Frequently Asked Questions

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

- **Performance Reviews- For Employees**
- **Performance Reviews- For Managers**
- **Goals (for both Employees and Managers)**
- **Where do I go for Help**

**Performance Reviews - For Employees:**

1. **How do I begin?**
   
   You can access workday via the Workday Website at [http://www.workday.cornell.edu](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** item. You can also begin by clicking on the **Performance** icon on your home page, click on your review in the **My Reviews** section, and then click **Open**.

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 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-handed corner of the screen once the printable PDF is generated.

4. **If I exit the review prior to completion, will it save my information?**
   
   Workday automatically saves your information as you go – 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 Review 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. **Is my position description in Workday and if so, where?**
   
   Cornell is in the process of transitioning position descriptions into Workday, but not all are there as of yet. If your position is in Workday, click Ctrl+N to open a new and then follow these instructions to your position description.
6. **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.

7. **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 spell-checker feature on your internet browser it will denote errors as you type by underlining the word with a red line. You may follow these instructions to enable this feature on your browser, or contact your local IT support team.

8. **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.

9. **Where will my Performance Review be stored?**

   One of the advantages of using Workday is your completed performance reviews are easily accessible by you, your supervisor and HR. Click on the **Performance** worklet on the homepage and then view **My Reviews**.

**Performance Reviews - 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 click on the **Term Performance** icon on your home page and click under View, **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 Review 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 employee’s is unable to complete their Self-Evaluation?**

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

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

   If an employee needs to make further revisions after they clicked on **Submit** button, you can “Send Back” their review, as needed. Click on the **Term Performance** icon on your home page and click under View, **My Team’s Performance Reviews**. Locate the correct review in the Performance Review column and click on the and then select **Business Process > Manual Send Back**.
5. 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.

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

When you are ready, you can 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.

7. My manager has always reviewed my direct reports’ reviews before I meet with them. How is this done in Workday?

Your manager is still able to view your direct reports’ reviews, however, it is not a step in the formal performance review process. Instead, they may generate a report Employee Review by Supervisory Organization.

1. Type the name of the report in the search box located in the upper left-hand corner:

   ![Employee Review by Supervisory Organization](image)

2. Select the organization (a) by typing in the manager’s name.

3. If you wish to see all of the employees’ reviews 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.

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### Goals - For Employees and Managers:

1. **How do I begin?**

   To view your goals as an employee click on the Performance icon and in the View 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 Personal Goals, Goal Details, Organizational Goals, and Archive 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.
   - The Archived Goals tab is where goals that are archived (this action would be done centrally) would be viewable.

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 step-by-step instructions: Performance Review in Workday, Goals in Workday.
- Contact your local HR Representative.