

Complete Manager Review

This guide shows you how to complete a performance evaluation for your direct reports in Workday. You will learn how to access the task, review the employee's self-evaluation, provide your own ratings and comments, submit the evaluation for approval, and acknowledge the review after the discussion.

Who is this for: People Managers

Time to complete: 10 to 15 minutes

Before You Start

- You have an active Workday account and are logged into Workday
- Your employee has submitted their self-evaluation (you will receive a task once they do)
- Review the employee's goals, check-in notes, feedback received, and any relevant documentation before starting

How the Performance Review Works

Steps	What Happens
Employee	Completes self-evaluation with ratings and comments
Manager	Reviews self-evaluation and completes manager evaluation with ratings and comments
Manager & Employee	Meet to discuss the review and overall rating
Employee	Acknowledges the review and adds any final comments

Accessing and Starting the Manager Evaluation

STEP 1:

Once your employee submits their self-evaluation, you will receive a task:

1. Check the **"Awaiting Your Action"** card on your homepage or open **My Tasks** (tray icon in the top right)
2. Locate and click on the task titled **"Manager Evaluation"** for the employee
3. Click **Get Started** to start the Manager Evaluation

All Items 22 items

Search: All Items

Advanced Search

Manager Evaluation: 2026 Annual Review: 07/07/2026 ☆

Effective: 12/31/2026

Benefit Change - Location Change, and New Hire : 07/06/2026 ☆

on 07/06/2026

Effective: 07/06/2026

Benefit Change - Location Change, and New Hire - Acquisition : 07/06/2026 ☆

on 06/30/2026

Effective: 06/30/2026

Business Process Definition Error for Regenerate Offer Documents 07/06/2026 ☆

Give Feedback: 07/06/2026 ☆

Created: 07/07/2026 | Effective: 12/31/2026

Complete Manager Evaluation

Manager Evaluation: 2026 Annual Review:

Review Period 01/01/2026 - 12/31/2026

Provide a balanced review of the employee's performance over the past year. reflect results and how the work was performed and support a constructive performance discussion.

Get Started

Accessing and Starting the Manager Evaluation

STEP 2:

Choose how to complete the evaluation:

1. The **Complete Manager Evaluation** screen will display
2. Go through the **Guided Editor** and walk through each section one at a time with the employee's self-evaluation visible alongside your evaluation

Complete Manager Evaluation

Manager Evaluation: 2026
Annual Review:

Actions

01/01/2026 - 12/31/2026

-  Current Year Goals
-  Achievements
-  Development
-  Overall
-  Next Year Goals
-  Review and Submit

Completing the Manager Evaluation

STEP 3:

Work through each section of the evaluation:

1. **Current Year Goals:** Review the employee's goals for the year. Rate their progress on each goal and add comments describing their achievements, outcomes, and any challenges faced (Screenshot attached below)
2. **Achievements:** Highlight the employee's key accomplishments from the year. Focus on results, impact, and how their work supports your team or the business (Screenshot attached below)

Current Year Goals

Assess progress against goals, focusing on outcomes, impact, consistency, and any factors that influenced results.

Goal

Normal

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Deliver effective HR support and improve the employee experience.

Description

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Support key HR processes with timely execution, clear communication, and consistent follow-through aligned with team and business priorities.

Due Date

MM / DD / YYYY

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Track By

Percent

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Achievements

Highlight the employee's most impactful achievements. Focus on results, impact, and alignment to role expectations and business needs.

Accomplishment

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Successfully supported HR operations and employee-related initiatives through timely coordination, effective stakeholder communication, and consistent execution of assigned responsibilities.

Manager

Comment

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The employee demonstrated strong ownership and reliability throughout the year. Their contributions supported smooth HR operations, timely completion of activities, and a positive employee experience.

Remove

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Completing the Manager Evaluation

STEP 4:

Work through each section of the evaluation:

1. **Development:** Identify areas for growth to further strengthen their effectiveness. Include skills, behaviors, or ways of working you want them to develop, along with any feedback they have received
2. **Overall:** Provide an overall assessment of performance, including results, consistency, and impact. Align the rating to role expectations and briefly explain why, using key examples

Development

Identify areas for continued growth to strengthen effectiveness. Include development priorities as well as any feedback to support ongoing improvement. This may include skills or behaviors to strengthen over time.

