

How a PI or Supervisor Completes an Annual Performance Appraisal for an RFCUNY Employee

1. Log in to Workday using your **ID** and **Password**.
2. After logging in, type in **Performance** in the **Search Bar ❶**, as shown in **Figure 1** below. The **Tasks and Reports** window will open. Under **Tasks and Reports**, click on **Start My Performance Review for Employee ❷** as shown in **Figure 2** below. The **Start Performance Review for Employee** will appear as shown in **Figure 3** on **Page 2**.

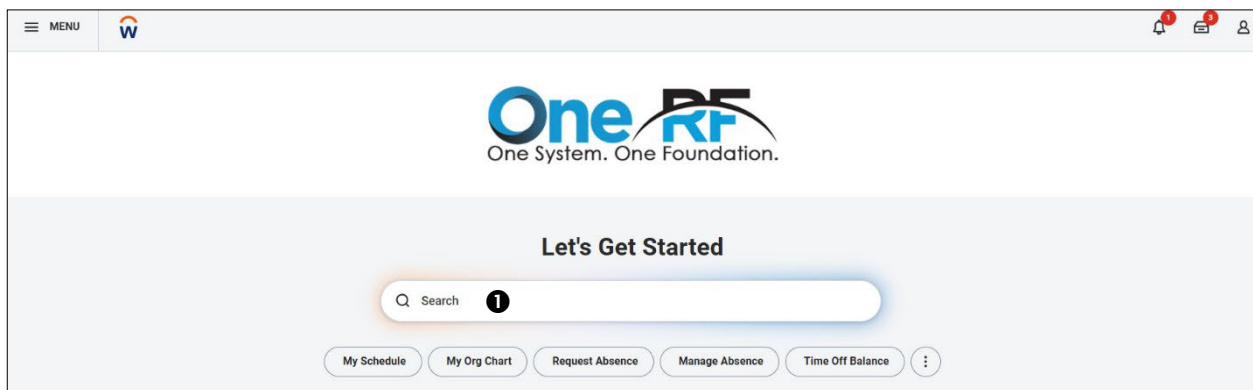


Figure 1

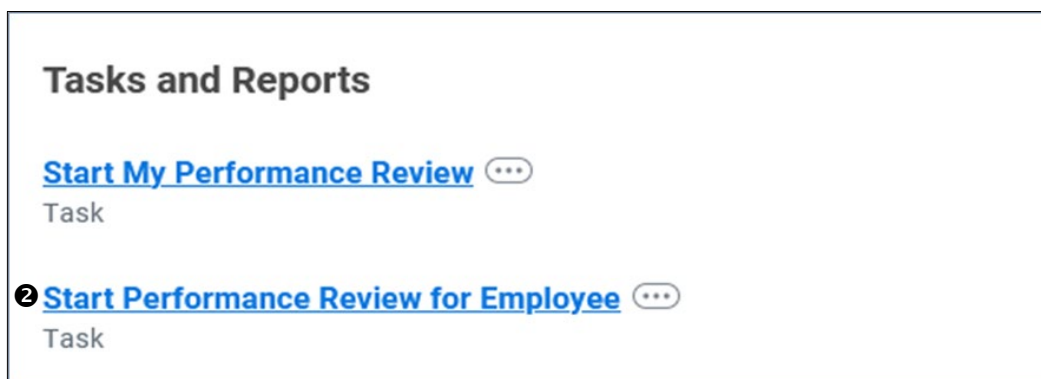


Figure 2

- After you click the **Start My Performance Review for Employee ❶** in **Figure 2, Page 1**, the **Start My Performance Review for Employee** will appear as shown in **Figure 3** below. In the **Employee Box ❶**, type in the employee's name or click on the drop-down menu and select **My Team ❷**. Then select the employee from the list of employees who will be reviewed. Next, in the **Review Template Box ❸** click on the drop-down menu select **Annual Review ❹**, the **RFCUNY Performance Appraisal Button ❺** will appear, and click on the button as shown in **Figure 4** below. Select the **Period Start Date and End Date ❻** in **Figure 3**, which is the period under review. Then click **Submit ❼**.

