




Note: These instructions all assume you're accessing the various steps in the performance process from your

Workday **Inbox** by clicking on the Inbox  at the upper right hand corner of your screen.

## Getting Started with Performance Management

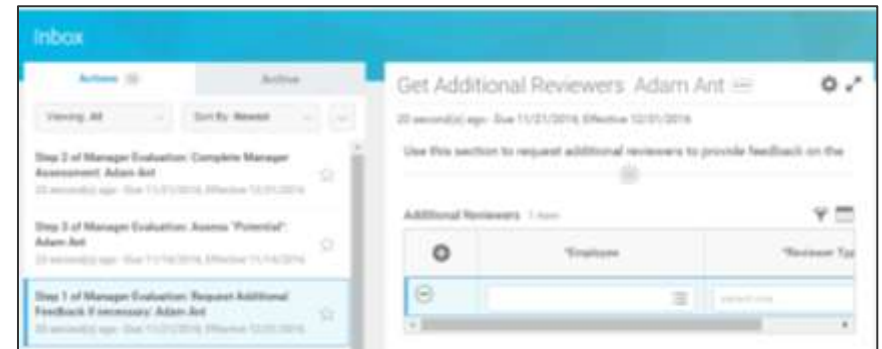
For a leader at NYP, the performance management process will work as follows:

1. Complete your own **Self-Assessment**. (see *Performance Management: Complete My Self-Assessment* for instructions).
2. **Request Additional Reviewers** for your employees. This step is optional except where a Matrix Manager exists.
3. Complete your **Manager Evaluation** for each of your employees.
4. Hold one-on-one meetings with each employee to review his/her performance & send the review to the employee for acknowledgement.
5. When your employee signs off, you will get an inbox notification to do final acknowledgement and complete the process.

## Request Additional Reviewers

When the employee completes his/her self-evaluation, you will receive two Workday **Inbox** items, one of which is the "Request Additional Reviewers" notification. *This is an optional step, but should be used when the employee has a **matrix manager**.*

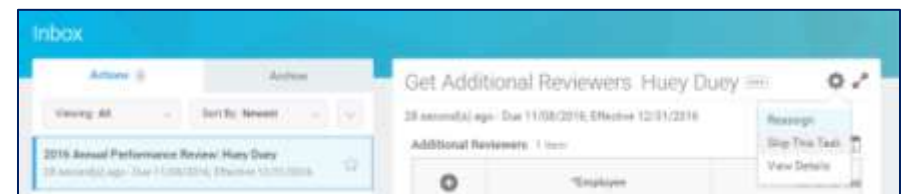
1. Find the item that reads **(Optional) Request Additional Feedback for Performance Review: [Employee Name]** and click on it.



2. Type all or part of the additional reviewer's name into the \*Employee field to search for them by name.
3. Select the additional Reviewer Type from the Reviewer Type drop down box. Your options are Peer, Direct Report, Matrix Manager and Other.
4. To add additional reviewers click on the "+" sign and repeat the steps above.
5. This will trigger a Review Step. Click **Open** to review, then **Submit** and, finally, **Done** to return to your Inbox.

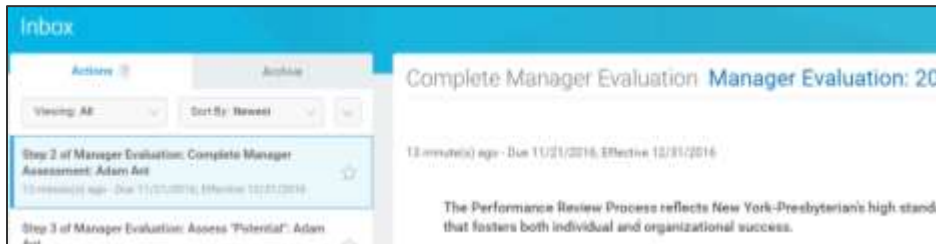
## TO SKIP THIS STEP:

Click on the gear icon , then select **SKIP THIS TASK**



## Manager Evaluation


1. Find the item that reads **Manager Evaluation: Complete Manager Assessment: [Employee Name]** and click on it.



2. Select either the **Go to Guided Editor** button or the **Go to Summary Editor** button.
  - a. The **Guided Editor** will walk you through the evaluation section by section (and save each time you hit “Next”).
  - b. The **Summary Editor** will bring all sections up as one long page. *The remaining instructions will assume that you are using the **Guided Editor**.*

### Section 1: Goals

The first section contains your employee’s current year performance goals. If they had goals for this year in our former system, they will be loaded here.


