

Performance Review: Completing the Manager Review

The **performance review** is part of the [Employee Feedback Cycle](#) completed annually to evaluate overall performance, identify strengths, development opportunities and receive feedback from the employee's manager.

Geisinger's performance review process includes a self-evaluation and manager review, resulting in one overall rating that is discussed and acknowledged by both parties. Employees and managers rate and provide comments in areas such as Geisinger Values, Geisinger Competencies, job responsibilities and goal progress.



Note: If you are a manager and completing your own Self-Evaluation, refer to the [Self-Evaluation job aid](#) instead.

There are four steps in the Performance Review process:

Step 1: [Employee writes Self-Evaluation](#)

Step 2: [Manager writes employee's Performance Review & meets with the employee](#)

Step 3: [Employee writes final comments & Acknowledges Performance Review](#)

Step 4: [Manager writes final comments & Acknowledges the Performance Review](#)

NAVIGATION TIPS

Back – saves and moves to the previous section

Back

Next – saves and moves to the next section

Next

Saves – saves any recently entered information

Save

Close – closes the review and discards any unsaved changes

Close

Submit – finalizes and moves the form to the next step in the process

Submit

*Need help? Click on our **Smart Tips** icons for assistance throughout the form*



For Rating Instructions

EMPLOYEE WRITES THE SELF-EVALUATION (STEP 1)

- If you're requiring a self-evaluation, share the completion timeline with your employees to ensure you have time to finalize your portion of the review.
- **YOU ARE UNABLE TO BEGIN** the employee's performance review until the employee's self-evaluation is completed.
- If you **are not requiring your employee to complete a self-evaluation**, refer to the **Manually Advance a Performance Review** section of the [Manage](#)

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[Performance Review Tasks - Manager](#) job aid for instructions on how to move the form forward.



Note: Any **self-evaluations not completed by a designated date** (refer to the [Employee Feedback Cycle](#) SharePoint site for specifics), will be **moved forward** to the manager step. If your **employee needs to complete the self-evaluation after this date**, refer to the **Send Back a Self-Evaluation to an Employee** section of the [Manage Performance Review Tasks - Manager](#) job aid to return the form to the employee.

MANAGER WRITES EMPLOYEE'S PERFORMANCE REVIEW (STEP 2)

Once the employee submits the self-evaluation (or the self-evaluation is moved forward), you will receive a **task** in your **Workday inbox** for a **Complete Manager Evaluation task**



Note: Any comments/ratings completed by the employee during the self-evaluation steps will be included in the form.

1. Select the **Complete Manager Evaluation** task in your Workday inbox.

2. Click on  button to begin the review.



Note: if your employee receives feedback in Workday during the performance period, it will appear when you begin the review. You can also access it through the navigation menu. To download the feedback summary to Excel, click the  then the gear icon.

3. Complete the **Geisinger Values and Corporate Compliance** section by selecting a rating for each item.

4. Use the **Comment** box to summarize your employee's key strengths and opportunity areas demonstrated during the performance period. *If **Corporate Compliance** is rated **Partially Meets or Doesn't Meet**, comments are required to support the rating.*

5. Click **Next**.

6. Complete the **Geisinger Competencies** section by selecting a rating for each item listed.

- a. The rating should reflect the demonstration of the expected behaviors for each competency based on the **Stage of Contribution**:

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- i. [Stage 1 Contribution: Contributes Dependently](#) (Employees in job profiles not requiring licensure, certification, or a degree)
 - ii. [Stage 2 Contribution: Contributes Independently](#) (Employees in job profiles requiring licensure, certification, or a degree)
 - iii. [Stage 3 Contribution: Contributes through Others](#) (Titles: Supervisor, Manager, Director, and Senior Director)
 - iv. [Stage 4 Contribution: Contributes Strategically](#) (Titles: AVP/Medical Executive, VP/Institute Chair, C-Level Executive, EVP, and CEO)
7. Use the **Comment** box to highlight key strengths and areas for growth demonstrated during the performance period. **Comments are required.**
8. Click **Next**.



Note: For **Research and Faculty reviews** the next two sections are different. Click [here](#) for details about the Research review or [here](#) for the Faculty review. **For all other forms, go to Step 9.**

9. Complete the Job Responsibilities Sections:



Note: Only **ONE** of the Job Responsibilities sections needs to be completed (Comments or Attachment).

Comments continue to [step 9a](#); **Attachment** proceed to [step 9b](#).

- a. Job Responsibilities Comments:

- i. **Review your employee's comments** (if applicable) and in the Answer box, provide a summary of your employee's accomplishments and areas of needed improvement.
- ii. Click **Next**.
- iii. Click **Next** a second time through the Job Responsibilities Attachment section and proceed to [step 10](#).

OR

- b. Job Responsibilities Attachment:

- i. Click **Next** to bypass the Job Responsibilities Comments section.
- ii. **Review the employee's summary** outlining their accomplishments and areas of improvement needed (if applicable). You can **also attach a summary** of your employee's accomplishments and areas of improvement needed.
- iii. Click **Select Files** button or drag-and-drop to the **Drop files here** space to attach their accomplishments and areas of needed improvement. *File Formats: MS Word, MS Excel, or PDF file.*
- iv. Click **Next**.

