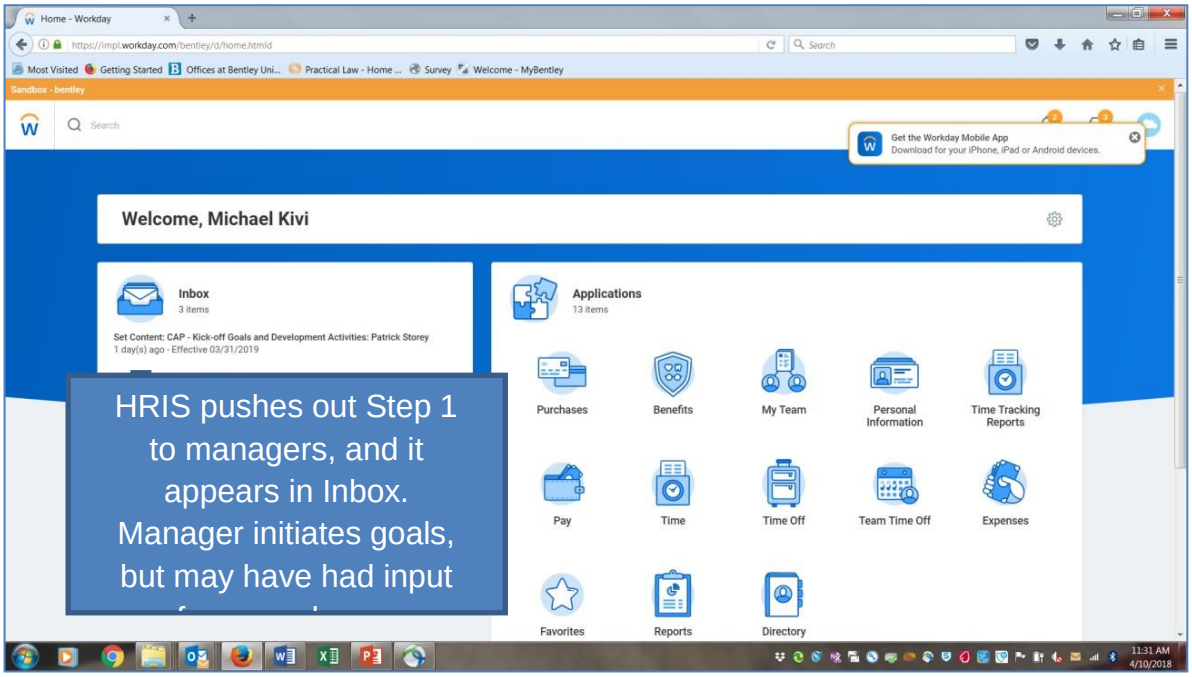
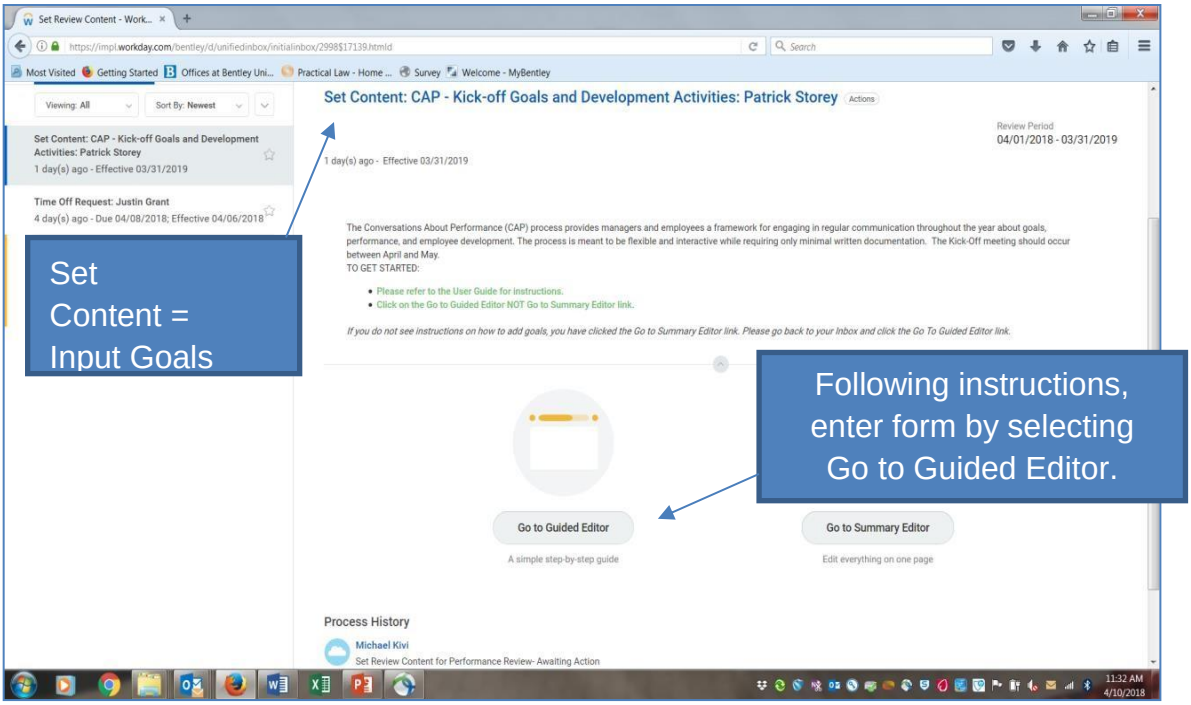
Workday - User Guide to Performance Management (CAP)

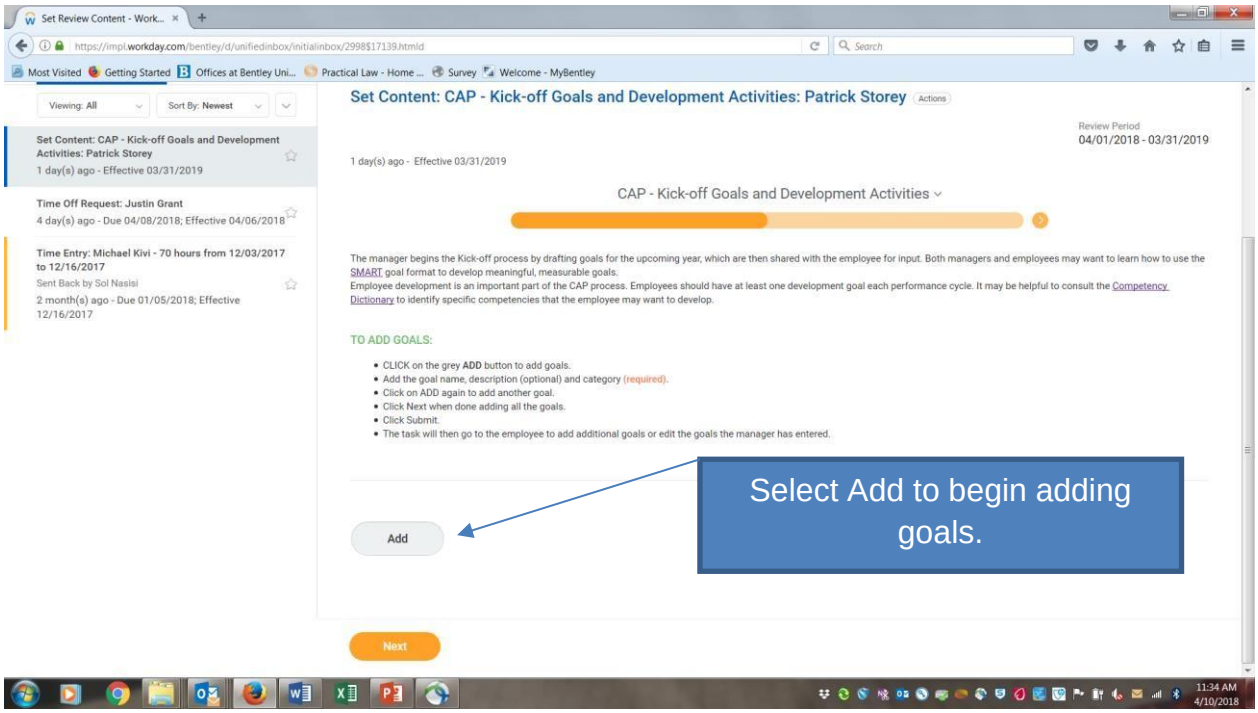
The following step-by-step guide is designed to walk employees and managers through the Performance Management process (CAP) in Workday. Part 1 refers to the Goal-setting process. Part 2 refers to the Check-In meeting process. Part 3 refers to the CAP Wrap-Up Summary. Users needing assistance at any point in the process should contact their Human Resources Business Partner.

