How to send staff evaluations to the correct manager

Use: In some instances an employee’s manager changes in the middle of the year. In this instance, the employee’s former manager may receive the employee’s evaluation, rather than the new manager. There are two phases: completing the evaluation and signing off on the evaluation. This document outlines the process for ensuring that the employee’s new, correct manager is provided with the employee’s evaluation to complete.

Phase 1 – Completing the evaluation

Step 1: Manager who incorrectly received evaluation

1. Find the evaluation for the staff that you wish to reassign and choose that evaluation in your Workday Inbox.
2. Click on the gear icon in the evaluation in the inbox and choose Reassign.
3. Under “Proposed Person” type in the name of the manager who should complete the evaluation. Under “Reason” type “Employee switched to this manager effective DATE” and include the approximate date that the employee changed managers. Then select “Ok”.
4. Your part of the process is complete. The Employee’s evaluation will remain in your inbox until the receiving manager approves the reassignment of the evaluation.
Step 2: Receiving Manager


2. Scroll to the right and under “Action” select “Approve” and include any comment that you wish to include. Choose “Ok”.

3. On the following screen that states “The task was completed successfully” select “Done.”
4. Refresh your Inbox. The employee’s performance evaluation will now be in the correct manager’s inbox for completion. It will no longer be accessible to the previous manager. The process is complete.

Phase 2: Signing off on the evaluation after the employee has Acknowledged

Step 1: Manager who incorrectly received evaluation

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2. Click on the gear icon in the evaluation in the inbox and choose Reassign.
3. Under “Proposed Person” type in the name of the manager who should complete the evaluation. Under “Reason” type “Employee switched to this manager effective DATE” and include the approximate date that the employee changed managers. Then select “Ok”.
4. Your part of the process is complete. The Employee’s acknowledgement will remain in your inbox until the receiving manager approves the reassignment of the evaluation.

Step 2: Receiving Manager


2. Scroll to the right and under “Action” select “Approve” and include any comment that you wish to include. Choose “Ok”.

3. [Image of Workday interface showing the reassignment request process]

4. [Image of Workday interface showing the approval process]

5. [Image of Workday interface showing the completed reassignment process]
3. On the following screen that states “The task was completed successfully” select “Done.”

4. Refresh your Inbox. The employee’s acknowledgement will now be in the correct manager’s inbox for completion. It will no longer be accessible to the previous manager. The process is complete.