Self Service: Performance Management
Mid-Year Review

Overview

This document provides step-by-step instructions on the Mid-Year Review process. For a summary of this process, see the Employee Mid-Year Review Quick Start. You can also view the Employee: Completing Your Mid-Year Review online course.

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University Performance Management Process

For more information on Harvard’s performance management process, complete the The Performance Management Process: Feedback and Coaching Overview online course or contact your local HR office.

Mid-Year Review using PeopleSoft Performance Management

The Mid-Year Review provides a formal opportunity for managers and employees to evaluate progress toward goals and make any necessary adjustments. No rating is assigned to performance in the Mid-Year Review. Note: Completing the PeopleSoft Mid-Year Review process should not replace face-to-face meetings with your manager.

Workflow Guidelines for the Mid-Year Review

You and your manager can follow these guidelines during the Mid-Year Review:

   Your manager can view your Self Evaluation but cannot edit it.
2. Your manager enters an overall summary in the Manager’s Document and shares it with you.
3. You and your manager meet, then your manager confirms that you have met.
4. You acknowledge the Manager’s Document.
5. Your manager marks the Manager’s Document as Complete.

*Please follow your local school/unit’s timeframes for the various phases of the performance management process.

Navigating to Your Documents

You can access your documents through the Quick Links – Self Service menu.

Reviewing Your Goal Setting Document

Before you start writing the Self Evaluation document for the Mid-Year Review, you might want to view your Goal Setting document. The Goal Setting Document is a completed document that is accessible from the Annual Review link. Access the Annual Review documents via Quick Links – Self Service. This is the same page from which you access your Mid-Year Review.

Quick Links – Self Service

Employees who do not manage others have access to this Manager Self Service menu in case they temporarily need to serve as "acting manager" when their manager is on an extended leave. Do not use these links unless directed to by your local HR office.

The following screen displays when you do have performance documents assigned to you:

Access the Self Evaluation Document.
Access the Goal Setting Document.
Click Annual Review to access the Goal Setting Document. Click the View link beside the Goal Setting Document.

Need to Change Your Goal Setting Document?

Remember, you can view your goals but you cannot edit them when the Goal Setting document is in a status of Complete. If you need to edit your Goal Setting document, contact your manager to reopen it to allow you to make your changes. Once all changes are made, notify your manager. Your manager will mark the document Complete, which will reset it to view-only.

Note: If you have written any Performance Notes related to your accomplishments, you can review these by going to the My Performance Notes page. Refer to the Performance Notes work instruction for more information.

Navigating to the Mid-Year Review Documents

The Current Performance Documents screen displays the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee HUID</td>
</tr>
<tr>
<td>Document Type</td>
<td>Type of performance document:</td>
</tr>
<tr>
<td>Mid-Year Review</td>
<td>Assessment done at mid-year.</td>
</tr>
<tr>
<td>Annual Review</td>
<td>Yearly review.</td>
</tr>
<tr>
<td>Orientation Review Summary</td>
<td>New employee review.</td>
</tr>
<tr>
<td>Begin Date</td>
<td>Date review cycle begins.</td>
</tr>
<tr>
<td>End Date</td>
<td>Date review cycle ends (date review is due).</td>
</tr>
<tr>
<td>Job Code Description</td>
<td>Job description associated with the job code.</td>
</tr>
<tr>
<td>Note: This is your job code title, not your business title.</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>The status of the document. See pg. 4 for a list of status types.</td>
</tr>
<tr>
<td>Manager</td>
<td>Name of manager completing the review.</td>
</tr>
</tbody>
</table>

Access the Mid-Year Review documents by clicking Mid Year Review in the Document Type field (noted in red box in image above). The Document Details screen appears.

The Performance Document Details section displays details such as the Fiscal year and the Mid-Year Review dates.
The Document Progress section lists the steps that comprise the Mid-Year Review cycle. Unlike the Goal Setting process, in which only one document is completed, the Mid-Year Review process produces two separate documents:

- **Self-Evaluation Document** – You summarize and evaluate progress towards your goals so far during the year.
- **Manager’s Document** - Your manager evaluates reviews your self-evaluation and provides his or her own evaluation your progress.

The Status of the documents will be one of the following:

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Applies to Self Evaluation Document</th>
<th>Applies to Manager’s Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started – Not opened.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>In Progress – Edited but not Complete.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Share w/Employee – Your manager has shared the Manager’s Document with you.</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Met w/ Employee – You and your manager have met to review the Manager’s Document.</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Acknowledged – You have acknowledged the Manager’s Document.</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Completed – Completed and cannot be edited.</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Click Start to access the Self Evaluation document of the Mid-Year Review.

**The Mid-Year Review Self-Evaluation Document**

This graphic shows the Mid-Year Review Self-Evaluation Document and highlights the actions you take to complete the document.
Enter a summary of your accomplishments to date.

Mark the document Complete.

Save your entries.
Step 1 - Complete the Self Evaluation Document

Enter a summary of your performance up to this point into the Comments field of the Overall Summary section. There is no character limit in this field.

Use the Spell Check function to search for misspelled words and correct them. Remember to click after each update.

