

Annual Performance Reviews

The annual performance review cycle is a collaborative process between the direct/initiating manager, the team member and an (optional) additional manager.

The initiating/direct manager and team member will complete the evaluation process in Workday to determine a numerical score that indicates a team member's performance based on established performance competencies and the team member's individual operational goals. See the graphic below for more details.

The Core Values represent Goodwill's principles and standards of behavior; All team members are held to the standards of: Trust, Collaboration, Engagement, Ownership and Innovation.

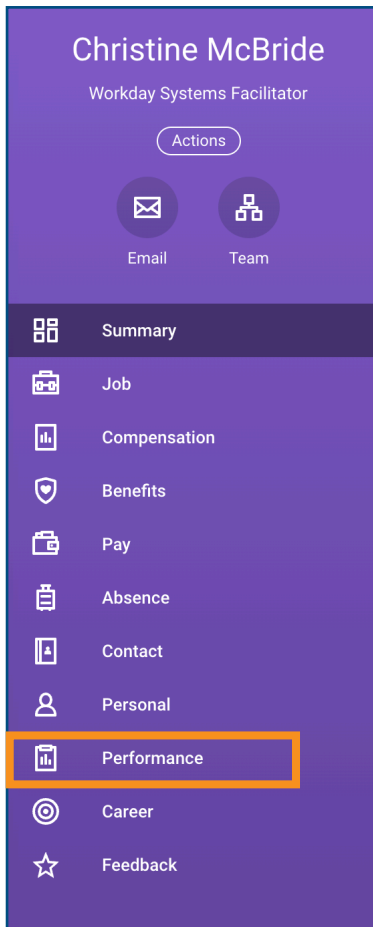
Rate performance for each of the Core Values using the scale below:

- **1-Below Expectations:** Does not consistently perform to established expectations. Needs improvement to be successful.
- **2-Meets Expectations:** Performance is generally successful and has opportunity to grow in a few areas.
- **3-Exceeds Expectations:** Consistently demonstrates high performance and serves as a role model to others.

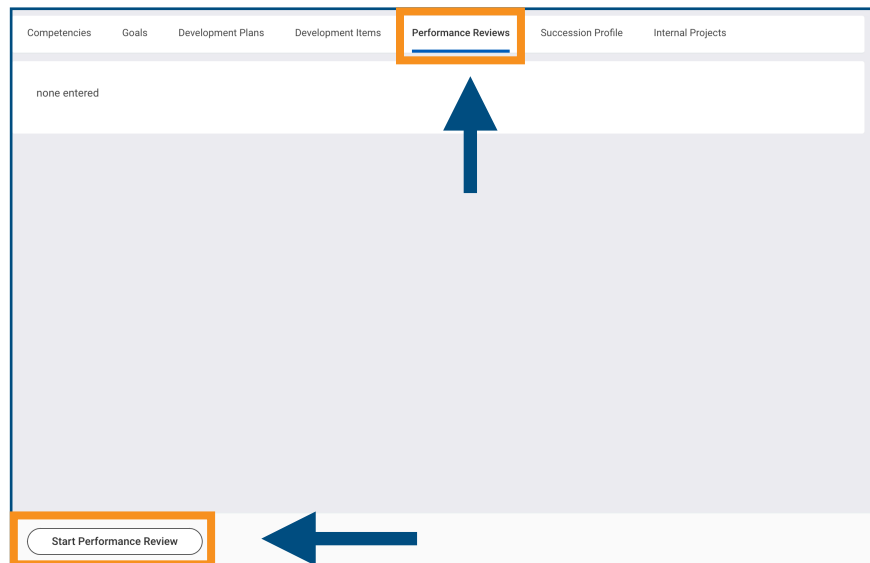
Steps in the Annual Performance Review Cycle

1. The direct/initiating manager starts the review process in Workday
2. The initiating manager requests additional manager feedback (optional step)
3. The team member submits their self-evaluation in Workday and the additional manager submits their feedback (if applicable)
4. The initiating manager submits their evaluation
5. The team member acknowledges their review
6. The initiating manager manager submits their final acknowledgment of the team member's review

