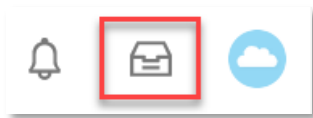


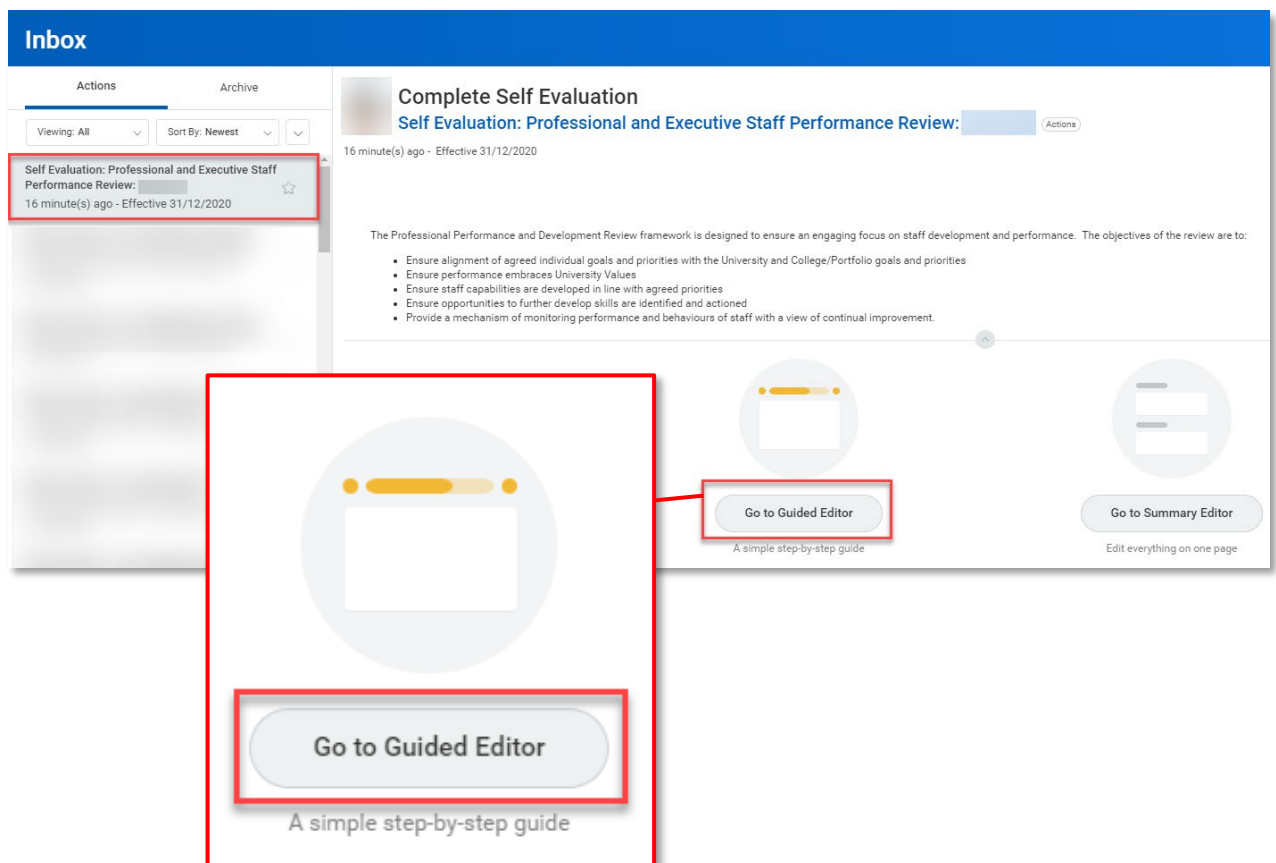
Each calendar year, fixed term and continuing employees who have worked at the university for 12 months or more or have a contract of 12 months or longer are to undergo a performance review.

In the last quarter of each calendar year, People and Culture will trigger a task for all Professional and Executive staff to complete a self-evaluation, reflecting on the year in review.

