

# Performance Management in Workday

Senior Business Administrators  
September 29, 2022



# Agenda

- Concepts
- Mid-year Review
- Year-end Review
- Appendix

# Concepts



# What is Workday Wave 2?

## Deployment of New Workday Functionality Talent and Learning

### Compliance and Accountability

Robust reporting and insight across all Workday modules

### Career Expectations

Career paths to help workers identify skills and training to move forward

### Professional Development

Well prepared talent to fill key roles and leadership positions

### Need for Efficiency

Robust use of Workday for human capital management

### Pace of Technology

Pace and evolution of technology to prepare the University for the future

### Wave 2 Functionality

#### Talent

**A skills-based lens to attract, develop, motivate, and retain Penn's workforce.**

Live as of  
July 2022

#### Learning

**Replacing Knowledge Link, a learning management system to house, deliver, and track Penn's training content.**

Go-live  
March 2023

### Wave 1 Functionality Live as of July 1, 2019

Core HCM  
Academic Unit  
Payroll  
Benefits  
Compensation

Time/Attendance  
Absence  
Recruiting  
Onboarding

### Workers

- Enhanced experience in a single system for related functions
- More clarity in career paths

### Managers

- Talent, career, development resources targeted to the University's needs
- Content for robust discussions with direct reports

### Workday Business Partners

- More people data available to assign accurate training and run actionable reporting

### Leadership

- Single data source promotes improved data analytics and actionable insights



Workday@Penn

# Fundamental Concept



# FY2023 Performance Review in Workday

<b>Review</b>	<b>Review Period</b>	<b>Workday Launch Date</b>	<b>Target Completion Date</b>
<b>Mid-Year Review</b>	May 1 – Oct. 31 (6 months)	Nov. 1, 2022	Dec. 15, 2022 (6 weeks)
<b>Year-End Review</b>	May 1 – Apr. 30 (12 months)	Apr. 17, 2023	May 15, 2023 (4 weeks)

# Summary of Required Steps

	Minimum Requirement		Detail
	Mid-Year Review	Year-End Review	
<b>Goals</b>	•	•	Comment on performance for each goal
<b>Accomplishments</b>			Add accomplishments for review period
<b>Feedback Questions</b>	•	•	Answer six questions
<b>Competencies</b>	•		Comment on at least three of the 10 competencies
<b>Competencies with Ratings</b>		•	Select an appropriate rating for each of the 10 competencies
<b>Supporting Documents</b>			Upload file(s)
<b>Overall Performance Rating</b>		•	Select an appropriate rating
<b>Acknowledgement</b>	•	•	Acknowledge



# Goal Categories

- Performance/Operational Goal
- Project/Initiative Goal
- Competency/Interpersonal Development Goal
- Professional Development Goal





# Competencies

- Everyone has the same five core Penn competencies.
- Each staff member also has five competencies, specific to the job family.

## **Core Penn Competencies**

1. Ensures Accountability
2. Collaborates
3. Communicates Effectively
4. Customer Focus
5. Values Differences

# More About Competencies

- Korn Ferry Data
  - Globally validated and correlated
  - Continuous updates
- Benefits
  - Qualitative
  - Quantitative
  - Uses specific examples of behavior that are given a number rating for the purpose of collecting data

# More About Competencies

- Behaviorally Anchored Rating Scales (BARS)
  - Type of performance management scale that use behavior “statements” as a reference point instead of generic descriptors commonly found on traditional rating scales.
- Rating Values
  - Needs Improvement
  - Meets Expectations
  - Exceeds Expectations

# Workday Check-Ins

- Optional but highly recommended
- Enable staff to hold and document one-on-one continuous conversations with direct reports, managers, peers, and mentors
- Intended to support performance reviews





# Performance Rating Values

- Exceeds expectations
- Fulfills expectations
- Meets some but not all expectations
- Does not meet expectations

# Example of a Mid-Year Review

# Section 1: Goals

**Complete Self Evaluation** |←

Self Evaluation: Mid-Year  
Review: Fall 2022: [blurred]

Actions

05/01/2022 - 10/31/2022

📄

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents
- Review and Submit

## Goals

Add or update goals for this 6 month review period, and evaluate the progress of each goal by providing a required comment. You may also add new goals that will begin in the upcoming evaluation period.

