

Each calendar year, academic staff at the university with a contract of 12 months or longer and those employed at the university for 12 months or more, will be subject to a performance review.

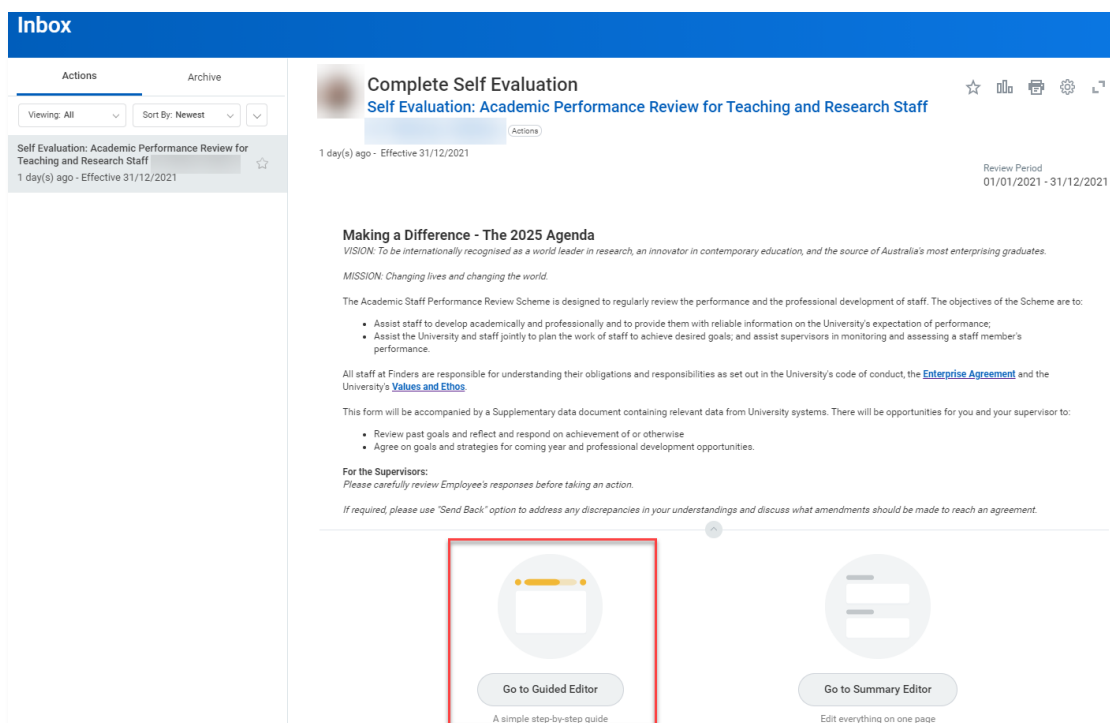
People and Culture will initiate the performance review task in the second half of each calendar year. When this occurs, a task will appear in your Workday inbox.

This guide captures all steps involved in a review of a Teaching and Researching Academic, however, your academic role will determine the task name and steps in your review. Please note that all review types hold sections contained in this guide.

1. Open your inbox.



2. Select the *Self Evaluation: Academic Performance Review for (Teaching and Research Staff)* task and click on *Go to Guided Editor*.



The screenshot shows a Workday inbox interface. At the top, there are tabs for 'Actions' and 'Archive'. Below these are filters for 'Viewing: All' and 'Sort By: Newest'. A task card is visible with the title 'Self Evaluation: Academic Performance Review for Teaching and Research Staff' and a sub-title 'Complete Self Evaluation'. The task card includes a 'Go to Guided Editor' button, which is highlighted with a red square in the original image. Other buttons like 'Go to Summary Editor' are also visible.

- The Guided Editor will open a series of sections to be completed. Please note that the sections visible to you will depend on your academic role.

For balanced academics (i.e., those performing both teaching and research) the first of these will show goals for teaching and related duties. If this is your second or subsequent review, the goals from the previous review year will load. Click into the white space to start editing.

The screenshot displays the 'Teaching & Related Duties - Goals' section in the Workday system. It features a progress bar at the top and a dropdown menu for selecting goal categories. The main content area shows a goal for the previous review year with a text editor and various fields for 'Relates To', 'Category', 'Supports', 'Due Date', and 'Status'. A red arrow highlights the 'Relates To' field, which is currently set to 'Teaching and Related Duties'. The goal text is 'Teaching goal for the previous review year.' and the status is 'In Progress'. Below the goal editor, there is an 'Employee Evaluation' section with a comment field containing the text 'I will work on this throughout 2021'.

4. Update the *Status* of the goal.

If the goal status is changed to Completed, an additional field will appear to indicate the Completion date. Enter a date if relevant.

Status

Completed ▼

select one

Not Started

In Progress

Completed

No Longer Applicable

Completed On

30/07/2021



5. Update the *Employee Evaluation* with your assessment about the progress on the goal, including any limiting factors that impacted you.