1. Open your inbox.



2. Select the *Self Evaluation: Professional and Executive Staff Performance Review* task and select *Go to Guided Editor*.



Inbox

Actions Archive

Viewing: All Sort By: Newest

Self Evaluation: Professional and Executive Staff Performance Review: 16 minute(s) ago - Effective 31/12/2020

Complete Self Evaluation
Self Evaluation: Professional and Executive Staff Performance Review: 16 minute(s) ago - Effective 31/12/2020

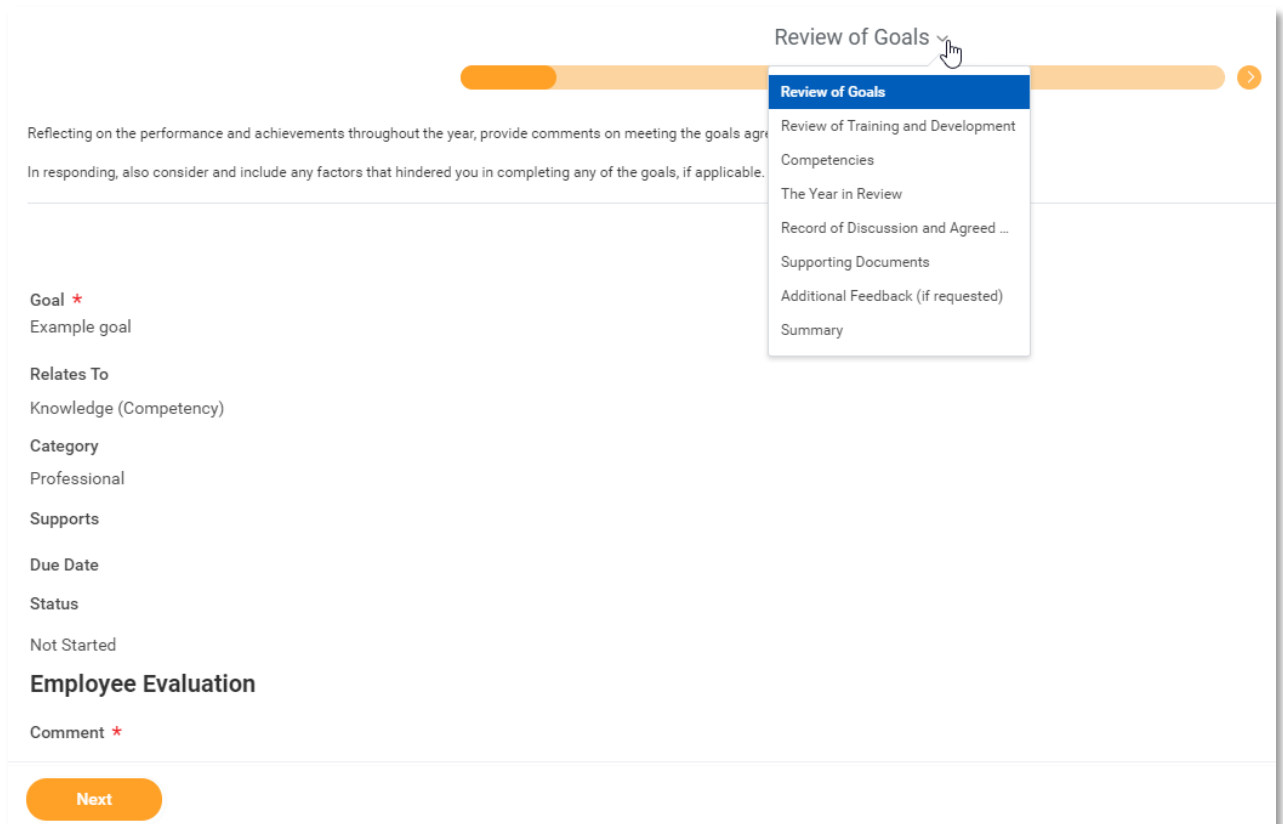
The Professional Performance and Development Review framework is designed to ensure an engaging focus on staff development and performance. The objectives of the review are to:

- Ensure alignment of agreed individual goals and priorities with the University and College/Portfolio goals and priorities
- Ensure performance embraces University Values
- Ensure staff capabilities are developed in line with agreed priorities
- Ensure opportunities to further develop skills are identified and actioned
- Provide a mechanism of monitoring performance and behaviours of staff with a view of continual improvement.

