Performance: Annual FT Staff Review Manager/Employee

New full-time hires who start on or after May 1, 2023 will not have an annual review, only a 90-day review for 2022-2023.

PREWORK TO BE COMPLETED BEFORE SELF-ASSESSMENT

EMPLOYEE: VERIFY 2022-2023 GOALS ARE ACCURATE

Before beginning the self-assessment, please ensure goals for 2022-2023 are in Workday*. Please refer to the goal verification job aid available in the Workday Resource Center.* If you do not have goals for 2022-2023 because you were not full-time staff with Collin College, you will omit this step. If you had a 90-day review in Workday and set goals, these should appear in your self-assessment.

EMPLOYEE: ACCESS PRIOR YEARS' REVIEWS

Before beginning the self-assessment, you may want to refer back to last year's performance review. *Please refer to the appropriate job aids available in the Workday Resource Center to access reviews from prior years.*

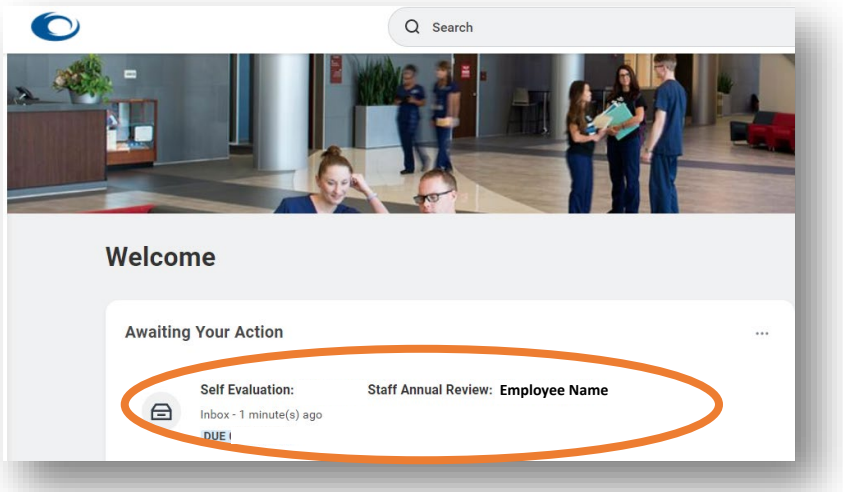
ANNUAL FULL-TIME STAFF REVIEW: EMPLOYEE SELF-ASSESSMENT

EMPLOYEE: COMPLETE SELF-ASSESSMENT

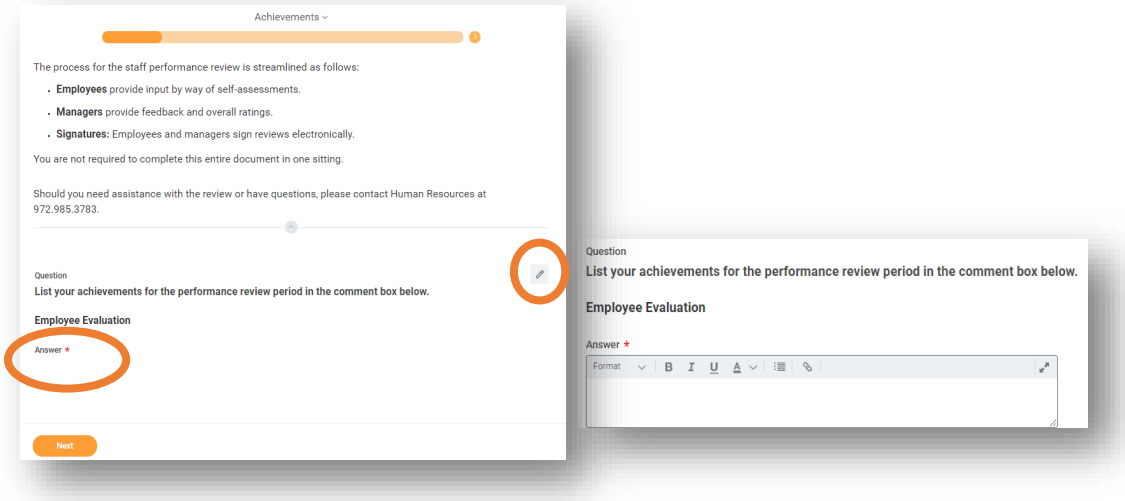
Launch Workday from Collin.onelogin.com or CougarWeb > My Workplace.

From the Workday **Home/Welcome** page:

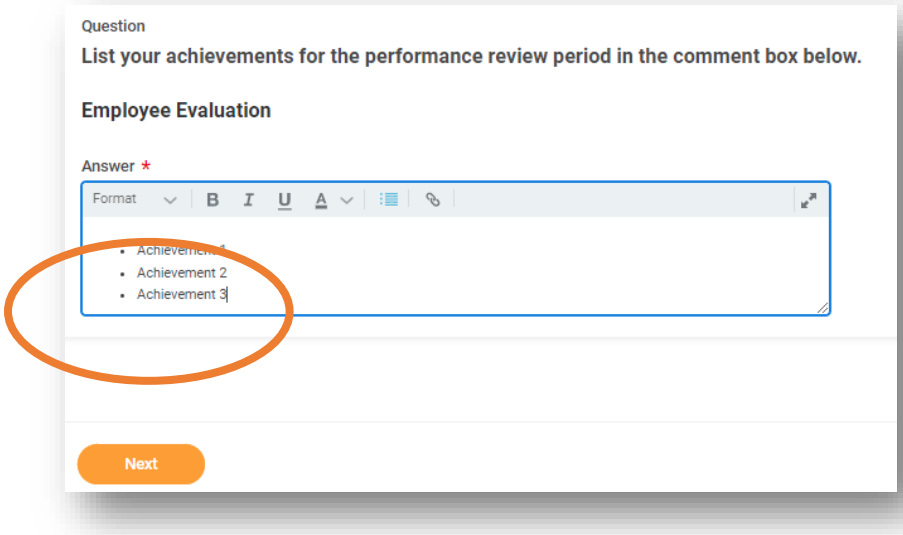
1. Launch the self-assessment under **Awaiting Your Action**. Do not be concerned about the due date listed in Workday. Please refer to the email sent from HR for due dates, unless otherwise indicated by your leader.



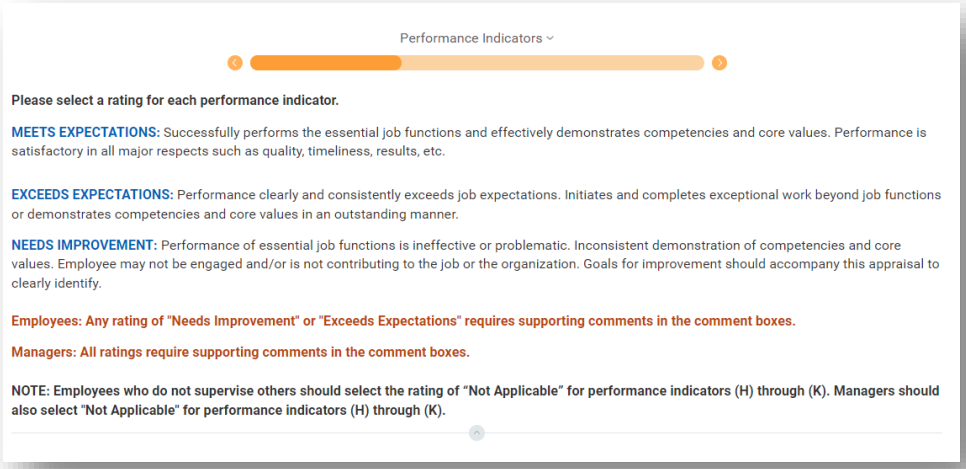
2. Click below **Answer** or select the **Pencil** icon to open a text box to add your **Achievements** for the appraisal period.



