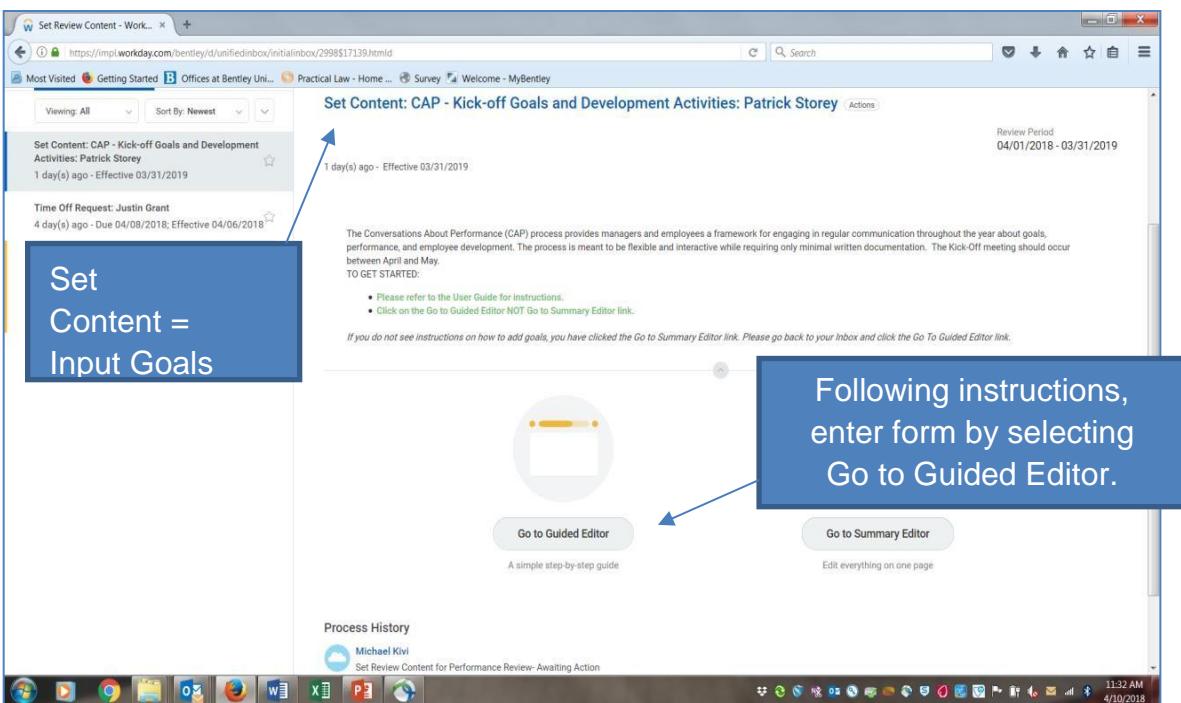
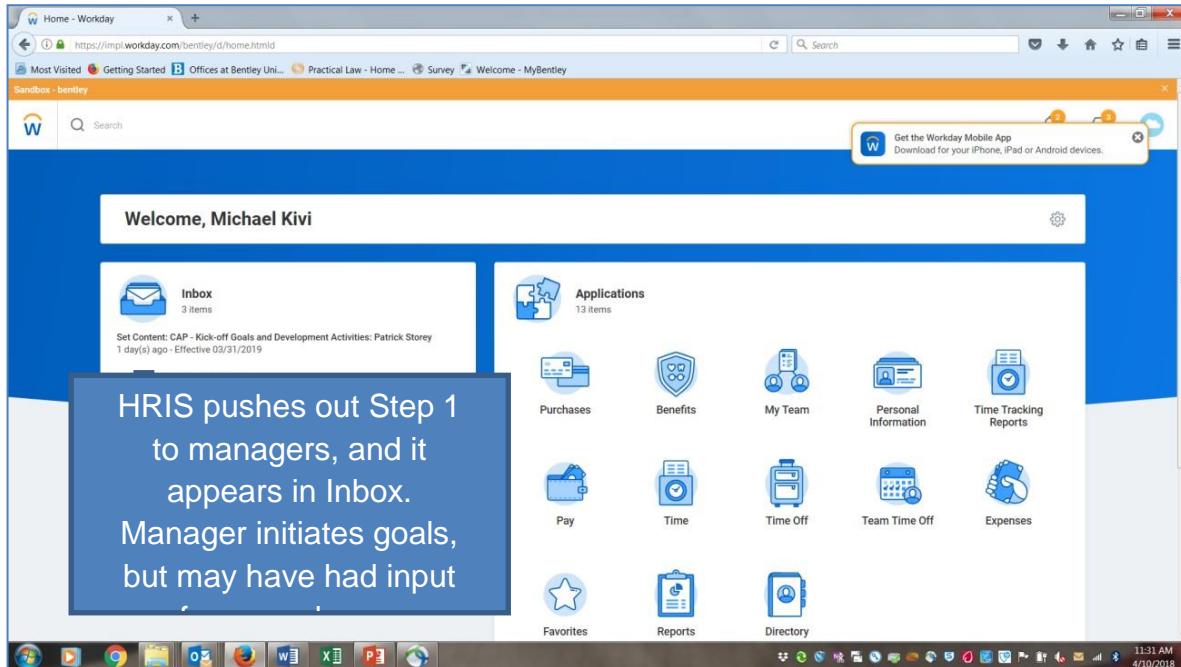


