

AIP Performance Review

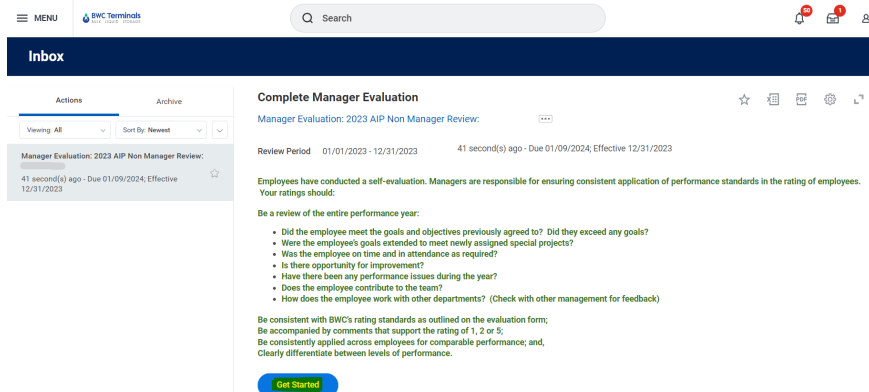
Manager Evaluation

AIP manager evaluations will start with the employee's manager and will follow the management chain up to SVP level.

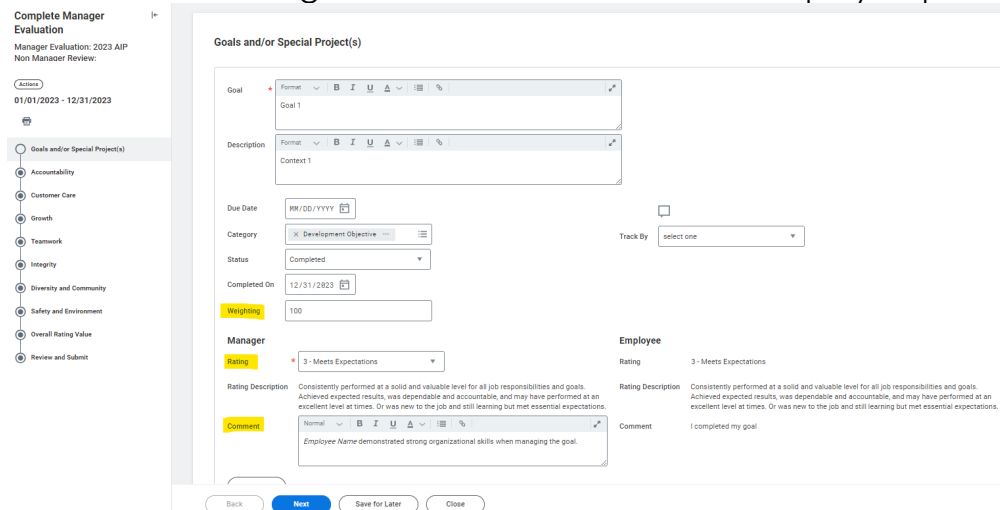
[Click here to watch a video on how to complete the Manager Evaluation.](#)

Complete Manager Evaluation:

1. Navigate to the **Complete Manager Evaluation** task in your Workday inbox.
2. Review the provided directions and select **Get Started**.



3. Review the weightings and make changes if needed. Note that weighting on all goals must total 100.
4. Review ratings provided by employees and provide your own ratings for each goal. Even if you agree with the rating, you must provide a rating.
5. Provide comments. Comments are required on ratings of a 1, 2, or 5 and comments are recommended on ratings of a 3 or 4. Please provide comments on ratings that are different than the employee provided.



AIP Performance Review

Manager Evaluation

6. Complete steps 3-5 for each goal.
7. In the Manager Summary box, Workday will calculate an overall rating based on the ratings provided for each goal. You can leave the calculated rating or you can override the rating if you do not agree with the calculated rating. Please add comments to justify changing the calculated rating. Note that you can only give a whole number rating. Calculated ratings will show you how they were rounded.
8. Select **Next**.
9. Review proficiency rating added by employees and add your own proficiency rating. Even if you agree with the employees rating, you will need to select a rating.
10. Provide comments. Comments are required on ratings of a 1,2, or 5 and comments are recommended on ratings of a 3 or 4. Please provide comments on ratings that are different than the employee provided. As managers, you will want to take this as an opportunity to note performance for the whole year and document any issues and successes.