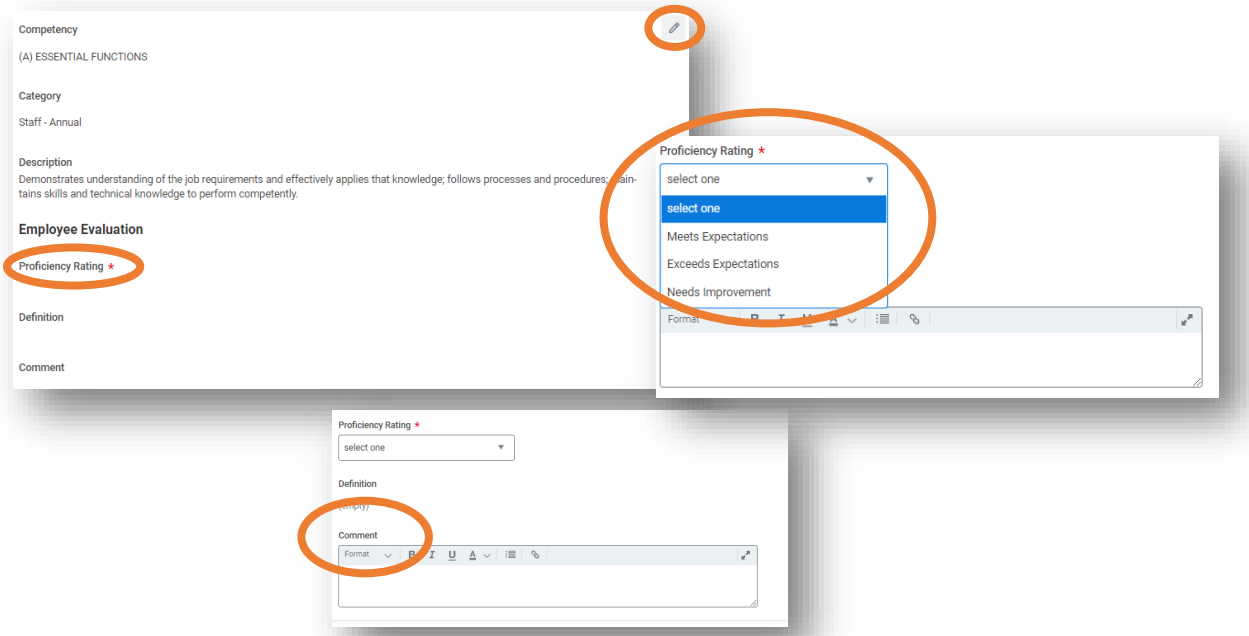
3. When finished, click **Next**.



4. Review instructions for rating yourself on each performance competency.



5. Scroll down. Click below **Proficiency Rating** or select the **Pencil** icon to open the rating selection for <u>each</u> **Competency** (Essential Functions, Customer Service, Communications, Decision Making and Problem Solving, Initiative, Balance of Quantity and Quality of Work, Demonstration of Core Values). **Comments are required for any ratings of "Exceeds Expectations" or "Needs Improvement."** *You may advance to the next section but will receive an error when attempting to submit if comments are not provided where required.*



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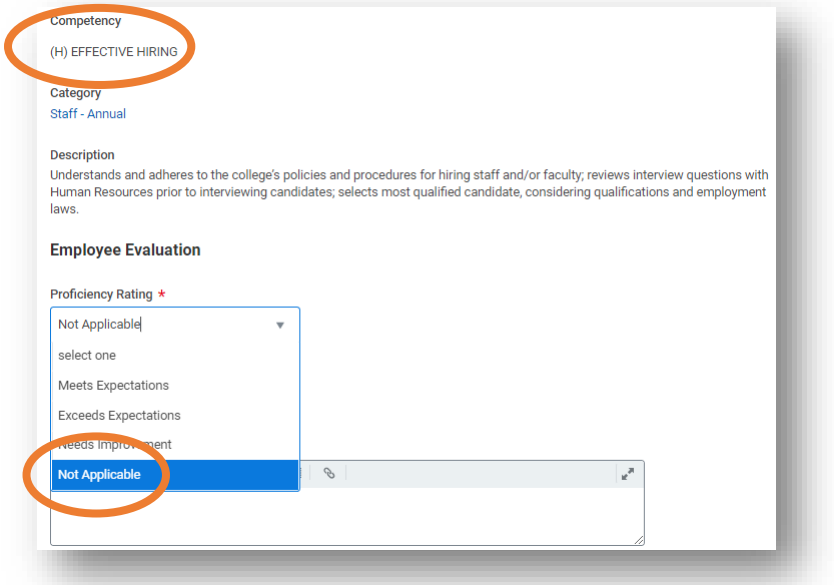
COLLIN COLLEGE

6. **Ratings must be provided for all competencies. If you do not supervise others,** please indicate **"Not Applicable"** for **(H) Effective Hiring** through **(K) Team Building.** Click **Next** when finished.



7. Evaluate the completion of goals for the appraisal period (2022-2023). Click **Rating** or the **Pencil** icon to reveal the drop-down menu to indicate goal completion under **Employee Evaluation**. You may also add comments. When finished, click **Next**.

IMPORTANT
Before this section can be successfully completed, you must verify that your 2022-2023 goals are in Workday. Please refer to the goal verification job aid for instructions on this process.

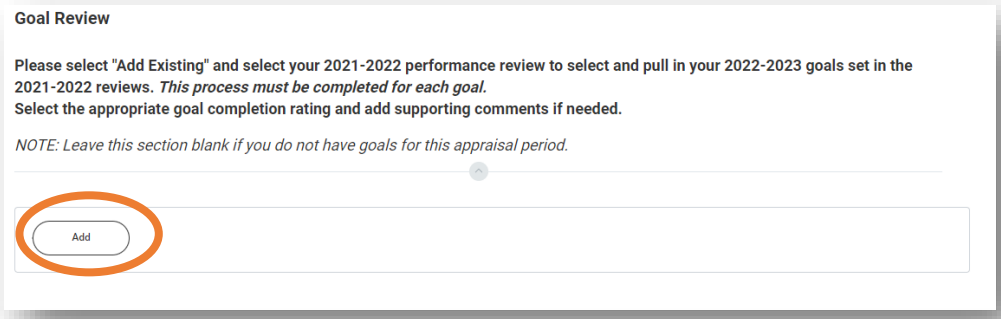
If you are new to Collin and completed your 90-day review in Workday and set goals for 2022-2023, your goals should appear here. If you did not have goals for 2022-2023, this section will remain blank.