Workday - User Guide to Performance Management(CAP)

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

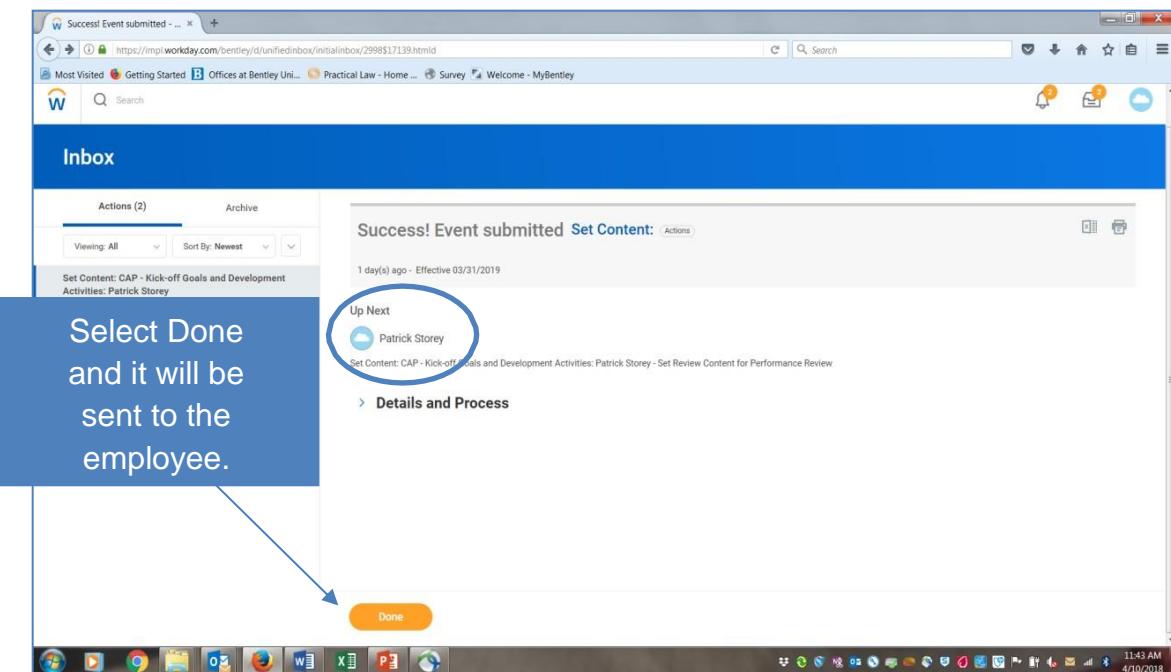
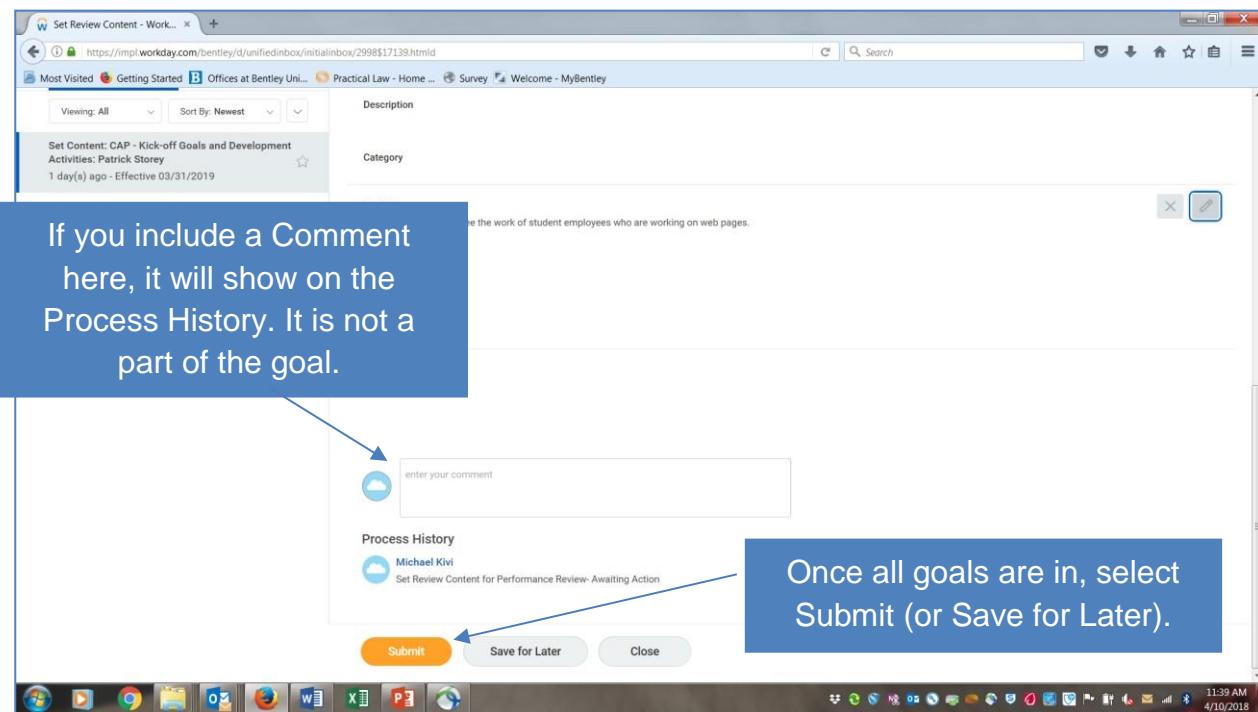


