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.

1. Select Manager Evaluation: Mid-Year Review.

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.

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.

**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.
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.

   ![Send Back Form]

   1. **Manager Evaluation**
      
      Answer: Jane provided excellent support and training to two new employees. She has also completed the first set of courses toward her certification.
      
      Describe some opportunities for development in achieving your work objectives: job-related.

   2. **Employee Evaluation**
      
      Answer: As of the start of this review period, I have trained 2 new employees, and started a course for certification.

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

   ![Reason Form]

   2. **Send Back**
      
      To: Evaluation
      
      Reason: Please provide additional information

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.

   ![Global Navigation Menu]

   Menu
   
   Apps  
   
<table>
<thead>
<tr>
<th>Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence</td>
</tr>
<tr>
<td>Benefits</td>
</tr>
<tr>
<td>Recruiting</td>
</tr>
<tr>
<td>Recruiting Dashboard</td>
</tr>
<tr>
<td>Performance</td>
</tr>
</tbody>
</table>

   Team Performance

   The employee will receive an inbox Action item.
2. Select **My Team’s Performance Reviews**.

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

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