

Performance Management in Workday



College of Engineering Training





Agenda

- What's staying the same and what's changing?
- Timeline
- Reminders
- Overview
- Walkthrough



What's staying the same?

- Policies around performance management and discipline remain the same
- Focus is on talent development, retention, and open dialogue between manager and employee
- Instructional Academic Staff (Lecturers, Teaching Faculty, etc.) will continue to have performance management completed in PMDP at this time
- Midpoints evaluations will cover first half of the fiscal year (July 1 – December 31)
- Summary Evaluations will cover entire fiscal year (July 1– June 30)



What is changing?

- Campus HR will launch non-probationary midpoint and annual performance reviews for the whole organization
 - This will kick off a tasks for managers to complete and will show on your Workday home page and inbox
- Strict due dates in Workday. Cannot be performed at anytime like in PMDP.
- **Reminder:** to be eligible for salary increases, managers must be up to date on all direct reports' performance evaluations
- Updates to rating scale and overall evaluations differ from language in PMDP

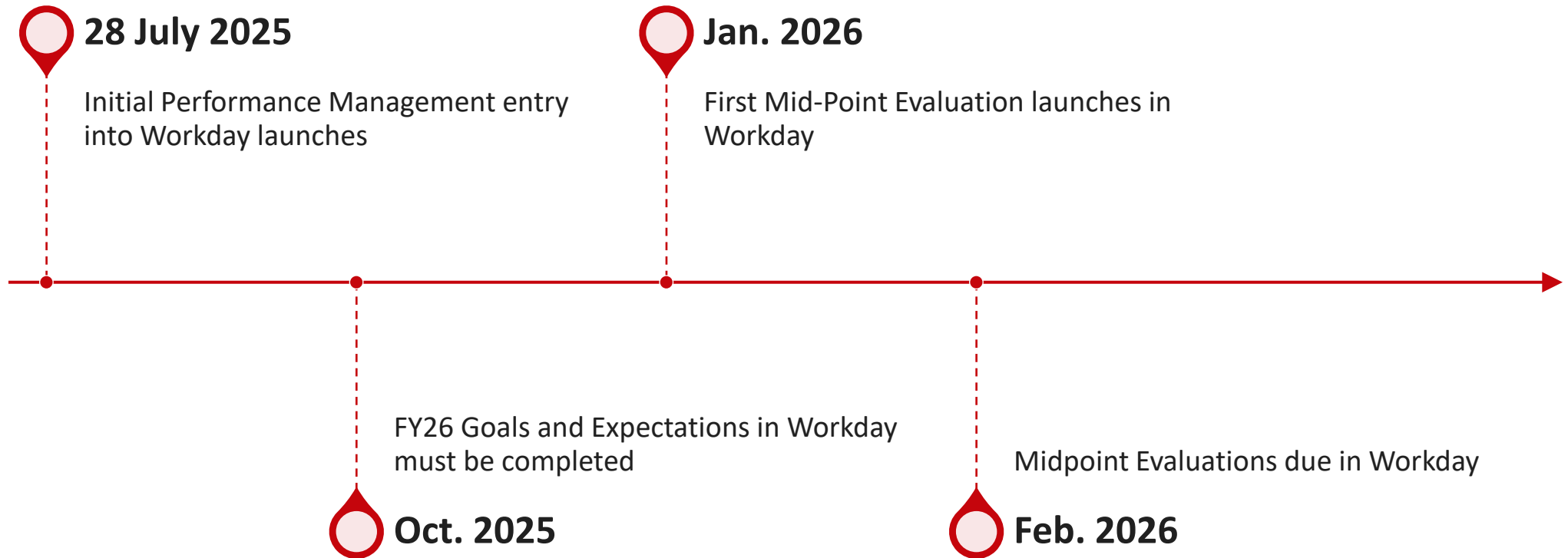


What is changing? (cont.)

- Performance Improvement Plans will be documented in Workday starting in 2026 – launch date to be determined
- Employees with multiple appointments will have a separate process for their secondary jobs
 - Divisional HR will work directly with the supervisors impacted by this
- Employees will be able to provide a self-evaluation in Workday for both the midpoint and summary evaluations



Timeline





FY25 Summary Evaluations and Goals & Expectations Process

- Annual performances reviews from last year should have already been completed in PMDP. Performance reviews from last fiscal year (July 1, 2024 – June 30, 2025)
- PMDP information on past evaluations will not transfer into Workday
- Supervisors received a task on July 28, 2025, to complete a performance management setup and goals for **all employees**
 - Must be completed by **October 2025**.



