



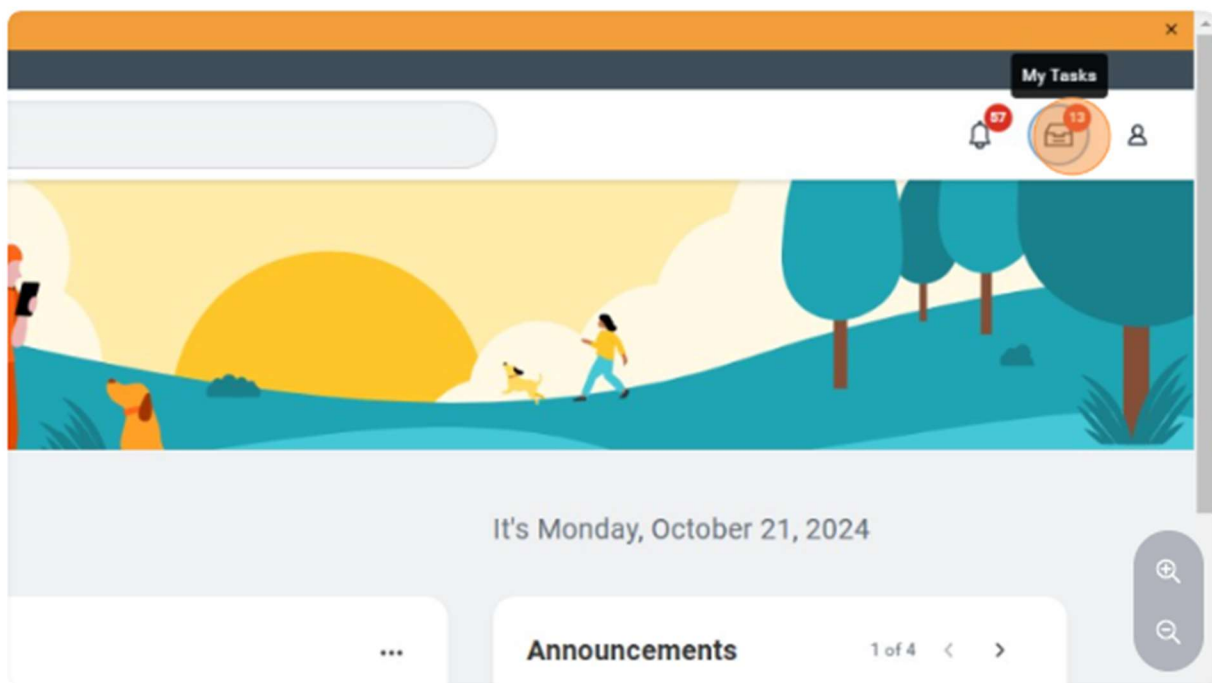
## How To Approve a Performance Review in Workday

Stephanie Tschohl | 9 steps | 55 seconds



- 1 Navigate to your Workday Homepage.

- 2 Click on your inbox.



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Click on the "Manager Evaluation: Salaried Performance Review - Operations: [Name]" task to open it.

The screenshot shows a task management application. On the left is a sidebar with a search bar and a list of tasks. The main area displays a list of tasks under the heading "All Items". One task is selected and highlighted in blue. To the right of the task list is a detailed view of the selected task.

**Task List:**

- Manager Evaluation: Salaried Performance Review - Operations: [Name] (10/21/2024)
- Manager Evaluation: Salaried Performance Review - Operations: [Name] (10/21/2024)

**Task Details:**

- Task Name:** Manager Evaluation: Salaried Performance Review - Operations: [Name]
- Effective:** 12/31/2024
- Due:** 10/28/2024
- Effective:** 12/31/2024

**Review Details:**

- Reviewed By:** Stephanie Tschohl (025)
- Review Period:** 01/01/2024 - 12/31/2024

Please utilize the [attached resources](#) as team members. A few considerations to keep in mind:

- State the facts, use examples/data as needed
- Use the essential functions of the job description to rate performance – consult [estservices.com](#) if you need a copy of a job description
- Consult last year's review, if applicable, to determine if goals were met/exceeded
- Avoid discriminatory language or any reference to protected class such as race, gender, age, etc.

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Click "Get Started"

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- Manager Evaluation: Salaried Performance Review - Operations: [Name] (10/21/2024)
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**Review Details:**

- Reviewed By:** Stephanie Tschohl (025)
- Review Period:** 01/01/2024 - 12/31/2024

Please utilize the [attached resources](#) as you are writing your performance review for team members. A few considerations to keep in mind:

- State the facts, use examples/data as needed
- Use the essential functions of the job description to rate performance – consult [estservices.com](#) if you need a copy of a job description
- Consult last year's review, if applicable, to determine if goals were met/exceeded
- Avoid discriminatory language or any reference to protected class such as race, gender, age, etc.

