

Annual Evaluation – Job Aid for Supervisors

Updated July 2026

A documented Annual Evaluation is required at the completion of a performance year. The steps below outline **supervisor actions/responsibilities** within the process.

Step 01. Set the Evaluation Content in Workday

1. **Log in** to Workday.
2. **Locate** your set content task, titled “Set Content: Annual Evaluation Staff – 2026: Employee Name” and **click** it.



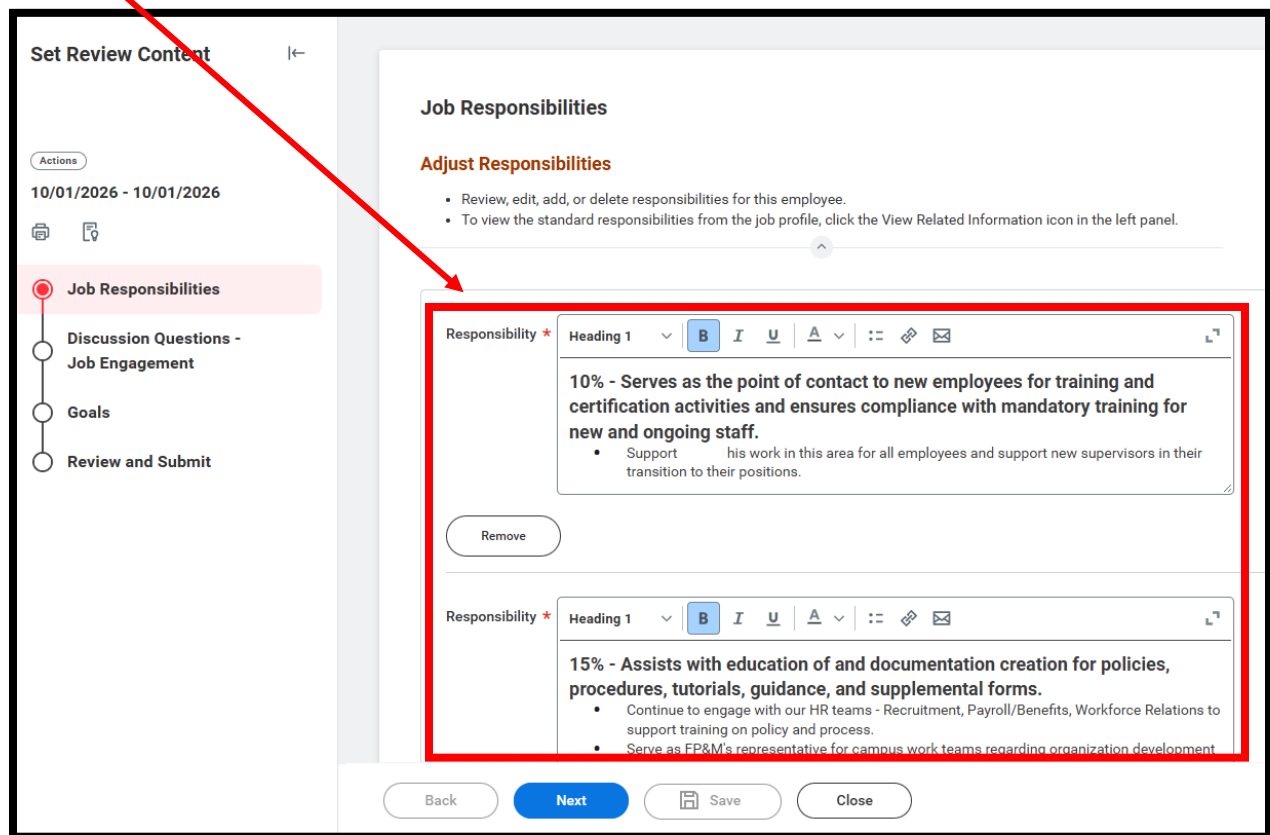
- a. You may also open your task inbox to locate and click to open it from there.

3. When your task launches, **click** “Get Started.”



4. **Review** the job responsibilities, expectations, and goals for your employee.

If you do need to make updates, be sure to schedule a discussion with your employee to review the updates so you're both on the same page.



Set Review Content

Actions

10/01/2026 - 10/01/2026

Job Responsibilities

Discussion Questions - Job Engagement

Goals

Review and Submit

Job Responsibilities

Adjust Responsibilities

- Review, edit, add, or delete responsibilities for this employee.
- To view the standard responsibilities from the job profile, click the View Related Information icon in the left panel.

