Annual Performance Appraisal Timeline
FY23 (July 1, 2022 – June 30, 2023)

June 05, 2023:   Each employee will receive a self-evaluation in their Workday Inbox

July 07, 2023:   Self-evaluations should be completed and submitted.

July 28, 2023:   Supervisor's portion should be completed and submitted by the immediate supervisor.

August 11, 2023:   Review process by higher level supervisor and the additional reviewer* should be completed and submitted.

> *At the discretion of the Dean, Director, Vice President or his/her designee an additional reviewer can be added. This must occur BEFORE the higher level supervisor approves/submits the review.*

August 25, 2023:   Immediate supervisor completes Workday To Do by meeting with employee to discuss the appraisal;
                         AND
                         Employee acknowledges in Workday that they met with their immediate supervisor to discuss the appraisal.

Job Aids are in Workday

Performance Appraisal – Self-Evaluation	Performance Appraisal – Supervisor Evaluation
Performance Appraisal Status Report	Updating Goals
Performance Appraisal – Instructions To Add an Additional Approver	

If you have any questions, please do not hesitate to contact:
Ana Guerin, Employee Relations & Development Manager
(561) 297-3072 or aguerin2@fau.edu

FLORIDA ATLANTIC UNIVERSITY

Annual Performance Appraisal Process
FY23 (July 1, 2022 – June 30, 2023)

We are excited to kick off the performance appraisal process for all AMP and SP employees, for work completed in FY23 (July 1, 2022 - June 30, 2023). **Please note that all work completed after July 1, 2023, should be included in the performance appraisal for next year, FY24.**

The following are the steps to complete the performance appraisal process. Note that all notifications will appear in your WD Inbox:

Each employee will receive a self-evaluation in their WD Inbox on *June 5, 2023*. Self-evaluations should be completed and submitted **by July 7, 2023.**

The immediate supervisor will receive the employees' self-evaluation and complete the supervisor's portion by **July 28, 2023**.

The higher-level supervisor will then receive the appraisal to review. *At the discretion of the Dean, Director, Vice President or his/her designee an additional reviewer can be added. The additional reviewer can only be added BEFORE the higher-level supervisor approves/ submits the review.* This review process should be completed by **August 11, 2023**.

Once the appraisal is approved, the immediate supervisor will receive a "To Do" to schedule the meeting with the employee. After the meeting, the supervisor will release the appraisal back to the employee. The meeting should be held by **August 25, 2023**.

The final step is for the employee to acknowledge, in Workday, that they had the appraisal discussion with the supervisor. This final step should be completed **no later than August 25, 2023.**

All Job Aids are in Workday.
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Employee Relations & Development Manager
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Performance Appraisal FY23
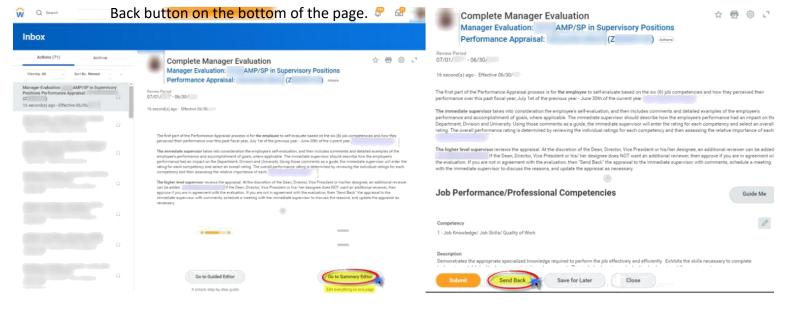## Frequently Asked Questions

1. **When are the performance appraisals due?**

   Please follow the timeline sent out by the Department of Human Resources:

   - Self-evaluations are due by July 7, 2023
   - Supervisor evaluations are due by July 28, 2023
   - Review by higher level supervisor due by August 11, 2023*
     - *This timeframe includes time for Dean, Director, VP or his/her designee to review*
   - Supervisor meets with employee to discuss appraisal by August 25, 2023
   - Employee acknowledges they met with supervisor via Workday by August 28, 2023

2. **I accidently submitted my self-evaluation to my supervisor; how do I retrieve it so I may complete my self-evaluation?**

   Inform your supervisor that you accidently submitted your appraisal prematurely. Ask your supervisor to send back your appraisal. Your supervisor can accomplish this task by opening the appraisal in their Workday Inbox via the Summary Editor, and then by clicking the Send Back button on the bottom of the page.

