

Performance Reviews: Manage Performance Reviews

MANAGER GUIDE: COMMON PERFORMANCE REVIEW TASKS

This guide supports managers with key actions in the Workday Performance Review process. It includes instructions for:

[Reassign a Performance Review](#) to a different manager.

[Manually Advance a Self-Evaluation](#) to the “Complete Manager Evaluation” step.

[Send Back a Self-Evaluation to the Employee](#) which returns the review to the employee for updates.

A comment is required for all actions.

REASSIGN A PERFORMANCE REVIEW

You can **Reassign** in **Step 2 Complete Manager Evaluation for Performance Review** or **Step 4 Provide Manager Review Comments** tasks if you:

- **Weren't the manager for the majority** of the performance period (the current calendar year); or
- Did **not complete** the previous manager step (example: you did not complete the Manager Review and you receive a task to complete the Manager Acknowledgement); or
- You are an **individual contributor** (no longer in a manager role) and **unable to complete performance reviews** in Workday.

Helpful Tips:

- **Do not** use the Reassign option to **send back** the review to the **employee**. Refer to the [Send Back a Self-Evaluation to the Employee](#) section.

- The performance review needs to be reassigned **twice** during the process – **Step 2 Complete Manager Evaluation** for the Performance Review and **Step 4 Provide Manager Review Comments**.
- Reassignment requests must be **approved** by the Workday Administrator. The task will **remain in your Workday inbox until it is Approved**.
- Reassignment requests **require justification** in the comments to be approved. Requests submitted with **missing or vague** notes will be **denied**.
 - **Acceptable:** Transferred to my team on Sept. 1 and the previous manager was the manager for the majority of the review period. No longer in a manager role, reassigning to the current manager.
 - **Unacceptable:** Reassign. Not my employee. Transfer.

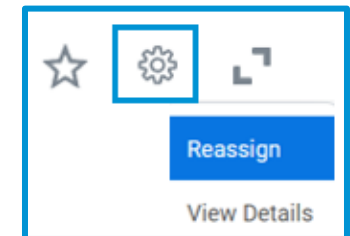
FROM YOUR WORKDAY INBOX

1. Select the **Manager Review: Performance Review** task.



Note: For individual contributors (no longer in a manager role), the task will appear blank.

2. Click on the **Cog** icon at the top of the screen in the task window.
3. Select **Reassign**.

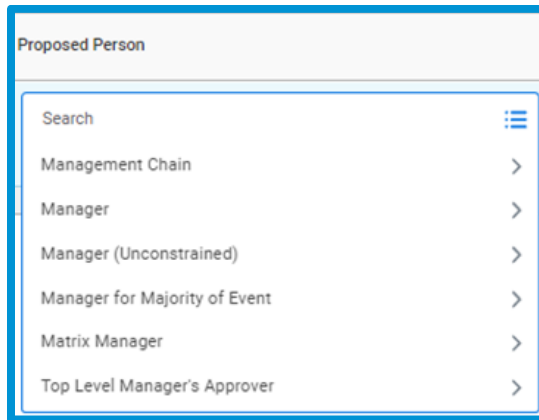


4. Click **List** icon in the **Proposed Person** field to select a person from the drop-down list; or search the manager's name.

Use one of the following options to select a manager:

