

Description: This job aid provides instructions on how to review and provide feedback to staff for mid-year review.

Applies to: Faculty and Staff Managers

Note: Fields not specified in this document are to be skipped or left blank.

The mid-year review process begins with staff completing self-evaluation questions in Workday. When staff have completed the form, you will receive an email and an Inbox Action item.

FIND EMPLOYEE'S SELF-EVALUATION

When employees submit their completed evaluation, you will receive an email notification. Log in to Workday and go to the Inbox.

Note: Your staff will request their job descriptions from you if needed.

1. Select **Manager Evaluation: Mid-Year Review**.

The screenshot shows an 'Inbox' interface with a 'Complete Manager Evaluation' action item. The item title is 'Manager Evaluation: Mid-Year Review_9.23.22:' and it includes a 'Review Period' of '07/01/2022 - 06/30/2023'. Below the title, there is a paragraph of text explaining the review process. At the bottom, there are two buttons: 'Go to Guided Editor' (labeled 'a') and 'Go to Summary Editor' (labeled 'b'). A red circle with the number '1' is placed over the action item title, and a red circle with the number '2' is placed over the 'Go to Guided Editor' button.

2. Click **Guided Editor**.

- a. **Guided Editor** shows additional help text and displays one section at a time.
- b. **Summary Editor** shows all sections on one page.

REVIEW AND PROVIDE FEEDBACK

The self-evaluation has three sections Performance to Date, Future and Overall. sections with a total of 7 questions.

*Note: Be aware that employees will be able to view any comments you enter and **Save for Later**.*

1. Evaluation Questions

- a. Click the pencil icon to add your feedback.
- b. The employee’s answers are shown.
- c. Enter your response in the space provided.
- d. Click the check mark when finished.

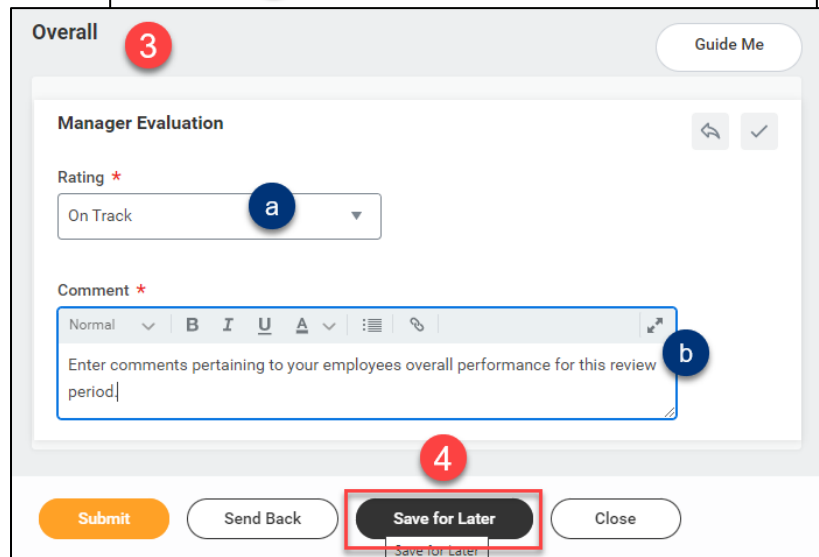
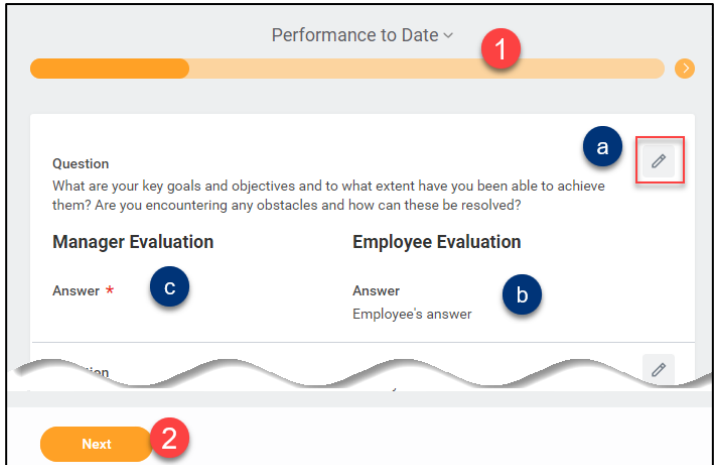
Repeat steps a-d for each question in this section.

2. Click **Next to move to the Future section and repeat steps a-d for each question.**

3. Overall

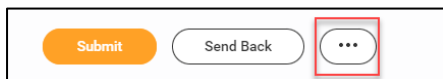
- a. Select a **Rating**, On Track or Not On Track, for the employee’s mid-year progress toward their objectives.
- b. Enter a comment pertaining to the employee’s overall performance for this review period.

