Frequently Asked Questions

This informational document provides answers to frequently asked questions and is divided into three sections:

Career, Talent & Performance

Performance Dialogues for Employees

1. How do I begin?

You can access workday via the Workday Website at http://www.workday.cornell.edu.
Workday also has a mobile app available for Apple iPhone/iPad devices via the App Store and on Android devices via the Google Play Store.

To start your Self-Evaluation by clicking on your picture in the upper-right hand corner, clicking on your **Inbox** and then on the **Self-Evaluation: Performance Dialogue** item.

2. Who can see my Self-Evaluation and what step?

Only you are able to view your responses while the **Self- Evaluation** is in progress. Once you click the **Submit** button on the Review page the information will route to your supervisor and/or support manager for review. At this point, if they wish, Human Resource staff and your supervisor's supervisor (also referred to as Manager's Manager) are also able your responses.

3. How do I print my Self-Evaluation?

Click on the print icon in the upper right-hand corner, *at any time* to view a printable version of your responses. It takes a minute or two for a PDF document to be produced. A message will appear in the upper right-hand corner of the screen once the printable PDF is generated.

4. If I exit the dialogue prior to completion, will it save my information?

Workday automatically saves your information as you move through the response fields – there is not a save button.   If you need to exit Workday part way through, when you return you will be prompted to *continue where you left off*.

5. What do I do if I need to make a change after I click the Submit button? How can I access it again?

After you click on **Submit** the Performance Dialogue is now located with your supervisor and/or support manager. You can ask them to "**Send Back**" your review. Once your revision is made, click **Submit** again to route it back to your supervisor.

6. **Can I view my position description in Workday?**

Employees who wish to view their Position Description can do so from the employee profile page, click on the **Career** worklet and then click on *Position Description* tab. If the position description is not in Workday, employees should contact their manager or HR representative.

7. **Can I attach a document to my Performance Review?**

Currently there is not an ability to attach documents as part of your review. You are able only able to add hyperlinks.

8. **Where is the spell-checker option?**

There is not a spell-checker icon as part of the Workday editor tool. However, if you have enabled the spellchecker feature on your internet browser it will denote errors as you type by underlining the word with a red line. Please contact your local IT support staff for guidance on how to enable this feature on your browser.

9. **By when do I need to complete my Self-Evaluation?**

Timelines will vary by organizations. Please contact or reference communications generated by your local HR representative.

10. **Where will my Performance Dialogue be stored?**

One of the advantages of using Workday is your completed performance dialogues are easily accessible by you, your supervisor and HR. Click on the **Performance** worklet on your employee profile page, click on **Performance Reviews** tab to view *In Progress* and *Completed* dialogues.

Performance Dialogues for Managers

1. **How do I begin?**

When your team member has submitted their **Self-Evaluation**, you will receive a Manager Evaluation item in your Workday **Inbox**. You may also follow this path from the **Home** page: click on the **Menu** in the upper left-hand corner, click the **Team Performance** icon then under View, click on **My Team's Performance Reviews**. This report will show you the current status of each of your direct reports. If the current step states **Complete Manager Evaluation,** you may click on that employee's performance review link to begin your evaluation.

2. **Can I complete my Evaluation in advance of the employee completing their Self-Evaluation?**
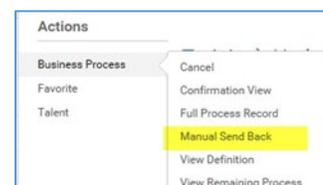
Employees begin the Performance Dialogue process by answering the questions in the **Self-Evaluation** portion of Workday. Only you are able to view your responses while the **Self- Evaluation** is in progress. As such, it will be important to communicate deadlines so you have sufficient time to complete **Evaluations** for your direct reports.

3. **What do I do if one of my employees is unable to complete their Self-Evaluation?**

Please contact your HR representative if this situation happens. Workday does offer the ability to force a dialogue to the next step, as needed and as appropriate but this process is managed by HR.

4. **How can I SEND BACK a dialogue to an employee?**

If an employee needs to make further revisions after they clicked on **Submit** button, you can "**Send Back**" their dialogue. From the **Home** page click on the **Menu** in the upper left-hand corner, then click the **My Team Management** icon. From the **Manager Reports by Category** worklet, select **Performance,** click **My Team's Performance Review**. Under the *Complete* section, locate the dialogue in the *Performance Review* column. Click the … button and then select **Business Process > Manual Send Back**.

5. What if the employee has had a change in managers since the original dialogue was initiated?

If an employee has a new manager in Workday who will be responsible for the completion of the managerial portion of the Performance Dialogue, the HR Partner can send back the dialogue to the employee. The employee can then submit the dialogue and it will route to the new manager for completion.

6. I finished the Evaluation step, now I see the Performance Meeting - To Do step?

Once you have completed your employee's Evaluation, Workday will move to the next step in the process, the **Performance Meeting – To Do**. This is a reminder to schedule your face-to-face dialogue session with your employee.