Employee Evaluation

Comment *

Normal ▼

B

I

U

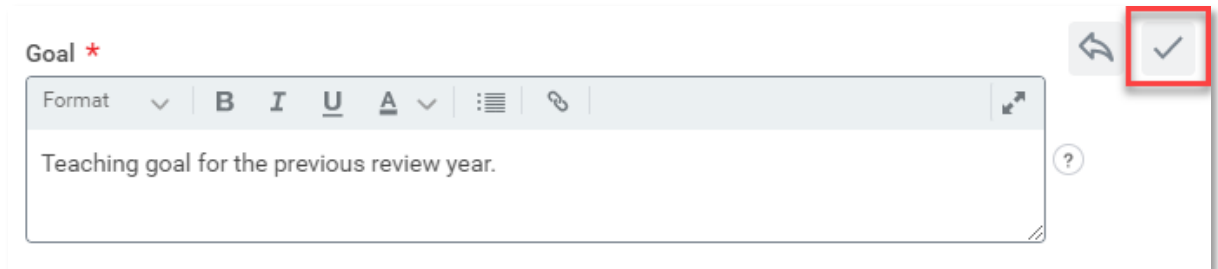
A ▼



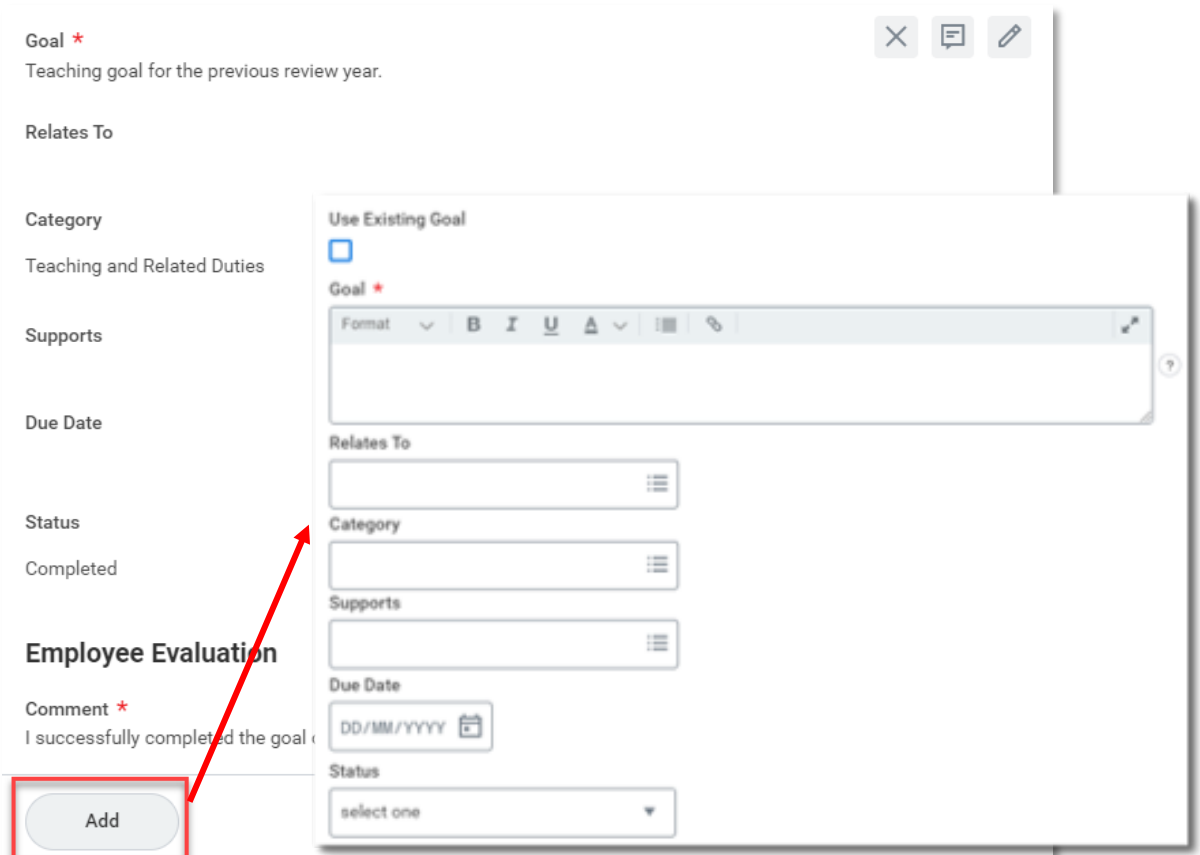
I successfully completed the goal on time and to the expected standar

6. Repeat steps 3 to 5 for all pre-loaded goals.

- Once you have reviewed and updated all pre-loaded goals, select the tick box in the top right corner of the goal to save your changes.

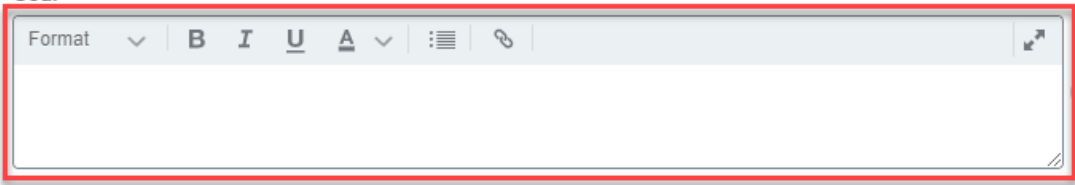


- Click on *Add* to input goal items for the next review year. Note: some of your goals may go over more than one calendar year in which case you can click Use Existing Goal to select this type of goal from 2022 onwards.



9. Enter your *Goal*.

Goal *



A rich text editor interface with a red border. The toolbar includes 'Format', bold (B), italic (I), underline (U), text color (A), bulleted list, and link icons. The editor area is currently empty.

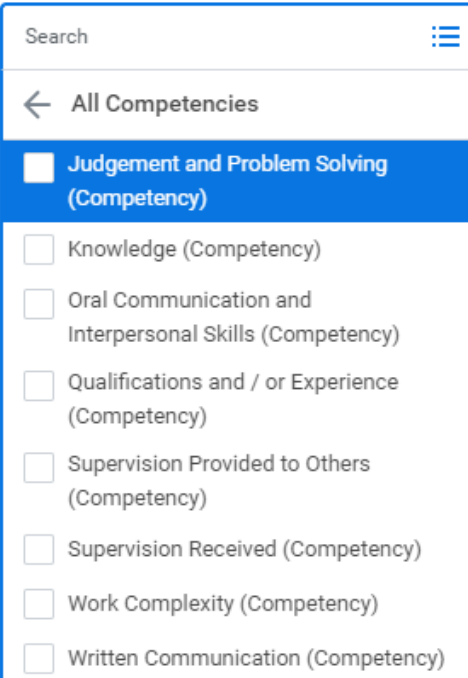
10. Select what the goal *Relates To* (not mandatory).

Relates To



A dropdown menu with a list icon on the right side, currently showing no options.

Search




A list of competencies with checkboxes. The first item, 'Judgement and Problem Solving (Competency)', is highlighted in blue. Other items include Knowledge, Oral Communication and Interpersonal Skills, Qualifications and / or Experience, Supervision Provided to Others, Supervision Received, Work Complexity, and Written Communication.

- Judgement and Problem Solving (Competency)
- Knowledge (Competency)
- Oral Communication and Interpersonal Skills (Competency)
- Qualifications and / or Experience (Competency)
- Supervision Provided to Others (Competency)
- Supervision Received (Competency)
- Work Complexity (Competency)
- Written Communication (Competency)

11. Select the *Category* the goal sits within. Note: this section should relate to *Teaching and Related Duties* (mandatory).

Category

× Teaching and Related Duties 

Search

Professional


Research Outputs and Achievements

Service and Leadership

Teaching and Related Duties

12. Select the organization goal your goal *Supports* (not mandatory).

Supports

Search 

My Organization Goals >

All Organization Goals >

Search for Organization Goal >

13. Enter the *Due Date* of the goal (not mandatory).

Due Date

DD/MM/YYYY 

14. Select the *Status* of the goal (mandatory).

Status

select one ▼

select one

Not Started

In Progress

Completed

No Longer Applicable

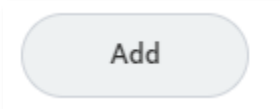
15. Enter an *Employee Evaluation Comment* on the goal.

Employee Evaluation

Comment *

Format ▼ **B** *I* U **A** ▼ | ☰ | 🔗 | ↗

16. In the instance you have more than one goal to enter, click the *Add* icon and complete steps 8 to 16 again until you have added all your goals.



17. When all goals have been added, click *Next*.



18. The next section to complete is *Teaching and Related Duties – Questions*. Click on the task and enter in the *Employee Evaluation Answer*.

Teaching & Related Duties - Questions ▾

< [Progress Bar] >

Question ✎

Provide comments on evaluation of teaching including SETs or other evaluation, or regarding current teaching allocations, and other evidence of teaching excellence.

In responding, consider supplementary data document which provides Teaching Activities for the current year, full SET reports and benchmarking information and well as any additional teaching achievements/teaching evaluation indicators not captured in data.

Employee Evaluation

Answer *

Employee Evaluation

Answer *

Format ▾ | **B** | *I* | U | A ▾ | ☰ | 🔗 | ↗

[Empty text area]

19. Click *Next*.



20. The next section to complete is *Research Outputs and Achievements – Goals*. If this is your second or subsequent review, the goals from the previous review year will load. Click into the white space to start editing.