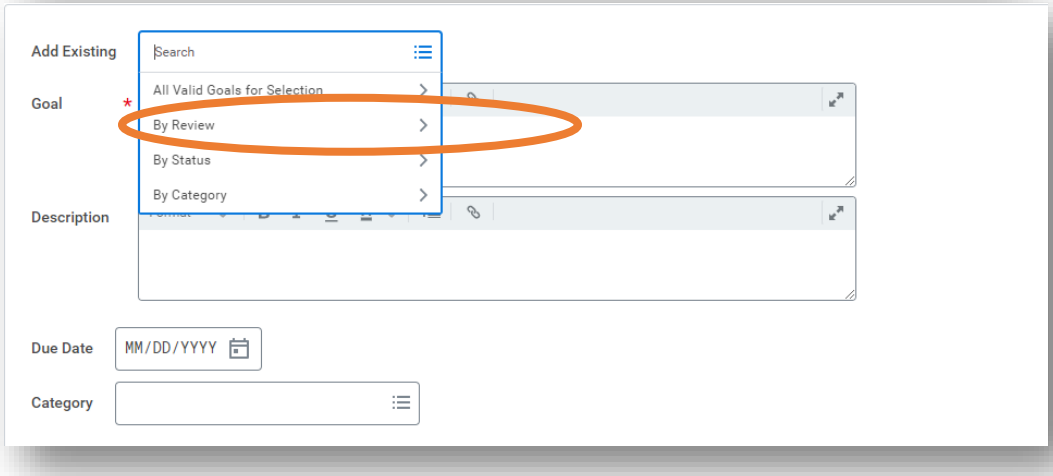
Do not edit 2022-2023 goal information on this page. If you do, you will receive an error when trying to submit your self-assessment. *Any goal*

*changes must be approved by your manager and completed using the **Goals** menu under your profile. Please refer to the goal verification job aid for further instructions.*

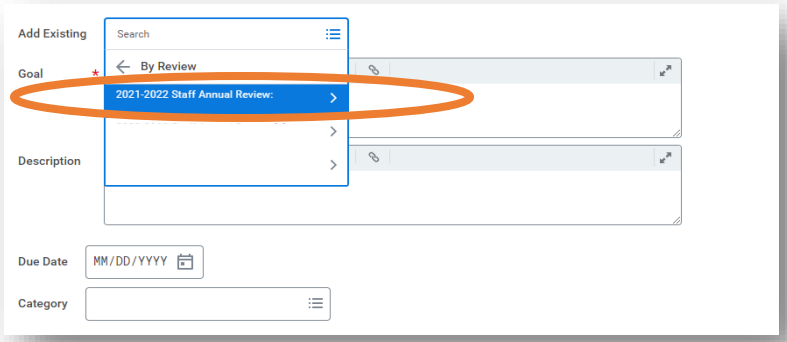
Please follow these steps to evaluate the completion of your 2022-2023 goals:

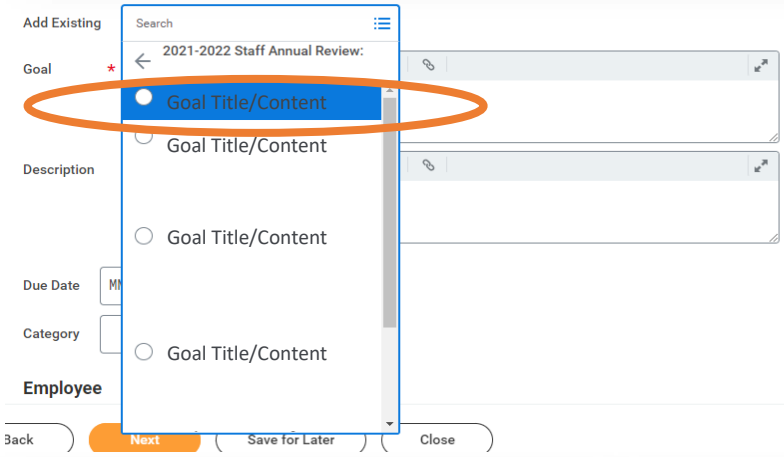
- Please click **Add**.
- Click **Add Existing**, then **By Review**.
- Select your **2021-2022 Staff Annual Review.**
- Select and pull in the first **goal set for this year**.
- Select the appropriate goal completion rating and add supporting comments if needed.
- Repeat the above steps until all 2022-2023 goals are added and evaluated.