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3. How do I input Last Year's Goals?

Your Last Year's Goal should have already populated from your appraisal last year. You will need to update the status of the goal and update any comments.

4. How do I reassign a performance appraisal?

If you were not the supervisor of the employee during the Performance Appraisal period (July 1, 2022 – June 30, 2023, then you may reassign the supervisor portion of the appraisal. To reassign the evaluation, click on the settings icon on the Inbox Task, and reassign to the appropriate person. Please see number 2 on page 1 of the "Performance Appraisal – Supervisor Evaluation" Job Aid in Workday. *(NOTE: New supervisor and employee should meet to discuss Next Year's Goals – May meet in addition to Performance Appraisal meeting, such as during one-on-one meeting)*

If you were the supervisor for the later portion of the Performance Appraisal period (July 1, 2022– June 30, 2023), then you should collaborate with the previous supervisor to assist you in evaluating the employee during the July 1, 2022 – June 30, 2023 time period the employee was not under your supervision. However, you would **NOT** reassign to the previous supervisor, since you are their current supervisor and were their supervisor during the later portion of their Performance Appraisal period.

If your subordinate reports to you, but also works with other supervisors, then you should collaborate with the other supervisors to receive their input from the tasks the employee completes/ works on for them. This will assist you in providing a detailed and effective evaluation.

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5. **The Dean, Director, Vice President, Chief of Police or his/her designee has requested to view all performance appraisals before they are submitted; how do I add them as an additional reviewer?**

   At the discretion of the Dean, Director, Vice President, Chief of Police or his/her designee an additional reviewer can be added. The additional reviewer can only be added <u>BEFORE</u> the higher level supervisor approves/submits the performance appraisal. To add an additional reviewer, select the More dropdown button at the end of the appraisal. Then select Add Approvers, type the name of the additional reviewer you are adding, type your comment stating that you are sending the performance appraisal to them for additional review, and click submit. (See: "Performance Appraisal – Instructions To Add an Additional Approver" Job Aid in Workday).

6. **The Overall Rating is missing when I print my employee's performance appraisal, how do I get it to appear on the printed version?**

   To have the Overall Rating appear on the printed version of the employee's performance appraisal for the meeting with the employee to discuss the performance appraisal, press the submit button on the To Do Task of meeting with the employee.

   CAUTION: The performance appraisal is released to the employee once you press submit. Wait until you are about to meet with the employee, or have the employee in your office for the meeting to press this button and print the appraisal, especially if you are placing the employee on a Performance Improvement Plan ("PIP") with an Overall Rating of "Needs Improvement (2)" or "Unsatisfactory (1)". Employees shall only be notified that they are receiving a PIP by the supervisor when they discuss their performance appraisal.

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7. How can I check on the status of performance appraisals for the employees in my management chain or as a Business Manager/HR Partner?

If you are a **Business Manager/ HR Partner**, then you have the ability to check the status of employee performance appraisals in your area. You will be able to see which step the performance appraisal is at, and who it is sitting with. You will NOT be able to see the content of the performance appraisals or the ratings. ONLY those in the management chain can see content and ratings.

To run the report, first search for "FAU_HCM_Performance Review Status Report" in the Workday search bar. The report is ready to run, so press the "OK" button.

If you are in the **management chain**, you may use "Employee Review Summary" or "My Team's Performance Reviews" to see more detailed information about the performance appraisals.

Please see the Performance Appraisal Status Report Job Aid in Workday for specific instructions and pictures.

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