Go to Guided Editor
A simple step-by-step guide

Go to Summary Editor
Edit everything on one page

3. The *Review of Goals* will appear. Click into the white space to open the review. Note: You may choose to skip steps if not mandatory or relevant.



Review of Goals

Review of Goals

Review of Training and Development

Competencies

The Year in Review

Record of Discussion and Agreed ...

Supporting Documents

Additional Feedback (if requested)

Summary

Reflecting on the performance and achievements throughout the year, provide comments on meeting the goals agreed upon for the year.

In responding, also consider and include any factors that hindered you in completing any of the goals, if applicable.

Goal *

Example goal

Relates To

Knowledge (Competency)

Category

Professional

Supports

Due Date

Status

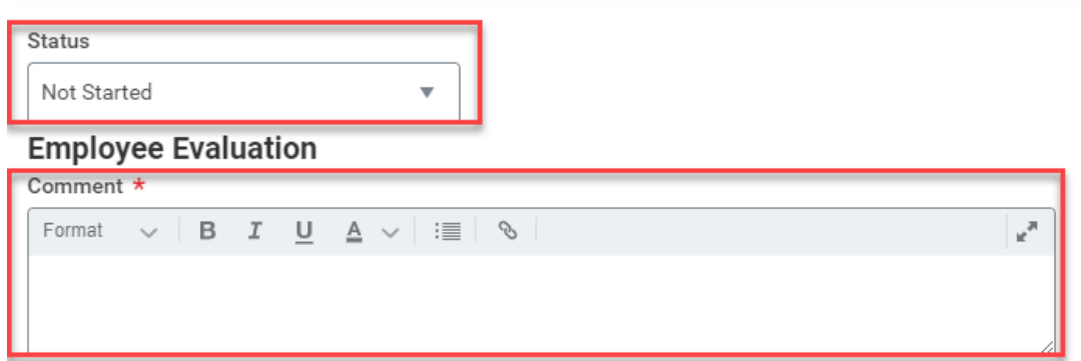
Not Started

Employee Evaluation

Comment *

Next

4. Update the Goal *Status* and add your self evaluation on the goal in the *Employee Evaluation* on each goal. Please do not amend your goal description.



Status

Not Started

Employee Evaluation

Comment *

Format

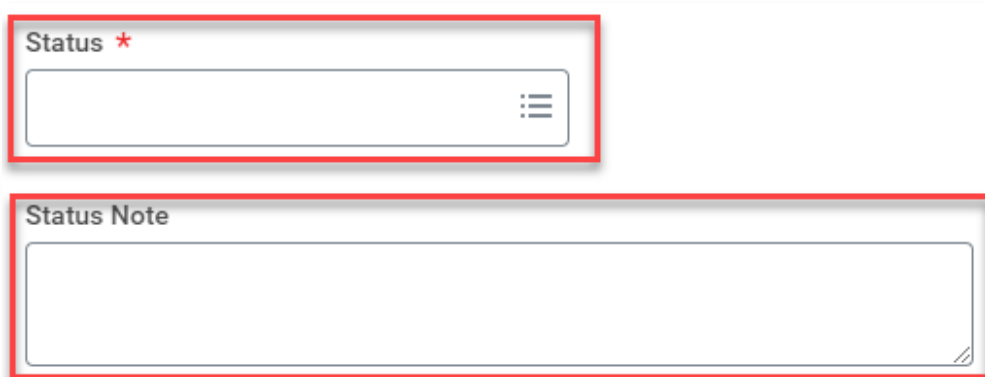
B I U A

☰ 🔗 ↶ ↷

5. Click *Next*.



6. The *Review of Training and Development* section will appear next (See image next page). As with the previous Review Goal screen (step 4), click into each development item to mark the status and make a comment (Status Note) on each.