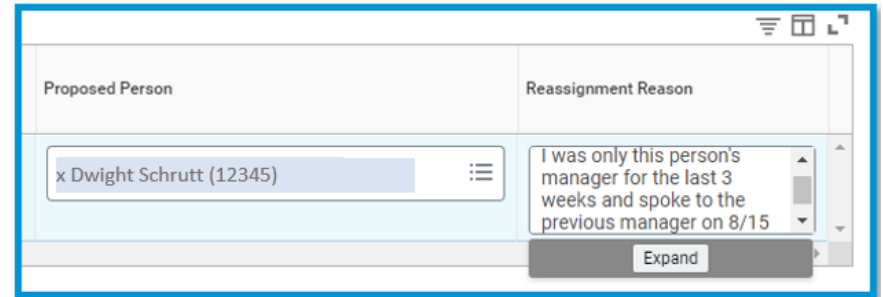
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- Type in the manager's name in the **Search** field and select Enter on your keyboard.
- **Manager:** the employee's **current manager** (this is the option that should be selected by Individual Contributors (no longer in a manager role) reassigning reviews).
- **Management Chain:** You and any managers above you in your management structure. If the employee has an Additional Manager, that manager along with their management chain will appear on this list.
- **Manager for the Majority of the Event:** The manager the employee reported to for the majority of the performance period will appear on this list.



The screenshot shows a dropdown menu titled 'Proposed Person'. The menu is open, displaying a search bar and a list of options with right-pointing chevrons: 'Search', 'Management Chain', 'Manager', 'Manager (Unconstrained)', 'Manager for Majority of Event', 'Matrix Manager', and 'Top Level Manager's Approver'.

5. Add a **Reassignment Reason** to the provided field.
 - a. Comments must include relevant justification for the reassignment request. Generic and missing comments on requests will be denied by Workday Administrators.



The screenshot shows a form with two columns: 'Proposed Person' and 'Reassignment Reason'. The 'Proposed Person' column has a dropdown menu with 'x Dwight Schrutt (12345)' selected. The 'Reassignment Reason' column has a text area containing the text: 'I was only this person's manager for the last 3 weeks and spoke to the previous manager on 8/15'. Below the text area is an 'Expand' button.

6. Click **OK**.

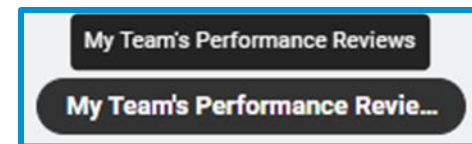


Note: Once you click OK, the task will remain in your Workday inbox until approved for reassignment. If denied, you will receive a notification.

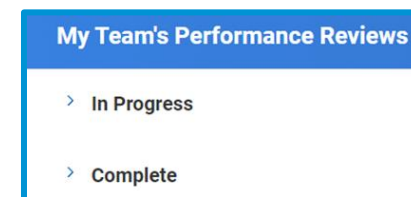
MANUALLY ADVANCE A SELF-EVALUATION

To ensure timely completion of Performance Reviews, managers can advance a pending Self-Evaluation task to the Manager Review stage on behalf of the employee. While completing a self-evaluation is encouraged, it is not mandatory. From your **Workday Home Screen**

1. Click **My Team's Performance Reviews**
2. If the In Progress reviews are not displayed, click the > to view the list.



The screenshot shows two buttons: 'My Team's Performance Reviews' and 'My Team's Performance Review...'. Both buttons are highlighted with a blue border.



The screenshot shows a dropdown menu titled 'My Team's Performance Reviews'. The menu is open, displaying two options with right-pointing chevrons: 'In Progress' and 'Complete'.

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Note: The review must be in the **Complete Self-Evaluation – Initiation** step to manually advance to the Manager Review step.

- Click the **Complete on Behalf of** button next to the review.



- Use the Comment field to add a note with the reason for moving the self-evaluation forward. (e.g.: Self-evaluation is not required.)

- Click **OK**.



Note: The review will move to the **Complete Manager Evaluation** step with a task to your Workday inbox for the employee.

SEND BACK A SELF-EVALUATION TO AN EMPLOYEE

This process allows a manager to return an employee's performance review to the self-evaluation step for editing—either to request additional input from the employee or if the self-evaluation was advanced prematurely. A manager can send back a review from:

- Outside the performance review; and
- Within the review by using the **Send Back** button.