Important: We recommend that you leave the **To Do** step in your Inbox until after you have met with your employee. Then go back to your Inbox, open the To Do step and then click the **Submit** button. Once you click the Submit button, Workday will route the performance review back to the employee for the next step, the **Final Acknowledgement**. If you click **Submit** before your meeting, the employee will be able to view your comments.

7. How do I share my comments with my employee?

When you are ready, from the **Home** page, click on the **Menu** in the upper left-hand corner, click on the **Team Performance** icon on your homepage, then the click **Printable Reviews** button once will generate a PDF document to be printed or emailed.

8. My manager has always reviewed my direct reports' dialogues before I meet with them. How is this done in Workday?

Your manager is still able to view your direct reports' dialogues, however, it is not a step in the formal performance dialogue process. Instead, they may generate a report **Employee Review by Supervisory Organization.**
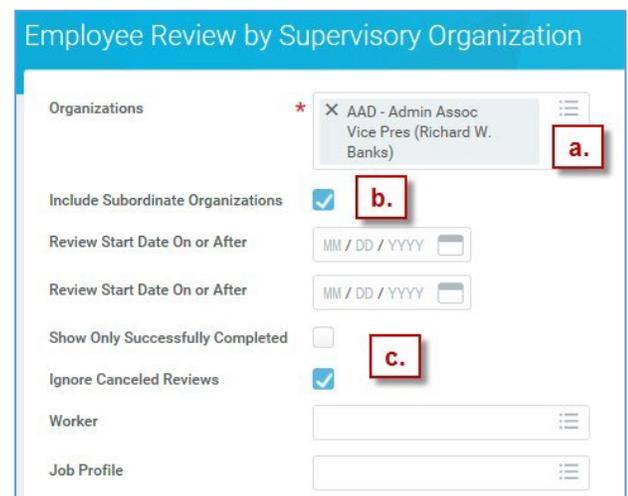
1.
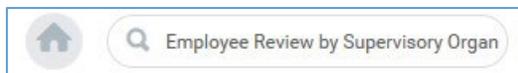
2. Select the organization (a) by typing in the manager's name.
3. If you wish to see all of the employees' dialogues for the whole organization, click on the Include Subordinate Organizations box (b).
4. There are additional options (c) to filter the results, as you wish.

9.   Whose Performance Dialogues can I see as a Manager?

As a Manager you have access to all direct reports in the Organizations where you have the Manager role. Also, if there are subordinate organizations connected to your organization you can see one level down in the hierarchy. For example, one of your direct reports is also a Manager to an organization that is a subordinate to your org. you can see the Performance Dialogues for that person's direct reports (you are the Manager's Manager for these employees). This is as far down the hierarchy that you can see Reviews and/or Goal related data.

10. How can I obtain and print the position description of my employee?

1. In the **Search** field, enter the position number of the employee, press the **Enter** key. The **Search Results** page is displayed. Select the position.
2. Next to the position, click the **Actions** icon.
3. Under **Actions**, select **Position>View Position Restrictions**.
4. Click on the printer icon in the top right corner of the page.

5. Select all of the parts you wish to print, click **Print**.

Goals for Employees and Managers

1. **How do I begin?**

    To view your goals as an employee click on the **Career, Talent & Performance** icon and in the Performance, Check-Ins and Goals section click on **Goals**. To view goals that you have cascaded to your team as a manager click on the **Team Performance** icon and in the View section click on **Goals I've Assigned**. As a manager, to just view the goals for an employee in your organization you can click on the **My Team** icon, then select the name of the employee you want to view, then click on the **Performance** tab, then select **Personal Goals**.

2. **How do I add a goal?**

    To add a new goal as an employee when you are in the **Personal Goals** screen you must first hit the **Edit** button. Once you do this you will then see the **Add** button on your screen.

3. **As a manager how do I create a goal for my team?**

    To create a goal for your team click on the **Performance** icon. Under Action click on the **Add Goal to Employees** button and proceed to fill in the name of the employee or group of employees you want to cascade the goal to as well as enter all of the other goal related fields.

4. **What is the difference between the Personal Goals, Goal Details, and Organizational Goals tabs?**

    • The Personal Goals tab is where all of the goals that you create for yourself, and that your manager creates or cascades to you exist.

    • The Goal Details tab contains all of the basic goal information from the Personal Goals tab in a table-style view.

    • The Organization Goals tab is where goals that are set at the College or Unit level would be viewed.

5. **What is the difference between deleting a goal and marking its status as "On Hold"?**

    When handling a goal that may not be used during a given year there are two options, one is to **Remove** the goal. Doing this would permanently delete the goal from Workday (with no way to recover this information). Another option is to change that goal's Status to **On Hold**. This moves the goal to the bottom of your Personal Goals profile tab where it can be updated in the future.

Where Do I Go For Help?

If you have additional question, please feel free to:

• Access any of the following Workday step-by-step quick reference guides: [Performance Review in Workday](#) and, [Goal Management](#).

• Contact your local HR Representative.