

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.

The screenshot displays the Workday Manager Evaluation interface. It features three questions, each with a 'Manager' and 'Employee' answer field. The 'Employee' answer fields contain the text 'test'. Red callouts point to the 'Employee' answer fields, the 'Manager' answer fields, and the 'Next' button. The 'Next' button is highlighted in orange. The bottom navigation bar includes 'Back', 'Next', 'Save for Later', and 'Close' buttons.

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

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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.*

Overall

Do not Submit until you have met with your staff. You will not be able to edit any questions.

- Click **Save for Later** when you are finished with your feedback.
- **Schedule a meeting** for you and your staff to discuss the review and rating. You may return to the evaluation and edit if necessary.
- If not on track, identify the specific areas that need improvement and the steps necessary to resolve these items over the next six months.

Manager

Rating * On Track

Rating Description (empty)

Comment * Test

Back Next Save for Later Close

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 evaluation then click submit. When your direct report completes their edits, you will receive a new action item to complete their mid-year review.

Send Back

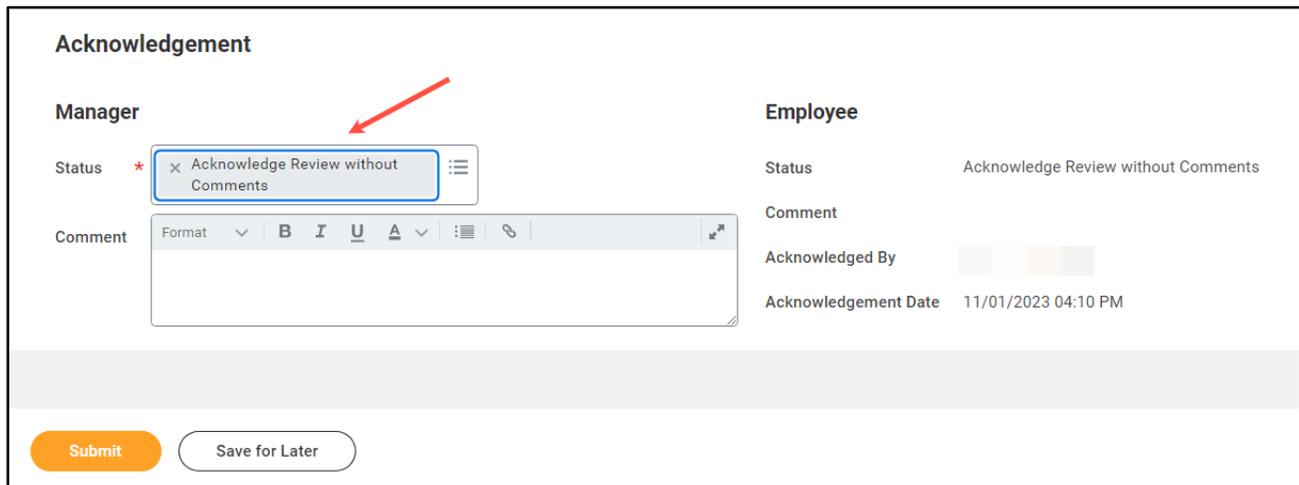
To * Complete Self Evaluation

Reason * Test

Submit Cancel

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**.



Acknowledgement

Manager

Status * ⌵ Acknowledge Review without Comments

Comment Format B I U A ☰ 🔗

Employee

Status Acknowledge Review without Comments

Comment

Acknowledged By

Acknowledgement Date 11/01/2023 04:10 PM

Submit **Save for Later**

5. The mid-year evaluation process is complete only when both manager and direct report have acknowledged the evaluation in Workday.