

Annual Review - Manager

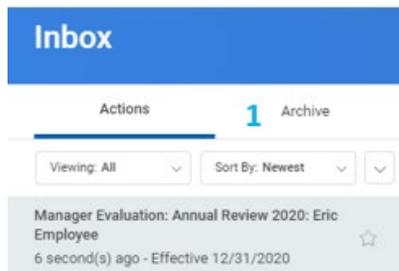
Overview

The Annual Review is an opportunity for you and your employee to evaluate his/her performance over the previous year. You will rate your employee's performance based on WHAT he/she accomplished (goals) and the WAY he/she approached work (Competencies).

Who Does This: Manager

Things to Know:

- This process occurs once per year. After the Annual Review process is launched and your employee completes the Self Evaluation, you will receive an Inbox task to complete the Manager Evaluation.
- You are required to add comments and ratings for each Goal. Ratings for each Goal will be averaged and visible as the calculated rating for this section.
- You are required to add comments and ratings for each Competency. Ratings for each Competency will be averaged and visible as the calculated rating for this section.
- You are required to add overall comments. The overall rating will calculate automatically as an average of the calculated ratings for the Goals section and the calculated ratings for the Competencies section.



Step 1

Choose the Inbox task **Manager Evaluation: Annual Review**.

Complete Manager Evaluation

Manager Evaluation: Annual Review 2020: Eric Employee Actions

MANAGER INSTRUCTIONS: 2

The Annual Review provides an opportunity to assess and provide feedback to your employees about their performance throughout the year. Along with assessing career goals and competencies, the annual evaluation helps plan for the future by identifying areas for growth and development.

Please click on **Get Started** below, and you will be guided through each section of the manager evaluation. You will have an opportunity to review the evaluation in its entirety before submitting. After review, please click "submit" on the summary page. For detailed instructions, refer to the Annual Review job aid on the [Workday Help](#) site.

Get Started

3

Step 2

Review the Manager Instructions help text to help guide you through the review process.

Step 3

Click on **Get Started**.

A screenshot of a data table titled 'Employee Feedback Received within Performance Period'. The table has columns for 'Confidential', 'From', 'Question', 'Comment', 'Feedback Type', 'Requested By', and 'Date'. There is a 'Refresh' button at the top left and a 'Download to Excel' button at the bottom right. A gear icon (4a) and a close icon (4b) are overlaid on the table.

Step 4

If your employee has received any feedback during the calendar year, it will automatically open for you to view the data.

Step 4a

Click on the Gear icon  if you want to export the feedback data to Excel.

Step 4b

Click on the x to close the feedback data.



The *Guided Experience* will take you through each section of the employee's evaluation. The left side of your screen will highlight the section you are currently editing. You do have the capability to move between review sections by selecting it from the left side of your screen.

The icons in the menu bar provide you the ability to view the embedded analytics and to print the employee review.

Goals and Objectives

MANAGER INSTRUCTIONS:

Please review the status and comments that your employee included for each goal below. You can make changes to the goal, description, due date, category, and status. Any updates to these fields will be stored in the "History" section below that goal.

You are required to add a rating and a comment for each goal. Comments from the mid-year review will populate, so please ensure that you review and update as needed. Deferred or cancelled goals are inactive and must be removed prior to submitting.

If the employee has been in current role less than 4 months and there has been insufficient time to evaluate a goal, you may select "Too New To Rate" as the rating for that goal. Any goal with this rating will be excluded from the overall calculated rating. You are still required to provide comments even if a goal is too new to rate.

When you are satisfied with the Goals and Objectives section, you can click "Next" to proceed to the next review section. You can also click "Save for Later" and this task will remain in your inbox until you are ready to take further action.

Step 5

Please read the help text instructions titled **MANAGER INSTRUCTIONS** at the top of the *Goals and Objectives* section. This text will provide guidance on how to complete this section as well as the required fields that must be completed.

Step 6

Review the employee's goal and description. Make any needed changes to the goal or description. Any changes made by you or the employee will be recorded in the History section of the goal. You can view changes by expanding the *History* section under the goal.

Step 7

Review the due date and update if needed.

Step 8

Review the category and update if needed.

Step 9

Review the employee's status to indicate progress on the goal.

Step 10

If completed, review your employee's optional comment.

Step 11

Provide a rating based on your employee's results of this goal

Step 12

Add comments (required) on your employee's goal progress, including achievements and challenges.