Responsibility *

Heading 1

10% - Serves as the point of contact to new employees for training and certification activities and ensures compliance with mandatory training for new and ongoing staff.

- Support his work in this area for all employees and support new supervisors in their transition to their positions.

Remove

Responsibility *

Heading 1

15% - Assists with education of and documentation creation for policies, procedures, tutorials, guidance, and supplemental forms.

- Continue to engage with our HR teams - Recruitment, Payroll/Benefits, Workforce Relations to support training on policy and process.
- Serve as FP&M's representative for campus work teams regarding organization development

Back Next Save Close

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5. If you have not done so, **add** FP&M Criteria for Success as a job responsibility by **clicking** "Add" and **copying** the language provided below.

Note: The link (designated by blue text) can also be copied directly into Workday.

Responsibility

Normal

FP&M Criteria for Success

EXPECTATION

- Continuously develop and strengthen skills in [FP&M's Criteria for Success](#) to support your development.

OPTIONAL: Call out specific criteria to focus on.

Remove

Add

Back Next Save Close

6. When your review and/or updates are complete, **select** submit.

Review and Submit

Submit

Send Back

Save for Later

02. Employee Self Evaluation

1. After you submit the evaluation content, your employee will complete their self evaluation.
2. Once their self evaluation is submitted, you will receive the task outlined in step 03 of the process.

03. Complete Manager Evaluation – Job Responsibilities

1. **Locate** your manager evaluation task, titled "Manager Evaluation: Annual Evaluation Staff – 2026: Employee Name" and **click** it.

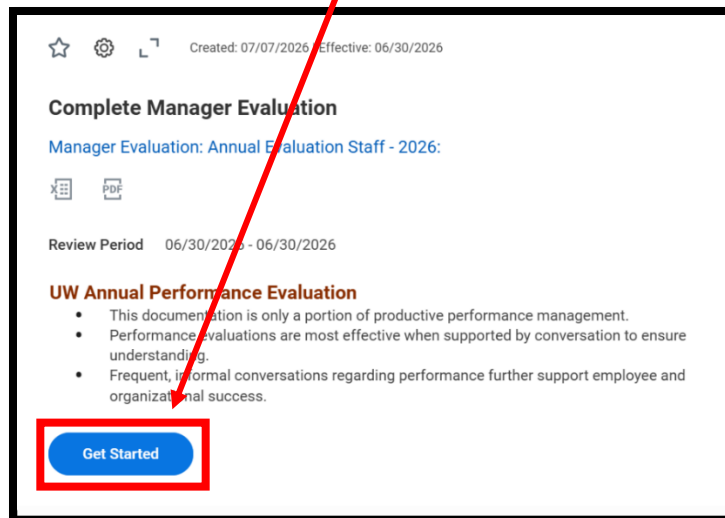
Awaiting Your Action

Manager Evaluation: Annual Evaluation Staff - 2026:
My Tasks - 7 hour(s) ago

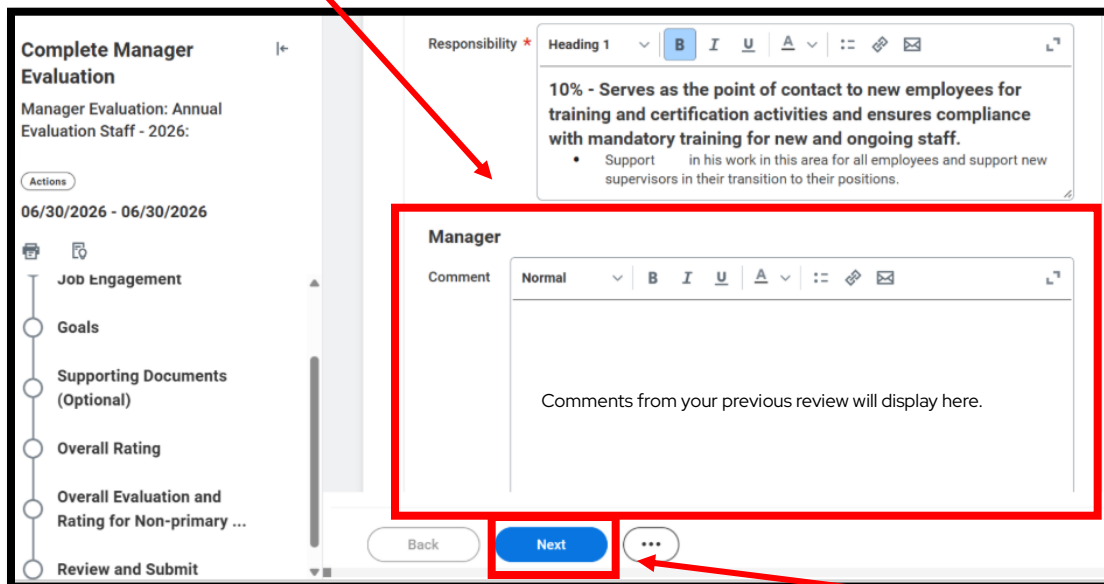
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2. When you task launches, **click** "Get Started."



