**Workday Job Aid – Manager Self Service**

Completing Your Direct Report’s Annual Performance Review

The instructions below will guide you through completing the manager’s portion of the Annual Performance Review

1. Once your direct report has completed their self-evaluation, you will receive a task in Workday for the manager’s evaluation.
2. Log into Workday (<https://www.myworkday.com/theclaremontcolleges/d/home.htmld>) with your CMC login credentials.
3. To access the first task and complete the manager evaluation step, go to your Workday Tasks by clicking on the mailbox icon from the top right-hand corner of the screen. 
	1. Alternatively, the manager evaluation will be accessible from your Workday home page under the **Awaiting Your Action** section



1. Locate the task named **Manager Evaluation: CMC Annual Performance Review for Staff** and click Get Started to start the manager evaluation.



1. Complete the manager evaluation sections:



# **Goals**

1. Please review your direct report’s responses in the **Goals** section. You will have the opportunity to review and respond to each of their goals.
2. Please enter a **Rating** for each Goal.



1. Click **Add**  under the Goals section header to enter new goals for the employee. After you click Add, new fields will appear, allowing you to enter additional details about the goal.
	1. In the **Goal** text box, enter a title for the goal you are adding.



* 1. Select a **Status** for the goal



* 1. Enter a **Rating** for the Goal



1. Repeat step 3 for each additional goal.
2. Click Next when finished entering goals.



# **Competencies**

1. Please review your direct report’s responses in the **Competencies** section.
2. For each Competency, please select a rating in the **Proficiency Rating** field. Note: The employee’s response to each competency will be visible to you.



1. Each competency also includes a **Comment** box, where you can add explanations and additional notes on your rating, as well as provide specific examples from the evaluation period.
2. Once you have provided the Proficiency Rating for each Competency, the competency ratings will be averaged in the **Manager Summary** section.



1. Click Next when finished rating the Competencies.



# **Management Competencies**

Note: **If your direct report supervises one or more employees**, please rate your employee’s performance as it relates to each competency. Add explanatory comments and specific examples or illustrations from the evaluation period.

**If your direct report does not supervise any employees**, please select Does Not Apply as the rating option for each competency.

1. Please review your direct report’s responses in the **Management** **Competencies** section (if applicable).
2. For each Competency, please select a rating in the Proficiency Rating field (or select **0 – Does Not Apply** if your direct report does not supervise employees)



1. Each management competency also includes a **Comment** box, where you can add explanations and additional notes on your rating, as well as provide specific examples from the evaluation period.
2. Once you have provided the Proficiency Rating for each Competency, the competency ratings will be averaged in the **Manager Summary** section.



1. Click Next when finished rating the Management Competencies.



# **Summary of Performance Evaluation**

1. Please review your direct report’s response in the **Summary of Performance Evaluation** section.
2. For the Summary of Performance Evaluation, select an overall rating in the **Rating** field.
	1. Note that you will see the calculated average rating from the previous sections



1. You may also provide any concluding thoughts or comments regarding your direct report’s performance to support your rating in the **Comment** box.
2. Click Next when complete.



# **Contribution to College**

1. Please review and provide a response to your direct report’s **Answer** in the **Employee** **Contribution to College** section.



1. Click Next when complete.



# **Review and Submit**

1. Please review your responses to the manager evaluation for completeness and accuracy.
	1. If you need to make updates to any responses, you may do so by clicking on the section in the left-hand navigation menu.



1. When you are finished making updates to your direct report’s review and are ready to submit, click **Submit**.



# **Next Steps**

* The performance review will now route to your manager to review your direct report’s evaluation. Once this is complete, the performance review will route to CMC Human Resources.
* Once the performance review is fully completed and approved, you will receive a reminder in Workday to coordinate a time to meet with your direct report to discuss the evaluation.



* After you meet with your direct report, your direct report will receive a task in Workday to acknowledge the review. Once your direct report acknowledges their review, you will receive a new task in Workday.



* Open the new task (**Provide Manager Review Comments**) and click Get Started



* You will have one last opportunity to review your direct report’s performance evaluation in the Summary Section.



* After you have reviewed your direct report’s performance evaluation and have had the opportunity to discuss it with them, please Acknowledge the review by navigating to the **Acknowledgement** section on the left-hand menu, clicking on the Status drop-down menu, and selecting Acknowledge Review.



* Click **Submit** when you are done.

