



OKLAHOMA
Office of Management
& Enterprise Services

AAA Memo: HCM 2024-03

Date: May 24, 2024

To: All Appointing Authorities

From: Emily Roberson, Chief Human Resources Officer

Re: New Performance Review Process in Workday@OK

Beginning **June 1**, a new performance review process will be available in Workday@OK.

About the new process

Starting in June, state agencies across Oklahoma will begin the transition to a new and improved performance review process in Workday@OK. This transition will take place gradually, aligning agencies with the new process between June 2024 and March 2025.

The new process, named Performance Review 2.0, will replace the current process (Performance Review 1.0) in Workday@OK. This improvement is aimed at offering greater efficiency and convenience to Human Resources staff and managers.

With Performance Review 2.0, managers can expect:

- No more:
 - Placeholder steps for Human Resources.
 - Reviews open for a whole year.
 - Ad-hoc templates.
- Improvements include:
 - Templates: Beginning year, mid-year and year-end.
 - Content visible in mid-year review; overall rating is the only required element, but comments are possible on all content.
 - Able to use calibration on both mid-year and year-end.
 - Help text for **Skip Task** on the **Review Content** step.
 - Added **Not Rated** option to the **Competency** rating scale.
 - Eligibility rule changes (June 1 for both business processes):
 - Allow for agency executive management and agency director role.
 - Exclude temporary and seasonal employees.
- **Important note:** Do not overlap start and end dates on templates or content will not carry over to the next template.
 - Examples:
 - Beginning year, July 1, 2024, to Nov. 30, 2024.
 - Mid-year, Dec. 1, 2024, to May 31, 2025.
 - Year-end, June 1, 2025, to June 30, 2025.

- Tip: Make the start date for the beginning year and end date for the year-end reflect the 12-month review period.
- **Dates cannot be corrected after a template has been started.**

About the transition

Starting June 1, agencies may begin transitioning to the new process. As new performance reviews are launched, agencies should use 2025 templates with the new workflow. All agencies are expected to implement the new process as they launch their new reviews for fiscal year 2025 and calendar year 2025 and anything in between.

Previously initiated performance reviews can still be closed out using the current Performance Review 1.0 process. To allow in-progress reviews to close throughout the remainder of this calendar year, both processes will remain active in Workday@OK. Performance Review 1.0 will be deactivated in the first quarter of calendar year 2025. All 2025 templates will use the new workflow. **If agencies are beginning a new review period on July 1 or later, the new Performance Review 2.0 process should be utilized by selecting the 2025 Beginning Year template.**

What's next?

To ensure a smooth transition, OMES will offer ample resources and support to aid agencies through the change.

1. **Week of June 3** – A communication will be sent with the following:
 - a. Performance review process training guides reflecting updates to the process.
 - b. Date for Train the Trainer webinar and process demos hosted by OMES Human Capital Management (HCM).
 - c. Office Hours for Human Resources provided by OMES HCM during the month of June.
2. **Week of July 1** – A communication will be sent with the following:
 - a. Talent calibration training guide and best practices.
3. **March 2025** – Performance Review 1.0 will be deactivated in Workday@OK.

This AAA Memo intends to raise awareness of the upcoming change. If you have questions in the meantime, please email Tasha Riley, director of Talent Management, at natasha.riley@omes.ok.gov.