User Guide - The Mid-Year Process
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Review the tutorials on the Performance Management website to review the Mid-Year User functions before using this guide. It will walk through all pages you see here.

All User’s Functions in Performance Management: Mid-Year Review

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The Mid-Year Process – Open Dates

- Goal Setting: July 1st - Aug 30th
- Mid-Year: Dec 1st - Jan 30th
- End of Year: May 1st - June 30th
The Mid-Year Process

- User has been or now needs to update their Progress Notes and their In-line Goal Progress

Manager/Employee
- Discusses goal status and progression

Employee
- Updates goal plan (if revisions are needed)

Manager
- Reviews
- Approves mid-year submission

Goal Plan
- Locked until end-of-year
- Progress notes and comments remain open

Employee
- Completes the mid-year attestation, saves
- Submits for approval
Updating the In-line Goals – Before Meeting with Your Manager

1. On the Home page.
2. Click Mid-Year Review
3. Click the conversation bubble graphic to update the in-line goal progress. Do this for all your goals
4. When done, use the orange arrow conversation button on the left to send your Manager your goal plan update, then meet to discuss.
Updating the Progress Notes – Before Meeting with Your Manager

1. User or Manager clicks on Progress Notes
2. Use dropdown to identify update Type
3. Give it a Title
4. Add the Description
5. Click Next
6. Click Upload in the next frame to add a scanned/pdf certificate, or related supporting document.

Both Managers and Staff Can See All Progress Notes Created.
The Mid-Year Review – Manager and Direct Report Meeting

- Discuss the progress of the Development Goals
- Discuss the progress of the Performance Goals
- ASK:
  - Are they still relevant to your role?
  - Do they still support the work of the unit?
  - To reach completion, are more resources or support needed?
  - Do they need to be Edited, or New goals added? This is the time to do it!

To Edit or Add Goals
1. Click Home
2. Click the Red Mid-Year box
3. Scroll to Goal to be Edited, Click Edit or click + Goal to make a new goal.
4. Be sure to Save

Review the 3-minute User-Goal Setting tutorial on the website, if needed.
The Mid-Year Review Attestation

After meeting with your Manager, make any adjustments to the goal plan discussed. Follow the Goal Setting tutorials if you have questions. Be sure to Save your work.
1. 2. and 3. Complete the Mid-Year Review by clicking the drop-down, click Yes. Add a comment if you choose.
4. Click Save.
The Mid-Year Review Submit

1. Notice the RED X at Mid-Year Review has turned to Green
2. Click Submit For Approval

If your manager tells you it needs revision, they will need to click Reject to unlock it. They will provide comments and return it for modifications. Once revisions are made, you will need to resubmit it again for final approval. This is an important step to prepare for End of Year review.
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