

2024-2025 Annual Performance Review Guide for Supervisors

Navigate to your Workday inbox.

Locate the “Performance Review-Manager Evaluation” task for your employee.
Click  to maximize the screen.

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

Performance Review - Manager Evaluation for: Claudia Martinez

8 second(s) ago - Due 02/13/2021; Effective 01/31/2021

Performance Review - Manager Evaluation for: Ashley Carey

19 hour(s) ago - Due 02/13/2021; Effective 01/31/2021

Performance Review - Manager Evaluation for: Melissa Dominguez

19 hour(s) ago - Due 02/13/2021; Effective 01/31/2021

Performance Review - Manager Evaluation for: Araceli Sandoval

19 hour(s) ago - Due 02/13/2021; Effective 01/31/2021

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez

Actions

8 second(s) ago - Due 02/13/2021; Effective 01/31/2021

Review Period

02/01/2020 - 01/31/2021

INSTRUCTIONS FOR MANAGER:

Upon completion of the Manager Evaluation, please ensure you meet with the employee to discuss the performance review, provide feedback on strengths and areas for development in relation to our core competencies, the position responsibilities and their goals.

In the event the position responsibilities require updating, you will need to initiate the Edit Position Restrictions business process upon completion of the performance review process. Do not update the responsibilities on the performance review as the edits made on the performance review will not update the responsibilities listed on the position.

Continue where I left off

A simple step-by-step guide

Go to Summary Editor

Edit everything on one page

Note: If you are not the employee’s direct supervisor, contact Human Resources by e-mailing hr@tamiu.edu or calling (956)326-2365.

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia

Martinez Actions

8 second(s) ago - Due 02/13/2021; Effective 01/31/2021



Review Period
02/01/2020 - 01/31/2021

INSTRUCTIONS FOR MANAGER: Upon completion of the Manager Evaluation, please ensure you meet with the employee to discuss the performance review, provide feedback on strengths and areas for development in relation to our core competencies, the position responsibilities and their goals.

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Go to Guided Editor

A simple step-by-step guide



Go to Summary Editor

Edit everything on one page

Click on "Go to Guided Editor" to launch a section-by-section view of the Performance Review.

The first section of the performance review will be the Attachments section. Do not upload an attachment.

You can proceed to the next screen by clicking the “Next” button.

← 1 of 61

↑ ↓

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez

8 second(s) ago - Due 02/13/2021; Effective 01/31/2021

Review Period
02/01/2020 - 01/31/2021

Attachments

An attachment is not required. If you choose to attach a document to the Performance Review, please upload it here in the Attachments section.

Manager

Add

Next

You will, next, be required to rate your employee’s goals. If there are no goals populated for your employee, please enter them at this time by selecting the “Add” button.

← 1 of 61

↑ ↓

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez

8 second(s) ago - Due 02/13/2021; Effective 01/31/2021

Review Period
02/01/2020 - 01/31/2021

Goals

Add

Back

Next

If there are no goals populated for your employee, please enter them at this time.

The Performance Review requires that you provide an updated status, a rating and accompanying comment for all of your employee's goals.

Goals ▾

Use Existing Goal

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Goal *

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Enter title of goal.

Description

Format ▾

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Enter goal description.

Supports

☰

Due Date

MM/DD/YYYY

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Enter due date (if one exists).

Status

select one ▾

Update your employee's progress in achieving the goal.
Select from: Discontinued
 Not Started
 In Progress
 Complete

Manager Evaluation

Rating

select one ▾

Provide a rating for all employee goals.
Select from: Not Applicable
 Does Not Meet Expectations
 Partially Meets Expectations
 Meets Expectations
 Exceeds Expectations
 Significantly Exceeds Expectations

Comment

Format ▾

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Comment is Required***

Add

Back

Next

Remember to save your progress.

Use this field to add in any existing employee goals not already part of this review. Select a goal from the prompt and it will be automatically added to the review section content below.

Update your employee's progress in achieving the goal.
Select from: Discontinued
 Not Started
 In Progress
 Complete

Provide a rating for all employee goals.
Select from: Not Applicable
 Does Not Meet Expectations
 Partially Meets Expectations
 Meets Expectations
 Exceeds Expectations
 Significantly Exceeds Expectations

Click to add any additional goals. Otherwise click "Next" to proceed to the next section, Competencies.

Employees must be rated on the following general competencies: service, teamwork/collaboration, diversity & respect, initiative and accountability. If rated other than “Meets Expectations”, a comment is required.

