

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

In Workday@OK, managers will receive a notification regarding the performance review process for employees. Employees will receive their self-evaluation and you as a manager will be able to view the results of that evaluation. However, managers may also initiate the Performance Review Process ad hoc.

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., ad hoc, midyear or year-end)
- c. **Period Start/End Date:** Enter the start and end date for the performance review period.
4. Select **Submit**. If submitting an ad hoc or year-end review, you will need to enter responsibilities with weights and weight competencies during the **Set Content** step.

Step 2: Complete Manager Evaluation

1. Once your employee has completed their **Self Evaluation**, you will receive an inbox notification to **Complete Manager Evaluation**.
2. Select **Go to Guided Editor** for a step-by-step guide or select **Go to Summary Editor** to edit everything on one page
3. Provide ratings and comments.
4. Select **Submit**. Once submitted, HR will approve. It will then go back to the manager with a reminder to hold a meeting to discuss with the employee. When the manager submits the reminder step, the employee will receive a notification in their inbox and will need to acknowledge and will also be able to provide comments. Then the manager will receive it back to acknowledge and make comments if desired.

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.