Figure 3

Figure 4

4. After clicking on **Submit** ⑦ **Figure 3, Page 2**, the **Complete Manager Evaluation** pop-up box will appear, as shown below in **Figure 5**. Click **Open** ①, and **Complete Manager Evaluation Screen** will appear as shown in **Figure 6** below, Read the instructions and click **Get Started** ②.

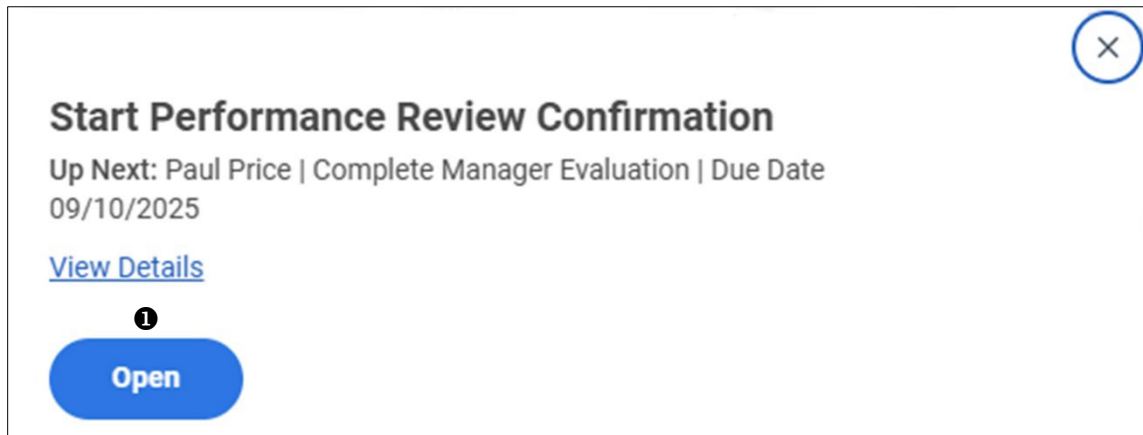


Figure 5

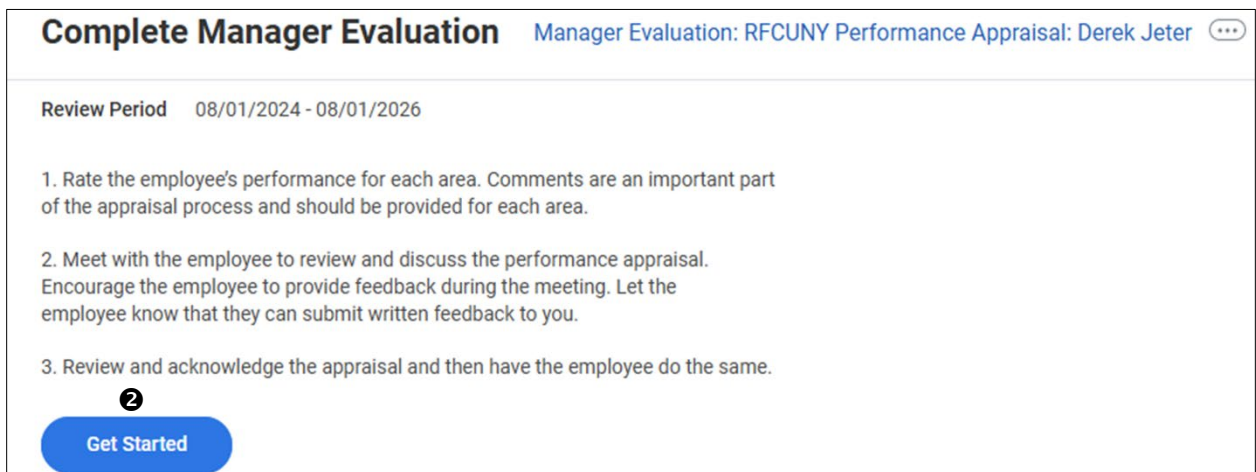


Figure 6

5. After clicking on **Get Started ❶** in **Figure 6, Page 3**, the **Manager's Evaluation Screen** will appear as shown below in **Figure 7**. There are steps that need to be completed that are located on the left-hand side of the screen ❶. They are **Competencies, Time and Attendance, Trainings, Goals, Review, and Submit**. In the **Competencies** section, assign the employee a **Proficiency Rating** using the dropdown menu ❷ and provide comments in the **Comments Box ❸** for all competencies listed. After completing this section, click **Next ❹**.