MANAGER'S SCREEN

The screenshot shows a web browser window titled "Set Review Content - Workday". The URL is [https://mpl.workday.com/bentley/d/unifiedinbox/initialinbox/2998\\$17139.html](https://mpl.workday.com/bentley/d/unifiedinbox/initialinbox/2998$17139.html). The page header includes links for "Most Visited", "Getting Started", "Offices at Bentley Uni...", "Practical Law - Home", "Survey", "Welcome - MyBentley", and "Search". The main content area is titled "Set Content: CAP - Kick-off Goals and Development Activities: Patrick Storey". It displays a message about the manager beginning the Kick-off process by drafting goals for the upcoming year. A blue callout box with a white arrow points to the "Add" button on the left side of the screen, which is highlighted with a blue border. The text in the callout box reads: "Select Add to begin adding goals." Below the "Add" button is a "Next" button.

The screenshot shows the same "Set Content" page. On the left, a blue callout box contains the text: "Input Goal 1 in the box. Select Goal Category; this is required. If you do not select Category, you will receive an Error message upon Submitting, and you will need to Re-Open form." An arrow points from this box to the "Add" button in the goal list. On the right, another blue callout box with a white arrow points to the "Next" button at the bottom of the page, which is highlighted with a blue border. The text in this callout box reads: "Select Add to continue adding goals." Below the "Next" button is a "Do not select Next until all goals are added." message.

MANAGER'S SCREEN CONT.



Submitted - Workday

Actions (2) Archive

Submitted Set Content: Actions

1 day(s) ago - Effective 03/31/2019

Up Next

Patrick Storey

Set Content: CAP - Kick-off Goals and Development Activities: Patrick Storey - Set Review Content for Performance Review

Details and Process

For: Patrick Storey

Overall Process: CAP - Kick-off Goals and Development Activities: Patrick Storey

Overall Status: In Progress

Process:

Current Process: Set Content:

Process Status: In Progress

Process History: 2 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Set Review Content for Performance Review	Set Review Content for Performance Review	Submitted	04/10/2018 11:43:31 AM		Michael Kivi (Primary Manager)	
Set Review Content for Performance Review	Approval by Manager	Not Required				

Set Content = Input Goals

Screen shows where form is in the process.

Process history tracks all steps (and any Comments).

EMPLOYEE'S SCREEN

Set Review Content - Workday

Viewing: All Sort By: Newest

Set Content: CAP - Kick-off Goals and Development Activities: Patrick Storey 2 hour(s) ago - Effective 03/31/2019

Category: 1. Individual Goals

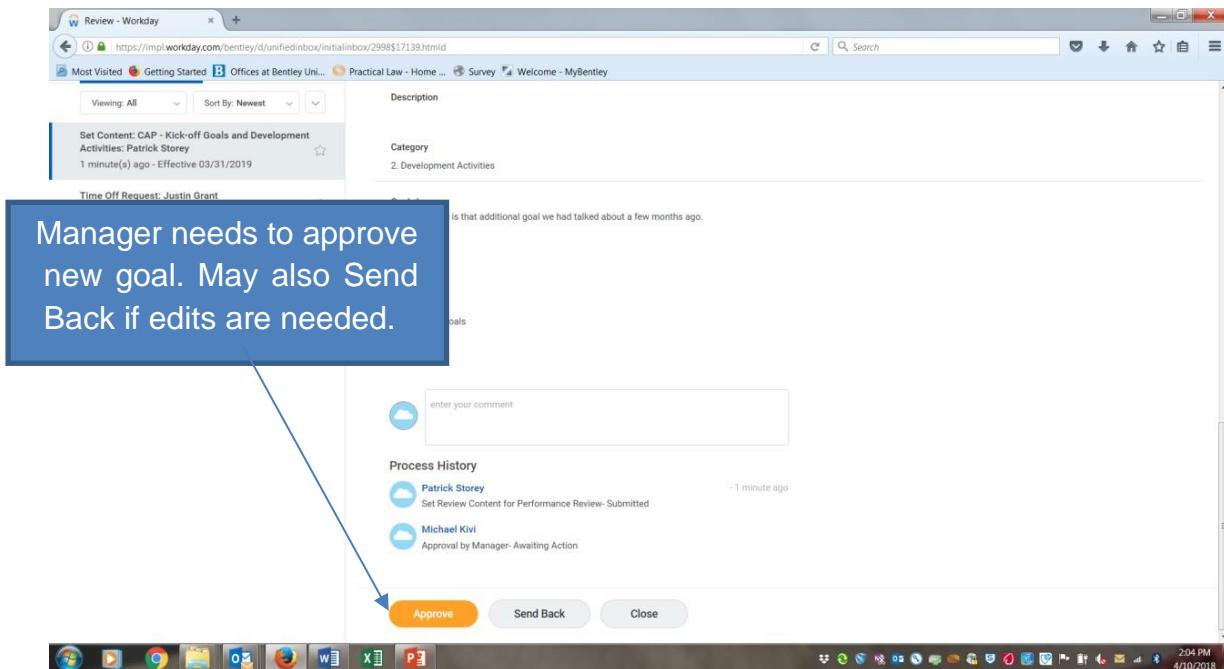
Goal #2: Goal #2 is to help oversee the work of student employees who are working on web pages.

