

# 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.*

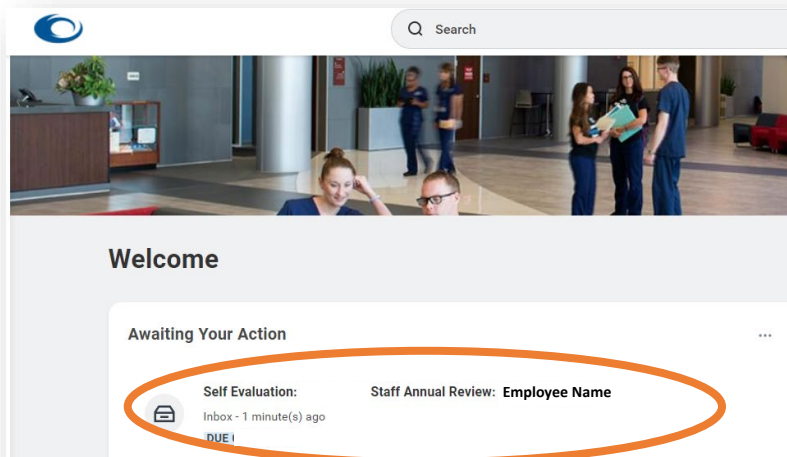
## ANNUAL FULL-TIME STAFF REVIEW: EMPLOYEE SELF-ASSESSMENT

### EMPLOYEE: COMPLETE SELF-ASSESSMENT

Launch Workday from [Collin.onelogin.com](https://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.



Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



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

The screenshot shows a performance review form. At the top, there is a progress bar and a dropdown menu labeled 'Achievements'. Below this, there is a section titled 'The process for the staff performance review is streamlined as follows:' with three bullet points: 'Employees provide input by way of self-assessments.', 'Managers provide feedback and overall ratings.', and 'Signatures: Employees and managers sign reviews electronically.' Below this, it states 'You are not required to complete this entire document in one sitting.' and 'Should you need assistance with the review or have questions, please contact Human Resources at 972.985.3783.' The main question is 'List your achievements for the performance review period in the comment box below.' Below the question, there is a section titled 'Employee Evaluation' with a sub-section 'Answer \*'. A red circle highlights the 'Answer \*' label. To the right of the question, there is a 'Pencil' icon in a red circle. Below the 'Answer \*' field, there is a 'Next' button.

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

The screenshot shows the same performance review form as above, but with the 'Answer \*' field expanded into a text editor. The text editor has a toolbar with options for 'Format', 'B', 'I', 'U', 'A', and a list icon. Below the toolbar, there is a list of three items: 'Achievement 1', 'Achievement 2', and 'Achievement 3'. A red circle highlights the list of achievements. Below the text editor, there is a 'Next' button.

Your screens and processes may vary



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

Performance Indicators ▾

Please select a rating for each performance indicator.

**MEETS EXPECTATIONS:** Successfully performs the essential job functions and effectively demonstrates competencies and core values. Performance is satisfactory in all major respects such as quality, timeliness, results, etc.

**EXCEEDS EXPECTATIONS:** Performance clearly and consistently exceeds job expectations. Initiates and completes exceptional work beyond job functions or demonstrates competencies and core values in an outstanding manner.

**NEEDS IMPROVEMENT:** Performance of essential job functions is ineffective or problematic. Inconsistent demonstration of competencies and core values. Employee may not be engaged and/or is not contributing to the job or the organization. Goals for improvement should accompany this appraisal to clearly identify.

**Employees:** Any rating of "Needs Improvement" or "Exceeds Expectations" requires supporting comments in the comment boxes.

**Managers:** All ratings require supporting comments in the comment boxes.

**NOTE:** Employees who do not supervise others should select the rating of "Not Applicable" for performance indicators (H) through (K). Managers should also select "Not Applicable" for performance indicators (H) through (K).

## 5. Scroll down. 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 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.

Competency

(A) ESSENTIAL FUNCTIONS

Category

Staff - Annual

Description

Demonstrates understanding of the job requirements and effectively applies that knowledge, follows processes and procedures, maintains skills and technical knowledge to perform competently.