A screenshot of a form with two fields. The first field is labeled "Status" with a red asterisk, indicating it is required. It contains a dropdown menu with a list icon on the right. The second field is labeled "Status Note" and is a large text area with a small icon in the bottom right corner. Both fields are highlighted with a red border.

Note: Any Development Items that have been marked as ‘Completed’ prior to this self evaluation task will *not* appear in this self evaluation review. However, you can add the completed development items into the review if you wish.

Review of Training and Development ▾



Provide confirmation that the agreed development and training items have been completed or reasons why they could not be finished in the agreed timeframe.

For the Professional Development items, consider and provide comments on the benefits gained by you and / or your work area following the completion.

Development Item *

Example item

Additional Information

Relates To

Knowledge (Competency)

Status *

Not Started

Add

Summary

Employee Evaluation

Comment

Back

Next

7. Click *Next*.

Back

Next

- The next step is *Competencies*. While this is not a university wide mandatory section, your supervisor will advise if you are required to complete this section. To complete it, add a *Proficiency Rating* and a comment under each competency and a final comment under the summary comments section. If not required, skip to step 9.

Competencies ▾

Listed below are competencies which relate to professional positions at Flinders University.

In consideration of the competency level expected at your classification (which can be found by following this link: [Expected Competency Levels by Professional Classification](#)), please rate each competency below and describe your proficiency level.

Competency

Qualifications and / or Experience

Category

Professional Competencies

Description

Employee Evaluation

Proficiency Rating

Comment

Back Next

Employee Evaluation

Proficiency Rating

select one ▾

Comment

Format ▾ **B** *I* U **A** ▾ :☰ 🔗 ↻

Summary

Employee Evaluation

Comment *

Format ▾ **B** *I* U **A** ▾ :☰ 🔗 ↻

9. Click *Next*.

10. The next step is *The Year in Review*. This holds a series of questions which all require an *Answer*. Click into the questions to complete your answers.

The Year in Review ▾

< ————— >

This section enables discussion and feedback on achievements and / or challenges affecting successful performance.
It is also the opportunity for the employee and supervisor to reflect on learnings and to provide two-way feedback.

Question
UNIVERSITY VALUES:
How have you demonstrated the University's Values in your day to day role?
Provide examples of specific behaviours that reflect the university values.

Employee Evaluation

Answer *

Question
ACHIEVEMENTS:
Comment on major achievements in the last year and consider how they fit with the agreed goals set for the reporting period.

