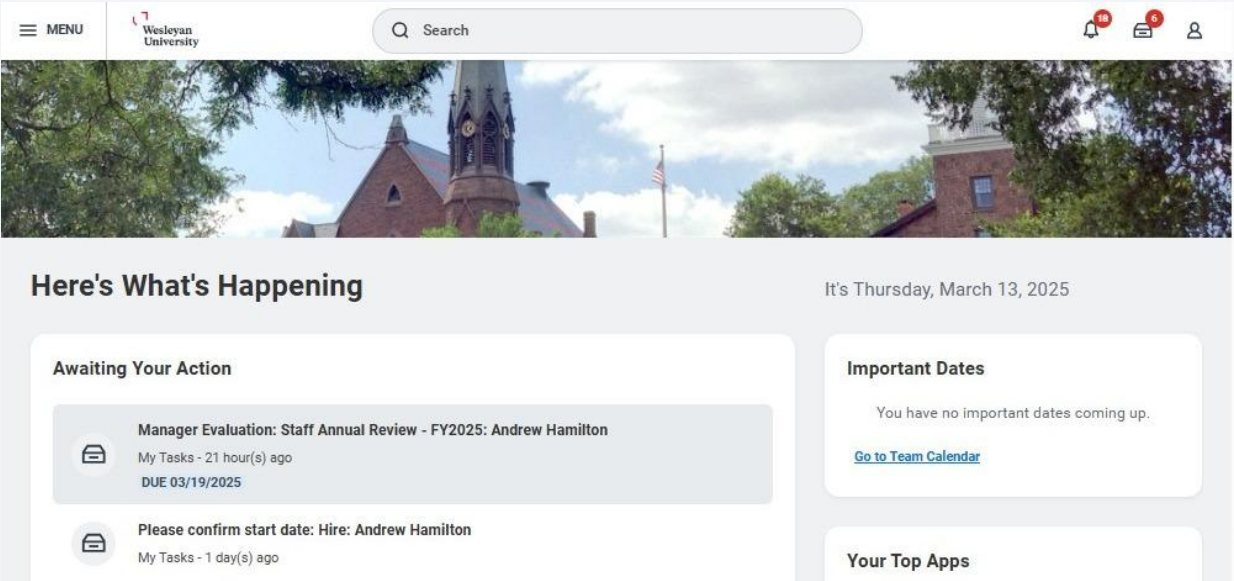


Annual Staff Performance Review - Supervisor Overview

Completing the Annual Review Form for a Direct Report

1 Navigate to Workday.



The screenshot shows the Workday dashboard for Wesleyan University. At the top, there is a navigation bar with a 'MENU' icon, the Wesleyan University logo, a search bar, and notification icons for 18 alerts and 5 messages. Below the navigation bar is a banner image of a brick building with a steeple. The main content area is titled 'Here's What's Happening' and includes the date 'It's Thursday, March 13, 2025'. There are three main sections: 'Awaiting Your Action' with two tasks, 'Important Dates' with a message that there are no dates coming up and a link to 'Go to Team Calendar', and 'Your Top Apps'.

Awaiting Your Action

- Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton**
My Tasks - 21 hour(s) ago
DUE 03/19/2025
- Please confirm start date: Hire: Andrew Hamilton**
My Tasks - 1 day(s) ago

Important Dates

You have no important dates coming up.

[Go to Team Calendar](#)

Your Top Apps

2 Click on the **Manager Evaluation** task in your inbox.

**This task will only appear once your direct report has submitted their self-evaluation form.*

Here's What's Happening

Awaiting Your Action



Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

My Tasks - 21 hour(s) ago

DUE 03/19/2025



Please confirm start date: Hire: Andrew Hamilton

My Tasks - 1 day(s) ago



Please confirm start date: Hire: Akila Amaratunga

My Tasks - 1 day(s) ago

3 Click **Get Started**.

**The questions in this section are a guide to help supervisors start the annual performance review conversation. Recorded answers to these questions are not required.*

