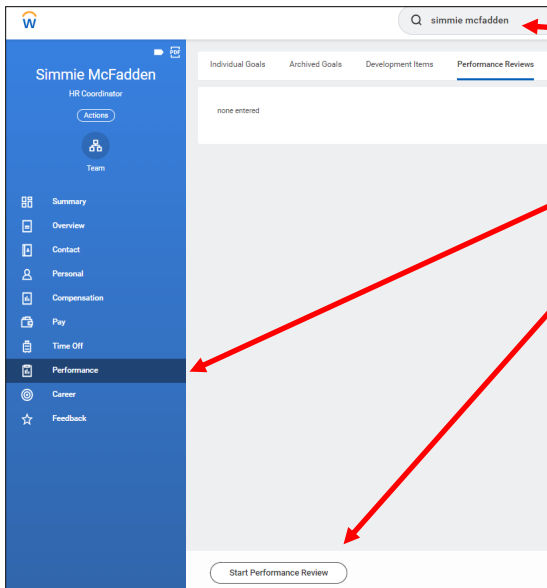


## STEP BY STEP GUIDELINES FOR ADAPTATION CHECK IN



**MANAGER** logs into the Workday home page and types name of employee in the Search bar.

**MANAGER** clicks on Performance in the navigation pane and then clicks on START PERFORMANCE REVIEW.

**MANAGER** selects the template to be used for this employee's check in (initial **ADAPTATION REVIEW** after date of hire or beginning of new job; **ANNUAL REVIEW** used for consultation with HR for a limited number of employees; or **PERIODIC REVIEW** suggested every 3—4 months for most employees). In this example, we are using the 6 month check in.

The **MANAGER** indicates the start date and end date of the period being reviewed (even if it is longer than 6 months). Click on SUBMIT.

**Start Performance Review for Employee**

This Periodic Check In serves as a conversation between an employee and their manager about the most important aspects of their work and goals. The Period Start Date and Period End Date refer to the start and end dates of the period of work being discussed.

Please answer all questions as completely as possible. Both the employee and manager may attach supporting documentation to this check in.

Employee \*

Review Template \*

Period Start Date \*

Period End Date \*

**Start Performance Review for Employee**

This Periodic Check In serves as a conversation between an employee and their manager about the most important aspects of their work and goals. The Period Start Date and Period End Date refer to the start and end dates of the period of work being discussed.

Please answer all questions as completely as possible. Both the employee and manager may attach supporting documentation to this check in.

Employee \*

Review Template \*

Period Start Date \*

Period End Date \*

## Awaiting Your Action



Self Evaluation: Adaptation Review: Simmie McFadden

Inbox - 13 second(s) ago

Complete Self Evaluation Self Evaluation: Adaptation Review: Simmie McFadden



Review Period 12/01/2022 - 01/15/2023

1 minute(s) ago - Effective 01/15/2023

Congratulations on the first six months in your new role! This check in provides an opportunity for you and your manager to discuss how well you are adapting to your role and to set some goals for the upcoming months. Please answer all questions.

Get Started

... **EMPLOYEE** will receive a notice in their inbox about a self evaluation. When the employee clicks on the task, they can view the evaluation period. Click the GET STARTED button to begin.

The blue navigation pane on the left side of the screen assists the **EMPLOYEE** in following the steps of the check in: answer the QUESTIONS for the check in, add personal and professional GOALS, attach any SUPPORTING DOCUMENTS, and REVIEW and SUBMIT to your manager.

## CHECK IN QUESTIONS

The **EMPLOYEE** answers each question in the space provided — the space will expand if necessary as you type in the box.

1. Has your role met your expectations? Why/why not?
2. Do you have the tools you need to complete the job? If not, what do you need?
3. Tell me about your successes and frustrations so far?
4. What are the favorite aspects of your position thus far?
5. What else do you need? What additional help or support do you need to be successful? What are you still learning about your role?

It is important that you answer each question as honestly and completely as you can. Click NEXT. Be sure to attach any supporting documentation you wish to share with your manager.

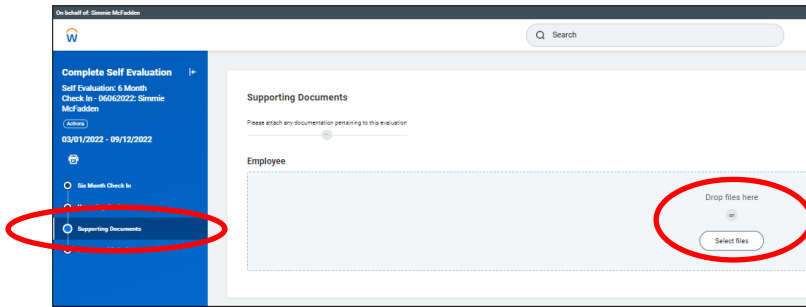
## GOALS

As an **EMPLOYEE** you can indicate one or more personal or professional goals.