Existing goals that are not displaying in the Goals list below can easily be added to the review by clicking **Add** then using the **Add Existing** search box. For example, this would be applicable to goals created or updated before this Mid-Year review was launched.

*All goals must have a Due Date and Status entered to be able to submit the review to the next step.*

+ Add

Add Existing

Goal \*

Description

- Back
- Next
- Save for Later
- Close

# Section 1: Manager View of Goals

**Complete Manager Evaluation** |←

Manager Evaluation: Mid-Year Review: Fall 2022:

Actions

05/01/2022 - 10/31/2022

Goals

Accomplishments

Feedback Questions

Competencies

Supporting Documents

Review and Submit

**Goal** \*

Format | B | I | U | A | | | | | ↕

Goal Name ?

**Description**

Format | B | I | U | A | | | | | ↕

Longer goal description ?

**Due Date** 10/31/2022 ?

**Category** x Professional Development ... ?

**Status** In Progress ?

**Manager**

**Comment** \*

Normal | B | I | U | A | | | | | ↕

good progress

**Employee**

**Comment** Started this goal and need more work on it



# Section 2: Accomplishments

**Complete Self Evaluation** |←

[Self Evaluation: Mid-Year Review: Fall 2022:](#)

Actions

05/01/2022 - 10/31/2022

- Goals
- Accomplishments**
- Feedback Questions
- Competencies
- Supporting Documents
- Review and Submit

### Accomplishments

Click **Add** to add individual accomplishments.

You may choose to list work accomplishments not already assessed in the Goals section.

Accomplishment \* Normal B I U A ☰ 🔗

Finished project on time

Remove

Add

### Employee Summary

Comment Format B I U A ☰ 🔗

Back Next Save for Later Close

Mid-year Review Sample Screenshot, Accurate as of Sept. 2022

# Section 2: Manager View of Accomplishments

The screenshot displays a web application interface for a manager's mid-year review. On the left is a blue sidebar with a navigation menu containing 'Goals', 'Accomplishments' (highlighted), 'Feedback Questions', 'Competencies', 'Supporting Documents', and 'Review and Submit'. The main content area is titled 'Accomplishments' and includes instructions on how to add new items. A text editor is shown with the text 'Finished project on time'. Below it are 'Remove' and 'Add' buttons. At the bottom, there are two summary sections: 'Manager Summary' and 'Employee Summary', each with a text editor containing 'good job'. A bottom navigation bar contains 'Back', 'Next', 'Save for Later', and 'Close' buttons.

**Complete Manager Evaluation** |←  
Manager Evaluation: Mid-Year Review: Fall 2022:  
Actions  
05/01/2022 - 10/31/2022  
Goals  
Accomplishments  
Feedback Questions  
Competencies  
Supporting Documents  
Review and Submit

## Accomplishments

Click **Add** to add individual accomplishments.

You may choose to list work accomplishments not already assessed in the Goals section.

Accomplishment \* Format B I U A : ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ↵ ↶

Finished project on time

Remove

Add

### Manager Summary

Comment Normal B I U A : ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ↵ ↶