1: Beginning the Annual Review Process in Workday: Steps for the Initiating Manager

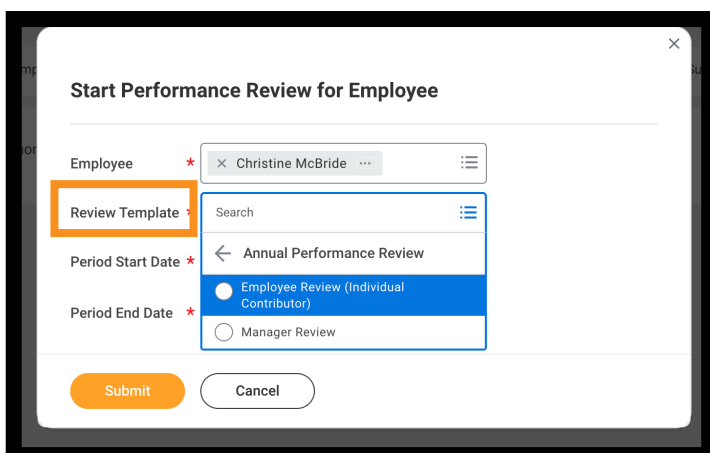


1. Navigate to the appropriate team member's Workday profile and click **Performance** from the sidebar.



2. Click the **Performance Reviews** tab > **Start Performance Review**

3. In the *Review Template* box select, **Type > Annual Performance Review > Employee Review (Individual Contributor) OR Manager Review!**



Note: The “Employee Review (Individual Contributor)” template should be selected for team members who are **not** in supervisory roles and do **not** have direct reports. In contrast, the “Manager Review” template should be selected for team members in supervisory roles with direct reports.

4. Select the appropriate period start and end dates.

Start Performance Review for Employee

Employee *

Review Template *

Period Start Date *

Period End Date *

Note: The period start date should be the team member's anniversary date of hire. The period end date should be the date before the team member's anniversary date of hire. For example, if the team member's hire date is 5/22 the period start date should be 5/22/24 and the end date should be 5/21/25.

5. Click the orange **Submit** button

Note: This will trigger the performance self-evaluation task to route to the team member's Workday "My Tasks" inbox.

6. Click **Open** to Request Additional Manager Feedback (Optional) **OR** click **Skip** if additional manager feedback is not necessary.

Start Performance Review Confirmation

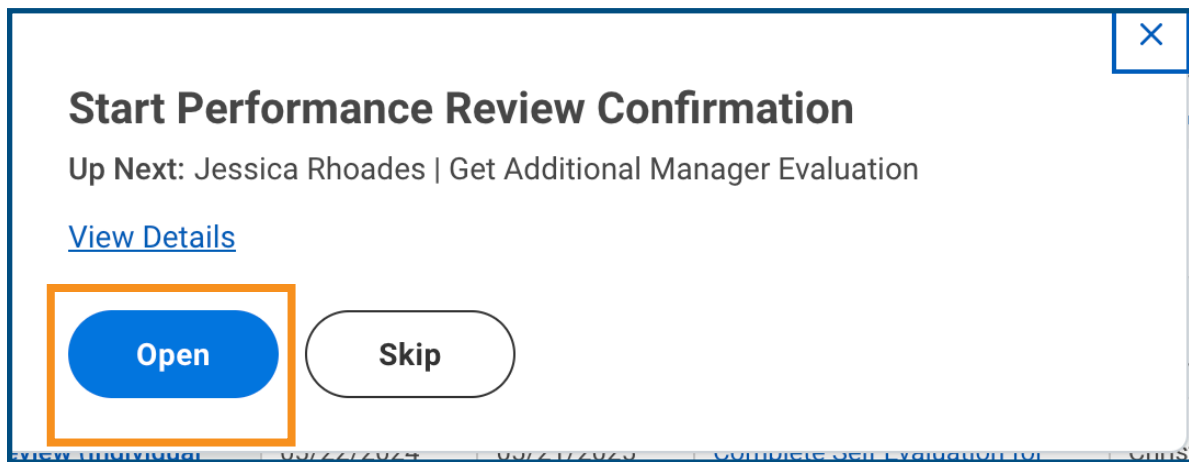
Up Next: Jessica Rhoades | Get Additional Manager Evaluation