Probationary Employees

Employee Situation	Process to follow
Probation End Date - July 28 Launch Date	Complete Final Probation Review in PMDP. Manager will get receive a task in Workday, and need to set expectations, goals, etc.
New employee started June 1 – July 7	Managers should have had 30-day conversation, but wait to complete documentation in Workday
New employee <i>starting July 7 and after</i> • <i>Newly Hired directly in Workday</i>	Talent Partner will send task to Manager to Start New Employee Goals and Expectations as part of hiring process



Employee Classifications in Workday Performance

Required For

- Limited
- Academic Staff – non-Instructional
- University Staff

Will Not Use For

- Student Hourly Positions
- Contingent Workers
- Faculty

Anticipated Future Use*

- Short-Term University Staff (TE)
- Short-term Academic Staff
- Instructional Academic Staff

*will not be used at this time, more information to come



Process in Workday

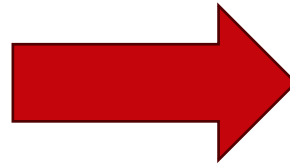
- New probationary evaluations will be launched by Talent Partner
 - Department Administrators in most cases
- Annual Summary evaluations will launch at the start of each fiscal year (review period July 1-June 30)
 - Due date of September each year
- Midpoints Evaluations will launch at start of each calendar year (review period July 1-December 31)
 - Due date of February each year



Process: Responsibility Ratings

- Must provide a rating for **each job responsibility**.
- PMDP "Developing" no longer an option—could be used to describe one or more future state ratings

PMDP STATE
Exemplary
Successful
Partially Meeting Expectations
Developing
Not Meeting Expectations
Unable to Rate/Not Rated



WORKDAY NEW STATE
Exceeding Expectations
Meeting Expectations
Partially Meeting Expectations
Failing to Meet Expectations
Not Applicable



Overall Ratings

PMDP

- Meeting Expectations
- Not Meeting Expectations

Workday

- Exceeding Expectations
- Meeting Expectations
- Partially Meeting Expectation
- Failing to Meet Expectations

- Purpose: will allow us to more accurately reflect an employee's performance in their performance evaluations



Performance Concerns in Workday

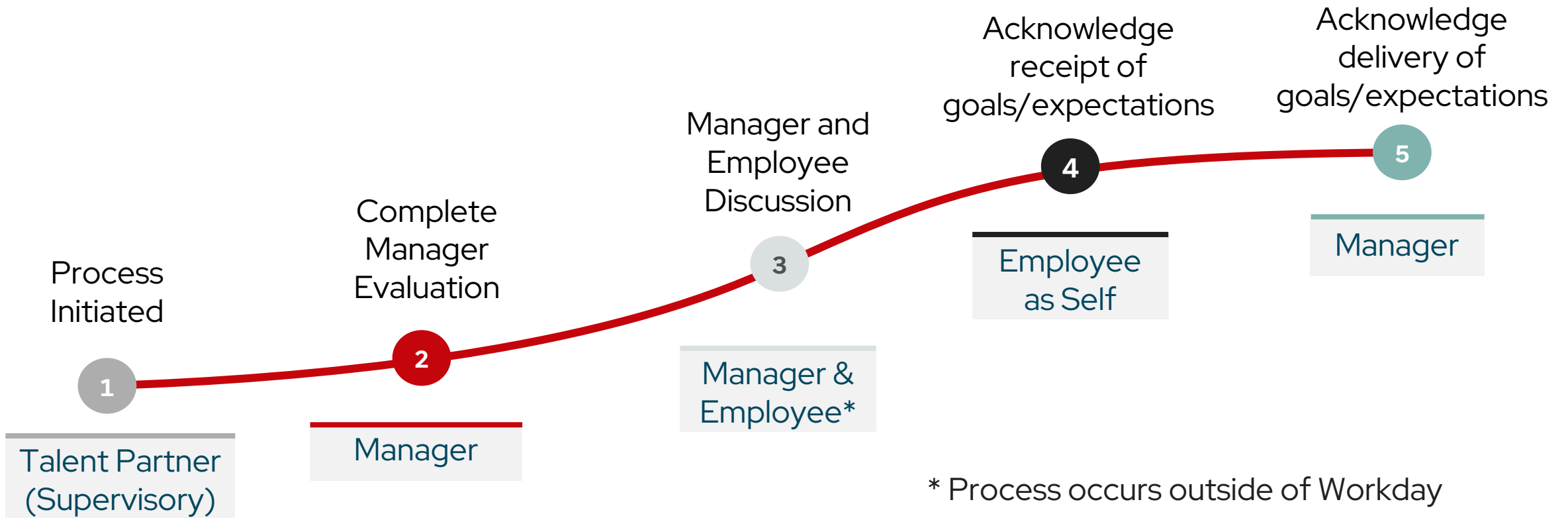
- Supervisors should continue to reach out to Divisional Human Resources throughout the year as performance concerns arise with employees
 - Can assist with coaching, conflict resolution, goal setting, and accommodations
 - Assists us in ensuring proper documentation per campus policies, procedures, and best practices
- Before discussing potential performance issues that may result in a Not Meeting Expectations or a Performance Improvement Plan with an employee, supervisors **must** first consult Divisional HR.
 - Important to ensure adequate documentation of performance issues
 - Stay consistent across the college
 - Discuss next steps in performance management of employee



Additional Reminders

- Note that all content in a performance evaluation becomes part of the employee's permanent personnel file
- Keep evaluation clear, concise, and specific to the review period
- Do not wait until the last week or two to complete all staff evaluations
 - Anticipate scheduling conflicts and complete evaluations earlier while the evaluation period is still top of mind
- **No medical information in performance evaluations**
 - This includes mentions of medical/parental leaves, accommodations, etc.
 - If you identify medical information that the employee provided in a self-evaluation, notify HR to have the evaluation pushed back so it can be removed