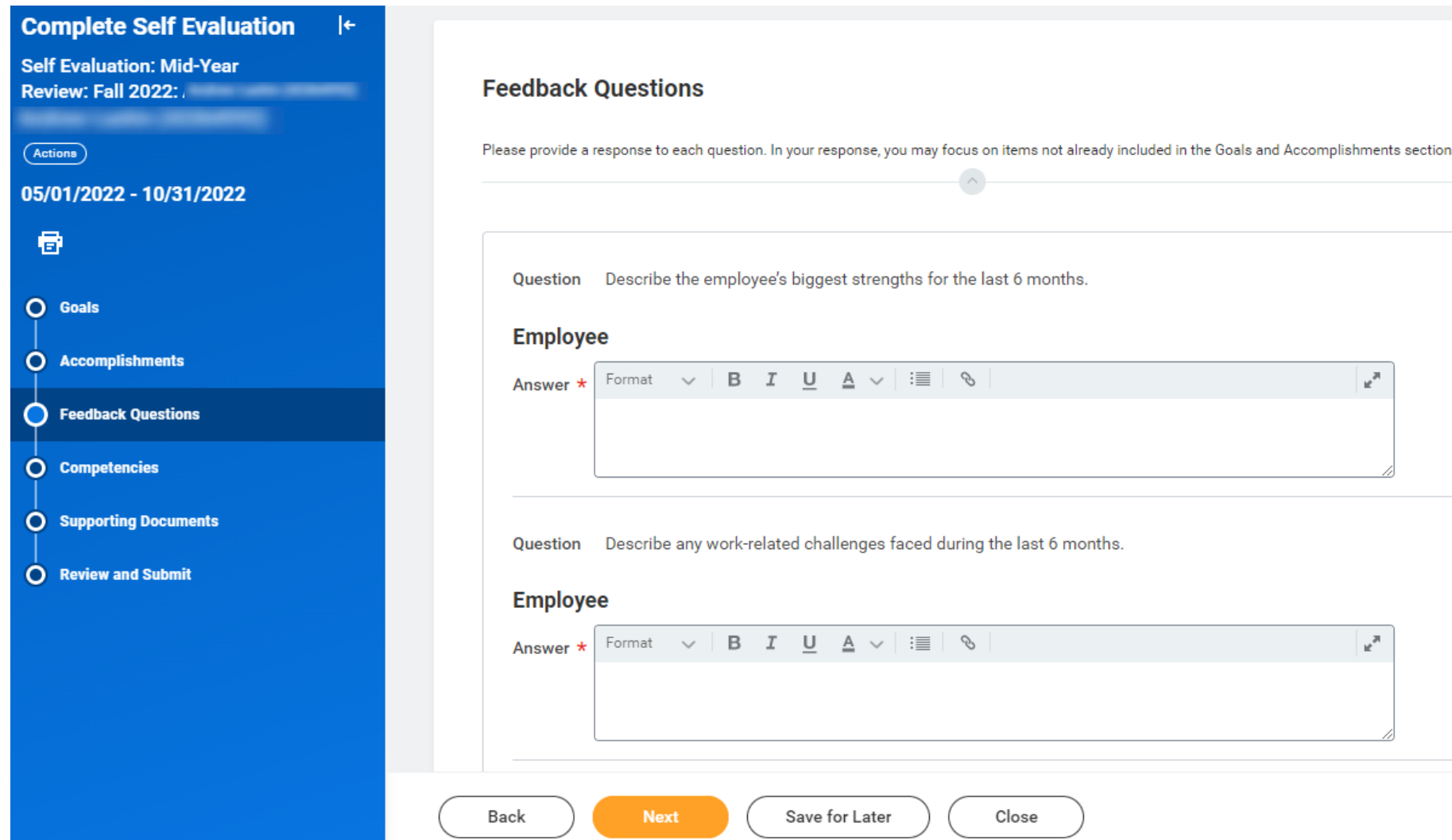
good job

### Employee Summary

Comment

Back Next Save for Later Close

# Section 3: Feedback Questions



**Complete Self Evaluation** |←

Self Evaluation: Mid-Year  
Review: Fall 2022: .

Actions

05/01/2022 - 10/31/2022

- Goals
- Accomplishments
- Feedback Questions**
- Competencies
- Supporting Documents
- Review and Submit

### Feedback Questions

Please provide a response to each question. In your response, you may focus on items not already included in the Goals and Accomplishments sections.

Question Describe the employee's biggest strengths for the last 6 months.

Employee

Answer \*

Question Describe any work-related challenges faced during the last 6 months.

Employee

Answer \*

Back Next Save for Later Close

## Questions

1. Describe the employee's biggest strengths for the last 6 months.
2. Describe any work-related challenges faced during the last 6 months.
3. Describe any areas for improvement for the next 6 months.
4. What additional support can the manager provide to enhance success in this role?
5. What professional development opportunities should be explored/identified, and when should these be completed?
6. Are there any additional comments or questions you would like to add?