Please Note: If you click **Actions ❺** on the left side of the screen, the **Event** pop-up box will appear as shown in **Figure 8, Page 5**, showing the status of the performance appraisal.

Complete Manager Evaluation

Manager Evaluation: RFCUNY
Performance Appraisal: Derek Jeter

Actions ❺

08/01/2024 - 08/01/2026

Competencies

Time and Attendance

Trainings

Goals

Review and Submit

Competencies

Rate the employee's performance for each area. Comments are an important part of the appraisal process and should be provided for each area

4 items

Competency	Description	Manager Evaluation
Job Knowledge	This area measures the degree to which the employee demonstrates knowledge of job duties, as well as related policies, procedures, and systems.	Proficiency Rating * ❷ Comment * ❸
Quality & Quantity of Work	This area measures the degree to which the employee takes initiative, regularly produces quality work, manages the expected volume of work, completes tasks in a timely manner, and can be depended on to fulfill job tasks and responsibilities.	Proficiency Rating * Comment *
Supervisory Skills	This area measures the employee's ability to manage other employees in a professional manner to ensure work and performance expectations are met.	Proficiency Rating * Comment *
Collegiality and Customer Service	This area measures the degree to which the employee works with others in the central office and/or field, as well as with any external parties in a collaborative, courteous, and collegial manner.	Proficiency Rating * Comment *

Back

Next ❹

Save

Close

Search

☐ Exceeds Expectations
 ☐ Meets Expectations
 ☐ Needs Improvement
 ☐ Unsatisfactory

Figure 7

Event



Manager Evaluation: RFCUNY Performance Appraisal: Derek Jeter

Subject	RFCUNY Performance Appraisal: Derek Jeter
Overall Status	In Progress
Initiated On	09/03/2025 10:47:10 AM
Due Date	09/10/2025
Effective Date	08/01/2026

Figure 8

Complete the other sections: **Time** and **Attendance**, **Trainings**, and **Goals** using the same format.

- After you complete each section, you will be able to review all your evaluations and either **Submit** or **Save for Later** your evaluations.

7. After submitting your evaluation, **Success! Event submitted** pop-up box will appear as shown in **Figure 9** below. Click **To Do 1** to identify the final step in the review.

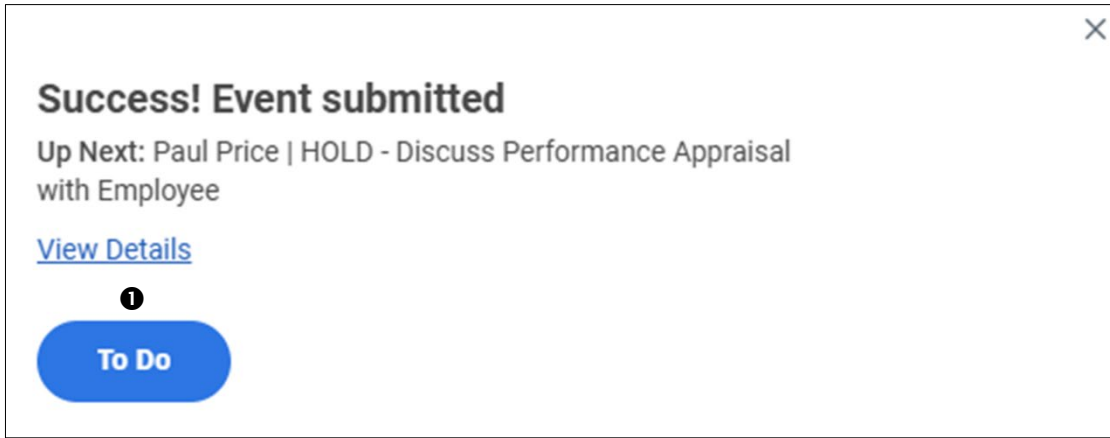


Figure 9

8. After clicking **To Do ①** in **Figure 9 above**, the **Complete to Do Screen** will appear as shown below in **Figure 10**. Click **Save for later ①**. The PI or Supervisor will receive a notification in their **My**
9. **Tasks Box**, see **Figure 11, Page 8**, notifying them to schedule a meeting with their employee to review the appraisal. After meeting with the employee to review the appraisal, return to this section and click **Submit ②**.