Description: Additional goal we had talked about a few months ago.

Next

Once Manager Submits, Employee receives notice in Inbox. Employee has added a fourth goal, then selects Next; once they select Submit, it will flow to the manager for approval.

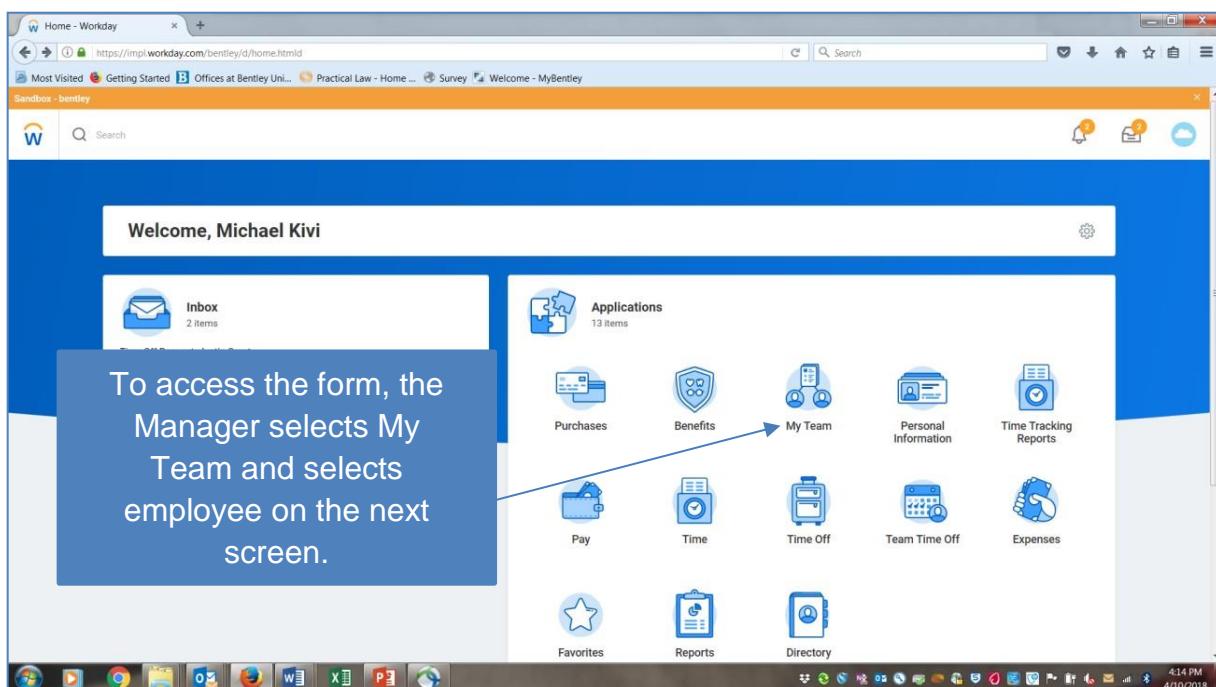
MANAGER'S SCREEN



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.

The screenshot shows the Workday interface for a manager named Patrick Storey. The left sidebar has tabs for Summary, Job, Compensation, Time Off, Contact, Performance, and Overview. The main content area shows basic employee details: Employee ID B04006842, Position Title P00110 Web Client Support Specialist, Manager Michael Kivi, and Cost Center 4401 Marketing Services. A large blue callout box points to the 'Performance' tab in the sidebar with the text 'Go to Performance.' To the right is a 'Job Details' section with various employment parameters. The status bar at the bottom shows the date 4/10/2018 and time 4:23 PM.

The screenshot shows the Workday interface for a manager named Patrick Storey, focusing on the Individual Goals tab. The left sidebar is identical to the previous screenshot. The main content area displays a list of goals for Patrick, including Goal #1, Goal #2, Goal #3, and Goal #4. A blue callout box points to the 'Feedback Received' tab with the text 'To give or receive feedback, or to create meeting notes, select Feedback Received.' Another blue callout box points to the goal list with the text 'Each goal is viewable and editable.' The status bar at the bottom shows the date 4/10/2018 and time 4:25 PM.

