PERFORMANCE REVIEW

COMPLETE MID-YEAR SELF EVALUATION

Description: This job aid provides instructions on how to complete the self-assessment questions for your mid-year review as well as find and print the completed review.

Applies to: Non-union or library staff eligible for annual salary increases.

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

BEFORE YOU BEGIN

Request a copy of your job description from your manager if you do not have one already.

ACCESS THE SELF EVALUATION

1. Select Self Evaluation: Mid-Year Review and click the Get Started button.

Inbox	
Actions Archive	Complete Self Evaluation: Self Evaluation: Mid - Year Review 2023: 📃 🚥 📩 🙀 👜 👳
Viewing: All Viewi	Review Period 07/01/2023 - 12/31/2023 7 day(s) ago - Effective 12/31/2023
Self Evaluation: Mid - Year Review 2023:	As part of this year's performance management process, please complete the following form and discuss it with your manager. Your input in the review process is impor- tant. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals.
	Timeline for 2023 Year-End Annual Performance Reviews
	 On October 25, 2023 Mid-Year Review training began for managers and staff. On November 13, 2023 the Mid-Year Review process will open and all eligible staff will be able to complete self-evaluations. On November 27, 2023, If self evaluation is not completed it will be advanced to the manager. On December 8, 2023, the Mid-Year Review process will end. This means that all self-evaluations and manager evaluations must be completed and submitted in Workday by December 8.
	Training: <u>Manager and Staff Annual Review Training</u> is available now through April. For other information please visit the <u>TAP Website</u> .
	Locating Previous Performance Reviews in Workday:
	Job Aids are available to locate previous performance reviews in workday.
	Get Started

COMPLETING THE SELF-EVALUATION QUESTIONS

1. In the free form text field, type the answer in the space provided. Be sure to answer the questions with as much detail as possible. Click **Next** to move on or **Save for Later** to complete at a later date without losing your answers.

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Answer A	BIUAV	, ∷≣		R _M	
Test				là	
Question What accomp	olishments are you mos	t proud of so far this year	? Are there areas that you feel	you can improve on?	
Employee					
Answer * Normal ~	BIUAV	√ :≣ %		K _M	
Test				10	
Question Describe how	v your work has contribu	ited to the University and	department mission and/or DI	El objectives (where applic	able)?
Employee					,
Answer * Normal ~	BIUAV	∕ :≣ ⊗		K M	
Test		_			
		Clic	k Save for		

2. When all questions have been answered, click **Submit**. You will receive a notification your mid-year has been completed.

Success! E	vent submitted	
Up Next:	Mid - Year Review 2023: I	
Complete Mana	ager Evaluation	
<u>View Details</u>	Your manager will receive	
	this task to	
	complete your	
	review	

Note: You will not be able to edit your answers once you click Submit.

Next steps:

Your manager will respond to your self-evaluation questions and schedule a meeting to discuss your evaluation.

1. If your manager requires additional information they can send it back for you to edit. You will receive a task. Click the **Get Started** button, then click **Next**, then scroll down to **View Comments** for more information.

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- 2. Click **Save for Later**, then open the Self-Evaluation task to make your edits. Edit your responses, click **Next**, then click **Submit**.
- **3.** After the one-to-one meeting, your manager will add comments, a rating of **on track** or **not on track**, acknowledge the confirmation statement and submit the evaluation.

ACKNOWLEDGE AND COMPLETE THE REVIEW PROCESS.

1. Once your manager completes and submits the review, you will see an action item to confirm that you and you manager completed the mid-year review process.

Awaiting	Your Action
	Manager Evaluation: Mid - Year Review 2023:

2. Click the Get Started button.

Inbox	
Actions Archive	Provide Employee Review Comments Manager Evaluation: Mid - Year Review 2023:
Viewing: All Vi	Evaluated By 1 minute(s) ago - Effective 12/31/2023 Review Period 07/01/2023 - 12/31/2023
1 minute(s) ago - Effective 12/31/2023	I acknowledge that my manager and I have reviewed and discussed the contents and evaluations of this performance review. 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.
	Get Started

- 3. Look over the answers you and your manager have provided, then click Next.
- 4. In the Status dropdown menu, you may choose Acknowledge Review without Comments or Acknowledge Review with Comments. If you choose the later, add your comments to the

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comment field, then click **Submit**. Once you click submit, you may not change your acknowledgement.

Acknow	ledgement	
Employee	e	
Status 材	Acknowledge Review with Comments	
Comment	Normal ∨ B I U A ∨ E S Normal V B I U A V E	12 ⁷⁰
	3	
Submit	Save for Later	

- 5. Your manager will also receive a task to acknowledge the review. Once they submit their acknowledgement, you will be able to see your review on your Workday profile. Click the **Performance** menu, then the **Performance Reviews** tab.
- To view your review in Workday, click the View button. To create a PDF of your review, click
 Create New PDF button; you will be able to print a downloadable copy of your review.

	Individual Goals Performance Reviews					
Actions	Completed 3 items					
	Review	Review Period Start Date	Review Period End Date	Manager Rating	View Review 🖌	Create Review PDF
Email Team	Mid - Year Review 2023:	07/01/2023	12/31/2023		View	Create New PDF
Summary	Annual Staff Performance Review (Mgr)	07/01/2022	06/30/2023		View	Create New PDF
Overview	Mid-Year Review: I	07/01/2022	06/30/2023		View	Create New PDF
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