Development Item

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Strengthen stakeholder communication an

Additional Information

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Continue developing the ability to use HR insights, employee feedback, and process data to support better decisions and improve the employee experience.

Status

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In Progress

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Status Note

Ongoing development through regular feedback, collaboration with stakeholders, and application of learnings in day-to-day HR activities.

Start Date

MM / DD / YYYY

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Completion Date

MM / DD / YYYY

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Overall

Provide an overall assessment of performance, including results, consistency, and impact. Align the rating to role expectations and briefly explain why, using key examples.

Rating guidance:

- 1 – Below Expectations:** Performance consistently did not meet role expectations. Key goals and responsibilities were not achieved, and improvement is needed despite feedback or support.
- 2 – Development Needed:** Performance met some expectations but showed gaps in consistency, results, or role readiness. The employee may still be developing into the role, responsibilities, or level of complexity, and improvement is needed to fully meet expectations.
- 3 – Consistently Successful:** Performance consistently met role expectations. Goals and responsibilities were achieved, with reliable results, and at time performance may have exceeded expectations.
- 4 – Exceptional Impact:** Performance consistently exceeded role expectations in a meaningful and sustained way. Delivered strong, results, and demonstrated significant impact beyond the scope of the role, standing out among peers.

Manager

Rating

3 - Consistently Successful

Rating Description

Performance consistently met role expectations. Goals and responsibilities were achieved, with reliable results, and at time performance may have exceeded expectations.

Comment

Normal

The employee consistently met role expectations and delivered assigned responsibilities with professionalism and reliability. They contributed positively to HR processes, supported employee needs effectively, and demonstrated a strong commitment to team and business priorities.

Completing the Manager Evaluation

STEP 5:

Work through the **Next Year Goals** section outlining their priorities for the coming year. What can they focus on, and what does success look like?

Next Year Goals

Outline goals and priorities for the coming year. Ensure goals are clear, role-appropriate, and aligned with team and business objectives and reflect both performance expectations and opportunities for growth.

Goal

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Enhance HR service delivery and employee experience.

Description

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Focus on improving process efficiency, timely employee support, and consistent execution of HR initiatives aligned with business and team priorities.

Due Date

MM / DD / YYYY

Category

Status

Not Started

Track By

Percent

Minimum Percent

0

Target Percent

100

Completing the Manager Evaluation

STEP 6:

Review and submit:

1. After completing all sections, you will see a **Review and Submit** page with the **Overall performance** rating and all your ratings and comments. Review everything carefully before submitting

Click **Submit** to send the evaluation for approval. If you need more time, click **Save for Later** to return to it

Overall		 	
Manager			
Rating	3 - Consistently Successful		
Rating Description	Performance consistently met role expectations. Goals and responsibilities were achieved, with reliable results, and at time performance may have exceeded expectations.		
Comment	The employee consistently met role expectations and delivered assigned responsibilities with professionalism and reliability. They contributed positively to HR processes, supported employee needs effectively, and demonstrated a strong commitment to team and business priorities.		

Next Year Goals		 	
Goal	Enhance HR service delivery and employee experience.		
Description	Focus on improving process efficiency, timely employee support, and consistent execution of HR initiatives aligned with business and team priorities.		
Due Date	(empty)	Track By	Percent
Category	(empty)	Minimum Percent	0.00%
Status	Not Started	Target Percent	100.00%

Note - HR Partner Approval Required for Low Ratings

If the overall rating is a 1 or 2, the review does not go straight to the employee. It first routes to your HR Partner for approval and is shared with the employee only after they approve it. Routing happens automatically once you submit.

Do not discuss the review with the employee until the HR Partner has approved it.