Research Outputs and Achievements - Goals ▾

◀ ██████████ ▶

For the goals pre-loaded from the previous review year (if relevant):
Reflecting on the research outputs as summarised in the supplementary data document, provide comments on meeting goals and effectiveness of strategies for research from previous year.
In responding, consider supplementary data document which provides full list of ERA recognised research outputs, research income, and HDR completion data and relevant benchmarking information.

For the next review year:
After completing the detailed research plan using the following template: [Research Plan Template](#), summarise the agreed goals and strategies for research for future period.

⬆

Goal *
Research goal for the previous review year.

Relates To

Category
Research Outputs and Achievements

Supports

Due Date

Status
Not Started

Employee Evaluation

Comment *
I will be working on this in the next review year.

Add

Back Next

Goal *

Format ▾ B I U A ▾ :☰ 🔗

Research goal for the previous review year.

Relates To

Category
× Research Outputs and Achievements

Supports

Due Date
DD/MM/YYYY 📅

Status
Not Started ▾

Employee Evaluation

Comment *

Format ▾ B I U A ▾ :☰ 🔗

I will be working on this in the next review year.

21. Update the *Status* of the goal.

If the goal status is changed to Completed, an additional field will appear to indicate the Completion date. Enter a date if relevant.

Status

Completed ▼

select one


Not Started

In Progress

Completed

No Longer Applicable



Completed On

30/07/2021 

22. Update the *Employee Evaluation* with your assessment about the progress on the goal, including any limiting factors that impacted you.

Employee Evaluation

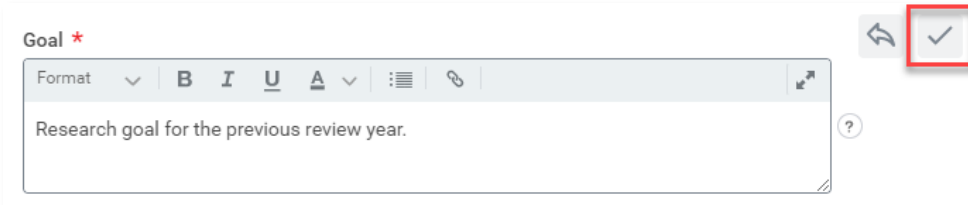
Comment *

Normal ▼ **B** *I* U A ▼  

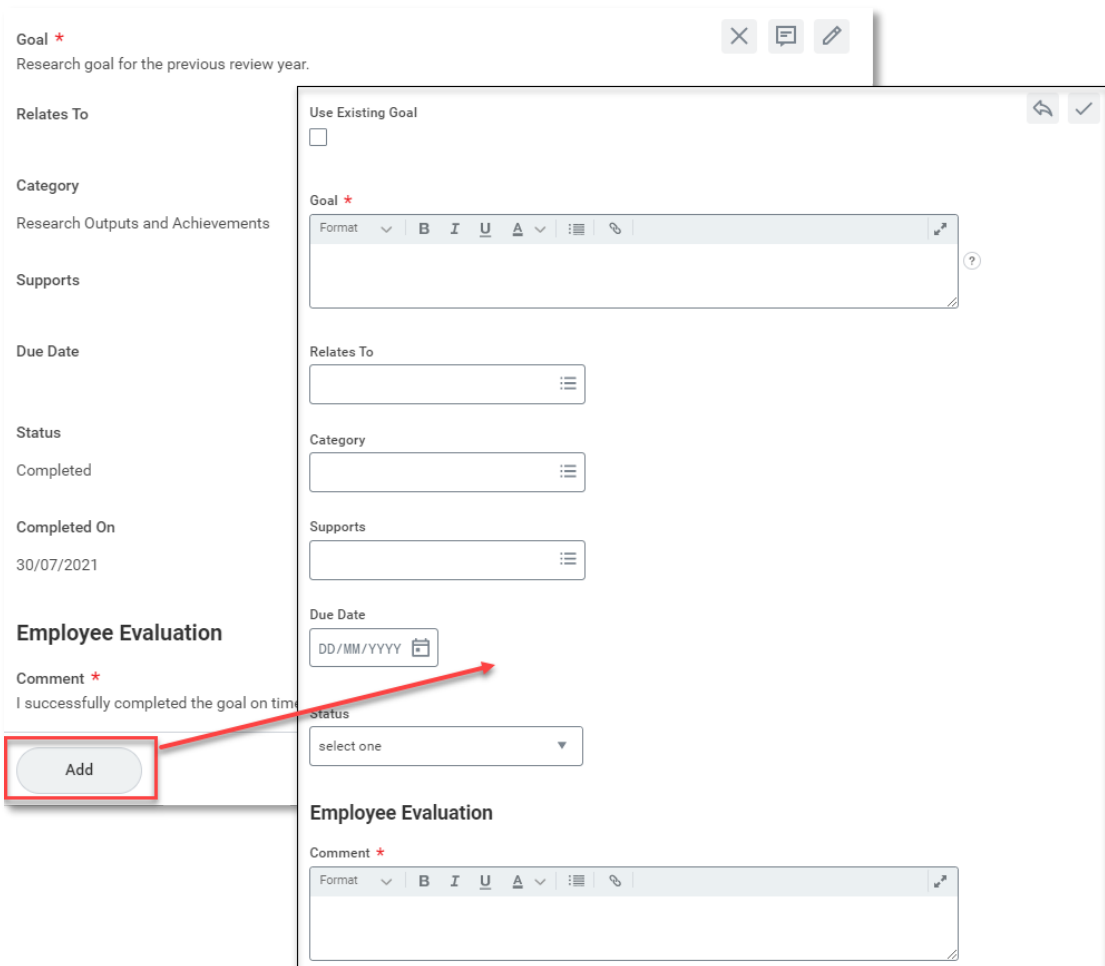
I successfully completed the goal on time and to the expected standar

23. Repeat steps 20 to 22 for all pre-loaded goals.

- 24. Once you have reviewed and updated all pre-loaded goals, select the tick box in the top right corner of the goal to save your changes.

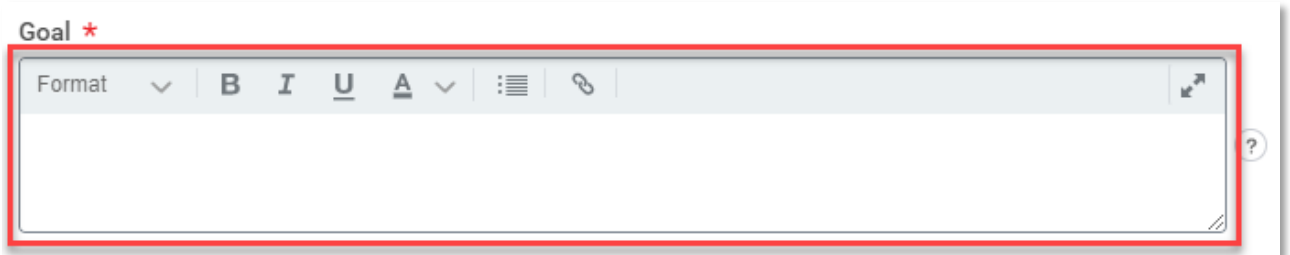


- 25. Click on the link at the top of the task for the *Research Plan Template*. Outside of Workday, complete the template. Back in this task, click *Add* to input goals for the next review year. Note: some of your goals may go over more than one calendar year in which case you can click *Use Existing Goal* to select this type of goal from 2022 onwards.