The system allows managers to solicit feedback from others with whom the employee has worked. Neither the names (s) of the individual(s) solicited nor the feedback itself will be viewable to the employee.

This feature can also be used by managers for recording notes on meetings, not visible to the employee

This feature allows managers to give feedback (and badges) directly to the employee.

MANAGER SOLICITS FEEDBACK FROM OTHERS

From Workers *

Display names of the workers who gave feed

Yes

Who can see the feedback?

Everyone
 Each worker selected and me

Questions

Feedback Template

Add

Submit Save for Later Cancel

The Guided Tour feature is available for the Get Feedback function, should you need it.

Help Available
Use this icon to view field level help for this page.
 Don't display this message again
Show Me

MANAGER SOLICITS FEEDBACK FROM OTHERS, CONT.

The screenshot shows the 'Get Feedback' page in Workday. At the top, there is a search bar and a 'From Workers' field with a dropdown arrow. Below it, a question asks 'Display names of the workers who gave feedback?' with a 'Yes' checkbox selected. A note to the right says: 'Search here for names of those whose feedback you are requesting.' In the 'Who can see the feedback?' section, there are two radio buttons: 'Everyone' and 'Each worker selected and me'. The 'Everyone' button is circled in orange, and a note to the right states: 'Only the Manager will see the feedback. These two buttons are irrelevant'. Below this is a 'Questions' section with a 'Feedback Template' dropdown and an 'Add' button. A note to the right says: 'Select the Feedback Template. Two feedback questions are pre-loaded. Additional questions may be input.' At the bottom are 'Submit', 'Save for Later', and 'Cancel' buttons.

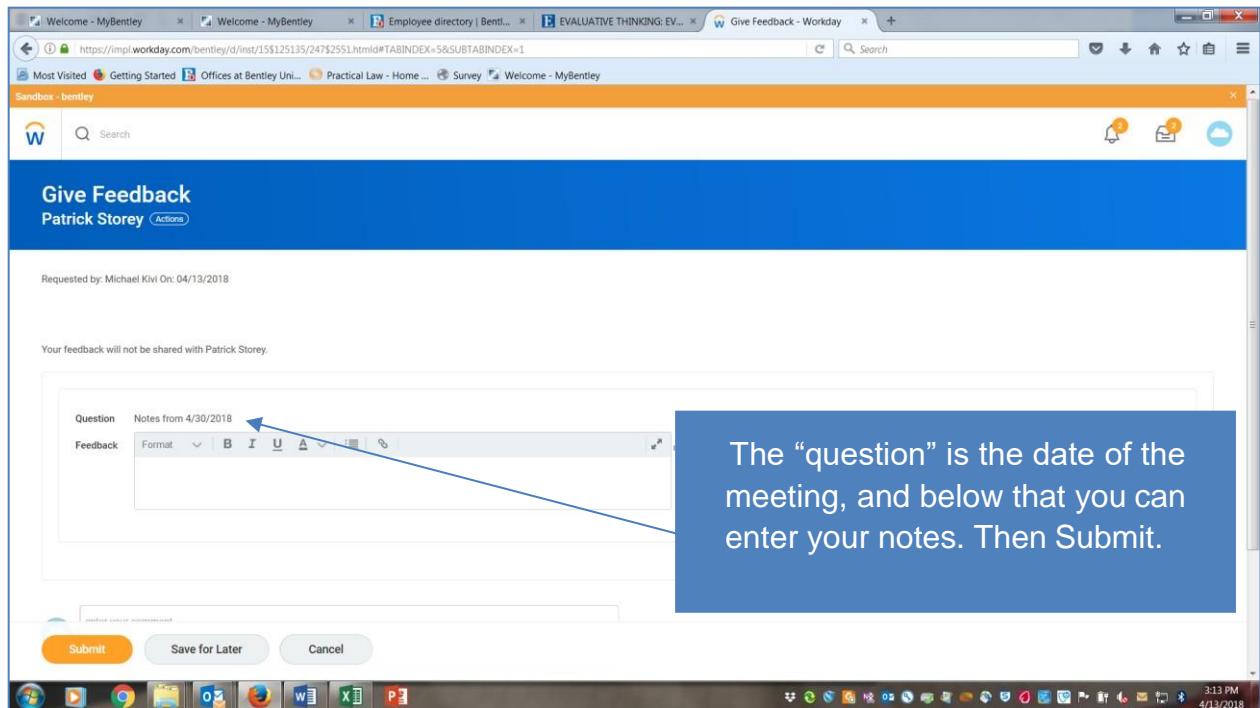
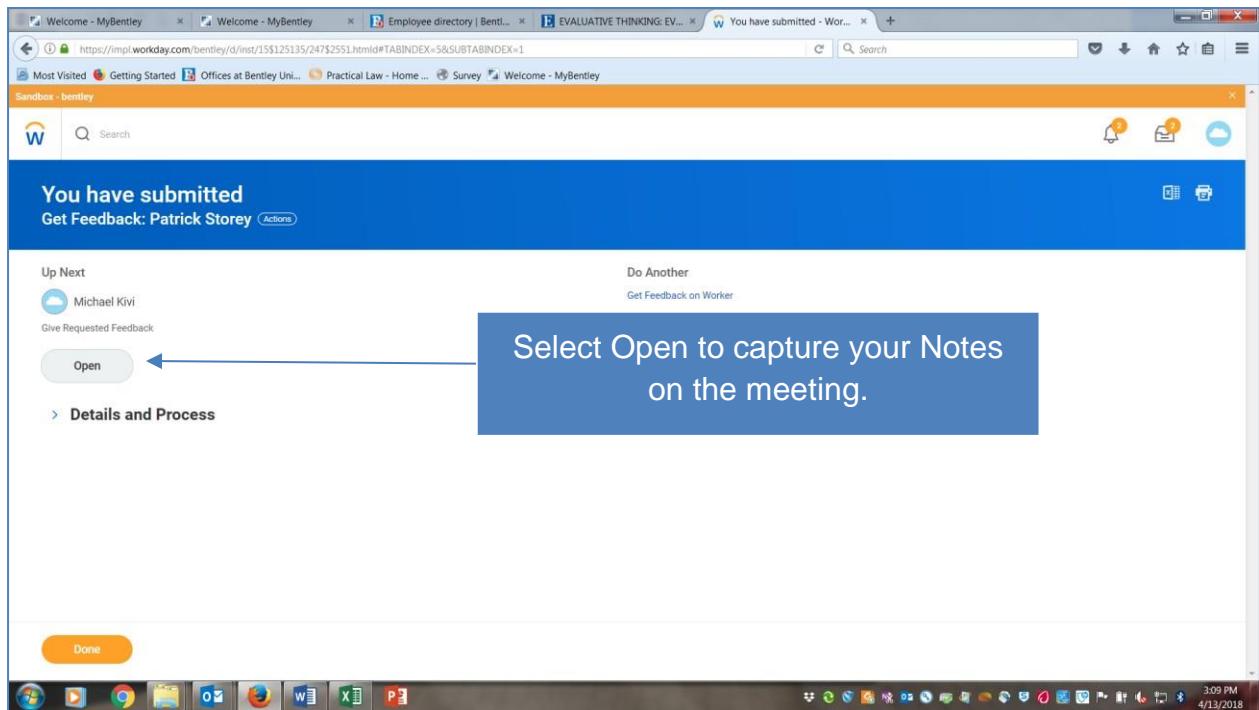
The screenshot shows the 'Get Feedback' page in Workday with the 'Questions' section expanded. It displays two pre-loaded questions. The first question is 'In your experience of working with this employee, what is one thing that s/he has done exceptionally well?' and the second is 'What is one thing that you would advise this employee to do more of, do better or do differently?'. Both questions have 'Remove' and 'Add' buttons below them. A note to the right says: '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.' At the bottom are 'Submit', 'Save for Later', and 'Cancel' buttons.

