

Performance Management Process

Getting Started in Workday



Training Objectives

- Prepare for the PMP Process in Workday
- Demonstrate the PMP Process in Workday
- How to Enter Employee Goals into Workday
- Assist Employees with the PMP Process
 - Training Aid Access (The Job Aid explains the process of initiating and completing business processes in Workday)
 - Self-Evaluation

Agenda

- Definitions
- PMP Process
- Navigating the Search Feature
- Training Aids
- Demonstration
- Discussion/Questions

Definitions

Business Process: The term used to describe a task in Workday

Error: a message/warning that is displayed when submitting a process. It must be resolved to successfully complete the business process.

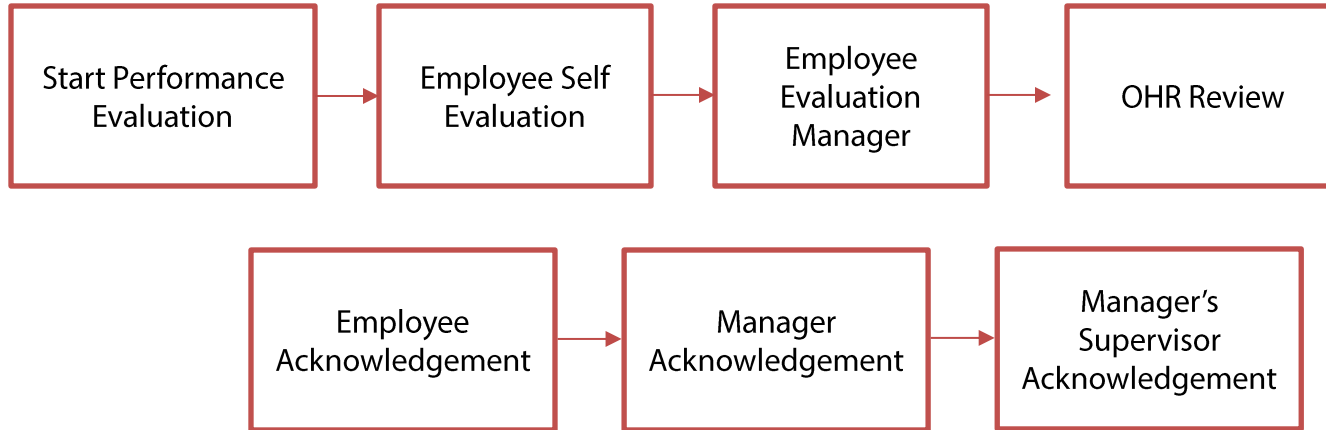
Milestones: Tasks for the employee to achieve their goals.

Notification: Based on your Security Role, you will receive notifications about a business process that has been completed. (No Action Required by you)

Search Bar: Use Employee name or FSUID to search or Process (Start Performance Review)

Task: is an action item that goes into your inbox in Workday that you need to complete.

PMP Business Process Flow Chart



Tasks to prepare for the PMP

- Review Employee's Position Information Form (PIF)
 - General Purpose/Role of the Position (Goals)
 - Essential Functions (Milestones)
- Review Previous PMPs
- Expectations Meeting (Develop Goals with employees)
- Search for employee in Workday
- Enter Goals into Workday

