**Employee Annual Performance Review – Self Evaluation**

**Important - Hourly employees are required to be clocked in when they complete their self-evaluations.**

**If you have any questions, please contact the HR Help Desk**

**HR Help Desk:**[**hrshared@marshfieldclinic.org**](mailto:hrshared@marshfieldclinic.org)

**HR Help Desk Number: 715-387-5254 ext. 75254**

**HR Help desk hours - Monday - Friday, 8:00 a.m. to 5:00 p.m.**

**Timeline for 2019 Annual Performance Reviews**

**December 31, 2019** – Due date for self-evals to be completed and submitted in Workday.

Any self-eval not completed will be pushed to the next level and employee will not have the opportunity to complete their self eval. Managers can give an earlier due date, but they can’t give a later due date. If your manager chooses to give an earlier due date they will communicate the date via email.

**February 19, 2020** – Deadline for managers to have the reviews submitted in Workday. This step produces the performance score.

**May 31, 2020** - Any performance review not acknowledged by employee and/or manager will be pushed to completion.

**Instructions for completing the self-evaluation in Workday**

The employee self-evaluation will be in the employee’s inbox in Workday

1. Open Workday
2. Open your Inbox by clicking the inbox at the top right-hand side of your screen.



1. Click on the “Self Evaluation: (year) Employee Annual Performance Review: (your name)”
2. Click the “Fullscreen viewing mode” button in the upper right-hand corner .
3. Read through the Process so you understand the timelines and processes.
4. Click the “Go to Guided Editor” to be guided step-by-step thru the self-eval process. The Guided Editor will display the definitions of the Competency ratings. The Summary editor does not display the definitions.

If you are working on your self-eval and want to save it to work on it later and the “Save for Later” button is not visible on the bottom of the screen, click on “summary” on the left-hand side of the screen. Then click on the “Save for Later” at the bottom of the screen.

1. **Accomplishments tab**
   1. Employees may enter any accomplishments completed during the calendar year. This is not a required action. However, this is a great opportunity to list the things that you are most proud of from the review year. Please keep in mind that the accomplishments must be work related and relevant to the organization.
   2. To make an entry click the Add button
      * Enter the Accomplishment in the Accomplishment box.
      * Add any comments regarding the accomplishment in the comments box and click the check mark to save.
      * To enter more Accomplishments, click the Add button.
      * To delete any accomplishment after you have entered it, click the on the right-hand side of the screen. If you have multiple accomplishments, make sure it is next to the accomplishment that you want to delete.
   3. Click the” Next” button on the bottom of the page to advance to the next tab.
2. **Goals tab**
   1. Goals for employees are not required at a system level. However, they may be required at a department level. If unsure, check with your manager.
   2. **Do not** enter your goals for next year on the review that you are completing for the current year.
   3. Enter any new goals on the Performance/Goal. The Performance/Goal is available year round so you can manage your progress throughout the year.
   4. When doing your self-eval for your annual review, you can pull in the goals that are pertinent to the review period that have been entered. You should only pull in the goals that you set for the review year.
      * When in the Goals section on your self-eval click “Add”
      * Click the box by “Use Existing Goal” to bring the goal into the review.
      * Click the list button ****
      * Choose “All Valid Goals for Selection”. A list of goals that you have entered will appear. Choose the one that you would like to bring in.
      * Edit the fields that appear
      * If you would like to bring multiple goals in, click the Add button and repeat the process.
      * If you have not entered your goals for the review year into the “Goal Details” tab, please follow the instructions below for entering goals. Your manager will need to approve them. Once your manager approves your goal, you will be able to go back to your self-eval and pull in the goals.
   5. To enter goals:

* From the Workday homepage, click the Performance application worklet .
* Click Goals on the right-hand side of the screen
* Click Edit at the bottom of page.
* Click Add.
* In Goal box, enter name of goal.
* In Description, describe goal.
* Select Category of goal.
  + - Multiple categories can be selected
* Select Status of goal.
* Select Due Date of goal.
* Click Submit.
* Click Done.

Note: Once submitted, goal(s) will be sent to manager for approval. There is no limit to the number of goals entered.