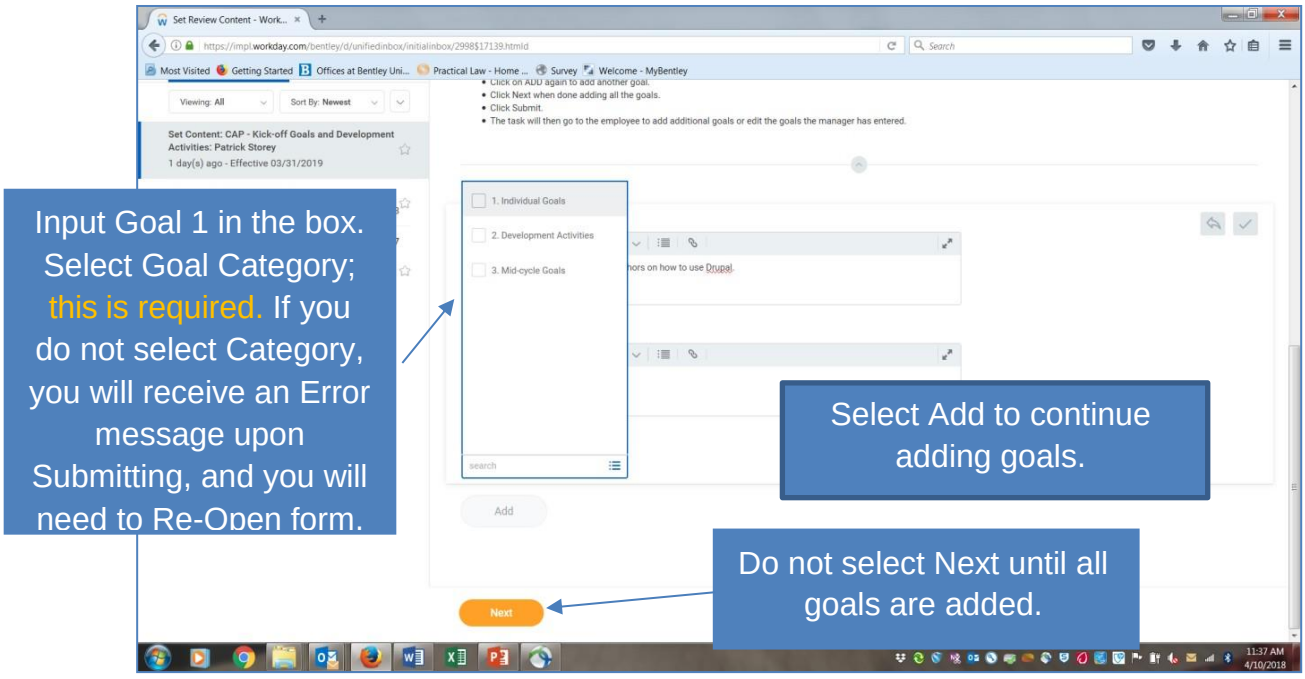
PART 1 - GOAL SETTING PROCESS



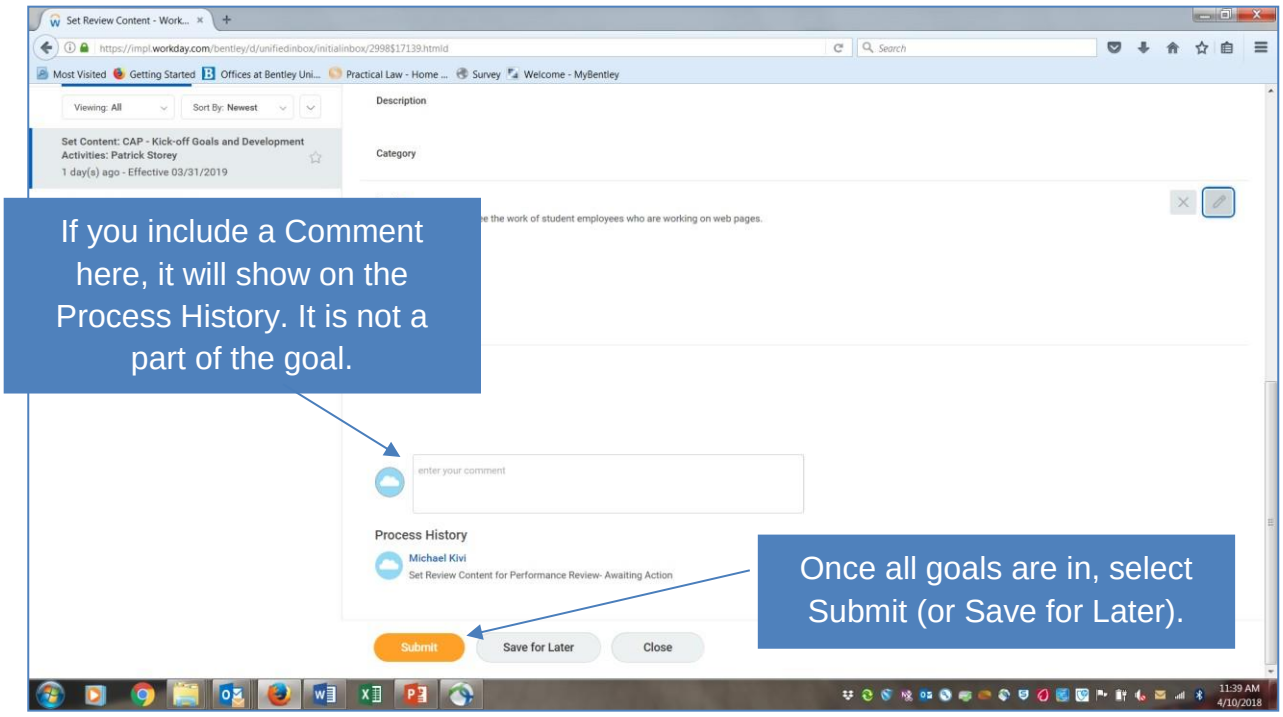


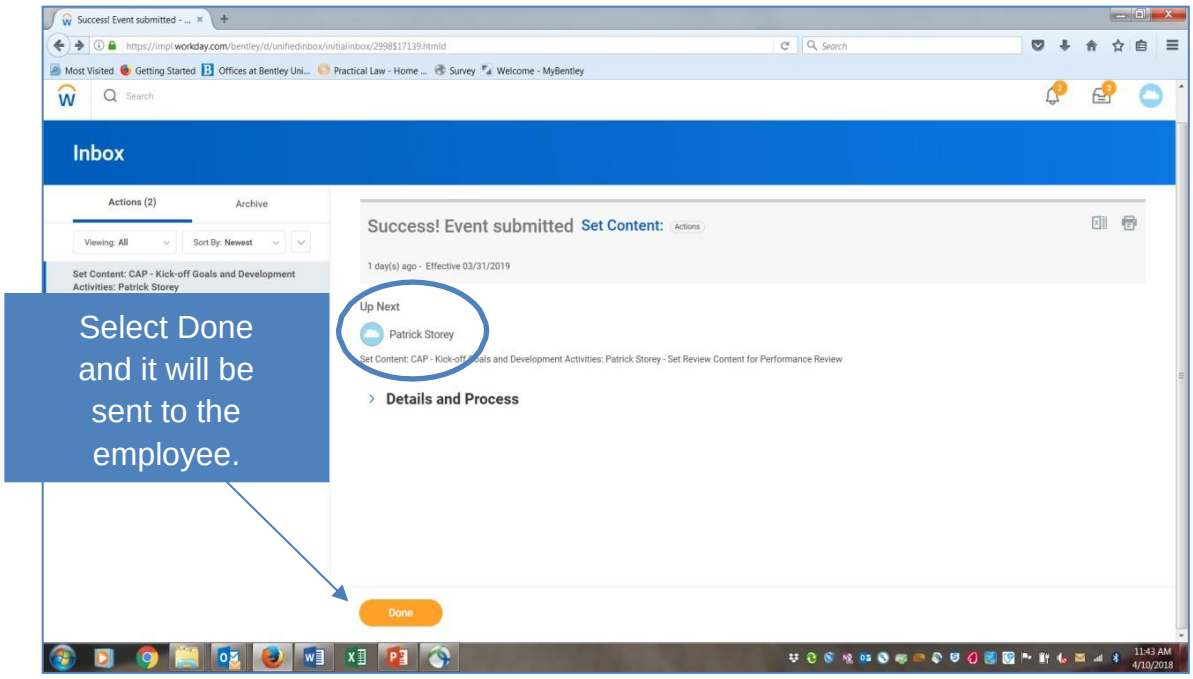
MANAGER'S SCREEN

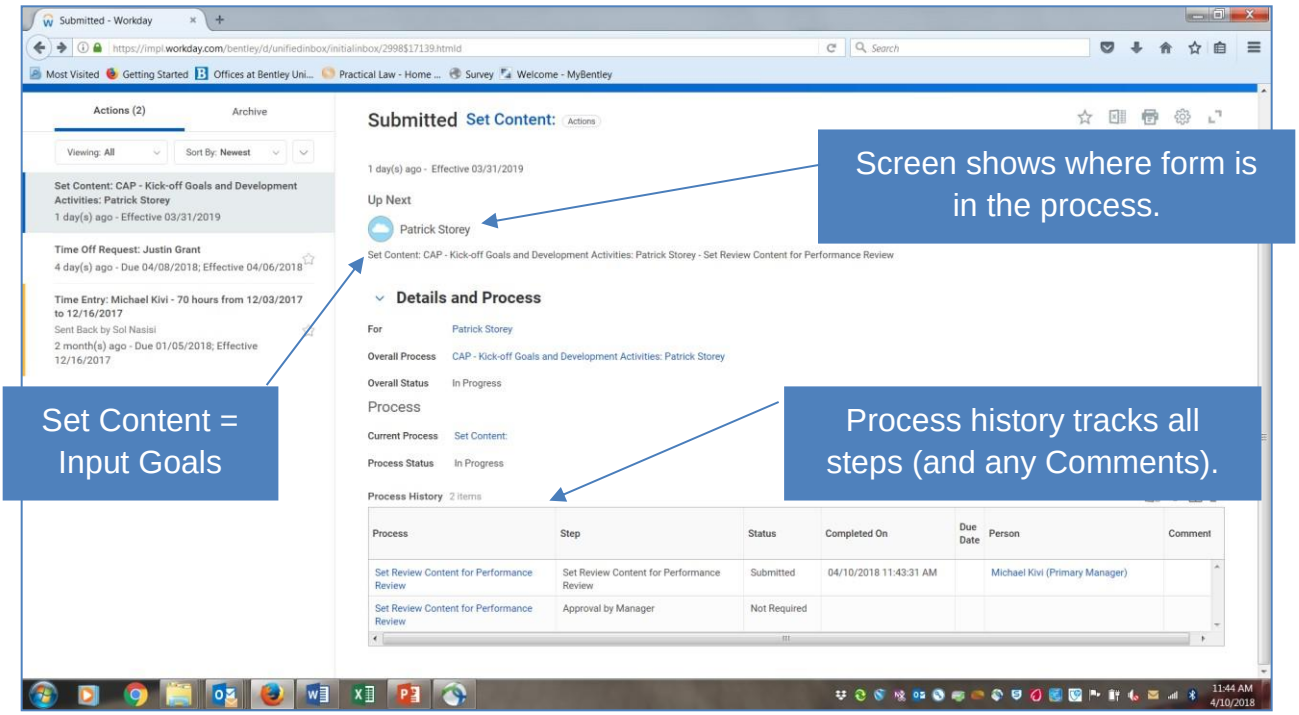




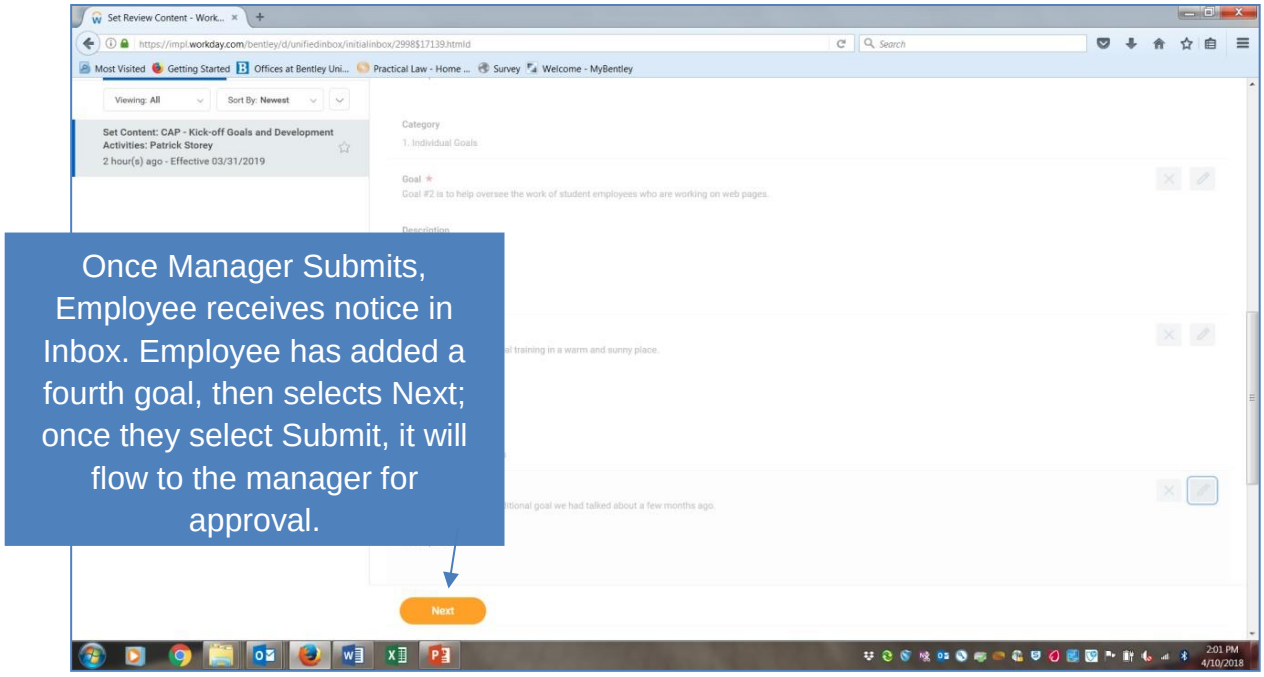
MANAGER'S SCREEN CONT.



