Step 1:
Review and Select Competencies with Staff Member
This guide is the print companion to the video tutorial, “Step 1: Review and Select Competencies with Staff Member.” Additional instructional content for the Annual Performance Evaluation Process is available on the Annual Performance Evaluation webpage of the Human Resources website.

If you have other questions, please contact the Office of Human Resources via e-mail at humanresources@furman.edu.
In this supervisor presentation, we will provide instructions on Step 1: Review and Select Competencies with Staff Member.

There are a total of eight steps to completing the performance review in Workday.

Step 1 - Review and Select Competencies with Staff Member, which is the topic of this presentation;

Step 2 - Start Performance Review;

Step 3 - Set Review Content (Identify Goals);

Step 4 - Set Review Content (Review Staff Member Goals);
In this presentation we will focus on discussing the competencies with the staff member you supervise and considerations for editing those competencies.

The purpose of this step is to discuss and identify the competencies on which the staff member is to be evaluated.
Step 1: Review and Select Competencies with Staff Member

For this, the supervisor and the staff member should review the job description and last year’s competencies.

The ideal time frame to complete this step is late in the summer, but prior to September 1.

There are circumstances under which no competencies were applicable, no longer applicable, or not available.

Ask whether the staff member is new Furman, hired on or after April 1 of the evaluation year.
Step 1: Review and Select Competencies with Staff Member

**Do Competencies Need to be Updated?**

**New to Furman?**
Hired after
April 1?

**Evaluation Eligible?**
Hired after
March 1?

Ask whether the staff member was not eligible for evaluation during the previous evaluation year...in other words, were they hired during the month of March of the previous evaluation year?

For these staff members, competencies will need to be identified.

If the staff member was eligible, ask whether the staff member was in a different position since the completion of the previous evaluation year. If yes, the previous competencies may not be applicable, so it may be appropriate for new competencies to be identified.
Step 1: Review and Select Competencies with Staff Member

If the staff member is in the same position, have you both determined that the staff member be evaluated using different competencies?

Here is what you should do. First, view the current competencies of your direct reports.

To learn how to accomplish this task, go to the Annual Performance Evaluation page on the Human Resources website and download "How to View Competencies."
Step 1: Review and Select Competencies with Staff Member

Follow those instructions to review the competencies of your direct report. If your direct report was not previously evaluated, this information most likely is not available.

Second, meet with your direct report.

Discuss the job description, review the competencies and discuss updating the competencies.
If your direct report is new, identify the competencies on which the staff member will be evaluated.

To see a description of the competencies, go to the Annual Performance Evaluation page on the Human Resources website and download “Overview of Competencies and Ratings.”

Third, if necessary, edit the competencies in Workday.
To learn how to accomplish this task, go to the Annual Performance Evaluation page on the Human Resources website and download “How to Edit Competencies.”

Follow those instructions to update the competencies. If you’re thinking, “I don’t remember having to do this before...”

You are correct. This is a change in the process. Previously, supervisors advised of the competencies and the Office of Human Resources uploaded the competencies.
Step 1: Review and Select Competencies with Staff Member

The change was made because supervisors are now familiar enough with Workday to successfully execute this task. This change allows supervisors to take ownership of the process.

Step 1 is complete. Action next required by the supervisor is Step 2: Start Performance Review.

Instructions for this step can be downloaded from the Annual Performance Evaluation page of the Human Resources website.
Step 1: Review and Select Competencies with Staff Member

Thank you for reading. If you have questions, please send an e-mail to humanresources@furman.edu.