

# Completing Manager Evaluation

This job aid describes the process for managers to complete manager evaluations.

⚠ Managers cannot begin reviews in Workday until self reviews are complete ([see how-to guide for completing self evaluation](#)).

1. Once employee has completed a self evaluation, manager will receive an inbox action item for manager evaluation. To begin, click on the inbox item.



**Manager Evaluation: 2022 - 2023 Staff Review (Supervisory): Kelly Lewis**

Inbox - 1 hour(s) ago

[Go to All Inbox Items \(1\)](#)

2. From the inbox item, click **Get Started**.

Review Period 10/29/2022 - 10/20/2023

22 hour(s) ago - Effective 10/20/2023

**Instructions:** Click in each section to add a rating. Comments may be added by the employee and are required for managers.

**Get Started**

3. Manager evaluations include three sections: **Core Competencies**, **Performance** and **Overall**. For each core competency, select the dropdown menu under **Rating** and select desired rating from list.

Competency	Description	Manager Evaluation	Employee Evaluation
Adaptability	Recognizing that organizational success requires a commitment to continual improvement and openness to new opportunities, picks up on need to change approach to work and interpersonal behavior quickly. Seeks feedback and adjusts as needed.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.
Collaboration	Builds constructive and effective relationships with other stakeholders. Uses diplomacy and tact to work cooperatively in group situations. Resolves conflict in a respectful and collegial manner.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.
Communication	Shares information in a clear and effective way, adjusting communication style as needed to reach different audiences. Demonstrates effective listening.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.
Dependability	Holds self accountable for meeting deadlines, commitments, and other basic expectations of employment including but not limited to attending work on a consistent and timely basis.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.
Compliance and Ethics	Adheres to legal requirements, industry-specific regulations, and university policy. Exercises appropriate judgment when faced with ethical dilemmas. Discloses potential conflicts of interest. Maintains confidentiality when appropriate.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.
Professionalism	Treats others with courtesy and respect. Wears appropriate workplace attire and demonstrates self-awareness of topic, tone, volume, and body language.	Rating ★ <div></div>	Rating Successful (S)  Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

4. At the end of the competency section there is an **Manager Summary** that will automatically calculate your rating for this section and provide an area to comment. Comments are required.

#### Manager Summary

Overall Rating Weight 33.3

Calculated Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment ★ 

Format

B

I

U

A

#### Employee Summary

Calculated Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment

5. To move to the next section, click **Next**.

Back

Next

Save for Later

Close

6. The next section is **Performance**. Evaluations for supervisors include an additional area for review called **Employee Management**. For non supervisory staff, skip to step 7. For managers, select the dropdown menu next to **Rating**, select desired rating from list and enter a **Comment**.

**Additional Area for Review**    **Employee Management:**  
Maintains two-way dialogue with employees on work and professional development. Sets clear objectives, monitors progress, and holds employees accountable for results. Recognizes accomplishments in a manner appreciated by employees.

#### Manager

Rating \*

Rating Description (empty)

Comment \* 

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

#### Employee

Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment

7. The next area for review under **Performance** is **Job Specific Duties and Goals**. (Note: for non supervisory staff, this is the only review area under **Performance**.) Select the dropdown menu next to **Rating**, select desired rating from list and enter a **Comment**.

**Additional Area for Review**    **Job Specific Duties and Goals:**  
Takes initiative to complete assigned goals. Effectively, efficiently, and consistently performs day-to-day job duties with minimal avoidable errors. Prioritizes work appropriately and independently solves problems within level of responsibility.

#### Manager

Rating \*

Rating Description (empty)

Comment \* 

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

#### Employee

Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment

8. At the end of the performance section there is a **Manager Summary** that will automatically calculate your rating for this section.

**Manager Summary**

Overall Rating Weight 66.67

Calculated Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

**Employee Summary**

Calculated Rating Successful (S)

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

9. To move to the next section, click **Next**.



10. **Overall** is the next section of the evaluation. This section automatically calculates your rating based on all ratings entered perviously. There is a place to add a final comment. There is also an option to change your overall rating. Note: Even if you change the overall rating, the original default rating will display under **Default Rating**.

**Overall**

Instructions: Click in each section to add a rating. Comments may be added by the employee and are required for managers.

**Manager**

Default Rating Successful (S)

Rating \* Successful (S) ▼

Override Calculated Rating ☐

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment \*

**Employee**

Default Rating Successful (S)

Rating Successful (S)

Override Calculated Rating ☐

Rating Description Performance may exceed expectations at times or benefit from continued development in some areas, but in general fully meets expectations for position.