# Section 3: Manager View of Feedback Questions

**Complete Manager Evaluation** |←

Manager Evaluation: Mid-Year Review: Fall 2022:

Actions

05/01/2022 - 10/31/2022

- Goals
- Accomplishments
- Feedback Questions**
- Competencies
- Supporting Documents
- Review and Submit

## Feedback Questions

Please provide a response to each question. In your response, you may focus on items not already included in the Goals and Accomplishments sections.

Question Describe the employee's biggest strengths for the last 6 months.

Manager

Answer \*

Employee

Answer great teammate

Question Describe any work-related challenges faced during the last 6 months.

Manager

Answer \*

Employee

Answer poor communication

Question Describe any areas for improvement for the next 6 months.

Manager

Answer \*

Employee

Answer test

[Back](#) [Next](#) [Save for Later](#) [Close](#)

# Section 4: Competencies

**Complete Self Evaluation** |←

Self Evaluation: Mid-Year Review: Fall 2022:

Actions

05/01/2022 - 10/31/2022

Goals

Accomplishments

Feedback Questions

**Competencies**

Supporting Documents

Review and Submit

## Competencies

Please review the competencies associated with this position below.

Provide comments on successes and/or opportunities for improvement for a minimum of three competencies.

Competencies will be rated during the Year-End review.

10 items

Competency	Description	Employee Evaluation
Collaborates	Building partnerships and working collaboratively with others to meet shared objectives. <ul style="list-style-type: none"><li>• Shares information with others so there are no surprises.</li><li>• Involves others as appropriate to accomplish individual and group goals.</li><li>• Encourages unity rather than "us vs. them" thinking.</li><li>• Welcomes and acknowledges the ideas and input of others.</li></ul>	Comment <input type="text"/>
Communicates effectively	Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences. <ul style="list-style-type: none"><li>• Clear, concise, and professional in communication.</li><li>• Listens with interest to what others have to say.</li><li>• Shares information and updates with others as needed.</li><li>• Is clear and thorough in reports, documentation, and other written information.</li></ul>	Comment <input type="text"/>
Customer focus	Building strong customer relationships and delivering customer-centric solutions.	Comment <input type="text"/>

Back

Next

Save for Later

Close

# Section 3: Manager View of Competencies

**Complete Manager Evaluation** |←

Manager Evaluation: Mid-Year Review: Fall 2022: .

Actions

05/01/2022 - 10/31/2022

📄

- Goals
- Accomplishments
- Feedback Questions
- Competencies**
- Supporting Documents
- Review and Submit

## Competencies

Please review the competencies associated with this position below.

Provide comments on successes and/or opportunities for improvement for a minimum of three competencies.

Competencies will be rated during the Year-End review.

10 items

Competency	Description	Manager Evaluation	Employee Evaluation
Collaborates	<p>Building partnerships and working collaboratively with others to meet shared objectives.</p> <ul style="list-style-type: none"><li>• Shares information with others so there are no surprises.</li><li>• Involves others as appropriate to accomplish individual and group goals.</li><li>• Encourages unity rather than "us vs. them" thinking.</li><li>• Welcomes and acknowledges the ideas and input of others.</li></ul>	<p>Comment</p> <input type="text" value="strong performer"/>	<p>Comment</p> <p>collaborates well</p>
Communicates effectively	<p>Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.</p> <ul style="list-style-type: none"><li>• Clear, concise, and professional in communication.</li><li>• Listens with interest to what others have to say.</li></ul>	<p>Comment</p> <input type="text" value="agree, good skills"/>	<p>Comment</p> <p>good communicator</p>

Back Next Save for Later Close

# Section 5: Supporting Documents

**Complete Self Evaluation** |←

Self Evaluation: Mid-Year  
Review: Fall 2022:

Actions

05/01/2022 - 10/31/2022

📄

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents**
- Review and Submit

## Supporting Documents

Optional: Upload relevant supporting documents.

Employee

Drop files here

or

Select files

Back Next Save for Later Close

Mid-year Review Sample Screenshot, Accurate as of Sept. 2022

# Employee Acknowledgement

**Provide Employee Review Comments** |←

Manager Evaluation: Mid-Year Review: Fall 2022: [Redacted]

Actions

05/01/2022 - 10/31/2022

Evaluated By: [Redacted]

Print

Summary

**Acknowledgement**

## Acknowledgement

### Employee

Status \*

Comment

**Employee Review Acknowledgement Status**

[Employee Acknowledgement](#)

Description Employee Acknowledges to have discussed the review content with the manager during a formal discussion.