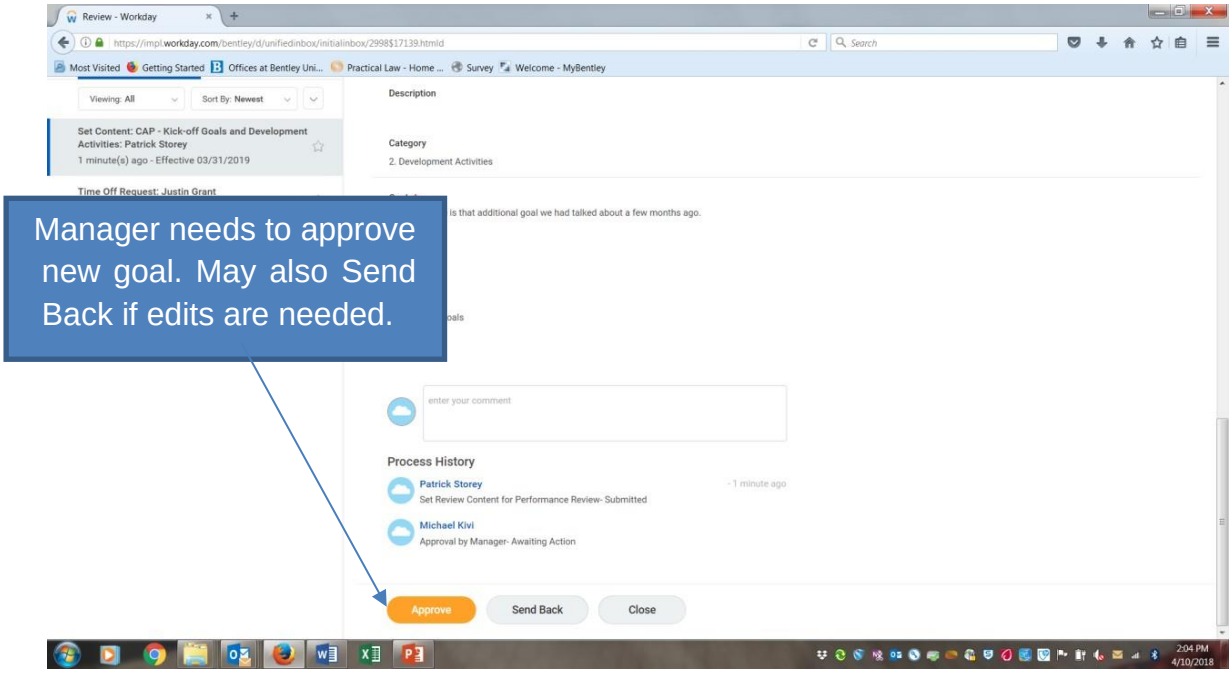




EMPLOYEE'S SCREEN



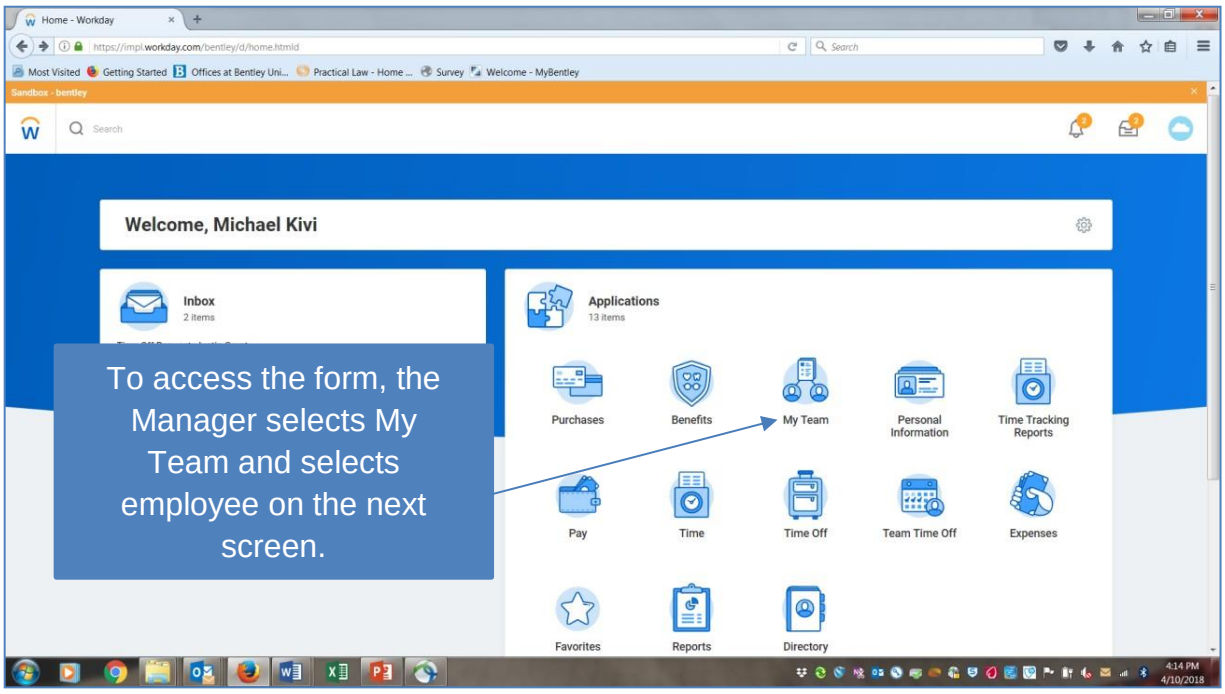
MANAGER'S SCREEN



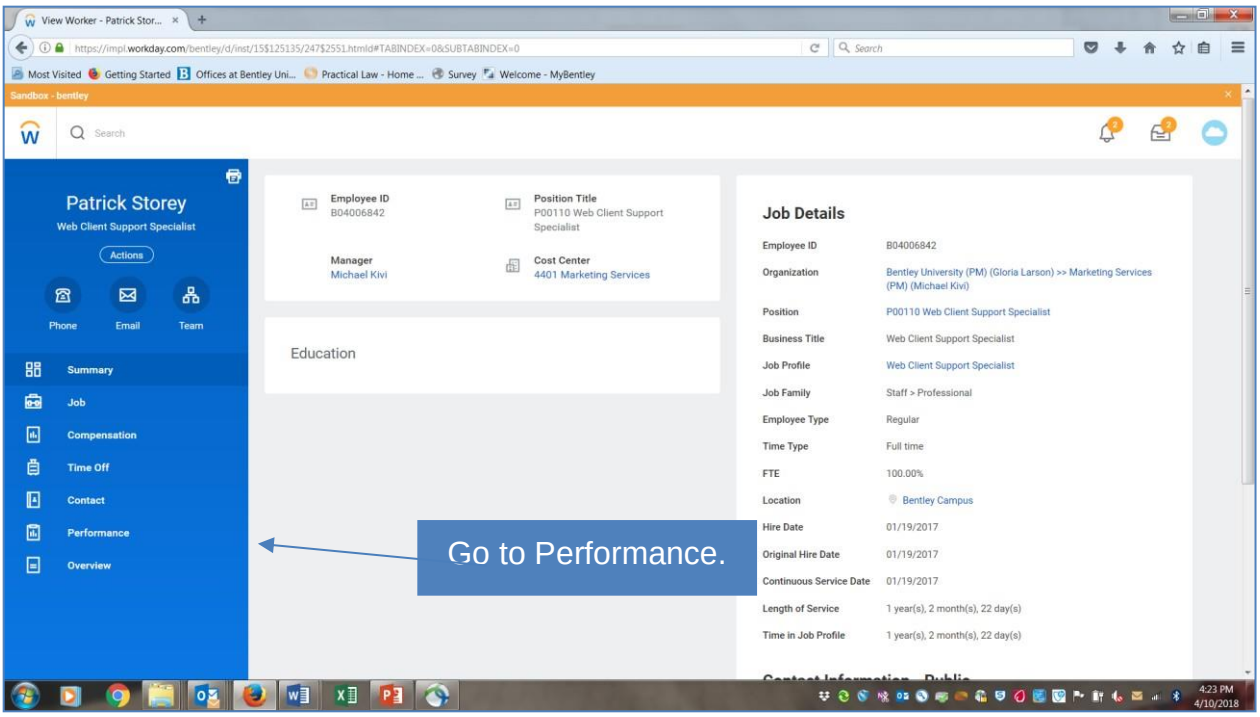
Goals are now entered; they can be viewed or edited throughout the cycle. If a new employee starts after the Goals cycle has closed, the manager should follow the process below to get to the Performance page for that employee, and add the goals at that time.

