Manager

VIEW PAST EMPLOYEE PERFORMANCE REVIEWS

Past (and current) performance review documentation related to Goal/Expectation Setting, Check-In Conversations, and End-of-Year Conversations is maintained in Workday for your reference and can be viewed at any time. **Note:** Performance reviews completed prior to the implementation of Workday on April 1, 2019 are currently not available in the Workday system. Please contact Human Resources for access to reviews completed prior to the date listed above.

View Employee Performance Reviews

From the Workday homepage:

- 1. Click View All Apps.
- 2. Click the **Team Performance** application.
- 3. Click Employee Reviews from the Actions menu.

Enter the following:

- 4. Organizations: Click Prompt ≡ to select My Organizations.
- 5. Include Subordinate Organizations: Click the checkbox if desired. This will enable you to view completed review processes for non-direct reports within your organization.

Team Performance

Note: You will not be able to view review content for employees not listed in your supervisory organization, only completed processes.

- 6. Review Templates: Click Prompt ≔ to list the review types.
 - **a.** To view <u>multiple</u> review templates: Click **All Review Templates** and click the checkbox(es) to select the desired templates to view
 - b. To view a <u>single</u> type of performance review: Click Active By Review Type

- i. Select the review template category:
 - Corrective Action
 - Performance Improvement Plan
 - Performance Review
- ii. Select the review type:
 - Check In: Documentation from Check-In Conversations
 - Goal Setting: Documentation from the Goal/Expectation Setting process
 - **Summary Review:** Documentation from the End-of-Year Conversation

← Active By Review Type	
Corrective Action	2
Performance Improvement Plan	2
Performance Review	3
	5

Check In	Ռո
Goal Setting	
Historical Performance Reviews	1
Summary Review	1
search	

← Check In	
Check In Meeting	F

- iii. Click the checkbox to select the review type
- 7. Click **OK •** to generate the list.
- The Employee Reviews list has two tabs: In Progress and Completed. The Review column lists the Review Names as Review Type: Employee Name.

To display the status of the review click the desired **Review Name**. The **View Event** report tabs list the status of each **Process** step.

← Employee Review	S			⊠ 🖶
Organizations No Include Subordinate Organizations No Review Templates Check In In Progress Completed by	Meeting			
Completed 1 item			X	1 🖬 🖓
Organization	Review	Review Category > Review Type	Evaluations	
	Check In Meeting:	Performance Review > Check In	Employee Manager	4
4				

- 9. To display a printable view of the review from the **Employee Reviews** screen:
 - a. Hover to the right of the review name and click Related Actions
 - b. Click Talent



Performance Management: View Performance Review and Status

c. Click View Printable Employee Review

The **Printable Employee Review** can be printed by clicking the printer icon at the top of the page.

Employee Re	eviews			
Organizations nolude Subordinate Organizations Review Templates	No End of Year Reviev	Actions		Employee Review
In Progress Completed		Audits Business Process Favorite	> > >	End of Year Review:
Organizations	Review	Integration IDs Reporting	>	Overall Status In Progress Initiated On 06/12/2019 10:08:38 AM
4	End of Year News	Talent	3	View Printable Employee Review Review Review

View Team Performance Review Summary

Review a summary of your team members' performance review statuses, with the ability to view the review and its process details.

From the Workday homepage:

- 1. Click View My Apps.
- 2. Click the Team Performance application
- Select My Team's Performance Reviews from the Actions menu. Reviews are separated by In Progress and Complete. Click the arrow > to expand the list of reviews by status.

Actions							e
In Progress						X 👳	±
Un Progress Worker	Performance Review	Current Step	Manager Rating	Employee Rating	Period Start Date	Period End Date	
	Check In Meeting:	Complete Self Evaluation - Initiation			05/31/2019	05/31/2019	-
							.
(•
> Complete							
-							
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4. To display the process history of the review, click the review name.



- 5. To display a printable view of the review:
 - a. Hover to the right of the review name and click Related Actions
 - b. Click Talent
 - c. Click View Printable Employee Review

Actions		Actions				×
> In Progress > Complete		Audita Business Process Favorite Integration IDs	>	Performance Review Check In Meeting: Subject Overall Status Successfully Completed	×	1
Worker	Performance Review	Reporting	- 5	Initiated On 06/08/2019 05:47:34 PM		
	Check in Meeting	Talent Im	Ť	View Printable Employee Review	ł	*

The **Printable Employee Review** can be printed by clicking the printer icon at the top of the page.