Employee Evaluation

**Proficiency Rating \***

Definition

Comment

The screenshot shows a 'Competency' form with a 'Proficiency Rating' dropdown menu. The dropdown is open, showing options: 'select one', 'Meets Expectations', 'Exceeds Expectations', and 'Needs Improvement'. A pencil icon is circled in orange above the dropdown. The 'Proficiency Rating' label and the dropdown menu are also circled in orange. Below the main form, a smaller view shows the 'Proficiency Rating' dropdown and the 'Comment' text area, with the 'Comment' label circled in orange.

Your screens and processes may vary



- 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.**

Competency  
(H) EFFECTIVE HIRING

Category  
Staff - Annual

Description  
Understands and adheres to the college's policies and procedures for hiring staff and/or faculty; reviews interview questions with Human Resources prior to interviewing candidates; selects most qualified candidate, considering qualifications and employment laws.

Employee Evaluation

Proficiency Rating \*

Not Applicable  
select one  
Meets Expectations  
Exceeds Expectations  
Needs Improvement  
Not Applicable

- 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*

# Performance: Annual FT Staff Review Manager/Employee



*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.*

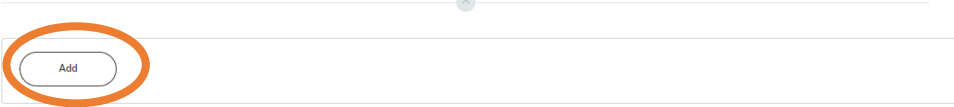
Please follow these steps to evaluate the completion of your 2022-2023 goals:

- 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.

**Goal Review**

Please select "Add Existing" and select your 2021-2022 performance review to select and pull in your 2022-2023 goals set in the 2021-2022 reviews. *This process must be completed for each goal.*  
Select the appropriate goal completion rating and add supporting comments if needed.

*NOTE: Leave this section blank if you do not have goals for this appraisal period.*



**Add Existing**

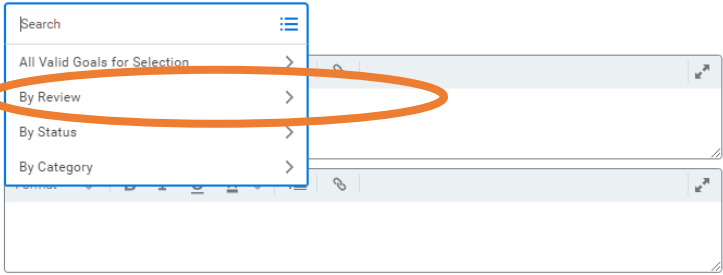
**Goal** \*

- All Valid Goals for Selection
- By Review**
- By Status
- By Category

**Description**

**Due Date** MM/DD/YYYY

**Category**



Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



Add Existing

Search

Goal \* < By Review

2021-2022 Staff Annual Review: >

Description >

Due Date MM/DD/YYYY

Category

Add Existing

Search

Goal \* < 2021-2022 Staff Annual Review:

Goal Title/Content

Goal Title/Content

Goal Title/Content

Goal Title/Content

Goal Title/Content

Due Date MM

Category

Employee

Back Next Save for Later Close

Goal Review

Please review goals for this performance review period. Select appropriate ratings and add supporting comments.  
NOTE: If the employee does not have goals for the performance review period, this section will be blank.

Goal \*  
Goal summary here  
Description  
Goal details here

Category  
Staff - Job Specific Goal

Due Date  
08/31/2022

Status  
Partially Complete

Employee Evaluation

Rating \*  
select one  
COMPLETED  
PARTIALLY COMPLETED  
NOT COMPLETED

Comment

Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



- 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.