Repeat steps 6-12 to complete the evaluation for your employee's remaining goals.

Illustration A

> History

Remove

Manager Summary

Rating Meaningful Results

13

Back

Next

Save for Later

Close

Illustration A

You can expand the History section to see the details of any changes made to that goal

If the goal is no longer valid or is a duplicate of another goal, click **Remove** to delete this goal from the employee's template. Employee must have 4-5 active goals or you will receive an error.

Step 13

The calculated rating for the Goals and Objectives section will be visible to you. Click **Next** to proceed to the next review section. You can also click **Save for Later** and the task will remain in your inbox until you are ready to take further action.

Better Today, Better Together, Better Tomorrow

MANAGER INSTRUCTIONS: 14

Please review the competencies and values statements below. Each competency has actions and behaviors that help define how our employees live out our values on a daily basis. You are required to select a proficiency rating and include a comment for each competency. Comments from the mid-year review will populate, so please ensure that you review and update as needed.

If the employee has been in current role less than 4 months and there has been insufficient time to evaluate a competency, you may select "Too New To Rate" as the rating for that competency. Any competency with this rating will be excluded from the overall calculated rating. You are still required to provide comments even if a behavior is too new to rate.

When you are satisfied with the Better Today, Better Together, Better Tomorrow section, you can click "Next" to proceed to the next review section. You can also click "Save for Later" and this task will remain in your inbox until you are ready to take further action.

Step 14

Please read the help text instructions titled **MANAGER INSTRUCTIONS** at the top of the Better Today, Better Together, Better Tomorrow section. This text will provide guidance on how to complete this section.

Competency	Description	Manager Evaluation	Employee Evaluation
1. Customer-Oriented 15	We provide outstanding value for our customers, teammates, families, communities, and world. We deliver leading-edge solutions to improve the lives of people in the communities we serve.	Proficiency Rating * 16 Comment * Required Manager Comment 17	Comment

Step 15

Review the Customer-Oriented competency and the associated values statements describing *The CoorsTek Way* which drives our behaviors and actions. If completed, review your employee's optional comment.

Step 16

Provide a proficiency rating based on your employee's actions and behaviors.

Step 17

Add comments (required) to describe your employee's demonstrated actions and behaviors related to the Customer-Oriented competency. Include strengths and opportunities.

Complete steps 15-17 for the remaining 4 CoorsTek Way competencies.

Manager Summary

Proficiency Rating Meaningful Results

18

Back

Next

Save for Later

Close

Step 18

The calculated rating for the Better Today, Better Together, Better Tomorrow section will be visible to you. Click **Next** to proceed to the next review section. You can also click **Save for Later** and the task will remain in your inbox until you are ready to take further action.

Overall

MANAGER INSTRUCTIONS: 19

The fundamental goal of performance management is to promote and improve employee effectiveness. Review your employee's overall rating, which is based on the average of the goals and competencies ratings that you assigned above. Please review your employee's overall comment and add your required comment about your employee's overall performance. Please note that the overall rating will be blank if you selected "Too New To Rate" for all of the employee's goals and competencies.

After adding your required comment, you can click "Next" to proceed to final review section. You will have the opportunity to review the employee's entire evaluation prior to submitting. You can also click "Save for Later" and this task will remain in your inbox until you are ready to take further action.

Step 19

Please read the help text instructions titled **MANAGER INSTRUCTIONS** at the top of the **Overall** section. This text will provide guidance on how to complete this section.

Manager Evaluation form showing the 'Overall' section. The 'Rating' is 'Solid Performer' and the 'Comment' field contains 'Required Manager Comment' with a '20' rating. The 'Next' button is highlighted with a red box and labeled '21'.

Step 20

Review your employee's required overall comment. Add your required comment about your employee's overall performance for the year.

Step 21

Click **Next** to proceed to the next review section. You can also click **Save for Later** and the task will remain in your inbox until you are ready to take further action.

Complete Manager Evaluation screen showing the 'Review and Submit' option highlighted with a red box and labeled '22'. The 'Submit' button is labeled '23'.

Step 22

All sections of the employee's evaluation are visible in the "review and submit" step. Review to ensure you are satisfied with your ratings and comments. If you want to make changes, you can select that section from your left menu and will be able to modify.

Step 23

Options:

- Click **Submit** to complete the process.
- Click **Save for Later** and the task will remain in your inbox until you are ready to take further action.
- Click **Send Back** if you want to send the evaluation template back to the employee to modify. Your completed ratings and comments will not be visible to the employee if you send back.