Optionally, you may **Send Back** if you need additional information (see **Send Back for Additional Information** section below)



4. When you are finished with feedback, click **Save for Later.**

- If you do not see the Save for Later button, click the ellipsis.



*Note: Do not click **Submit** until you have met with your employee. You will not be able to edit any answers or change the rating.*

Next Steps: Schedule a meeting for you and your employee to discuss the review and rating. You may return to the evaluation and edit if necessary.

×

Event saved. Awaiting submission

Up Next: | Complete Manager Evaluation

[View Details](#)

Open

ACKNOWLEDGE AND FINALIZE THE REVIEW

1. After you meet with your employee, go to your Inbox, select the employee’s review and click **Continue where I left off**

2. Make any edits, if necessary then click **Submit**.

3. Review the **Additional Confirmation** statement then click the pencil icon to edit.
 - a. In the **Status** field select:
 - Acknowledge Review without Comments, or
 - Acknowledge Review with Comments.
 - b. Enter comments if necessary.
 - c. Click **Submit** to complete the process.

The process is complete when the employee submits their acknowledgement.

Provide Manager Review Comments
Manager Evaluation: Mid-Year Review: 3

I have reviewed and approved the performance review document.

Additional Confirmation:

- The job description was reviewed and updated, or will be reviewed and updated in the near future, should changes be necessary.
- The mid-year review has been fully completed.
- Ongoing check-in meetings have taken place or will be scheduled.

Acknowledgement

Manager Acknowledgement ↶ ✓

Status *

× Acknowledge Review with Comments

Comment

Format v **B** *I* U A v ☰ 🔗 ↶ ↷

Enter final comments.

Submit
Save for Later
Close

SEND BACK FOR ADDITIONAL INFORMATION

If you require additional information from the employee, you may send it back to them for editing.

1. Click **Send Back** at the bottom of the form.

The screenshot shows two columns: 'Manager Evaluation' and 'Employee Evaluation'. The 'Manager Evaluation' column has an 'Answer' field with the text: 'Jane provided excellent support and training to two new employees. She has also completed the first set of courses toward her certification.' Below this is a partially visible question: 'Describe some opportunities for development in achieving your work objectives, job re...'. The 'Employee Evaluation' column has an 'Answer' field with the text: 'As of the start of this review period, I have trained 2 new employees, and started a course for certification.' At the bottom of the form are four buttons: 'Submit' (orange), 'Send Back' (black with white text, highlighted with a red circle and the number 1), 'Save for Later' (white with grey border), and 'Close' (white with grey border).

2. Describe the **Reason** you are sending this back in the box. Then click **Submit**.

The 'Send Back' dialog box has a title 'Send Back'. It contains a 'To' field with a dropdown menu showing 'Complete Self Evaluation' and a red circle with the number 2 next to it. Below the 'To' field is a 'Reason' field with a text input containing 'Please provide additional information,'. At the bottom are 'Submit' and 'Cancel' buttons.

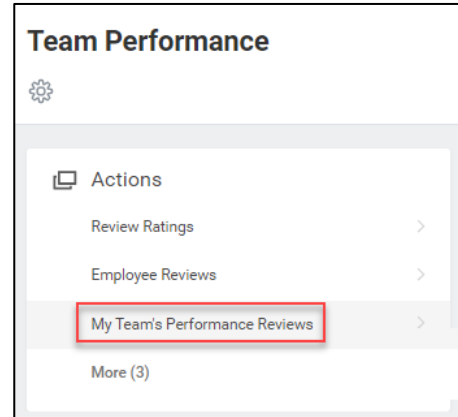
The employee will receive an inbox Action item.

VIEW PENDING AND COMPLETED REVIEWS

1. Open the Global Navigation menu on your Workday workscreen and select the **Team Performance** app.

The screenshot shows the 'Menu' overlay with two tabs: 'Apps' and 'Shortcuts'. Under the 'Apps' tab, there is a list of application icons and labels: 'Personal Information', 'Absence', 'Benefits', 'Recruiting', 'Recruiting Dashboard', 'Performance', and 'Team Performance'. The 'Team Performance' item is highlighted with a red rectangular box. At the bottom right of the menu, there is a 'Team Performance' button.

2. Select **My Team's Performance Reviews**.



3. Expand the **In Progress** and **Complete** sections to see the reviews.

▼ In Progress
 1 item

Worker	Performance Review	Current Step	Manager Rating	Employee Rating	Period Start Date	Period End Date	
	Mid-Year Review (Update Questions):	Provide Employee Review Comments - Employee As Self	On Track		07/01/2022	06/30/2023	Send Back

▼ Complete
 3 items

Worker	Performance Review	Manager Rating	Employee Rating	Period Start Date	Period End Date
	Mid-Year Review_9.23.22:	On Track		07/01/2022	06/30/2023
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		01/01/2021	06/30/2022
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		07/01/2021	06/30/2022

If a section is blank, that indicates that there are no reviews either In Progress or Completed.