The screenshot shows a 'Goal' form with the following fields and annotations:

- Goal**: A text area with the placeholder 'Enter SMART goal here.'
- Description**: A text area with the placeholder 'Additional details and information go here.'
- Category**: A dropdown menu with the instruction 'Select the appropriate staff goal category.'
- Due Date**: A date picker with the instruction 'Select an appropriate due date in 2023-2024.'
- Status**: A dropdown menu with 'select one' and a large orange 'X' over it, with the instruction 'Do not include a status.'

To the right of the form is a list of categories with checkboxes:

- Faculty - Professional Development
- Faculty - Service
- Faculty - Teaching
- Staff - Department Initiative
- Staff - Identifies with Collin College Core values
- Staff - Job Specific Goal

A search bar is located at the bottom of the category list.

Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



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

Supporting Documents ▾

Optional: Add supporting documents, if needed.

Employee

Add

Back Next

Supporting Documents ▾

Optional: Add supporting documents, if needed.

Employee

Evaluation Supporting Document (empty) ↻ ✓

File

Attach

Updated By (empty)

Upload Date (empty)

Comment

> Details

Back Next

Your screens and processes may vary

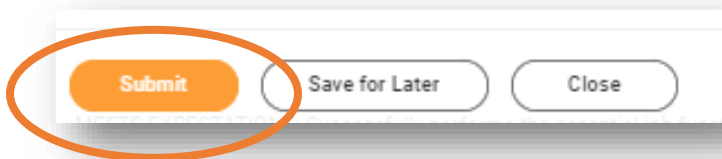


# Performance: Annual FT Staff Review Manager/Employee



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.

Achievements



Question

List your achievements for the performance review period in the comment box below.

Employee Evaluation

## Errors

- Error**  
The field Proficiency Rating is required and must have a value - Performance Indicators ((K) TEAM BUILDING)
- Error**  
The field Rating is required and must have a value - Goal Review
- Error**  
The field Rating is required and must have a value - Goal Review

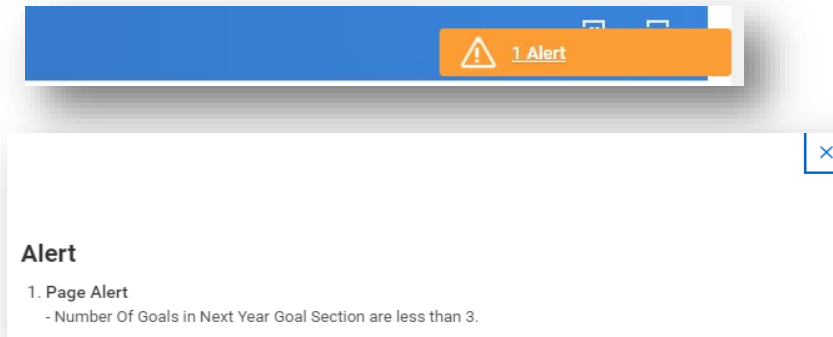
If you receive an **Alert**, you may make the change or not, depending on applicability. (For example, you may receive a warning that you have

Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee

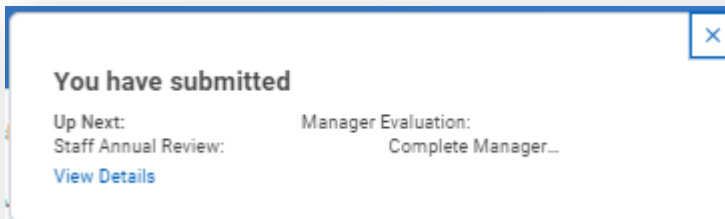


created fewer than three goals for 2023-2024. Not having three goals set may be appropriate if you and your supervisor set goals together during the appraisal meeting.) **You will have to click [Submit](#) again to ensure your review is submitted.**



