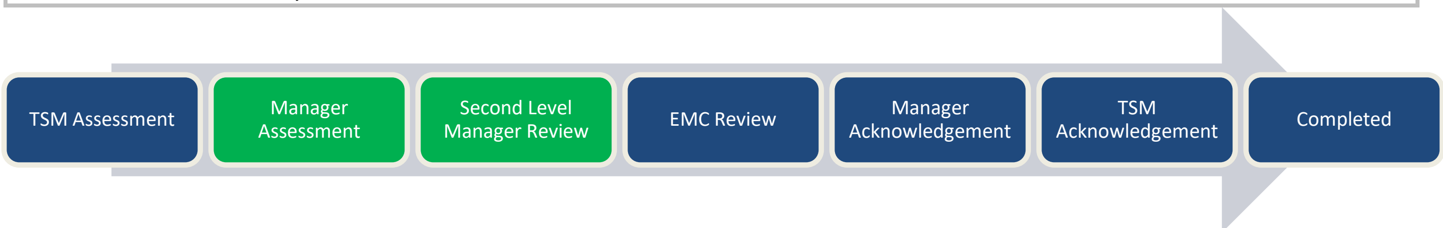
Standard Performance Appraisal with Team Schein Incentive Plan (TSIP) – Manager Assessment

When to Use This Guide

Use this document to guide you through completing the Performance Appraisal with Individual Goals (MBO) on the Team Schein Incentive Plan for your TSMs.



Manager Assessment Step: Completing the Performance Appraisal and Individual Goal Assessment

1. Please monitor your e-mail for a notification that your TSM has sent forward their Performance Appraisal and Individual Goal (MBO) form, then access your Workday 'My Tasks'
2. Locate the Performance Appraisal form for your TSM and select **Get Started**
3. For each Performance Factor, enter a rating by clicking into the Rating box and selecting a response
4. Click **Next**
5. View the TSM's Self-Assessment
6. Enter your Overall Comment in the **Answer** text box
7. Click **Next**
8. Review the TSMs' Individual Goals (MBO) and access the Team Schein Incentive Plan Summary document to familiarize yourself with the plan (there is a link at the top of the page to the document)
9. Enter a Rating and a comment for each listed goal.
    a. When rating the TSM, keep in mind that there is a payout calculation associated with each goal *(see below; the full calculation table is in Appendix A of the Team Schein Incentive Plan Summary).*

Individual Goal Achievement %	Calculated Rating % or Payout%
69%	0%
70%	50%
71%	52.5%
72%	55%
80%	75%
81%	76.5%
82%	78%

Individual Goal Achievement %	Calculated Rating % or Payout%
90%	90%
91%	91%
92%	92%
100%	100%
105%	105%
115%	115%
116%	115%

10. To see the in-progress comments for each goal, click the **Conversation Icon**
    a. You can copy and paste your in-progress comments into the Comment box for each goal if desired
11. When finished with your Individual Goal ratings/comments, click **Next**
12. Review your complete Manager Assessment
13. Click **Submit** for the First Level Manager and **Approve** for the Second Level Manager
14. Once successfully submitted, it will route to <u>your</u> manager for approval. If you are a Second Level Manager, it will route to the EMC Review step.

a. As second level manager, follow the same steps as the manager. You can edit any ratings the First Level Manager has entered. However, please note that when adding your comments, you should not erase any of the First Level Manager's comments. Please indicate it is your comments by adding your name next to them

Sending Back a Performance Appraisal and Individual Goal Form

1. Access your Workday tasks and locate the Performance Appraisal and Individual Goal form for your TSM
2. Click **Get Started**
3. Click **Next** until you see the **Send Back** button
4. Click **Send Back**
5. Enter the TSM's name
6. Enter a **Reason**
7. Click **Submit**

NOTE: TSMs will NOT see Manager comments if the form is sent back in this step.

Reporting and Dashboards

1. Click on **Team Performance** from your Workday homepage. Review each tab and the commonly run reports for each area. Below is an example of the different reports you can use within the dashboard:

Activity	Select this Report/Dashboard
To view the Status of Team's Performance Appraisals and Individual Goal (MBO) Assessment	**RPT Year End Outstanding Form Status Summary** *(you can drill into the report to see details on what forms are outstanding and who needs to take action)*
To review the Performance Distribution for your team	**RPT Ratings Distribution**
To review the Average Individual (MBO) Goal rating for your team	**RPT Average Goal Rating**
To review goal ratings for your TSMs	**RPT All Goals with Ratings**

Planning merit increases for your team is the next step in the process. Merit Planning begins in mid-January. Refer to Merit for Managers QRG for more details.

Tips!

Workday Recovery Assistant!

If you accidentally click out of a Performance Appraisal before completing it or you get distracted while completing one and Workday logs you out, Workday will save the Performance Appraisal for you so you can pick up from where you last left off. To access the Recovery Assistant, click on the picture in the upper righthand corner, then click "Recovery Assistant" (this will not show if there is nothing to be recovered). Click on the option that has the most recent transaction and it will bring you to back to the form you were completing.

My Tasks Filters!

Workday allows you to filter what's in your tasks to make it easier to find what you need to complete. Click on your Workday 'My Tasks' and click on the "Advanced Search" option. A side bar will show you your options. If you click on Performance Appraisals, your tasks will filter to only the Performance Appraisal tasks you need to complete. If you click on Goal Setting, then your tasks will filter to only the goal setting tasks you need to complete.