When you finish writing your Overall Summary, click at the top or bottom of the screen. Click again and then to confirm the completion of your Self Evaluation. The Document Progress section of the Document Details screen shows a status of Completed and your document is view-only. Your manager will receive a system-generated email that you have completed the document and it is ready to be reviewed.

Note: Your manager can reopen the Self-Evaluation document if you need to edit it. As long as the Edit action appears, you can continue to make changes to your document. When finished updating, remember to click Complete.
Step 2 – Review the Manager’s Document

Your manager adds comments to the Overall Summary of the Manager’s Document. You receive a system-generated email notifying you that the document is ready for your review. The Status on the Document Details screen becomes Share w/Employee.

Click View under the Review Manager’s Document step to view the Manager’s Document.

In the Manager’s Document, you can edit or add comments to the Employee Comments section. If your manager has added attachments, you can view them.

Review the Overall Summary

Review the comments your manager has added about your performance in the Overall Summary.

Edit Your Employee Comments, If Applicable

The Overall Summary section comments you added to your Self Evaluation appear in the Employee Comments section of the Manager’s Document. You can edit these comments until your manager marks the document as Complete.
Review Your Manager’s Comments, If Applicable

Your manager can add additional comments in the Manager Comments section. Review these if any appear.

*Note: Your manager can edit these comments until he/she marks the document as Complete.*

![Manager Comments](image)

View Attachments, If Applicable

You can view any attachments that your manager has chosen to share with you:

![Attachments](image)

**Steps**

1. Click the file name.
2. The file opens and you can then view it.

*Note: The process for opening a file differs according to the browser you are using. In some cases, you will need to access the pop ups; in other cases you may need to minimize the current browser window to see the file.*

After you have finished reviewing the Manager's Document, notify your manager in person or by email or in person that you have reviewed it.

Step 3 – Meet with Your Manager

You and your manager meet to discuss the review. After you meet, your manager will mark the document as Met with Employee. The Next Action column will change to Acknowledge.

![Next Action](image)

Step 4 – Acknowledge Your Review

After you meet with your manager, you will receive a system-generated request to acknowledge the review. Acknowledging the review is similar to electronically signing the review.

Acknowledge the review by clicking Acknowledge Review, then OK. Your manager will receive a system-generated email after you do so.

The Status becomes Acknowledged, as shown below.

![Acknowledged Status](image)

The manager then completes the review. Completing the Manager's Document is the final step in the process.
Viewing the Completed Documents

You will receive a system-generated email when your manager completes the Manager's Document. You can view the completed documents making up the Mid-Year Review in the My Historical Documents folder.

![Image of Performance Document History]

Your mid-year Employee Comments are saved as a performance note in the My Performance Notes page under the title FYXX-Mid Year – Comments, as shown below. You will be able to access these comments from your Self Evaluation Document for the Annual Review. For more information about the My Performance Notes page, see the Performance Notes work instruction.

![Image of My Performance Notes]

Printing the Documents

To print the documents, you'll be prompted to first create a .PDF file.

Steps

3. Click 📄 at the top of the Mid-Year Review document to create a .PDF file of the document.
4. The file opens as a PDF. You can then print it.

Note: The process for opening a PDF file differs according to the browser you are using. In some cases, you will need to access the pop ups; in other cases you may need to minimize the current browser window to see the file.
Frequently-Asked Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I access the goals I wrote during the planning phase?</td>
<td>The goals you wrote during the planning phase are in your Goal Setting Document, which you can access through Quick Links via Self Service&gt;Performance Management&gt;My Current Documents&gt;Annual Review. Click the View link beside the Goal Setting Document.</td>
</tr>
<tr>
<td>What happens to my Mid-Year Review documents if I transfer to another school or department?</td>
<td>Your HR administrator can transfer the document to your new manager, but whether this occurs will depend on your school or unit’s policies and the timing of your transfer during the annual review process.</td>
</tr>
<tr>
<td>What happens to my Self Evaluation Document after the Mid-Year Review process is complete?</td>
<td>The Self Evaluation Document and Manager’s Document are part of the Mid-Year Review, located in the My Historical Documents page in Self Service. You can view the documents, but you cannot edit them.</td>
</tr>
<tr>
<td>Can my manager reopen any of the documents in the Mid-Year Review after the process is complete?</td>
<td>No, your manager cannot reopen any of the documents in the Mid-Year Review after the process is complete.</td>
</tr>
<tr>
<td>Who can see the data in my Mid-Year Review documents?</td>
<td>After the Mid-Year Review process is complete, your direct manager, indirect managers, and HR administrator can view the data in your documents.</td>
</tr>
<tr>
<td>Does the data in my Mid-Year Review roll up to the Annual Review documents?</td>
<td>Your comments in the Employee Comments section become a note in the My Performance Notes folder in Self Service. You can access those notes when you are completing the Self Evaluation document for the Annual Review.</td>
</tr>
<tr>
<td>Will I be able to reopen my Self Evaluation document to edit it after I mark it as complete it?</td>
<td>Your manager can reopen your Self Evaluation after you complete it. Contact your manager to reopen the document if you need to edit it after it is complete.</td>
</tr>
</tbody>
</table>