PERFORMANCE REVIEWS
COMPLETE MID-YEAR REVIEW – MANAGER EVALUATION

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

Applies to: Managers with staff direct reports

Notes: Your staff may ask you for a copy of their job description if they are not able to access their job description in Workday.

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

The mid-year review process begins with direct reports completing their self-evaluation in Workday. When staff have completed their form, you will receive an action item in Workday.

REVIEW EMPLOYEE SELF-EVALUATIONS AND PROVIDE FEEDBACK

1. Select **Manager Evaluation: Mid-Year Review (year): Employee Name**. Click the **Get Started** button.

2. You will be able to review your direct report's answers and respond to them in the **Answer** field. All five questions require a response.

3. Click **Next** to advance or **Save for Later** to continue working on the review without losing your answers.

4. Choose **On Track** or **Not on Track** from the **Rating** dropdown and add comments in the **Comment** field. *Comments are required*. When you are finished entering your feedback, click

Save for Later. *Note: DO NOT click Submit until you have met with your direct report(s). You will not be able to edit any answers or change the rating.*

5. Schedule a meeting for you and your direct report to discuss the review and the rating. You may return to the evaluation and edit if necessary after your in-person one-on-one.

SEND BACK FOR CHANGES

1. If you need to send the self-evaluation back to your direct report for changes, click the **Next** button on the **Overall** rating screen and choose **Send Back**.

2. Enter the reason you are returning the evalaution then click submit. When your direct report completes their edits, you will receive a new action item to complete their mid-year review.

COMPLETE MID-YEAR REVIEW

1. Once you and your direct report have discussed their self-evaluation and your feedback and evaluation, click the **Submit** button.

2. Your direct report will receive a task to acknowledge their mid-year performance review. Once they have completed their acknowledgement, you will receive an action item **Manager Evaluation: Mid-Year Review (year): Employee Name**. Click the **Get Started** button.

3. The task will contain the self-evaluation, your responses and evaluation, and the acknowledgement from your direct report. Review the items, then click **Next**.

4. In the **Status** field, choose **Acknowledge without Comments** or **Acknowledge with Comments** from the drop down menu. If you selected Acknowledge with Comments, enter your comments in the field. Then click **Submit**.
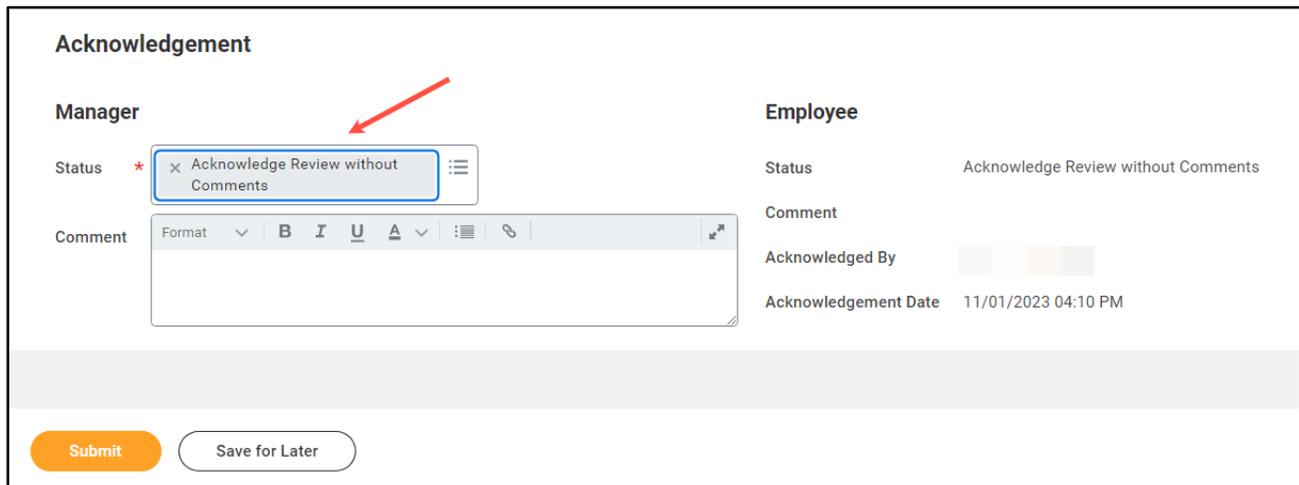
5. The mid-year evaluation process is complete only when both manager and direct report have acknowledged the evaluation in Workday.