

YEAR-END PERFORMANCE REVIEW TEMPLATE

THIS GUIDE IS FOR: MANAGERS

This guide provides the steps for completing the year-end performance review in Workday@OK after the year-end 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 **Review 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 year-end template to be launched, the 2025 mid-year template 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. Review the content to see if edits are needed to the performance review responsibilities or weights. **Warning:** If no changes are needed, DO NOT select **Submit**. Instead select the **gear icon** at the top of the task and select **Skip This Task**. Select **OK**.

If changes are needed, select the **pencil icon** where you can make edits, then select **Submit**. **Warning:** Selecting **Submit** will send the review back through the approval steps to the employee and manager's manager.

4. Next, the employee will receive a **Self-Evaluation** task in their Workday@OK inbox to complete. The employee is required to enter a rating for each responsibility and competency. **Note:** Based on the individual ratings selected, it will auto-calculate the overall rating. **Optional:** The employee may provide a comment on individual responsibilities and competencies, if desired. In addition, the employee can provide supporting documents that support their overall rating and comment.
5. Once the employee completes their self-evaluation, you will receive the **Assess Potential** task in your Workday@OK inbox. This task is to assess the potential of the employee on their current career progression (Potential), likelihood of leaving (Retention), and the impact to your team if they were to leave (Loss Impact). **Important Note:** The ratings provided will not be viewable to your employee and will not appear on the performance evaluation or their employee profile; however, the ratings may be used to assist your agency with employee retention initiatives.

This is an optional step and you are not required to enter ratings for **Potential, Retention, or Loss Impact**.

6. Select **Complete**.
7. Next you will complete the **Manager Evaluation** task in your Workday@OK inbox. You are required to enter a rating and comment for each responsibility and competency. **Note:** Based on the individual ratings selected, it will auto-calculate the overall rating. In addition, you have the rating option, **Not Rated**, to choose so that item will not be factored into the overall rating.

Optional: You may provide supporting documents that support your ratings and comments by selecting the **Add** button under the **Supporting Documents** section.

8. Select **Submit**. Once submitted, the manager's manager will receive a **Manager Evaluation** task for the employee in their **Awaiting Your Action** tasks. The manager's manager will review and approve or send back to the employee's manager to make any changes if needed. Once approved by the manager's manager, it will be sent to the agency HR Partners' Workday@OK inboxes to review, approve or send back.
9. Once approved by an agency HR Partner, you will receive a **Schedule Evaluation Meeting with Employee** task in your **Awaiting Your Action** tasks. The purpose of this step is to give the manager control over when the employee sees the manager's overall rating in Workday@OK. Upon submission of this To Do task, the ratings and comments will be sent to the employee to review, provide any additional comments, and complete the **Employee Acknowledgement**.
10. Once the employee completes the acknowledgement, you will receive a **Manager Evaluation** task in your **Awaiting Your Action** tasks. You can review any additional comments the employee provided and complete the **Manager Acknowledgement**. **Optional:** You may provide additional comments if desired.
11. Select **Submit**. The year-end 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.