**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.





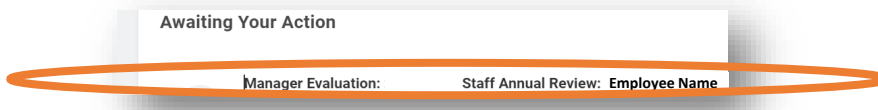
## ANNUAL FULL-TIME STAFF REVIEW: MANAGER'S EVALUATION

### MANAGER: REVIEW EMPLOYEE SELF-ASSESSMENT

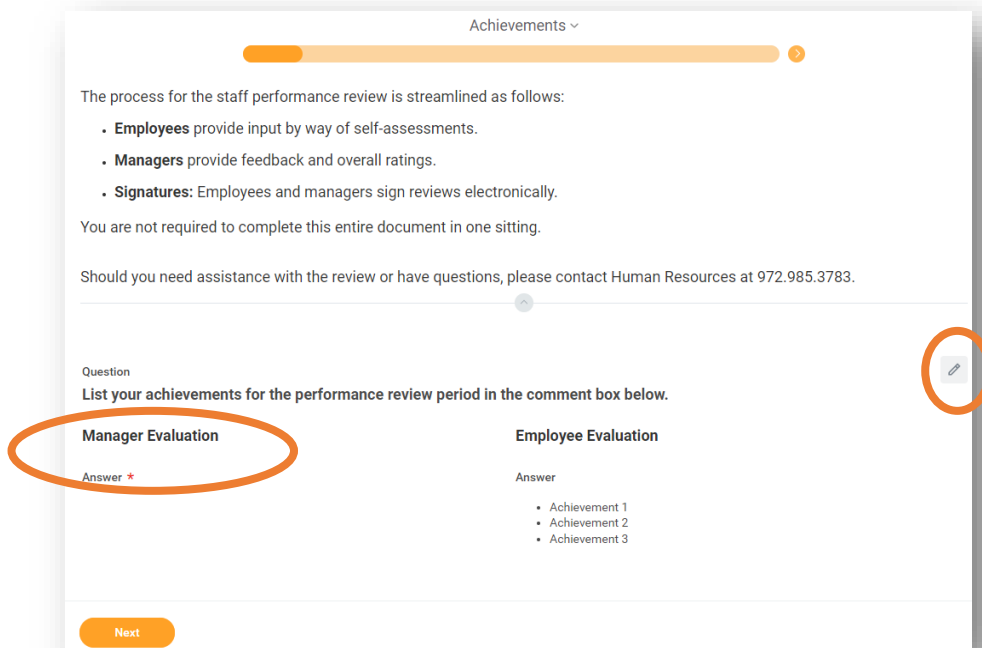
Launch Workday from [Collin.onelogin.com](https://collin.onelogin.com) or [CougarWeb > My Workplace](#).

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**.



Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



- 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.**

Competency  
(A) ESSENTIAL FUNCTIONS  
Category  
Staff - Annual  
Description  
Demonstrates understanding of the job requirements and effectively applies that knowledge; follows processes and procedures; maintains skills and technical knowledge to perform competently.

**Manager Evaluation**  
Manager Proficiency Rating \*  
Definition  
Comment \*

**Employee Evaluation**  
Employee Proficiency Rating  
Meets Expectations  
Definition  
MEETS EXPECTATIONS: Successfully performs the essential job functions and effectively demonstrates competencies and core values. Performance is satisfactory in all major respects such as quality, timeliness, results, etc.  
Comment

**Manager Evaluation**  
Manager Proficiency Rating \*  
Not Applicable  
Definition  
NOT APPLICABLE: Not a supervisor.  
Comment \*  
not a supervisor

**Employee Evaluation**  
Employee Proficiency Rating  
Not Applicable  
Definition  
NOT APPLICABLE: Not a supervisor.  
Comment

Your screens and processes may vary

from this document. 12

# Performance: Annual FT Staff Review Manager/Employee



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](mailto: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.*

The screenshot displays the 'Goal' and 'Manager Evaluation' sections of a performance review. The 'Goal' section includes fields for 'Goal summary here', 'Description', 'Goal details here', 'Category' (Staff - Identifies with Collin College Core values), 'Due Date' (08/31/2022), and 'Status' (Partially Complete). The 'Manager Evaluation' section has a 'Rating' field circled in orange, which is currently set to 'PARTIALLY COMPLETED'. An 'Employee Evaluation' section shows a 'Rating' of 'PARTIALLY COMPLETED'. A 'Comment' field is visible at the bottom of both sections. An inset window shows the 'Manager Evaluation' dropdown menu with options: 'COMPLETED', 'PARTIALLY COMPLETED', and 'NOT COMPLETED'. The 'COMPLETED' option is highlighted in blue.