Position Information Form - Goals

2. GENERAL PURPOSE/ROLE OF THE POSITION

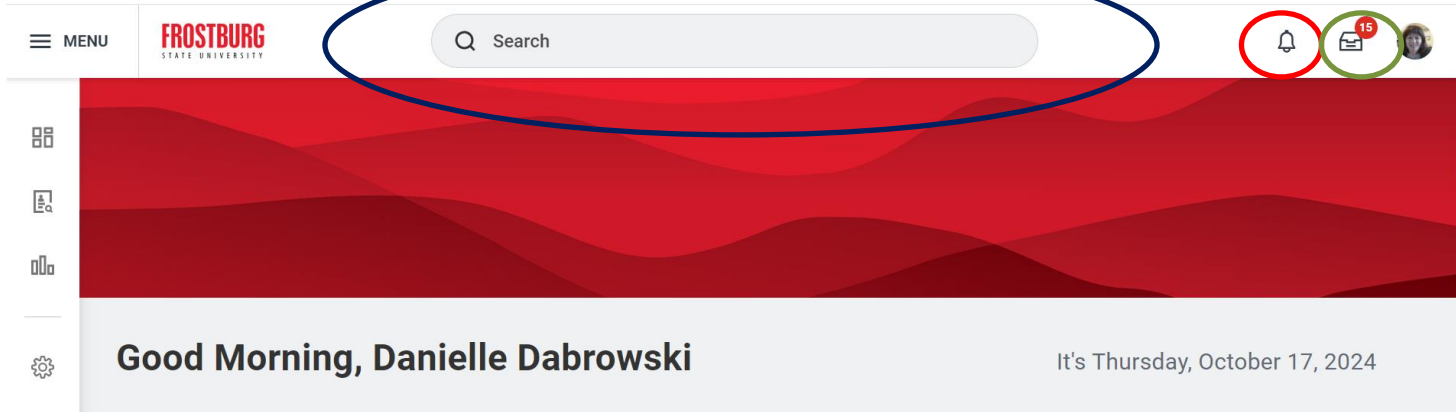
Provide a brief summary statement that addresses the purpose of the position and the reason it exists within the department. A detailed description of job duties will be required in Section 3.

Reporting to the Chief Human Resources Officer (CHRO), this position will provide a broad range of professional employee relations activities that includes, performance management process for probationary and annual evaluations, guidance and interpretation of USM/FSU policies and procedures, employee handbook, corrective action, and memorandum of understandings (MOU) for collective bargaining units. Assist and participate in collective bargaining negotiations and grievances. Design and deliver trainings for new hires, employees, and supervisors pertaining to employee relations, collective bargaining, and related policy compliance. Assist with administrative responsibilities relating to website updates, unemployment compensation and financial disclosure filings. Serve on assigned USM/FSU committees. Maintain confidentiality of sensitive employee information. Report any evolving issues, problems, and/or concerns to the CHRO.

Position Information Form - Milestones

	Duty and Responsibility	% of Time
1.	Employee Relations: Advises and trains supervisors on employee relations practices and strategies including corrective action steps such as counseling, warnings, performance improvement plans, suspensions, and terminations. Assists in resolving employee relations issues. Conducts thorough and objective investigations.	30%
2.	Collective Bargaining: Assists CHRO with grievances, disciplinary actions, investigations, and training that includes, labor negotiations, coalition bargaining, and hearings. Serves as a resource and consults with supervisors regarding labor matters, policies, and interpretation of MOU's. Fosters and maintains a positive union/management relationship.	25%
3.	Performance Management: Oversees and manages the Performance Management Process (PMP) and system including probationary and annual performance evaluations. Provides customer support and training for new hires, supervisors, faculty, and staff related to goal-setting, ratings, and TrakStar capabilities. Guides employees and supervisors through the PMP to support department/ FSU goals. Provides guidance and assistance to assess performance and their leadership skills. Incorporates Diversity & Inclusion into the PMP.	20%
4.	Policies & Procedures: Oversees and monitors HR policies and procedures to ensure consistency with FSU/USM policies and procedures, including the Employee Handbook. Stays abreast of trends, state and federal employment/ labor laws, regulations, and best practices. Provides recommendations and assistance in the development and implementation of the HR policies, procedures, and programs.	15%
5.	Other duties as assigned, includes but is not limited to serving on campus committees as assigned by CHRO such as USM Labor Employee Relations Work Group, FSU Labor Management Committee. Participates in new hire orientation and assigned trainings. Captures HR metrics. Cross-trains with HR staff to expand knowledge and skills to support and perform other functions in the department, includes Benefits, HRIS, Class/Comp, Recruitment, and Training and Development. Manages financial disclosure filings and ensures required reporting to the Maryland Ethics Commission for key employees. Reviews and completes unemployment claims.	10%

Workday Homepage – Brief Introduction



Workday Homepage – Brief Introduction

The screenshot displays the Workday homepage for Frostburg State University. The header includes a menu icon, the university logo, a search bar (circled in blue), and notification and mail icons (circled in red and green). The main content area features a red background with a wavy pattern. Below the header, the user's name, "Good Morning, Danielle Dabrowski", and the date, "It's Thursday, October 17, 2024", are displayed.

