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

HRIS pushes out Step 1 to managers, and it appears in Inbox. Manager initiates goals, but may have had input.

Set Content = Input Goals

Following instructions, enter form by selecting Go to Guided Editor.
Select Add to begin adding goals.

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.

Select Add to continue adding goals.

Do not select Next until all goals are added.
Once all goals are in, select Submit (or Save for Later).

If you include a Comment here, it will show on the Process History. It is not a part of the goal.

Select Done and it will be sent to the employee.
Screen shows where form is in the process.

Process history tracks all steps (and any Comments).

**Employee’s Screen**

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.
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.

To access the form, the Manager selects My Team and selects employee on the next screen.
Go to Performance.

To give or receive feedback, or to create meeting notes, select Feedback Received.

Each goal is viewable and editable.
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

The Guided Tour feature is available for the Get Feedback function, should you need it.
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.
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.
Select Open to capture your Notes on the meeting.

The “question” is the date of the meeting, and below that you can enter your notes. Then Submit.
The system also allows the manager to Give Feedback directly to the employee—including a badge!

This feedback will arrive as a Notification to the employee.
PART 2: CHECK-IN MEETINGS

MANAGER’S SCREEN

HRIS pushes the CAP Check-In Meeting task to managers, and it appears in Inbox. Manager initiates the Check-In process.

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

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

Go to Guided Editor
A simple step-by-step guide

Go to Summary Editor
Edit everything on one page

Click on Go to Guided Editor to get started.
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 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.
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

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.
Once employee submits the Self-Evaluation, it will appear in the manager’s Inbox.

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.
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.
Time to start planning Goals!