Conducting the Review Discussion & Acknowledging

STEP 7:

After the evaluation is approved, you will receive a To-Do task to meet with the employee:

1. Schedule and conduct the performance review discussion with the employee
2. Share the evaluation with the employee during the conversation. You can make the review visible to them by clicking on the link in the To-Do task
3. Discuss ratings, feedback, accomplishments, development areas, and goals for the coming year
4. Once the discussion is complete, return to the To-Do task and click **Submit** to confirm the discussion took place

The screenshot displays a software interface with two main panels. The left panel, titled 'All Items' with a '22 items' count, contains a search bar and a list of tasks. The right panel shows a detailed view of a selected task, 'Complete To Do', with a blue link 'Have 1:1 conversation with employee' and a three-dot menu. The task details include a 'For' field, 'Overall Process' (2026 Annual Review), 'Overall Status' (In Progress), and 'Instructions'. At the bottom of the right panel, there are three buttons: 'Submit' (highlighted with a red box), 'Save for Later', and 'Close'.

All Items 22 items

Search: All Items

Advanced Search

Have 1:1 conversation with employee: Manager Evaluation: 2026 Annual Review: 07/07/2026 ☆

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on 07/06/2026

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Benefit Change - Location Change, and New Hire - Acquisition : 07/06/2026 ☆

on 06/30/2026

Effective: 06/30/2026

Business Process Definition Error for Regenerate Offer Documents 07/06/2026 ☆

Give Feedback: 07/06/2026 ☆

Complete To Do [Have 1:1 conversation with employee](#) ...

Created: 07/07/2026 | Effective: 12/31/2026

For [Redacted]

Overall Process 2026 Annual Review: [Redacted]

Overall Status In Progress

Instructions Please contact the worker and have the discussion with them prior to Submitting this To Do step. The details contained in the PIP will be visible for the worker to see once the To Do step has been submitted.