The screenshot shows a web interface for a 'Manager Evaluation' task. At the top, it says 'Sandbox Preview - wesleyan_preview' and 'On behalf of: Samantha Walsh'. The Wesleyan University logo is visible. A search bar and notification icons are in the top right. The main content area is titled 'Complete Manager Evaluation' and 'Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton'. It shows a review period of '07/01/2024 - 06/30/2025'. Below this, there is an introductory paragraph about the Annual Performance Review. A section titled 'Questions to guide the conversation with your staff:' lists five bullet points: 'How has this year been for you?', 'What was your best day? What was your worst day?', 'Does the position still meet your expectations? If not, what are the areas or expectations that have changed?', 'How can I support or help you in your role?', and 'What areas do you need additional training or guidance?'. A final paragraph states 'Your feedback is crucial for the staff member's ongoing performance and development.' At the bottom, there is a prominent yellow 'Get Started' button.

4

Current Goals: Current goals entered in the goals area in the performance section on the staff member's profile will automatically roll into the annual review form. Staff and supervisors can update any section of the goal (i.e., goal, description, dates, status, milestones) on the review form.

Goals not listed in the goals area as of April 1 can be added to the review form.

**Goal changes on the review form will be reflected in the goals area once the review form has been finalized.*

Employee Comments should be reviewed.

Supervisors can then add their own remarks in the Manager Comment section.

Union Staff: Union members do not enter goals so this section will not appear on a union member's review form.

Click **Next** to move to the next section.

understand metrics for each area

Create monthly report template 11/01/2024 × Completed

Manager

Comment * Normal B I U A :: [Icons]

Andrew has successfully improved the efficiency of HR reporting with this monthly report. Colleagues have commented on Andrew's willingness to learn, communication and flexibility.

Employee

Comment This was an amazing experience! I learned so much from my colleagues. The monthly report has been created and maintained over the past few months. Colleagues have commented how helpful this report has been to them and their work. I've also received positive feedback from HR leadership on the accuracy

> History

Back Next Save ...

5

Future Goals: Staff and supervisors can add goals and goal details for the upcoming fiscal year.

**Goals added on the review form will be reflected in the staff member's goals area once the review form has been finalized.*

If goals have not been identified, you can skip this section.

Click **Next** to continue to the next section.

The screenshot displays a web application interface for setting future goals. On the left is a vertical sidebar with a list of sections: Current Goals, Future Goals (highlighted with a blue bar), Core Responsibilities and Contributions, Supervisor Accomplishments, Professional Development, Areas of Concern, Supporting Documents, Overall Performance, and Review and Submit. The main content area is titled 'Goal' and contains several input fields: a text area for the goal name (containing 'Recommend ways to improve reporting requests.'), a text area for the description, a date picker for 'Due Date' (set to 12/31/2025), a dropdown for 'Category', a dropdown for 'Status' (set to 'Not Started'), and a dropdown for 'Track By' (set to 'select one'). Below these fields is a 'Milestones' section with a table header: *Milestone, Due Date, Status. The table currently shows '0 items' and 'No Data'. At the bottom of the form are four buttons: 'Back', 'Next' (highlighted with a yellow circle), 'Save', and a three-dot menu.

6

Core Responsibilities and Contributions: Supervisors must provide comments on how the staff member met their core responsibilities this year and ways they contributed to the success of the department, division, and/or university.

**Core Responsibilities are no longer listed in the staff member's profile. To review core responsibilities, supervisors can review staff job description through WesPortal under Manager's Toolbox.*

Employee Comments should be reviewed.

Supervisors can then add their own remarks in the Manager Comment section.

Click **Next** to move to the next section.