Please Note: The appraisal will now be visible to the employee. This action will also send the appraisal to the employee, who will be asked to review and sign the appraisal.

Complete To Do HOLD - Discuss Performance Appraisal with Employee ⋮

For

Derek Jeter

Overall Process

RFCUNY Performance Appraisal: Derek Jeter

Overall Status

In Progress

Instructions

This is a reminder to have a discussion with your direct report about their performance appraisal. Once you press submit below, the performance appraisal will be visible to the employee.

②

Submit

①

Save for Later

Close

Figure 10

10. After the PI or Supervisor clicks **Save for later ❶** in **Figure 10, Page 7**, they will receive a notification in their **My Task Box ❶** to schedule a meeting with the employees to discuss the performance appraisal, as shown in **Figure 11** below. After clicking on the **My Task Box ❶**, the **Task Screen**, will open. Click on the **Performance Appraisal ❷** and click **Save for Later ❸** if you have not met with your employee, but if you have met, click **Submit ❹**. However, you can also see the same task in the **Awaiting Your Action Section** of your Workday home screen, as shown in **Figure 11a**. Click on the **Task ❶** and it will bring you to the task screen, **Figure 11**. Remember, if you meet later with the employee to review the appraisal, you must return to this section and click **Submit ❹**.

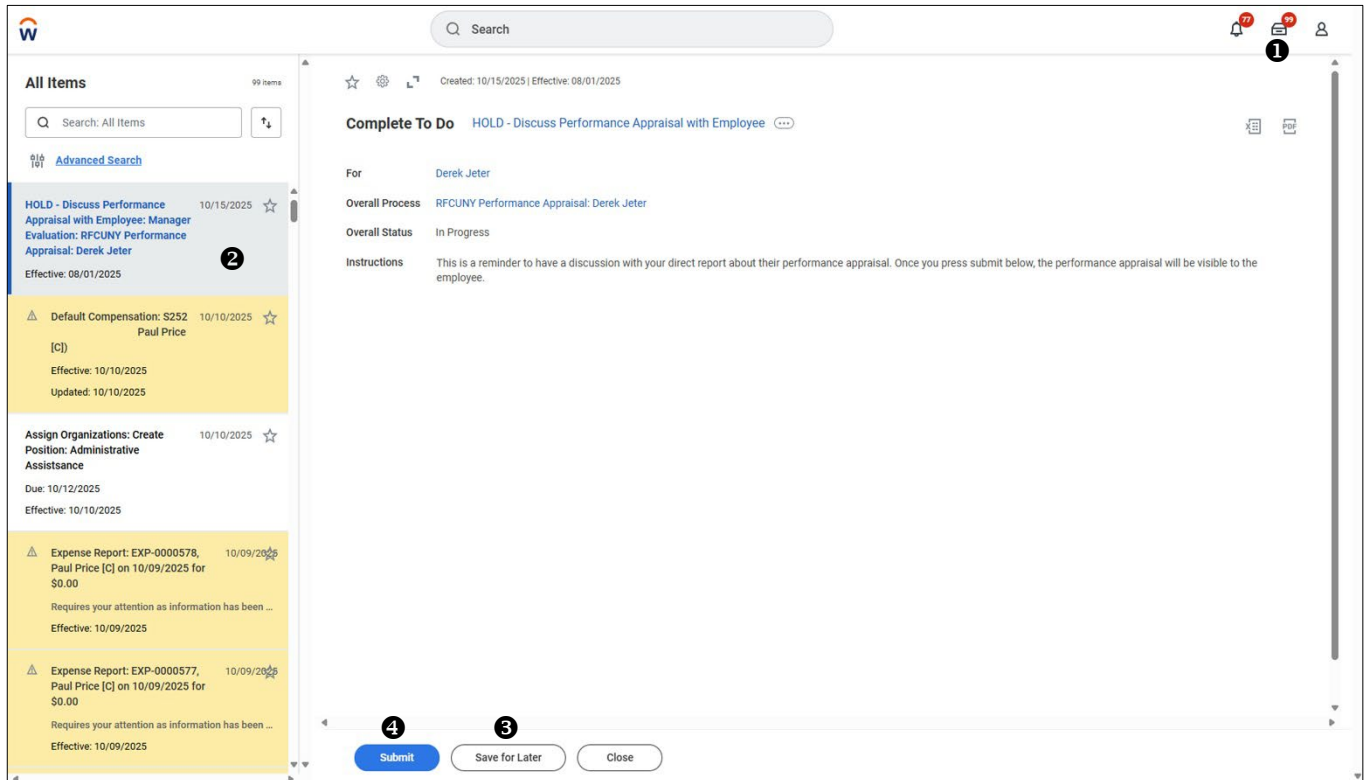


Figure 11

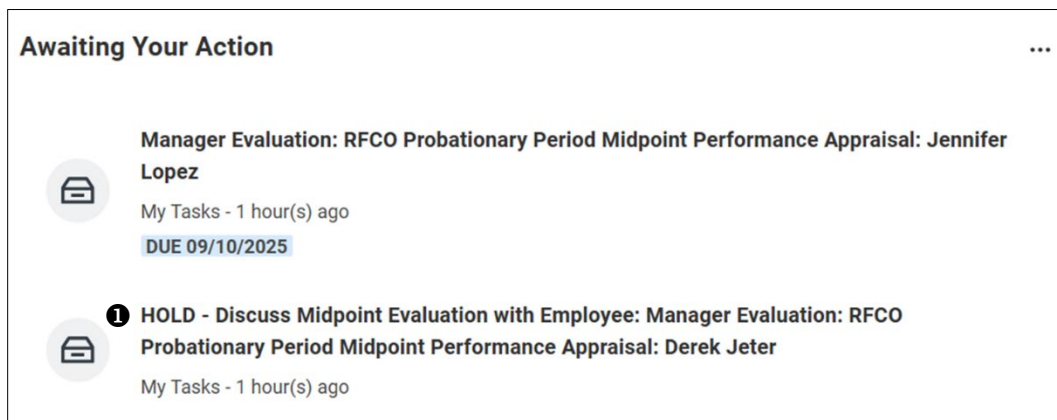


Figure 11a

11. After the PI or Supervisor has met with the employee to review the appraisal, and has clicked **Submit ④**, in **Figure 11**, on **Page 8**, a pop-up box will appear stating **You have marked as Completed** as shown below in **Figure 12**.

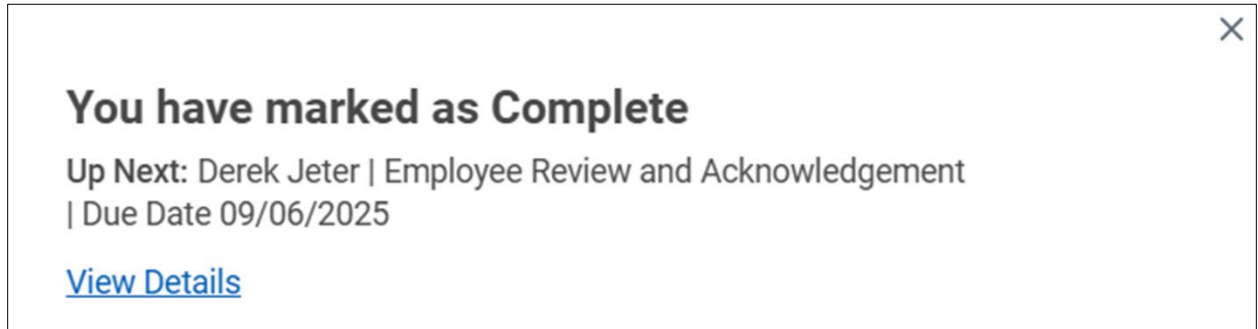


Figure 12

12. Next will be the employee reviewing and acknowledging the performance appraisal. In their **Awaiting Your Action Section** in their Workday home screen, the **Employee Review and Acknowledgement Task** is shown in **Figure 13** below. They will click on **Employee Review and Acknowledgement Task ①**, and they will review and submit their appraisal.

