

LAUNCHING PERFORMANCE REVIEWS OFF-CYCLE

The performance management process provides managers and employees a framework for engaging in regular communication throughout the year about goals/expectations, performance, and employee development. The process should include dialogue rich with specific examples of expectations, actual performance, and impact during which both parties acknowledge and come to agreement on performance highlights that are then briefly summarized through documentation.

While performance review processes are traditionally launched in Workday by Human Resources in accordance with the established performance management cycle/calendar, managers have the ability to independently initiate off-cycle performance reviews throughout the year. This job aid provides a step-by-step guide for completing this process.

c. For **Check-In Conversation** manual launch: Click **Prompt** ☰ > **Check In > Check-In Conversation 2022-2023**

4. **Period Start Date:** Enter today's date (date may default depending on review type)
5. **Period End Date:** Enter today's date (date may default depending on review type)
6. Click **Submit.** 

Initiate Performance Review: Manager

The following steps are helpful in launching a performance review process manually in Workday. These steps apply to Kick-Off Goal/Expectation Setting, Check-In Conversations, and End-of-Year Conversation processes.

From the Workday **homepage**:

1. Enter **Start Performance Review** in the **Search** bar. Click the Enter key. Select **Start Performance Review for Employee.**

Enter the following:

2. **Employee:** type name of employee or click **Prompt** ☰ to select from **My Team**
3. **Review Template:**
 - a. For **End-of-Year** manual launch: Click **Prompt** ☰ **Summary Review > End of Year Review 2022-2023**
 - b. For **Goal/Expectation Setting** manual launch: Click **Prompt** ☰ > **Goal Setting > Kick-off Goals/Expectations and Development Activities 2022-2023**

