

How Does the Midyear Review Process Work?

You and your manager will use the online forms contained in *myPerformance* to document the progress towards meeting your goals and your midyear review discussion. In this guide, you will learn about the process and how to complete the form.

1. Getting Started

Your manager will let you know when it's time to document your progress towards meeting your goals on the Midyear Review Form and have a meeting. At that point, a **Midyear Review Form** will be available for you to access in your *myPerformance* inbox.

To access the form, follow these steps:

- Click **Home** in the upper-left corner of the screen.
- Click **Performance Forms** from the drop-down menu.
- Click the link to your **JHU Midyear Review Form** from the list of forms.

Please note: you and your manager can both enter comments into the form once it becomes available. If you and your manager try to access the form at the same time, you will receive a message to try again later.

2. Navigating the Midyear Review Form

At the top of the form, you can see the major sections of the form (i.e., Route Map, Employee Information, Goals and Major Responsibilities, Core Values, Overall Comments, and Signatures). You can select these links to jump quickly down into a specific section of the form.

The form shows the employee information, which is populated automatically from SAP. If you see any errors, contact your HR Rep to have them corrected.

Next, you'll see the "Route Map" which shows the steps in the Midyear Review process, as well as the step that you are currently in. This can be helpful if you're not sure about the status of a form within *myPerformance*.

Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
FY17 JHU Midyear Review for Edward Employee	Edward Employee	Write Comments	07/14/2017		01/01/2017	06/30/2017	06/30/2017	01/09/2018	Johns Hopkins SuccessFactors System	
FY17 JHU Annual Review for Edward Employee	Edward Employee	Write Comments	07/14/2017		07/01/2016	06/30/2017	06/30/2017	09/29/2017	Johns Hopkins SuccessFactors System	
FY18 JHU Midyear Review for Edward Employee	Edward Employee	Manager Writes Midyear Comments	12/15/2017		07/01/2017	01/01/2018	01/31/2018	01/09/2018	Edward Employee	

Back to Inbox
FY18 JHU Midyear Review for Edward Employee

Edward Employee

Route Map Employee Information Goals and Major Responsibilities Core Values Overall Comments

Route Map

1 Employee Writes Midyear Comments 2 Manager Writes Midyear Comments 3 Employee Signature 4 Manager Signature 5 Completed

3. Adding Your Comments to the Midyear Review Form

Scroll down in the form and **enter your comments** in the Goals and Major Responsibilities, Core Values, and/or Overall Comments sections. At the midyear stage, no ratings are entered in the form – either by you or by your manager.

If you want to **edit or delete any of your goals**, you can select the pencil or trashcan icons next to each goal title. You can also add a goal by selecting + Add Goal. You should always consult with your manager before changing any of the information related to your goals.

At the bottom of the form, enter your overall comments, and then select **Save and Close**. Your manager will not be able to see your comments until you are ready to share them. When you are ready to share your comments, click **Share Comments with Manager**.

The screenshot shows the 'myPerformance' interface for a midyear review. It includes sections for adding goals, providing comments on those goals, and overall comments. At the bottom, there is a 'Route Map' showing the workflow steps: 1. Employee Writes Midyear Comments, 2. Manager Writes Midyear Comments, 3. Employee Signature, 4. Manager Signature, and 5. Completed. A 'Share Comments with Manager' button is highlighted in the final step of the route map.

*NOTE: Your form will not be shared unless you select **Share Comments with Manager** again on the next confirmation screen.

4. Have an In Person One-on-one Meeting With Your Manager

Your manager is required to conduct an in person one-on-one meeting with you to discuss any changes in strategic priorities, your goals and performance so far, and to provide feedback on areas that are going well or areas of concern or development.

5. Review Manager's Comments and Apply Your Signature

Once this meeting has taken place, your manager will share his or her comments with you. Your manager's comments will be visible immediately, at which time you can sign the form by selecting **Sign** if you agree and are ready.

Remember, you will be able to view completed forms by selecting **Performance Forms** from the Home dropdown menu and then selecting **All Forms** or **Completed**.

*NOTE: Your form will not be signed unless you select **Sign** again in the next confirmation screen.

The screenshot shows the 'Signatures' section of the performance review system. It includes a disclaimer: 'Signature does not imply agreement or disagreement. It is only an acknowledgement that the discussion occurred.' Below this, it states: 'After signatures have been added, a copy of this document will be sent to the employee's HR representative.' There are input fields for 'Employee:' (containing 'Edward Employee has not signed yet') and 'Manager:'. A rich text editor is provided for 'Edward Employee:'. At the bottom right, there are buttons for 'Cancel', 'Save and Close', 'Return to Evaluation', and 'Sign'. A red arrow points to the 'Sign' button.

The screenshot shows the 'Route Map' section of the performance review system. It displays a progress bar with five steps: 1. Employee Comments Complete, 2. Manager Comments Complete, 3. Employee Signature (highlighted with a blue circle), 4. Manager Signature, and 5. Completed. Below the route map, there is a 'Sign' section with a message: 'You're about to route this form to another person to gather signatures. This form is sent in read-only format, and goes to your recipient's Inbox. A copy of the form is also sent to your En Route folder.' A button 'Forward Form to Maggie Manager' is visible. At the bottom right, there are buttons for 'Cancel & Return to Form' and 'Sign'. A red arrow points to the 'Sign' button.

UPDATES:

- **Employees and managers can now send the form backwards from the Signature step.** “Return to Evaluation” sends the form back into the commenting stage. It will then require re-signing.
- **Embedded Help text to show who’s got control of the form.** In the Employee step, the Manager will see help text showing that the form is with the employee. In the Manager step, the employee will see help text showing that the form is with the manager. We’ve also included (for the manager) an explanation of how to use Ask for Feedback to ask others about the employee’s work.