[View Details](#)

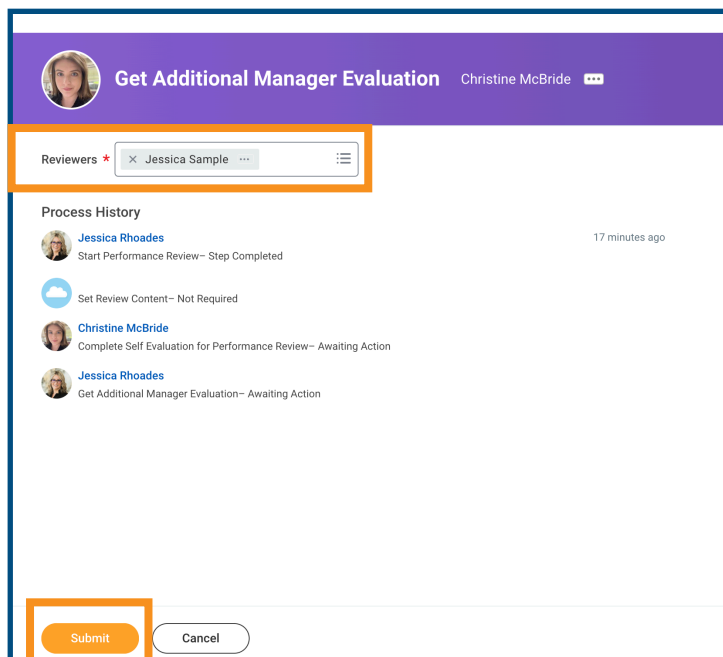
2: The Initiating Manager Requests Additional Manager Feedback (Optional Step)

Note: Additional manager feedback might be helpful if the team member has only been under the direct supervision of the initiating manager for a short amount of time during the current annual review cycle (e.g. recent transfer) or if the team member worked on significant projects under the guidance of another manager.

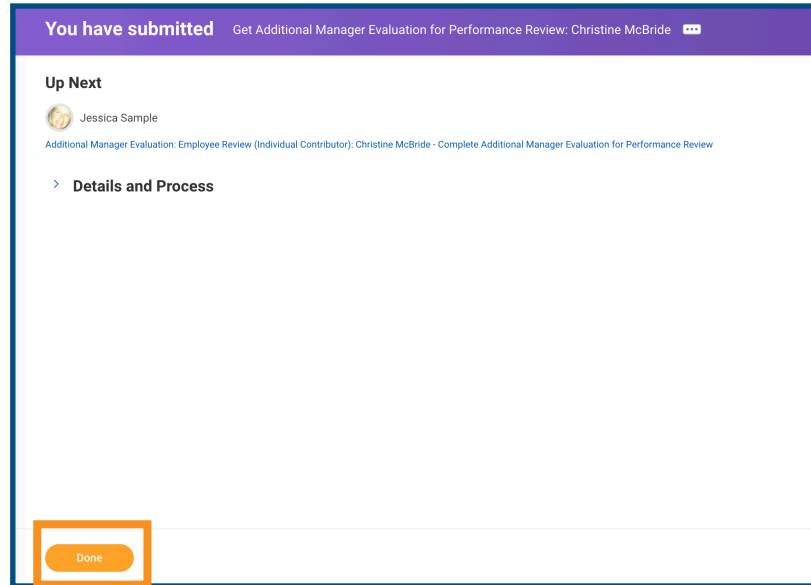
1. Click **Open** to Request Additional Manager Feedback.