Employee Evaluation

Answer *

Back Next

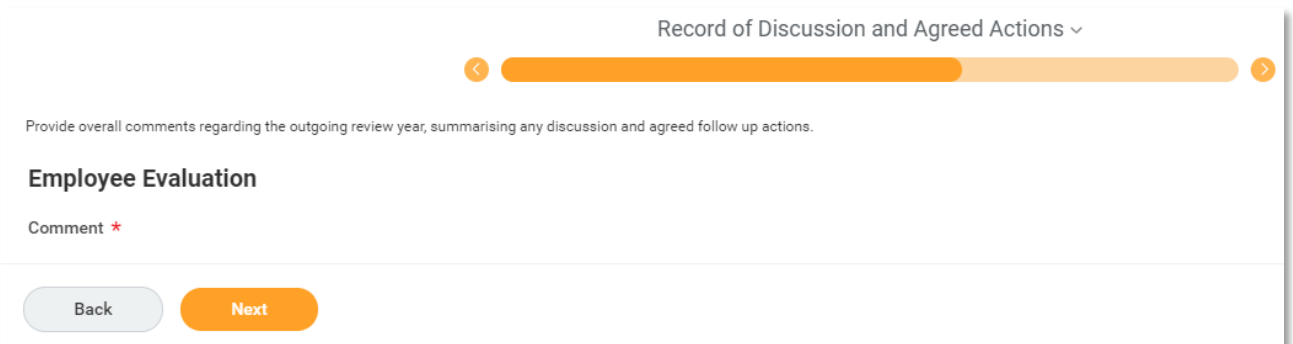
Employee Evaluation

Answer *

Format ▾ | **B** | *I* | U | **A** ▾ | :☰ | 🔗 | ↵

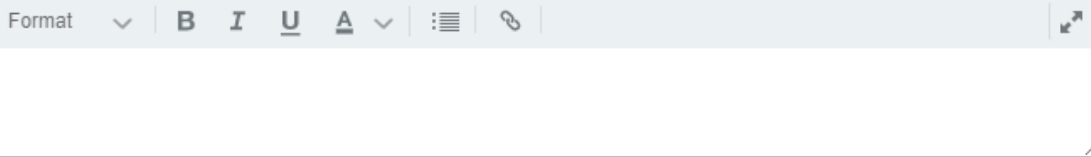
11. Click *Next*.

12. The next section is *Record of Discussion and Agreed Actions*. This section is for you as an employee to provide overall comments regarding the year this review was for. It is also where you will need to add any agreed actions from your point of view for the upcoming review period. This is your space to add any additional information. Click into the section to add your *Comment*.



Employee Evaluation

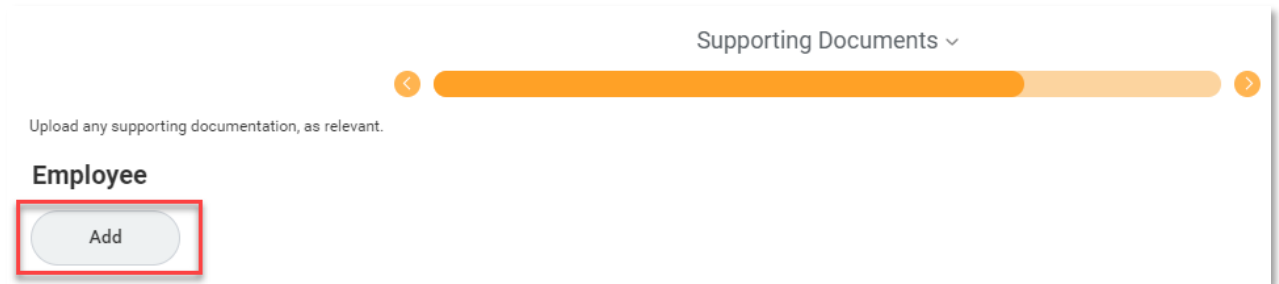
Comment *



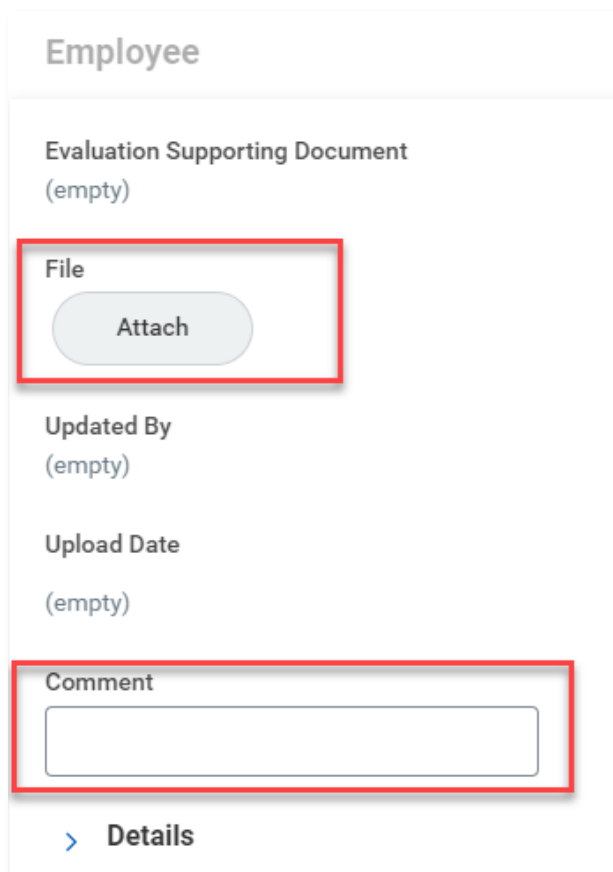
13. Click *Next*.



