



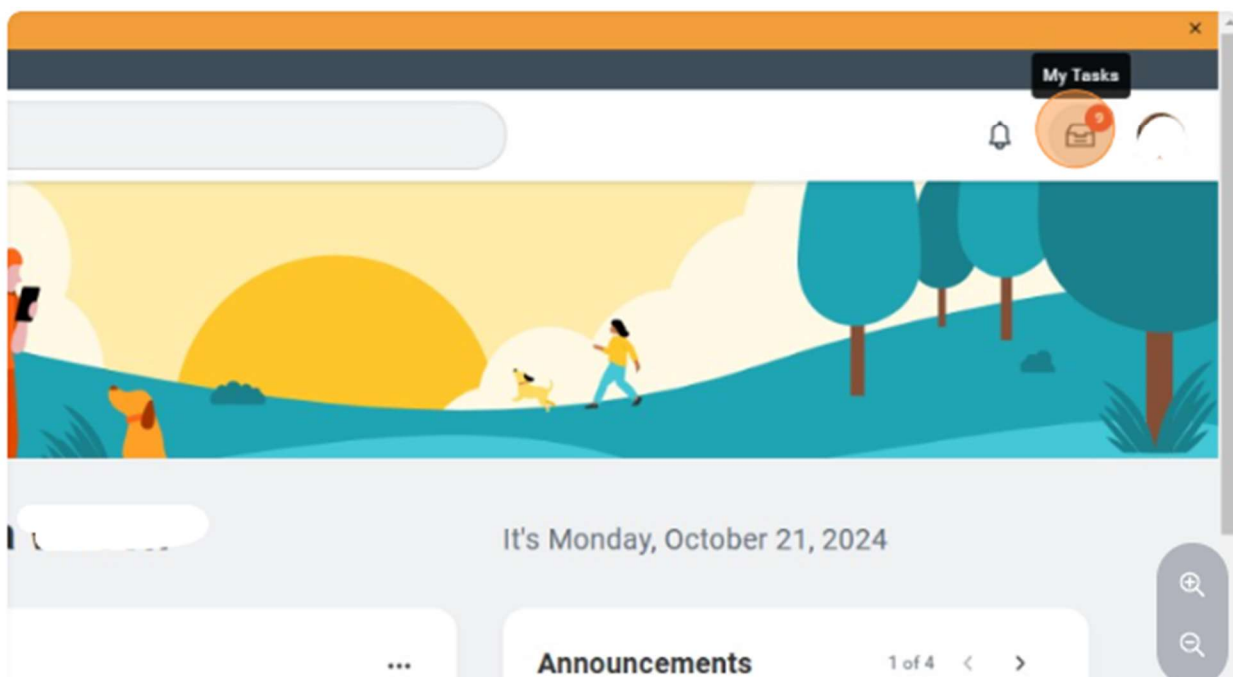
How To Submit Employee Performance Review in Workday & How To Acknowledge a Performance Review in Workday

Stephanie Tschohl | 17 steps | 2 minutes



1 Navigate to your Workday homepage.

2 Click on your inbox.



- 3 Click "Employee Review Hold Step: Manager Evaluation: Salaried Performance Review - Operations: [Name]" to open the task.

My Tasks

All Items

Search: All Items

Advanced Search

Employee Review Hold Step: Manager Evaluation: Salaried Performance Review - Operations: 10/21/2024

Effective: 12/31/2024

Manager Evaluation: Salaried Performance Review - Operations: 10/21/2024

Due: 10/28/2024

Effective: 12/31/2024

Complete To Do

For

Overall Process Salaried Performance Review - Operations: Andrea Castro (029578)

Overall Status In Progress

Due Date 11/04/2024

Instructions WAIT! Do not submit this step until you have discussed the review with your employee.

- 4 This is a HOLD STEP. Do not click Submit until you've delivered the review in person (or via phone or Teams) to your direct report.

Instructions

WAIT!

Do not submit this step until you have discussed the review with your employee.

1 item

File Name	Type	File	Created by	Date Created
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- 5 Click the link under File Name to open a printable PDF to present to your direct report.

Due Date 11/09/2024

Evaluation: Salaried
Performance Review - Operations: 10/21/2024 ☆

11/09/2024

11/09/2024

Instructions **WAIT!**

Do not submit this step until you have discussed the review with your employee.

1 item

File Name	Type	File	Created by
Employee Review Printout - Performance Review - Operations 10_21_2024.pdf ...	Business Form (PDF)		Rhonda Wilson

... Save for Later

- 6 Once you present the performance evaluation to your team member, follow steps 1-4 to navigate back to the HOLD STEP task. Click "Submit".

11/09/2024 ☆

Do not submit this step until you have discussed the review with your employee.