Process Overview: Goals & Expectations Probation Initiation





Process Overview: Midpoint and Summary Evaluation

- Annual Evaluation Staff
- Midpoint Evaluation



Walkthrough

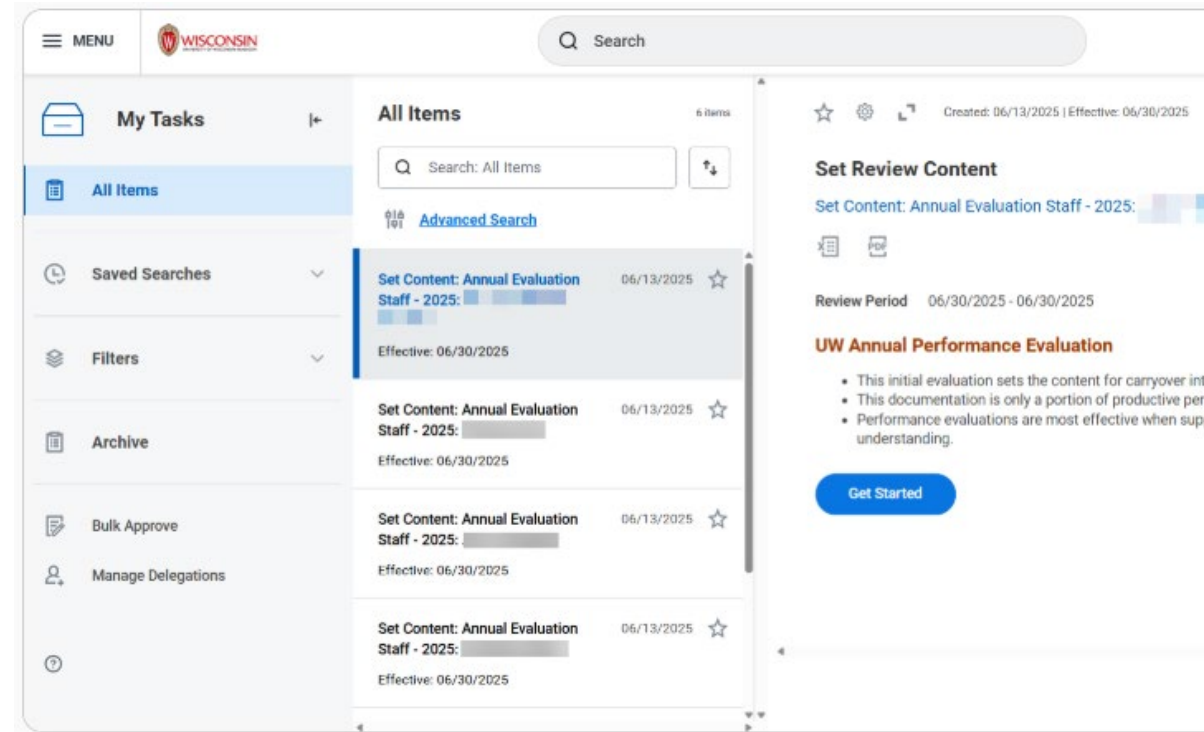
Manager and Employee view in
Workday





Initial Tasks to Complete by Manager

- **Step 1: Engage with assigned task.**
 - Open your assigned task, "Set Content: Annual Evaluation Staff - 2025: <Employee Name>."





Initial Tasks to Complete by Manager

- **Step 2: Verify the accuracy of auto-populated content.**

- Review responsibilities that have been pulled from the Standard Job Description (SJD) into the performance review. Responsibilities should always match what is in the SJD.
- Additional unique responsibilities should match an employee's official job description or position-specific Position Vacancy Listing.
- If you need to include Additional Responsibilities, select "Add" and enter the appropriate information.

The screenshot displays the 'Set Review Content' interface in Workday. The left sidebar shows a progress bar with three steps: 'Job Responsibilities' (selected), '2026 Goals', and 'Review and Submit'. The main content area is titled 'Job Responsibilities' and includes a section 'Adjust Responsibilities' with instructions: 'Review, edit, add, or delete responsibilities for this employee.' and 'To view the standard responsibilities from the job profile, click the View Related Information icon in the left panel.' Below this is a text editor with a 'Responsibility' label, a 'Format' dropdown, and buttons for Bold (B), Italic (I), Underline (U), and Text Color (A). The text area contains a blurred, auto-populated list of responsibilities. At the bottom, there are buttons for 'Back', 'Next', 'Save', and a menu icon (three dots).