3. **Add/edit** comments for reach job responsibility. (optional)
IMPORTANT NOTE: Comments added during the previous review period (midpoint evaluations) will automatically be displayed. You may delete, add to, or maintain those comments.



IMPORTANT NOTE: There are no ratings for individual job responsibilities, which makes comments critically important for capturing performance.

4. **Select** "Next."

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04. Complete Manager Evaluation – Discussion Questions

1. **Review** the answers your employee added for each question. **Answer** each discussion question by typing your response in the box. You can both respond to your employee's answers and add additional information.

The questions are:

- *What have you observed?*
- *What resources, guidance, and support can you offer?*
- *What knowledge, skills, activities, or projects would you suggest that would advance performance in this role?*

Complete Manager Evaluation

Manager Evaluation: Annual Evaluation Staff - 2026:

06/30/2026 - 06/30/2026

Job Responsibilities

Discussion Questions - Job Engagement

Goals

Supporting Documents (Optional)

Overall Rating

Discussion Questions - Job Engagement

Discussion Questions

- These questions should be answered to help guide conversation.
- There is a distinct question for you and the employee.

Question Employee: Which of your accomplishments in this review period make you most proud?

Manager: What have you observed?

Manager

Answer Normal B I U A v : = < >

Back Next ...

2. **Select "Next."**

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05. Complete Manager Evaluation – Goals

1. **Review** each goal description listed. These should be the same as future or in progress goals from the last review and you may add new goals for the future.

Complete Manager Evaluation

Manager Evaluation: Annual Evaluation Staff - 2026:

06/30/2026 - 06/30/2026

Goals

Supporting Documents (Optional)

Overall Rating

Overall Evaluation and Rating for Non-primary ...

Review and Submit

Goals

Review Goals

- Review status of each goal.
- If comments were entered for a goal in a previous evaluation, the comments have carried over to this evaluation.
- Add/update comments for each goal as needed.

Goal * Heading 1 B I U A ::

Professional Development

Back Next ...

2. **Select** a status for each goal using the status dropdown. **Update** due dates as needed using the calendar button.

Use the following statuses:

- Not Started
- In Progress
- Completed

3. **Add** comments to support your status and progress. (optional)

4. **Select** "Next."

Due Date MM / DD / YYYY

Status * In Progress

Manager

Comment Normal B I U A ::

Employee

Comment

> History

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06. Complete Manager Evaluation – Upload Supporting Documents

1. **Add** supporting documents by either dragging and dropping files into the gray square or by clicking “select files” to choose files to import. (optional)

Note: Added documents should highlight accomplishments, growth, and/or performance. There is not a known limitation on how many documents can be added.

The screenshot shows a web application interface for 'Complete Manager Evaluation'. The left sidebar contains a navigation menu with items: Home, Strategy, HR operations, More, Saved, and a settings icon. The main content area is titled 'Complete Manager Evaluation' and 'Manager Evaluation: Annual Evaluation Staff - 2026'. Below this, there's a section for 'Supporting Documents (Optional)' which is highlighted with a red box. This section includes a header 'Supporting Documents (Optional)', a sub-header 'Upload Supporting Documents (optional)', and a large gray box labeled 'Drop files here' with a 'Select files' button. At the bottom of the main content area, there are three buttons: 'Back', 'Next' (highlighted with a red box), and a three-dot menu button. A red arrow points from the 'Next' button in the instructions to the 'Next' button in the interface.

2. **Select** “Next.”

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07. Complete Manager Evaluation – Overall Rating

1. **Select** an overall rating that summarizes your employee's performance for the year.