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10. Updating Goals:

a. Goals are **pre-populated**:

- i. Confirm the **Goal** title, **Description**, **Category** (Strategic Priority) and **Status** are accurate and make any required edits.
- ii. Optional: Add **Manager Comments** to share any feedback regarding the employee's goal achievement.

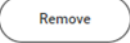
b. Goals created in Workday **did not transfer** to the employee's review:

- i. Click the Add button.
- ii. Click the List icon  in the Add Existing field and select an existing goal to import into the review.
- iii. Once the goal transfers, make any required updates to the **Goal** title, **Description**, **Category** (Strategic Priority), **Status**, **Dates**, and **Comments** as needed.

c. **Create Goals** for the review:

- i. Use the **Add** button.
- ii. **Complete all sections** for each added goal.

d. **Remove Goals** that no longer apply to the role or were added in error:

- i. Use the  button below the goal to permanently delete the goal from your self-evaluation.

11. Next Year's Goals section: This section is **OPTIONAL** and can capture goals for the **upcoming calendar year**. This section is for planning purposes should not be part of the rating for the current review process.

- a. For goals added by your employee, confirm the **Goal** title, **Description**, **Category** (Strategic Priority) and **Status** are accurate and make any required edits.



Note: Ensure you are selecting a Category (Strategic Priority) for the **next calendar year**.

- b. The Status and Comment fields are not required for these future goals and can be skipped

12. Click **Next**.

13. Overall section:

- a. Select a **Rating** and add a **Comment** to support the overall rating. For additional details about the Rating Scale, click [here](#).

14. Click **Next**.

15. Use the **Review and Summary** screen to confirm accuracy and completeness of the review.

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16. From the **Review and Summary** screen you can:

- a. Save for Later:** Use this option to save changes and return to the review later and until you've had the performance conversation with your employee.
- b. Submit:** Only submit the review after discussing it with your employee. Once submitted, the review moves to the next step (Employee Acknowledgement), and no further edits can be made.

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EMPLOYEE WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW (STEP 3)

Once returned to the employee, they need to Acknowledge the performance review discussion and add any final comments.

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MANAGER WRITES FINAL COMMENTS AND ACKNOWLEDGES THE PERFORMANCE REVIEW (STEP 4)

When the employee has completed their Acknowledgement and submitted the form, it will route back to you for final Acknowledgement.

- 1.** Click the Acknowledgement task in your Workday inbox.
- 2.** Click  button.
- 3.** The **Summary** section provides a side-by-side view of both the self- and manager evaluation. This is a final version of the review and no additional changes may be made.
- 4.** Click **Next**.
- 5.** Select the List icon  in the Status field.
- 6.** Select the **Manager's Signature** statement.
- 7.** Use the **Comment** box to provide any final comments.
- 8.** Click **Submit**.
- 9.** The performance review is now successfully completed.

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RESEARCH REVIEWS ONLY: QUESTIONS & SUPPORTING DOCUMENTATION

- 1.** Review your employee's responses to the questions and provide your comments in the manager's **Answer** box.

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2. Click **Next**.
3. Review the Supporting Document uploaded by the employee.
4. Click **Next**.
5. Go to [Step 10 above](#) to continue the review.

FACULTY REVIEWS ONLY: QUESTIONS & SUPPORTING DOCUMENTATION

6. Review your employee's responses to the questions (if applicable) and provide your comments in the **Answer** text box.
7. Click **Next**.
8. Review the **Job Responsibilities and/or Faculty Attachment** added by the employee.
9. Click **Next**.
10. Go to [Step 10 above](#) to continue the review.

APPENDIX:

Rating Scale & Definition:

Rating	Definition
Exceptional Performance	Demonstrated performance consistently exceeded the standard results and/or competencies expected for the position and the quality of work was superior and made an exceptional or unique contribution in support of team, department, or organizational objectives. Employee is sought out as a resource by others due to expertise and the quality and quantity of the work is easily recognized as exceptional .
Exceeding Expectations	Demonstrated performance consistently met and occasionally exceeded the results and/or competencies expected for the position and the quality of work was at times above expected levels of performance. The employee consistently contributed to the success of the team, department and/or organization.
Meeting Expectations	Demonstrated performance effectively and consistently achieves the results and/or competencies expected for the position and the overall level of performance meets all position requirements. (This is the expected performance level for an employee in the position.)
Developing in Position	Unable to provide a full assessment of all aspects of the current position or demonstrated performance was inconsistent in achieving results and/or competencies for the position but working towards acquiring the necessary skills and knowledge. (Rating intended for current employees who transitioned into a new role within the last 6 to 12 months.)

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Underperforming in Position	Demonstrated performance did not achieve the results and/or competencies expected for the position and/or reasonable progress toward performance improvement goals was not made. A plan to improve performance , including timelines, must be outlined and monitored to measure progress.
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