2. In the *Reviewers* box, type the name of the appropriate manager and click the orange **Submit** button



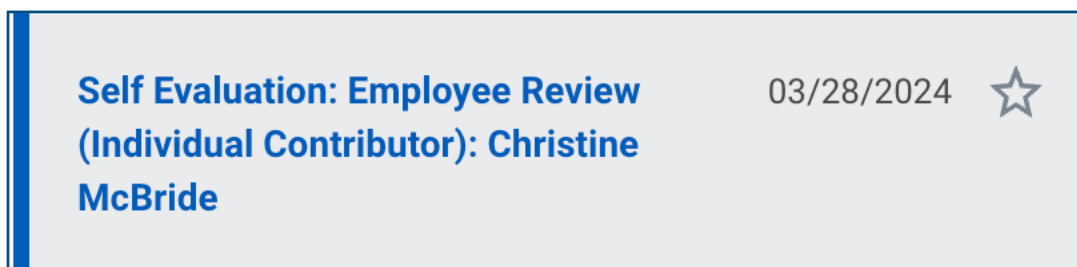
3. Click the orange **Done** button.



Note: The request for additional manager feedback will be sent to the receiving manager’s “My Tasks” inbox, however, the initiating manager will **NOT** be notified when the additional manager has submitted their feedback request. Additional managers will **not** be able to rate the team member, but will be able to provide comments. Once the additional manager has submitted their feedback they should communicate with the initiating manager that they have completed their feedback.

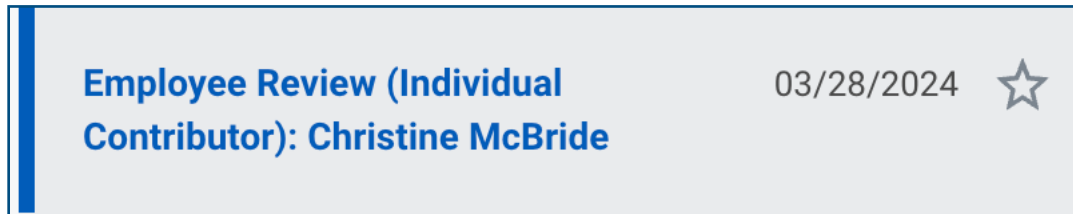
3: Team Member Self-Evaluation: Steps for the Team