Your screens and processes may vary

# Performance: Annual FT Staff Review Manager/Employee



- 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**.

The screenshot shows a 'Goal' form with the following fields and annotations:

- Goal**: A text area with the placeholder 'Enter SMART goal here.' and a rich text editor toolbar.
- Description**: A text area with the placeholder 'Additional details and information go here.' and a rich text editor toolbar.
- Category**: A dropdown menu. An annotation says 'Select the appropriate staff goal category.' To the right, a separate dropdown menu is shown with the following options:
  - Faculty - Professional Development
  - Faculty - Service
  - Faculty - Teaching
  - Staff - Department Initiative
  - Staff - Identifies with Collin College Core values
  - Staff - Job Specific Goal
- Due Date**: A date picker with the placeholder 'MM/DD/YYYY'. An annotation says 'Select an appropriate due date in 2023-2024.'
- Status**: A dropdown menu with 'select one' selected. An orange 'X' is drawn over this field with the annotation 'Do not include a status.'

Your screens and processes may vary

## Performance: Annual FT Staff Review Manager/Employee



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

Supporting Documents ▾

Optional: Add supporting documents, if needed.

Manager

Add

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.**

# Performance: Annual FT Staff Review Manager/Employee



Overall Rating ▾

Please select the overall appraisal rating for the employee which best describes a summary of the appraisal ratings and comments.

**NEEDS IMPROVEMENT** : Performance of essential job functions is ineffective or problematic. Inconsistent demonstration of competencies and core values. Employee may not be engaged and/or is not contributing to the job or the organization. Goals for improvement should accompany this appraisal to clearly identify.

**MEETS EXPECTATIONS** : Successfully performs the essential job functions and effectively demonstrates competencies and core values. Performance is satisfactory in all major respects such as quality, timeliness, results, etc.

**EXCEEDS EXPECTATIONS** : Performance clearly and consistently exceeds job expectations. Initiates and completes exceptional work beyond job functions or demonstrates competencies and core values in an outstanding manner.

Any rating of "Needs Improvement" or "Exceeds Expectations" requires supporting comments in the comment boxes.

NOTE: If an employee has received a Level II disciplinary action during the performance review period, the employee must receive an overall rating of "Needs Improvement."

Manager Evaluation

Rating ▾

- select one
- select one
- MEETS EXPECTATIONS
- EXCEEDS EXPECTATIONS
- NEEDS IMPROVEMENT

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.



# Performance: Annual FT Staff Review Manager/Employee



Employee Meeting Confirmation

Question  
Have you conducted a performance review meeting with the employee? Do not click "Submit" until you have done so.

Manager Evaluation

Rating \*

select one

select one

Yes

Back Next

Submit Send Back Save for Later Close

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.



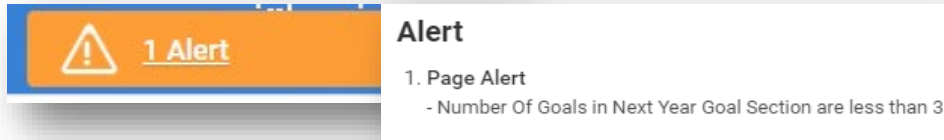
**Alert**

1. Page Alert  
- Number Of Goals in Next Year Goal Section are less than 3. (Manager Performance Evaluation)

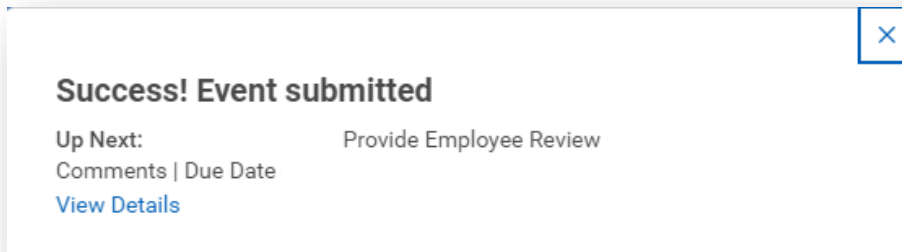
# Performance: Annual FT Staff Review Manager/Employee



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.

