

END-OF-YEAR CONVERSATION

The performance management process provides managers and employees a framework for engaging in regular communication throughout the year about goals/expectations, performance, and employee development. The process should include dialogue rich with specific examples of expectations, actual performance, and impact during which both parties acknowledge and come to agreement on performance highlights that are then briefly summarized through documentation. *The End-of-Year Conversation process is initiated by HR*; however, managers can initiate performance reviews throughout the year.

Request (Get) Feedback for a Worker (Employee)

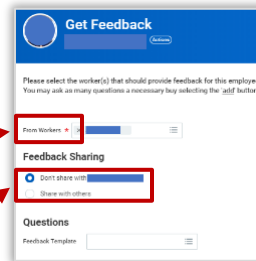
When the End-of-Year Conversation process is initiated, the manager will receive an **Inbox** task to request feedback on the employee.

While you have the option to skip this step, we strongly encourage its utilization.

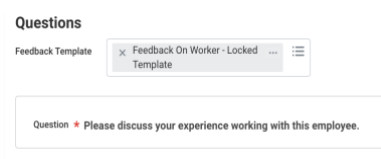
1. Navigate to your **Inbox**. Select the **End of Year Review: (Employee Name)** item to complete the **Get Feedback** task.

Enter the following:

2. **From Workers:** Enter the name(s) of the worker(s) that you wish to provide feedback on the employee or click **Prompt** to select from **Suggested Workers, Workers by Manager** or **Workers by Location**. Multiple workers may be selected.
3. **Feedback Sharing:** Important- Select the **Don't share with others** option. *This ensures that feedback is shared only with the requesting manager.*



4. **Questions Feedback Template:** Do not remove the defaulted 'Feedback On Worker – Locked Template'.

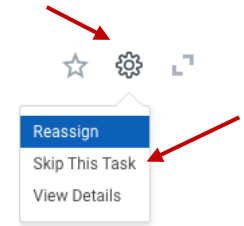


5. Select one of the following:
 - a. **Submit:** Send feedback request to the listed worker(s)
 - b. **Save for Later:** Keep changes and exit
 - c. **Close:** Exit without saving changes

6. Click **Done** to close out the task.

Skip the Get Feedback Task

1. Navigate to your **Inbox**. Select the **Get Feedback** task.
2. Click the **Gear icon** in the top right corner of the screen and select "Skip this Task."
3. Click **OK**.



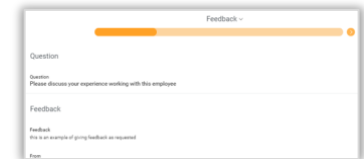
Important: You must **SKIP** this task if you do not plan to collect feedback. The employee self-evaluation **will not be visible** to you upon their submission until this task has been completed.

Review Employee Self-Evaluation

When the end-of-year conversation process is initiated, the employee will receive an **Inbox** task to complete a self-evaluation. The manager will receive an **Inbox** task to continue the process once the employee has submitted their self-evaluation.

- **Note:** All requested feedback may not be received by the time the employee submits their self-evaluation. To review outstanding feedback requests, refer to the [Manage Feedback](#) job aid for more information.
- To rescind the feedback request, navigate to the **Inbox > Archive**. Select the feedback request task. Click **Rescind**.

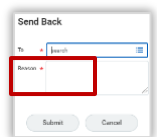
1. Navigate to your **Inbox**. Select the **Manager Evaluation: End of Year Review** task. Competency definitions will appear for your reference. Click **X** to close the information box.



2. Click **Go to Guided Editor** to review feedback received for the worker. Click **Next**.

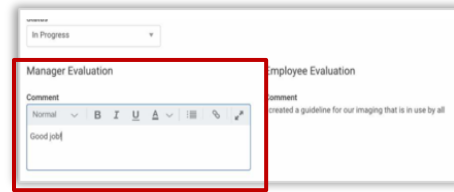


3. Review employee self-evaluation related to Goals/Expectations and Development Activities. Employee comments are viewable beside the **Manager Evaluation** section.



To enter comments, click on the **Manager Evaluation** section to open the text box. Click **Expand** to open the comment window to full screen.

Click **Save** to save your comments or **Undo** to exit editing without saving.



4. Click **Next**.
5. Review employee self-evaluation related to the Questions section. Employee comments are viewable beside the **Manager Evaluation** section.

To enter comments, click on the **Manager Evaluation** section to open the text box. Click **Expand** to open the comment window to full screen. Click **Save** to save your comments or **Undo** to exit editing without saving.

6. Click **Next**.
7. Review the **Summary** of your responses. To edit a response click **Edit** to change your response directly from the **Summary** page or click **Guide Me** to return to the Guided Editor to navigate through each of the individual review sections.
8. Select one of the following:
 - a. **Submit**: Complete the evaluation and initiate next step
 - b. **Send Back**: Send back to employee for edits/refinement
 - c. **Save for Later**: Keep changes and exit
 - d. **Close**: Exit without saving changes

Manager/Employee Meeting

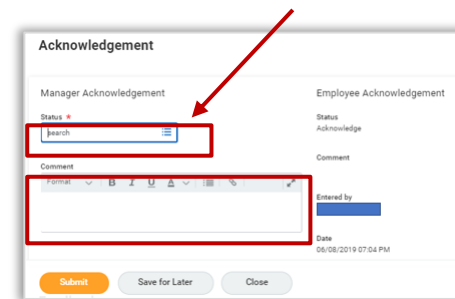
1. You will receive a task in your **Inbox** to complete the **Manager/Employee Meeting**. **Do not** click **Submit** on this task until you have completed the **Manager/Employee Meeting**.
2. Schedule the Manager/Employee conversation and meet with the employee.

3. Following the meeting, navigate to your **Inbox**.
4. Select the **To Do** task: **Manager/Employee Meeting Required** task. *Confirm you are selecting the task for the correct employee.*
5. Click **Submit** to acknowledge that the conversation has occurred. Consider including the date the conversation took place in the comment section.

Note: Once you submit this step, the employee will be able to view all manager comments on the template. Feedback from others **will not** be visible to the employee.

The Employee will receive a task in their **Inbox** to acknowledge the conversation and provide additional comments. Once this task is complete the Manager will receive a task in their **Inbox** to acknowledge and review.

1. Navigate to your **Inbox**. Select **Manager Evaluation: End of Year Review** for the employee. The Employee Acknowledgement and comments are viewable on the screen.
2. In the **Manager Acknowledgement** section, click **Prompt** in the **Status** box and select **Acknowledge** (required).



Click in the **Comment** box to add final comments about the Manager/Employee conversation. Comments are not required. Manager comments will be visible to the employee.



3. Select one of the following:
 - a. **Submit**: A green check mark is displayed to indicate the process is complete
 - b. **Save for Later**: Keep changes and exit
 - c. **Close**: Exit without saving changes

Initiate Performance Review: Manager

From the Workday homepage:

1. Enter **Start Performance Review** in the **Search** bar. Click the Enter key.
Select **Start Performance Review for Employee**.

Enter the following:

2. **Employee:** type name of employee or click **Prompt**  to select from **My Team**
3. **Review Template:** Click **Prompt**  **By Type > Summary Review > End of Year Review**
4. **Period Start Date:** Enter today's date (or will default depending on review type)
5. **Period End Date:** Enter today's date (or will default depending on review type)
6. Click **Submit**. 