1 item

File Name	Type	File	Created by	Date Created
Employee Review Printout - Salaried Performance Review - Operations 10_21_2024.pdf	Business Form (PDF)			10/21/2024 09:39

7

A secondary HOLD STEP will appear in your inbox. Click the task title to open the task. Please note: "SUBMITTING THIS STEP WILL RELEASE THE REVIEW TO THE EMPLOYEE FOR REVIEW"

The screenshot shows a task card with a left sidebar containing three items, each with a date '1/2024' and a star icon. The main area of the card displays the following information:

- For:** Andrea Castro (029578)
- Overall Process:** Salaried Performance Review - Operations: [View Details](#)
- Overall Status:** In Progress
- Due Date:** 11/04/2024
- Instructions:** SUBMITTING THIS STEP WILL RELEASE THE REVIEW TO THE EMPLOYEE FOR REVIEW

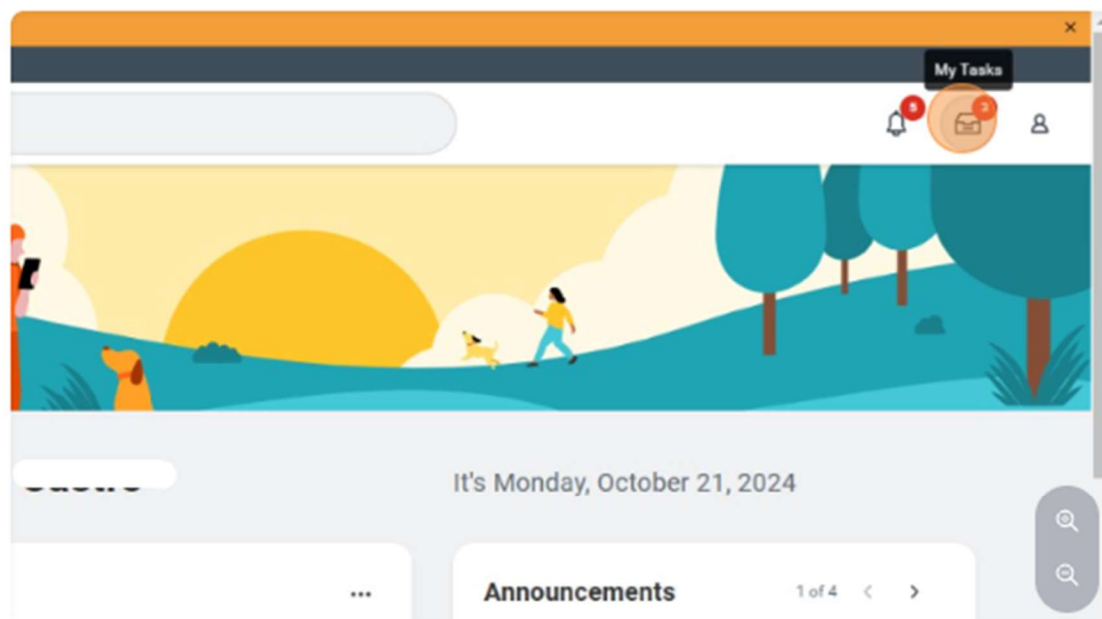
An orange circle highlights the word 'WILL' in the instructions. At the bottom right, there is a vertical toolbar with two magnifying glass icons.

8

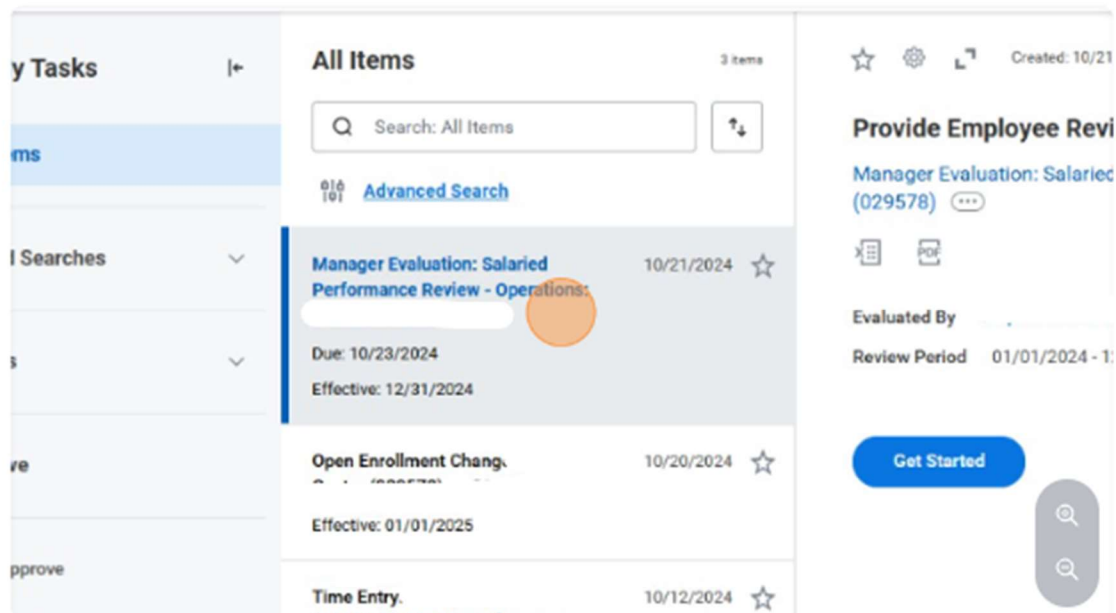
Once you are ready for your team member to view and acknowledge the review in the system, Click "Submit"