Success! Event submitted

Manager Evaluation: Annual Review 2020: Eric Employee [Actions](#)

Up Next

Approval by Manager's Manager

Once you have successfully submitted the manager evaluation, you will receive an on-screen message confirming your submission and showing the next step is *Approval by Manager's Manager*

After manager's manager approval, the review will route to the Calibration Owner and will be held through the calibration process.

PERFORMANCE DISCUSSION TASK

Inbox

Actions Archive

Viewing: All Sort By: Newest

Performance Discussion: Manager Evaluation: Annual Review 2020: Eric Employee **1**

10 second(s) ago - Effective 12/31/2020

Step 1
 After calibration is completed, you will receive a new Inbox task **Performance Discussion: Manager Evaluation: Annual Review**.
 Choose this Inbox task to continue.

Complete To Do
 Performance Discussion **2**
 10 second(s) ago - Effective 12/31/2020

For: Eric Employee

Overall Process: Annual Review 2020: Eric Employee

Overall Status: In Progress

Instructions: It is critical that you follow these steps in the order prescribed. Hold your performance discussion before hitting submit.
 Step 1. Please have a conversation with your employee about his/her performance. It is possible to provide a pdf version of the evaluation for discussion.
 Step 2. Click Submit.
 NOTE: Once you Submit, the employee will have access to the full review in Workday.

File Name	Type	File	Created by	Date and Time Created
3 Performance Review Printout 2018-11-28 23_55 CST.pdf	Business Form (PDF)	🔍		12/14/2020 01:02 PM

Step 2
 Follow the instructions in the To Do item and have a performance discussion with your employee. **DO NOT** hit submit until the conversation has been completed.

Step 3
 Click on the PDF file within the To Do item to open a printable version of the Annual Review.
 Print the Annual Review and provide a copy to your employee during your performance discussion

4

Submit Save for Later Close

Step 4
 Once the conversation with your employee is completed, click **Submit**.

You have marked as Complete
 Manager Evaluation: Annual Review 2020: Eric Employee **3**
 10 minute(s) ago - Effective 12/31/2020

Up Next
 Eric Employee
 Provide Employee Review Comments

You will receive a confirmation that the submission is successful and the next step in the process is the employee's acknowledgement and comments.

ACKNOWLEDGEMENT OF EMPLOYEE COMMENTS

Inbox

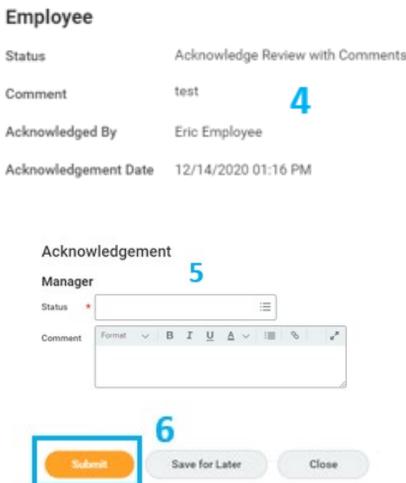
Actions Archive

Viewing: All Sort By: Newest

Review & Acknowledge Employee Comments: Eric Employee **1**

5 minute(s) ago - Effective 12/31/2020

Step 1
 If your employee added comments to the review acknowledgement step, the review will route back to you to ensure you see the comments.
 Open the inbox task titled *“Review & Acknowledge Employee Comments.”*

	<p>Step 2 Read the help text and click on Get Started</p>
	<p>Step 3 The summary step provides an overall view of the employee's review, including ratings, employee comments, and manager comments.</p>
	<p>Step 4 The acknowledgement step provides the employee's acknowledgement status and comments included. Please review these comments.</p> <p>Step 5 Select an acknowledgement status from the manager acknowledgement. Add optional comments. NOTE: if you add comments, the review will not route back to the employee.</p> <p>Step 6 Click on Submit.</p>

FAQs

Who can see the Annual Review? The Annual Review is visible by your employee, his/her management chain, and HR.

Where can I see the completed Annual Review? The Annual Review is visible to you in the Team Performance worklet and on your employee's Profile in the Performance Profile Group.

What if I need to edit the review after the performance discussion with my employee? Please contact your HR Business Partner for assistance.

Will I complete an Annual Review for an employee hired in the prior year? All employees hired on or before November 1 will need an Annual Review completed.