

Performance Review: Completing the Self-Evaluation

The **performance review** is part of the [Employee Feedback Cycle](#) completed annually to evaluate an employee's overall performance, identify strengths, development opportunities and provide feedback from the 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. The review includes areas such as Geisinger Values, Geisinger Competencies, job responsibilities and goal progress.

There are four steps to the **Performance Review**:

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

Step 2: Manager Evaluation of Performance & Meets with Employee

Step 3: [Employee Acknowledgement & Final Comments](#)

Step 4: Manager Acknowledgment & Final Comments



Note: Check with your manager to confirm if a self-evaluation is required and their deadline.

NAVIGATION TIPS

Back – saves and moves to the previous section

Next – saves and moves to the next section

Saves – saves any recently entered information

Close – closes the review and discards any unsaved changes

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

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

Back

Next



Save

Close

Submit



For Rating Instructions

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COMPLETE SELF-EVALUATION (STEP 1)

1. Select the **Complete Self Evaluation** task in your Workday inbox.
2. Click  button to begin the evaluation.



Note: A navigation menu on the left outlines each section of the review.

3. Complete the **Geisinger Values and Corporate Compliance** section by selecting a **rating** for each item listed and use the **Comment** box to highlight key strengths and opportunities for growth demonstrated during the performance period. Comments are required.
 4. Click **Next**.
 5. 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**:
 - 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)
 6. Use the **Comment** box to highlight key strengths and areas for growth demonstrated during the performance period. **Comments are required**.
 7. Click **Next**.
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- 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 8.**

- 8. Complete only **ONE** of the **Job Responsibilities** sections. For **Comments** refer to [step 8a](#); **Attachments** refer to [step 8b](#).
- 
- Geisinger
- Your screens and processes may vary from this document.
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a. Job Responsibilities Comments section:

- i. Use the **Comment** box to summarize your accomplishments and areas of needed improvement based on job specific responsibilities.
- ii. Click **Next**.
- iii. Click **Next** a second time through the Job Responsibilities Attachment section and proceed to [step 9](#).

OR

b. Job Responsibilities Attachment section:

- i. Click **Next** to bypass the Job Responsibilities Comments section.
- ii. To attach your external file, either drag and “**Drop files here,**” or click the “**Select files**” button.
File Formats: MS Word, MS Excel, or PDF file.
- iii. Click **Next**.

9. This Year’s Goals section

a. Goals are pre-populated:

- i. Review the **Goal** title, **Description**, **Category** (Strategic Priority) and Status and make any required edits. If the **Status is Completed**, a “**Completed on**” date is required.
- ii. **Optional:** use the **Comments** to provide a summary of your results or details about why you did not complete the goal.

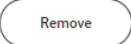
b. Goals created in Workday did not transfer to the self-evaluation

- i. Click the **Add** button.
- ii. Click the **List** icon  in the **Add Existing** field and select an existing goal to import into your self-evaluation (there are several options allowing you to search for goals)
- 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 your self-evaluation:

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

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

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

10. Click **Next**.

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

- a. Click the **Add** button
- b. Add the Goal title, Description and Category (Strategic Priority)



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

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

12. Overall section:

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

13. Click **Next**.

14. Use the **Review and Submit section** to confirm the accuracy and completeness of your self-evaluation.

15. Click **Submit**.



Note: Once you submit, the performance review routes to your manager and can no longer be edited by the employee.

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EMPLOYEE ACKNOWLEDGES & FINAL COMMENTS *(STEP 3)*

- 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 your Performance Review, and no additional changes may be made.
- 4. Click **Next**.
- 5. Select the **List** icon  in the **Status** field.
- 6. Select the **Employee's Signature** statement.
- 7. Use the **Comment** box to provide any final comments.
- 8. Click **Submit**.

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Note: Once you submit your acknowledgement, it will route to your manager to complete the same acknowledgement step. A finalized version of your Performance Review be in Workday.

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RESEARCH REVIEWS ONLY: QUESTIONS & SUPPORTING DOCUMENTATION

1. Complete the **Questions** section of the self-evaluation:
 - a. Provide a response to each question in the **Answer** text box.
 - b. Click **Next**.
2. Complete the **Supporting Document** section of the self-evaluation:
 - a. Either drag and “**Drop files here,**” or click the “**Select files**” button to attach an external document with a summary of research accomplishments and list of papers published or in the press during the performance period.

File Formats: MS Word, MS Excel, or PDF file.

3. Click **Next**.
4. Go to [Step 9 above](#) to continue the self-evaluation.

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FACULTY REVIEWS ONLY: QUESTIONS & SUPPORTING DOCUMENTATION

5. Complete the Job Responsibilities and Faculty Evaluation Comments section of the self-evaluation:
 - a. Provide a response to each question in the **Answer** text box.
 - b. Click **Next**.
6. Complete the **Job Responsibilities and Faculty Attachment** section of the self-evaluation:
 - a. Click the **Faculty Academic Engagement Template**, download and open the file (the file opens outside of Workday)
 - b. Complete all sections of the template.
 - c. Save the file (Example: Faculty Academic Engagement Template – Your Last Name)
 - d. Return to the Attachment section in the self-evaluation and click the “**Select files**” button to attach your completed Faculty Academic Engagement template.
7. Click **Next**.

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8. Go to [Step 9 above](#) to complete the self-evaluation.

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.)
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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FAQ:

1. My self-evaluation will not submit.

- Confirm all fields of your evaluation submission with a red asterisk (*) have been updated.
- Confirm the following Goals fields have been completed/updated for each goal present on your review:
 - **Goal (title)**
 - **Description**
 - **Category** (Strategic Priority)
 - **Status** (Completed or Not Completed)
 - **Completed On** – *only appears if you select the Status of **Completed*** and refers to the date you completed your goal.

2. I added text comments to the comment section, but they **didn't save**.

- Workday automatically logs users out after 15 minutes of inactivity on a given screen to protect sensitive information maintained in the system. If you have not used the "Save" button or advanced your form to the next screen, your text entry may not have saved during a forced logout.
- If you are concerned about data loss while updating your self-evaluation, consider:
 - Drafting your responses in MS Word document and copy/pasting them into the form.
 - Use the **Save** button at the bottom of the screen; or
 - Advancing to the next screen before stepping away from your self-evaluation.

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