The screenshot shows the bottom portion of the task card, with the word 'REVIEW' centered at the top of the main area. The left sidebar remains the same. At the bottom, there is a horizontal bar containing three elements: a three-dot menu icon, a 'Save for Later' button, and a 'Submit' button. The 'Submit' button is highlighted with an orange circle. A vertical toolbar with two magnifying glass icons is located on the right side.

- 9 To acknowledge the performance evaluation, your team member will navigate to their Workday homepage and click on their inbox. Please share the following instructions with your team members.



- 10 Click "Manager Evaluation: Salaried Performance Review - Operations: [name]" to open the task.



11 Click "Get Started"

[Advanced Search](#)

Manager Evaluation: Salaried Performance Review - Operations: 10/21/2024 ☆

10/21/2024

12/31/2024

Document Change 10/20/2024 ☆

on 01/01/2025

1/01/2025

10/12/2024 ☆

39.5 Hours from 10/14 to 10/18/2024

10/24

10/11/2024

Manager Evaluation: Salaried Performance Review - Operations:

...

...

...

Evaluated By

Review Period 01/01/2024 - 12/31/2024

Get Started

12 The system will pull up the performance evaluation summary. Team members can review all sections of the performance review: Competencies, Narrative Section, Summary, etc.

MENU

QUEST SERVICES

Search

Provide Employee Review | Comments

Manager Evaluation: Salaried Performance Review - Operations: 01/01/2024 - 12/31/2024

Evaluated By

Summary

Acknowledgement

Summary

Competencies

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: Comments
Customer Service	Exhibits high level service standards.	Rating: Meets Expectations Comment: Comments