1. Type in the name and description of your goal.
2. Assign a due date for completion of the goal.
3. Select a goal category (e.g., professional development, educational, etc.)
4. Add in the current status of your goal. Have you already started to work toward the goal, or not started yet?
5. Add any additional comments in the text box.. Add any additional goals by following these same steps.
6. Add any supporting documentation if necessary.

## SUPPORTING DOCUMENTATION

The **EMPLOYEE** should attach any supporting documentation pertaining to the self-reflection or the goals that were entered. The easiest way is to upload .pdf documents from your computer or mobile device.



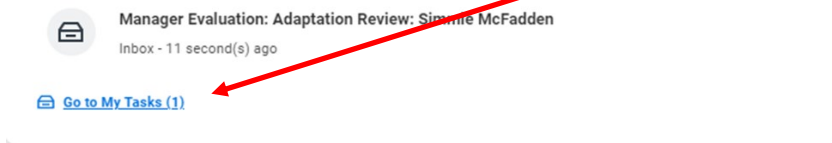
## REVIEW AND SUBMIT

The last step is to review all of the information, MAKE ANY EDITS IF NECESSARY, and click on **SUBMIT** to send your check in to your manager.

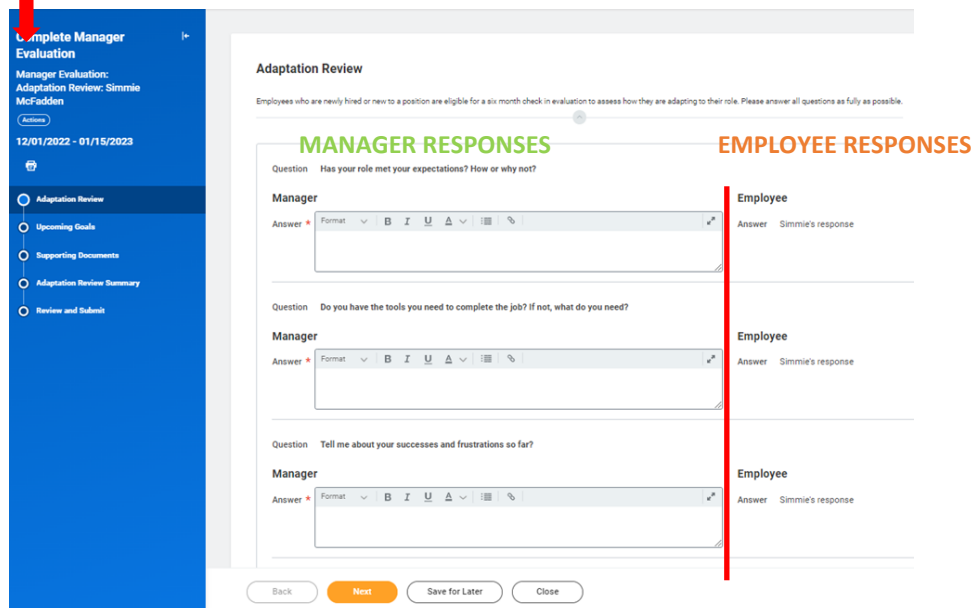


The **MANAGER** will receive the check in responses the **EMPLOYEE** submitted as a task in their Workday inbox. Click on the task to begin.

## Awaiting Your Action



The **MANAGER** 's screen has the same navigation pane on the left and remainder of the screen is split: there are text boxes for the **MANAGER** to respond to the same questions as the **EMPLOYEE** whose responses are displayed on the right. The **MANAGER** has one additional question to answer, may add, remove, and/or edit goals, and attach supporting documents



**Complete Manager Evaluation**

Manager Evaluation: Adaptation Review: Simmie McFadden

12/01/2022 - 01/15/2023

Adaptation Review

Upcoming Goals

Supporting Documents

**Adaptation Review Summary**

Review and Submit

**Adaptation Review Summary**

Manager

Rating: Successful/Meets Expectations

Rating Description: Performance either is building towards learning a new role

enter your comment

Process History

Tama Spoerri

Complete Manager Evaluation for Performance Review - Awaiting Action

Submit Send Back Save for Later

## CHECK IN SUMMARY

After the **MANAGER** has completed the questions, they need to select a check in summary rating: Exceptional Performance, Exceeds Expectations, Successful/Meets Expectations, Needs Improvement, and Inconsistent/Unsatisfactory. The rating description will be displayed underneath the selection. The **MANAGER** should review all goals and any supporting documentation before clicking SUBMIT.