26. Enter your *Goal*.

Goal *



27. Select what the goal *Relates To* (not mandatory).

Relates To

Search 

← All Competencies

- Judgement and Problem Solving (Competency)
- Knowledge (Competency)
- Oral Communication and Interpersonal Skills (Competency)
- Qualifications and / or Experience (Competency)
- Supervision Provided to Others (Competency)
- Supervision Received (Competency)
- Work Complexity (Competency)
- Written Communication (Competency)

28. Select the *Category* the goal sits within. Note: this section should relate to *Research Outputs and Achievements* (mandatory).

Category

✕ Research Outputs and Achievements

Search

Professional

Research Outputs and Achievements

Service and Leadership

Teaching and Related Duties

29. Select what the organization goal your goal *Supports* (not mandatory).

Supports

My Organization Goals >

All Organization Goals >

Search for Organization Goal >

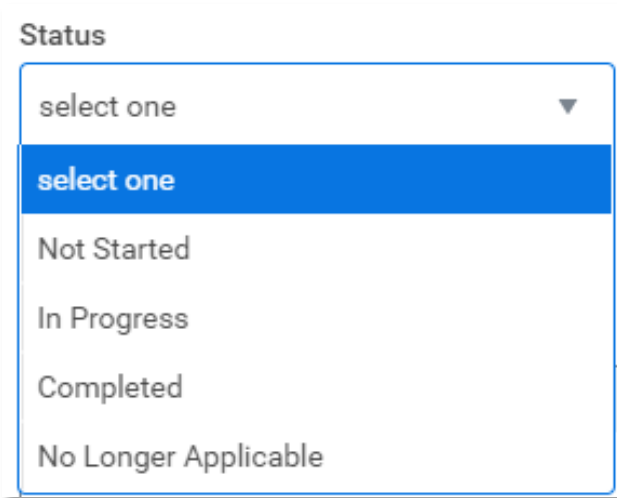
Search

30. Enter the *Due Date* of the goal (not mandatory).

Due Date

DD/MM/YYYY 

31. Select the *Status* of the goal (mandatory).



Status

select one ▼

select one

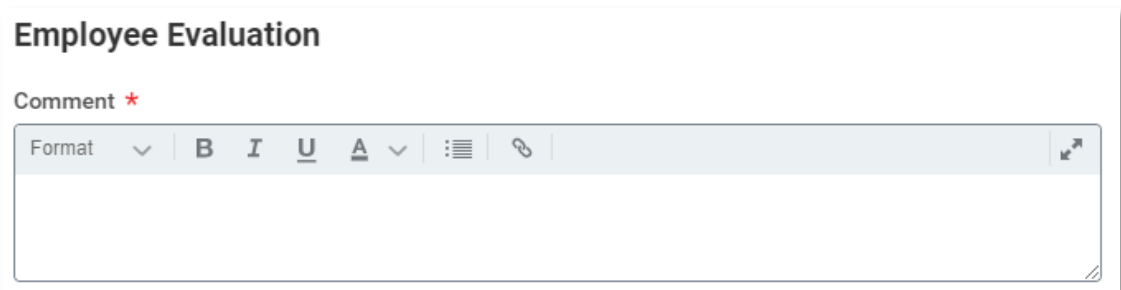
Not Started

In Progress

Completed

No Longer Applicable

32. Enter an *Employee Evaluation Comment* on the goal.

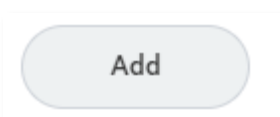


Employee Evaluation

Comment *

Format ▼ B I U A ▼ ☰ 🔗 ↗

33. In the instance you have more than one goal to enter, click *Add*, and complete steps 25 to 33 again until you have added all your goals.



Add

34. Click *Next* once you have entered all desired goals.



35. The next section to complete is *Service and Leadership – Goals*. If this is your second or subsequent review, the goals from the previous review year will load. Click into the white space to start editing.

Service and Leadership - Goals ▾

← ————— →

For the goals pre-loaded from the previous review year (if relevant):
Comment on service and leadership goals and effectiveness of strategies from previous year.

For the next review year:
Provide details of the agreed goals and strategies for service and leadership for future period.

Goal

Service and Leadership goal for the previous review year

Relates To

Category

Service and Leadership

Supports

Due Date

Status

Not Started

Employee Evaluation

Comment

I will be working on this in the next review year.

Add

Goal *

Format ▾ B I U A ▾ :☰ 🔗

Service and Leadership goal for the previous review year

Relates To

Category

× Service and Leadership

Supports

Due Date

DD/MM/YYYY 📅

Status

Not Started ▾

Employee Evaluation

Comment *

Format ▾ B I U A ▾ :☰ 🔗

I will be working on this in the next review year.

36. Update the *Status* of the goal.

If the goal status is changed to Completed, an additional field will appear to indicate the Completion date. Enter a date if relevant.

Status

Completed ▼

select one


Not Started

In Progress

Completed

No Longer Applicable






Completed On

30/07/2021 

37. Update the *Employee Evaluation* with your assessment about the progress on the goal, including any limiting factors that impacted you.