Use the following definitions to help decide appropriate ratings:

- *Exceeding expectations – Performance consistently exceeds the communicated expectations.*
- *Meeting expectations – Performance consistently meets the communicated expectations.*
- *Partially meeting expectations – Performance does not consistently meet communicated expectations.*
- *Failing to meet expectations – Performance is consistently below expectations and/or reasonable progress has not been made.*

The screenshot shows the 'Complete Manager Evaluation' web application. The sidebar on the left has a red dot next to 'Overall Rating'. The main content area is titled 'Overall Rating' and includes instructions: 'The Overall Rating should be reflective of performance in areas of responsibility and progress on goals.' Below this, there are bullet points: 'Employee comments should be considered when selecting an overall rating.', 'Human Resources will be notified of an overall rating of Failing to Meet Expectations.', and 'Performance improvement strategies should be discussed with your Human Resources team.' The 'Manager' section has a 'Rating' dropdown menu set to 'select one'. Below the rating is a 'Rating Description' field (empty) and a 'Comment' field with a rich text editor. At the bottom, there are three buttons: 'Back', 'Next', and a three-dot menu. Red arrows point from the text instructions to the 'Rating' dropdown, the 'Comment' field, and the 'Next' button.

2. **Add** comments to support the overall rating. (optional)
IMPORTANT NOTE: Ensure you're communicating with Workforce Relations prior to selecting ratings below meeting expectations.
3. **Select** "Next."

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08. Complete Manager Evaluation – Evaluation and Rating for Non-Primary Job

1. **Select “Next.”**

The screenshot shows the 'Complete Manager Evaluation' interface. The left sidebar contains a navigation menu with items: Home, Strategy, HR Operations, and More. The main content area is titled 'Overall Evaluation and Rating for Non-primary Job'. It includes a section for 'Overall Rating for Non-primary Job(s)' with feedback instructions and a list of circumstances where the section remains blank. At the bottom, there are three buttons: 'Back', 'Next', and a three-dot menu. The 'Next' button is highlighted with a red box, and a red arrow points to it from the instruction above.

09. Complete Manager Evaluation – Review and Submit

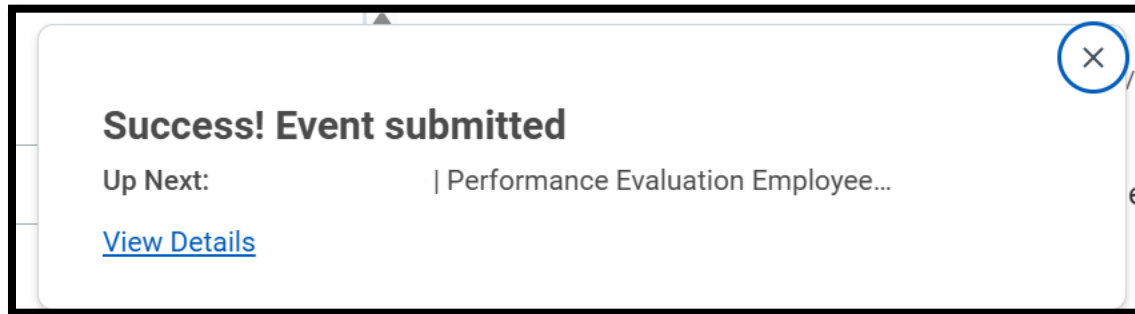
1. **Review** all of the content you’ve added. When complete, **click “Submit.”**
***IMPORTANT NOTE:** Once you submit your evaluation, it will be sent to your employee. Ensure you’re scheduling a conversation to review the content either before or shortly after you submit this step.*

The screenshot shows the 'Complete Manager Evaluation' interface at the 'Job Responsibilities' step. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Job Responsibilities' and contains a table with columns for 'Responsibility' and 'Manager'. The 'Responsibility' column contains text about training and certification activities. The 'Manager' column has a 'Comment' field. At the bottom, there are three buttons: 'Submit', 'Send Back', and 'Save for Later'. The 'Submit' button is highlighted with a red box, and a red arrow points to it from the instruction above.

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2. Upon submission, you'll receive a pop-up indicating success and the next step in the process. No action is required.



10. Performance Evaluation Employee Acknowledgement & Notification

1. Your employee will receive a task to acknowledge their performance evaluation.
Note: Their acknowledgement is not an indication of agreement.
2. Upon employee acknowledgement, you'll receive a notification indicating the evaluation has been complete. To access the acknowledgement, **click** the bell icon at the top of the page.

