

**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.

**Note:** Your staff will request their job descriptions from you if needed.

### 1. Select **Manager Evaluation: Mid-Year Review**.

The screenshot shows the Workday Inbox interface. On the left, there's a sidebar with 'Actions' and 'Archive' tabs, and a search bar. The main area displays a list of items. The first item is 'Manager Evaluation: Mid-Year Review\_9.23.22:' with a red circle '1' next to it. Below the list, the details of the selected item are shown. The title is 'Complete Manager Evaluation' and the subtitle is 'Manager Evaluation: Mid-Year Review\_9.23.22:'. There are icons for star, PDF, settings, and share. Below that, it says '56 second(s) ago - Effective 06/30/2023' and 'Review Period 07/01/2022 - 06/30/2023'. A paragraph of text follows: '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 important. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals'. At the bottom, there are two buttons: 'Go to Guided Editor' (labeled 'a') and 'Go to Summary Editor' (labeled 'b'). A red circle '2' is placed over the 'Go to Guided Editor' button.

### 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.

**Note:** Be aware that employees will be able to view any comments you enter and **Save for Later**.

**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.

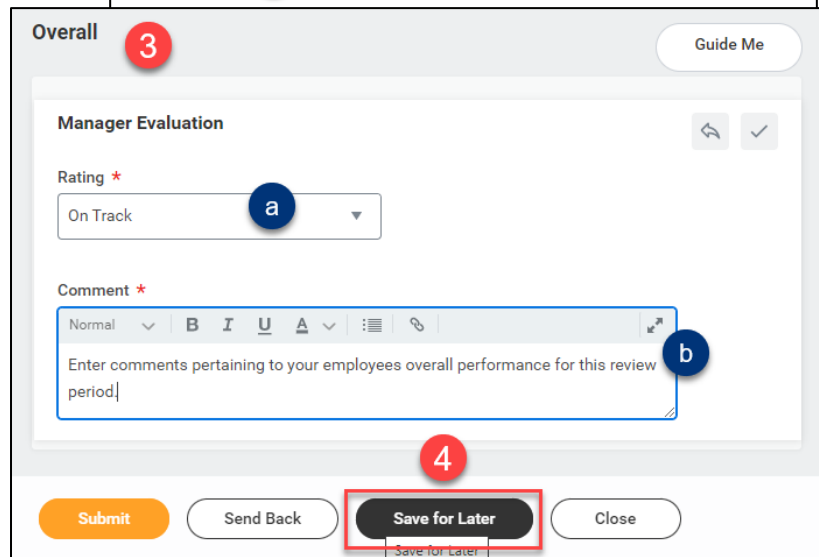
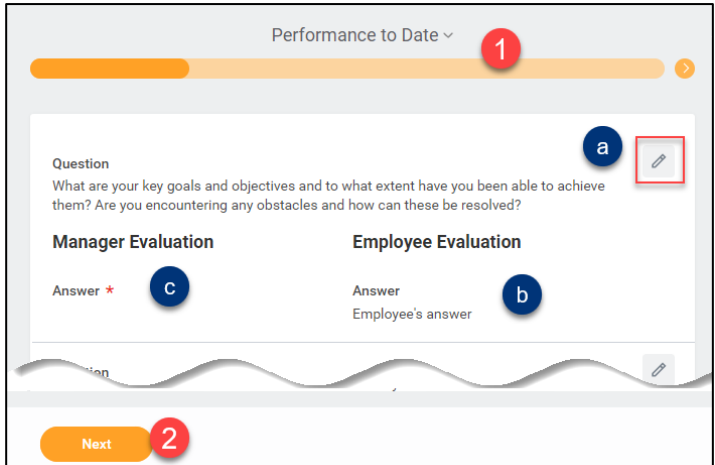
Repeat steps a-d for each question in this section.

**2. Click **Next** to move to the Future section and repeat steps a-d for each question.**

**3. Overall**

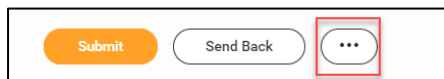
- a. Select a **Rating**, On Track or Not On Track, for the employee’s mid-year progress toward their objectives.
- b. Enter a comment pertaining to the employee’s overall performance for this review period.

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**.**

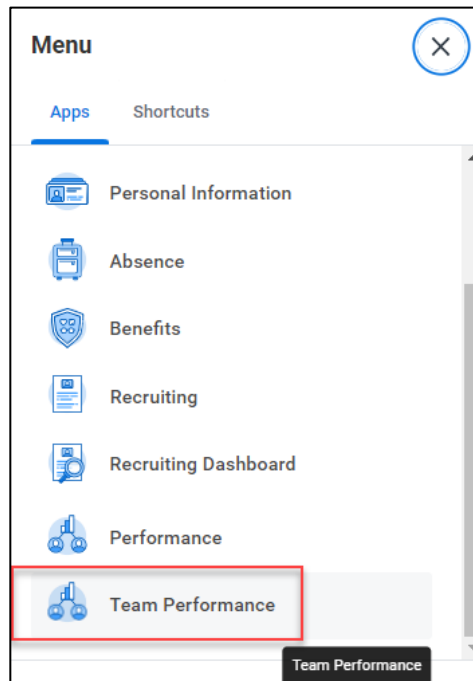
- If you do not see the Save for Later button, click the ellipsis.



**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.

## VIEW PENDING AND COMPLETED REVIEWS

1. Open the Global Navigation menu on your Workday workscreen and select the **Team Performance** app.



2. Select **My Team's Performance Reviews**.

### Team Performance

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📄 Actions

- Review Ratings >
- Employee Reviews >
- My Team's Performance Reviews >
- More (3)

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

▼ **In Progress**

1 item

Worker	Performance Review	Current Step	Manager Rating	Employee Rating	Period Start Date	Period End Date	
	Mid-Year Review (Update Questions):	Provide Employee Review Comments - Employee As Self	On Track		07/01/2022	06/30/2023	Send Back

▼ **Complete**

3 items

Worker	Performance Review	Manager Rating	Employee Rating	Period Start Date	Period End Date
	Mid-Year Review_9.23.22:	On Track		07/01/2022	06/30/2023
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		01/01/2021	06/30/2022
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		07/01/2021	06/30/2022

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