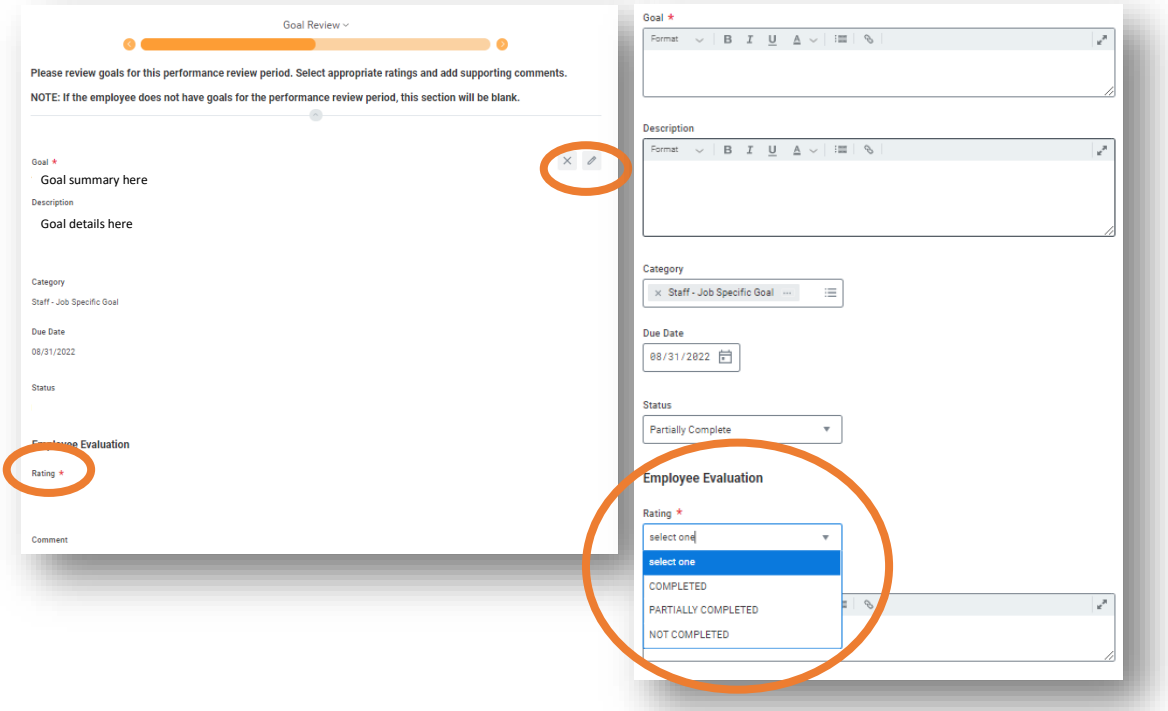




Performance: Annual FT Staff Review Manager/Employee



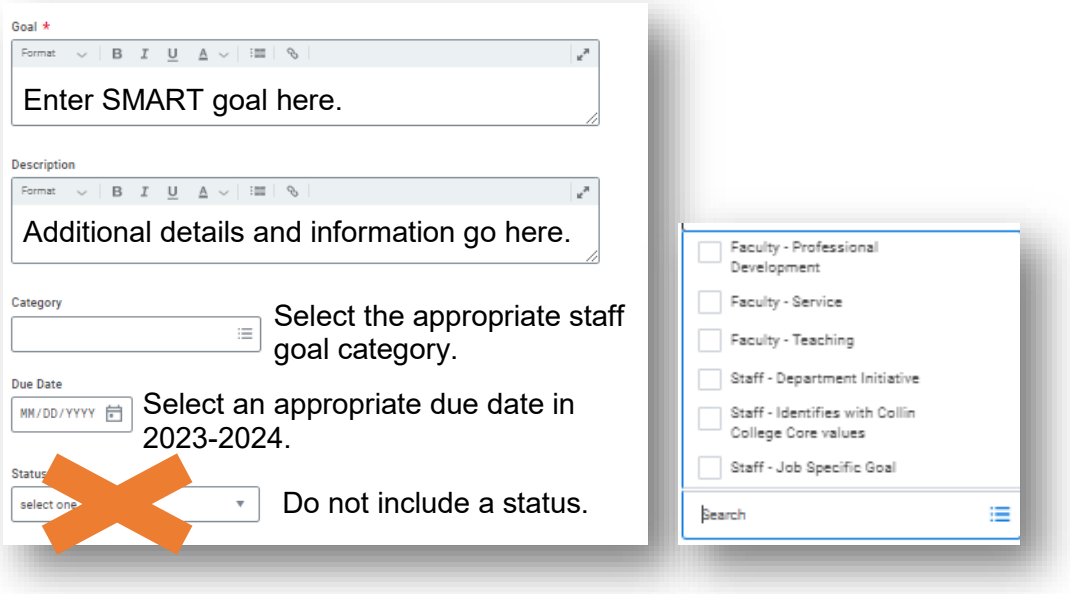




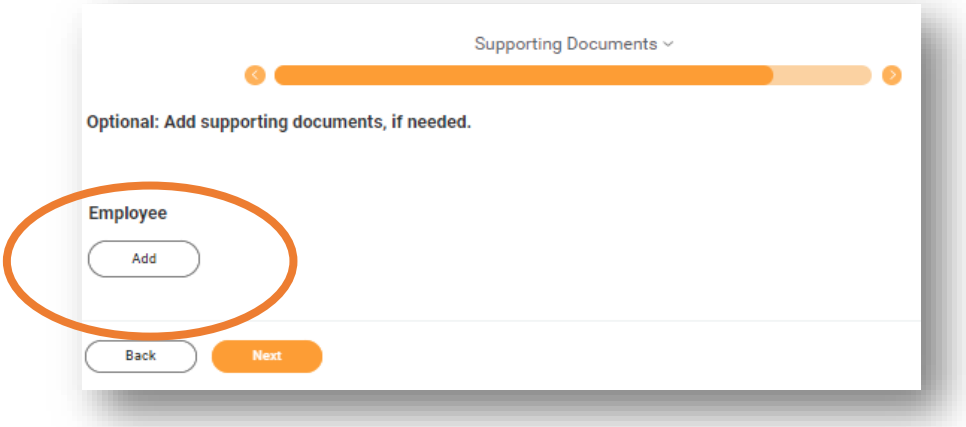
8. On the **Goal Setting** page, you will set goals to be completed in 2023-2024. Click **Add** to insert the goal information. Make sure you select an appropriate **Staff** goal **Category** and identify a **Due Date** in 2023-2024. *Failure to do so will result in an error when attempting to submit your self-assessment.*

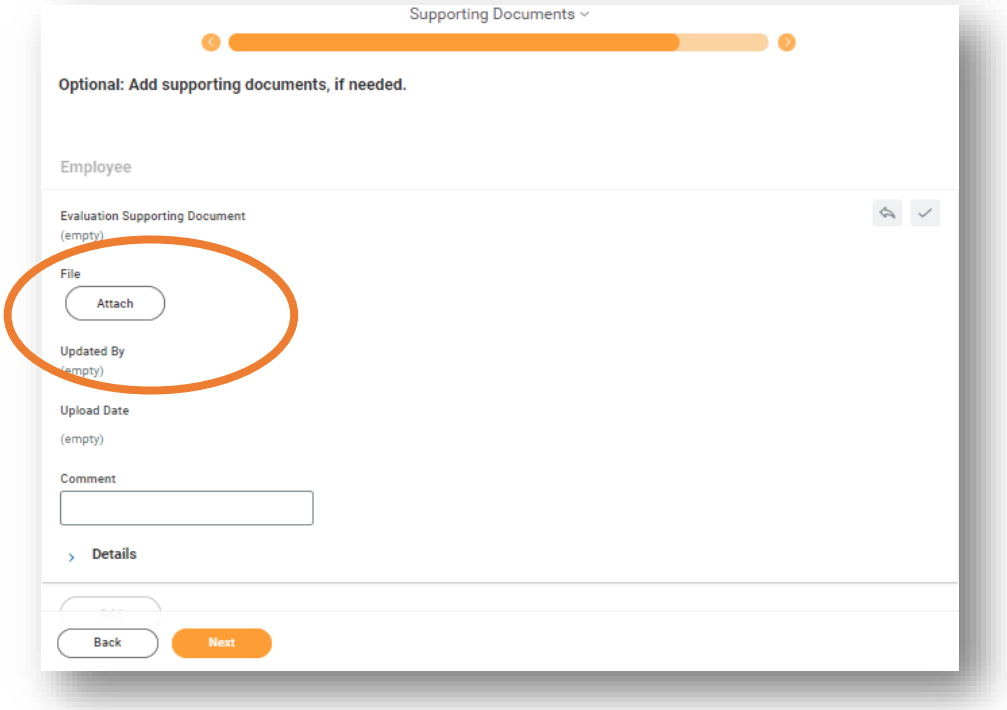
   Repeat this process until you have a minimum of three goals for 2023-2024. When finished, click **Next**.

   If you will be setting goals with your manager during your performance evaluation meeting, you may skip this section.



9. Click **Add**, then **Attach** to include supporting documentation, if needed. Click **Next**.

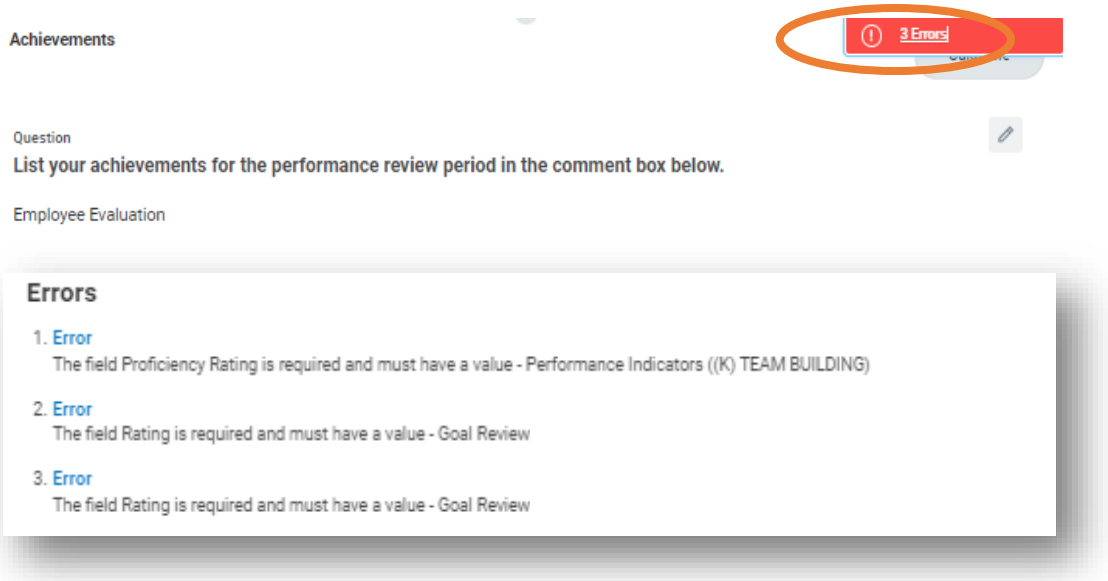




10. Carefully review all responses and make any needed changes. Click **Save for Later** to save and return to submit at a later time. Click **Submit** to route the appraisal to your manager. **Please review Step 11 regarding errors, alerts, and confirmation of submission.**

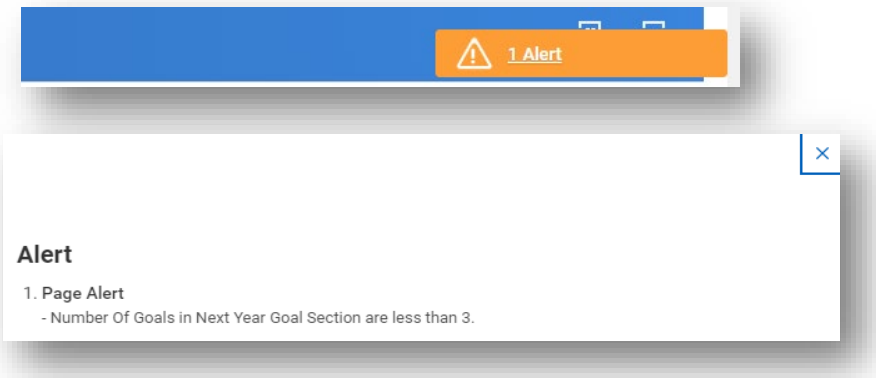
    *You cannot make changes once you click **Submit**. It is recommended that you finish the self-assessment and take a couple of days to reflect before submitting, if time permits.*

11. If you receive an error when attempting to submit, you must make corrections and click **Submit** again. To see error details, click the **Error** hyperlink in the red box. You may have to scroll up or down to see this box.