Employee Evaluation

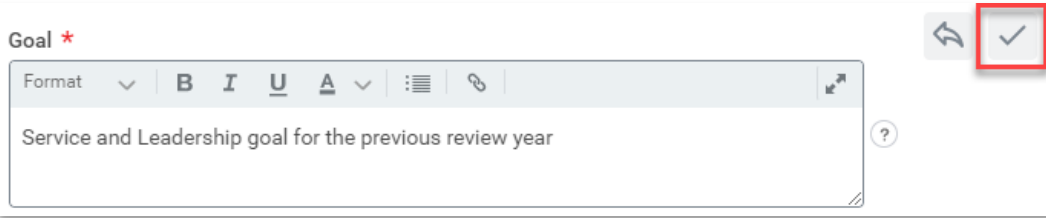
Comment *

Normal ▼ | **B** | *I* | U |  ▼ |  |  |  | 

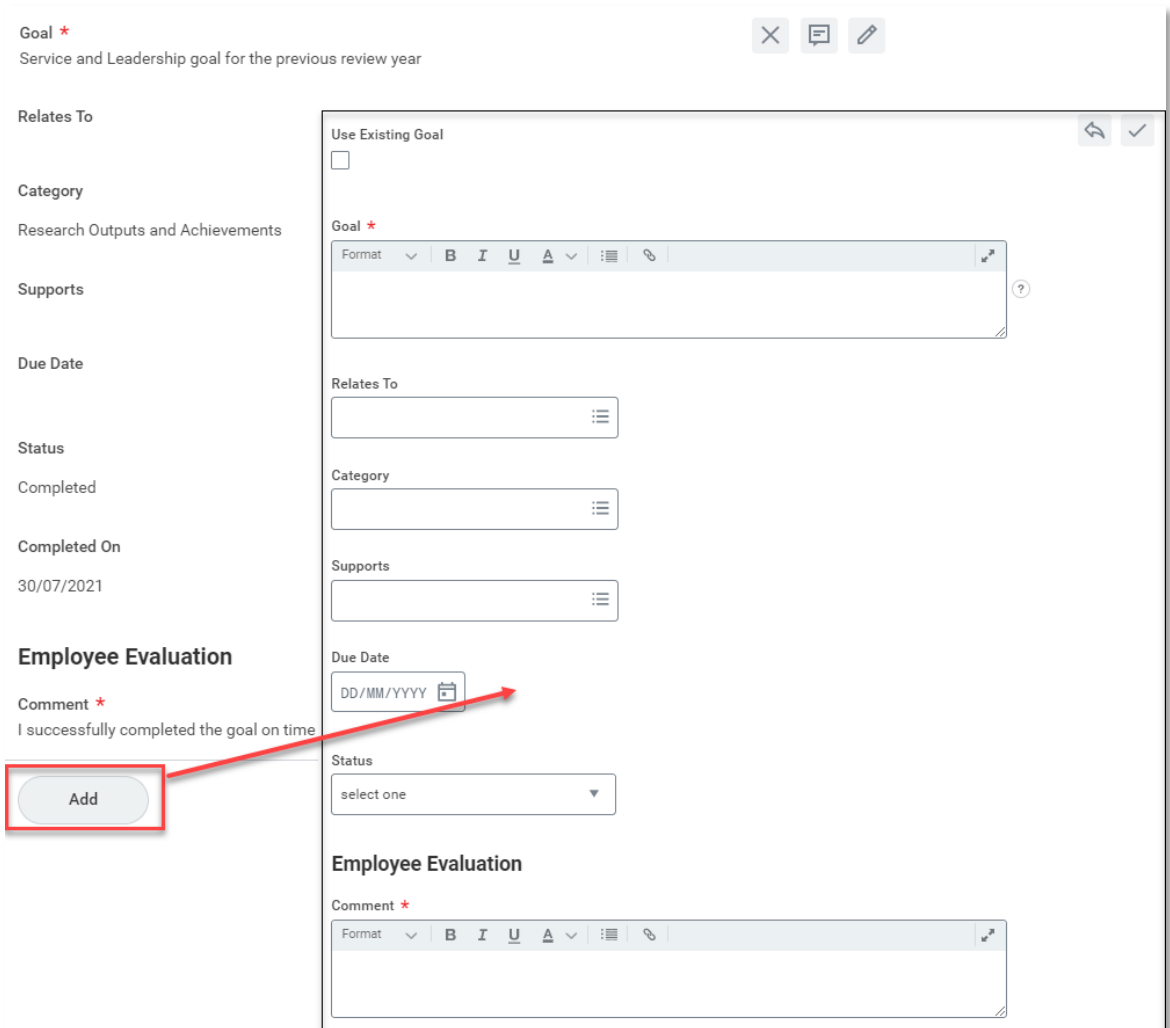
I successfully completed the goal on time and to the expected standar

38. Repeat steps 35 to 37 for all pre-loaded goals.

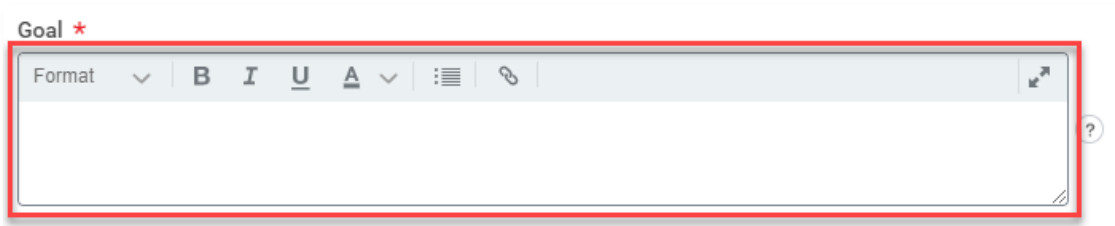
39. Once you have reviewed and updated all pre-loaded goals, select the tick box in the top right corner of the goal to save your changes.



40. Click on *Add* to input goal items for the next review year. Note: some of your goals may go over more than one calendar year in which case you can click Use Existing Goal to select this type of goal from 2022 onwards.

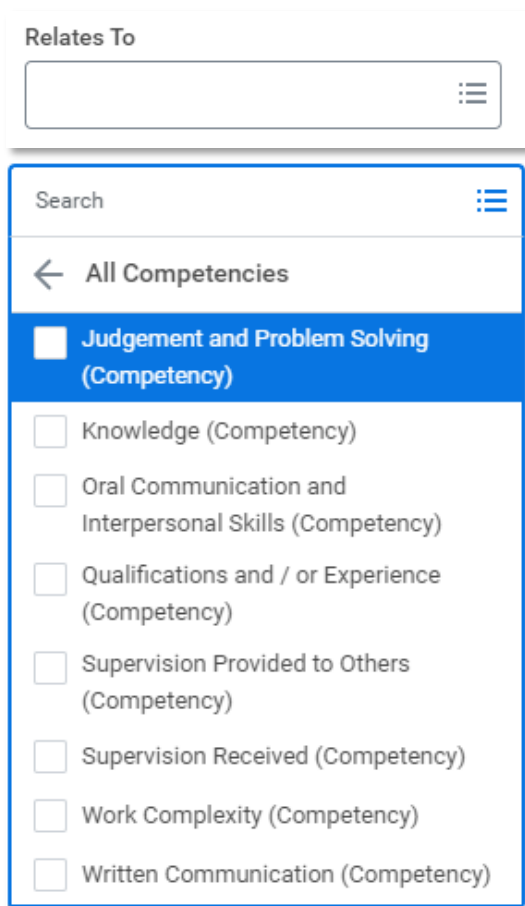


41. Enter your *Goal*.



The screenshot shows a text input field labeled "Goal *". The field is empty and has a red border. Above the field is a rich text editor toolbar with options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, and Link. A small question mark icon is visible in the bottom right corner of the field.

42. Select what the goal *Relates To* (not mandatory).



The screenshot shows a dropdown menu titled "Relates To". The menu is open, displaying a list of competencies. The first option, "Judgement and Problem Solving (Competency)", is highlighted in blue. Other options include Knowledge (Competency), Oral Communication and Interpersonal Skills (Competency), Qualifications and / or Experience (Competency), Supervision Provided to Others (Competency), Supervision Received (Competency), Work Complexity (Competency), and Written Communication (Competency). Each option has a checkbox next to it.

43. Select the *Category* the goal sits within. Note: this section should relate to *Service and Leadership* (mandatory).

Category

 Professional
 Research Outputs and Achievements
 Service and Leadership
 Teaching and Related Duties
Search

44. Select what the organization goal your goal *Supports* (not mandatory).

Supports

My Organization Goals >
All Organization Goals >
Search for Organization Goal >
Search

45. Enter the *Due Date* of the goal (not mandatory).

Due Date

46. Select the *Status* of the goal (mandatory).

Status

select one ▼

select one

Not Started

In Progress

Completed

No Longer Applicable

select one ▼

47. Enter an *Employee Evaluation Comment* on the goal.

Employee Evaluation

Comment *

Format ▼ B I U A ▼ ☰ 🔗 ↗

48. In the instance you have more than one goal to enter, click the *Add* icon and complete steps 40 to 48 again until you have added all your goals.

