



Initiate Ad Hoc Performance Review (Manager)

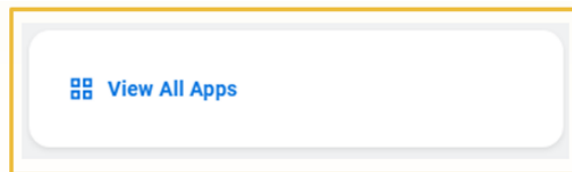
Overview

This job aid outlines the process of starting a performance review in Workday from the role of a manager.

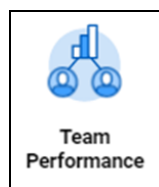
Initiate Start Performance Review

Security Role(s): Managers, Talent Administrator, Talent Partner, Talent Pool Manager

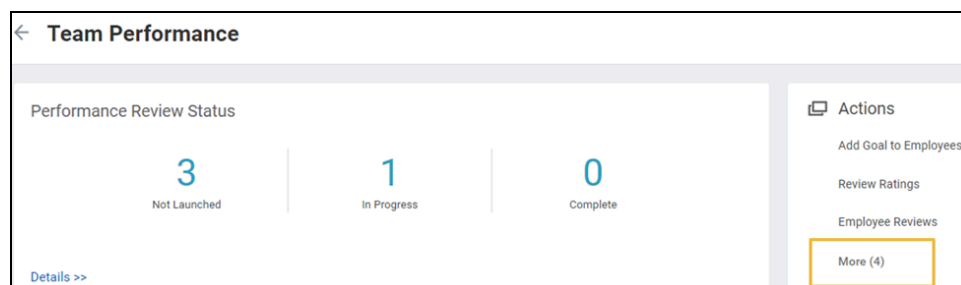
1. From the Workday Landing Page, select **View All Apps**.



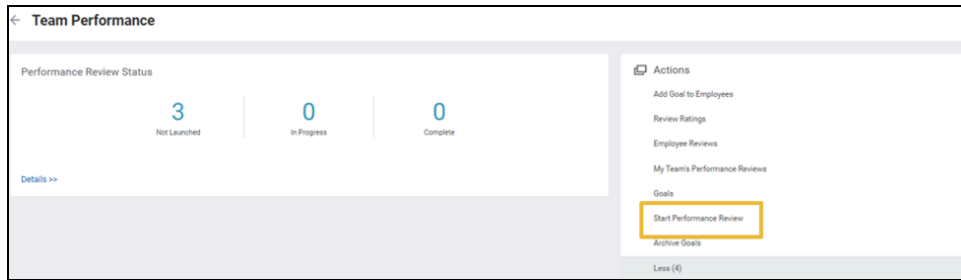
2. Select the **Team Performance** application.



3. The application shows you the details of aspects related to your team performance. In the left column, you can see that the Performance Review Status displays 3 Not Launched. Select the **More** link on the right to view all Actions.



4. Now you can select the **Start Performance Review** action.



5. Enter the following details:

- Employee** – Use the menu, or simply type the name of the employee in the field.
- Review Template** – You have the option to choose from a Goal Setting template or the Annual Review template for the appropriate year(s). This job aid will follow the **Annual Review** process.
- Period Start Date** – will default when the Annual Review template is selected
- Period End Date** – will default when the Annual Review template is selected

Select **Submit**.

The screenshot shows a form titled 'Start Performance Review for Employee'. It has four main input fields, each with a red asterisk indicating it is required. The first field is 'Employee', the second is 'Review Template', the third is 'Period Start Date', and the fourth is 'Period End Date'. Each date field includes a calendar icon. To the right of each field is a yellow circle with a letter: 'A' for Employee, 'B' for Review Template, 'C' for Period Start Date, and 'D' for Period End Date. The form also features a 'W' logo in the top left corner.

Remaining Process

The process will route to the employee's inbox to complete their Self Evaluation.