

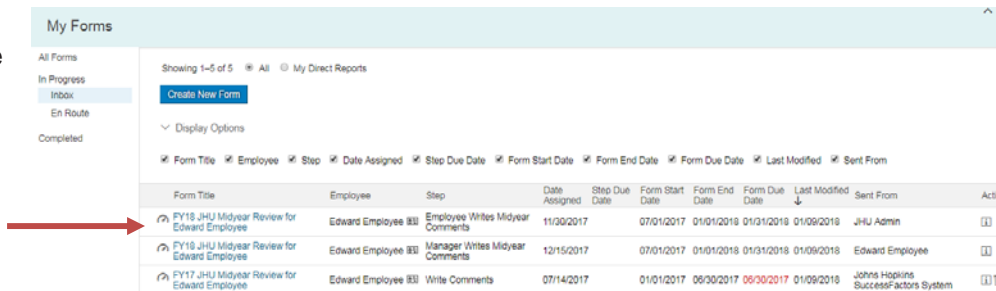
How Does the Midyear Review Process Work?

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.



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- 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 **Send to Employee for Review and Signature**.

Goals and Major Responsibilities

Goals

1.1 SalesForce

Goals

1.2 Sample Goal Name

To do a lot of things really well in a smart way.

Also, other things.

Goals

1.3 Cross Training Administrative Staff

Cross train all administrative staff on departmental processes by June 200X.

* Develop documentation and training materials by March 200X.

* Schedule monthly training sessions for all administrative staff by December 200X.

* Schedule rotational assignments and evaluate staff on all administrative functions by May 200X.

Major Responsibilities

2.1 Provide administrative support to assigned faculty and staff

Support commitment to customer satisfaction by providing high-quality, responsive administrative support to assigned faculty and our internal and external customers for the FY.

* Develop and distribute customer satisfaction survey by the end of the first quarter.

* Distribute survey and track responses on at least a quarterly basis.

Comments on Goals and Major Responsibilities

Maggie Manager

Edward Employee: On track.

Overall Comments

Please use the space below to capture any other comments about midyear progress.

Maggie Manager

Edward Employee: On track.

Cancel Save and Close Send Back to Employee for Editing Send to Employee for Review and Signature

*NOTE: Your form will not be shared unless you select **Send to Employee for Review and Signature** again on the next confirmation screen.

Back to: Inbox

FY18 JHU Midyear Review for Edward Employee

Route Map Hide

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

Send to Employee for Review and Signature ⓘ

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.

Forward Form to Edward Employee

Cancel & Return to Form **Send to Employee for Review and Signature**

6. 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 **Sign**. 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**.

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

Signatures

Signature does not imply agreement or disagreement. It is only an acknowledgement that the discussion occurred.

After signatures have been added, a copy of this document will be sent to the employee's HR representative.

Employee: Edward Employee 01/09/2018

Manager: Maggie Manager has not signed yet

Maggie Manager:

Cancel Save and Close Return to Evaluation **Sign**

Back to: Inbox

FY18 JHU Midyear Review for Edward Employee

Route Map Hide

1 Employee Comments Complete → 2 Manager Comments Complete → 3 Employee Signed → 4 Manager Signature → 5 Completed

Sign ⓘ

You're about to submit this form for completion. A copy of the form will be sent to your Completed folder.

Cancel & Return to Form **Sign**