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 evaluation 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.