1. Navigate to your Workday “My Tasks” inbox to access the performance review self-evaluation.

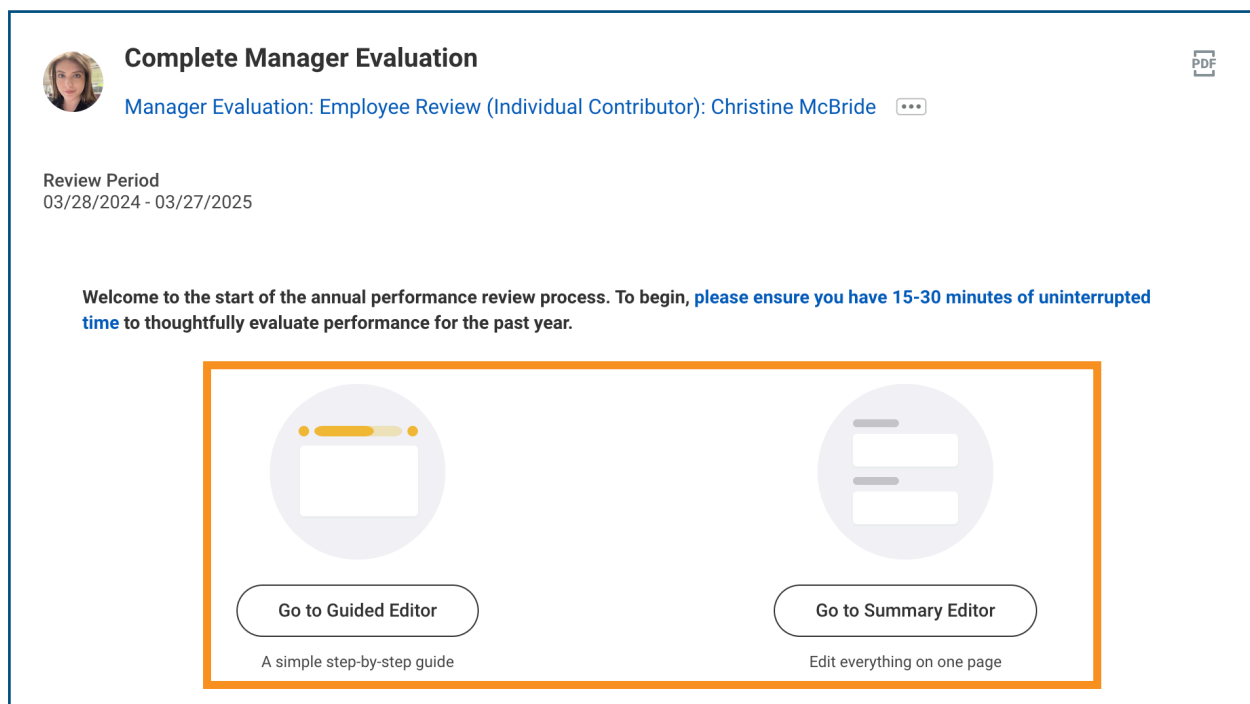


4: The Initiating/Direct Manager Submits Their Evaluation

1. Navigate to your Workday “My Tasks” inbox to access the “Employee/Manager Review”



2. Navigate to your Workday “My Tasks” inbox to access the “Employee Review/Manager Evaluation”



3. Complete the *Manager Evaluation* by providing ratings and comments for each performance competency and the team member’s individual operational goals.

Note: Managers will be able to view the the rating and comments from the team member's self-evaluation for each competency and individual operational goal and the comments from any additional manager feedback (if any).

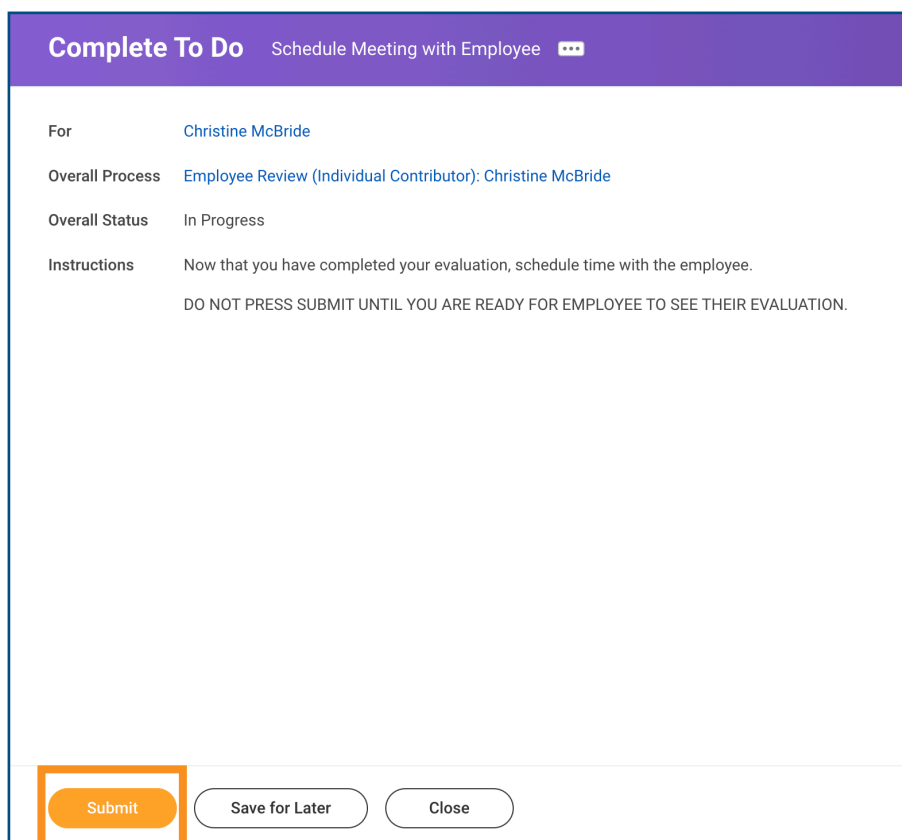
The screenshot shows a performance evaluation form for the competency 'Trust'. The form is divided into several sections:

- Competency:** Trust (highlighted with an orange box and labeled 'Performance Competency').
- Description:** What Trust looks like in action when done well:
 - Making relationships as important as results.
 - Doing the right thing even when no one is looking.
 - Doing what we say we will do.
 - Having the courage to resolve differences.
 - Respecting the uniqueness of every individual.
- Manager Evaluation:** Includes a 'Manager Rating *' dropdown menu with options: 'Meets Job Expectations' (selected), 'Does Not Meet Expectations', and 'Exceeds Job Expectations'. Below the dropdown is a text area for 'Example comment'.
- Employee Evaluation:** Includes an 'Employee Rating' dropdown menu with the option 'Meets Job Expectations' selected, and a text area for 'Example comment' (highlighted with an orange box and labeled 'Team member self-rating and comment').
- Additional Manager Feedback:** Includes the name 'Jessica Sample' and a text area for 'Additional manager comment example' (highlighted with an orange box and labeled 'Additional manager name and comment (if any!)').

Navigation icons (back and checkmark) are located in the top right corner.

4. Click the orange **Submit** button when complete

5. Schedule a meeting with the team member to discuss their evaluation. When the manager is ready for the team member to see their performance review click the orange **Submit** button. This will route the manager’s evaluation to the team member’s “My Tasks” Workday inbox.



The screenshot shows a modal window titled "Complete To Do" with the subtitle "Schedule Meeting with Employee". The modal contains the following information:

- For:** Christine McBride
- Overall Process:** [Employee Review \(Individual Contributor\): Christine McBride](#)
- Overall Status:** In Progress
- Instructions:** Now that you have completed your evaluation, schedule time with the employee.
DO NOT PRESS SUBMIT UNTIL YOU ARE READY FOR EMPLOYEE TO SEE THEIR EVALUATION.

At the bottom of the modal, there are three buttons: "Submit" (highlighted with an orange border), "Save for Later", and "Close".

Note: Managers can wait to submit their evaluation until they are in the meeting with the team member if they do not want the team member to view their performance review prior to the meeting.

5: The Team Member Acknowledges Their Review

Note: It is recommended that this process takes place during the meeting with the team member’s manager to discuss their performance

1. Navigate to your Workday “My Tasks” inbox to access the “Employee Review” task
2. Select **Acknowledge Review without Comments** **OR** **Acknowledge Review with Comments** **Note:** Comments are optional.

Provide Employee Review Comments PDF

Manager Evaluation: Employee Review (Individual Contributor): Christine McBride

Evaluated By [Christine McBride](#) | Review Period 03/28/2024 - 03/27/2025

Your annual performance review is finalized. To conclude the review process [please complete the Employee Acknowledgement](#) section below to confirm that you have received your review; You may also add comments as appropriate.

To access your completed performance review, go to your Workday Profile page > Performance > Performance Reviews.

Thank you for all that you do to help further Goodwill’s Mission of Ending Poverty Through the Power of Work.

Acknowledgement

Acknowledge Review without Comments

Acknowledge Review with Comments

Status *

Search

Comment

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

Submit | Save for Later | Close

3. Click the orange **Submit** button when complete

6: The Manager Acknowledges Their Review

1. Navigate to your Workday “My Tasks” inbox to access the “Manager Evaluation” task
2. Select **Acknowledge Review without Comments** OR **Acknowledge Review with Comments** **Note:** Comments are optional.

Provide Manager Review Comments PDF

Manager Evaluation: Employee Review (Individual Contributor): Christine McBride ⋮

Evaluated By [Christine McBride](#) | Review Period 03/28/2024 - 03/27/2025

Your employee has completed the *Employee Acknowledgement* step of the annual performance review process.

To conclude the overall process [please complete the Manager Acknowledgement](#) section below; You may also add comments as appropriate.

To access the employee's completed performance review, go to the employee's Workday Profile page > Performance > Performance Reviews.

Thank you for all that you do to help further Goodwill's Mission of Ending Poverty Through the Power of Work.