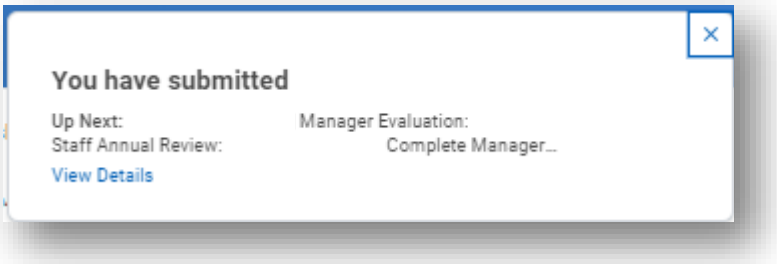
If you receive an **Alert**, you may make the change or not, depending on applicability. (For example, you may receive a warning that you have

created fewer than three goals for 2023-2024. Not having three goals set may be appropriate if you and your supervisor set goals together during the appraisal meeting.) You will have to click **Submit** again to ensure your review is submitted.



Your review has been submitted when you see the dialog box indicating success. If you do not see this box, your review is not yet submitted.

If your review is still in your **Action Items/Workday Inbox**, you have not successfully submitted.



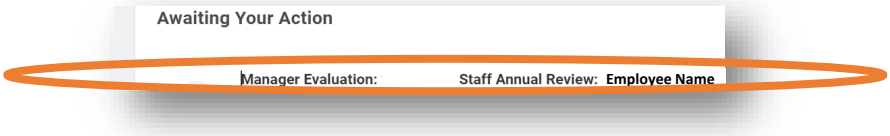
ANNUAL FULL-TIME STAFF REVIEW: MANAGER'S EVALUATION

MANAGER: REVIEW EMPLOYEE SELF-ASSESSMENT

Launch Workday from Collin.onelogin.com or CougarWeb > My Workplace.

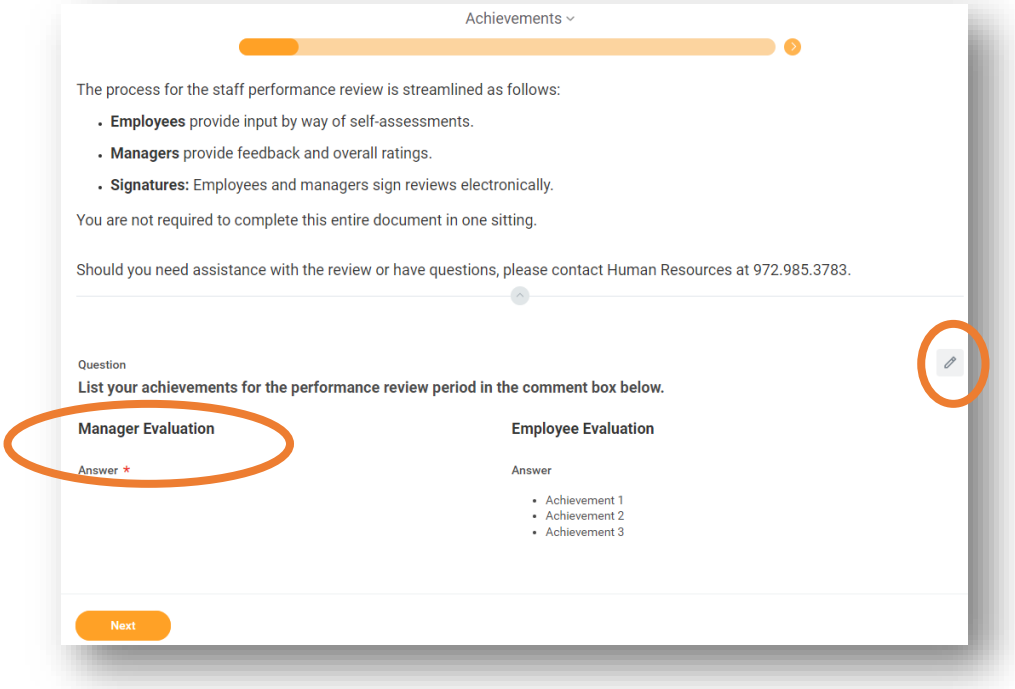
From the Workday **Home/Welcome** page:

1. Launch the appraisal under **Awaiting Your Action** and click **Get Started**, if needed. Do not be concerned about the due date listed in Workday. The overall appraisal due date is August 31, 2023. It is critical that the manager's review is completed with enough time to meet with the employee and obtain acknowledgements in Workday by August 31, 2023.



2. Indicate whether the employee has received a Level I or Level II disciplinary action from September 1, 2022-present. Click **Next**.

3. Review the employee's **Achievements** indicated in the self-assessment. Click **Answer** or the **Pencil** icon to add your comments. Click **Next**.

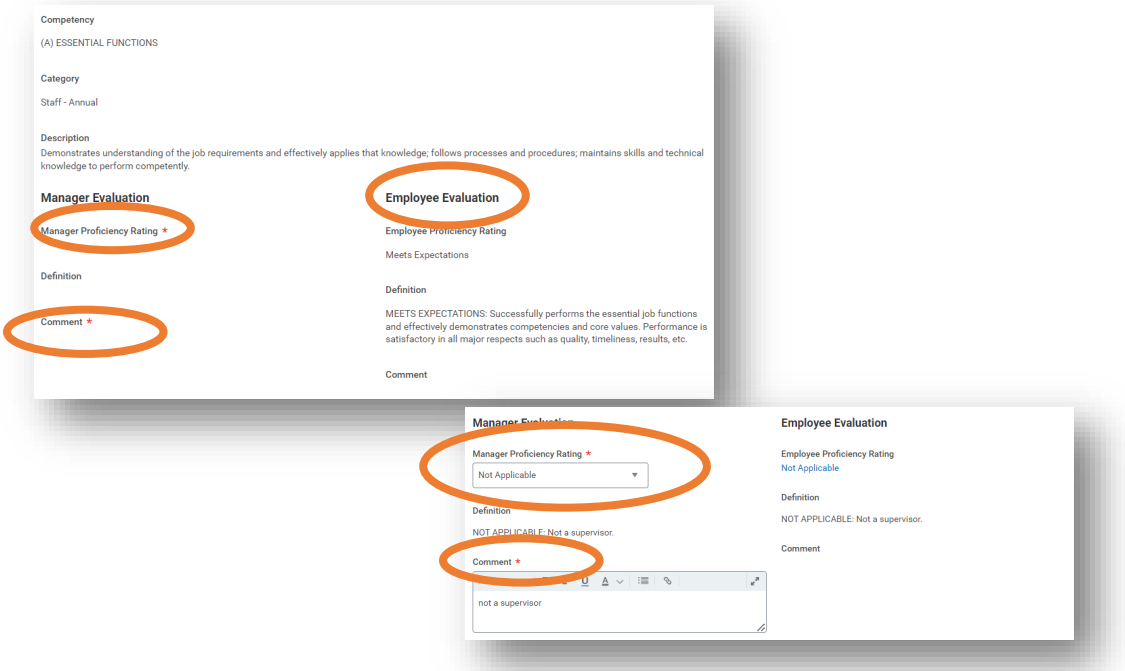


4. Review the instructions for rating the employee for each performance indicator/competency. Review the employee's self-assessment ratings for each competency. Comments in the self-assessment are required for any ratings of "Exceeds Expectations" or "Needs Improvement."

