EMPLOYEE JOB AID

COMPLETE SELF EVALUATION

You will receive an email notification in your Outlook inbox and a Workday Inbox action to complete a Self Evaluation for your Annual Summary or Pulse Check. The Self Evaluation is your opportunity to highlight accomplishments over the performance period, describe the extent to which you have met your Goals, and to comment on your Strengths and Growth Areas (development opportunities) as they relate to the Firmwide Behaviors and Performance Expectations and our purpose and values. While voluntary, the Self Evaluation allows you to have a voice in the Annual Summary and Pulse Check process. It also provides a way for you to share feedback you receive from others about your performance. The Self Evaluation appears side-by-side with the Manager Evaluation as part of the Annual Summary.

Ensure your Goals are approved to be visible in the Self Evaluation. If changes or edits to your Goals need to be made after the launch of the Self Evaluation, changes can be made directly in your Self Evaluation.

At the end of the 2-week timeline, your Self Evaluation will be locked and sent to your career manager automatically - regardless of whether or not it is complete. Your career manager can send it back to you to complete it if you miss the timeline due date.

Remember to connect with your career manager to discuss any Representative Sources (aka Sources of Input). This step is completed outside of Workday via an email, phone call, or conversation.

1. From your Workday inbox, click the action to write your Self Evaluation

2. Choose the Guided Editor for step-by-step guidance through the process

NOTE: The Summary Editor can be used to provide a summary view of the Self Evaluation

2/23/2018
3. You may add, edit or delete Goals, if desired. To add a Goal, click **Add**. The **Add** button is gray and appears at the bottom of the screen. Click the “use existing Goal” box to select a previously approved in progress Goal or you may type in a new Goal using the **Goal** and **Description** fields. Once the Goal is added click the check mark at the top right corner of the Goal. Do **NOT** click submit until you have completed the Self Evaluation.

**NOTE:** You cannot add archived Goals using “use existing Goals”, the Goal must be manually added using the Goal and Description fields.

**NOTE:** If you add or edit Goals in your Self Evaluation, those changes will not appear in your Goals until the Annual Summary or Pulse Check is completed.

**NOTE:** Any Goals with a due date within the performance period will be pulled into the Annual Summary or Pulse Check. Goals with due dates outside of the performance period may be manually entered (e.g., Pulse Check, multi-year Goal)
• **June to May** is the performance period for Senior Associates, Chief Engineer/ Technologists/ Scientists/Technical Specialists and Principals, Distinguished Technologists/Engineers/Scientists/Technical Specialists

4. Under Employee Evaluation Comments, describe how you performed against each of your Goals, including your contributions and impact. Where appropriate, reference examples of specific Values, Firmwide Behaviors and/or Performance Expectations demonstrated related to that Goal and our purpose and values. When complete, click **Next**.

![Employee Evaluation Form](image)

**NOTE:** You may download a copy of the feedback you received throughout the year to use when adding your comments. Click on your picture at the top right, and **View Profile**, and under the Performance Feedback Received tab, select the **Excel** icon to export to Excel. You then have the option to type your comments into the Self Evaluation.

![Excel Icon](image)

5. Review instructions to complete Strengths and Growth areas. Click the **pencil icon** or **Employee Evaluation** to add comments. Highlight which of the Firmwide Behaviors and Performance Expectations are strengths, and which you want to focus on for career growth including building functional expertise.

![User Interface](image)
6. When finished, click **Next**.

7. **Save for Later**, or when finished, click **Submit**.

**NOTE:** Your Self Evaluation will go to your career manager for review. If you don’t complete and submit your Self Evaluation within the 2-week timeline, the system will automatically submit your Self Evaluation for you by the due date.

**UP NEXT:**

- Your career manager will receive a copy of your Self Evaluation and use it as input to their Manager Evaluation
- Upon completion of the Manager Evaluation your career manager will schedule a Debrief meeting with you
- Following the Debrief meeting, your career manager will submit the Annual Summary for your review. You will receive an Outlook email and a Workday inbox action to acknowledge the Annual Summary (see next section for more details).

**ACKNOWLEDGE ANNUAL SUMMARY OR PULSE CHECK**

1. Once a career manager submits your Annual Summary or Pulse Check, you will receive a notification in your **Outlook email** and a **Workday Inbox** task to acknowledge that you have reviewed your Annual Summary.

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2. Click the Workday inbox task to review and acknowledge your Annual Summary or Pulse Check at the top of the screen. You may click the pencil icon or click Status under Employee Acknowledgment. Once you have read the review, scroll to the top and in the drop down, select Acknowledge.

![Image of Workday inbox task]

**NOTE:** Acknowledging your Pulse Check or Annual Summary and providing your electronic signature indicates you have read this Pulse Check or Annual Review document. It does not mean you agree with the content.

3. You have the option to add comments, but this is not required. Once you have acknowledged your review, click Submit.

![Image of acknowledgment interface]

4. To print a copy of your Annual Summary or Pulse Check, click on your Profile picture at the top right corner, and View Profile. Select Performance, and then the Performance Reviews option to see any in-progress or completed Performance Reviews. Click Create New PDF and a hyperlink will appear under Review PDF.

![Image of profile picture and view profile selection]

2/23/2018
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<th>Individual Goals</th>
<th>Archived Goals</th>
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