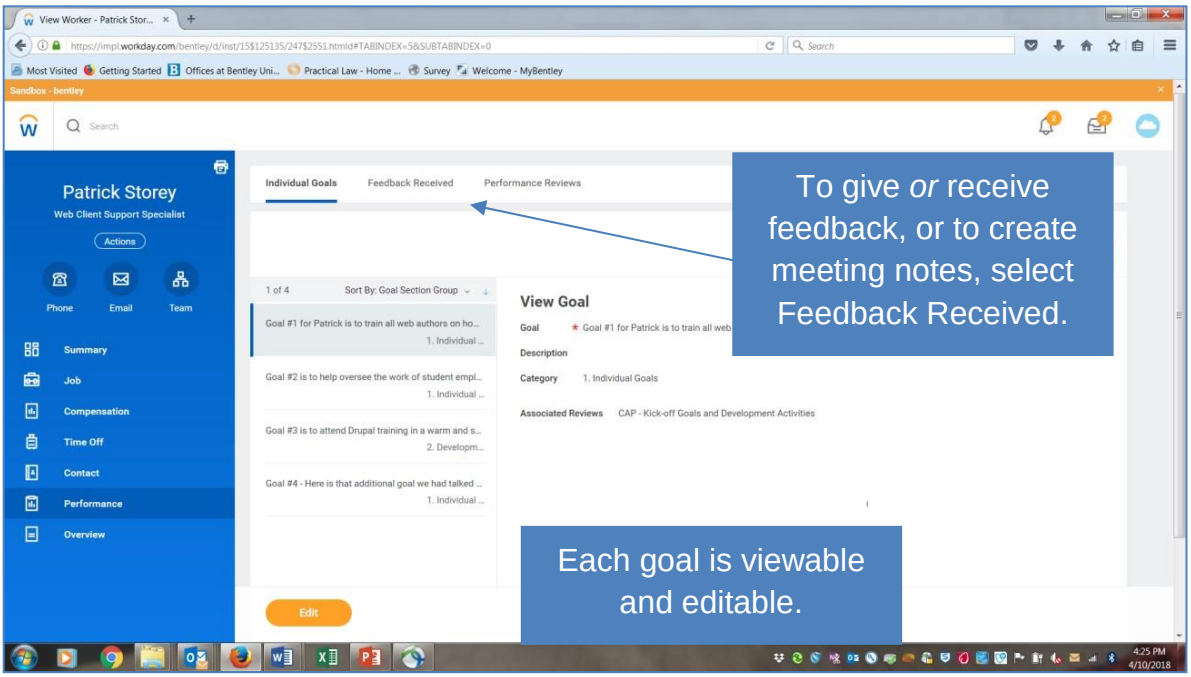
PART 2 - GIVING AND GETTING FEEDBACK, AND CHECK-IN MEETINGS

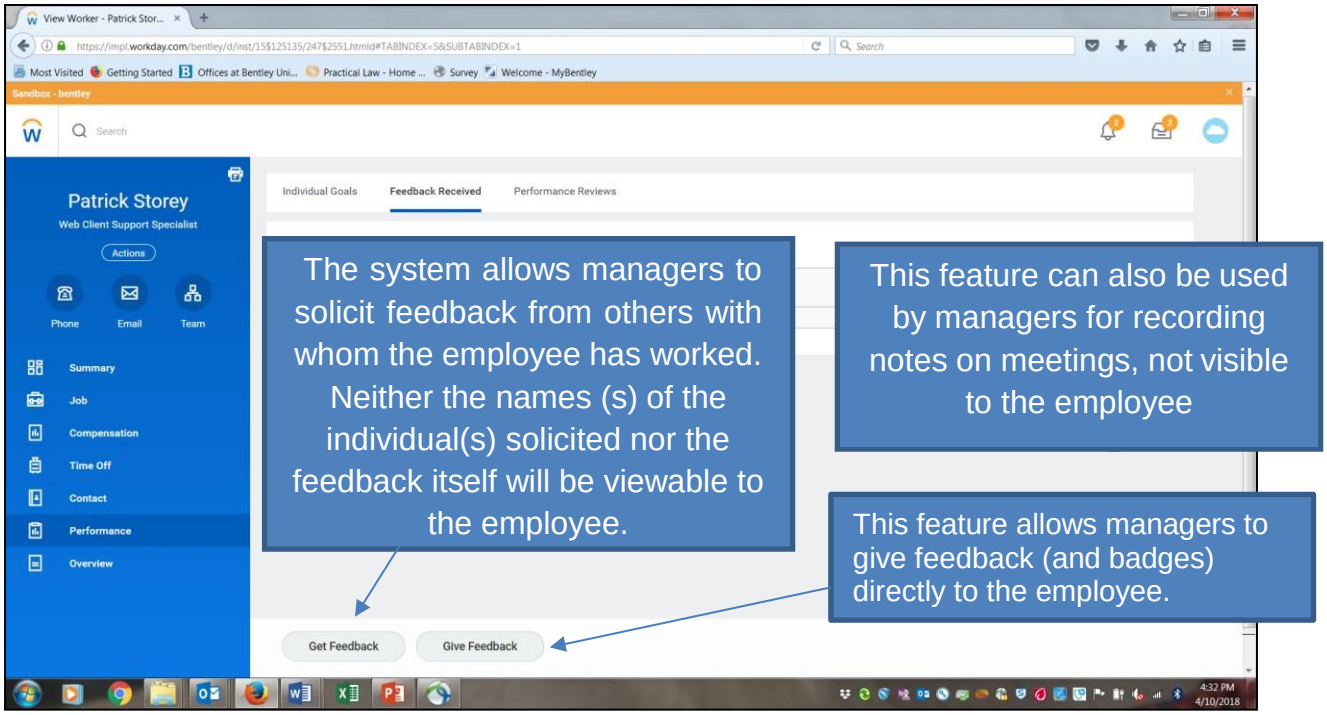
The next section shows how a manager can give the employee feedback, receive it about the employee from others, or add personal comments about meetings that occur between the two formal Check-in meetings. The two formal Check-in meetings are pushed out to users by HR Operations twice a year.



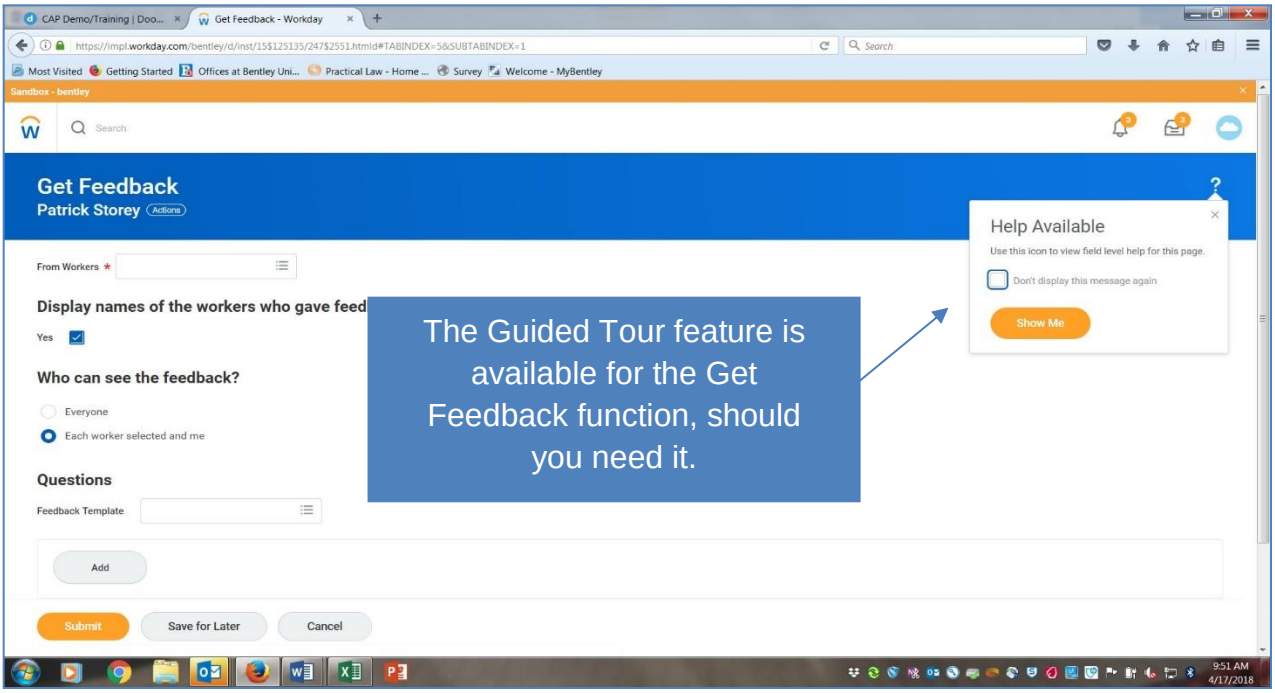
MANAGER'S SCREEN, CONT.



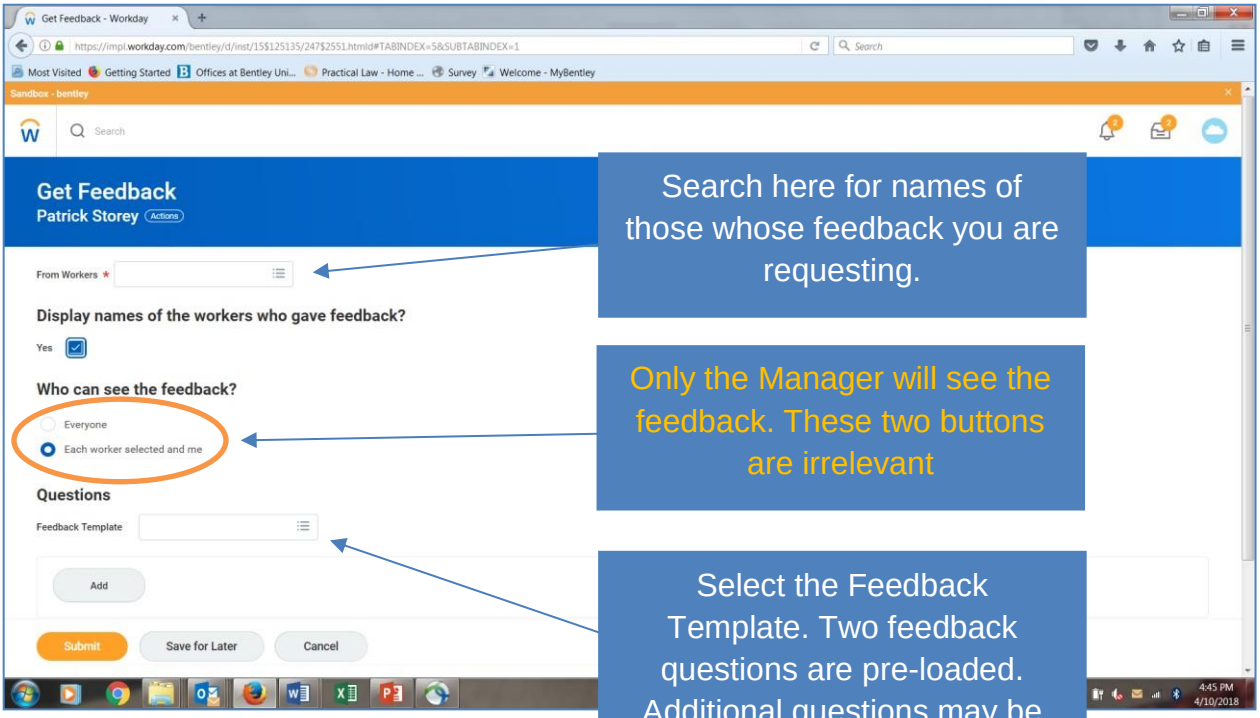




MANAGER SOLICITS FEEDBACK FROM OTHERS



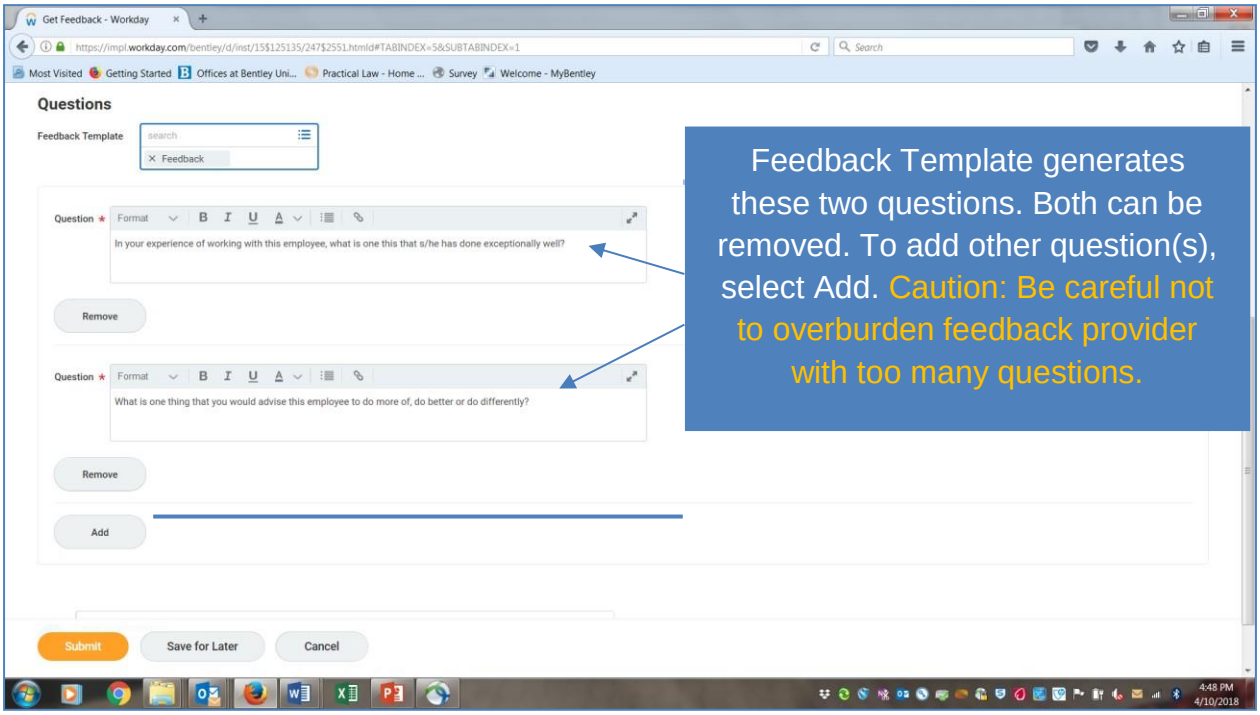
MANAGER SOLICITS FEEDBACK FROM OTHERS, CONT.



Search here for names of those whose feedback you are requesting.

