

BEGINNING YEAR PERFORMANCE REVIEW TEMPLATE

THIS GUIDE IS FOR: MANAGERS

This guide provides the steps for completing the beginning year performance review in Workday@OK after the beginning year performance review template has been launched by agency HR Partner or manager based on your agency's business process.

1. Once logged into Workday@OK, navigate to **Awaiting Your Action** tasks. Select **Initial Set Content** task for the desired employee. Next, select the full screen icon to expand your view. **Note:** If you don't receive a task for an employee, check to ensure the previous template has been closed. The previous review template must be closed before the next review template can be launched.

Example: For the 2025 beginning year template to be launched, the 2024 year-end template for the previous review period must be closed.

2. Next, select the **Go to Guided Editor** that provides a step-by-step guide or **Go to Summary Editor** where you can edit everything on one page.
3. To add a responsibility, select the **Add** button. The content for responsibilities, responsibility weights and competency weights will pull in from previous template that was completed. Review the content for each responsibility, responsibility weight and competency weight. To edit the content, select the **pencil icon**. To delete a responsibility, select the **X** icon. Weights for the responsibility section must equal 100 and weights for the competency section must equal 100. **Note:** If an employee transferred from another agency then it will pull content from the most recently completed template.
4. Select **Submit**. Once submitted, the employee will receive a **Set Content** task in their Workday@OK inbox to review and approve or send back if needed.
5. Once approved by the employee, it will be sent to the manager's manager to review and approve or send back to employee's manager to make any changes if needed. Once approved by the manager's manager, the beginning year performance review template is complete.

To **View** or **Create New PDF** of an employee's performance review, navigate to the employee's **Performance** section from their worker profile and select **Performance Reviews** tab located on the top.