

# Performance Review Process

**The Performance Review Process** is the central component of Administrators, Sergeants and Supervisors' annual review. This process requires discussion about goals for the fiscal year (July 1 - June 30) and provides a framework for mid-year feedback as well as a year-end final review. A key objective of the review is communication about accomplishments, goals, and professional development, in addition to creating a record of an employee's overall performance.

## Goal Setting: July 1 – July 31

### Employee Process

At the beginning of the fiscal year, set goals for the upcoming year.

- 1) Find the Review in your *Workday Inbox* after Human Resources initiates the process.
- 2) Click the *Get Started* button. [Screenshot A]
- 3) Enter your goals. [Screenshot B]
  - a. Click *Add* to add a new goal.
  - b. Describe your goals.
    - i. Note the *Goal Title*.
    - ii. Write a brief *Goal Description*.
  - c. Populate the *Goal Status* by using the dropdown menu. This is a required field and will result in an error message if left blank.
  - d. To delete a goal, click *Remove*.
  - e. Click *Next*.
- 4) Review your goals and select your next step:
  - Edit Goals: Click *Goals* on the left blue bar to edit your goals. [Screenshot D]
  - Save Review for Later: Click *Save for Later* to save your entries. The Review will be available in your Workday Inbox for when you're ready to re-open, edit and submit your goals. Go to Step 1.
  - Print Review: To print the Review, click the *printer icon* on the left blue bar. [Screenshot D]
  - Submit Review: When your goals are complete, click *Submit* and your Review will route to your Manager for approval. If submission is successful, you'll receive a "Success! Event Submitted" message. Click *Done*. [Screenshot C]
- 5) After submission, schedule a meeting with your Manager to discuss your goals together. *Please note that a meeting is required for the goal setting process.*
- 6) In the event that your goals are sent back to you by your Manager, you'll receive a notification via email and the Review will appear in your Workday Inbox.
  - a. Click *Get Started* [Screenshot A].
  - b. Select *Review and Submit* on the left blue bar [Screenshot D].
  - c. Scroll down to the Process History section to read your Manager's comment [Screenshot F].
  - d. Click *Goals* on the left blue bar to edit your goals. [Screenshot D]
  - e. Go to Step 3.

- 7) Once your Review is approved by your Manager, you'll receive a Workday notification that confirms your Manager's approval.

**Due Date:** Goals must be submitted and approved in Workday by July 31. If needed, your goals can be edited at the Mid-Year Goal Review in December.

**Employee Performance App:** On your Workday home screen, click the [Performance](#) icon.

[Screenshot I]

Under the [View](#) column, select [Reviews](#). This will display your completed, in-progress and canceled reviews.

- a. To see a Review in Workday, click the [View](#) button.
- b. To save or print an official copy of your Review, click the [Create New PDF](#) button. The PDF becomes available under Notifications in Workday. [Screenshot H]

## Manager Process

At the beginning of the fiscal year, set goals with the Employee for the upcoming year.

- 1) Find the Review in your [Workday Inbox](#) after the Employee submits it to you.
- 2) Click the [Get Started](#) button. [Screenshot A]
- 3) Review the Employee's goals in Workday and meet with the Employee to discuss. *Please note that a meeting is required for the goal setting process.*

In Workday, select your next step:

Print Review: Click the [printer icon](#) on the left blue bar. [Screenshot G]

Save Review for Later: Click the [Vassar logo](#) in the left corner to exit the Review. The Review will be available in your Workday Inbox for when you're ready to re-open the goals. Go to Step 1.

Send Back Goals to be Edited: Click [Send Back](#) and specify a reason in the comment box [Screenshot E]. The Review will route back to the Employee for edit and re-submission. You'll receive an "Event sent back" message. Click [Done](#).

Approve the Goals: After meeting with the Employee, click [Approve](#). If approval is successful, you'll receive a "Success! Event approved" message. Click [Done](#).

**Due Date:** Employee's goals must be submitted and approved in Workday by July 31. If needed, the Employee's goals can be edited at the Mid-Year Goal Review in December.

**Manager Performance App:** On your Workday home screen, click the [Team Performance](#) icon. [Screenshot H]

Select [My Team's Performance Reviews](#). This will display your teams completed, in-progress and canceled reviews.