Initial Tasks to Complete by Manager

- **Step 3: Add Goals from FY'25 Review**
 - Select "Add" to enter Goals from FY'25 performance review. Ensure all Goals are marked as "Not Started." Due Dates should be entered as either January 2026 or July 2026.
 - Select "Add" to enter all remaining Goals.
 - Once complete, select the "Next" button



Initial Tasks to Complete by Manager

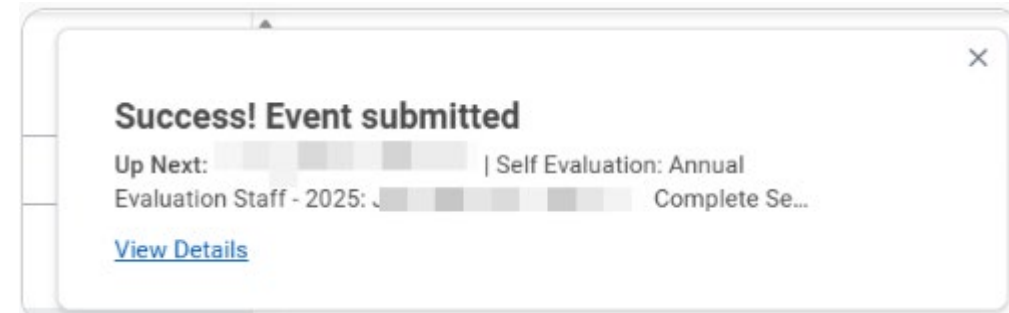
- **Step 4: Verify all entered information.**
 - Review all content you have entered and select "Submit" when done. If you need to make edits, use the navigation bar on the left to return to the Job Responsibilities or Goals section.
 - Select, "Submit" when done.



Initial Tasks to Complete by Manager

- **Step 5: Confirm submission.**

- A pop-up notification will appear that reads, "Success! Event Submitted."
- The evaluation has been sent to the employee. It is recommended that you also follow up directly with your employee(s) to inform them that their evaluation is awaiting action in Workday.





Next Step: To Employee

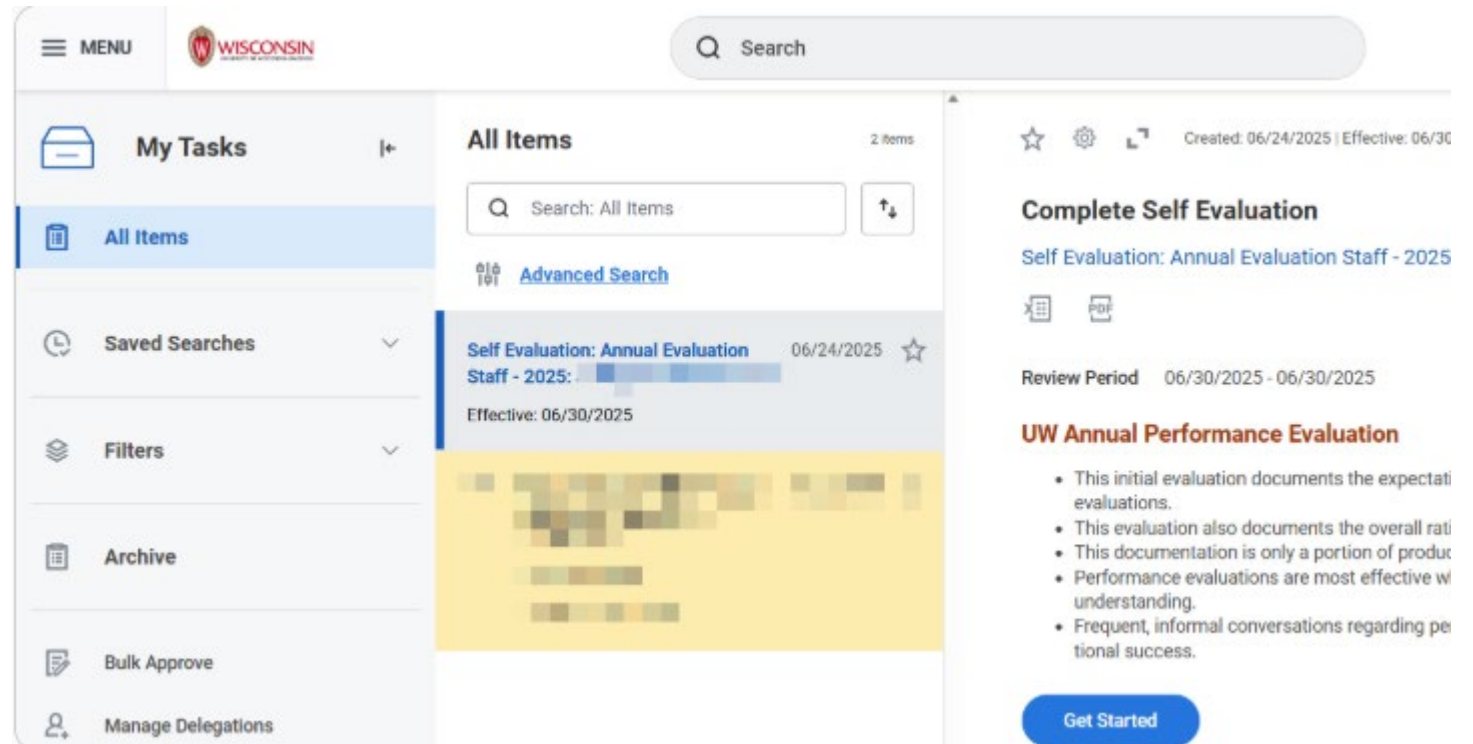




Employee Actions

- **Step 1: Open Self Evaluation**

- Navigate to your Tasks and select, "Self Evaluation: Annual Evaluation Staff - 2025:<YOUR NAME>."





