Cornell University

Performance Dialogue
For Employees and Managers

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Note: This reference guide includes instructions for both employee and the manager process.

Employee: Complete Your Self-Evaluation

1. Go to Workday (http://workday.cornell.edu) and click the Log In button.
2. Open your **Workday Inbox** by clicking on your employee photo in the upper right-hand corner and selecting **Inbox**.
3. Select the **Self-Evaluation** item.

   Note: Click **Toggle full screen viewing mode** in the top-right side of your inbox item to view it full-screen.

4. Click **Go to Guided Editor** ***(recommended)***.
5. Enter information in each of the employee self-evaluation sections, beginning with the Performance Dialogue Questions. Either click on the pencil icon to the right or simply click near the word **Answer**.
6. To move to the next section, click on the **Next** button at the bottom of the page.
7. There is a new section in this year's performance dialogue. It is the **Performance Dialogue Acknowledgement**.

   Note: As an employee, you are acknowledging that a meeting has been scheduled between you and the manager to discuss the performance dialogue.

8. Review all your answers again on the **Final Summary** screen. If you omitted a response or would like to edit a previously recorded answer, you may do so on this screen.

   If you wish to exit at any time, your work will be saved. Return to where you left off by clicking on the same task in your **Workday Inbox**.

9. Click **Submit** to complete the evaluation. The evaluation routes to your manager.

   Note: If you need to do further edits after you have submitted your dialogue, you will need to ask your manager to **Send Back** the dialogue from their Inbox.

Employee: Print Self-Evaluation, as applicable.

- As you progress through the self-evaluation screens, click on the print icon in the upper right-hand corner, at any time to view a printable version of your responses.
- After you submit your dialogue, from the **Home** page, click on the **Menu** in the upper left-hand corner, click on the **Performance** icon on the Workday homepage, then under the **View** section, select **Reviews** and click on the **Create New PDF** button.

   Note: A message will appear in the upper right-hand corner of the screen once the printable PDF is generated.

Making Updates after you Clicked ‘Submit’

To make further revisions or updates after you clicked on **Submit** button, ask your Manager to “Send Back” your dialogue.

Manager: Complete Manager Evaluation of Employee

1. From your Workday Inbox, click the **Manager Evaluation** task.
2. Click **Go to Guided Editor** (***recommended***).
3. Enter information in each of the employee evaluation sections, similar to the process for the Employee Self-Evaluation.
4. To move to the next section, click the **Next** button at the bottom of the page.
5. There is a new section in this year’s performance dialogue. It is the **Performance Dialogue Acknowledgement**.

   Note: As a manager, you are acknowledging that a meeting has taken place between you and the employee to discuss the dialogue. After completing all the sections of the review, on the summary page, click **Save for Later** button. You can also use the **Print** icon to generate a PDF to share with your employee during the review process.

6. Click **Submit** to complete your evaluation.

Manager: Print or Share Performance Evaluations

1. In the search box, type *View Printable Employee Review*.
2. Select the appropriate Employee Review.
3. Click **OK**.
4. Click the **Print** icon. A notification displays below your Inbox when the report generates.
5. Click the notification link to access the report. The PDF downloads.

Sending Back a Dialogue

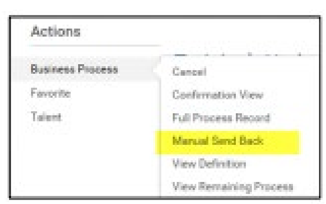
If an employee needs to make further revisions to their dialogue, you have two options for sending back the dialogue to the employee.

Manager has not submitted the dialogue:

1. On the relevant Workday Inbox item, go to the summary section.
2. Click **Send Back** to send back the performance dialogue to the employee.

Manager has submitted the dialogue:

1. From the **Home** page, click on the **Menu** in the upper left-hand corner, click the My **Team Management** icon on the Workday homepage, then from the **Manager Reports by Category** worklet**,** select **Performance** click **My Team’s Performance Review**.



2. Under the *Complete* section, locate the dialogue in the *Performance Review* column. Click the **…** button and then select **Business Process** > **Manual Send Back**.

3. Click on the dropdown under Send Back, select your name to send back. The managers must send back to themselves first.
4. Enter a Comment and click **Submit**.
5. Click **Open** to open the Performance Dialogue and click on **Go to Summary Editor**.
6. Once in the Manager evaluation, at the bottom of the page, click on **Send Back** and enter a reason. Click **Submit**.

Employee and Manager: Viewing Past Performance Dialogues

1. In the search box, type **View Printable Employee View**.
2. Select the **Employee** and **Performance Review**.
3. Click **View** button.

Reports (available to Managers and HR staff)

To access these reports, simply type the report name in the search box in the upper left-hand corner. Each of the reports will prompt you to enter the **Organization**. Enter the manager's name to find their associated organizations. The available reports are as follows:

- **Performance Dialogue Summary - Manager**
- **Performance Dialogue Status Overview – Manager**
- **Performance Dialogue Ratings Overview - Manager**