Hello and thank you for joining us for this training on how to complete a manager evaluation in Workday. You'll find this to be similar to previous years, but there have been some updates that we'd like to share with you. As you'll notice, I am in a training platform for Workday, I'm signed in as Carla, the manager for Elaine, and we are looking at her inbox. In her inbox, there's an item labeled "Manager Evaluation Staff Review FY 24," and then there's the employee's name. Over here is a description of the task at hand, it's the manager's evaluation guide, which gives a quick summary of the sections that you'll be going through and then a reminder to provide balanced constructive feedback, acknowledging achievements, addressing challenges, and suggesting actionable steps for growth in the future. So, let's click the "Get Started" button.

There's some guidance text for you to read, and as we start the process, it opens up into primary work responsibilities. There's a note and help text at the beginning of primary work responsibilities that helps us remember some biases that may affect our rating and our annual performance reviews as a manager. Please be aware of leniency or severity bias, which can cause reduced credibility or inaccurate performance records, or demotivate highly... high performers.

So, when everyone receives a high rating regardless of performance, motivated employees could feel demotivated, and that would be like a severity or leniency bias.

Recency bias relates solely to what's happened recently and not taking the whole year into account. The Halo and Horn of biases look at some positive traits and accomplishments of an employee that you lean too heavily on, or the opposite that, the Horn effect, where there's some kind of negative trait that sort of disproportionately affects the entire evaluation.

So, please familiarize yourself with these biases before embarking upon this process. Additionally, you'll find at the top a link to the HRSTM website Performance Management page.

Primary work responsibilities, as you remember from last year, you see we have two questions. One is about the based on primary work responsibilities, please comment on what's gone well and indicate the most notable accomplishments. These are required comment areas, and you can see next to the manager's space is the employee's space. The word "test" is what we added in for this test, so that's where the employee's text would show up, and this comment box is where you would add your comments. This year, the annual review process has three graded sections: primary work responsibilities, that we're working on right now, individual performance goals, as they're called, and competencies. They're all worth one-third. If there are no individual performance goals, then that percentage will be removed, and the competencies and the primary work responsibilities will be weighted at 50% each. So, we'll see that as we walk through. As you can see, you can see the employee's rating for their self-evaluation, and then the manager would select a rating that they feel is most appropriate. As you can see, new this year are the self-fulfilling descriptions for the rating descriptions. So, as you select a rating, those descriptions pop up to help you identify who actually qualifies for what rating. For this example, we use "fully meets."

The next item that pops up is about the required training affirmation. While this has no weight, in future years, we would like it to have some weight. So, more news on that, but this year, it does count for zero percentage of the score. But we are asking individuals to confirm and affirm that they have completed the annual required training. As you will see, there's some instructional help text above. I'll zoom in for you. If you were to go into Workday and search this at the very top, you will get a report of all your employees and the classes that they have completed. When doing so, you'll get a question about the required training option as a tick mark or a check mark. I recommend you do not choose that, so you get everything in case something's been miscategorized within the system. So, leave that open, and you'll be able to see everything that has been accomplished. To identify what needs to be done, you see down here at the bottom, it says to learn what classes are required, click here. That's on the required training page, and also to access any of the classes is a Workday, click right here. If you have any questions, you can also reach out to HR help desk or an HRIC. In this case, we're going to say yes, the person has completed. So, I could have checked, I can run the report, and I can go look and say, "Oh yes, they have done the required training assigned to this position." If no, then we do ask that you identify and select and provide some information as to why they weren't completed and the plan to complete them. So, if it's a no, we do request that you add in some information on what happened. And if a yes, then no comment is required.

As you can see here, the next item is individual/performance goals. In this example, there are no performance goals built-in, but we wanted to highlight that the top of the page provides help text on how to manage your individual performance goals. While they are strongly recommended, they are not required to be added into Workday. So, you might have them apart from Workday here. You could add them in if you would like if they're already previously discussed. And if not, if there are no goals listed, and/or those goals are not rated, this will then zero out and not negatively affect or impact the evaluation. So, as you can see, if there are goals, it'll add to one third. So, it'll be primary work responsibilities, one third, individual performance goals, one third, and competencies, one third. When there are no goals, it'll be 50/50 for primary work responsibilities and then, therefore, competencies. In this case, since there are no goals, we'll move forward.