### Process History

- Complete Manager Evaluation for Performance Review - Submitted Just now
- Provide Employee Review Comments - Awaiting Action

[Submit](#) [Save for Later](#)



# Manager Acknowledgement

**Provide Manager Review** |←

**Comments**

Manager Evaluation: Mid-Year Review: Fall 2022: .

Actions

05/01/2022 - 10/31/2022

Evaluated By:

Summary

**Acknowledgement**

### Acknowledgement

Manager	Employee
Status *	<input type="text" value="Manager Acknowledgement"/>
Comment	<div><p><b>Employee Review Acknowledgement Status</b></p><p>Manager Acknowledgement</p><p>Description: Manager Acknowledges to have discussed the review content with the employee during a formal discussion.</p></div>

#### Process History

- Complete Manager Evaluation for Performance Review- Submitted (1 minute ago)
- Provide Employee Review Comments- Submitted (Just now)
- Provide Manager Review Comments- Awaiting Action

**Submit** Save for Later

# Example of a Year-end Review



# Section 1: Goals

**Complete Self Evaluation** |←

Self Evaluation: Year-End  
Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

📄

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

## Goals

Add or update goals for this 12 month review period, and evaluate the progress of each goal by providing a required comment. You may also add new goals that will begin in the upcoming evaluation period.

Existing goals that are not displaying in the Goals list below can easily be added to the review by clicking **Add** then using the **Add Existing** search box. For example, this would be applicable to goals created or updated before this Year-End review was launched.

*All goals must have a Due Date and Status entered to be able to submit the review to the next step.*

+ Add

Goal \*

Format | B | I | U | A | | | | ↗

Goal Name

Description

Format | B | I | U | A | | | | ↗

Longer goal description

Due Date: 10/31/2022 📅

Back Next Save for Later Close

# Section 1: Manager View of Goals

**Complete Manager Evaluation** |←

Manager Evaluation: Year-End Review: Spring 2023: [blurred]

Actions

05/01/2022 - 04/30/2023

🖨️

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

**Goal** \*

Format | B | I | U | A | [list] | [link]

Goal Name

**Description**

Format | B | I | U | A | [list] | [link]

Longer goal description

**Due Date** 10/31/2022 📅

**Category** X Professional Development ... [list]

**Status** In Progress ▾

**Manager**

**Comment** \*

Format | B | I | U | A | [list] | [link]

good progress

**Employee**

**Comment** Started this goal and need more work on it

> **History**

◀

Back Next Save for Later Close

Year-end Review Sample Screenshot, Accurate as of Sept. 2022

# Section 2: Accomplishments

**Complete Self Evaluation** |←

Self Evaluation: Year-End Review: Spring 2023: Andrew Lashin (42364992)

05/01/2022 - 04/30/2023

- Goals
- Accomplishments**
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

## Accomplishments

Click **Add** to add individual accomplishments. Accomplishments added during the previous Mid-Year review will auto-populate.

You may choose to list work accomplishments not already assessed in the Goals section.

Accomplishment \*

Format | B | I | U | A | | | |

Finished project on time

Remove

Add

## Employee Summary

Comment

Format | B | I | U | A | | | |

Back | **Next** | Save for Later | Close

Year-end Review Sample Screenshot, Accurate as of Sept 2022

# Section 2: Manager View of Accomplishments

**Complete Manager Evaluation** |←

Manager Evaluation: Year-End Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

- Goals
- Accomplishments**
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

## Accomplishments

Click **Add** to add individual accomplishments. Accomplishments added during the previous Mid-Year review will auto-populate.

You may choose to list work accomplishments not already assessed in the Goals section.