Comment

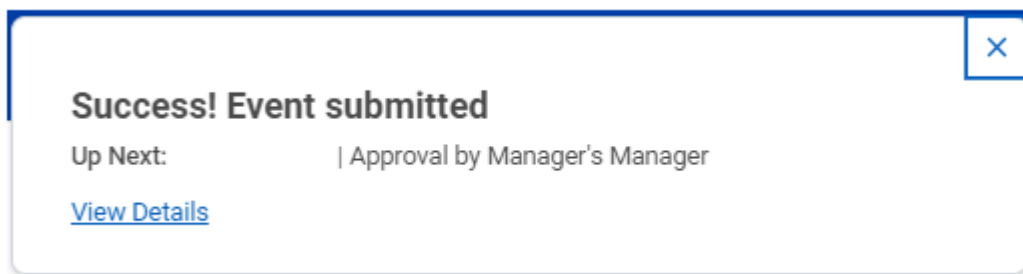
11. To move to the next section, click **Next**.



12. **Review and Submit** is the last section of the evaluation. This section includes each of the previous sections: **Core Competencies**, **Performance** and **Overall**. Review and click **Submit** to send your staff member's evaluation to your manager for approval.



13. After you click **Submit**, you will receive a notice that the event was successfully submitted.



14. Next level supervisor will receive an inbox action item to review and approve the manager evaluation. (For help with this process, see how-to called "Next-Level Manager Evaluation".)

⚠ Next step in the process requires manager to meet face-to-face with employee.

15 Once the next level manager approves, manager will receive another inbox action item. Click to open.



**Manager Evaluation: 2022 - 2023 Staff Review (Supervisory): Kelly Lewis**

Inbox - 15 minute(s) ago

16. This step tells you that it is now time to have your face-to-face meeting with your employee to go over the results.

⚠ **IMPORTANT: Do not click submit until after you have meet with your employee.** Clicking submit will allow your employee to view their evaluation.

**Complete To Do** [Employee Review Meeting](#) ...

37 second(s) ago - Effective 10/20/2023

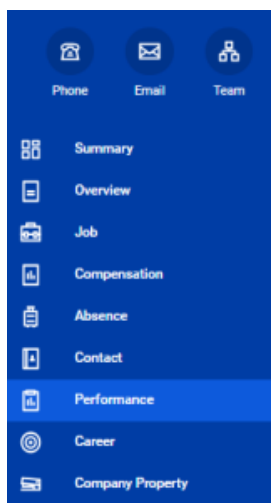
**For** [Kelly Lewis](#)**Overall Process** [2022 - 2023 Staff Review \(Supervisory\): Kelly Lewis](#)**Overall Status** In Progress

**Instructions** Your employee's review has been approved by your manager. Now it is time to have your face-to-face meeting with your employee to go over the results. When your meeting is complete, submit this action by clicking on the SUBMIT button. This will move the review on to the employee acknowledgement step.

17. To access a copy of the evaluation to share with your employee, navigate to the employee record by clicking the employee name.

**For** [Kelly Lewis](#)**Overall Process** [2022 - 2023 Staff Review \(Supervisory\): Kelly Lewis](#)**Overall Status** In Progress

18. Select **Performance**.



19. Select **Performance Reviews**.

Individual Goals

Development Plans

**Performance Reviews**

Archived Goals

**In Progress** 1 item

Review	Review Period		Status
	Start Date	End Date	
<a href="#">2022 - 2023 Staff Review (Supervisory): Kelly Lewis</a>	10/29/2022	10/20/2023	To Do: Employee Review Meeting

20. Evaluations can be viewed via Workday or downloaded to PDF.

a. To view via Workday, select **View**.

<b>View</b>	<b>Create New PDF</b>

b. To view via PDF, select **Create New PDF**.

<b>View</b>	<b>Create New PDF</b>

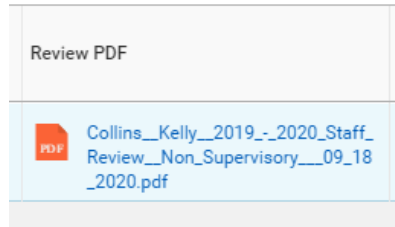
i. You may receive a notice that says **Your request is being processed**. Process takes a few moments to create.

**Your request is being processed**

You can continue to wait or choose to be notified later.

**Notify Me Later**

- ii. Click the PDF link under **Review PDF** to open document.



21. **Once you have met with your employee**, return to the inbox item to submit and move evaluation to the employee acknowledgement step. Click the **Submit** button.