The screenshot displays the 'Complete Manager Evaluation' interface. On the left is a navigation sidebar with the following items: Current Goals, Future Goals, Core Responsibilities and Contributions (highlighted with a blue bar), Supervisor Accomplishments, Professional Development, Areas of Concern, Supporting Documents, Overall Performance, and Review and Submit. The main content area shows two evaluation questions. The first question is 'Core Responsibilities: What are specific examples of how the staff member met their core responsibilities and the expectations of their position?'. It has two answer boxes: 'Manager' and 'Employee'. The 'Manager' answer box contains the text: 'Consistently ensures that HR data is organized and accurate, showing a strong commitment to detail. While there have been occasional discrepancies, the overall quality of data management has been exceptional and has improved over the evaluation period.' The 'Employee' answer box contains the text: 'This year, I have consistently met and, in some cases, exceeded my responsibilities in my role. I focused on maintaining the integrity and accuracy of the data, ensuring that all systems were updated in a timely manner and that I provided accurate and actionable reports to the HR team. One of my key accomplishments was enhancing the efficiency of data processes by identifying areas for improvement and automating several routine tasks, which led to a noticeable reduction in manual work. This optimization not only improved our workflow but also contributed to faster report generation and more accurate insights for HR decision-making.' The second question is 'Contributions: What are examples of ways the staff member contributed to the success and mission of the department, cabinet area, and/or university?'. It also has two answer boxes: 'Manager' and 'Employee'. The 'Manager' answer box contains the text: 'Wonderful to see Andrew meeting new people and getting involved in other areas on campus.' The 'Employee' answer box contains the text: 'This year, I participated in SAGES, Wesleyan's Campus Sustainability Committee.' At the bottom of the interface are three buttons: 'Back', 'Next' (highlighted with a yellow circle), and 'Save', along with a menu icon (three dots).

7

Supervisor Accomplishments: If the staff member supervises others, supervisors can provide comments on the staff member's leadership contributions.

If the staff member is not a supervisor, click **Next** to skip this section.

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025



- Current Goals
- Future Goals
- Core Responsibilities and Contributions
- Supervisor Accomplishments
- Professional Development
- Areas of Concern
- Supporting Documents
- Overall Performance
- Review and Submit

Supervisor Accomplishments

Question What are examples that demonstrate the supervisor's leadership skills and how they contributed to the success of their direct report(s)? If the staff member is not a supervisor, please skip this section.

Manager

Answer

Normal **B** *I* U

Employee

Answer

Back

Next

Save

...

8

Professional Development: Supervisors must provide comments on how the staff member developed their job-related skills and knowledge this year and where they would like the staff member to develop further next year. Strategies and ways to support this development must be outlined.

Click **Next** to move on to the next section.

Complete Manager Evaluation

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025

- Current Goals
- Future Goals
- Core Responsibilities and Contributions
- Supervisor Accomplishments
- Professional Development**
- Areas of Concern
- Supporting Documents
- Overall Performance
- Review and Submit

Professional Development

Question Professional Development: What are examples of ways the staff member continues to build their job-related skills and knowledge?

Manager

Answer * Normal | B | I | U | A | :: | [Link] | [Image]

Andrew has brought the skills he learned in the data analytics course into his work and it has been exciting to witness the improvements he has been able to implement to the reporting functionality on the team.

Employee

Answer This year, I completed a relevant course on advanced data analytics, which allowed me to improve my technical skills and contribute more effectively to the team.

Question Future Professional Development Goals: What are areas for development for the staff member and ways in which professional growth will be supported?

Manager

Answer * Normal | B | I | U | A | :: | [Link] | [Image]

Learning more about AI-powered tools would be a great areas to develop further in. We will look at training sessions together as well as talk to our partners in ITS to see what they recommend or if any cross-training can occur.

Employee

Answer Gain proficiency in an AI-powered HR tools (e.g., AI-driven analytics platforms, predictive modeling tools, automated recruitment software) by the end of the year.

Back | **Next** | Save | ...

9

Areas of Concern: If areas of improvement were discussed with the staff member over the past year, supervisors should document these concerns in the areas of concerns section. Supervisors should summarize the improvement areas, what strategies have been used to address the concern, and areas that need to continue to be worked on in the upcoming year.

If the staff member did not have any concerns, supervisors can skip this section.

Click **Next** to go to the next section.

The screenshot displays a web-based form for a 'Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton'. The left sidebar contains a navigation menu with the following items: Current Goals, Future Goals, Core Responsibilities and Contributions, Supervisor Accomplishments, Professional Development, Areas of Concern (highlighted in blue), Supporting Documents, Overall Performance, and Review and Submit. The main content area is titled 'Areas of Concern' and contains a question: 'Has the staff member had any areas of concern addressed during the past year? If yes, please briefly summarize the steps that were taken to address the area(s) of concern and any areas that need to continue to be reviewed in the upcoming year. If not applicable, please skip this section.' Below the question is a text input field with a rich text editor toolbar. The answer provided is: 'Occasional data input discrepancies have occurred, which have affected reporting. However, we've discussed strategies and auditing procedures to ensure mistakes no longer occur. We will continue to work on this area over the next year to see how we can refine this process further'. At the bottom of the form, there are three buttons: 'Back', 'Next' (highlighted in yellow), and 'Close'.

