

When to Use This Guide

Use this document to guide you through completing the Performance Appraisal form for your TSMs.



Manager Assessment Step: Completing the Performance Appraisal

1. Please monitor your e-mail for a notification that your TSM has sent forward their Performance Appraisal form, then access your Workday ‘My Tasks’
2. Locate the Performance Appraisal form for your TSM
3. Click **Get Started**
4. For each Performance Factor, enter a rating by clicking into the rating boxes in the table for each
5. Click **Next**
6. View the TSM’s Self Assessment
7. Enter your Manager Assessment in the **Answer** text box
8. Click **Next**
9. Review your complete Manager Assessment
10. Click **Submit** for the First Level Manager and **Approve** for the Second Level Manager
11. Once successfully submitted, it will route to your 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 have the ability to edit any ratings the First Level Manager has entered. However, please note that when adding your comments, you should not erase any of the previous manager’s comments. Please indicate it is your comments by adding your name next to them

Sending Back a Performance Appraisal

1. Access your Workday ‘My Tasks’ and locate the performance appraisal 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 the **Menu** and select **Team Performance**, then select one of the following reports from the Year End Performance tab:

Activity	Select this Report/Dashboard
To view the Status of Team’s Performance Appraisals	RPT Year End Outstanding Form Status Summary <i>(you can drill into the report to see details on what forms are outstanding and who needs to take action)</i>
To review the Performance Distribution for your team	RPT Ratings Distribution

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.