14. The *Supporting Documents* section is up next. To add any supporting documentation to your review click *Add*. If no documents need to be uploaded, skip to step 16.



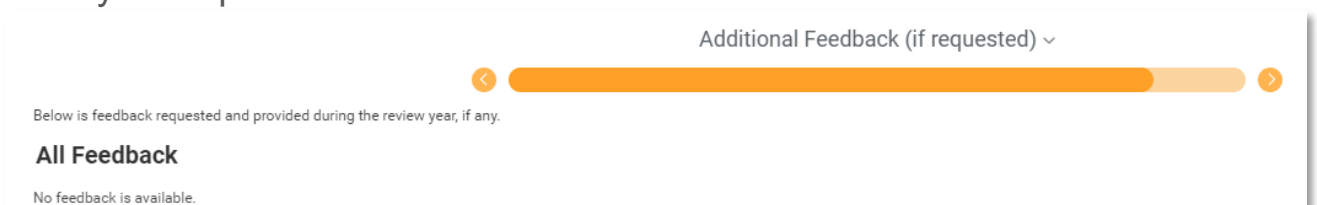
15. Click *Attach* to add a document that is saved on your computer and add a *Comment* as to what the document is. Repeat steps 14 and 15 until all relevant documentation has been added.



16. Click *Next*.



17. The next screen is *Additional Feedback (if requested)*. Displayed here for your review is any feedback sought by yourself, and received, from your supervisor.

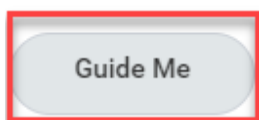


18. Click *Next*.



19. The final section is a complete *Summary*. This screen (image next page) shows the summary of all the information from each of the previous screens you have gone through in this self evaluation review.

If any section requires amendment, click on the *Guide Me* icon in the top right of the section. This will take you back to amend the information for that section. Then click next through to the summary screen again.



Review Period
01/01/2020 - 31/12/2020

The Professional Performance and Development Review framework is designed to ensure an engaging focus on staff development and performance. The objectives of the review are to:

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- Ensure performance embraces University Values
- Ensure staff capabilities are developed in line with agreed priorities
- Ensure opportunities to further develop skills are identified and actioned
- Provide a mechanism of monitoring performance and behaviours of staff with a view of continual improvement.

Review of Goals

Guide Me

Goal *

Example goal

Relates To

Knowledge (Competency)

Category

Professional

Supports

Due Date

Status

Completed

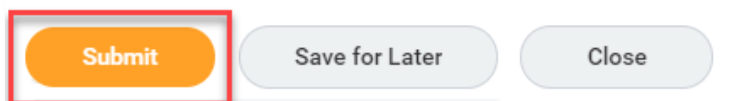
Completed On

Submit

Save for Later

Close

20. When all is ready for your supervisor to complete the review, click *Submit*.



The *Success! Event submitted* screen will appear with the Up Next task to your supervisor to get feedback from the review.

Please note, once your manager has provided their review, a new task will be assigned to you for acknowledgment – see next page.