10 Supporting Documents: Supervisors can add documents to the review form.

Supervisors can also view documents the staff member has uploaded.

If this section is not applicable, supervisors can skip this section.

Click **Next** to go to the next section.

The screenshot shows a web interface for a 'Complete Manager Evaluation'. On the left is a sidebar with a navigation menu containing the following items: 'Current Goals', 'Future Goals', 'Core Responsibilities and Contributions', 'Supervisor Accomplishments', 'Professional Development', 'Areas of Concern', 'Supporting Documents' (highlighted with a blue bar and a blue circle), 'Overall Performance', and 'Review and Submit'. The main content area is titled 'Supporting Documents' and contains a sub-section for 'Manager'. Below this is a large dashed box with the text 'Drop files here' and 'or' above a 'Select files' button. At the bottom of the interface is a navigation bar with four buttons: 'Back', 'Next' (highlighted with a yellow circle), 'Save', and a three-dot menu icon.

11

Overall Performance: Supervisors must provide comments on the staff member's overall performance over the past year.

Click **Next** to review and submit.

Complete Manager Evaluation

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025

- Current Goals
- Future Goals
- Core Responsibilities and Contributions
- Supervisor Accomplishments
- Professional Development
- Areas of Concern
- Supporting Documents
- Overall Performance**
- Review and Submit

Overall Performance

Describe the staff member's overall performance.

Manager

Comment * **Normal** | **B** | **I** | **U** | **A** | **☰** | **🔗** | **✉**

Andrew has consistently met expectations and contributed significantly to the success of the team. His commitment to accuracy, efficiency, and collaboration makes him an invaluable asset to the department, and I am confident they will continue to excel and grow in their role.

Back **Next** Save ...

12

Review & Submit: Supervisors should review the information they provided in the review form.

Send Back will send the self-evaluation form back to the staff member to edit comments. If supervisor comments were already entered, the staff member will not be able to see those comments when the form is sent back for edits. The comments will also not be lost when the staff member resubmits the self-evaluation form.

Save for Later until the review form is ready to be submitted.

Submit review to the staff member for review and final comments.

**Once this form is submitted to the staff member, comments cannot be edited. HR recommends supervisors save and create a PDF of the review to give to the staff member for the performance review conversation. Once the conversation takes place and changes are made (if needed), the supervisor can submit the form to the staff member for review and final comment.*

If changes are need after submittal, the supervisor must contact HR to correct the form.

The screenshot displays a web-based performance review form. On the left is a vertical navigation menu with five items: 'Supervisor Accomplishments', 'Professional Development', 'Areas of Concern', 'Supporting Documents', and 'Overall Performance'. The 'Review and Submit' option is highlighted with a blue bar and a blue circle icon. The main content area is divided into two sections: 'Supporting Documents' and 'Overall Performance'. The 'Overall Performance' section includes a 'Manager' label and a 'Comment' field containing the text: 'Andrew has consistently met expectations and contributed significantly to the success of the team. His commitu accuracy, efficiency, and collaboration makes him a valuable contributor to the department, and I am confident tl continue to excel and grow in their role.' At the bottom of the form, there are three buttons: 'Submit' (highlighted in blue), 'Send Back', and 'Save for Later'. Three orange arrows point down to each of these buttons.

Acknowledging & Finalizing the Annual Review Form

13

Once the staff member has reviewed and acknowledged the annual review form, a task will be sent to the supervisor's inbox for their review, acknowledgement, and final comments.



Good Afternoon, On Behalf of: Samantha Walsh

It's Thursday, March 13, 2025

Awaiting Your Action



Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

My Tasks - 15 second(s) ago

DUE 03/15/2025



Please confirm start date: Hire: Andrew Hamilton

My Tasks - 1 day(s) ago



Please confirm start date: Hire: Akila Amaratunga

My Tasks - 2 day(s) ago

[Go to My Tasks \(6\)](#)

Important Dates

You have no important dates co

[Go to Team Calendar](#)

Your Top Apps



Recruiting Dashboard



Benefits and Pay



Expenses Hub

14

Click **Get Started**.