   Click below **Proficiency Rating** or select the **Pencil** icon to open the rating selection for each **Competency** (Essential Functions, Customer Service, Communications, Decision Making and Problem Solving, Initiative, Balance of Quantity and Quality of Work, Demonstration of Core Values). Comments by the manager are required for all competencies.

   Ratings must be provided for all competencies. If the employee does not supervise others, please indicate **"Not Applicable"** for **(H) Effective Hiring** through **(K) Team Building. The employee should also have indicated "Not Applicable" for (H)-(K).** Click **Next** when finished.

   IMPORTANT
   You may send back the self-assessment if an employee has not provided adequate comments, supervises others and has not provided ratings in (H)-(K), has provided ratings in supervisory areas but does not supervise others, or has any issues related go goal evaluation and goal setting. Navigate to the end of the appraisal and click **Send Back**.



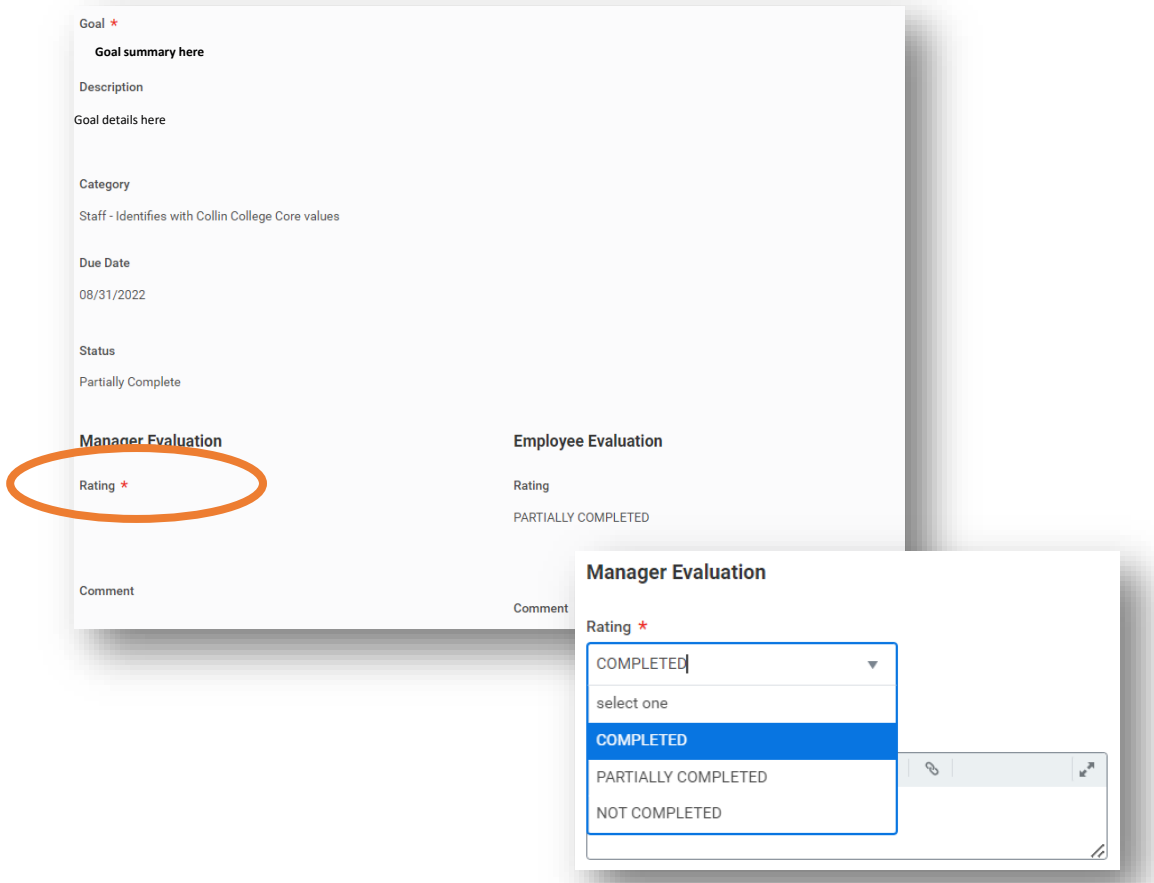
Your screens and processes may vary from this document.

5. Evaluate the completion of goals for the appraisal period (2022-2023). Click **Rating** or the **Pencil** icon to reveal the drop-down menu to indicate goal completion under **Manager Evaluation**. You may also add comments. When finished, click **Next**.

   If the employee is new to Collin and completed the 90-day review in Workday and set goals for 2022-2023, these goals should appear here. If the employee did not have goals for 2022-2023, this section will remain blank.

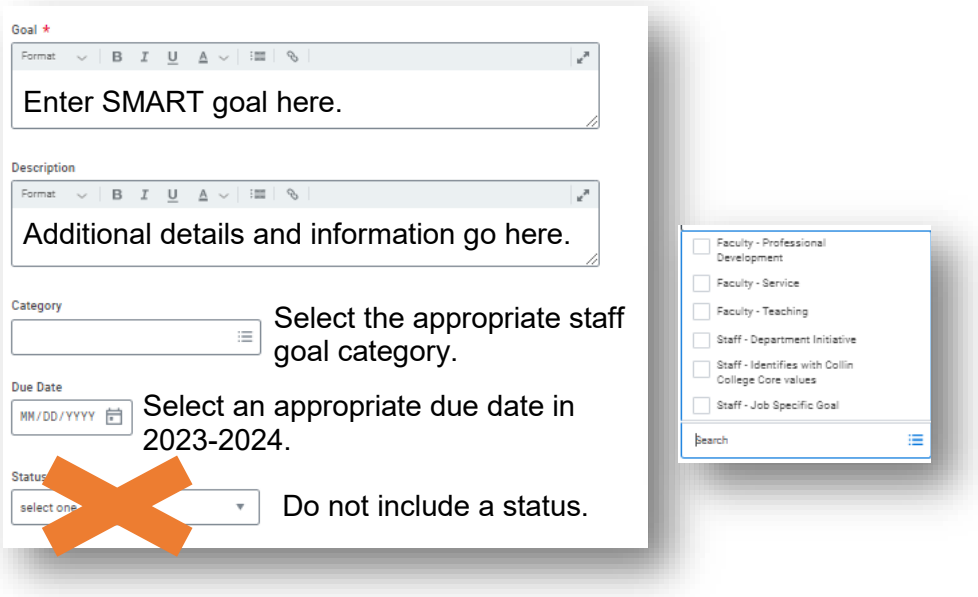
   If an employee has 2022-2023 goals, but they do not appear here for rating, please contact professionaldevelopment@collin.edu before continuing.

   Do not edit 2022-2023 goal information on this page. If you do, you will receive an error when trying to submit the appraisal. *Please refer to the goal transfer job aid for further instructions.*

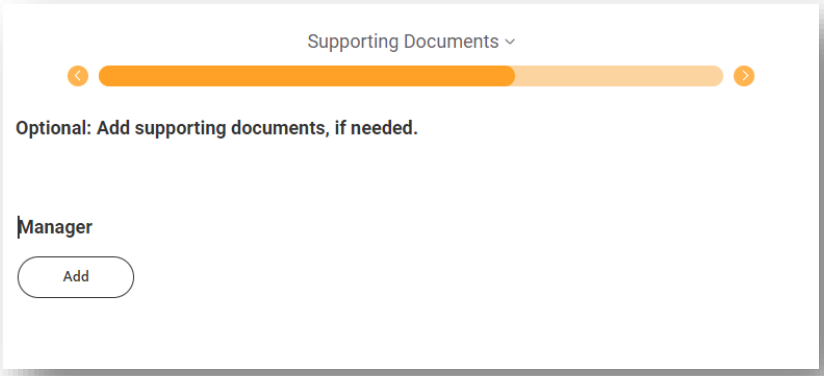


6. On the **Goal Setting** page, review the 2023-2024 goals set by the employee. You may edit these goals or add goals. Click **Add** to insert a new goal. Make sure you select an appropriate **Staff** goal **Category** and identify a **Due Date** in 2023-2024. *Please ensure to update any incorrect goal categories.*

   Repeat this process until there is a minimum of three goals for 2023-2024. When finished, click **Next**.