Acknowledgement

Manager Acknowledgement

Acknowledge Review without Comments

Acknowledge Review with Comments

Comment

Format ▼ **B** *I* U ▲ ▼ ☰ 🔗 🔍

Employee Acknowledgement ↶ ✓

Status [Acknowledge Review without Comments](#)

Comment

Entered by [Christine McBride](#)

Submit Save for Later Close

Team member acknowledgment and comment (if any)

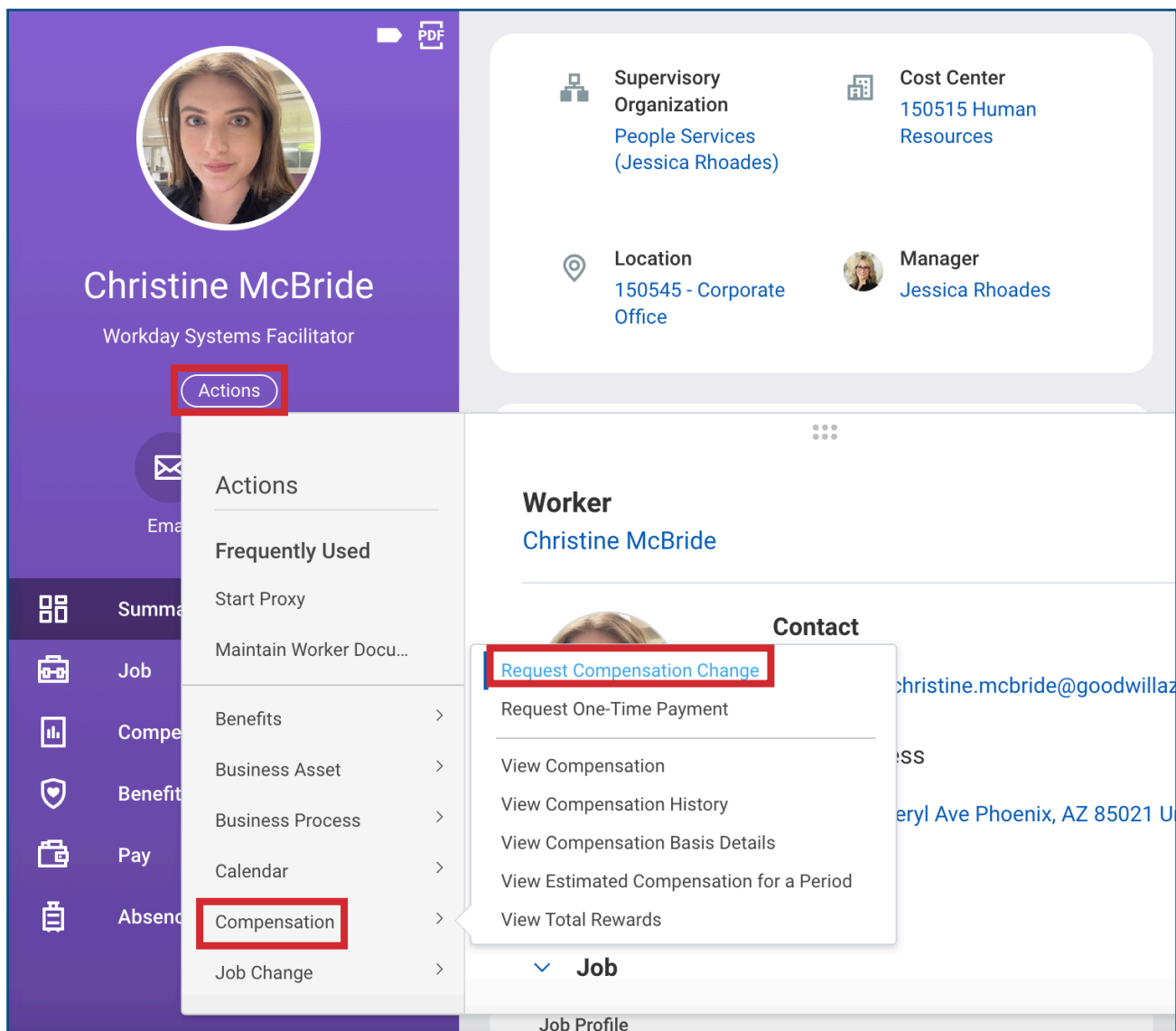
3. Click the orange **Submit** button when complete

Note: The Annual Performance Review process is complete!