MANAGER CREATES PERSONAL MEETING NOTES NOT VISIBLE TO EMPLOYEE

The screenshot shows a browser window with several tabs open. The active tab is titled 'Get Feedback - Workday'. The page displays a form for creating feedback. At the top, there's a section for 'From Workers' set to 'Michael Kivi'. Below it, a question asks 'Display names of the workers who gave feedback?' with a 'Yes' checkbox checked. Another section asks 'Who can see the feedback?' with two options: 'Everyone' (radio button) and 'Each worker selected and me' (radio button, which is selected and highlighted with an orange oval). A blue callout box with yellow text 'Do not need to touch' points to this second option. The main area is titled 'Questions' and contains a 'Feedback Template' with a rich text editor. The editor has a toolbar with 'Normal' and other styles, and a note area containing 'Notes from 4/30/2018'. Buttons for 'Remove', 'Add', 'Submit' (highlighted with a blue arrow), 'Save for Later', and 'Cancel' are at the bottom. The status bar at the bottom of the screen shows the date and time: '3:04 PM 4/13/2018'.

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.

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.



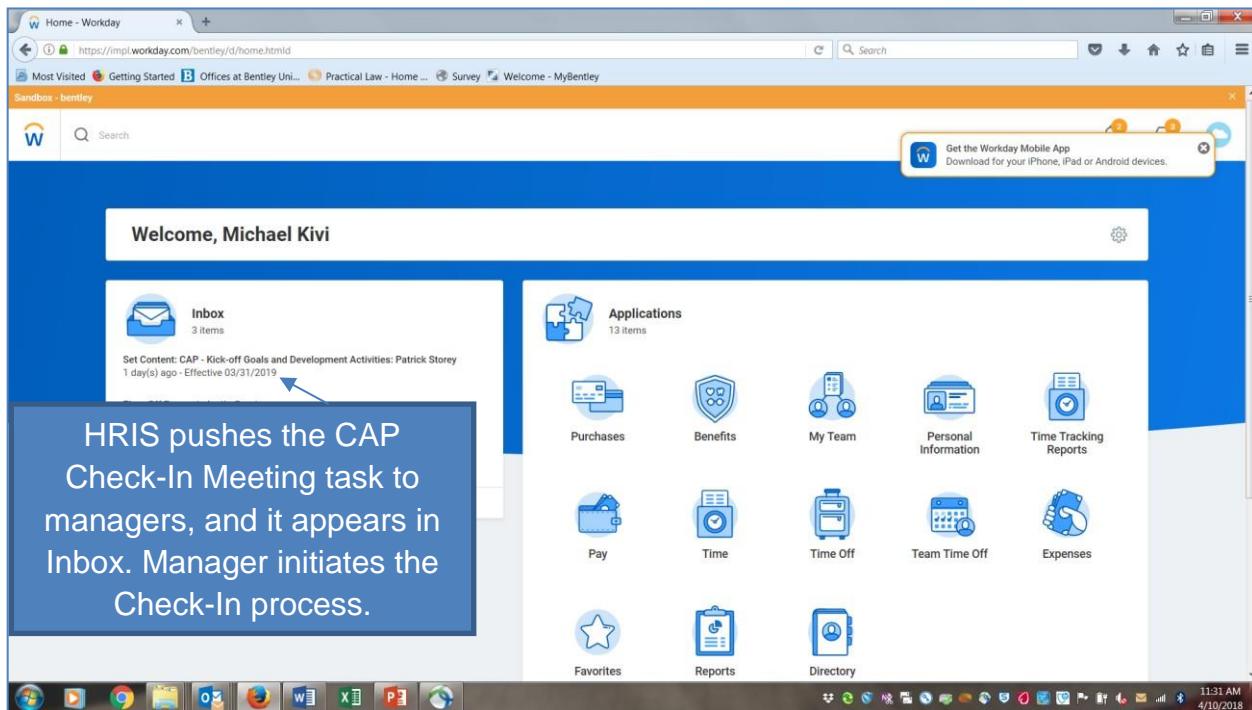
The screenshot shows a browser window titled "Give Feedback - Workday". The URL is [https://impl.workday.com/bentley/d/inst/155125135/247\\$2551.html#TABINDEX=5&SUBTABINDEX=1](https://impl.workday.com/bentley/d/inst/155125135/247$2551.html#TABINDEX=5&SUBTABINDEX=1). The page title is "Give Feedback" and the user is "Patrick Storey". A blue callout box on the right says: "The system also allows the manager to Give Feedback directly to the employee—including a badge!". The main form has a "Feedback" rich text editor containing "Super Job on that big project, Patrick!" and a "Badge" dropdown set to "Resourceful". There are "Submit", "Save for Later", and "Cancel" buttons at the bottom.

EMPLOYEE'S SCREEN

The screenshot shows a browser window titled "Employee directory | Bentley". The URL is [https://impl.workday.com/bentley/d/inst/1537/247\\$2551.html#TABINDEX=8&SUBTABINDEX=1](https://impl.workday.com/bentley/d/inst/1537/247$2551.html#TABINDEX=8&SUBTABINDEX=1). The page title is "View Worker - Patrick St...". A blue callout box on the right says: "This feedback will arrive as a Notification to the employee.". The main area shows a "Feedback Received" section with two items from "Michael Kivi": "Super Job on that big project, Patrick!" and "Nice job on that big project, Patrick!". Each item has a "Badge" icon next to it: "Great Achievement!" (yellow flag), "Thank you!" (green gift), and "Resourceful" (blue leaf). The left sidebar shows the employee's profile: "Patrick Storey" (Web Client Support Specialist) and links to "Individual Goals", "Feedback Received" (selected), and "Performance Reviews".

PART 2: CHECK-IN MEETINGS

MANAGER'S SCREEN



A screenshot of a Workday task titled "Complete Manager Evaluation". The task header includes a profile picture, the title "Manager Evaluation: CAP - Check in Meeting 1:", and a "Actions" button. Below the header, it says "1 day(s) ago - Due 09/12/2018; Effective 03/31/2019". On the right, there are two large circular icons: one with a progress bar labeled "Go to Guided Editor" and another with a list labeled "Go to Summary Editor". A blue callout box with white text overlays these buttons, stating: "Click on Go to Guided Editor to get started." An arrow points from the text in this box to the "Go to Guided Editor" button. At the bottom left, there is a "Process History" section for "Kelly Kelleher" with the note "Complete Manager Evaluation for Performance Review- Awaiting Action". The bottom right corner of the screen shows the date "04/01/2018 - 03/31/2019".

 Complete Manager Evaluation
Manager Evaluation: CAP - Check in Meeting 1:

1 day(s) ago - Due 09/12/2018; Effective 03/31/2019

Check in Meeting - Notes ▾

Question
Check-in Summary

Manager Evaluation

Answer

Format **I** **U** **A** | :| |

Next

Actions

Review Period
04/01/2018 - 03/31/2019

Click on the pencil icon that was here, and enter notes to document the Check-In conversation. You can also click on Answer to activate the editing box. Click on next to send to the employee.

