

How Does the Midyear Review Process Work?

You and your employees will use the online forms contained in *myPerformance* to document their progress towards meeting their goals and midyear review discussions. In this guide, you will learn about the process and how to complete the form from a manager's perspective.

1. Getting Started

Please notify each of your employees when it's time for them to prepare for the Midyear Review and the date you will meet to discuss their performance. At that point, each employee will enter comments into a Midyear Review Form to report on the progress towards reaching his or her goals. The Midyear Review Form will be available from the *myPerformance* inbox.

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

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 employee's **JHU Midyear Review Form** from the list of forms.

Please note: the employee's comments are visible to you immediately. Your comments will only be visible to the employee when you decide to share them. It is recommended that you wait to share your comments with the employee until after the in person one-on-one meeting with the employee.

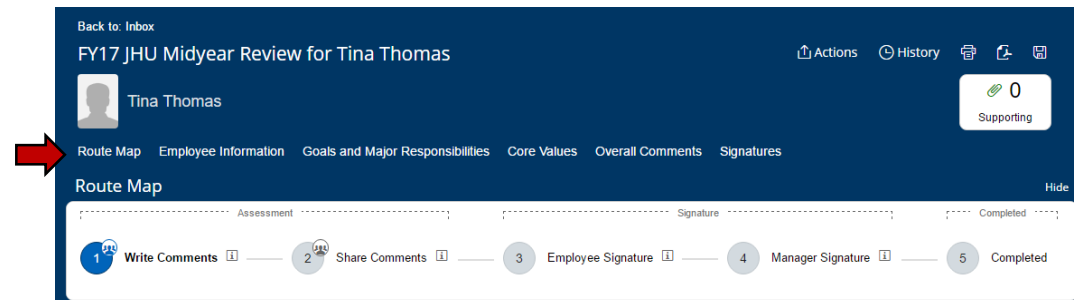
2. Navigating the Midyear Review Form

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 your employee's information, which is populated automatically from SAP. If you see any errors, contact your HR Rep to have them corrected.



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 Tina Thomas	Tina Thomas	Write Comments	11/07/2016		01/01/2017	06/30/2017	06/30/2017	11/07/2016	JHU Admin	



Back to: Inbox

FY17 JHU Midyear Review for Tina Thomas

Tina Thomas

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

Route Map

1 Write Comments 2 Share Comments 3 Employee Signature 4 Manager Signature 5 Completed

Next, you'll see a "Route Map" which shows the steps in the performance 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*.

3. Reviewing and Adding Comments to the Midyear Review Form

Scroll down the form and review the employee's midyear comments in the Goals and Major Responsibilities, Core Values, and/or Overall Comments sections. You will also **enter your comments** in the manager comments sections. At the midyear stage, no ratings are entered in the form – either by the employee or the manager. You may add your comments to the Midyear Review Form at any time, even if your employee has not yet added his or her comments.

If you want to edit or delete any of the employee's goals, you can do so by selecting 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 the employee before changing any of the information related to his or her goals.