On behalf of: Samantha Walsh

MENU



Search



Item 1 of 6



Created: 03/13/2025 | Due: 03/15/2025 | Effective: 06/30/2025

Provide Manager Review Comments

Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

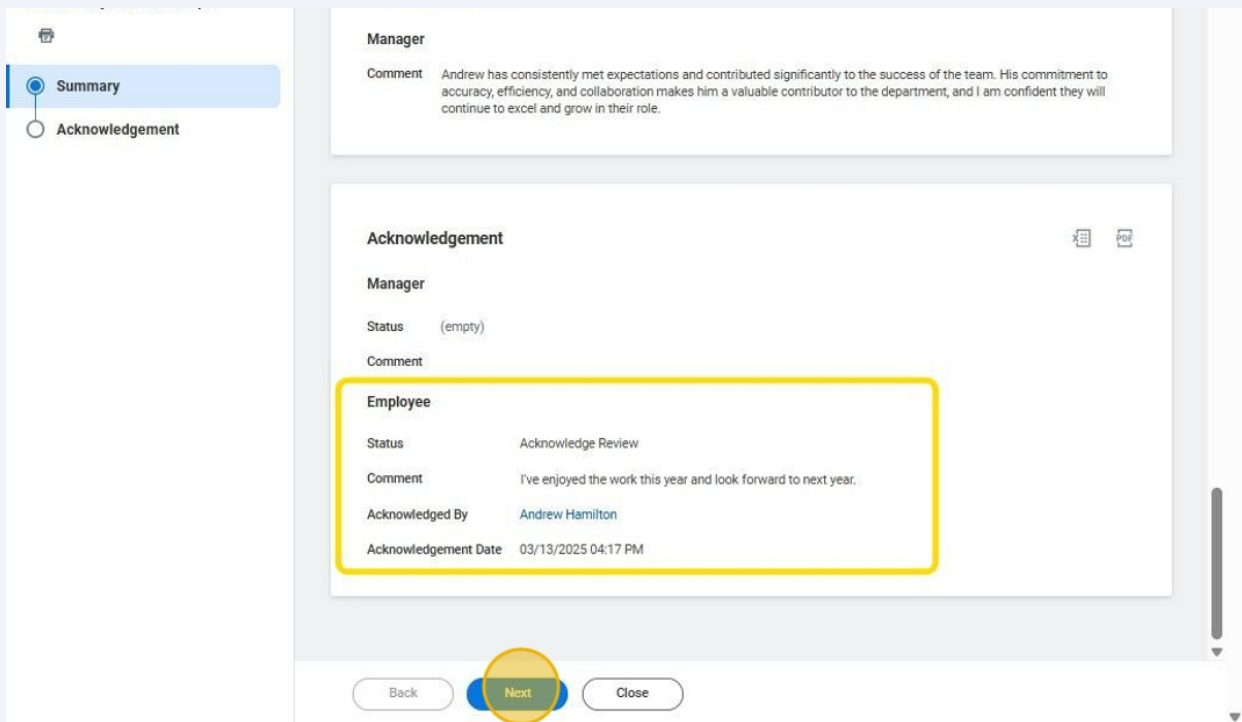
Evaluated By Lauren Stumpf

Review Period 07/01/2024 - 06/30/2025

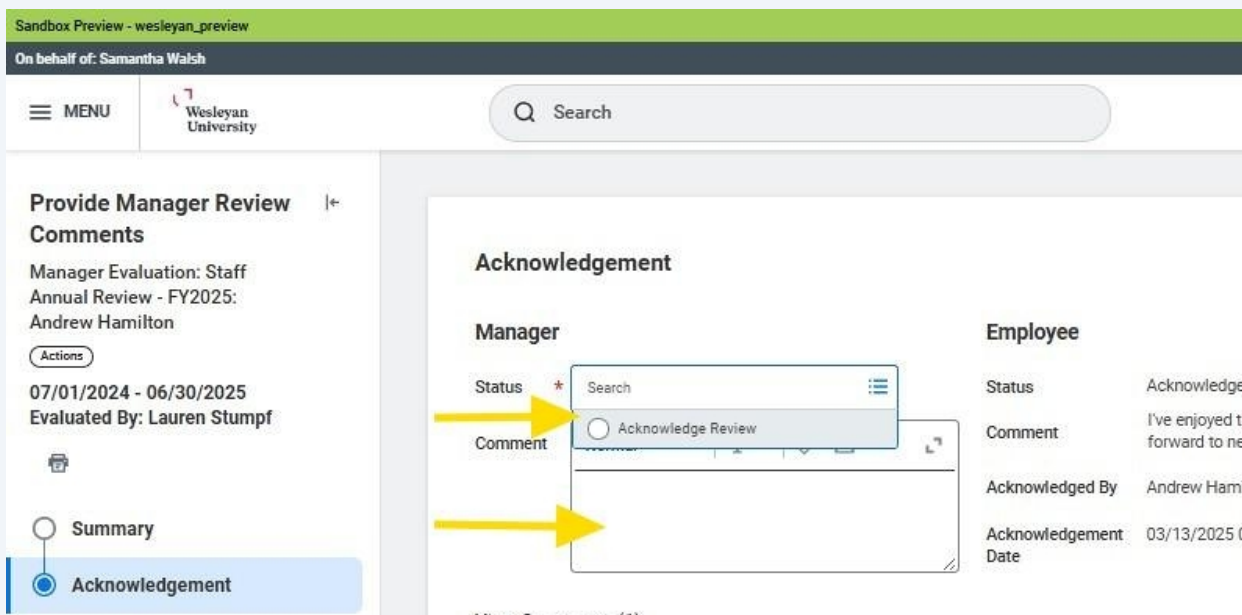


15 Review the annual review form and staff comments, if applicable.

Click **Next** to go to the next section.



16 Click status field to **Acknowledge Review** and add final comments to the comments field.



17 Click **Submit** to finalize the review.

The screenshot shows a performance review interface. On the left, a sidebar has 'Summary' and 'Acknowledgement' tabs, with 'Acknowledgement' selected. The main content area includes a text box with 'Thank you for a great year!', 'Acknowledged By: Andrew Hamilton', and 'Acknowledgement Date: 03/13/2025 04:17 PM'. Below this is a 'View Comments (1)' section with a comment from Lauren Stumpf. A 'Process History' section lists several actions, including 'Complete Manager Evaluation for Performance Review - Submitted' by Samantha Walsh. At the bottom, a 'Submit' button is highlighted with a yellow circle, next to a 'Save for Later' button.

Creating a PDF

18 Click **View** next to the review you wish to create a PDF for.