Accomplishment \*

Format | B | I | U | A | | | | ↗

Finished project on time

Remove

Add

### Manager Summary

Comment

Normal | B | I | U | A | | | | ↗

great project outcome

### Employee Summary

Comment

Back Next Save for Later Close

Year-end Review Sample Screenshot, Accurate as of Sept. 2022

# Section 3: Feedback Questions

**Complete Self Evaluation** |←  
Self Evaluation: Year-End  
Review: Spring 2023

Actions

05/01/2022 - 04/30/2023

- Goals
- Accomplishments
- Feedback Questions**
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

### Feedback Questions

Please provide a response to each question. In your response, you may focus on items not already included in the Goals and Accomplishments s

Question Describe the employee's biggest strengths for the last 12 months.

**Employee**

Answer \*

Question Describe any work-related challenges faced during the last 12 months.

**Employee**

Answer \*

Back Next Save for Later Close

- ### Questions
1. Describe the employee's biggest strengths for the last 12 months.
  2. Describe any work-related challenges faced during the last 12 months.
  3. Describe any areas for improvement for the next 12 months.
  4. What additional support can the manager provide to enhance success in this role?
  5. What professional development opportunities should be explored/identified, and when should these be completed?
  6. Are there any additional comments or questions you would like to add?

# Section 3: Manager View of Feedback Questions

**Complete Manager Evaluation** |←

Manager Evaluation: Year-End Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

📄

- Goals
- Accomplishments
- Feedback Questions**
- Competencies
- Supporting Documents
- Overall Rating
- Review and Submit

## Feedback Questions

Please provide a response to each question. In your response, you may focus on items not already included in the Goals and Accomplishments sections.

Question Describe the employee's biggest strengths for the last 12 months.

**Manager**

Answer \*

Format | B | I | U | A | | | | ↵ ↗

**Employee**

Answer fast worker

Question Describe any work-related challenges faced during the last 12 months.

**Manager**

Answer \*

Format | B | I | U | A | | | | ↵ ↗

**Employee**

Answer always late

Question Describe any areas for improvement for the next 12 months.

**Manager**

**Employee**

Back Next Save for Later Close



# Section 4: Competencies



**Complete Self Evaluation** |←

Self Evaluation: Year-End  
Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

📄

- Goals
- Accomplishments
- Feedback Questions
- Competencies**
- Supporting Documents
- Overall Rating
- Review and Submit

## Competencies

Please review the competencies associated with this position below.

Enter a proficiency rating for each competency, and add an optional comment.

Select a competency rating to see behavioral examples for that rating.

⬆

10 items

Competency	Description	Employee Evaluation
Collaborates	<p>Building partnerships and working collaboratively with others to meet shared objectives.</p> <ul style="list-style-type: none"><li>Shares information with others so there are no surprises.</li><li>Involves others as appropriate to accomplish individual and group goals.</li><li>Encourages unity rather than "us vs. them" thinking.</li><li>Welcomes and acknowledges the ideas and input of others.</li></ul>	<p>Proficiency Rating ★</p> <p>Search</p> <p>× Needs Improvement ...</p> <p>Allows surprises to arise by withholding information that others would have liked to know. Works in isolation, even when the best outcomes can be attained by partnering with others. Engages in "us vs. them" thinking or allows it to exist within the team. Focuses largely on own views; misses opportunities to acknowledge others' ideas and input.</p> <p>Comment</p> <p></p>
Communicates effectively	<p>Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.</p> <ul style="list-style-type: none"><li>Clear, concise, and professional in communication.</li><li>Listens with interest to what others have to say.</li></ul>	<p>Proficiency Rating ★</p> <p>× Exceeds Expectations ...</p> <p>Delivers even highly complex information in a polished, precise, and compelling manner. Exhibits verbal and non-verbal behaviors that indicate a deep interest in others' comments.</p>

Back Next Save for Later Close

# Section 4: Manager View of Competencies

**Complete Manager Evaluation** |←

Manager Evaluation: Year-End Review: Spring 2023: [blurred]

Actions

05/01/2022 - 04/30/2023

Goals

Accomplishments

Feedback Questions

**Competencies**

Supporting Documents

Overall Rating

Review and Submit

## Competencies

Please review the competencies associated with this position below.

Enter a proficiency rating for each competency, and add an optional comment.

Select a competency rating to see behavioral examples for that rating.