The screenshot displays the 'Complete Manager Evaluation' interface. On the left is a navigation sidebar with a breadcrumb trail: 'Goals and/or Special Project(s)' > 'Accountability' > 'Customer Care' > 'Growth' > 'Teamwork' > 'Integrity' > 'Diversity and Community' > 'Safety and Environment' > 'Overall Rating Value' > 'Review and Submit'. The main content area is titled 'Accountability' and contains a table with the following structure:

Competency	Description	Manager Evaluation	Employee Evaluation
Accountability	Hold ourselves and each other accountable for our actions. Accepts responsibility and performs duties in a timely manner while ensuring quality and excellence in work. Delivers results aligned with the business plan through setting and achieving challenging goals based on key performance indicators. Encourages and exploits new ideas and possibilities; actively searches for ways to make positive changes or improvements within business; open to new ideas.	Proficiency Rating: 2 - Needs Improvement Comment: It is important to us that our team members meet deadlines and produce high-quality work. Let's work together to get you back on track.	Proficiency Rating: 3 - Meets Expectations Comment:

Below the table are two summary boxes:

- Manager Summary:** Overall Rating Weight: 17.5; Calculated Proficiency Rating: 2 - Needs Improvement (Rounded from 2)
- Employee Summary:** Calculated Proficiency Rating: 3 - Meets Expectations (Rounded from 3)

At the bottom of the interface are four buttons: 'Back', 'Next' (highlighted in green), 'Save for Later', and 'Close'.

11. Select **Next**.
12. Repeat steps 7 and 8 for each core competency. Note that the listed core competencies are based on position.
13. Complete the Overall Rating Value by leaving the calculated overall rating or overriding the rating Workday calculated for you. Provide an overall comment. Note that even though the rating is a whole number, when bonus calculations are completed the nonrounded rating will be used.

AIP Performance Review

Manager Evaluation

14. Provide an overall comment.

Complete Manager Evaluation
 Manager Evaluation: 2023 AIP
 Non Manager Review:

01/01/2023 - 12/31/2023

- Goals and/or Special Project(s)
- Accountability
- Customer Care
- Growth
- Teamwork
- Integrity
- Diversity and Community
- Safety and Environment
- Overall Rating Value
- Review and Submit

Overall Rating Value

Manager

Calculated Rating 3 - Meets Expectations (Rounded from 2.9)
 Default Rating 3 - Meets Expectations
 Rating 3 - Meets Expectations
 Override Calculated Rating

Rating Description Consistently performed at a solid and valuable level for all job responsibilities and goals. Achieved expected results, was dependable and accountable, and may have performed at an excellent level at times. Or was new to the job and still learning but met essential expectations.

Comment
 Your performance at the beginning of the year was outstanding, however, it has started to decline over the last few months. Let's work together to identify the reasons why and create a plan to improve.

Buttons: Back, Next, Save for Later, Close

15. Select **Next**.

16. Review weightings, ratings, and comments. Reread comments for grammatical errors.

Complete Manager Evaluation
 Manager Evaluation: 2023 AIP
 Non Manager Review:

01/01/2023 - 12/31/2023

- Goals and/or Special Project(s)
- Accountability
- Customer Care
- Growth
- Teamwork
- Integrity
- Diversity and Community
- Safety and Environment
- Overall Rating Value
- Review and Submit

Goals and/or Special Project(s)

Goal Goal 1
 Description Context 1
 Due Date (empty)
 Category Development Objective
 Status Completed
 Completed On 12/31/2023
 Weighting 100
 Track By (empty)

Manager

Rating 3 - Meets Expectations
 Rating Description Consistently performed at a solid and valuable level for all job responsibilities and goals. Achieved expected results, was dependable and accountable, and may have performed at an excellent level at times. Or was new to the job and still learning but met essential expectations.
 Comment Employee Name demonstrated strong organizational skills when managing the goal.