Competencies. This year, we want to highlight the importance of connecting our College competencies and our Montgomery College competencies to our Montgomery College's Vision, Mission, and Value statements. So please take a minute to familiarize yourself and review the mission statement, the vision statement, and our value statements, and understand how these competencies are manifested or how we use these competencies to manifest this vision, mission, and value statement. Additionally, in the help text is a link to the Performance Management webpage. This year, similar to last year, you will see, and I'm going to zoom out for some clarity, you will see you have to rate each competency. Much like the previous screens, the rating descriptions self-populate as you select a rating. So, for communication, you would select one. For every different competency, you would select one, and then they pop up for your guidance. And also, to the right, you can see what the employee rated themselves at. Last one being teamwork and collaboration. There you can see populates the broader calculation. So, here it says the weight would be one third. If there are goals, it is one third. Behind the scenes, since there are no goals, this will calculate 50/50. When it does the overall, it'll be 50/50 because there are no goals. So, this is the competencies.

The next item is feedback on those competencies. We do request that you provide feedback overall on all the competencies, both on providing feedback on the strengths in that space and then also areas of opportunity where the individual could grow or improve. So, you can see the employee's answers are there to the right. There's a couple of different ways to move through this process. You can click the tab, and you can jump to different sections. Or, as I was doing earlier, you can go to the next button. In this example, we have professional development goals. These are not rated, and in our training environment, there are no goals added here. This is a space where you and the employee can look at, well, what's going on and what can this person do for their career to be a better employee, to develop themselves professionally, and then what resources? And I encourage you to have that conversation, what resources are available that we can help align with the employee to help them move forward in their career, whatever those goals might be.

The next section would be feedback. Any feedback collected via Workday throughout the year would populate here, as well as supporting documents. You can add supporting documents here, and if the employee has added any, they will populate here for your review. You can always click next to get to the next section. I'll zoom out for a second so you can see the overall. So, here we can see this overall fully meets was the calculation that came out. If it's something less than fully meets, then a comment is required. Otherwise, a comment is not required. So, here we can see a comment is not required. This is automatically calculated to the rating based on above. If you don't agree with this outcome, then please go above and adjust your ratings accordingly so that you can communicate fully with your employee in regards to their primary work responsibilities, their goals, and the attainment of our competencies.

Our next item would be just the standard review. You'll see that it's both sides, the employee and the manager. They're all down here for you to review, and you get at the very bottom the rating, and then also the submit button. Please remember that the annual review process is a two-step submit process. When you click the first submit button, it locks in your review with HR and then asks you to speak directly with your employee to meet with them and have a performance review meeting. There's a manager preference here that you can decide. You can submit this, lock it in, have your employee conversation meeting with your employee, and then send it to the employee for them to acknowledge. Or, if you do that, it'll be troublesome. You have to reach out to HR to make any changes or updates or corrections that might have come out of your performance conversation with your employee.

If you would prefer to have your performance conversation with your employee, and then perhaps edit and make changes to comments or ratings before you submit, then don't hit submit now because this is a double submit process. Therefore, if you would like to meet with your employee first to discuss things before you launch into your annual review one, you would save for later. So, let's click save for later and see what happens. When we save for later, it's waiting for submission. We go back to her inbox. This is back to Carla's inbox here. It is sitting here and says, "Let's get started," and everything is saved. So, as you can see, the test, the comments are saved, the ratings are saved, and you can review this information with your employee. You can also use the print functionality like I did right here. Let me show you how that works.

Push this button right here. It says "Print review document" is being generated. That'll generate, and then it'll land in my reports task, so you can find that in your inbox. And, if you would like some kind of printable review for to have part of your conversation in person. If not, you can just review the information while you're both there in person and have it just on your computer.

Nevertheless, the first submit, whether you've met with the employee first or not, will then bring you to this page that says "Event submitted. Okay, great. Next up, meet with your employee." On this page, you can also find a printable employee review. But don't forget, if you hit the first submit, it locks it in, and then you'll have to reach out to HR to resend it back to you if you need to make changes and adjustments past from the meeting that you've had in person with your employee. Manager preference, there, we would prefer that if you submit it and lock it in, that you don't reach back out to HR to send it back. That should be a rare circumstance.

Now, after you've met with your employee and you submit again. So, here it is, you submit again, and what happens? It will go to the employee for their confirmation, and then when the employee, acknowledgment is what it's called, when the employee acknowledges it, it'll come back to you to cross acknowledge, with or without comments. Please notice that when you acknowledge, you are acknowledging any comments also that they have written. It's very important to remember that when... It's very important to remember that when an employee goes to acknowledge, they are not agreeing or disagreeing with the review. They are merely acknowledging that the employee has had a conversation with their direct supervisor about their performance and review.

So, if you have any questions, please reach out to the HR help desk or to your HRIC. There are links along the way, and I hope you found this helpful. Thank you, and have a nice day.