Add

49. Click *Next*.


Back

Next

50. The next section is *Service and Leadership – Questions*. Click into each question to complete your *Employee Evaluation Answer*.

Service and Leadership - Questions ▾

← ————— →


Question 

Provide information on any formal service and leadership roles and activities recognised in academic Workload Allocation that you hold, and the period held.

This may include role such as course coordinator, teaching program director, higher degree research and honours coordinator, research section head, performance reviewer, etc.

Employee Evaluation

Answer *

Question 

Describe your contribution to advancing the University's Reconciliation Action Plan (RAP), the Athena SWAN Action Plan and any other University strategic initiatives.

Employee Evaluation

Answer *

Back Next

Employee Evaluation

Answer *

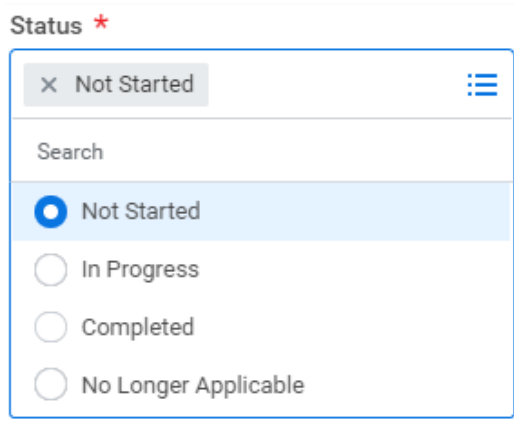
Format ▾ | **B** | *I* | U | A ▾ | :☰ | 🔗 | ↗

51. Click *Next*.

Back **Next**

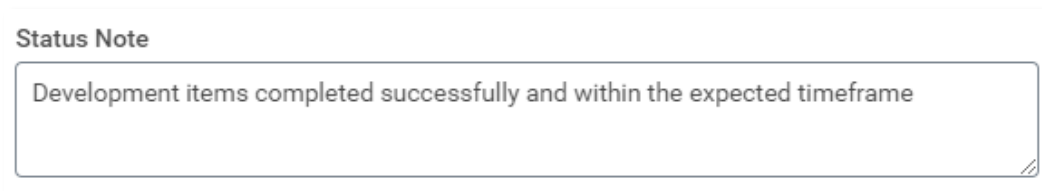
52. The next section is *Professional Development*. If this is your second or subsequent review, the development items from the previous review year will load. Click into the white space to start editing.

53. Update the *Status* of the development item.



The screenshot shows a dropdown menu titled "Status *". At the top, there is a button with an "X" and the text "Not Started" next to a hamburger menu icon. Below this is a search bar. The menu lists four options, each with a radio button: "Not Started" (selected with a blue dot), "In Progress", "Completed", and "No Longer Applicable".

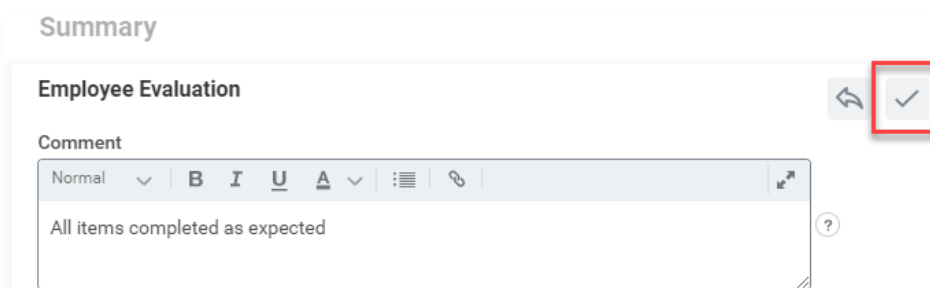
54. Update the *Status Note* with any additional information (not mandatory).



The screenshot shows a text area titled "Status Note". The text inside the box reads: "Development items completed successfully and within the expected timeframe".

55. Repeat steps 52 to 54 for all pre-loaded development items.

56. Once you have reviewed and updated all pre-loaded development items from the previous review year, update the *Employee Evaluation* with your assessment about the overall progress, including any limiting factors that impacted you. Select the tick box in the top right corner of the evaluation to save your changes.



The screenshot shows a form titled "Summary" with a section for "Employee Evaluation". In the top right corner of this section, there is a red box around a checkmark icon. Below the evaluation section is a "Comment" field with a rich text editor toolbar (Normal, Bold, Italic, Underline, Text color, Bulleted list, Link) and the text "All items completed as expected".

- 57. Once you have reviewed and updated all pre-loaded development items, click on the link at the top of the task for the Professional Development Template. Outside of Workday, complete the template.

Back in this task, click *Add* to summarise the agreed development items for the coming year click on *Add* to input development items for the next review year. Note: some of your development items may go over more than one calendar year in which case you can click Use Existing Development Item to select this type of development item from 2022 onwards.




The screenshot displays the Workday interface for adding a development item. On the left, a sidebar contains a form with the following sections: 'Development Item *' with a text input field; 'Additional Information'; 'Relates To' with a dropdown menu; 'Status *' with a dropdown menu; and 'Completed'. A red box highlights the 'Add' button, with a red arrow pointing to the 'Use Existing Development Item' modal form on the right. The modal form includes: a checkbox for 'Use Existing Development Item'; a 'Development Item *' text input field; an 'Additional Information' rich text editor with a toolbar; 'Relates To' and 'Category' dropdown menus; 'Start Date' and 'Completion Date' date pickers; a 'Status *' dropdown menu; and a 'Status Note' text area.

58. Enter the *Development Item*.

Development Item *

59. Enter any *Additional Information* relevant to the Development Item (not mandatory).

Additional Information

Format ▼ | **B** | *I* | U | A ▼ |  |  | 

60. Select what the development item *Relates To* (not mandatory).

Relates To


Search ☰

← All Competencies

- Judgement and Problem Solving (Competency)
- Knowledge (Competency)
- Oral Communication and Interpersonal Skills (Competency)
- Qualifications and / or Experience (Competency)
- Supervision Provided to Others (Competency)
- Supervision Received (Competency)
- Work Complexity (Competency)
- Written Communication (Competency)

61. Select the development item *Category* (mandatory).

Category

Search 

- Currency of practice / membership of professional association
- Other
- Professional Development
- Research
- Research Leadership and Excellence
- Service and Leadership
- Skill Enhancement
- Teaching


