if applicable.

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](mailto: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.



## 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 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.

**Welcome, Andrew Brannen**

 **Inbox**  
15 items

Manager Evaluation: 2021 NEW Manager Eval: Meaghan Lenahan  
2 minute(s) ago - Effective 06/30/2021

 **Review**

Manager Evaluation: 2021 Managerial Evaluation: Meaghan Lenahan ⋮

Evaluated By  
[Jennifer Peters](#)

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 sen*

Manager Evaluation

Employee Evaluation

Manager Rating

Employee Rating

Meets Expectations

Meets Expectations

Approve

Send Back

Close

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.

**Send Back**

To \*

Reason \*

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 


Acknowledge

Comment






Format  **B** *I* U **A**    

Manager Acknowledgement

Status \*

Acknowledge 

Comment

Normal  **B** *I* U **A**    

Employee and I met on DATE to discuss the content of the evaluation.

After the acknowledgement 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.

## Success! Event submitted

Up Next: Meaghan Lenahan, Provide Employee Review  
Comments, Due Date 06/25/2021

[View Details](#)

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## 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](mailto:lenahanm@kean.edu)) or Wonjun Han ([wohan@kean.edu](mailto: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](mailto:workday@kean.edu).