Success! Event submitted

Self Evaluation: Professional and Executive Staff Performance Review:

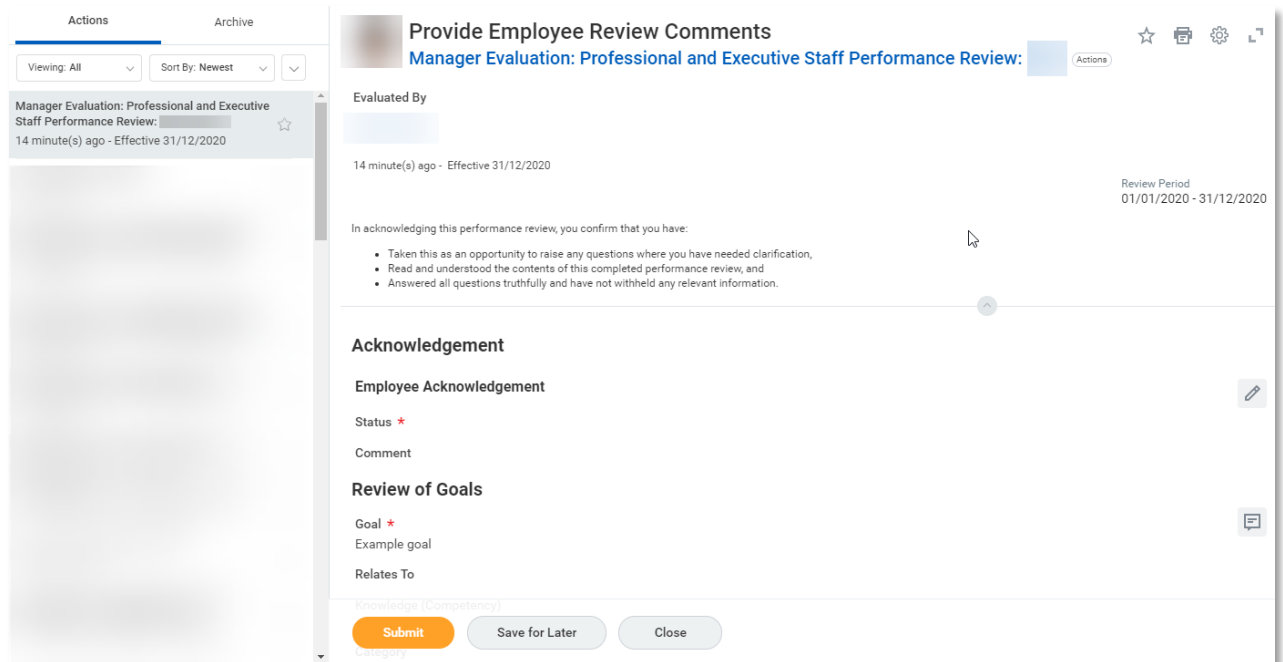
31 minute(s) ago - Effective 31/12/2020

Up Next

Professional and Executive Staff Performance Review: [redacted] - Get Feedback from Review

[> Details and Process](#)

21. The final part of the professional and executive review is to acknowledge your supervisor's evaluation. A *Manager Evaluation: Professional and Executive Staff Performance Review: Provide Employee Review Comments* task will appear in your inbox. This task is for you to supply your acknowledgement of the review.



Provide Employee Review Comments
Manager Evaluation: Professional and Executive Staff Performance Review:

Evaluated By: [Name]
 14 minute(s) ago - Effective 31/12/2020

Review Period: 01/01/2020 - 31/12/2020

In acknowledging this performance review, you confirm that you have:

- Taken this as an opportunity to raise any questions where you have needed clarification,
- Read and understood the contents of this completed performance review, and
- Answered all questions truthfully and have not withheld any relevant information.