62. Enter the *Start Date* (not mandatory).

Start Date

DD/MM/YYYY 

63. Enter the *Completion Date* (not mandatory).

Completion Date

DD/MM/YYYY 

64. Enter the *Status*.

Status *

 Not Started
 In Progress
 Completed
 No Longer Applicable
Search

65. Enter a *Status Note* (not mandatory).

Status Note

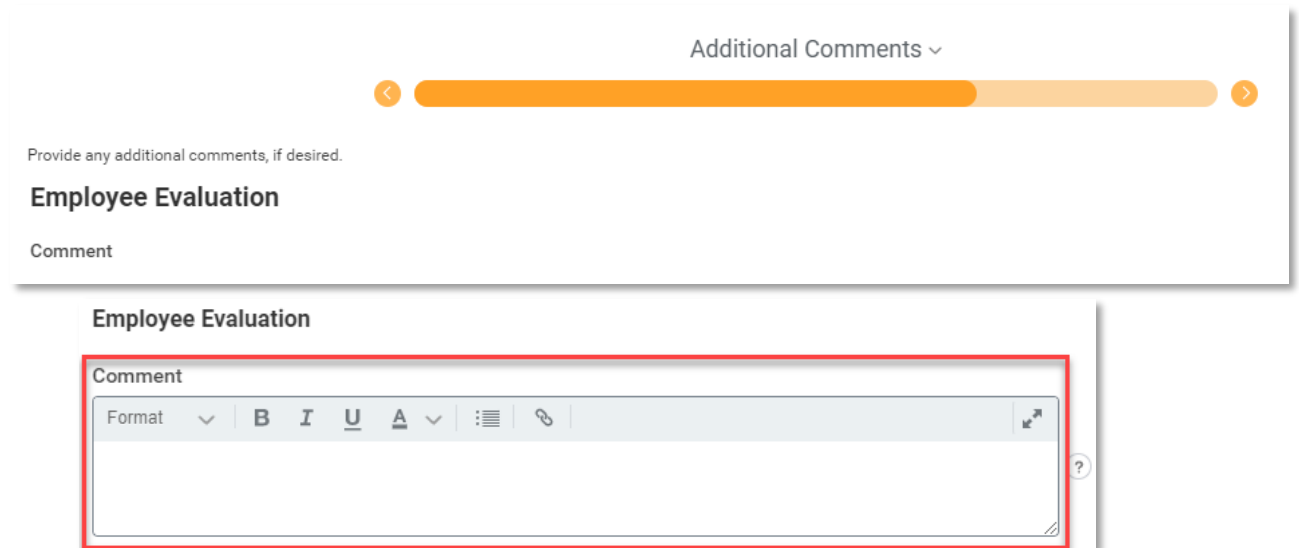
66. In the instance you have more than one development item to enter, click the *Add* icon and complete steps 57 to 66 until completed.

Add

67. Click *Next*.



68. The next section allows you to enter *Additional Comments*. Click into the task to add your comment (not mandatory).



69. Click *Next*.



70. The next section requires you to add *Supporting Documents*. Click *Add* to upload the required documentation.

Note: Each Performance Review will require the following documentation to be added individually:

- Up-to-date current Curriculum Vitae (all Academics).
- Full SET extracts for topics coordinated and taught into (Balanced and Teaching Academics).
- Completed Research Plan (template document from link in step 25) (Balanced and Research Academics).
- Completed Professional Development Plan (template document from link in step 57)(all Academics).

Supporting Documents ▾

◀ ————— ▶

Please upload following documentation:

- Up-to-date current Curriculum Vitae
- Full SET extracts for topics coordinated and taught into
- Completed Research Plan
- Completed Professional Development Plan

Employee

71. Click *Attach* to add the relevant document that is saved on your computer and add a *comment* as to what the document is. Continue adding until all required documentation has been added.



Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

Upload Date
(empty)

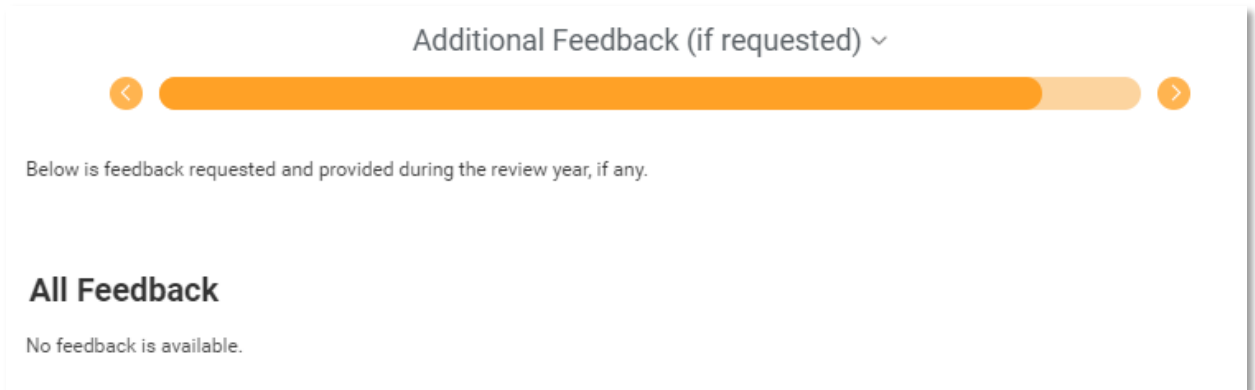
Comment

72. Click *Next*.



Back **Next**

73. The next section is *Additional Feedback (if requested)*. Note: If no feedback had been requested by yourself from your supervisor, this step will state “No feedback is available”. This step is to review feedback only.



74. Click *Next*.



75. The final section is the *Summary* - this screen (image next page) shows the information entered in all previous sections listed as a summary. Read through the summary to ensure all information entered is correct. 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.



Making a Difference - The 2025 Agenda

VISION: To be internationally recognised as a world leader in research, an innovator in contemporary education, and the source of Australia's most enterprising graduates.

MISSION: Changing lives and changing the world.

The Academic Staff Performance Review Scheme is designed to regularly review the performance and the professional development of staff. The objectives of the Scheme are to:

- Assist staff to develop academically and professionally and to provide them with reliable information on the University's expectation of performance;
- Assist the University and staff jointly to plan the work of staff to achieve desired goals; and assist supervisors in monitoring and assessing a staff member's performance.

All staff at Flinders are responsible for understanding their obligations and responsibilities as set out in the University's code of conduct, the [Enterprise Agreement](#) and the University's [Values and Ethos](#).

This form will be accompanied by a Supplementary data document containing relevant data from University systems. There will be opportunities for you and your supervisor to:

- Review past goals and reflect and respond on achievement of or otherwise
- Agree on goals and strategies for coming year and professional development opportunities.

Teaching & Related Duties - Goals

Guide Me

Goal *

Example Goal

Relates To

Knowledge (Competency)

Category

Teaching and Related Duties

Supports

Due Date

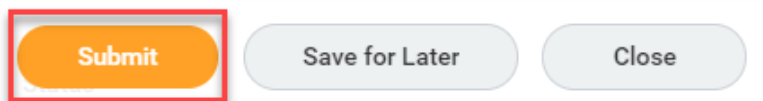


Submit

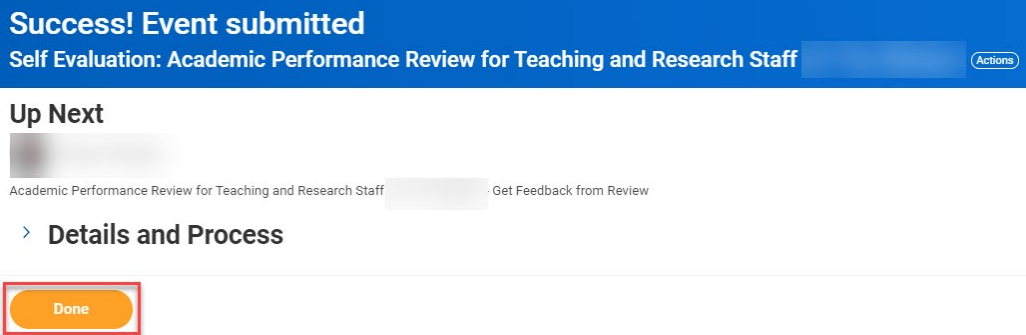
Save for Later

Close

76. Click *Submit* once happy with all sections.



The *Success! Event submitted* screen will appear with an Up Next task to your supervisor for *Academic Performance Review*.