The **MANAGER** check in / **EMPLOYEE** self-reflection is automatically forwarded to a Human Resources Performance Partner for review. The Performance Partner can send the check in back to the **MANAGER** for edits if necessary. Once the check in is approved, the **MANAGER** will receive a task in their Workday inbox to schedule a performance review meeting with the **EMPLOYEE**.

**Adaptation Review Summary**

Manager

Rating: Successful/Meets Expectations

Rating Description: Performance either is building towards learning a new role or fully meets the established job expectations and may on occasion exceed expectations.

When the meeting is planned, the **MANAGER** may print out a copy of the check in. **IMPORTANT!!** Once the **MANAGER** clicks SUBMIT that they have completed the task of scheduling the face to face meeting, the contents of the check in are immediately visible to the **EMPLOYEE**. The **MANAGER** may want to meet with the **EMPLOYEE** prior to clicking SUBMIT to prevent unexpected employee access to the check in contents and comments.

The **EMPLOYEE** will have a new task in their inbox to acknowledge the recent check-in and they can view and print the check in.

**All Items**

5 items

Search: All Items

Manager Evaluation: Adaptation Review: Simmie McFadden

Effective: 01/15/2023

**Provide Employee Review Comments** Manager Evaluation: Adaptation Review: Simmie McFadden

Evaluated By: Mark A Dickey

Review Period: 12/01/2022 - 01/15/2023

The employee acknowledges that they have met with their manager to discuss pertinent performance during the first six months in this role.

Get Started

## SUMMARY AND ACKNOWLEDGEMENT

The **EMPLOYEE** may review all of the contents of the check in including answers to questions, goals and comments, and any supporting documentation. Click on **NEXT** to move to the acknowledgement.

The **EMPLOYEE** may not agree with all of the aspects of the check in. so there are three different acknowledgements:

1. I have met with my supervisor to discuss my check in and have read and accept the accompanying comments.
2. I have met with my supervisor to discuss this check in and my most recent performance, but I would like to discuss further.
3. I refuse to sign my check in because I do not agree with my manager's assessment, but I acknowledge that I have received it.

After the **EMPLOYEE** submits their acknowledgement, the **MANAGER** also receives a task in their Workday inbox to acknowledge the check in. The **MANAGER's** acknowledgement status and Comments box is presented alongside the **EMPLOYEE** acknowledgement ( just like the check in itself).

**Provide Manager Review Comments**  
Manager Evaluation: Adaptation Review: Simmie McFadden  
12/01/2022 - 01/15/2023  
Evaluated By: Mark A Dickey

**Acknowledgement**

**Manager**

Status \* Search

Comment

**Employee**

Status

Comment

Acknowledged By

Acknowledgement Date

Process History

Mark A Dickey  
Complete Manager Evaluation for Performance Review- Submitted  
43 minutes ago

Either the **MANAGER** or **EMPLOYEE** can view and/or print the **GOALS** expressed in the check in, **DEVELOPMENT** items, or the check in itself—**PERFORMANCE REVIEWS**. Goals that have already been achieved are available in **ARCHIVED GOALS**.

In this example, two goals were set in the check in between the employee and manager and details are available.

**Simmie McFadden**  
HR Coordinator  
Team

**Individual Goals**

2 items

Sort By: ...

learn how to use Workday to bulk email certain groups of employees on campus  
Incomplete/Not Started  
Departmental

Take some advanced Excel classes online or in-person...  
Partially Complete  
Professional...

**View Goal**

Goal \* learn how to use Workday to bulk email certain groups of employees on campus