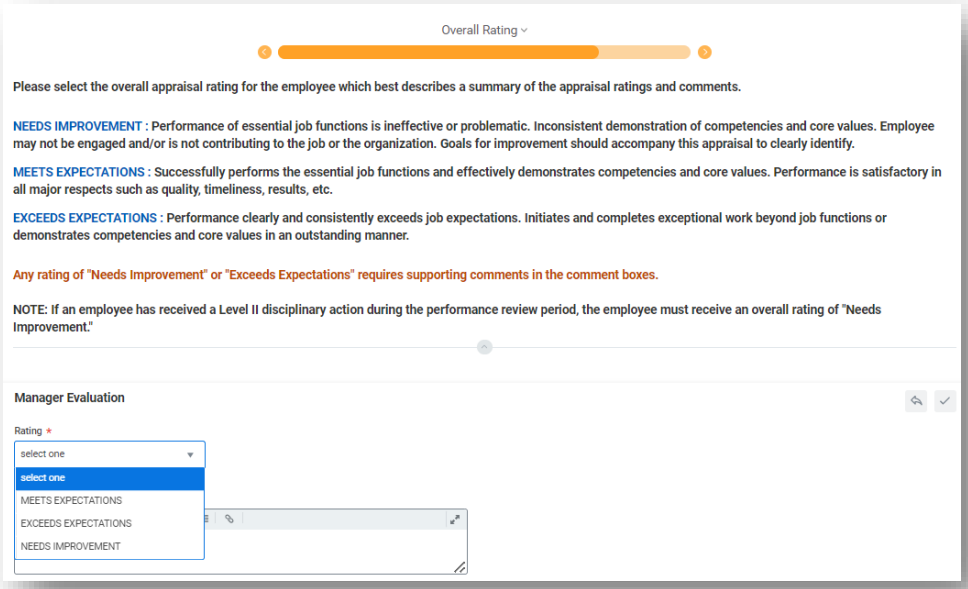


7. Click **Add**, then **Attach** to include supporting documentation, if needed. Click **Next**.

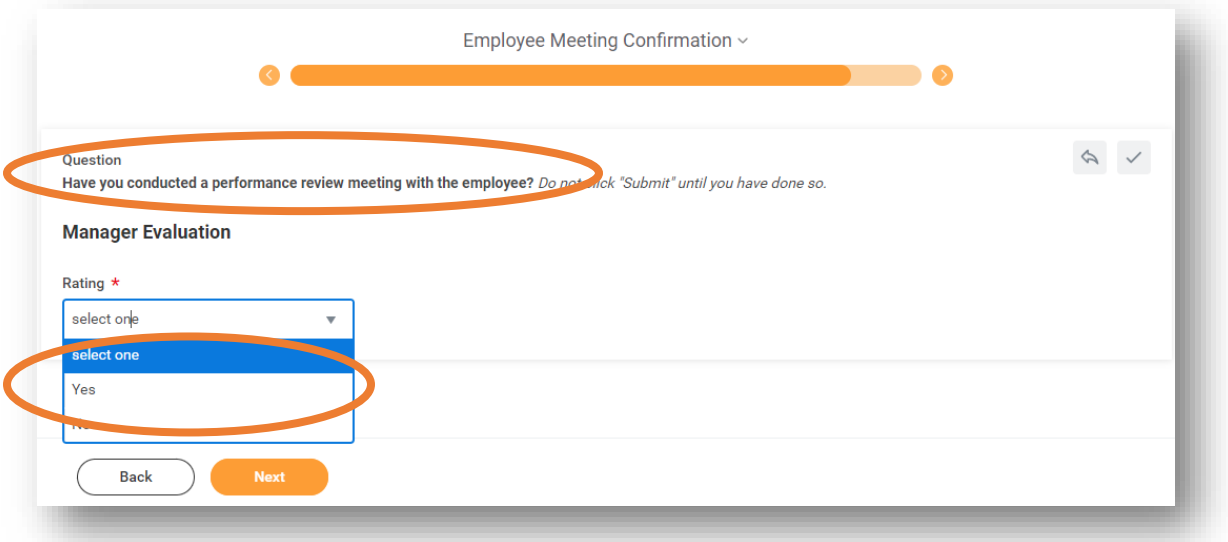


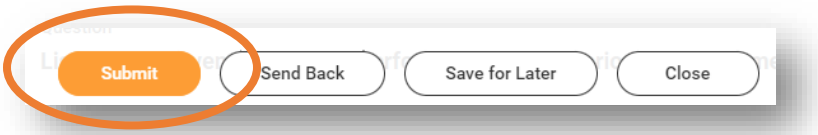
8. Indicate the **Overall Rating** for the employee. An employee who receives an overall rating of “Needs Improvement” will be ineligible for a general pay increase (GPI). If an employee has received a Level II disciplinary action during the evaluation period, an overall rating of “Needs Improvement” is required.

   Note: An overall rating of “Needs Improvement” should not be given to an employee who has not had documented coaching and disciplinary action during the evaluation period. **The annual performance review is not in lieu of coaching and progressive discipline.**

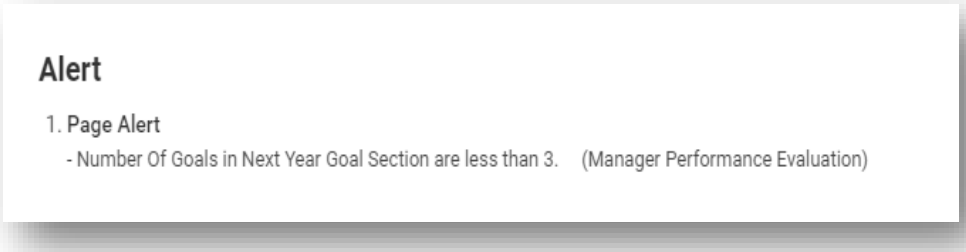


9. **Before submitting the review, the manager is expected to schedule and conduct a performance review meeting with the employee to discuss the performance appraisal. Follow these steps:**
    - Exit the review. Do not click **Submit**.
    - Print two copies of this review or pull up the document on a computer screen and share with the employee.
    - During the meeting, go over the review, provide feedback, and address any concerns.
10. Make any final necessary changes to the review online, click **Next**, then click **Submit** in the presence of the employee.