Helpful Tips:

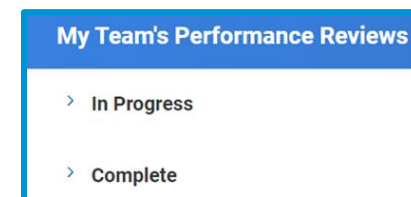
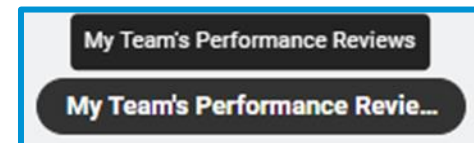
- Employees cannot see manager ratings and comments when a review is sent back.**
- All ratings and comments** completed by the manager prior to the send back will be **saved to the review** and visible once the review is resubmitted.
- Goals** added by the manager **are visible** to the employee when the review is **sent back**.



Note: Matrix Managers **must use** the [Send Back While Inside the Review](#) option to send a review back to the employee.

SEND THE SELF-EVALUATION BACK WHEN OUTSIDE OF THE PERFORMANCE REVIEW

- Click **My Team's Performance Reviews**
- If the In Progress reviews are not displayed, click the **>** to view the list.



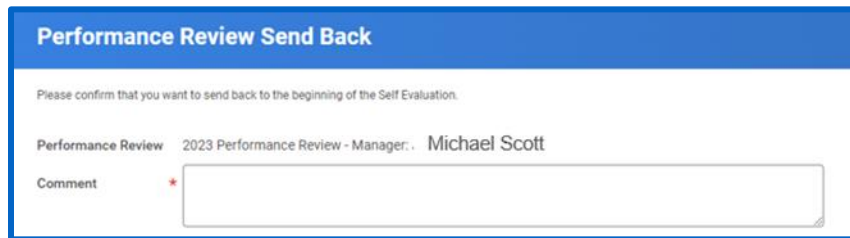
- The review must be in the current step of **“Complete Manager Evaluation – Initiation”** to send it back. Click the **Send Back**

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button.

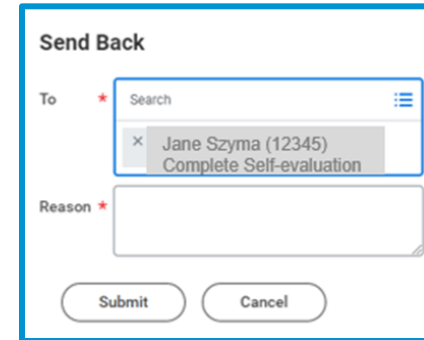


- Another screen appears confirming if you would like to send back to the self-evaluation step. In the **Comment** box, indicate the **reason** you are sending the self-evaluation back. (For example: Employee needs to include additional information in the goals section)

A screenshot of the "Performance Review Send Back" screen. It has a blue header with the title "Performance Review Send Back". Below the header, there is a message: "Please confirm that you want to send back to the beginning of the Self Evaluation." Underneath, it says "Performance Review 2023 Performance Review - Manager: Michael Scott". At the bottom, there is a "Comment" field with a red asterisk and a text input box.

- Click **OK**. The performance review is moved to the “**Self-Evaluation – Initiation**” step and the employee will have a **task in their Workday inbox** to access the review.

- Click **Send Back** button at the bottom of the screen.
- In the pop-up, the **To** field automatically defaults the employee’s name.
- Add a comment to the **Reason** field. Provide specific feedback as to why the review is being sent back (e.g.: Employee needs to include additional information in the Goals section).

A screenshot of the "Send Back" pop-up. It has a blue header with the title "Send Back". Below the header, there is a "To" field with a red asterisk and a search bar. A dropdown menu is open, showing "Jane Szyma (12345) Complete Self-evaluation". Below the "To" field, there is a "Reason" field with a red asterisk and a text input box. At the bottom, there are "Submit" and "Cancel" buttons.

- Click **Submit**.

SEND BACK WHILE INSIDE THE REVIEW WITH IN-PROGRESS MANAGER RATINGS / COMMENTS

- Open the performance review task from your Workday inbox.
- Select **Review and Submit** from the review navigation menu.

