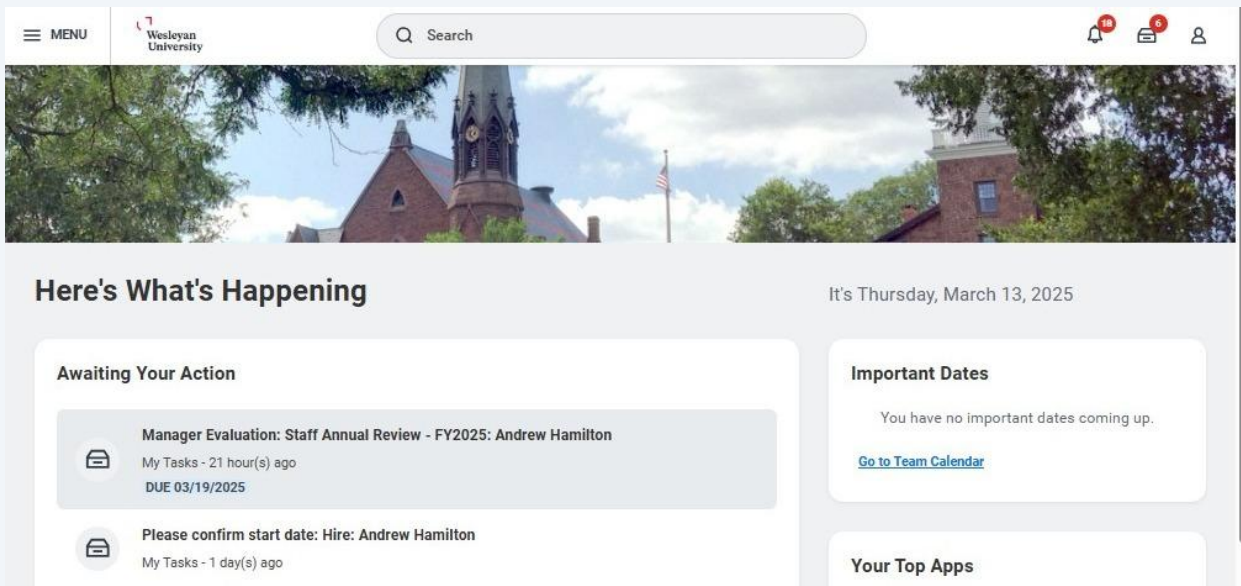


Annual Staff Performance Review - Supervisor Overview

Completing the Annual Review Form for a Direct Report

1 Navigate to Workday.



2 Click on the **Manager Evaluation** task in your inbox.

**This task will only appear once your direct report has submitted their self-evaluation form.*

Here's What's Happening

Awaiting Your Action



Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

My Tasks - 21 hour(s) ago

DUE 03/19/2025



Please confirm start date: Hire: Andrew Hamilton

My Tasks - 1 day(s) ago



Please confirm start date: Hire: Akila Amaratunga

My Tasks - 1 day(s) ago

3 Click **Get Started**.

**The questions in this section are a guide to help supervisors start the annual performance review conversation. Recorded answers to these questions are not required.*

Sandbox Preview - wesleyan_preview

On behalf of: Samantha Walsh

MENU

Wesleyan University

Item 1 of 6

Created: 03/12/2025 | Due: 03/19/2025 | Effective: 06/30/2025

Complete Manager Evaluation

Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

Review Period

07/01/2024 - 06/30/2025

The Annual Performance Review is an opportunity for you to provide your staff member with valuable feedback on their overall performance. It is also a time to check-in with your staff member about their experience working at Wesleyan.

Questions to guide the conversation with your staff:

- How has this year been for you?
- What was your best day? What was your worst day?
- Does the position still meet your expectations? If not, what are the areas or expectations that have changed?
- How can I support or help you in your role?
- What areas do you need additional training or guidance?

Your feedback is crucial for the staff member's ongoing performance and development.

4

Current Goals: Current goals entered in the goals area in the performance section on the staff member's profile will automatically roll into the annual review form. Staff and supervisors can update any section of the goal (i.e., goal, description, dates, status, milestones) on the review form.

Goals not listed in the goals area as of April 1 can be added to the review form.

Goals listed with an overall status of completed will not roll into the review form. Therefore, HR recommends staff leave their current FY goals as in progress and change the status to completed on the review form.

**Goal changes on the review form will be reflected in the goals area once the review form has been finalized.*

Employee Comments should be reviewed.

Supervisors can then add their own remarks in the Manager Comment section.

Union Staff: Union members do not enter goals so this section will not appear on a union member's review form.

Click **Next** to move to the next section.

The screenshot shows a web-based performance review form. On the left is a vertical navigation menu with the following items: 'Current Goals' (selected with a blue dot), 'Future Goals', 'Core Responsibilities and Contributions', 'Supervisor Accomplishments', 'Professional Development', 'Areas of Concern', 'Supporting Documents', 'Overall Performance', and 'Review and Submit'. The main content area is divided into sections. At the top, there's a table with columns for goal description, dates, and status. Below this, the 'Manager' section has a 'Comment' field with a rich text editor containing the text: 'Andrew has successfully improved the efficiency of HR reporting with this monthly report. Colleagues have commented on Andrew's willingness to learn, communication and flexibility.' Below the Manager section is the 'Employee' section, also with a 'Comment' field containing the text: 'This was an amazing experience! I learned so much from my colleagues. The monthly report has been created and maintained over the past few months. Colleagues have commented how helpful this report has been to them and their work. I've also received positive feedback from HR leadership on the accuracy'. Below the Employee section is a link for '> History'. At the bottom of the form, there are four buttons: 'Back', 'Next' (highlighted with a yellow circle), 'Save', and a three-dot menu button.

5

Future Goals: Staff and supervisors can add goals and goal details for the upcoming fiscal year.

**Goals added on the review form will be reflected in the staff member's goals area once the review form has been finalized.*

If goals have not been identified, you can skip this section.

Click **Next** to continue to the next section.

Future Goals

Goal: Normal

Recommend ways to improve reporting requests.

Description: Normal

Due Date: 12/31/2025

Category:

Status: Not Started

Track By: select one

Milestones

0 items

*Milestone	Due Date	Status
No Data		

Back Next Save ...

6

Core Responsibilities and Contributions: Supervisors must provide comments on how the staff member met their core responsibilities this year and ways they contributed to the success of the department, division, and/or university.

**Core Responsibilities are no longer listed in the staff member's profile. To review core responsibilities, supervisors can review staff job description through WesPortal under Manager's Toolbox.*

Employee Comments should be reviewed.

Supervisors can then add their own remarks in the Manager Comment section.

Click **Next** to move to the next section.

Complete Manager Evaluation

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025

Current Goals

Future Goals

Core Responsibilities and Contributions

Supervisor Accomplishments

Professional Development

Areas of Concern

Supporting Documents

Overall Performance

Review and Submit

Question

Core Responsibilities: What are specific examples of how the staff member met their core responsibilities and the expectations of their position?

Manager

Answer *

Normal

B I U A

Consistently ensures that HR data is organized and accurate, showing a strong commitment to detail. While there have been occasional discrepancies, the overall quality of data management has been exceptional and has improved over the evaluation period.

Employee

Answer

This year, I have consistently met and, in some cases, exceeded my responsibilities in my role. I focused on maintaining the integrity and accuracy of the data, ensuring that all systems were updated in a timely manner and that I provided accurate and actionable reports to the HR team. One of my key accomplishments was enhancing the efficiency of data processes by identifying areas for improvement and automating several routine tasks, which led to a noticeable reduction in manual work. This optimization not only improved our workflow but also contributed to faster report generation and more accurate insights for HR decision-making.

Question

Contributions: What are examples of ways the staff member contributed to the success and mission of the department, cabinet area, and/or university?

Manager

Answer *

Normal

B I U A

Wonderful to see Andrew meeting new people and getting involved in other areas on campus.

Employee

Answer

This year, I participated in SAGES, Wesleyan's Campus Sustainability Committee.

Back

Next

Save

...

7

Supervisor Accomplishments: If the staff member supervises others, supervisors can provide comments on the staff member's leadership contributions.

If the staff member is not a supervisor, click **Next** to skip this section.

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025

○ Current Goals

○ Future Goals

○ Core Responsibilities and Contributions

○ Supervisor Accomplishments

○ Professional Development

○ Areas of Concern

○ Supporting Documents

○ Overall Performance

○ Review and Submit

Supervisor Accomplishments

Question

What are examples that demonstrate the supervisor's leadership skills and how they contributed to the success of their direct report(s)? If the staff member is not a supervisor, please skip this section.

Manager

Answer

Normal

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A ▼

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🔍

Employee

Answer

Back

Next

Save

...

Professional Development: Supervisors must provide comments on how the staff member developed their job-related skills and knowledge this year and where they would like the staff member to develop further next year. Strategies and ways to support this development must be outlined.

...

9

Areas of Concern: If areas of improvement were discussed with the staff member over the past year, supervisors should document these concerns in the areas of concerns section. Supervisors should summarize the improvement areas, what strategies have been used to address the concern, and areas that need to continue to be worked on in the upcoming year.

If the staff member did not have any concerns, supervisors can skip this section.

Click **Next** to go to the next section.

The screenshot shows a web-based form for a 'Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton'. The left sidebar contains a navigation menu with the following items: Current Goals, Future Goals, Core Responsibilities and Contributions, Supervisor Accomplishments, Professional Development, **Areas of Concern** (highlighted with a blue bar and a blue circle), Supporting Documents, Overall Performance, and Review and Submit. The main content area is titled 'Areas of Concern' and contains a 'Question' section with the text: 'Has the staff member had any areas of concern addressed during the past year? If yes, please briefly summarize the steps that were taken to address the area(s) of concern and any areas that need to continue to be reviewed in the upcoming year. If not applicable, please skip this section.' Below this is a 'Manager' section with an 'Answer' field. The answer field has a rich text editor toolbar with options for Normal, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, and Link. The text entered in the answer field is: 'Occasional data input discrepancies have occurred, which have affected reporting. However, we've discussed strategies and auditing procedures to ensure mistakes no longer occur. We will continue to work on this area over the next year to see how we can refine this process further'. At the bottom of the form, there are three buttons: 'Back', 'Next' (highlighted with a yellow circle), and 'Close'.

Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

Actions

07/01/2024 - 06/30/2025
Evaluated By: Lauren Stumpf

Current Goals

Future Goals

Core Responsibilities and Contributions

Supervisor Accomplishments

Professional Development

Areas of Concern

Supporting Documents

Overall Performance

Review and Submit

Areas of Concern

Question Has the staff member had any areas of concern addressed during the past year? If yes, please briefly summarize the steps that were taken to address the area(s) of concern and any areas that need to continue to be reviewed in the upcoming year. If not applicable, please skip this section.

Manager

Answer

Normal B I U A | : = | Link

Occasional data input discrepancies have occurred, which have affected reporting. However, we've discussed strategies and auditing procedures to ensure mistakes no longer occur. We will continue to work on this area over the next year to see how we can refine this process further

Back Next Close

10 **Supporting Documents:** Supervisors can add documents to the review form.

Supervisors can also view documents the staff member has uploaded.

If this section is not applicable, supervisors can skip this section.

Click **Next** to go to the next section.

The screenshot shows a web interface for a 'Complete Manager Evaluation'. On the left is a sidebar with a list of sections: Current Goals, Future Goals, Core Responsibilities and Contributions, Supervisor Accomplishments, Professional Development, Areas of Concern, Supporting Documents (highlighted with a blue bar and a selected radio button), Overall Performance, and Review and Submit. The main content area is titled 'Supporting Documents' and 'Manager'. It features a large dashed rectangular box for file uploads, containing the text 'Drop files here' and a small 'or' label. Below the box is a 'Select files' button. At the bottom of the interface is a navigation bar with four buttons: 'Back', 'Next' (which is highlighted with a yellow circle), 'Save' (with a floppy disk icon), and a three-dot menu button.

11

Overall Performance: Supervisors must provide comments on the staff member's overall performance over the past year.

Click **Next** to review and submit.

Complete Manager Evaluation

Manager Evaluation: Staff
Annual Review - FY2025:
Andrew Hamilton

Actions

07/01/2024 - 06/30/2025

Current Goals

Future Goals

Core Responsibilities and Contributions

Supervisor Accomplishments

Professional Development

Areas of Concern

Supporting Documents

Overall Performance

Review and Submit

Overall Performance

Describe the staff member's overall performance.

Manager

Comment *

Normal

B

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U

A

:

:

Andrew has consistently met expectations and contributed significantly to the success of the team. His commitment to accuracy, efficiency, and collaboration makes him an invaluable asset to the department, and I am confident they will continue to excel and grow in their role.

Back

Next

Save

12

Review & Submit: Supervisors should review the information they provided in the review form.

Send Back will send the self-evaluation form back to the staff member to edit comments. If supervisor comments were already entered, the staff member will not be able to see those comments when the form is sent back for edits. The comments will also not be lost when the staff member resubmits the self-evaluation form.

Save for Later until the review form is ready to be submitted.

Submit review to the staff member for review and final comments.

**Once this form is submitted to the staff member, comments cannot be edited. HR recommends supervisors save and create a PDF of the review to give to the staff member for the performance review conversation. Once the conversation takes place and changes are made (if needed), the supervisor can submit the form to the staff member for review and final comment.*

If changes are need after submittal, the supervisor must contact HR to correct the form.

The screenshot displays the 'Review and Submit' step of the Annual Review Form. On the left, a vertical navigation menu lists the following steps: Supervisor Accomplishments, Professional Development, Areas of Concern, Supporting Documents, Overall Performance, and Review and Submit. The 'Review and Submit' step is currently selected and highlighted with a blue bar. The main content area is divided into two sections: 'Supporting Documents' and 'Overall Performance'. The 'Overall Performance' section includes a 'Manager' field and a 'Comment' field. The comment text reads: 'Andrew has consistently met expectations and contributed significantly to the success of the team. His commitment, accuracy, efficiency, and collaboration makes him a valuable contributor to the department, and I am confident that he will continue to excel and grow in their role.' At the bottom of the form, there are three buttons: 'Submit' (highlighted with a blue border and an orange arrow pointing to it), 'Send Back' (with an orange arrow pointing to it), and 'Save for Later' (with an orange arrow pointing to it).

Acknowledging & Finalizing the Annual Review Form

13

Once the staff member has reviewed and acknowledged the annual review form, a task will be sent to the supervisor's inbox for their review, acknowledgement, and final comments.



Good Afternoon, On Behalf of: Samantha Walsh

It's Thursday, March 13, 2025

Awaiting Your Action



Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

My Tasks - 15 second(s) ago

DUE 03/15/2025



Please confirm start date: Hire: Andrew Hamilton

My Tasks - 1 day(s) ago



Please confirm start date: Hire: Akila Amaratunga

My Tasks - 2 day(s) ago

[Go to My Tasks \(6\)](#)

Important Dates

You have no important dates co

[Go to Team Calendar](#)

Your Top Apps



Recruiting Dashboard



Benefits and Pay



Expenses Hub

14

Click **Get Started**.

On behalf of: Samantha Walsh

Wesleyan University

Search

Item 1 of 6

Created: 03/13/2025 | Due: 03/15/2025 | Effective: 06/30/2025

Provide Manager Review Comments Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

Evaluated By Lauren Stumpf

Review Period 07/01/2024 - 06/30/2025

Get Started

15 Review the annual review form and staff comments, if applicable.

Click **Next** to go to the next section.

Manager

Comment: Andrew has consistently met expectations and contributed significantly to the success of the team. His commitment to accuracy, efficiency, and collaboration makes him a valuable contributor to the department, and I am confident they will continue to excel and grow in their role.

Acknowledgement

Manager

Status: (empty)

Comment:

Employee

Status: Acknowledge Review

Comment: I've enjoyed the work this year and look forward to next year.

Acknowledged By: Andrew Hamilton

Acknowledgement Date: 03/13/2025 04:17 PM

Buttons: Back, Next, Close

16 Click status field to **Acknowledge Review** and add final comments to the comments field.

Sandbox Preview - wesleyan_preview

On behalf of: Samantha Walsh

MENU Wesleyan University Search

Provide Manager Review Comments

Manager Evaluation: Staff Annual Review - FY2025: Andrew Hamilton

Actions

07/01/2024 - 06/30/2025
Evaluated By: Lauren Stumpf

Summary Acknowledgement

Acknowledgement

Manager

Status: * Search
Acknowledge Review

Comment:

Employee

Status: Acknowledge

Comment: I've enjoyed the work this year and look forward to next year.

Acknowledged By: Andrew Hamilton

Acknowledgement Date: 03/13/2025 04:17 PM

17 Click **Submit** to finalize the review.

Thank you for a great year!

Acknowledged By Andrew Hamilton

Acknowledgement Date 03/13/2025 04:17 PM

View Comments (1)

Lauren Stumpf
test 1 hour ago

Process History

- Samantha Walsh Due 03/19/2025
Complete Manager Evaluation for Performance Review- Submitted
- Review Complete Manager Evaluation- Not Required
- Service: Await Calibration Completion- Not Required
- Update Performance Review Ratings for Manager Evaluation- Not Required
- Lauren Stumpf 1 hour ago
says, "test"
Complete Manager Evaluation for Performance Review- Corrected
- Andrew Hamilton Due 03/15/2025
Provide Employee Review Comments- Submitted
- Samantha Walsh Due 03/15/2025
Provide Manager Review Comments- Awaiting Action

Submit Save for Later

Creating a PDF

18 Click **View** next to the review you wish to create a PDF for.

Sandbox Preview - wesleyan_preview

In behalf of: Samantha Walsh

MENU Wesleyan University

Q Search

Goals Performance Reviews Development Items Reviews

In Progress 1 item


Review	Contains Hidden Sections	Review Period Start Date	Review Period End Date	Status	Awaiting	Due Date	View Review	Create Review PDF
Staff Annual Review - FY2025: Andrew Hamilton	Yes	07/01/2024	06/30/2025	Complete Manager Evaluation for Performance Review	Samantha Walsh	03/19/2025	View	Create New PDF

19 Click on the PDF link once the document has generated.

Q Search

GoalsPerformance ReviewsDevelopment ItemsReviews

In Progress 1 item

Review	Contains Hidden Sections	Review Period Start Date	Review Period End Date	Status	Awaiting	Due Date	Review PDF	View Review	Create
Staff Annual Review - FY2025: Andrew Hamilton	Yes	07/01/2024	06/30/2025	Complete Manager Evaluation for Performance Review	Samantha Walsh	03/19/2025	 Hamilton, Andrew Staff Annual Review - FY2025 03_13_2025.pdf	View	C