1. Click the **Edit** icon  to update your progress against any pre-loaded goals. Make sure to validate the **Status** of each item and your **Rating** of the employee’s performance against this goal in the appropriate drop down boxes.
2. Click the **Add** button to add any goals that you feel are missing, or that you’d like to consider as part of the performance review. Once again, make sure to indicate the **Status** of each item and your

**Rating** of the employee’s performance against this goal in the appropriate drop down boxes.

3. Click the **Next** button to save your progress and move to the next section.


### Section 2: NYP Culture

In this section you’ll evaluate your employee’s performance against NYP’s Cultural Competencies (Respect, Teamwork, Excellence, Responsibility, Empathy and Innovation). You will select only 1 rating in this section.

1. Click on the **Edit** icon  to select your employee’s proficiency rating NYP’s Cultural competencies.
2. The text box allows you to provide specific examples of how the employee demonstrates each value.
3. When you have completed this section, click the **Next** button to save your progress and move to the next section.


### Section 3: NYP Core Competencies

In this section you’ll evaluate your employee’s performance against NYP’s Core Competencies (Communicates Effectively, Drives Engagement, Ensures Accountability, Customer Focus and Instills Trust).

1. Click on the **Edit** icon  to select your worker’s proficiency rating on each of NYP’s Core Competencies.
2. Once again, use the text box to provide specific examples of how the employee demonstrates each value.
3. When you have completed this section, click the **Next** button to save your progress and move to the next section.



### Section 4: Individual and Leadership Competencies

In this section, you'll evaluate your employee's performance against competencies specific to their level in the organization.

1. Click on the **Edit** icon  to select the employee's proficiency rating on each competency.
2. Once again, use the text box to provide specific examples of how they demonstrate each value.
3. When you have completed this section, click the **Next** button to save your progress and move to the next section.


### Section 5: Job Specific Competencies

If applicable to this employee/job/department, you can attach your departments Job/Population specific competency form.

1. Click on the **Add** button .
2. Click **Attach** , then select the file from your computer and click Open.
3. Click **Next**.


### Section 5: Overall

Finally, you'll have the opportunity to provide an overall rating and some final comments.

1. Click on the **Edit** icon .
2. If you feel that the calculated rating doesn't match your expectations, simply click in the **Rating** drop down box to update.
3. Click the **Next** button to save your progress and move to final review.

### Review & Submit

Before you submit to your manager for 2<sup>nd</sup> level sign-off, you have one more opportunity to review everything you've entered and to make any changes you want to make. To change anything:

1. Click on the **Edit** icon  to change or update any section. Remember, you'll need to have provided a rating on each item.
2. Click **Submit** and then **Done** to move the review to the 2<sup>nd</sup> level manager. If any ratings are missing, you'll get an error flag on the top of your screen. Click on **View All** to see what is missing.

### Manage your Performance from a Mobile Device

Workday allows you to manage your information from any device with an internet connection, which includes your phone. *In order to ensure the security of your data, NYP requires that any login to Workday from a non-hospital device go through two factor authentication.*

For instructions on enrolling in and using Duo, see the "Enrolling in 2 Factor Authentication" link in the **How Do I?** Worklet.

While we recommend using the "mobile web" version of Workday for most transactions ***Performance will work from the Workday App.***

#### Get the App:

You can download the Workday App from your phone's appropriate App store, then set the General Settings as follows:

Tenant: nyp

#### Use the Mobile Web:

This doesn't require you to download the app, just to open your phone's browser and go to <https://www.myworkday.com/nyp>. The "mobile web" experience will give you the exact same look and feel that you'll find on your desktop, optimized to your device.