77. The final part of the academic review is to acknowledge your supervisor’s evaluation. A *Manager Evaluation: Academic Performance Review: Provide Employee Review Comments* task will appear in your inbox. This task is for you to supply your acknowledgement of the review.

Inbox

Actions Archive

Viewing: All Sort By: Newest

Manager Evaluation: Academic Performance Review for Teaching and Research Staff
4 minute(s) ago - Effective 31/12/2021

Provide Employee Review Comments
Manager Evaluation: Academic Performance Review for Teaching and Research Staff

Evaluated By
4 minute(s) ago - Effective 31/12/2021

Review Period
01/01/2021 - 31/12/2021

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

- Disclosed all actual, potential or perceived conflicts of interest in accordance with University policy and recorded them on the university's [Conflict of Interest register](#).
- Read and understand the University's values and code of conduct and agree to abide by them.
- Taken the opportunity of this Performance Review to raise any questions where you have needed clarification on any aspects regarding the University values and code of conduct.
- Read and understand the contents of this completed performance review and that you:
- Have answered all questions truthfully and have not withheld any relevant information; and
- Agree with the future goals and strategies and planned professional development activities set out and will undertake your best endeavours to achieve them.

Acknowledgement

Employee Acknowledgement

Status *

Comment

Submit Save for Later Close

Select the *Status* to Acknowledge Review without or with comments. Add *Comments* if 'with comments' is selected.

Acknowledgement

Employee Acknowledgement

Status *

Search

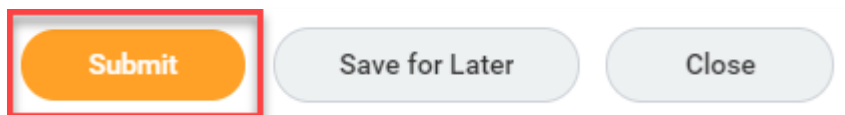
- Acknowledge Review without Comments
- Acknowledge Review with Comments

Comment

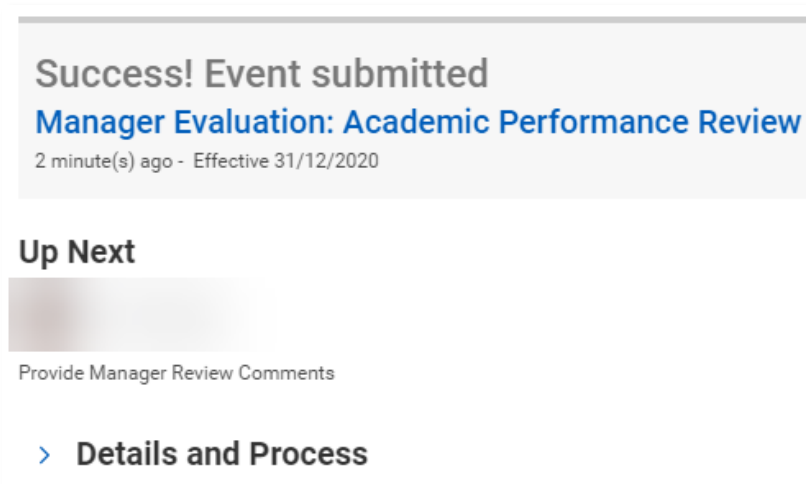
Format B I U A

78. Once all comments are added (if selected) 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.

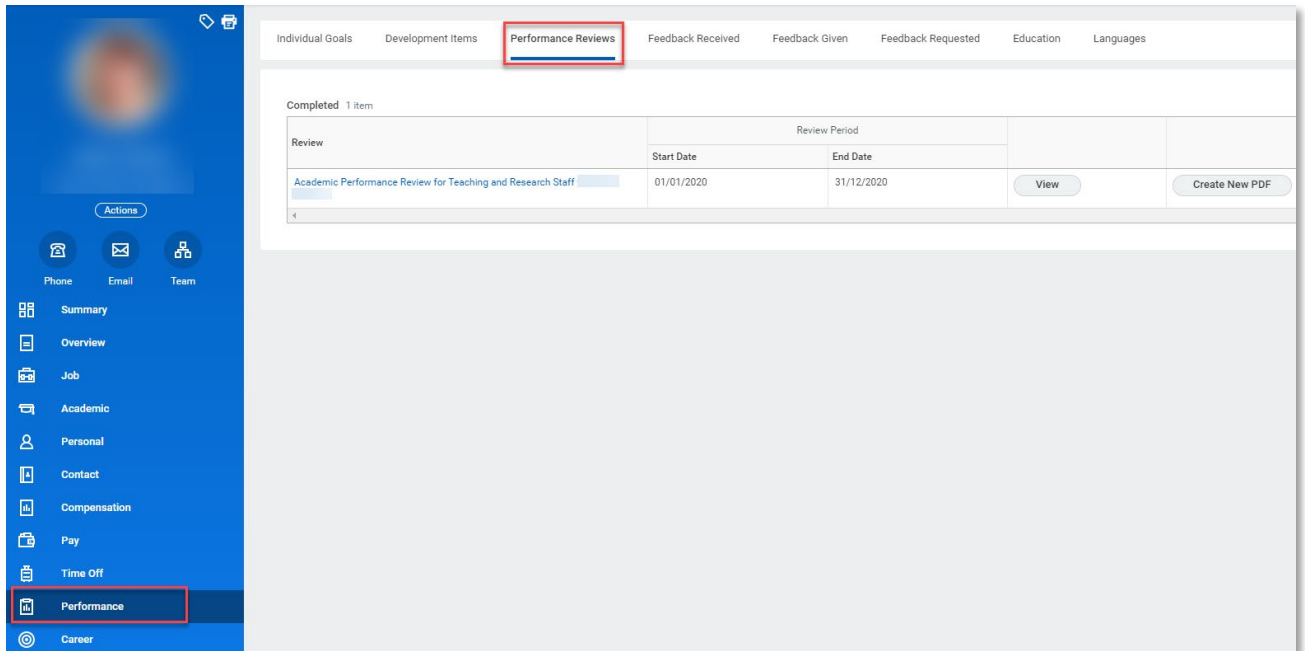


79. Once the *Manager Evaluation* task is submitted, the Up Next task is with the supervisor to *Provide Manager Review Comments*. This is the supervisor's acknowledgement of review task.



Once your supervisor acknowledges the review, the performance review process is completed 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		
Academic Performance Review for Teaching and Research Staff	01/01/2020	31/12/2020		

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.

Create New PDF