Manager Summary

Overall Rating Weight 40
 Calculated Rating 3 - Meets Expectations (Rounded from 3)
 Rating 3 - Meets Expectations
 Rating Description Consistently performed at a solid and valuable level for all job responsibilities and goals. Achieved expected results, was dependable and accountable, and may have performed at an excellent level at times. Or was new to the job and still learning but met essential expectations.
 Comment

Employee

Rating 3 - Meets Expectations
 Rating Description Consistently performed at a solid and valuable level for all job responsibilities and goals. Achieved expected results, was dependable and accountable, and may have performed at an excellent level at times. Or was new to the job and still learning but met essential expectations.
 Comment I completed my goal

Employee Summary

Calculated Rating 3 - Meets Expectations (Rounded from 3)
 Rating 3 - Meets Expectations
 Rating Description Consistently performed at a solid and valuable level for all job responsibilities and goals. Achieved expected results, was dependable and accountable, and may have performed at an excellent level at times. Or was new to the job and still learning but met essential expectations.
 Comment

Buttons: Submit, Send Back, Save for Later

17. Select **Submit**.

18. The review will continue throughout the management chain.

AIP Performance Review

Manager Evaluation

Second Management Level – Complete Manager Evaluation

As the second level of management to review the AIP performance review, you will need to review the comments and ratings that have already been added. You have the option to edit ratings and comments that were added by the manager. You also have a **Send Back** option from the review and submit section. If you are sending back, you will need to select who you are sending it back to and add a comment. Please double check who you are sending the review back to.

Third Management Level and Above – Complete Manager Evaluation

If you are the third level of management or above to review an AIP performance evaluation, you will not be able to make any edits. After reviewing if you feel edits are needed, then you will need to use the Send Back option. To send back, navigate to the summary section and select **Send Back**. You will need to select who you are sending it back to and add a comment. Please double check who you are sending the review back to.

Employee Discussion: **STOP – DO NOT CLICK SUBMIT UNTIL AUTHORIZED BY MANAGEMENT**

Once the AIP performance review process is completely finished, you will be notified by management that you can start the employee discussion process. Until then, **leave this task in your inbox**. Please be very careful and do **not** select submit. Selecting submit will send the performance review with all comments and ratings to the employee.

Complete To Do Employee Discussion ...

37 second(s) ago - Effective 12/31/2023

For

Overall Process 2023 AIP Non-Manager Review

Overall Status In Progress

Due Date 01/17/2024

Instructions **STOP - DO NOT CLICK SUBMIT** until authorized by management.

Please facilitate a conversation with your employee **before clicking submit**.

Once submitted, the form will be sent to the employee for review and acknowledgment.

AIP Performance Review

Manager Evaluation

Additional guidance for performance reviews:

41 Performance review phrases for managers, peers & yourself – [Click here for the full article](#)

When evaluating direct reports, it is important to use positive performance review phrases that focus on strengths rather than weaknesses.

For example...

- *"You have a strong work ethic and consistently deliver results"*
- *"You take initiative when completing tasks and often exceed expectations"*.

Instead of saying "you need to do better at time management", try something like...

- *"Planning ahead more effectively would be a great way for you to get tasks done faster and smoother" or*
- *"Regular attendance at team meetings could help us all stay in the loop with projects"*.

By taking this approach, clear direction can be provided while maintaining an upbeat attitude overall.

Positive performance review phrases for managers

- *"John has consistently outdone expectations, meeting deadlines ahead of schedule"*
- *"Jane's attitude towards her job is admirable as she always goes the extra mile"*
- *"Susan achieved all tasks assigned within budget and Joe dealt with customer complaints expeditiously"*
- *"John shows excellent initiative when problem-solving"*
- *"Jane demonstrates strong organizational skills when managing projects"*.

Negative performance review phrases for managers

- *"Let's work on delegating tasks and giving team members the autonomy they need to complete their work effectively."*
- *"I've noticed that there have been some misunderstandings lately. Let's work on improving your communication skills to ensure everyone is on the same page."*

AIP Performance Review

Manager Evaluation

- *"We need to prioritize our tasks to meet our goals. Let's work together on improving your time management skills to ensure we're meeting our deadlines."*
- *"Let's work on developing a leadership style that is more collaborative and supportive of the team, to create a more positive work environment."*
- *"Your presentations could be clearer. Let's work on improving your public speaking skills to ensure your message is getting across effectively."*

Additional helpful articles regarding performance reviews.

- [150+ Helpful Performance Review Phrases for Managers \(superbeings.ai\)](https://superbeings.ai)
- [Performance Appraisal Phrases: 200 Helpful Phrases For Employee Performance Reviews - Sling \(getsling.com\)](https://getsling.com)
- [New Messages! \(lattice.com\)](https://lattice.com)