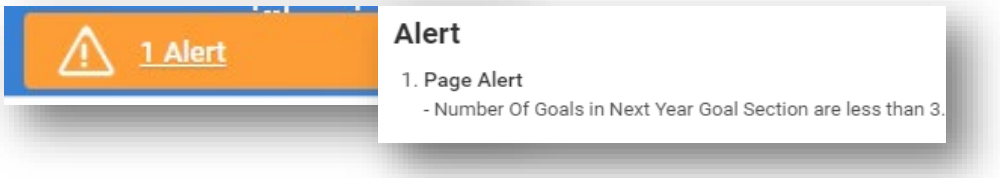




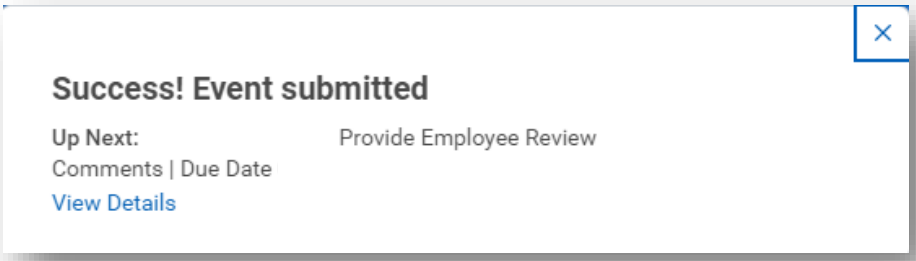
11. If you receive an error when attempting to submit, you must make corrections and click **Submit** again. To see error details, click the **Error** hyperlink in the red box. You may have to scroll up or down to see this box.



If you receive an **Alert**, you may make the change or not, depending on applicability. Click the alert to view details. You will have to click **Submit** again to ensure your review is submitted.



Your review has been submitted when you see the dialog box indicating success. If you do not see this box, your review is not yet submitted.



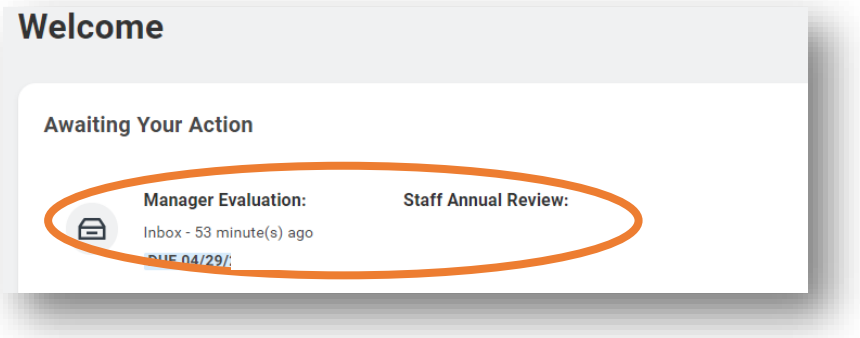
If the review is still in your **Action Items/Workday Inbox**, you have not successfully submitted.

ANNUAL FULL-TIME STAFF REVIEW: ACKNOWLEDGEMENTS

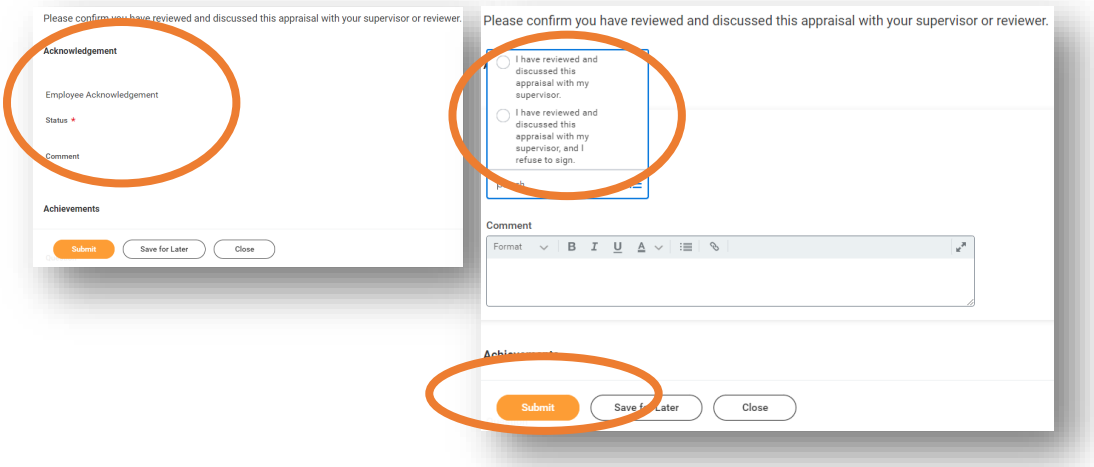
EMPLOYEE: REVIEW AND ACKNOWLEDGEMENT

From the Workday **Home/Welcome** page:

1. Launch the appraisal from your **Action Items/Workday Inbox.**



2. Select the appropriate acknowledgement **Status** from the drop-down menu. Add comments, if needed.

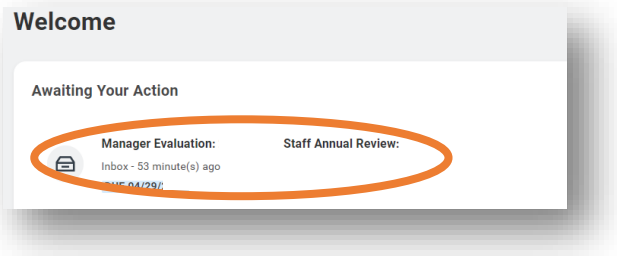


3. Click **Submit**.

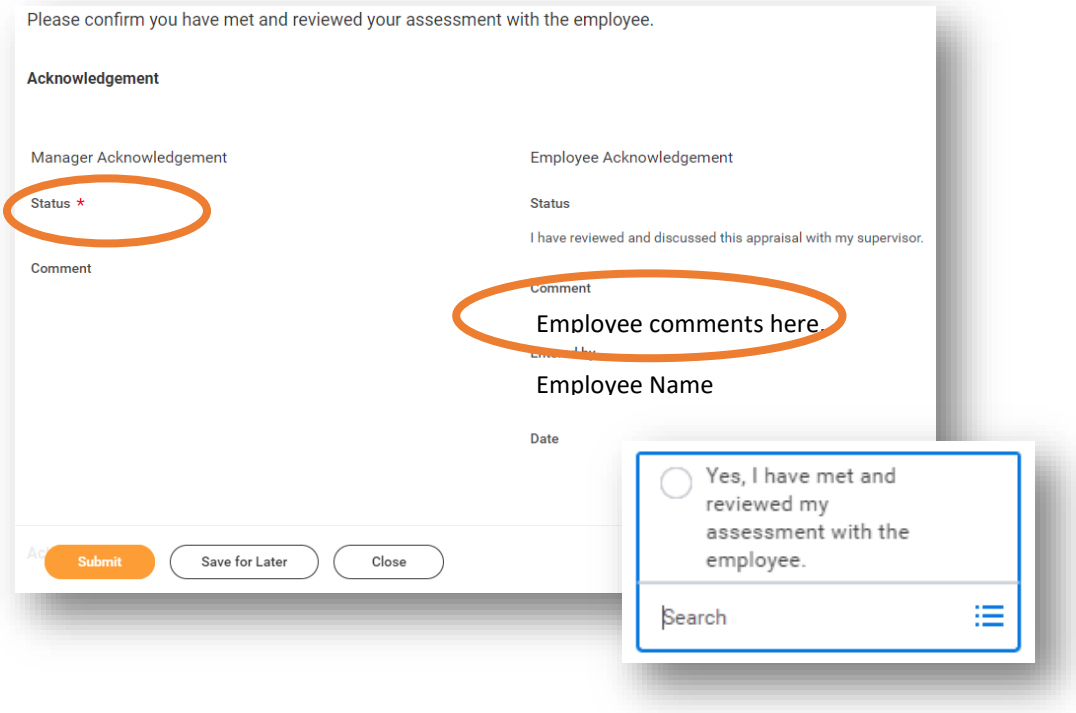
MANAGER: REVIEW, ACKNOWLEDGEMENT, AND FINAL SUBMISSION

From the Workday **Home/Welcome** page:

1. Launch the appraisal from your **Action Items/Workday Inbox.**



2. Carefully review the employee's comments. If the employee has written any concerning comments, please contact HR.

   Select the acknowledgement **Status** from the drop-down menu. Add comments, if needed.

3. Click **Submit**.