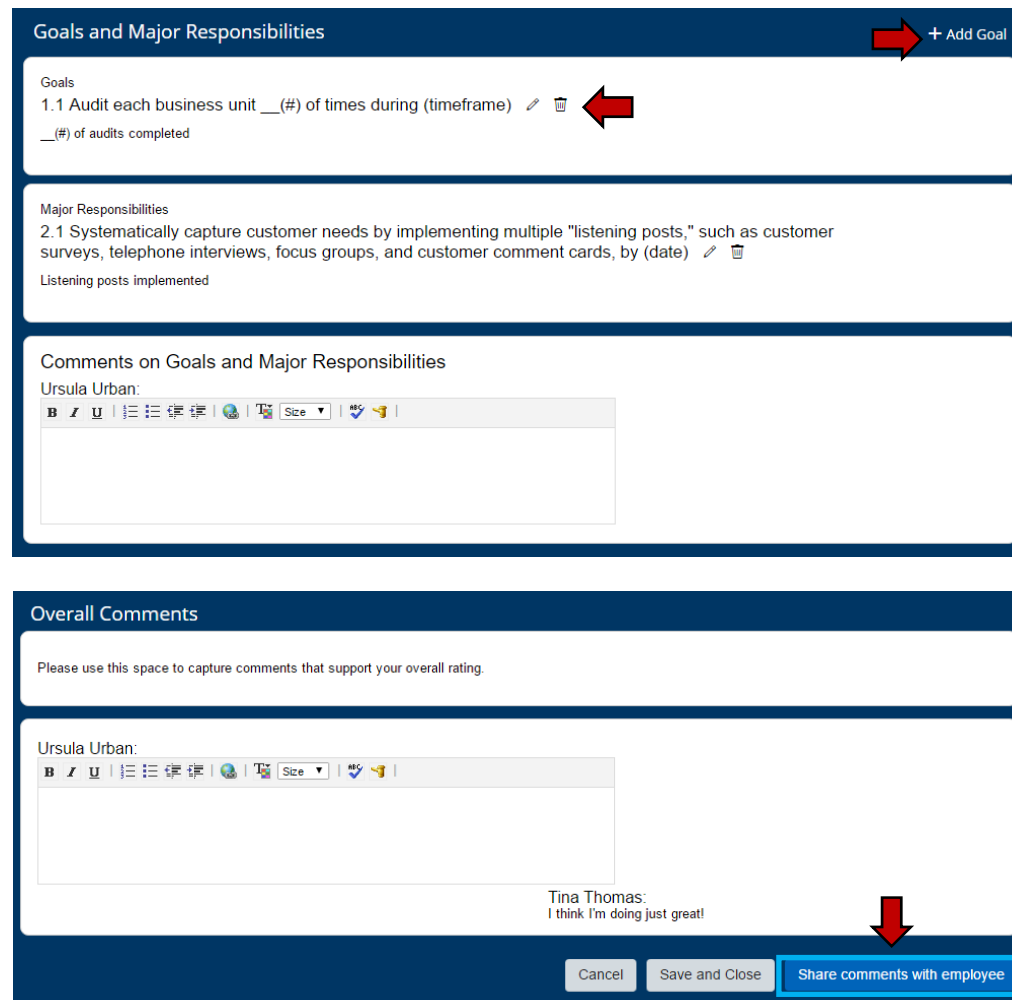
4. Have an In Person One-on-One Meeting With Your Employee

Managers are required to **conduct an in person one-on-one meeting** with employees to discuss any changes in strategic priorities, the employee's goals and performance so far, and to provide feedback on areas that are going well or areas of concern or development.

Conduct this meeting before finalizing and sharing your midyear review comments with the employee; your comments may change based on information gathered from your employee during the midyear review meeting.

5. Share Your Comments With Your Employee

Once you have met with your employee and you have finalized your comments, scroll to the bottom of the form and select **Share comments with employee**. This will move the Midyear Review Form to the Share Comments stage in the Route Map and your comments will be visible to the employee.



The screenshot displays the 'Goals and Major Responsibilities' section of the Midyear Review Form. It features a header with a '+ Add Goal' button. Below this, there are two main sections: 'Goals' and 'Major Responsibilities'. The 'Goals' section contains a goal titled '1.1 Audit each business unit __(#) of times during (timeframe)' with a pencil icon for editing and a trash can icon for deletion. The 'Major Responsibilities' section contains a goal titled '2.1 Systematically capture customer needs by implementing multiple "listening posts," such as customer surveys, telephone interviews, focus groups, and customer comment cards, by (date)' with a pencil icon for editing and a trash can icon for deletion. Below these sections is a 'Comments on Goals and Major Responsibilities' section, which includes a text area for comments and a rich text editor. The 'Overall Comments' section is also visible, with a text area for comments and a rich text editor. At the bottom of the form, there are three buttons: 'Cancel', 'Save and Close', and 'Share comments with employee'.

6. Confirm 1:1 Meeting

After the employee has reviewed your comments, you will scroll to the bottom of the form and select **Confirm 1:1 Meeting**. This button will only appear on the form after the employee has reviewed your comments and selected Save and Close.

Once the 1:1 meeting has been confirmed, the form will leave your *myPerformance* inbox and move to the employee's inbox for the **Employee Signature** stage in the Route map. You will not be able to access the form until the employee has electronically signed the form.

7. Apply Your Signature

After the employee has electronically signed the Midyear Review Form, it will be sent to your *myPerformance* inbox. Scroll down to the the bottom of the form and select **Apply Signature**. This will add your electronic signature and the Midyear Review Form and process is completed.

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