**Complete To Do** Employee Review Meeting ...



37 second(s) ago - Effective 10/20/2023

For [Kelly Lewis](#)

Overall Process [2022 - 2023 Staff Review \(Supervisory\): Kelly Lewis](#)

Overall Status In Progress

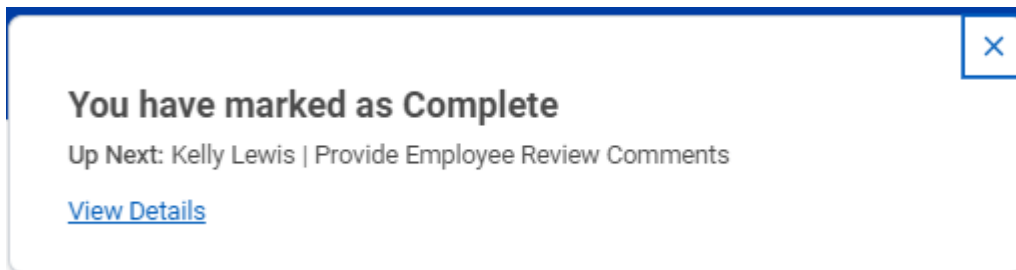
Instructions Your employee's review has been approved by your manager. Now it is time to have your face-to-face meeting with your employee to go over the results. When your meeting is complete, submit this action by clicking on the SUBMIT button. This will move the review on to the employee acknowledgement step.

**Submit**

Save for Later

Close

22. After you click **Submit**, you will receive a notice that the event was successfully submitted.



❗ Next step in the process requires employee to acknowledge receipt. Steps to be completed by employee.

❗ Next step in the process requires manager to review comments and complete evaluation

23. Manager will now receive final inbox action item to review comments and complete evaluation. Click to open.





## Manager Evaluation: 2022 - 2023 Staff Review (Supervisory): Kelly Lewis

Inbox - 3 minute(s) ago

[Go to All Inbox Items \(1\)](#)

24. From the inbox item, click **Get Started**.

Review Period 10/29/2022 - 10/20/2023

After reviewing any employee comment with their acknowledgement, confirm review is complete by clicking in the status box and selecting confirmation. A comment may be added before clicking Submit to finalize the review. Contact Employee Services with any concerns before finalizing.

Get Started

25. Review the **Summary** and click **Next** to move to the acknowledgement.



26. Review comment entered by employee (note – employee comment is not required, but manager should contact Employee Services with any questions or concerns on what employee wrote).

### Acknowledgement

#### Manager

Status \*

Comment 

Format ▼ **B** *I* U A ▼ ☰ 🔗 ↗

#### Employee

Status I acknowledge receipt of this review

Comment

Acknowledged By Kelly Lewis

Acknowledgement Date 08/31/2023 01:22 PM

27. When ready to acknowledge, click in the **Status** field.

## Manager

Status \*

28. Select **I confirm I have reviewed any comments provided by the employee below and that this review is now complete.**

☐ I confirm I have reviewed any comments provided by the employee below and that this review is now complete.

29. Manager can also enter a comment in the **Comment** section. To save, click the checkmark in the top right corner.

### Acknowledgement

#### Manager

Status

✕

I confirm I have reviewed any comments provided by the employee below and that this review is now complete.

⋮

Comment

Normal ▾

**B**

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A ▾

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ENTER COMMENT HERE...

#### Employee

Status

I acknowledge receipt of this review

Comment

Acknowledged By

Kelly Lewis

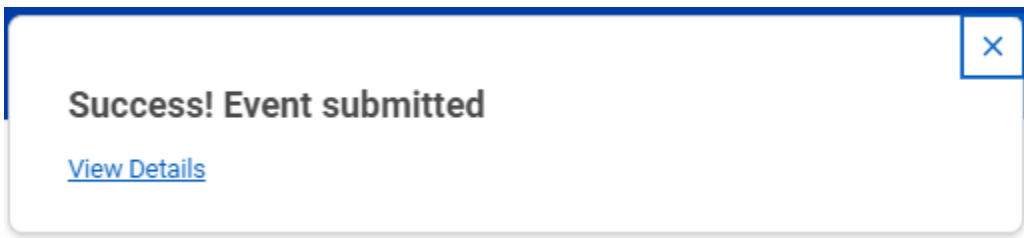
Acknowledgement Date

08/31/2023 01:22 PM

30. To complete, click **Submit**.

Submit Save for Later

31. After you click **Submit**, you will receive a notice that the event was successfully submitted.



32. Process is now complete.