Performance > Individual Goals

The screenshot displays a web browser window with the URL `myworkday.com/marylandconnect/d/inst/1537/24753038.html#TABTASKID=2998%246163`. The browser's address bar shows several tabs, including 'View Worker - Danielle D...' and 'FSU Faculty/Staff Portal'. The page content is divided into a left sidebar and a main content area. The sidebar, which is red, features a profile picture of Danielle Dabowski and lists various navigation options: Home, Email, Team, Summary, Overview, Job, Academic, Compensation, Absence, Benefits, Pay, Personal, Contact, Performance (highlighted), Career, Company Property, and Travel. The main content area has a top navigation bar with three tabs: 'Performance Reviews', 'Individual Goals', and 'Archived Goals'. The 'Individual Goals' tab is selected, and the content below it shows 'none entered'. A red arrow points from the 'Individual Goals' tab to the 'Performance' option in the sidebar. A blue arrow points from the 'Performance' option in the sidebar to the 'Individual Goals' tab.

Individual Goals > Edit

The screenshot shows a web browser window displaying the myworkday.com interface. The user is logged in as Danielle Dabrowski. The page is titled "Individual Goals" and shows a list of 6 items. The selected goal is "Departmental Goals and Initiatives". The goal description is "Work to achieve departmental goals and objectives." The goal status is "(empty)". The goal weight is 0, and the due date is 03/31/2025. The goal has no associated reviews. The goal is tracked by "(empty)". The goal has 11 milestones. The milestones table is as follows:

Milestone	Due Date	Status
Policy Review	03/31/2025	
I-9 Completion and Audit	03/31/2025	
Professional Development Trainings	03/31/2025	
Jackson Lewis Symposium	03/31/2025	
BOR Awards	03/31/2025	
FBI Cumberland Oracle Mock Interviews	03/31/2025	
Employee Appreciation/Recognition	03/31/2025	
Performance Review	03/31/2025	
HRIS Data	03/31/2025	

Edit>Add

Individual Goals - Workday | FSU Faculty/Staff Portal | myworkday.com/vday/authg... | myworkday.com/marylandconnect/d/inst/1537/24753038.html#TABTASKID=2997%245672

Workday SANDBOX... | Enrive Login | Legion Data Access | LinkedIn Learning | Baseline - Antholog... | Bylaws, Policies & G... | Workday maryland... | Exiting Employee | F... | Non-Exempt Pay P... | Adobe Acrobat | LinkedIn Learning | PD Week 2024 - USM

Individual Goals

Danielle Dabrowski

Add

0 items | Sort By: -

- Departmental Goals and Initiatives
- Employee Professional Development
- Employee Relations
- Labor Relations
- Training
- Workday Implementation and Training

Edit Goal

Goal

Description

Status

Weight

Due Date

Associated Reviews (empty)

Track By

Milestones 11 items

Milestone	Due Date	Status
Policy Reviews	03/31/2025	
19 Completion and Audits	03/31/2025	
Professional Development Trainings	03/31/2025	
Jackson Lewis Symposium	03/31/2025	

Submit **Save for Later** **Cancel**

Add > Complete Fields > Save for Later

The screenshot shows the 'Create Goal' form in the myworkday.com interface. The form includes the following fields and options:

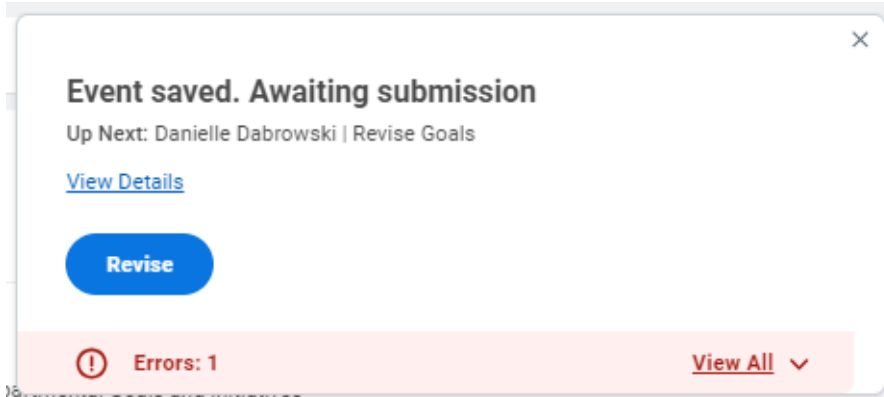
- Goal:** A text input field with a rich text editor toolbar.
- Description:** A text input field with a rich text editor toolbar.
- Status:** A dropdown menu with the option 'select one'.
- Weight:** A text input field with the value '0'.
- Due Date:** A date picker field showing 'MM/DD/YYYY'.
- Associated Reviews:** A dropdown menu with the option '(empty)'. Below it is a 'Track By' dropdown menu with the option 'select one'.
- Milestones:** A table with 0 items. The table has columns for 'Milestone', 'Due Date', and 'Status'.