1. **Competencies tab**
   1. All employees will have the same seven competencies, five are MCHS’ Core values and two are pertaining to your job knowledge and skill. If you rate yourself anything other than “Consistently Meets and Occasionally Exceeds Expectation”, you need to include a comment defining why.
   2. The rating definitions are on the top of the Competencies tab and are listed below as well. Please familiarize yourself with these ratings prior to completing the Competency tab.
   3. Ratings are required for all competencies. The system will not allow you to “submit” unless all competencies have been rated. If you attempt to submit when all competencies have not been rated, you will receive this error :
      * ERROR – All competencies require a ranking. One or more have not been ranked. Please review and assure all competencies are ranked. If you are saving for later, you can complete your evaluations of competencies at a later date, but they must be completed to submit.
      * If you receive this error message, the system will assume you are saving it for later. It will be in your Workday inbox for you to continue working on at a later time.
   4. To enter a rating:
      * Click the pencilon the right-hand side of each competency (or you can click anywhere within that competency) to bring up the edit screen.
      * Choose the rating by clicking the arrow and choosing the ranking from the list.
      * Comments can be entered by clicking in the Comments section. Comments are required if you rate yourself anything other than “Consistently Meets and Occasionally Exceeds Expectation”.
      * To go to the next competency, click the pencil on the right-hand side of the screen for the next competency. If you click the Next button on the bottom of the screen it will advance you to the next tab. If this should happen just click the Back button.
      * Once all competencies have been ranked, click the Next button.
   5. Click the “Next” button on the bottom of the page to advance to the next tab.

**Definition of Ratings**:

**New to the role/task(s):**

Employee has recently been introduced to this position/task.  Employee has not attained the competency to perform role/tasks independently but is performing at the level expected in the orientation/learning period.

**Not meeting expectations:**

Performance did not meet expectations as defined in the job description or by the manager.  Improvement is needed to fully meet the expectations.  **(Comments must be entered regarding why the individual is receiving this rating).**

**Consistently meets or occasionally exceeds expectations:** Performance consistently met expectations as defined in the job description or by the manager and may have occasionally exceeded these expectations.  This individual made meaningful and significant contributions and demonstrated a high level of competency.

**Consistently exceeds expectations:**  Performance consistently exceeded expectations defined in their job description or by their manager.  This individual made outstanding contributions on a continual basis, far exceeding the defined expectations and far out performing their peers.  Achievements were clearly distinguishable and highly valued by others.  **(Comments must be entered regarding why the individual is receiving this rating).**

1. **Overall tab**
   1. The Overall section shows your overall rating of your self-eval. This is an average of the competencies that have been rated. If you have missed rating any competencies, it will pull your average down.
   2. If you would like to add comments, click the pencilon the right-hand side and enter your comment(s) in the comment box.
   3. Click the “Next” Button on the bottom of the page to advance to the next tab.
2. **Supporting Documents tab**
   1. Supporting documents are not required.
      * If you attach a document, follow these steps:
        + To attach a supporting document, click “Add”
        + Click “Attach”
          - Double click on the document in your directory

The file name will appear in Workday

Do not include any PHI such as patient name, date of birth, date of service, address, phone number, MHN, etc.

* + - * + Comments can be entered, but are not required.
  1. Click the Next box on the bottom of the page to advance to the next tab.

1. **Summary Tab**
   1. This tab allows you to review everything that you have entered.
   2. If you need to make a change, you can click on the pencil on the right-hand side for the area that you wish to change.
   3. If you click the “Guide Me” button on the right-hand side it will take you back to the actual tab.
   4. If you need to save your self-eval to go back in at a later time, Click “Save for Later” at the bottom of the summary tab. If you are working on your self-eval and the “Save for Later” button is not visible on the bottom of the screen, click “summary” on the left-hand side of the screen. The “Save for Later” button will be on the bottom of your screen.
      * If you “Save for Later”, the self-eval will remain in your Workday inbox. When you go back in to complete your self-eval, you would need to open it from your inbox. Use the same process you did when you first opened it. Your self-eval will remain in your inbox until you submit it.
   5. Once you have completed your self-eval, click “Submit” and “Done” at the bottom of the summary tab.
      * The manager is not able to complete the manager’s portion of the evaluation until the employee has submitted it.
      * Once you click submit, you are not able to make changes to your self-eval. You will, however, be able to make comments when you acknowledge your review once it has been delivered to you from your manager.
2. To view your self-eval after you have submitted it, you will need to access it thru your Workday home page. Click the Performance worklet. Under “My reviews” click on the current year review and then click “View Details”. Another way to access your reviews would be to view your profile by clicking the picture on the top right-hand side of the screen and clicking “View Profile”. Then click the Performance tab, Performance Reviews and click the “View” box on the right-hand side of the review you would like to see. This will open up the review.

**REMINDER: You must complete and submit no later than 12/31/19**