For more information on writing and delivering effective performance reviews, listen to the [Performance Reviews](#) (approx. 30 minutes) podcast.

Please contact the Employee Experience Manager or the Senior Director of Human Resources for assistance, questions, or concerns regarding writing and delivering performance reviews.

**Get Started**

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The review will auto open to the "Summary" section. Review all competency ratings and narrative comments as well as overall Job Summary.

The screenshot displays the 'Guest Services' Manager Evaluation interface. The left sidebar contains a navigation menu with the following items: Review, Manager Evaluation: Salaried, Performance Review - Operation, Actions, 01/01/2024 - 12/31/2024, Evaluated By: [User Icon], Competencies, Narrative Section, Job Performance Summary, Overall, and Summary. The 'Summary' item is highlighted with an orange circle. The main content area is titled 'Competencies' and shows a table with 8 items. The table has three columns: Competency, Description, and Manager Evaluation. The rows are: Attendance, Client Relations, Communication, and Customer Service. Each row has a 'Rating' and 'Meets Expectations' status, and a 'Comment' field. At the bottom of the table, there are 'Approve' and 'Send Back' buttons. The interface also includes a search bar at the top, a menu icon, and a user profile icon.

Competency	Description	Manager Evaluation
Attendance	Measures attendance and punctuality. Reports to work as scheduled and follows call-in and approval procedures for time off. Requests and uses leave appropriately.	Rating Meets Expectations Comment Comments
Client Relations	Communicates effectively with the client and is proactive in anticipating the needs or requirements of the client. Able to solve issues without having to "go up a level" in the process.	Rating Meets Expectations Comment Comments
Communication	Expresses ideas and information accurately and clearly in both oral and written form. Communicates effectively with customers, employees, supervisors, corporate support staff, and peers.	Rating Meets Expectations Comment
Customer Service	Exhibits high level service standards with internal customers and external contacts. Effectively responds to customer needs. Sets an example of exceptional customer service for our employees, clients, and guests.	Rating Meets Expectations Comment

- 6 If you do not approve and need your direct report to make changes, Click "Send Back"

in

Summary

**Manager**

Calculated Rating Meets Expectations (Rounded from 3)

Rating Meets Expectations

**Process History**

Due 10/28/2024

Complete Manager Evaluation for Performance Review- Submitted

Approval by Manager's Manager- Awaiting Action

Approve Send Back

- 7 Click the "Reason" field.

Overall

Manager

Calculated Rating

Rating

**Send Back**

To \* Complete Manager Evaluation for Performance Review

Reason \*

Submit Cancel

- 8 Type send back notes in the reason section and click submit.

The screenshot shows a 'Send Back' modal window. The modal has a title 'Send Back'. It contains a 'To' field with a dropdown menu showing 'Complete Manager Evaluation for Performance Review'. Below this is a 'Reason' field with a red asterisk and the placeholder text 'Send back notes here'. At the bottom of the modal are two buttons: 'Submit' (highlighted with an orange circle) and 'Cancel'. The background shows a performance review interface with sections like 'Overall', 'Manager', 'Calculated Rating', 'Rating', and 'Process History'. The 'Process History' section shows a timeline with a red circle icon and the text 'Complete Manager Evaluation for Performance Review- Submitted' and a blue circle icon with the text 'Approval by Manager's Manager- Awaiting Action'. A due date 'Due 10/28/2024' is visible.

- 9 If no changes are needed, click "approve". It will now go to HR for final approval.

The screenshot shows the performance review interface. On the left is a sidebar with a vertical list of sections: 'Narrative Section', 'Job Performance Summary', 'Overall', and 'Summary' (highlighted with a blue circle). The main content area has a 'Manager' section with 'Calculated Rating' (Meets Expectations (Rounded from 3)) and 'Rating' (Meets Expectations). Below this is a 'Process History' section with a timeline showing a red circle icon and the text 'Complete Manager Evaluation for Performance Review- Submitted' and a blue circle icon with the text 'Approval by Manager's Manager- Awaiting Action'. A due date 'Due 10/28/2024' is visible. At the bottom of the main content area are two buttons: 'Approve' (highlighted with an orange circle) and 'Send Back'. On the right side of the interface are two magnifying glass icons.