Step 2: Start Performance Review
This guide is the print companion to the video tutorial, “Step 2: Start Performance Review.” 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.
Step 2: Start Performance Review

In this supervisor presentation, we will provide instructions on Step 2: Start Performance Review.

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

Step 1 - Review and Select Competencies with Staff Member;

Step 2 - Start Performance Review which is the topic of this presentation;

Step 3 - Set Review Content (Identify Goals);

Step 4 - Set Review Content (Review Staff Member Goals);
Step 2: Start Performance Review

Steps for the **Supervisor** and the **Staff Member**

**Step 5:** Start Performance Review (with the Option to get Feedback)

**Step 6:** Complete Manager Evaluation for Performance Review

**Step 7:** Provide Employee Comments

**Step 8:** Provide Manager Comments and Submit

Step 5 - Start Performance Review (with the Option to get Feedback);

Step 6 - Complete Manager Evaluation for Performance Review;

Step 7 - Provide Employee Comments; and

Step 8 - Provide Manager Comments and Submit.

In this presentation we will focus on starting the actual performance evaluation.

The purpose of this step is to initiate the written performance evaluation at the conclusion of the evaluation period.
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There are three ways to start a performance review of a staff member you supervise:

1. Team Performance icon
2. Performance
3. And Actions.

We will start with the Team Performance Icon.

From the home page, click “Team Performance” in your worklets.
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Click “More” to reveal all action items.

Then click “Start Performance Review.”

Click in the Employee box and click “My Team.”
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Click in the circle next to the name of the employee whose performance review you wish to start.

In the Review Template box, click “Annual Performance Evaluation.”

Then click Annual Performance Evaluation for the applicable evaluation year.
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The Period Start Date box and the Period End Date box will populate automatically.

Click “Submit.”

The evaluation has been successfully started will route to the respective staff member for Step 3: Set Review Content. Click “View Details.”
Step 2: Start Performance Review

From this screen you can click “Start Performance Review for Employee” under “Do Another” or if finished, you can click “Done.”

You may also execute this step by accessing the Performance tab for a specific direct report.

From the home page, type the name of the staff member in the search bar and click enter.
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Click on the name of the staff member in the search results.

On the lower left side of the menu, scroll to and click “Performance.”

If the staff member was evaluated previously, you will see the competencies on which he or she was evaluated, along with the corresponding rating on the screen. Click “Performance Reviews.”
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The name of the staff member is pre-populated. Follow the instructions that were previously provided to complete the process.

The third way to start a performance review is with the Actions button.

To access the Actions button, from the home page, type the name of the direct report into the search bar, and click enter.
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1. Then click on the name of the staff member in the Search Results.

2. Click the Actions button on the top left side of the menu. Scroll to and hover over “Talent” then click “Start Performance Review.”

3. The name of the staff member is pre-populated. Follow the instructions that were previously provided to complete the process.
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A couple of things to remember.

You can get an error message for attempting to start an evaluation that already exist for a previously started and/or completed evaluation period.

If you get the red box saying “Error” click “View All” to view the message.

The message reads, in part, “A performance review already exists for the employee using the review types and period dates.” Click the X.
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If you started the evaluation for the period of review and forgot, click “Cancel.”

Then click “Discard.”

If you inadvertently attempted to start an evaluation for a previous evaluation year, in the Review Template box, check the evaluation for the appropriate evaluation year and click “Submit.”
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The second error you may get is because a previous evaluation is incomplete and has not advanced beyond the Set Review Content stage by either you as the supervisor, a previous supervisor, or the direct report.

Click View All to review the message.

The message reads, “A new review cannot be started because a review is still in progress which has contents that need to be carried over into the new review.”
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What does this mean? It means that either the staff member or the supervisor hasn’t advanced a prior evaluation beyond Step 3 or Step 4, respectively.

To stop viewing the message, click the X...

and click “Cancel.”
Then click “Discard.”

If the evaluation is sitting with the staff member, ask them to make certain the status of their goals is “Successfully Complete or Not Applicable” on that evaluation and complete the necessary step to advance the previous evaluation to you.

Once that is completed the evaluation for the current period may be started.
If a prior evaluation is sitting with you as the supervisor. Make certain the status of your direct report’s goals is “Successfully Complete or Not Applicable” on that evaluation.

Once that is completed the evaluation for the current period may be started.

Sometimes, with an outstanding evaluation, a previous supervisor is involved. As the current supervisor, you will need to manage that situation.
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For more information about that and completing both a prior and current evaluation, please view “Managing Multiple Evaluations for a Single Direct Report.”

Steps for the **Supervisor** and the **Staff Member**

**Step 4:** Set Review Content (Review Staff Member Goals)

Step 2 is complete. Next action required by the supervisor is Step 4: Set Review Content.

For more on that step, please view “Step 4: Set Review Content (Review Staff Member Goals)."
Step 2: Start Performance Review

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