Acknowledgement

Employee Acknowledgement

Status *

Comment

Review of Goals

Goal *

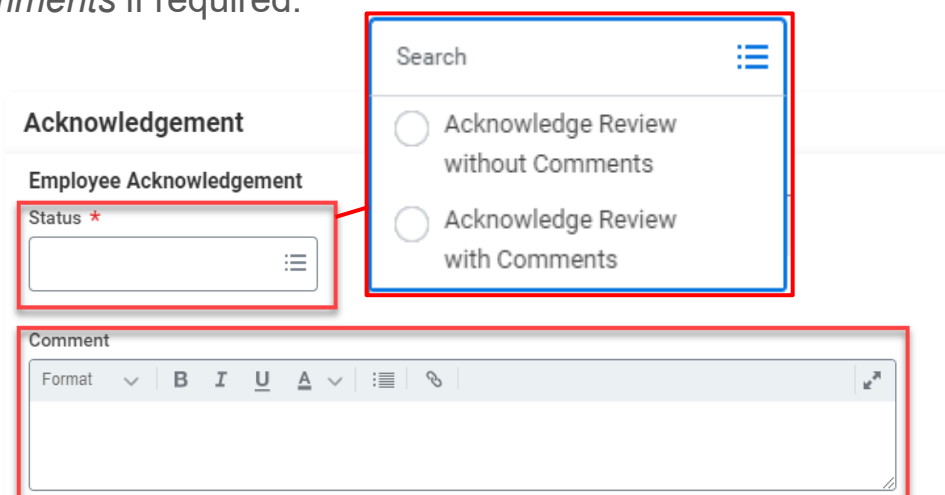
Example goal

Relates To

Knowledge (Competency)

Submit Save for Later Close

Select the *Status* as Acknowledge Review without or with comments. Add *Comments* if required.



Acknowledgement

Employee Acknowledgement

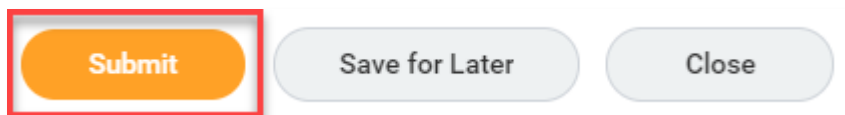
Status *

Comment

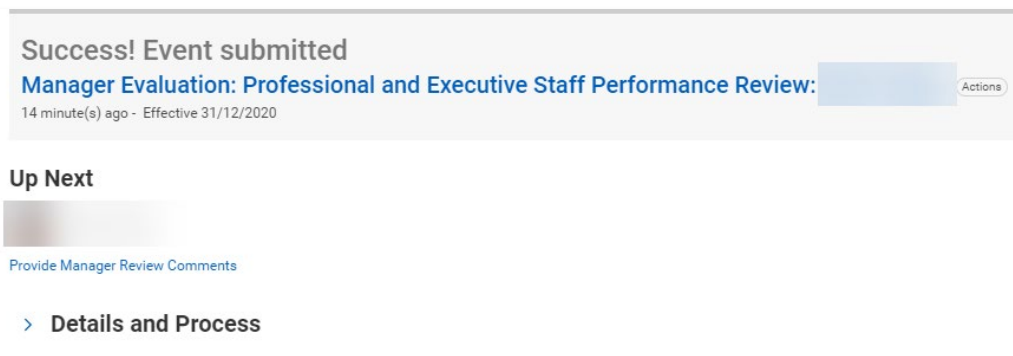
Format B I U A [List Icon] [Link Icon]

22. Once all comments are added (if relevant) click *Submit*.

Note: If you have any concerns related to comments that have been made, prior to submitting the employee acknowledgement it is recommended that you contact your supervisor to discuss in the first instance. Following this if there is no resolution please contact your People and Culture Business Partner.



23. Once the *Manager Evaluation* task is submitted, the Up Next task is with the supervisor to *Provide Manager Review Comments*. This is the supervisor's acknowledgement of review task.



24. Click *Done*.



This ends the process for performance review until the next year.

A copy of your review can be found in your Workday profile under the Performance tab and Performance Reviews. See image next page.

Review	Review Period		View	Create New PDF
	Start Date	End Date		
Professional and Executive Staff Performance Review: [blurred]	01/01/2020	31/12/2020	View	Create New PDF
Professional and Executive Staff Goal Setting: [blurred]	01/01/2020	31/12/2020	View	Create New PDF

In the instance a printed copy of your review is required, select the **Create New PDF** option next to the required review and click on the **Print** icon in the top right corner of the PDF screen.