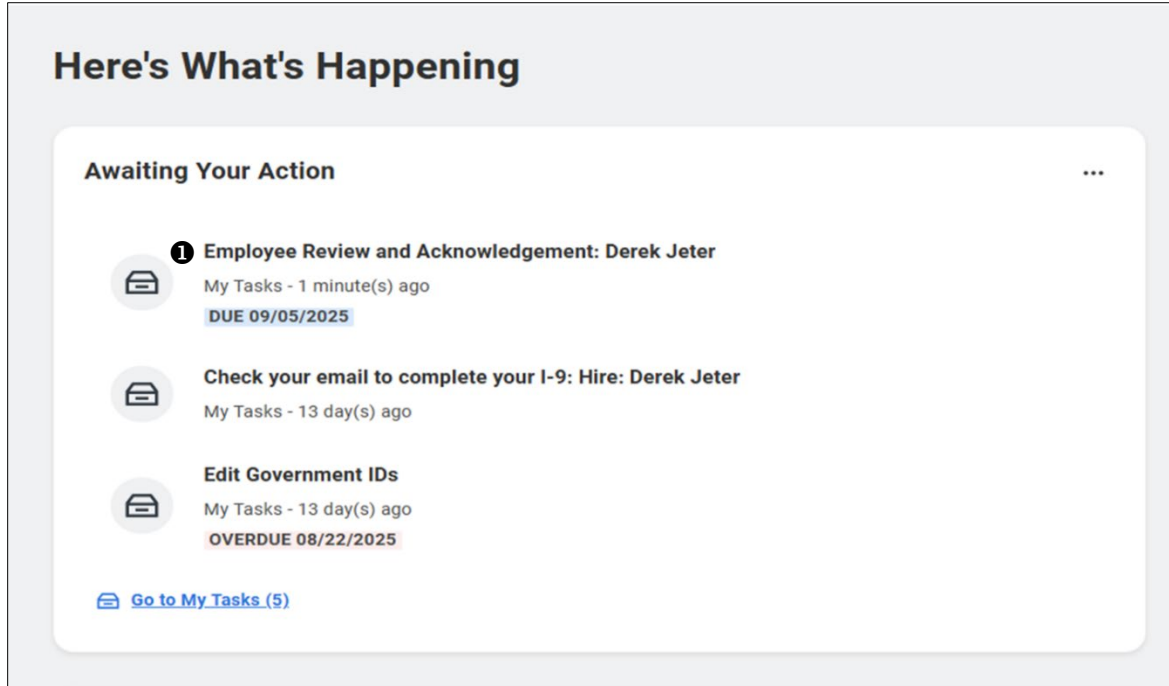


Figure 13

13. After the employee approves and submits their appraisal, the PI or Supervisor will see in their **Awaiting Your Action Section** in their Workday home screen, **Manager Review and Acknowledgement: with the employee's name** as shown in **Figure 14** below. Click **Manager Review and Acknowledgement Task ❶**, and the **Provide Manager Review Comments** screen will open as shown in **Figure 16**, on **Page 11**. Remember, you will also receive a notification in your **My Task Box ❶** to **Provide Manager Review Comments** as shown in **Figure 15** below. You can choose either method.

Click **Get Started ❶** as shown below in **Figure 15**.