The screenshot shows a performance review dashboard. The top navigation bar includes 'MENU', 'Wesleyan University', and a search bar. The main content area has tabs for 'Goals', 'Performance Reviews', 'Development Items', and 'Reviews'. A table titled 'In Progress 1 item' displays the following data:


Review	Contains Hidden Sections	Review Period Start Date	Review Period End Date	Status	Awaiting	Due Date	View Review	Create Review PDF
Staff Annual Review - FY2025: Andrew Hamilton	Yes	07/01/2024	06/30/2025	Complete Manager Evaluation for Performance Review	Samantha Walsh	03/19/2025	View	Create New PDF

The 'View' button in the 'View Review' column is highlighted with a yellow circle.

19

Click on the PDF link once the document has generated.

The screenshot shows a web application interface with a search bar at the top and a navigation menu below it. The 'Performance Reviews' tab is selected. Below the navigation menu, there is a table with the following data:

Review	Contains Hidden Sections	Review Period Start Date	Review Period End Date	Status	Awaiting	Due Date	Review	View Review	Create
Staff Annual Review - FY2025: Andrew Hamilton	Yes	07/01/2024	06/30/2025	Complete Manager Evaluation for Performance Review	Samantha Walsh	03/19/2025	 Hamilton, Andrew Staff Annual Review - FY2025 03_13_2025.pdf	View	C

An orange arrow points to the PDF link in the 'Review' column of the first row.