13 Click "Next"

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Back Next Close

Search

14 Click the "Status" field.

ES Search

Employee Review

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Acknowledgement

Employee

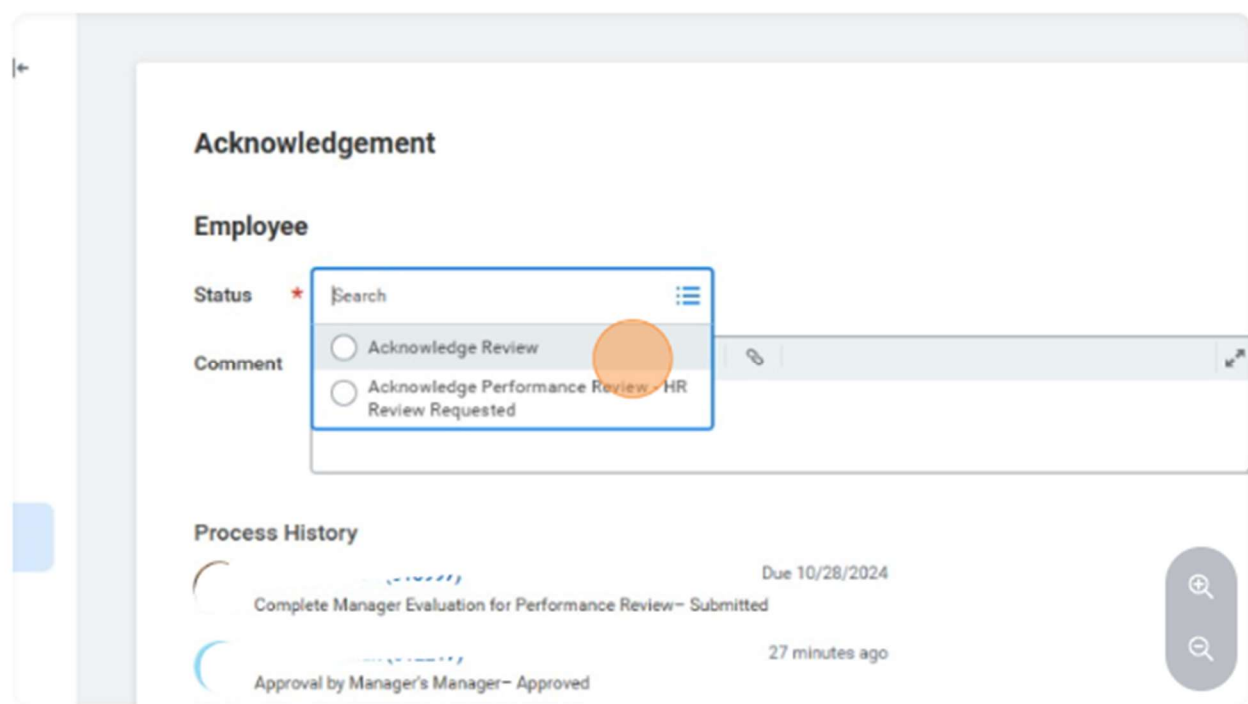
Status *

Comment

Format B I U A

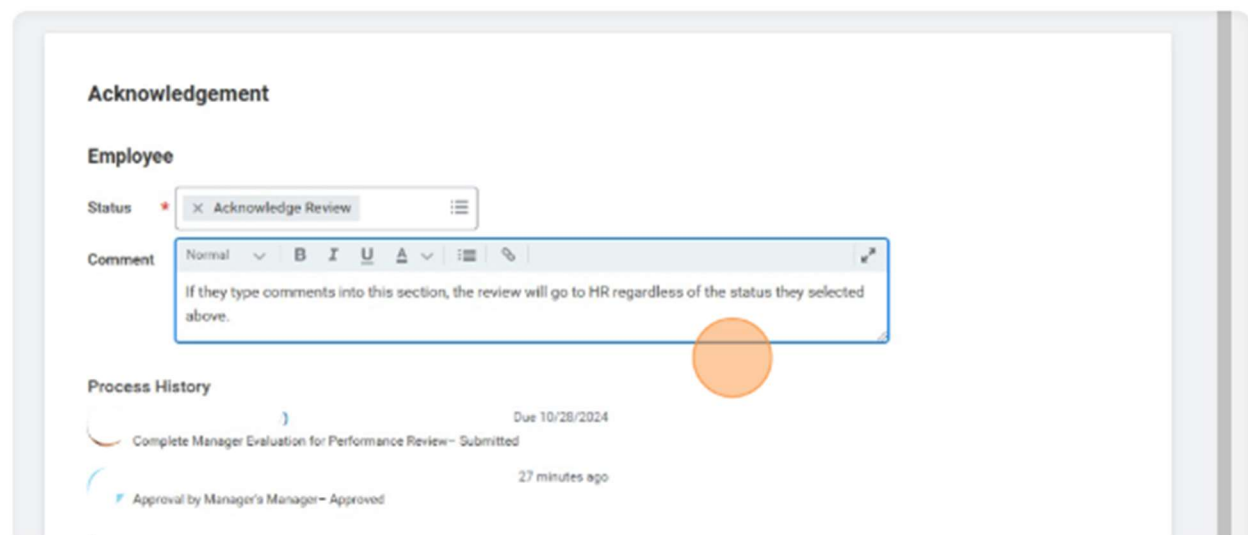
Process History

- 15 Click the appropriate selection. Acknowledging the performance does not indicate agreement, it simply acknowledges that the evaluation conversation took place. If team members would like an additional HR review, they can select that option.



The screenshot shows the 'Acknowledgement' form. Under the 'Employee' section, the 'Status' dropdown menu is open, displaying two options: 'Acknowledge Review' and 'Acknowledge Performance Review - HR Review Requested'. An orange circle highlights the second option. The 'Comment' field is empty. Below the form, the 'Process History' section shows two steps: 'Complete Manager Evaluation for Performance Review - Submitted' (Due 10/28/2024) and 'Approval by Manager's Manager - Approved' (27 minutes ago). A search icon is visible on the right side of the process history.

- 16 Team Members may elect to leave comments, but it is not required. All performance evaluations with comments will go to HR.



The screenshot shows the 'Acknowledgement' form. Under the 'Employee' section, the 'Status' dropdown menu is set to 'Acknowledge Review'. The 'Comment' field is active, showing a text area with a toolbar (Normal, Bold, Italic, Underline, Link, Unlink, Image, Video, Audio, Table, Code, Quote, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo) and a text input area. An orange circle highlights the comment field. Below the form, the 'Process History' section shows two steps: 'Complete Manager Evaluation for Performance Review - Submitted' (Due 10/28/2024) and 'Approval by Manager's Manager - Approved' (27 minutes ago).

17

Click "Submit"

Summary

Acknowledgement

Process History

Due 10/28/2024

Complete Manager Evaluation for Performance Review- Submitted

27 minutes ago

Approval by Manager's Manager- Approved

8 minutes ago

Approval by HR Administrator- Approved

8 minutes ago

Report: Employee Review Printout- Step Completed

1 minute ago

To Do: Employee Review Hold Step- Step Completed

1 minute ago

To Do: Second Hold Step - Employee Review- Step Completed

Submit

Save for Later