Employee Actions

- **Step 2: Review Responsibilities**

- Read and review the Job Responsibilities set by your Manager. Contact your manager if the information is incorrect.
- Once you have reviewed all the information, select "Next" to continue.



Employee Actions

- **Step 3: Review Goals**

- Read and review the Goals you have previously discussed with your manager. These should match those listed in your FY25 performance evaluation. Contact your manager if the information is incorrect.
- Select, "Next" once you have completed your review.



Employee Actions

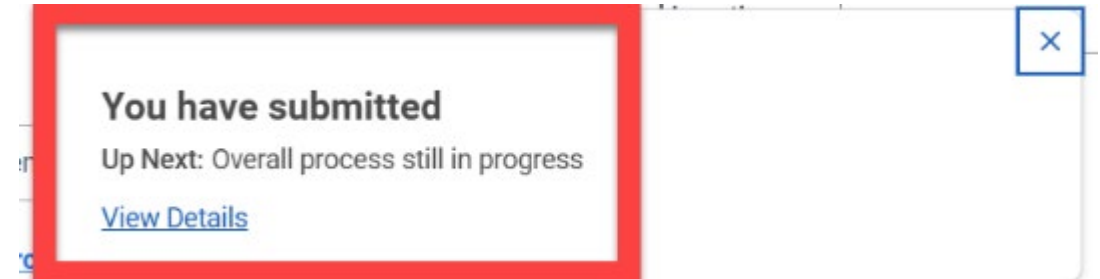
- **Step 4: Finalize all information.**
 - Review all items and verify that they are complete and accurate.
 - Select "Submit" when you are done.



Employee Actions

- **Step 5: Confirm Submission.**

- A pop-up notification will appear that reads, "You have submitted. Up next: Overall process still in progress."
- The Performance Evaluation has been returned to the Manager. It is recommended that the employee contact their manager directly to inform them that the evaluation is in Workday and is ready for review.





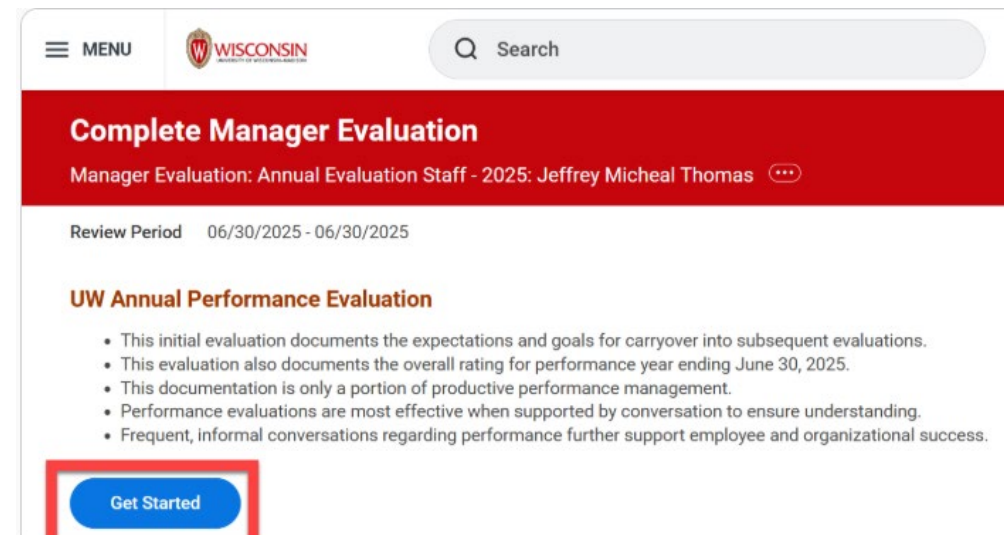
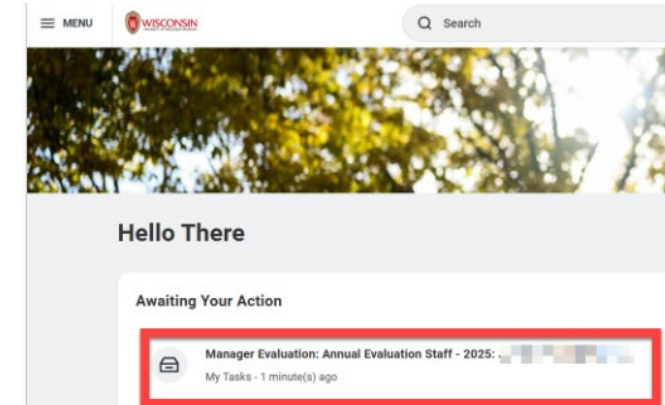
Next Step: Back to Manager





Manager Actions to Rate Employee(s)

- **Step 1: Engage with assigned task.**
 - Open your assigned task: "Manager Evaluation: Annual Evaluation Staff - 2025."
 - Select, "Get Started."





Manager Actions to Rate Employee(s)

- **Step 2: Review and Acknowledge Responsibilities.**

- From the drop-down menu, select: "The responsibilities have been updated as needed for this position." If additional edits are needed, speak with the employee about the changes you make. **Important:** In 2025, you will not rate each individual responsibility; instead, you simply acknowledge that it is accurate. In future reviews, you will enter a rating for each responsibility.
- Select "Next" when complete.