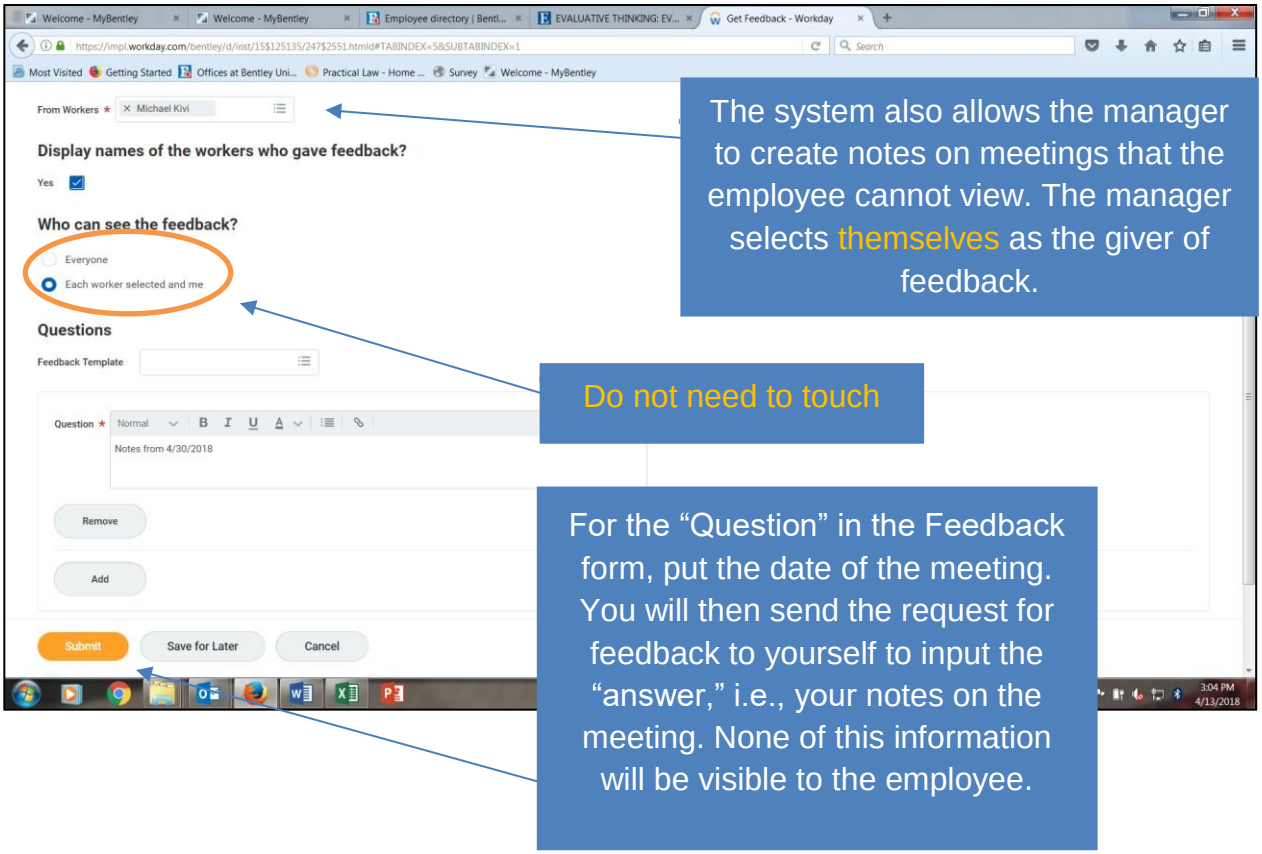
Only the Manager will see the feedback. These two buttons are irrelevant

Select the Feedback Template. Two feedback questions are pre-loaded. Additional questions may be input.



Feedback Template generates these two questions. Both can be removed. To add other question(s), select Add. Caution: Be careful not to overburden feedback provider with too many questions.

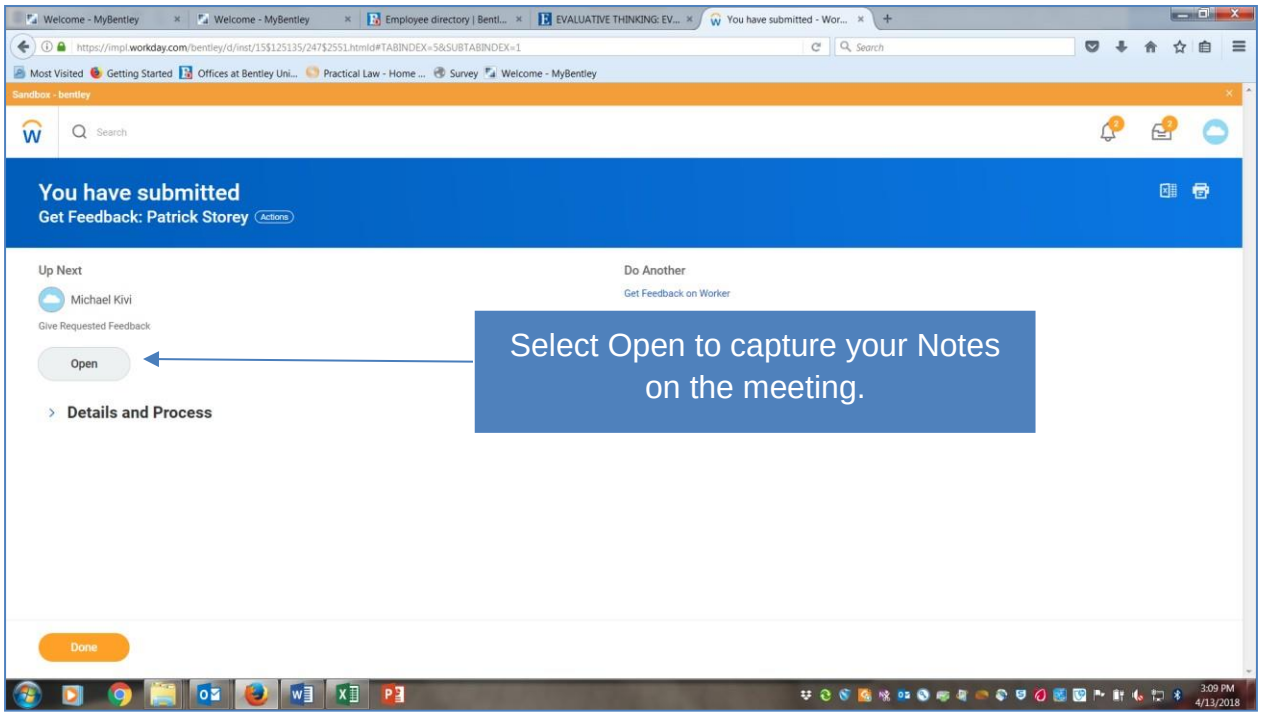
MANAGER CREATES PERSONAL MEETING NOTES NOT VISIBLE TO EMPLOYEE

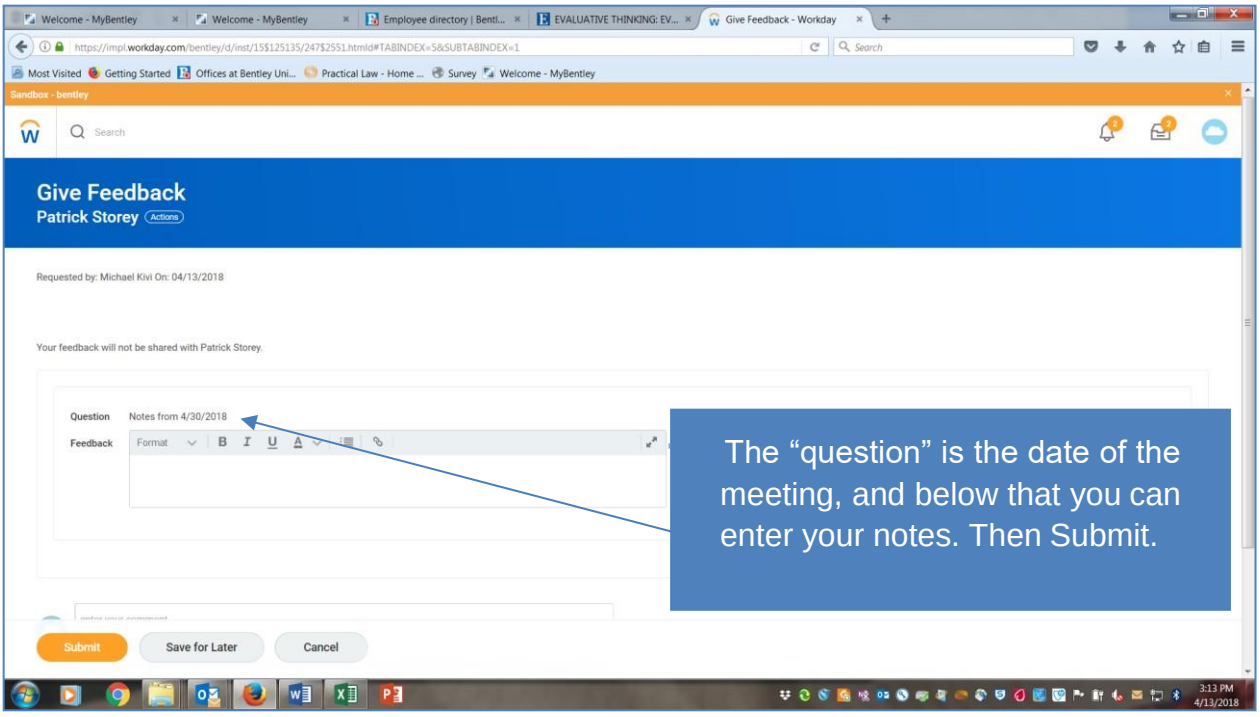


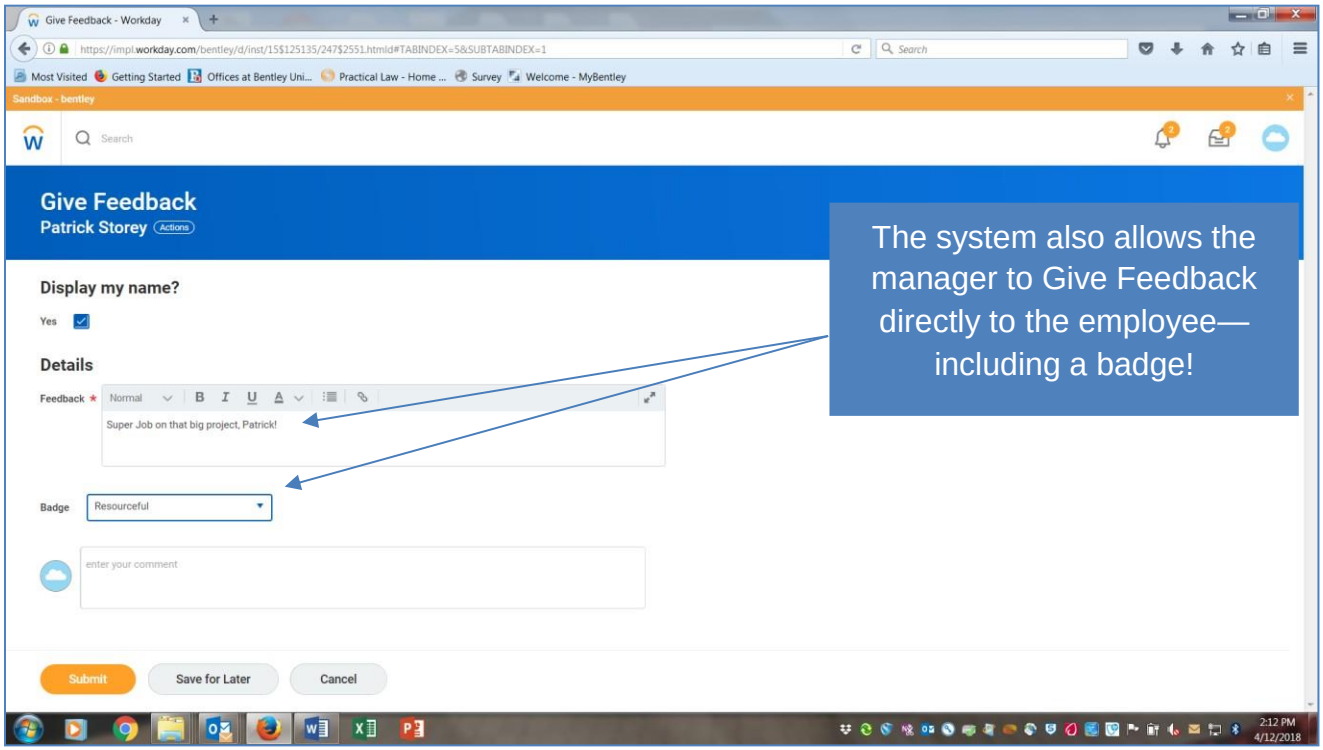
The system also allows the manager to create notes on meetings that the employee cannot view. The manager selects themselves as the giver of feedback.