To see an Employee's Review in Workday, click the [\[...\]](#) near the Employee's name, choose [Talent](#) and then select [View Employee Reviews](#). [Screenshot J]

- a. To see a Review in Workday, click the [View](#) button.
- b. To save or print an official copy of the Employee's Review, click the [Create New PDF](#) button. The PDF becomes available under Notifications in Workday. [Screenshot I]

## Screenshots

Screenshot A:

### Complete Self Evaluation

Self Evaluation: 2021-2022 Beginning Year Goal Setting

Review Period 07/01/2021 - 06/30/2022

[Set Goals for Performance Review Period](#)

At the beginning of the fiscal year, describe your goals for the goals.

[Manager](#): Click 'Get Started' to view the employee's goals.

[Get Started](#)

Screenshot B:

Goal Title \*  Normal

Goal Description  Normal

Goal Status

[Remove](#)

[Add](#)

Screenshot C:

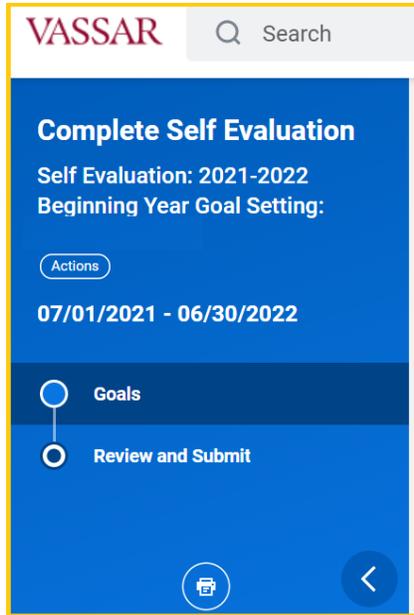
VASSAR

**Success! Event submitted**

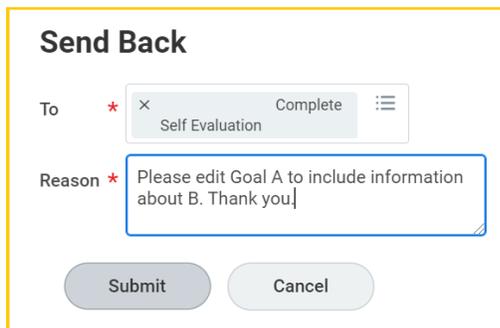
**Up Next**

 Approval by Manager

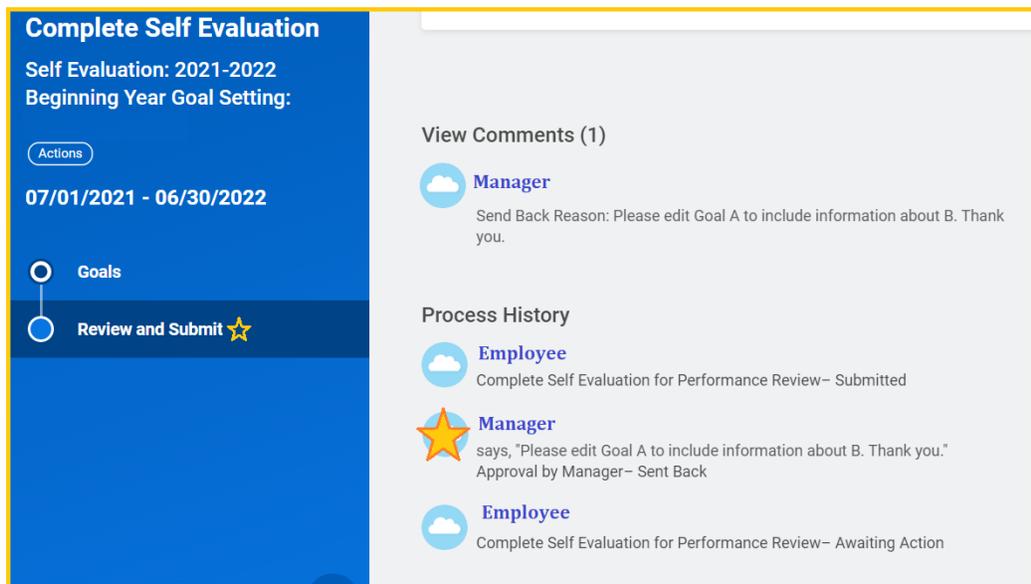
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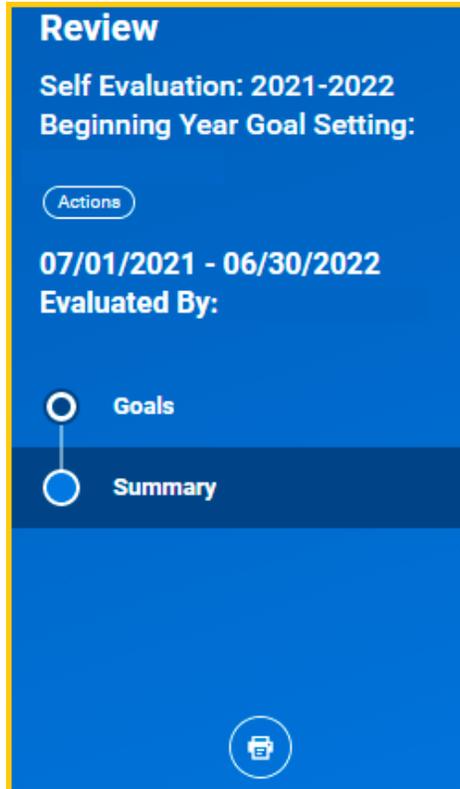
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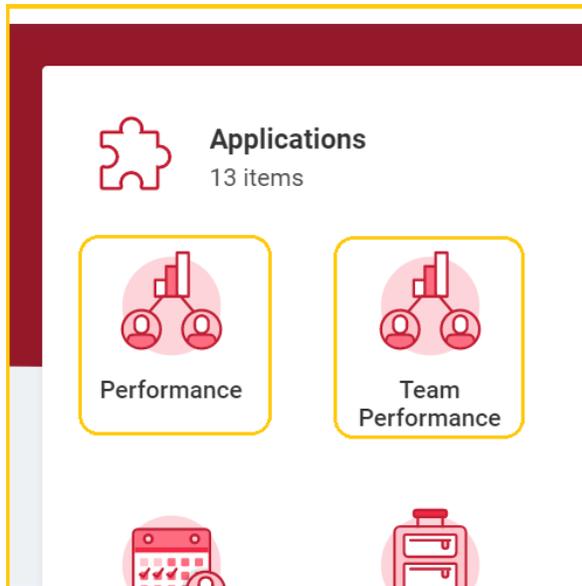
Screenshot F:



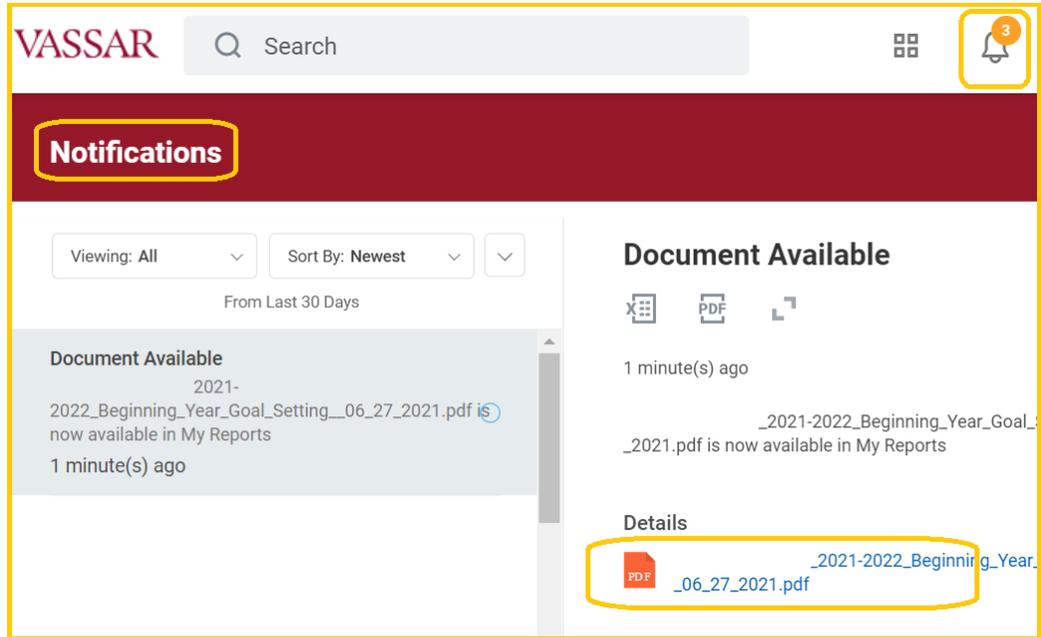
Screenshot G:



Screenshot H:



Screenshot I:



Screenshot J:

