VIEW PAST EMPLOYEE PERFORMANCE REVIEWS

Past (and current) performance review documentation related to Goal/Expectation Setting, Check-In Conversations, and End-of-Year Conversations is maintained in Workday for your reference and can be viewed at any time. ***Note:*** *Performance reviews completed prior to the implementation of Workday on April 1, 2019 are currently not available in the Workday system. Please contact Human Resources for access to reviews completed prior to the date listed above.*

View Employee Performance Reviews

From the Workday **homepage**:

1. Click **View All Apps**.

2. Click the **Team Performance** application.

3. Click **Employee Reviews** from the **Actions** menu.
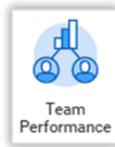
Enter the following:

4. **Organizations**: Click **Prompt** ☰ to select **My Organizations**.

5. **Include Subordinate Organizations**: Click the checkbox if desired. This will enable you to view completed review processes for non-direct reports within your organization.
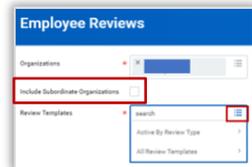
   Note: You will not be able to view review content for employees not listed in your supervisory organization, only completed processes.

6. **Review Templates**: Click **Prompt** ☰ to list the review types.

   a. To view <u>multiple</u> review templates: Click **All Review Templates** and click the checkbox(es) to select the desired templates to view

   b. To view a <u>single</u> type of performance review: Click **Active By Review Type**

   i. Select the review template category:
      - **Corrective Action**
      - **Performance Improvement Plan**
      - **Performance Review**
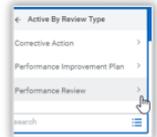
   ii. Select the review type:
      - **Check In:** Documentation from Check-In Conversations
      - **Goal Setting:** Documentation from the Goal/Expectation Setting process
      - **Summary Review:** Documentation from the End-of-Year Conversation
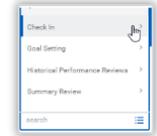
   iii. Click the checkbox to select the review type
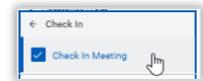
7. Click **OK** [OK] to generate the list.

8. The **Employee Reviews** list has two tabs: **In Progress** and **Completed**. The **Review** column lists the **Review Names** as **Review Type: Employee Name.**

   To display the status of the review click the desired **Review Name**. The **View Event** report tabs list the status of each **Process** step.
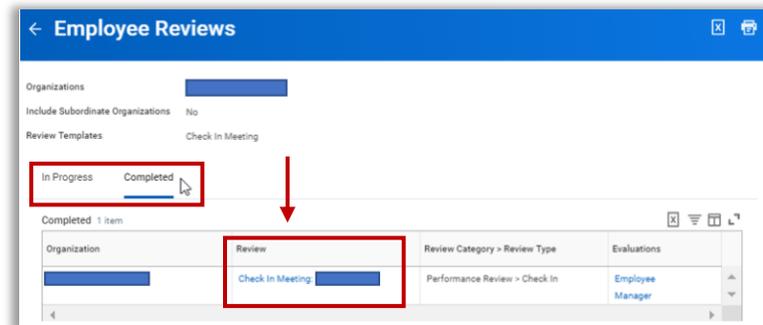
9. To display a printable view of the review from the **Employee Reviews** screen:

   a. Hover to the right of the review name and click **Related Actions** ⬤⬤⬤

   b. Click **Talent**

c.   Click **View Printable Employee Review**

The **Printable Employee Review** can be printed by clicking the printer icon at the top of the page.

View Team Performance Review Summary

Review a summary of your team members' performance review statuses, with the ability to view the review and its process details.

From the Workday **homepage**:

1.   Click **View My Apps**.

2.   Click the **Team Performance** application

3.   Select **My Team's Performance Reviews** from the **Actions** menu. Reviews are separated by **In Progress** and **Complete**. Click the arrow ▷ to expand the list of reviews by status.
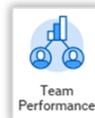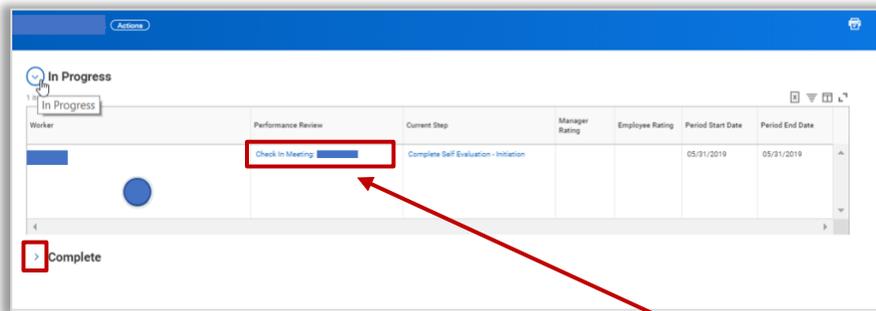
4.   To display the process history of the review, click the review name.

5.   To display a printable view of the review:

a.   Hover to the right of the review name and click **Related Actions** ⋯

b.   Click **Talent**

c.   Click **View Printable Employee Review**

The **Printable Employee Review** can be printed by clicking the printer icon at the top of the page.