Competencies ▾

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Competency

Service

Description

Promotes a culture of service. Examples of behaviors might include:

- Responds appropriately to the needs of internal and external customers.
- Seeks to secure positive interpersonal relations.
- Conveys instructions, ideas, and information clearly.
- Follows through on commitments to others.
- Represents one's position, work unit and organization both internally and externally professionally and responsibly.
- Anticipates needs or problems and acts to meet or resolve responsibly, efficiently and cost-effectively.

For research focused positions, examples of behaviors include:

- Works to create and sustain a measurable, high standard of quality in research.
- Facilitates relationship with sponsors in ways that project respect, understanding and professionalism and strengthen the research program.
- Meets frequently and communicates openly to assure sponsor's needs are identified and satisfied.
- Works to develop sustainable initiatives with academic sector or partners.

Manager Evaluation

Manager Rating

select one ▾

Select from: Not Applicable
Does Not Meet Expectations
Partially Meets Expectations
Meets Expectations
Exceeds Expectations
Significantly Exceeds Expectations

Comment

Format ▾ B I U A ▾ :≡ 🔗 ↕

Enter comment here.

Competency

Teamwork/Collaboration

Description

Promotes cooperation and effective relationships. Examples of behaviors might include:

Back

Next

Remember to scroll down to view all areas that must be rated and save your progress as you go.

Once all general competencies have been rated, click on the next button to proceed to the next section, Supervisory Competencies.

All employees must be rated on supervision and organizational leadership. If these are not relevant to the employee, please include a comment stating the same.

Select from the following ratings:

- Not Applicable
- Does Not Meet Expectations
- Partially Meets Expectations
- Meets Expectations
- Exceeds Expectations
- Significantly Exceeds Expectations

Supervisory Competencies ▾

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Competency

Supervision

Description

Manages performance and cultivates a positive work environment. Examples of behaviors might include:

- Promotes employee excellence by establishing appropriate performance goals and assignments; providing coaching, feedback, and support; and rewarding high performance.
- Provides clear direction and communicates expectations.
- Manages employee performance issues.
- Promotes employee well-being.
- Supports employee growth by assisting with career plans and providing opportunities for professional development.
- Promotes collaboration and teamwork within work unit.

Manager Evaluation

Manager Rating

select one

Comment

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Enter comment here.

Competency

Back

Next

Remember to scroll down to view all areas that must be rated and save your progress as you go.

Once all supervisory competencies have been rated, click on the next button to proceed to the next section.

This section of the Performance Review requires that you rate your employee's performance in relation to their responsibilities as listed on their position description. If rated other than "Meets Expectations", a comment is required.



Select from the following ratings:





Not Applicable
Does Not Meet Expectations
Partially Meets Expectations
Meets Expectations
Exceeds Expectations
Significantly Exceeds Expectations

Remember : Making changes to the responsibilities listed will NOT update the position description. If updates are needed, these will need to be done after the performance review has finalized.

The screenshot shows the 'Responsibilities' section of a performance review form. It contains two visible responsibility entries. The first entry, '20% - First job duty', has a 'Manager Evaluation' dropdown menu highlighted with a red box, showing 'select one'. Below it is a 'Comment' text area with the placeholder text 'Enter comment here.' and a red arrow pointing to it. The second entry, '25% - Second job duty', is partially visible below. On the right side, a vertical scrollbar is highlighted with a green box and an arrow pointing to it, with a green text annotation: 'Remember to scroll down to view all responsibilities that must be rated and to save your progress as you go.' At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box and a red arrow pointing to it. A red text annotation at the bottom right says: 'Once all responsibilities have been rated, click on the next button to proceed to the next section.'

Responsibilities


Responsibility *  

Format  **B** *I* U   





20% - First job duty


Manager Evaluation



Rating

select one 

Comment


Format  **B** *I* U   

Enter comment here. 

Responsibility *  

25% - Second job duty

Manager Evaluation

Back Next 

Remember to scroll down to view all responsibilities that must be rated and to save your progress as you go.

Once all responsibilities have been rated, click on the next button to proceed to the next section.

Otherwise, update the rating to “No”.

Click the next button to proceed to the next section.

Provide an overall rating for your employee.

Select from the following ratings:

- Does Not Meet Expectations
- Partially Meets Expectations
- Meets Expectations
- Exceeds Expectations
- Significantly Exceeds Expectations

Overall Rating

Manager Evaluation

Rating *

select one

Comment

Format | B | I | U | A | | | | |

Enter comment here.