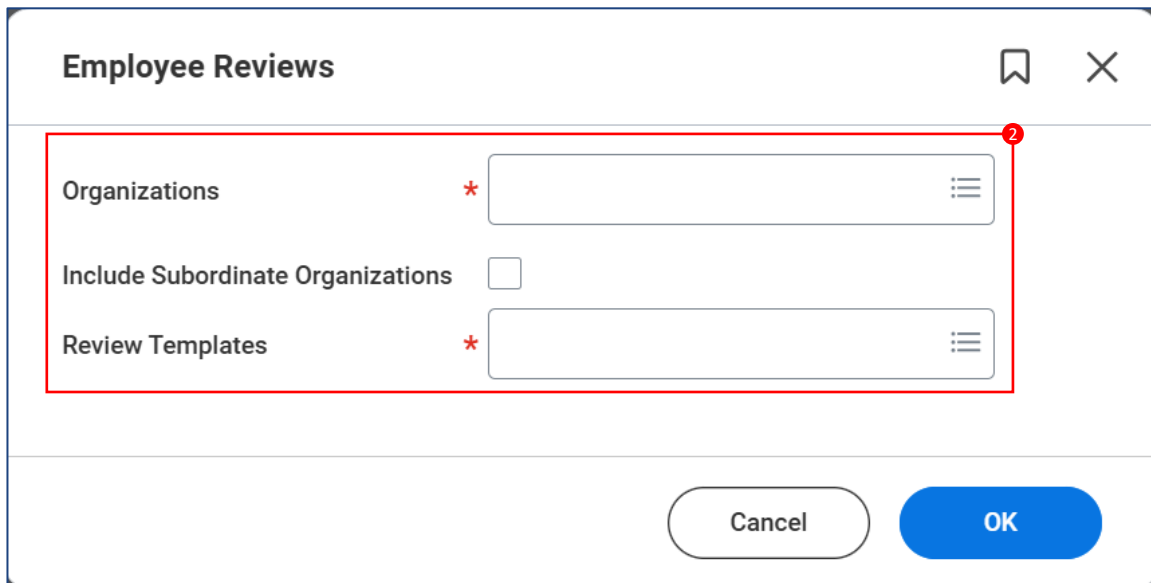
Submit **Save for Later** **Close**

Conducting the Review Discussion & Acknowledging

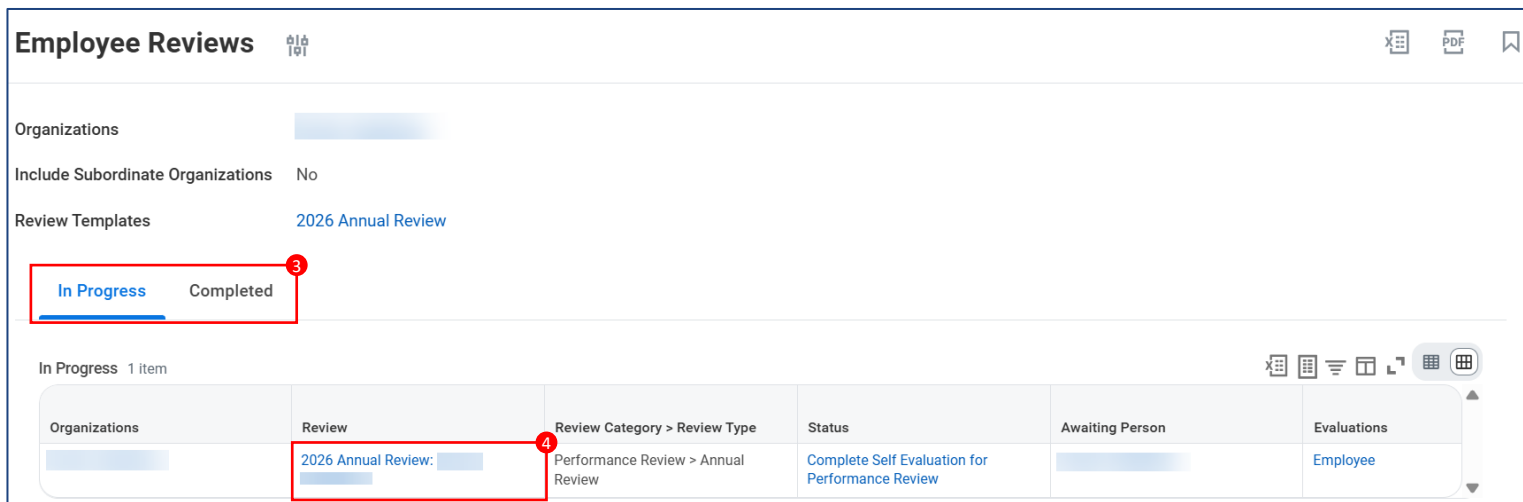
STEP 8:

After the employee acknowledges the review, you can check the status in the **Employees Review** Section:

1. Open the “**Employees Reviews**” Section by searching in the Search Bar
2. Select the **Organizations** and **Review Templates**
3. Under **Completed/In-Progress**, you can see the review status and whether it has been acknowledged by the employee or not
4. You can click the process to see further details if needed



The dialog box titled "Employee Reviews" contains three input fields: "Organizations", "Include Subordinate Organizations" (a checkbox), and "Review Templates". The "Organizations" and "Review Templates" fields are marked with a red asterisk. A red box highlights these three fields, with a red circle containing the number "2" pointing to the top right corner of the box. At the bottom of the dialog are "Cancel" and "OK" buttons.



The main interface shows the "Employee Reviews" section with filters for "Organizations", "Include Subordinate Organizations" (set to "No"), and "Review Templates" (set to "2026 Annual Review"). Below these are tabs for "In Progress" and "Completed", with "In Progress" selected. A red box highlights these tabs, with a red circle containing the number "3" pointing to the top right corner of the box. Below the tabs, it says "In Progress 1 item". A table displays the review details:

Organizations	Review	Review Category > Review Type	Status	Awaiting Person	Evaluations
	2026 Annual Review:	Performance Review > Annual Review	Complete Self Evaluation for Performance Review		Employee

A red box highlights the "Review" column, with a red circle containing the number "4" pointing to the top right corner of the box.

References

Key Things to Know

- You can view the employee's self-evaluation while completing your evaluation. Use it to understand their perspective, but base your ratings on observed performance and outcomes.
- Be specific and evidence-based in your comments. Avoid subjective or style-based language. Reference goals, check-in notes, and documented feedback.
- The overall performance rating is calculated as an average of your individual ratings. Review it carefully before submitting.
- You can view past evaluations for your team anytime from the My Team section in Workday.

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.