Manager Actions to Rate Employee(s)

- **Step 3: Review and Confirm Goals.**

- Review Goals. If additional edits are needed, speak with the employee about the changes you make.
- Select "Next" when complete.

The screenshot displays the 'Complete Manager Evaluation' interface for Jeffrey Micheal Thomas, dated 06/30/2025. The left sidebar shows a progress indicator with '2026 Goals' highlighted. The main content area is titled 'Review Goals' and includes instructions: 'Do not make changes to goals that are shown unless discussed with employee.' and 'Click Next to continue.' Below this, there are input fields for 'Goal' (containing 'ABC') and 'Description'. A dropdown menu for 'Due Date' is open, showing options: 'select one', 'Not Started', 'In Progress', 'Completed', and 'select one'. At the bottom, there are buttons for 'Back', 'Next', 'Save', and a menu icon.



Manager Actions to Rate Employee(s)

- **Step 4: Upload FY25 Performance Evaluation into Workday.**
 - This step is optional but highly encouraged for future documentation.
 - Select, "Add" to upload your saved PDF copy of the FY25 performance evaluation.
 - Select "Next" when the document is uploaded.



Manager Actions to Rate Employee(s)

- **Step 5 (Optional): Overall Evaluation and Rating for non-Primary Job**
 - Feedback received from a non-Primary supervisor will appear at this point in the performance review cycle.
 - Note: If you complete the evaluation before feedback from a non-Primary supervisor has been received, that feedback will not be delivered at any point. Check-in with your employee if and when Feedback has been requested.

2025 Overall Evaluation and Rating for Non-primary Job

2025 Overall Rating for Non-primary Job(s)

Feedback for any non-primary job(s) will appear here.

- This information is for reporting purposes and should not influence the overall rating of the primary job.
- You cannot make changes.

The section will remain blank in the following circumstances:

- The employee only has one job.
- The employee failed to request feedback from the non-primary job manager(s).
- The manager of the non-primary job(s) did not respond to the request for feedback.



Manager Actions to Rate Employee(s)

- **Step 6: Select Rating.**

- If you previously used PMDP, the rating you select must match the rating assigned in PMDP. If you did not use PMDP, you must select a rating that most closely reflects the FY25 rating for the employee.
- Once you have selected the appropriate rating, save the form by selecting the check mark .
- Select "Next" to continue.



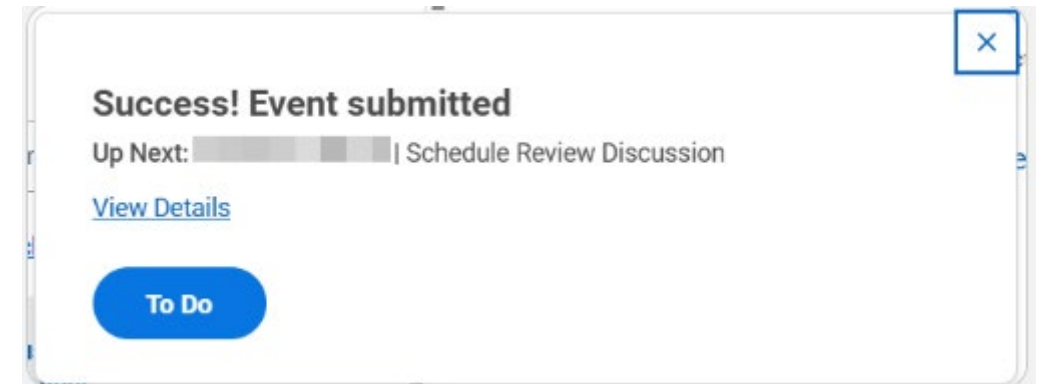
Manager Actions to Rate Employee(s)

- **Step 7: Review all evaluation information.**
 - Review the Responsibilities, Goals, and Ratings for the employee.
 - **Recommendation:** This is the LAST opportunity you have to make any edits to the employee's performance evaluation. It is recommended that you skip to Step 7 PRIOR to selecting "Submit." After your conversation, return to this step.
 - Once verified, select, "Submit." A pop-up notification will appear that reads, "Success! Event Submitted."



Manager Actions to Rate Employee(s)

- **Step 8: Schedule a conversation with your employee.**
 - A "To Do" reminder will appear to encourage you to schedule a meeting to discuss the evaluation with your employee.
 - Select "Submit" to route the complete evaluation back to the employee.