Back Next

*Comments are required

Click to proceed to the next section.

If you have not yet met with your employee, answer “No” to this prompt. Once you have met with your employee, return to this section and update the answer to “Yes”.

Manager/Employee Review Meeting

Question:

Have you had your Performance Review meeting with your employee? If you plan on making edits after your meeting, please Save for Later on the Summary page. Once edits are complete, answer question and submit.

Summary

Manager Evaluation

Rating/Answer *

select one

Back Next

Click “Next” to proceed to the Summary section.

The Performance Review Summary page provides a consolidated view of all areas evaluated - goals, competencies, responsibilities, etc.

Please review the evaluation and edit, if necessary.

Stop to share and discuss the performance review with the employee before clicking the submit button. *Once you have submitted this item you will no longer be able to edit it.*

The screenshot shows the 'Complete Manager Evaluation' interface. At the top, a blue header contains the title 'Complete Manager Evaluation' and a subtitle 'Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez' with an 'Actions' button. To the right of the subtitle are three icons: a bar chart, a printer, and a question mark. A green arrow points from the printer icon to a text box on the right that says 'Click to generate PDF document to share with your employee.' Below the header, the 'Review Period' is '02/01/2020 - 01/31/2021'. The main content area has a section for 'INSTRUCTIONS FOR MANAGER' and another for 'Attachments'. Below these are sections for 'Manager' and 'Goals'. The 'Manager' section has an 'Add' button. The 'Goals' section has a 'Guide Me' button and a list of goals. One goal is visible with a title 'Goal *' and a subtitle 'Title of goal'. To the right of this goal is a green box containing a pencil icon, with a green arrow pointing to it from a text box on the right that says 'Edit (if needed)'. At the bottom of the form are three buttons: 'Submit', 'Save for Later', and 'Close'. Red arrows point to the 'Submit' and 'Save for Later' buttons from a text box at the bottom of the page. A red text box on the right side of the form says 'Remember to update the "Manager/Employee Review Meeting" section to "Yes" once you have met with your employee.'

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez [Actions](#)

Review Period
02/01/2020 - 01/31/2021

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Attachments [Guide Me](#)

Manager

[Add](#)

Goals [Guide Me](#)

Goal *
Title of goal

[Submit](#) [Save for Later](#) [Close](#)

Click to generate PDF document to share with your employee.

Edit (if needed)

Remember to update the "Manager/Employee Review Meeting" section to "Yes" once you have met with your employee.

Click "Submit" after you have met with your employee or "Save for Later" if you will be completing the performance review at a later time. Items "saved for later" will remain in your inbox until completed.

Once you have submitted the Performance Review this will be routed to the employee for acknowledgment and comments.

Success! Event submitted

Manager Evaluation: Annual: Staff Performance Review (No Self Evaluation) V2: Claudia Martinez

24 minute(s) ago - Due 02/13/2021; Effective 01/31/2021

Up Next

Claudia Martinez

Performance Review - Employee Comments and Acknowledgement for
Due Date 02/09/2021

Done

 Click "Done"

The Performance Review will be routed to you for a final acknowledgement once the employee has completed their assigned Workday task.

Scroll down to review all areas of the evaluation (now including the employees acknowledgement and comments).

Update the status and comments fields.

Acknowledgement

Manager Acknowledgement	Employee Acknowledgement
<p>Status *</p> <div><div>Search</div><div></div></div>	<p>Status</p> <p>Option 1: I acknowledge I have reviewed the position restrictions for accuracy; I have reviewed and discussed this performance evaluation with my Manager and I AGREE with the evaluation.</p>
<p>Comment</p> <div><div>Format</div><div><div><div>B</div><div>I</div><div>U</div><div>A</div><div></div><div></div></div><div></div></div><div></div></div>	<p>Comment</p> <p>Friday, 2/5 @ 5PM. These are my comments.</p>
	<p>Entered by</p> <p>Claudia Martinez</p>

Submit Save for Later Close

Select from:

Option 1: I have reviewed the position restrictions for accuracy and updates ARE NOT REQUIRED. I acknowledge I have reviewed and discussed this performance evaluation the Employee.

Option 2: I have reviewed the position restrictions for accuracy and updates ARE REQUIRED. I acknowledge I have reviewed and discussed this performance evaluation with the Employee.

Enter the date and time you met with your employee and any relevant comments.

Click "Submit" to complete the Performance Review.

*