10 items

Competency	Description	Manager Evaluation	Employee Evaluation
Collaborates	<p>Building partnerships and working collaboratively with others to meet shared objectives.</p> <ul style="list-style-type: none"><li>Shares information with others so there are no surprises.</li><li>Involves others as appropriate to accomplish individual and group goals.</li><li>Encourages unity rather than "us vs. them" thinking.</li><li>Welcomes and acknowledges the ideas and input of others.</li></ul>	<p>Proficiency Rating *</p> <input type="text"/> <p>Comment</p> <input type="text"/>	<p>Proficiency Rating</p> <p>Needs Improvement</p> <p>Allows surprises to arise by withholding information that others would have liked to know. Works in isolation, even when the best outcomes can be attained by partnering with others. Engages in "us vs. them" thinking or allows it to exist within the team. Focuses largely on own views; misses opportunities to acknowledge others' ideas and input.</p> <p>Comment</p> <input type="text"/>
Communicates effectively	<p>Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.</p>	<p>Proficiency Rating *</p> <input type="text"/> <p>Comment</p> <input type="text"/>	<p>Proficiency Rating</p> <p>Exceeds Expectations</p> <p>Delivers even highly complex information in a polished, precise, and compelling</p>

Back Next Save for Later Close

# Section 5: Supporting Documents

**Complete Self Evaluation** |←

Self Evaluation: Year-End  
Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

📁

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents**
- Overall Rating
- Review and Submit

## Supporting Documents

Optional: Upload relevant supporting documents.

Employee

Drop files here

or

Select files

- Back
- Next
- Save for Later
- Close

# Section 6: Overall Rating

**Complete Self Evaluation** |←

Self Evaluation: Year-End  
Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating**
- Review and Submit

### Overall Rating

Please select an appropriate performance rating for the past 12 months.

Employee

Rating \*

Rating Description

Comment

- select one
- Exceeds expectations
- Fulfills expectations
- Meets some but not all expectations
- Does not meet expectations

Back Next Save for Later Close

# Section 7: Manager View of Overall Rating

**Complete Manager Evaluation** |←

Manager Evaluation: Year-End Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023

- Goals
- Accomplishments
- Feedback Questions
- Competencies
- Supporting Documents
- Overall Rating**
- Review and Submit

### Overall Rating

Please select an appropriate performance rating for the past 12 months.

↑

Manager	Employee
Rating * Meets some but not all expectations ▼	Rating Fulfills expectations
Rating Description Acceptable performance overall, though did not meet some goals or sometimes fell short of standards for timeliness, quality, and/or resource utilization. Manager should describe action steps for improvement.	Rating Description Successfully met all goals, consistently meeting standards for timeliness, quality, and/or resource utilization.
Comment <div style="border: 1px solid #ccc; padding: 5px;"><p>Format ▼ <b>B</b> <i>I</i> <u>U</u> <span style="color: red;">A</span> ▼   ☰   🔗   ↗</p><hr/></div>	Comment good year

# Employee Acknowledgement

**Provide Employee Review** |←  
**Comments**

Manager Evaluation: Year-End  
Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023  
Evaluated By:

Summary

**Acknowledgement**

## Acknowledgement

### Employee

Status \*

Employee Acknowledgement

Comment

Format | B I U A

### Employee Review Acknowledgement Status

Employee Acknowledgement

Description Employee Acknowledges to have discussed the review content with the manager during a formal discussion.

### Process History

- Complete Manager Evaluation for Performance Review - Submitted Just now
- Provide Employee Review Comments - Awaiting Action

Submit

Save for Later

# Manager Acknowledgement

**Provide Manager Review Comments** |←

Manager Evaluation: Year-End Review: Spring 2023:

Actions

05/01/2022 - 04/30/2023  
Evaluated By:

Summary

**Acknowledgement**

### Acknowledgement

Manager Employee

Status \* × Manager Acknowledgement ...