EMPLOYEE'S SCREEN

 Provide Employee Review Comments
Manager Evaluation: CAP - Check in Meeting 1:

Evaluated By
Kelly Kelleher

3 minute(s) ago - Due 09/12/2018; Effective 03/31/2019

Acknowledgement

Employee Feedback

Employee Acknowledgement

Status *

Search
 Acknowledged

Comment

Format **I** **U** **A** | :| |

Check in Meeting - Notes

Submit Save for Later Close

Actions

Review Period
04/01/2018 - 03/31/2019

Employee reviews manager's recap and may add notes. Click on the pencil, or the 3 lines here to acknowledge. Then Submit to send back to the manager.

MANAGER'S SCREEN

The screenshot shows a web-based application for manager review comments. At the top, there is a profile picture of a woman and the text "Provide Manager Review Comments". Below this, it says "Manager Evaluation: CAP - Check in Meeting 1:" and "Actions". On the right, there are icons for star, print, settings, and a search bar. The text "Review Period 04/01/2018 - 03/31/2019" is displayed.

Underneath, it says "Evaluated By Kelly Kelleher" and "29 second(s) ago - Due 09/12/2018; Effective 03/31/2019".

Acknowledgement

Manager Feedback

Manager Acknowledgement

Status *
X Acknowledged

Comment

Employee Acknowledgement

Status Acknowledged

Comment

Entered by Alison Walker

Date 09/07/2018 10:38 AM

Buttons: Submit, Save for Later, Close

A blue callout box on the right contains the text: "Manager reviews any comments the employee may have entered. Click on the pencil to acknowledge and click on submit to conclude the Check-In process."

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

The screenshot shows a Microsoft Edge browser window with the address bar "https://impl.workday.com/bentley/d/unifiedinbox/initialinbox/". The title bar says "Error" and "Complete Self Evaluation - Workday". The main content is an "Inbox" screen. A message from "Diane McNamara" is visible, titled "Self Evaluation: CAP - Wrap up Summary: Diane McNamara". The message was sent "4 day(s) ago - Due 02/22/2019; Effective 03/31/2019". The text in the message says: "Please comment on the overall job performance. Provide specific examples of where the employee showcased exceptional performance, performance against established goals and development objectives, and if applicable, any areas of performance needing more attention or improvement." Below the message, there are two buttons: "Go to Guided Editor" and "Go to Summary Editor". Arrows point from a text box to both buttons. The text box contains the following text: "At the start of the CAP Wrap-up, the employee is sent a message in their Inbox to start the Self-evaluation process. They start in the Go to Guided Editor." The status bar at the bottom shows "Type here to search" and various system icons.

The screenshot shows a Microsoft Edge browser window with the Workday inbox open. A task titled "Complete Self Evaluation" is visible in the inbox. The task details are as follows:

- Self Evaluation: CAP - Wrap up Summary: Diane McNamara**
- Due Date: 02/22/2019; Effective 03/31/2019
- Description: Please comment on the overall job performance. Provide specific examples of where the employee has exceeded expectations and if applicable, any areas of performance needing more attention or improvement.
- Goals and Development Activities**
- Goal ***: Attend a Conference? Or attend and present at a Conference?
- Description**: I don't yet have a specific development activity identified.
- Category**: Development Activities

At the bottom of the task card are three buttons: "Submit", "Save for Later", and "Close". A blue callout box highlights the text: "The employee describes results on business and development goals, and answers questions (e.g., What is one thing that has gone well?). After all screens are complete, the employee Submits and the form goes to the manager."

MANAGER'S SCREEN

The screenshot shows a Microsoft Edge browser window with the Workday inbox open. A task titled "Success! Event approved" is visible in the inbox. The task details are as follows:

- Success! Event approved Self Evaluation: CAP - Wrap up Summary: Patrick Storey**
- Effective Date: 03/31/2019
- Up Next**: Michael Kivi (Complete Manager Evaluation, Due Date: 02/26/2019)
- Others Awaiting My Action**: Self Evaluation: CAP - Wrap up Summary: Michael Kivi

A blue callout box highlights the text: "Once employee submits the Self-Evaluation, it will appear in the manager's Inbox."

The manager completes all sections of the Wrap-up Summary form, and either submits or sends back for clarification or discussion.

This screenshot shows the 'Wrap up Summary' form in the Workday interface. The form includes sections for 'Manager Evaluation' and 'Employee Evaluation', both with rich text editors containing comments. Below these are sections for 'Process History' and a note about looking forward to next year. At the bottom are buttons for 'Submit', 'Send Back', 'Save for Later', and 'Close'. A blue callout box on the left side of the screen highlights the text: 'The manager completes all sections of the Wrap-up Summary form, and either submits or sends back for clarification or discussion.'

This screen lets the manager know the process is complete. It now goes to the employee for final acknowledgment.

This screenshot shows the Workday inbox after a submission. It displays a success message: 'Success! Event submitted Manager Evaluation: CAP - Wrap up Summary: Patrick Storey'. Below this, there's a section for 'Up Next' labeled 'Employee As Self' with a note to 'Provide Employee Review Comments' due on 02/26/2019. A blue callout box on the left side of the screen highlights the text: 'This screen lets the manager know the process is complete. It now goes to the employee for final acknowledgment.'