Next Step: After employee and manager discussion

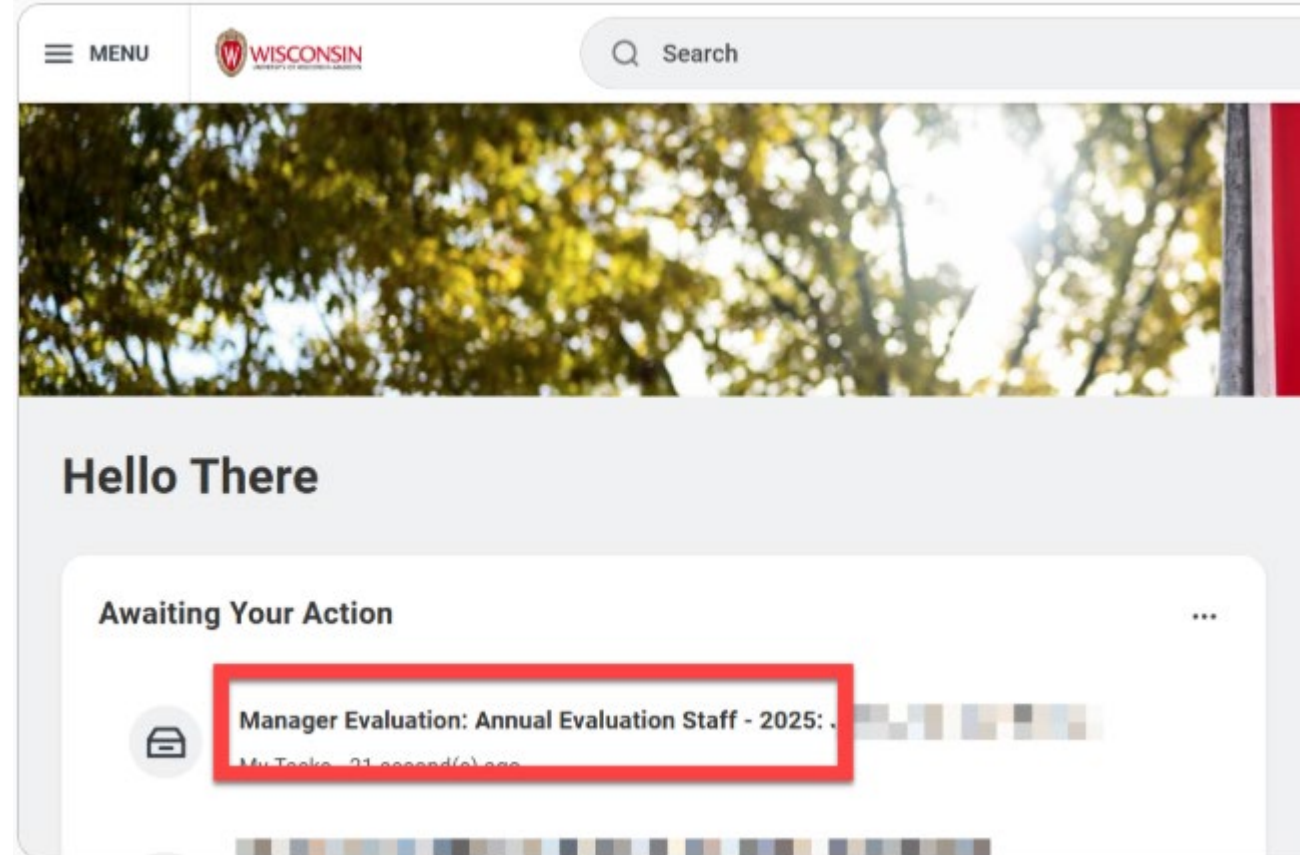
Once the Manager has completed all the tasks in Part 3, including the individual conversation, the workflow returns to the Employee for review and acknowledgment.





Employee Receives Complete Evaluation from Manager

- **Step 1: Engage with assigned task.**
 - Open your assigned task:
"Manager Evaluation: Annual Evaluation Staff - 2025: <YOUR NAME.>"





Employee Receives Complete Evaluation from Manager

- **Step 2: Review all information in the evaluation.**
 - Review and verify all information contained in the evaluation. You will not be able to make changes at this point.
 - Select, "Next."



Employee Receives Complete Evaluation from Manager

- **Step 3: Acknowledge your evaluation.**
 - You are required to acknowledge receipt of your performance evaluation.
 - From the drop-down menu, select, "I acknowledge I have received this performance evaluation information."
 - Select "Submit."
 - A pop-up notification will appear and indicates that your manager has been informed of this stage in the process.

Provide Employee Review |+

Comments

Manager Evaluation: Annual
Evaluation Staff - 2025:

Actions

06/30/2025 - 06/30/2025
Evaluated By:

Summary

Acknowledgement

Acknowledgement

Employee

Status * Search

Comment ☐ I acknowledge I have received this performance evaluation information.