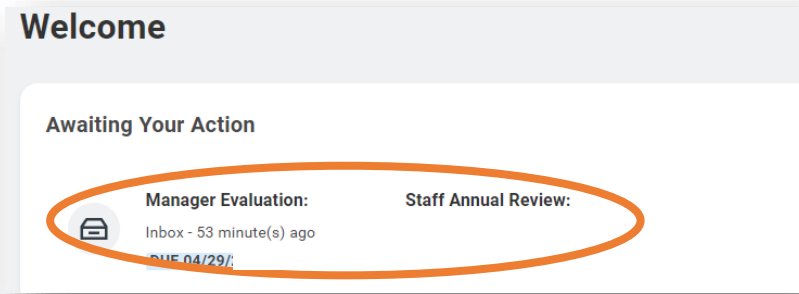


## ANNUAL FULL-TIME STAFF REVIEW: ACKNOWLEDGEMENTS

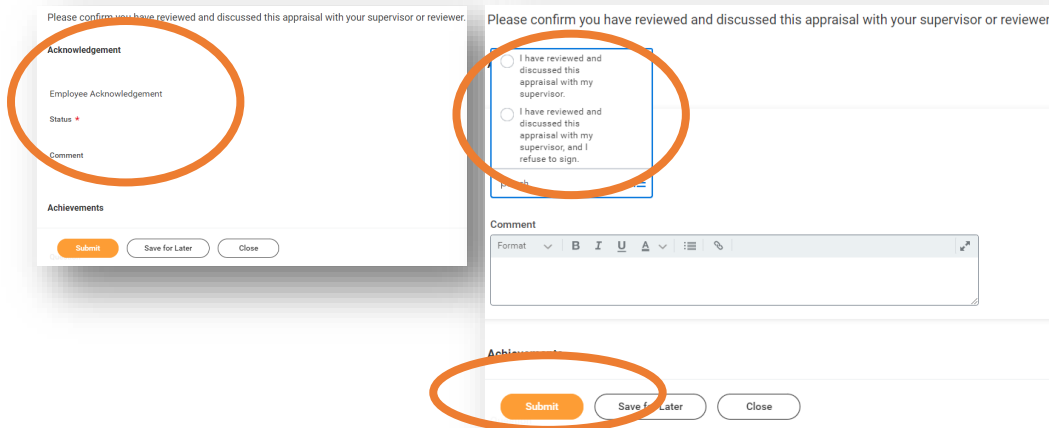
### EMPLOYEE: REVIEW AND ACKNOWLEDGEMENT

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**.

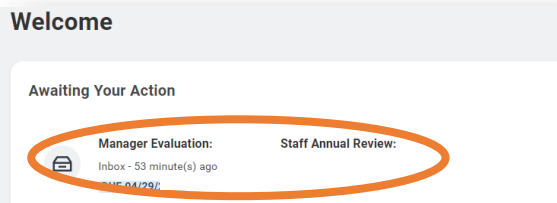
# Performance: Annual FT Staff Review Manager/Employee



## 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**.

Please confirm you have met and reviewed your assessment with the employee.

**Acknowledgement**

Manager Acknowledgement	Employee Acknowledgement
Status *	Status
	I have reviewed and discussed this appraisal with my supervisor.
Comment	Comment
	Employee comments here
	Employee Name
	Date

At the bottom of the form are three buttons: **Submit** (orange), **Save for Later** (white), and **Close** (white).

A pop-up dialog box is shown in the bottom right corner with a radio button and the text: "Yes, I have met and reviewed my assessment with the employee." Below the dialog box is a search bar with the text "Search" and a menu icon.

Your screens and processes may vary