

Conducting a Performance Review on *Workday*

This job aid outlines information and instructions to complete a TAMU “Performance Review” (employee performance evaluation) on *Workday*.

INTRODUCTION

- A **Performance Review (or employee performance evaluation)** is a formal and structured process to:
 - assess an employee’s work performance (effectiveness, productivity, contributions)
 - provide feedback
 - identify both strengths and areas needing improvement
 - set goals for future development
- System Regulation 33.99.03, *Performance Evaluation for Non-Faculty Employees* specifies that such **employees be evaluated each year**. Department heads may conduct more frequent and special evaluations as deemed necessary.
- TAMU’s annual performance review period is **August 20th through October 3rd**. All performance reviews are **due no later than Friday, October 3, 2025**.

THINGS TO KNOW / PREPARATION

- **Know the Job Description.** Ensure the employee’s job description is up-to-date and accurate – and that you are familiar with it.
- **Be Honest and Objective.** Provide concrete and specific examples of the employee’s performance, both positive and areas needing improvement.
- **Focus on Improvement.** Address under-performance. Be clear about what is expected. Set goals and offer guidance and support for reaching those goals.
- **Be Open to Discussion.** Encourage a 2-way conversation. Actively listen to the employee’s perspective.
- **Keep Communication Positive.** Highlight the employee’s strengths. Express confidence in the employee’s future development and improvement.
- **Keep Communication On-Going Between Performance Reviews.** Provide regular check-ins and real-time feedback to help the employee stay on track. Address issues as they arise. Highlight accomplishments and growth along the way. Provide support and encouragement as needed.

GETTING STARTED

1. In *Workday*, click on the **My Tasks** icon on the upper right corner. (Or click on **Menu** on the upper left corner, click on **Home**, then look under **Awaiting Your Action.**)
2. Click on the performance review you would like to work on. As an example, the item to click on will read as follows:

Performance Review – Manager Evaluation for: George Washington

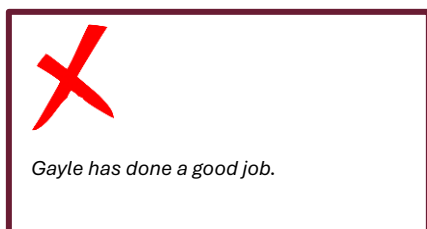
3. Read **Instructions for Manager**, then click on the blue **Get Started** button.
4. Listed on the left margin of the screen are the 9 sections of the Performance Review. Click through the sections to complete each. The following chart provides a brief description of each section.

1. ATTACHMENTS (optional)	Upload items to support the evaluation.
2. GOALS (not mandatory but advisable if development needed)	Add goals. Then, rate and comment on established goals.
3. COMPETENCIES	Rate and comment on the 5 competencies expected of all employees: a. Service b. Teamwork / Collaboration c. Support of A&M System Core Values (RELLIS) d. Initiative e. Accountability
4. SUPERVISORY COMPETENCIES (if applicable)	Rate and comment on the 2 competencies expected of all supervisors: a. Supervision b. Organizational Leadership
5. RESPONSIBILITIES	Rate and comment on each “responsibility” listed on the employee’s job description.
6. CERTIFICATION QUESTION	Certify that the employee is not past due on any required/assigned trainings.
7. OVERALL RATING	Rate and comment on overall performance.
8. MANAGER/EMPLOYEE REVIEW MEETING	Both evaluating supervisor and employee acknowledge that they held a review meeting, during which the evaluation was discussed and the job description reviewed for accuracy.
9. REVIEW AND SUBMIT	All evaluations are due on Friday, October 3, 2025.

5. The following is the **rating system** used for Performance Reviews:

1. *Does Not Meet Expectations*
 2. *Partially Meets Expectations*
 3. *Meets Expectations*
 4. *Exceeds Expectations*
 5. *Significantly Exceeds Expectations*

6. For the sections COMPETENCIES, SUPERVISORY COMPETENCIES, RESPONSIBILITIES, and OVERALL RATING, a **comment** by the evaluating supervisor is **required** for ratings other than “Meets Expectations.”
7. **Comments must directly support the rating given.** Use specific, concrete examples of observed performance and behaviors. Here is an example:



8. To reiterate, **all performance reviews are due no later than Friday, October 3, 2025.**
9. For questions or guidance, please contact the TAMIU Office of Human Resources at ext. 2365 or HR@tamiu.edu.