Process History

3 minutes ago
Complete Manager Evaluation for Performance Review- Submitted

Submit Save for Later



Next Step: Manager finalization

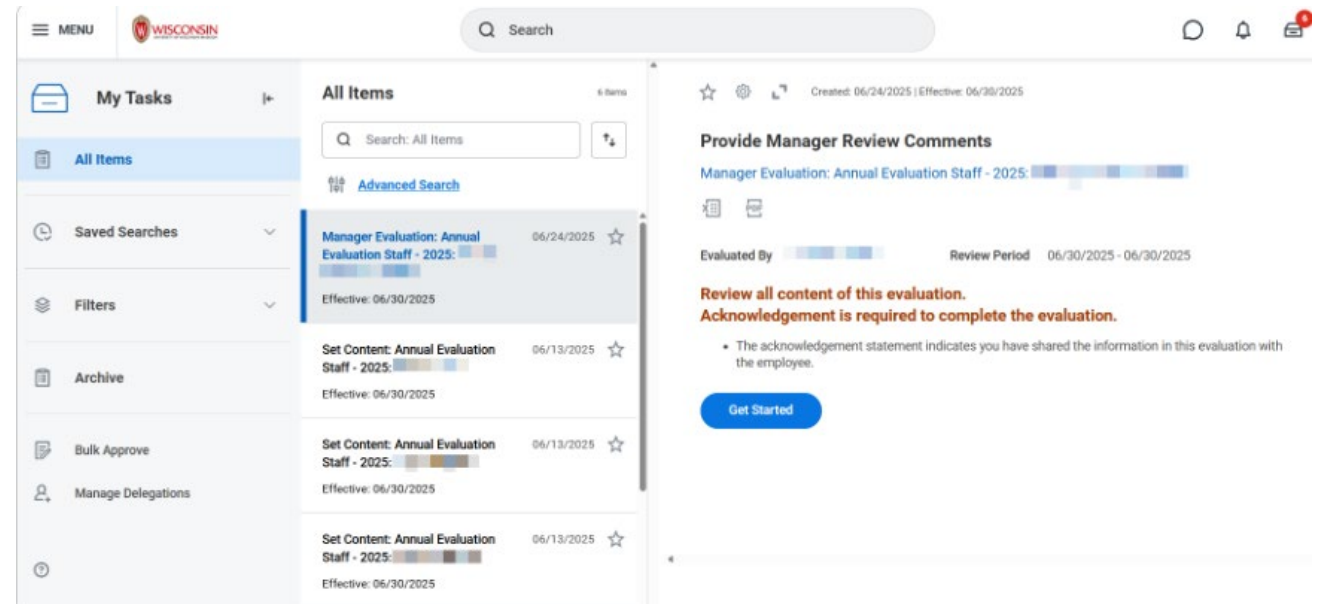
After an employee completes their final review and acknowledgment, the workflow returns to the Manager for final submission.





Manager Completes Evaluation After Employee Acknowledgment

- **Step 1: Engage with assigned task.**
 - Open your assigned task: "Manager Evaluation: Annual Evaluation Staff - 2025: <EMPLOYEE NAME>."
 - Select, "Get Started."





Manager Completes Evaluation After Employee Acknowledgment

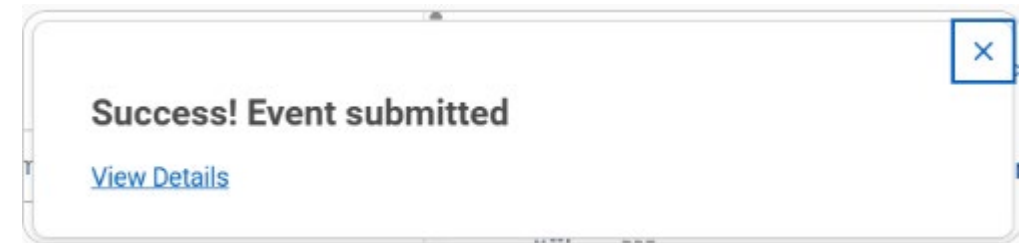
- **Step 2: Review and Acknowledge Responsibilities.**
 - Review all information from the evaluation.
 - Once verified, select "Next."

The screenshot displays the 'Provide Manager Review' interface in Workday. The left sidebar shows the 'Acknowledgement' step as the active tab. The main content area is titled '2025 Overall Evaluation and Rating for Non-primary Job'. It includes a 'Comments' section with a 'Manager Evaluation: Annual Evaluation Staff - 2025:' and a date range of '06/30/2025 - 06/30/2025'. Below this, there are two tabs: 'Summary' and 'Acknowledgement'. The 'Acknowledgement' tab is selected, showing a 'Manager' section with a 'Status' field (marked with a red asterisk) and a 'Comment' field. The 'Status' field contains the text 'I acknowledge I have shared this X performance evaluation with the employee.' and the 'Comment' field contains 'ABCD'. Below the 'Manager' section is a 'Process History' section showing a list of steps: 'Complete Manager Evaluation for Performance Review- Submitted' (6 minutes ago), 'To Do: Schedule Review Discussion- Step Completed' (5 minutes ago), and 'Provide Employee Review Comments- Submitted' (2 minutes ago). At the bottom, there are 'Submit' and 'Save for Later' buttons. A red box highlights the 'Next' button in the bottom right corner of the interface.



Manager Completes Evaluation After Employee Acknowledgment

- **Step 3: Finalize and Complete the Performance Evaluation.**
 - Select "Submit." A pop-up notification will appear that reads, "Success! Event submitted."
 - The performance evaluation process is now complete.



Evaluation has been finalized

Next step would be the mid point evaluation in early 2026.



A wide-angle photograph of a modern, open-plan lounge or common area. The room is characterized by large, floor-to-ceiling windows that offer a view of a city street with trees and buildings. The interior is furnished with contemporary decor, including dark leather armchairs, a long wooden coffee table, and a red sofa. Several people are present: a man in the foreground is seated and looking at his phone; a man in a black shirt and shorts is walking across the room; and other individuals are seated in the background. The lighting is bright, coming from the natural light through the windows.

Questions?



Thank you!



