PERFORMANCE MANAGEMENT FOR MANAGERS
THIS GUIDE IS FOR: MANAGERS

VIEW WORKER PROFILE
In Workday@OK, a worker profile provides managers with access to employee's performance information. From this page, managers may view **Talent** and **Performance** metrics for their employees.

1. Beginning on the Workday@OK homepage, select **View All Apps → My Team Management.**
2. Select the name of an employee to view their **Worker Profile.**

VIEW PERFORMANCE PROFILE
Select **Performance** to view an employee's performance profile. Aspects of the profile include, but are not limited to, individual and achieved goals, performance reviews and development items and plans.

VIEW CAREER PROFILE
Select **Career** to view an employee's career profile. Aspects of the profile include, but are not limited to, certifications, achievements and talent cards.

VIEW AND PROVIDE FEEDBACK
Select **Feedback** to view received, requested and feedback provided by the employee.

ASSESS POTENTIAL
Select **Action → Talent → Assess Potential**. Follow the prompts and instructions on the screen and select **Submit** when ready.

START DISCIPLINARY ACTION
Select **Action → Talent → Start Disciplinary Action.** Select the appropriate **Review Template** (e.g., Employee Engagement, Involuntary Demotion, Suspension without Pay, Termination, or Written Reprimand), **Disciplinary Action Reasons** based on the review template and provide the **Period Start/End Date.** Select **Submit** to launch the guided tour with additional questions.

PERFORMANCE REVIEWS
When the agency HR Partner starts the performance review for the organization, managers will receive performance review tasks for their employees. However, managers may also initiate the Performance Review Process on their direct reports based on the agency's business process.

Step 1: Initiate Performance Review
1. Beginning on the Workday@OK homepage, select **View All Apps → My Team Management.**
2. Select the name of an employee to view their **Worker Profile.**
3. **Select Performance → Performance Reviews → Start Performance Review.** Workday@OK will open a new window. Please consider the below options:

a. **Employee:** Workday@OK will populate this with the name of the worker.
b. **Review Template:** Select the appropriate template (e.g., beginning year, mid-year or year-end)
c. **Period Start/End Date:** Enter the start and end date for the template period. **Warning**: The start date must be after the previous template period has closed. If the template periods overlap, the responsibilities and their weights and the competency weights will not carry over to the new template.

Example:
- Beginning year template: 07/1/2024 – 11/30/2024
- Mid-year template: 12/1/2024 – 5/31/2025
- Year-end template: 6/1/2025 – 6/30/2025

4. Select **Submit.**

For more detailed instructions please review the following user guides: beginning year, mid-year, year-end templates.

CREATE CHECK-IN

1. Beginning on the Workday@OK homepage, navigate to and select the **Search Bar.**
2. Type and select the report **My Check-ins.** Select **Create Check-In button.** Workday@OK will open a new page. Consider the following items in completing the form.
   a. **Participant:** Select **Participant → My Team → Employee Name.**
   b. **Planned for:** Enter the intended date of the check-in.
   c. **Description:** Add a description for the check-in (if necessary).
   d. **Manage Topics:** Select **Add** to include specific topics to cover during the meeting.
3. Select **Save.** If the **Notify Participant** check box was selected, the employee will be notified.