Description

Category Departmental

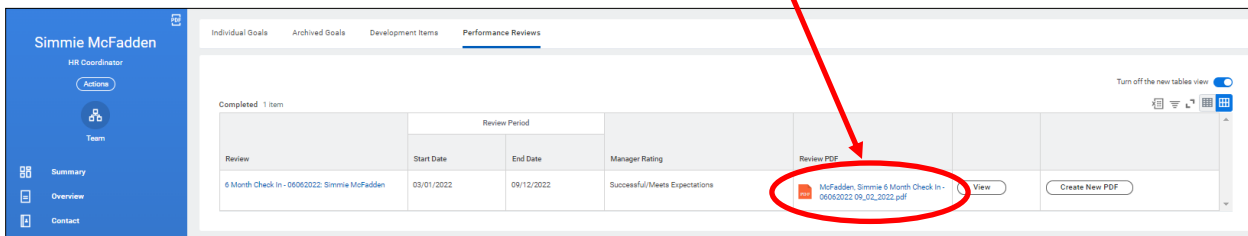
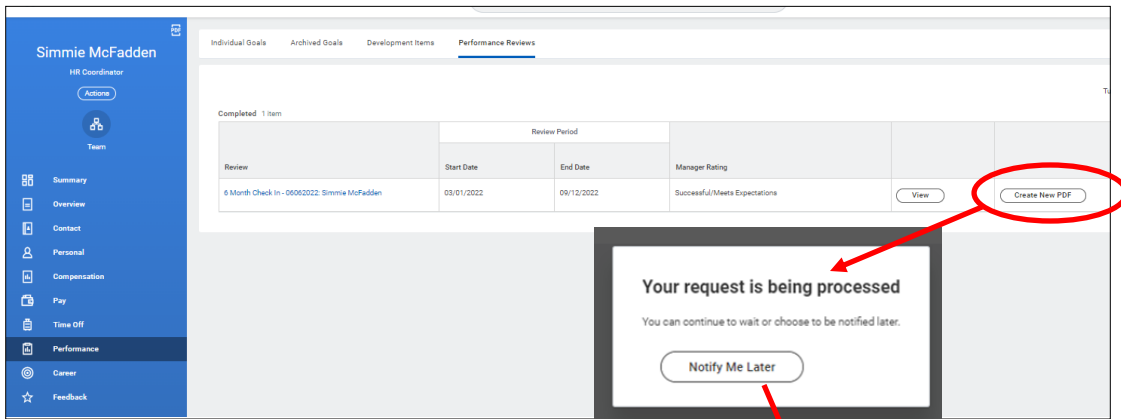
Status Incomplete/Not Started

Supports (empty)

Due Date 01/01/2023

Associated Reviews 6 Month Check In - 06062022

To view or create a printable PDF copy of the check in, click on the Performance Reviews tab and select VIEW or CREATE NEW PDF. You may receive a processing notification while the PDF copy is being created — this is normal, click on Notify Me Later. When the screen refreshes, click on the document in the Review PDF column.



The final print version includes all portions of the check in including any goals, supporting documentation, comments, and acknowledgements.

The printed version of the 6 Month Check In form for Simmie McFadden, HR Coordinator, includes the following sections:

- 6 Month Check In Summary:** Manager Overall Evaluation (Rating: Successful/Meets Expectations).
- Acknowledgement:** Manager (Tama Spoerni) and Employee (Simmie McFadden) comments.
- Upcoming Goals:** Due Date: 01/01/2023, Category: Departmental, Status: Incomplete/Not Started. Goal: Learn how to use Workday to bulk email certain groups of employees on campus.
- Six Month Check In:** Has your role met your expectations? How or why not? (Manager and Employee responses).
- Do you have the tools you need to complete the job? If not, what do you need?** (Manager and Employee responses).
- Tell me about your successes and frustrations so far?** (Manager and Employee responses).



## PRINTING A PERFORMANCE REVIEW WHILE IT IS IN PROCESS (NOT FINALIZED)

Individual Goals	Archived Goals	Development Items	Performance Reviews
In Progress 1 item			
Review	Review Period		Status
Start Date	End Date		
Periodic check in: Cindy Bessmer	01/01/2022	09/30/2022	Review Complete Manager Evaluation

Employee and managers may craft their responses to questions outside of Workday and then copy and paste them in, or may respond directly in Workday. In order to print responses before the check in is completely finalized, follow these steps. Navigate to the Performance tab and locate the check-in in progress.

Click on the related actions ellipsis (...) next to the action in process to reveal another menu.

Click on the Talent tab to reveal the option "View Printable Employee Review."

When you click on the Printable option, you have the option of printing an Excel file or a pdf.

EXCEL FORMAT

PDF FORMAT

	A	B	C	D	E	F
1	<b>Performance Check In</b>					
2	<b>Save for Later</b>					
3	Question	What is going well? What are the "wins" in this evaluation cycle?				
4	Manager					
5	Answer	Manager response				
6	Employee					
7	Answer	Employee self-reflection				
8	Question	What didn't turn out for you?				
9	Manager					
10	Answer	Manager response				
11	Employee					
12	Answer	Employee self-reflection				
13	Question	What else is going on?				

Performance Check In

11:54 AM  
10/28/2022  
Page 1 of 3

**Question**  
What is going well? What are the "wins" in this evaluation cycle?

**Manager**  
**Answer**  
Manager response

**Employee**  
**Answer**  
Employee self-reflection