Comment Format | B I U A

#### Employee Review Acknowledgement Status

[Manager Acknowledgement](#)

---

**Description** Manager Acknowledges to have discussed the review content with the employee during a formal discussion.

#### Process History

- Complete Manager Evaluation for Performance Review – Submitted 1 minute ago
- Provide Employee Review Comments – Submitted Just now
- Provide Manager Review Comments – Awaiting Action

**Submit** Save for Later

# Appendix





# Summary of Required Steps

	Minimum Requirement		Detail
	Mid-Year Review	Year-End Review	
<b>Goals</b>	•	•	Comment on performance for each goal
<b>Accomplishments</b>			Add accomplishments for review period
<b>Feedback Questions</b>	•	•	Answer six questions
<b>Competencies</b>	•		Comment on at least three of the 10 competencies
<b>Competencies with Ratings</b>		•	Select an appropriate rating for each of the 10 competencies
<b>Supporting Documents</b>			Upload file(s)
<b>Overall Performance Rating</b>		•	Select an appropriate rating
<b>Acknowledgement</b>	•	•	Acknowledge

# Overview of Manager Resources\*

Human Resources on <a href="http://www.hr.upenn.edu">www.hr.upenn.edu</a>		Workday on <a href="http://www.workday.upenn.edu">www.workday.upenn.edu</a>	
Policies	<ul style="list-style-type: none"> <li>• <a href="#">Introductory Period</a></li> <li>• <a href="#">Internal Hire</a></li> <li>• <a href="#">Performance and Staff Development Program</a></li> </ul>	Process Guides	<a href="#">Manager's Responsibilities in Workday</a> <a href="#">Performance Management Guide</a>
Managers Toolkit	<ul style="list-style-type: none"> <li>• <a href="#">Performance Management</a></li> <li>• <a href="#">Introductory Review Period for New Hires</a></li> <li>• <a href="#">90-Day Evaluation for Internal Transfers</a></li> <li>• <a href="#">Annual Performance Appraisal Program</a></li> <li>• <a href="#">Competencies</a></li> <li>• <a href="#">Effective Performance Management</a></li> </ul>	Tip Sheets	<ul style="list-style-type: none"> <li>• <a href="#">Goals and Performance Management</a></li> <li>• <a href="#">Performance Introductory Review for HR Partners</a></li> <li>• <a href="#">Performance Introductory Review for Managers and Employees</a></li> </ul>
Legacy Performance Reviews	Access to the past performance review system as read-only will be available to authorized users.	Seven years of historical data (FY16 to FY22) will be migrated to Workday records. Data include manager's performance rating, manager's summary comment, and employee's summary comment. The comment fields may be blank in some cases as they were not required.	

# Upcoming Training for Performance and Talent

		Virtual Training Presented By		
		Staff & Labor	Talent Management	Workday Operations
Audience	HR Partners/ HRA		<ul style="list-style-type: none"> <li>Talent Management Overview for HR Business Partners – Completed</li> <li>Competencies Overview for HR Business Partners – In Development</li> </ul>	
	Managers	<ul style="list-style-type: none"> <li><a href="#">Virtual Online Training: Conducting Performance Appraisals for Supervisors</a>, (updated with Workday processes) 9/29 12:30 – 1:30</li> <li>Establishing Introductory Reviews for New and Internal Hires (new) – Coming Fall 2022</li> </ul>	<ul style="list-style-type: none"> <li>Talent Management Overview for Managers – Coming Fall 2022</li> <li>Competencies Overview for Managers – In Development</li> <li><a href="#">Virtual Online Training: The Gift of Feedback</a> (updated with Workday processes) 10/25 12:30 – 1:30</li> </ul>	<p><a href="#">Workday Webinar Wednesday</a> 10/12 12:00 – 1:00 pm</p> <p>How to Step Through the Performance Review Process in Workday, for Managers – Coming Fall 2022</p>
	Staff	<ul style="list-style-type: none"> <li><a href="#">Virtual Online Training: Participating in Performance Appraisals for Staff</a>, (updated with Workday processes) 9/20 12:30 – 1:30</li> </ul>	<ul style="list-style-type: none"> <li>Talent Management Overview for Staff – Coming Fall 2022</li> <li>Competencies Overview for Staff – In Development</li> <li><a href="#">Virtual Online Training: Your Career at Penn</a> (updated with Workday processes) 11/7 12:30 – 1:30</li> </ul>	<p>How to Step Through the Performance Review Process in Workday, for Staff – Coming Fall 2022</p>