At the bottom of the form, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'. A blue arrow points from the 'Save for Later' button to the 7th step in the list on the right.

1. Goal (PIF – General Purpose)
2. Description (of the Goal)
3. Weight (not Required)
4. Due Date: End of rating period (3/31/2025)
5. Track by (not required)
6. Milestones – (responsibilities and tasks that will enable the employee to accomplish the goal)
7. Save for Later

Closing Notes

- Error Messages



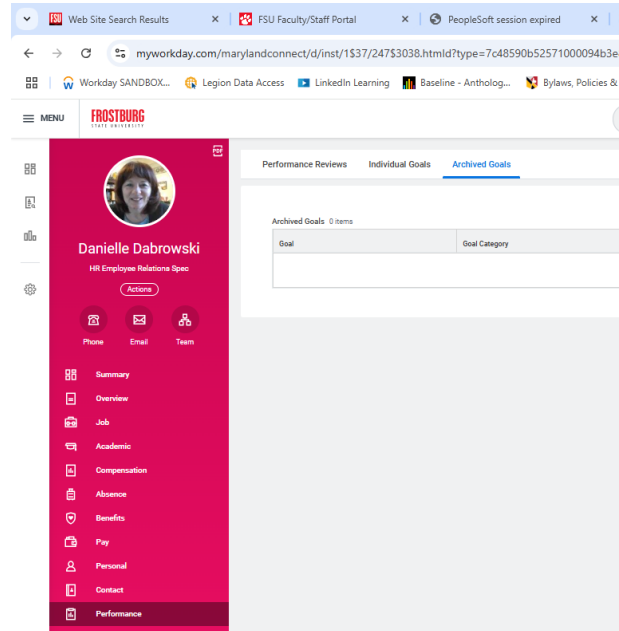
A screenshot of a web interface showing a confirmation message box. The box has a close button (X) in the top right corner. The main text reads "Event saved. Awaiting submission". Below this, it says "Up Next: Danielle Dabrowski | Revise Goals". There is a blue link "View Details" and a blue button labeled "Revise". At the bottom of the box, there is a red bar with a warning icon (exclamation mark in a circle) and the text "Errors: 1". To the right of this bar is a link "View All" with a dropdown arrow.

Error

1. Page Error
 - FSU Exempt and # of Goals is Greater than 5 (Goal Event)

Closing Notes

- Exempt – 5 Goals
- Nonexempt – 3 Goals
- Archive Goals
- Probationary PMPs



PMP Timeline

- January 2025:
 - OHR will initiate the Organization wide PMP Process (Note: Probationary PMPs will be launched on the day of New Hire Orientation)
- February/March 2025:
 - Employee Self-evaluation
 - Manager evaluation of the employee's performance
 - Meet with employee about the performance review (Adjust goals as needed for next PMP)
 - Employee Acknowledgment
 - OHR Acknowledgement
 - Supervisor's Supervisor Approval/Acknowledgment

Training Aids & Computer Based Training (CBTs)

1. **Access Workday Learning:** Click [here](#) to go to the Workday Learning login page.
2. **Select Your School:** Choose your school's SSO link from the list provided.
3. Select **Menu** in the top left corner.
4. Select **Learning** app.
5. Go to **Discover** > **Browse Learning** > enter the topic or job aid name into the search bar under **Browse Learning Content**. Tip: use the faceted filters on the left to narrow down results. Job aids are Lessons under **Type**.

Demonstration



<https://www.frostburg.edu/facultystaff/>

PMP Discussion Points

- Competencies (All are on the PMP)
- Athletics
- Housekeeping

Questions