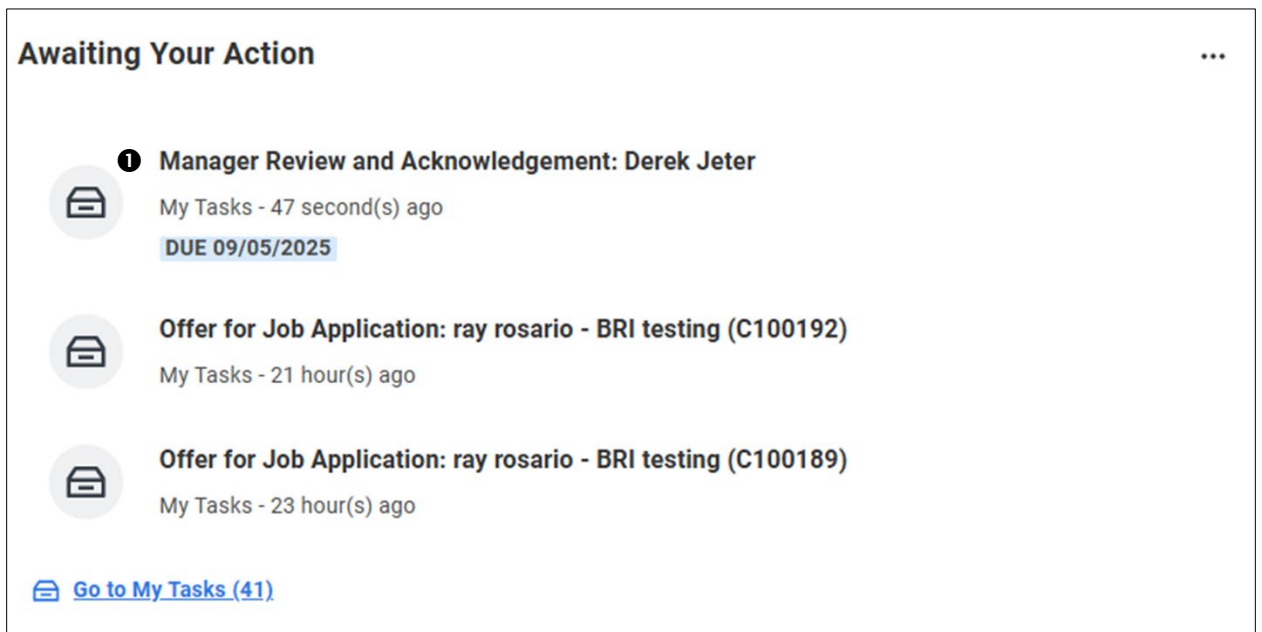


Figure 14



Figure 15

14. After clicking **Get Started 1** in **Figure 15, Page 10**, the appraisal Summary screen will open as shown in **Figure 16**, below. Review the content, click **Next 1**.

Provide Manager Review Comments

Manager Evaluation: RFCUNY
Performance Appraisal: Derek Jeter

Actions

08/01/2024 - 08/01/2026

Evaluated By: Sean McPartl...

Summary

Acknowledgement

Summary

Competencies

4 items

Competency	Description	Manager Evaluation
	This area measures the degree to which the employee demonstrates knowledge of job duties, as well as related policies, procedures, and systems.	Proficiency Rating Meets Expectations Performance meets job requirements. Comment Meets Requirements
Quality & Quantity of Work	This area measures the degree to which the employee takes initiative, regularly produces quality work, manages the expected volume of work, completes tasks in a timely manner, and can be depended on to fulfill job tasks and responsibilities.	Proficiency Rating Meets Expectations Performance meets job requirements. Comment Meets requirements
Supervisory Skills	This area measures the employee's ability to manage other employees in a professional manner to ensure work and performance expectations are met.	Proficiency Rating Meets Expectations Performance meets job requirements. Comment Meets Requirements
Collegiality and Customer Service	This area measures the degree to which the employee works with others in the central office and/or field, as well as with any external parties	Proficiency Rating Meets Expectations

1

BackNextClose

Figure 16

15. After clicking **Next ❶** in **Figure 16, Page 11**, the **Acknowledgement Screen** will appear as shown in **Figure 17** below. Click on the **Drop-Down Menu ❷** in the **Status Box ❶**, and the **Acknowledge Button ❷** will appear, and click on the button. Add any comments in the **Comment Box ❸**. Click **Submit ❹**.

Provide Manager Review Comments

Manager Evaluation: RFCUNY
Performance Appraisal: Derek Jeter

Actions

08/01/2024 - 08/01/2026
Evaluated By: Sean McPartl...

Summary

Acknowledgement

Acknowledgement

Manager

Status * Search ❶

Comment Acknowledge Review ❷

Comment Box ❸

Employee

Status Acknowledge Review

Comment

Acknowledged By Derek Jeter

Acknowledgement Date 09/03/2025 12:41 PM

Process History

- Paul Price [C] Complete Manager Evaluation for Performance Review– Submitted Due 09/10/2025
- To Do: HOLD - Discuss Midpoint Evaluation with Employee– Not Required
- Paul Price [C] To Do: HOLD - Discuss Performance Appraisal with Employee– Step Completed 46 minutes ago
- Derek Jeter Employee Review and Acknowledgement– Submitted Due 09/05/2025
- Paul Price [C] Manager Review and Acknowledgement– Awaiting Action Due 09/05/2025

Submit ❹ Save for Later

Figure 17

16. After clicking **Submit ❹** in **Figure 17**, above the **Success! Event Submitted** pop-up box will appear as shown in **Figure 18** below. The appraisal process is complete.

Success! Event submitted

[View Details](#)

Figure 18