Do not need to touch

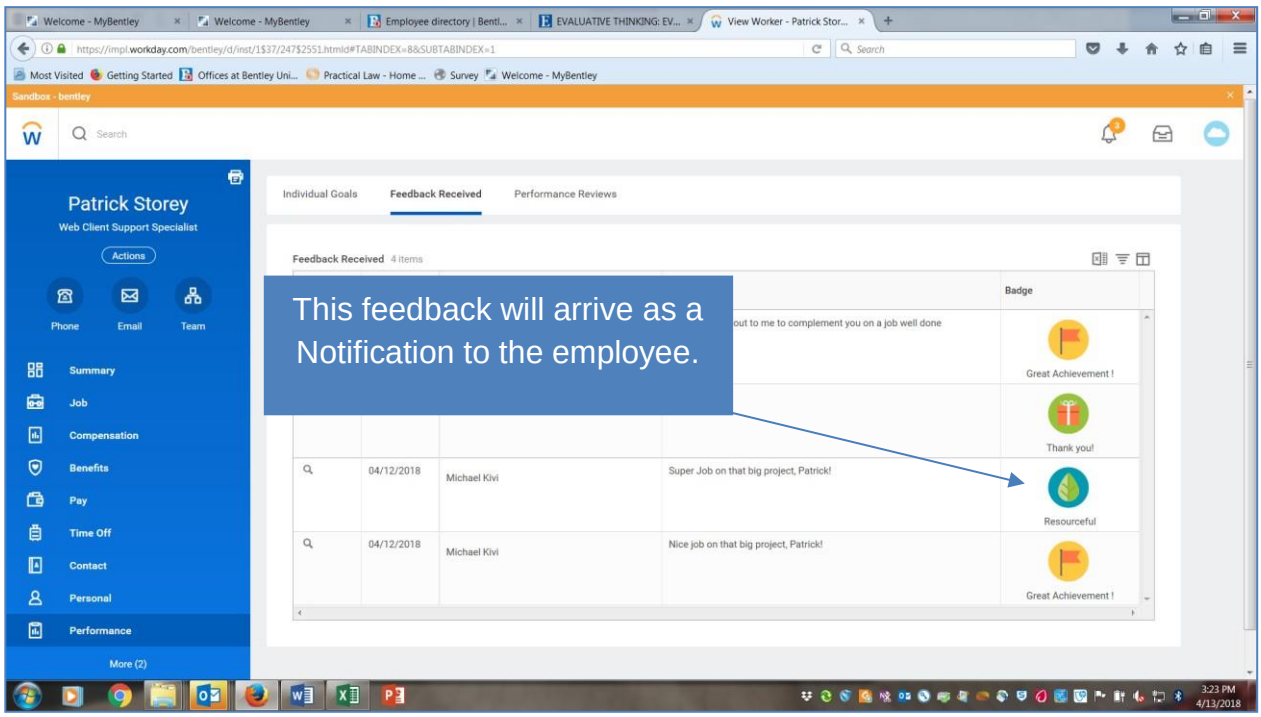
For the "Question" in the Feedback form, put the date of the meeting. You will then send the request for feedback to yourself to input the "answer," i.e., your notes on the meeting. None of this information will be visible to the employee.


You have submitted
Get Feedback: Patrick Storey
Actions
Up Next
Michael Kivi
Give Requested Feedback
Open
Do Another
Get Feedback on Worker
Details and Process
Done
Select Open to capture your Notes on the meeting.


Give Feedback
Patrick Storey
Actions
Requested by: Michael Kivi On: 04/13/2018
Your feedback will not be shared with Patrick Storey.
Question
Notes from 4/30/2018
Feedback
Format
Submit
Save for Later
Cancel
The "question" is the date of the meeting, and below that you can enter your notes. Then Submit.