Compensation Change Requests

This guide outlines the steps for managers to submit compensation change requests on behalf of their team members (i.e. annual merit increases following a performance review). If you have specific questions about compensation changes for your team please reach out to your leader or the Compensation Team for guidance.

1. Navigate to the appropriate team member's Workday Profile.
2. Click **Actions > Compensation > Request Compensation Change**



3. Select the appropriate *Effective Date* and then click **OK**. **Note:** The effective date will automatically default to the beginning of the next pay period.

Request Compensation Change [X]

Effective Date * 06/16/2024 [Calendar Icon] [?]
 Compensation effective date for SALARY team members must always be the first day of a pay period (Sunday).

Use Next Pay Period

Employee * [X] Christine McBride [Menu Icon]

Cancel [OK]

IMPORTANT! The *Effective Date* for **salaried** team members should be the Sunday of a new pay period closest to the employee’s anniversary date of hire. **Note:** The effective date can be backdated to a past date or set to a future date.

IMPORTANT! The *Effective Date* for **hourly** team members should be the employee’s anniversary date of hire. **Note:** The effective date can be backdated to a past date or set to a future date.

4. Click **Reason**

Compensation

Effective Date & Reason

Effective Date [Edit Icon]
06/16/2024

Use Next Pay Period
Yes

Reason

4. Click **Request Compensation Change > Base Salary Change**

Compensation

Effective Date & Reason

Effective Date * 06/16/2024

- Request Compensation Change > Base Salary Change
- Request Compensation Change > Bonus Structure Change
- Request Compensation Change > Variable Compensation Change

Search

> Details

5. Select the appropriate option. **Note:** Select *Merit* for annual raises.

Compensation

Effective Date & Reason

- Request Compensation Change > Base Salary Change
- Base Salary Change > Correction
- Base Salary Change > Equity Adjustment
- Base Salary Change > Job Reclassification
- Base Salary Change > Merit
- Base Salary Change > Step Increase

Search

> Details

Correction: To correct a previous pay rate entry or classification.

Equity Adjustment: Compensation adjustments as directed by Human Resources, after an equity analysis has been run.

Job Reclassification: Compensation adjustments as directed by Human Resources should the job be reclassified.

Merit: Compensation increase given to team members, usually at the completion of a performance review.

6. Skip employee visibility date.

7. Select the *Salary* tile if the team member is salaried **OR** select the *Hourly* tile if the team member is hourly.

The screenshot shows a user interface with two main sections. The top section is titled "Salary" and is highlighted with a red box. It contains the following information: "Assignment Details" with a value of "72,450.00 USD Annual", "Plan Name" as "Salary Plan", and "Effective Date" as "05/19/2024". Below this information is an "Add" button. The bottom section is titled "Hourly" and is also highlighted with a red box. It contains an "Add" button.

8. Adjust the amount by either entering the **total amount**, **OR amount change**, **OR the percentage change**. Workday will automatically calculate the changes when information is entered into any of the categories. **Note:** It is often easiest to adjust the percentage change.

This screenshot shows the "Compensation Plan" configuration for a "Salary Plan". The "Total Base Pay Range" is set to "4". The "Apply FTE%" option is set to "Yes". Three input fields are highlighted with red boxes: "Amount *" (empty), "Amount Change" (0.00), and "Percent Change" (0). Below these are dropdown menus for "Currency *" (set to "USD") and "Frequency *" (set to "Annual").

This screenshot shows the "Compensation Plan" configuration for an "Hourly Plan". The "Total Base Pay Range" is set to "1". Three input fields are highlighted with red boxes: "Amount *" (1), "Amount Change" (0.00), and "Percent Change" (0). Below these are dropdown menus for "Currency *" (set to "USD") and "Frequency *" (set to "Hourly").

8. Skip Allowance, Merit, Bonus and Other.

9. Click **Submit**