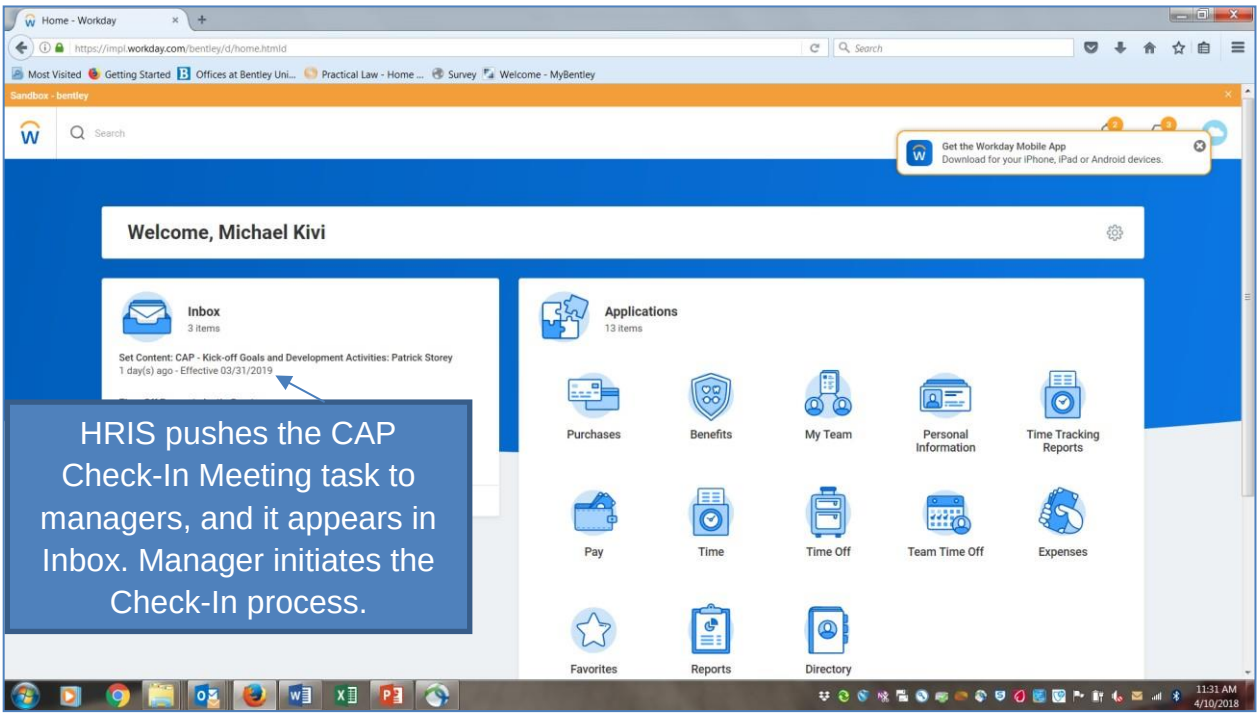


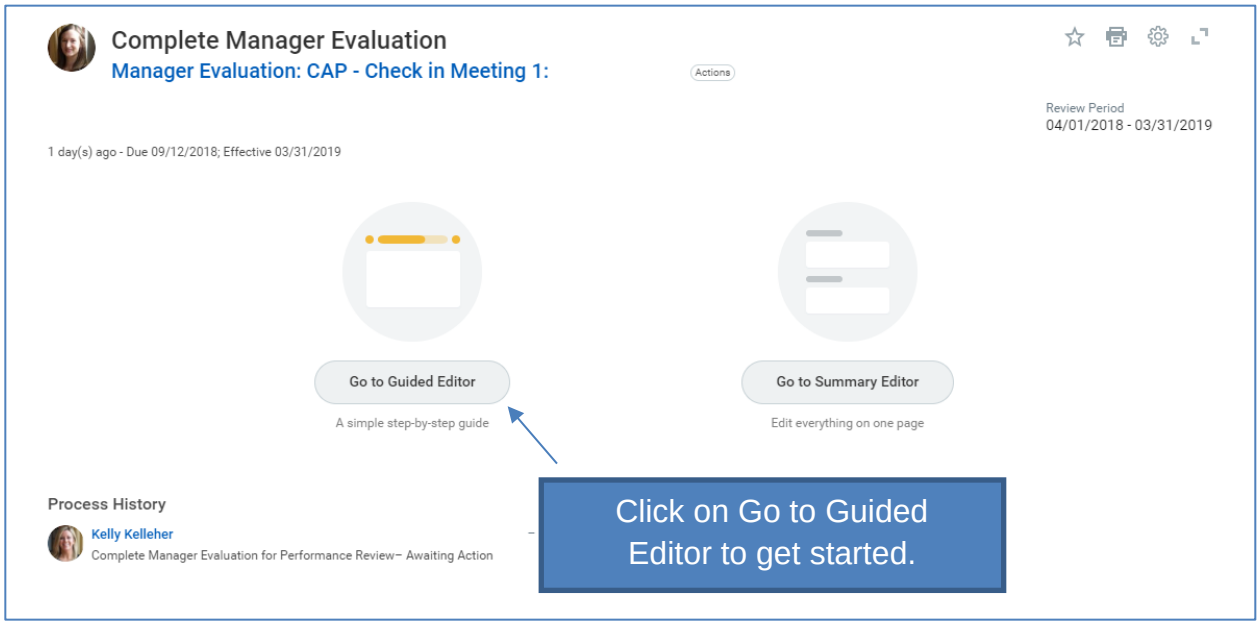
EMPLOYEE'S SCREEN

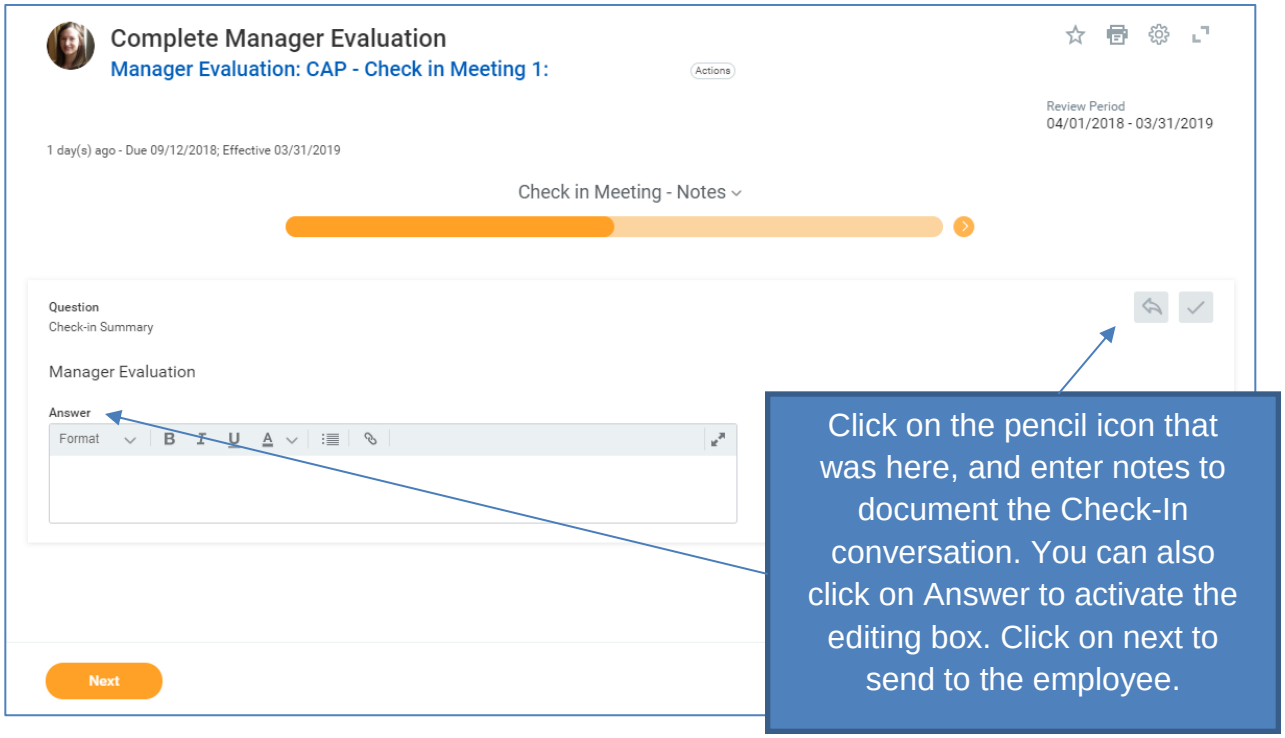


PART 2: CHECK-IN MEETINGS

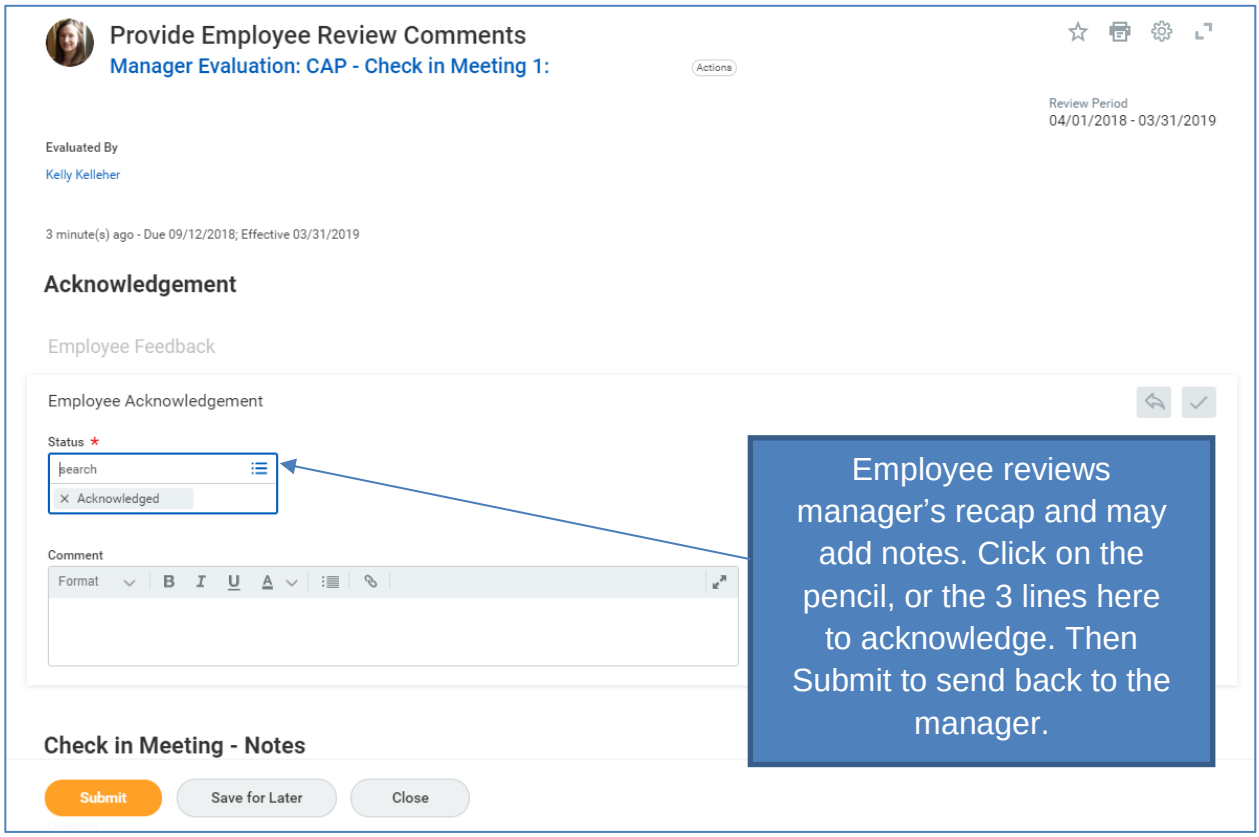
MANAGER'S SCREEN



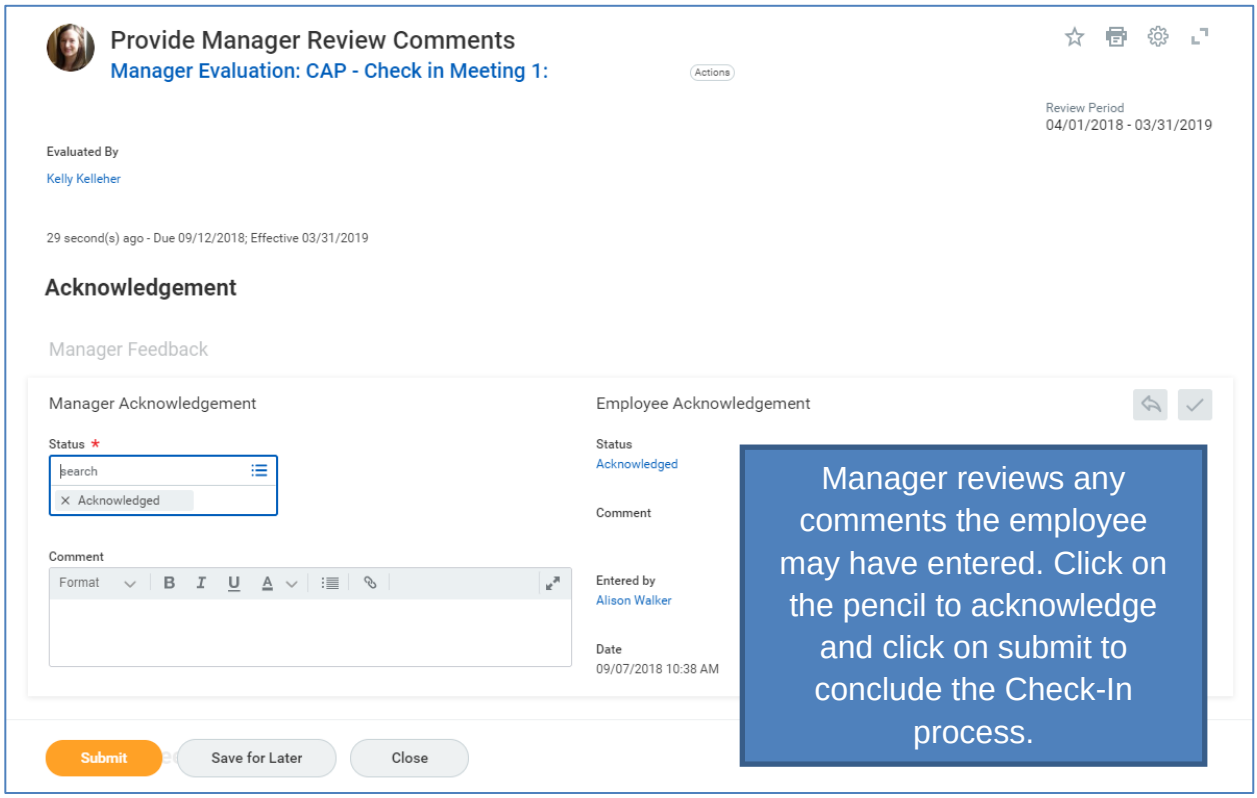




EMPLOYEE'S SCREEN

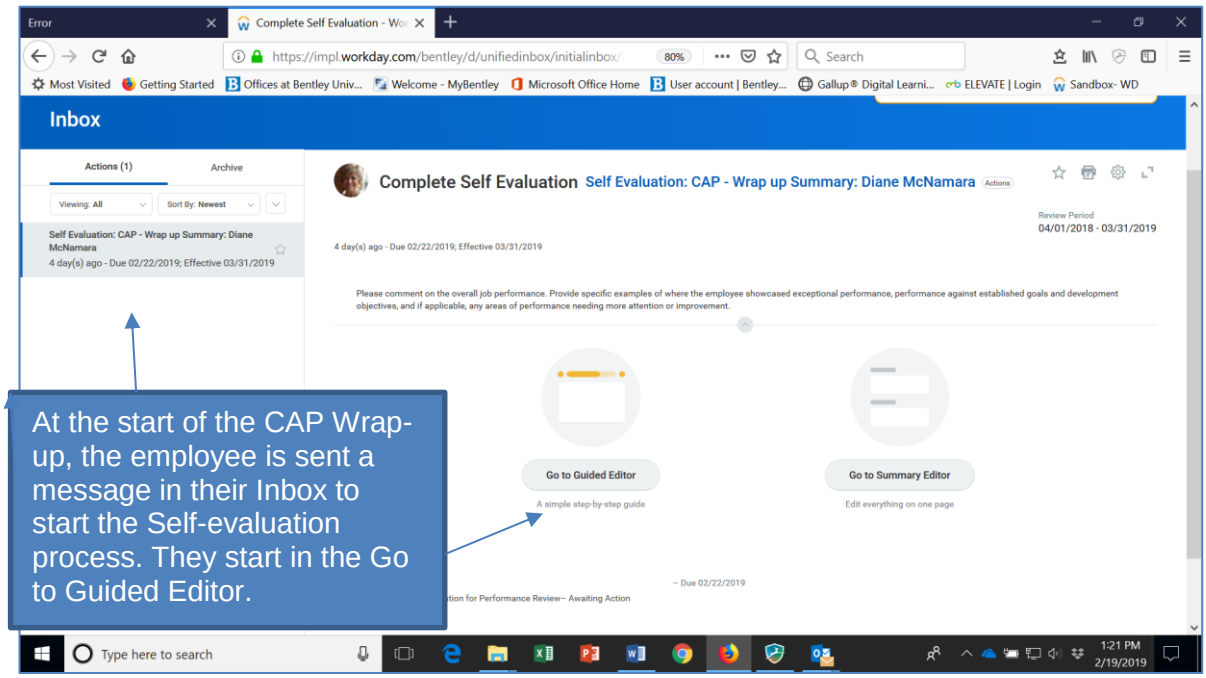


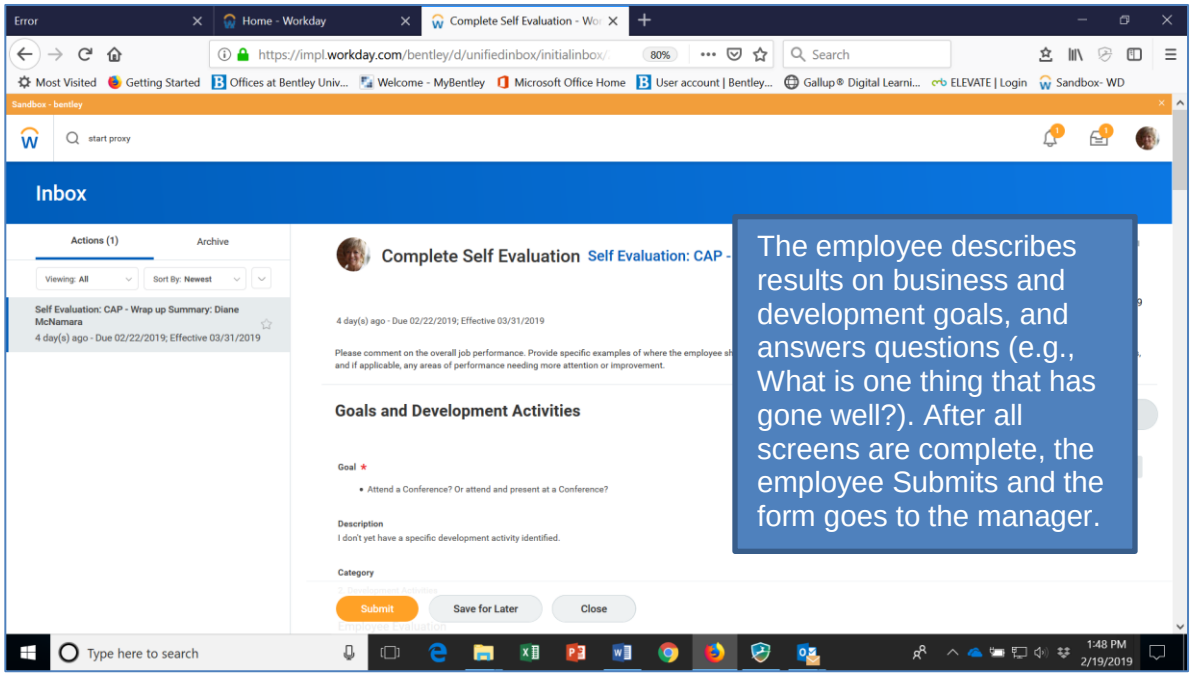
MANAGER'S SCREEN



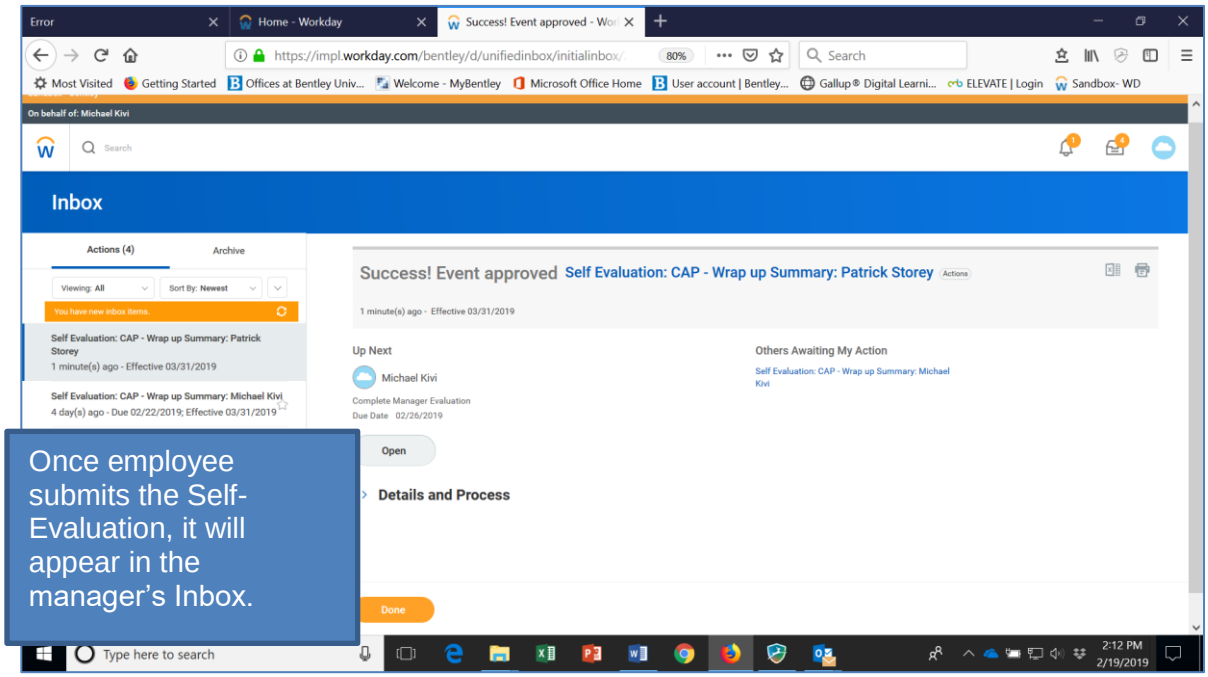
Please note that the process is identical for each Check-In cycle. Please contact your Human Resources Business Partner if you have any questions or require additional assistance.

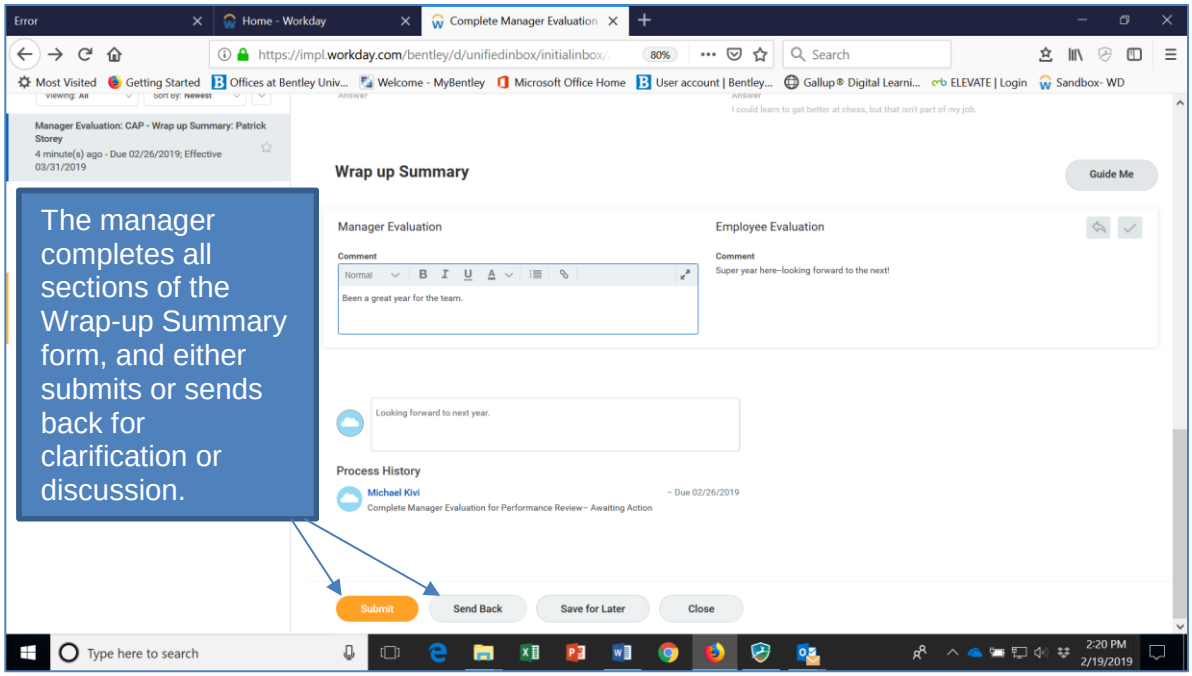
PART 3 – CAP WRAP-UP

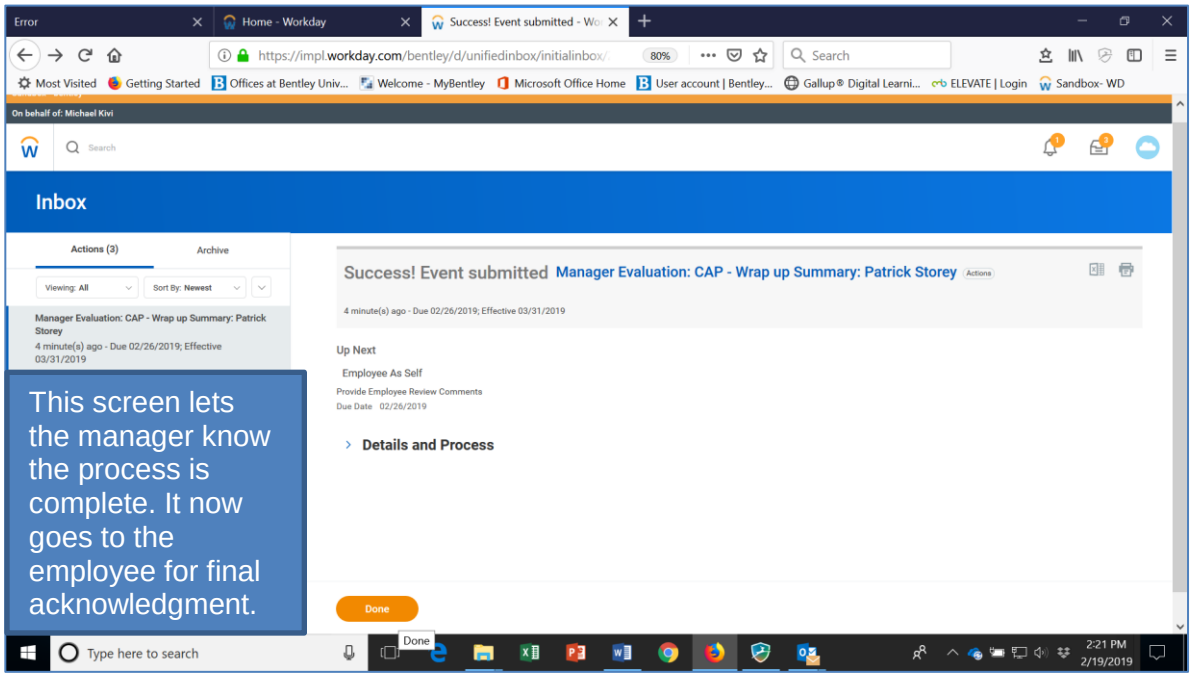


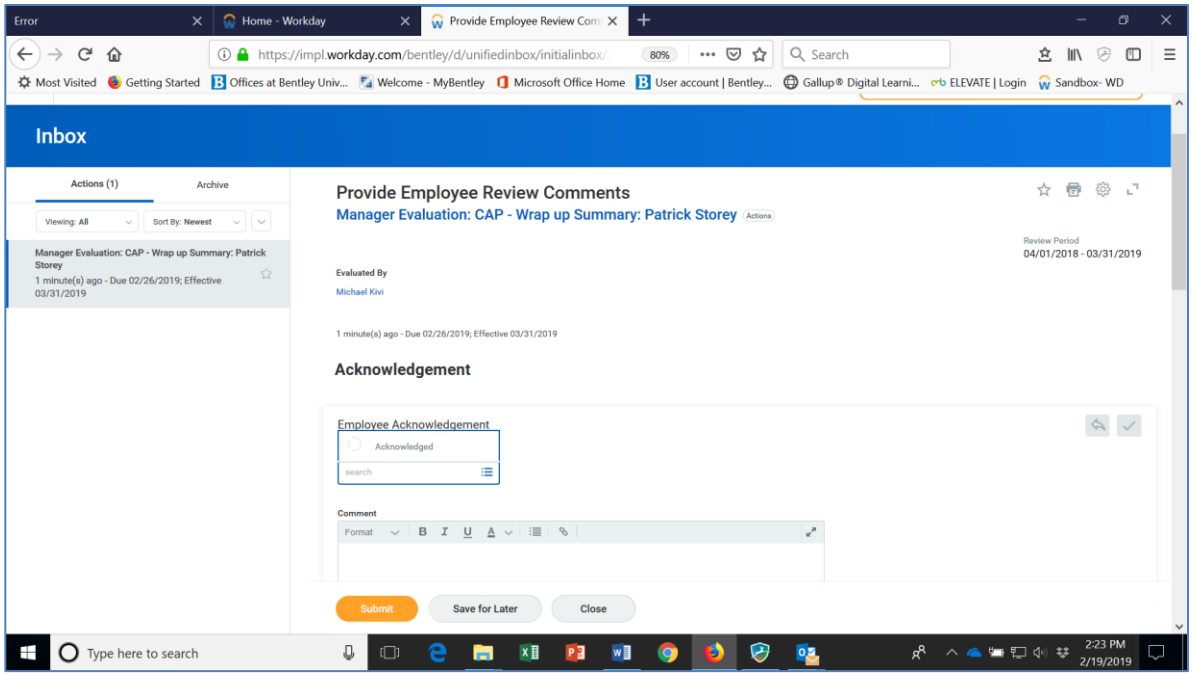


MANAGER'S SCREEN




Wrap up Summary
Guide Me
Manager Evaluation
Employee Evaluation
Comment
Been a great year for the team.
Super year here–looking forward to the next!
Process History
Michael Kivi
Complete Manager Evaluation for Performance Review– Awaiting Action
Submit
Send Back
Save for Later
Close
The manager completes all sections of the Wrap-up Summary form, and either submits or sends back for clarification or discussion.


Inbox
Actions (3)
Archive
Success! Event submitted Manager Evaluation: CAP - Wrap up Summary: Patrick Storey
Up Next
Employee As Self
Provide Employee Review Comments
Due Date 02/26/2019
Details and Process
Done
This screen lets the manager know the process is complete. It now goes to the employee for final acknowledgment.



Time to start planning Goals!