

# Performance Management Help Guide & Overview - Midpoint Evaluations

The process begins with the manager.

*Step 1* - the supervisor should receive a task in their inbox that says, “Set Content: Midpoint Evaluation Staff - 2026: Employee Name.” It looks like this:

## Set Review Content

Set Content: [Midpoint Evaluation Staff - 2026:](#) [REDACTED]



Review Period 12/31/2025 - 12/31/2025

## UW Midpoint Performance Evaluation

- This documentation is only a portion of productive performance management.
- Performance evaluations are most effective when supported by conversation with the employee to ensure understanding.
- Frequent, informal conversations regarding performance further support employee and organizational success.

*Step 2* - Click the blue box that says, “Get Started.”

*Step 3* - A pop-up box may appear with the standard job responsibilities from the SJD. The job responsibilities should not be edited unless these don’t match; if they don’t match, please copy the standard job responsibilities over into the text fields. Those who find they don’t match would likely fall into two categories - either they were edited during the set-up period in Workday by the supervisor, or a job change occurred after the initial content was set. ***Unique responsibilities may be added.***

### Job Responsibilities

#### Adjust Responsibilities

- Review, edit, add, or delete responsibilities for this employee.
- To view the standard responsibilities from the job profile, click the View Related Information icon in the left panel.

*Step 4* - Fill out the “Goals” section as indicated in #7 of ‘set content’ in [this link](#). Once complete, click “Next.”

*Step 5* - Review and Submit.

## The process continues with the employee:

**Step 6** - Complete the self evaluation as described in [this guide](#).

**Step 7** - employees should not add or remove responsibilities, as outlined in the guide above.

Employees now have the ability to rate their performance on each responsibility, like this:

The screenshot shows a form titled "Employee" with the following fields:

- Rating**: A dropdown menu with a red asterisk and the selected option "Meeting Expectations".
- Rating Description**: A text field containing "Performance consistently meets the communicated expectations."
- Comment**: A text area with a rich text editor toolbar above it.

The "exceeding expectations" rating should be used sparingly. Here is a link to an explanation of the [performance ratings](#) in Workday. Click "Next" once each job responsibility receives a performance rating.

**Step 8** - Review goals and provide comments (optional). Click "Next."

**Step 9** - Midpoint Overall Evaluation and Rating for Non-Primary Job (*only for those with multiple jobs*).

**Step 10** - Review and "Submit."

## The process continues with the supervisor:

**Step 11** - the employee has now provided their own performance ratings, and once they have completed this, the task comes back to the supervisor. Click the blue box in your Workday task inbox that says "Get Started."

**Step 12** - the Job Responsibilities should appear here with a rating by the employee. The supervisor should also rate the employee using this [performance rating guide](#). Please note that "exceeding expectations" should be used sparingly. For example:

### Job Responsibilities

#### Evaluate Responsibilities

- If responsibilities have been rated in a previous evaluation, the rating and comment has carried over to this evaluation.
- **Rate/Update** employee performance in each area of responsibility.
- Add/Update comments as needed.
- Do not make any changes, additions, or deletions to responsibilities, as the employee has already provided a self-rating.

The screenshot shows a comparison of the supervisor's view for a responsibility. On the left, the "Manager" view shows:

- Responsibility**: A dropdown menu with "Normal" selected and a rich text editor containing a bullet point: "Audit [redacted] to ensure compliance with established policies and procedures".
- Rating**: A dropdown menu with "select one" selected.
- Rating Description**: A text field with "(empty)".
- Comment**: A text area with a rich text editor toolbar.

On the right, the "Employee" view shows:

- Rating**: A dropdown menu with "Meeting Expectations" selected.
- Rating Description**: A text field with "Performance consistently meets the communicated expectations."
- Comment**: A text area with a rich text editor toolbar, containing a redacted comment.

**Step 13** – Using the link above, rate each job responsibility. There is a comment field for each responsibility; this is optional but helpful with regards to the future performance discussion that will occur between supervisor and employee.

**Step 14** - Click “Next.”

**Step 15** – the “Goals” section is next. Update existing goals, including the Goal, Description, Due Date, and Status. The comment section is optional, but helpful with regards to ensuring supervisor and employee are on the same page.

#### Review Goals

- Review status of each goal.
- If comments were entered for a goal in a previous evaluation, the comments have carried over to this evaluation.
- Add/update comments for each goal as needed.

The screenshot displays a 'Review Goals' form. It includes a 'Goal' field with a dropdown menu set to 'Normal' and a rich text editor containing the text: 'Become proficient with completing [redacted] including adoption of new business processes as necessary'. Below this is a 'Description' field, also with a dropdown set to 'Normal' and a rich text editor that is mostly redacted. The 'Due Date' is set to '06/30/2026'. The 'Status' is set to 'In Progress'. There are separate sections for 'Manager' and 'Employee', each with a dropdown menu set to 'Normal' and a rich text editor for comments. The employee's comment field is redacted.

**Step 16** - Click, “Next” once all goals have been reviewed and updated.

**Step 17** - Optional - add attachments. Attachments to consider might be PDFs of training courses completed, conferences attended, performance feedback, etc.

**Step 18** - choose an overall rating and add a comment, if desired.

The screenshot shows the 'Midpoint Overall Rating' section. It has a heading 'Midpoint Overall Rating' and a bold instruction: 'The Overall Rating should be reflective of performance in areas of responsibility and progress on goals.' Below this is a list of guidelines:

- Employee self-rating of individual items should be considered when selecting an overall rating.
- Overall Rating should be in alignment with individual item ratings.
- Human Resources will be notified of an overall rating of Failing to Meet Expectations.
- Performance improvement strategies should be discussed with your Human Resources team.

At the bottom, there is a 'Manager' section with a 'Rating' dropdown menu set to 'Meeting Expectations' and a 'Rating Description' field containing the text: 'Performance consistently meets the communicated expectations.'

**Step 19** - Click “Next.” This will take you to the overall evaluation and rating for non-primary job. For most employees at the School of Pharmacy, this is not required. You may click “Next” again.

**Step 20** - when ready, click the blue “Submit.” Please note that once you click this submit button, **NO CHANGES CAN BE MADE**. If you wish to make changes based on discussion with

the employee, you should click “Save for Later” and share the evaluation with the employee by meeting with them.

**The process continues with the supervisor:**

*Step 21* – the supervisor now receives a task to “Schedule Review Discussion.” Once the review has been scheduled, you can click “Submit” on this task.

**Special notes:**

**Warning:** Once you have completed "Schedule Review Discussion" it will be sent to the employee. Do not hit submit if you do not want the evaluation to be seen by the employee before the review conversation.

Here is what the “Schedule Review Discussion” task looks like:

**Complete To Do** [Schedule Review Discussion](#)

For [REDACTED]

Overall Process [Midpoint Evaluation Staff - 2020](#) [REDACTED]

Overall Status In Progress

Instructions **Schedule a time to discuss this review with the employee**

- Meet with the employee and discuss this performance evaluatic
- After your discussion with the employee, click **Submit** on this ta
- When you click Submit, the performance review will be sent to tl

**You must click Submit on this To Do in order for the pro  
My Tasks.**



*Step 22* – when ready, click “Submit.” The task now goes to the employee to acknowledge.

**The process continues with the employee:**

*Step 23* – the employee receives a task that says “Provide Employee Review Comments.” Click “Get Started.”

## Provide Employee Review Comments

Manager Evaluation: Midpoint Evaluation Staff - 2026

Evaluated By

Review Period 12/31/2025 - 12/31/2025

**Review all content of this evaluation.**

**Acknowledgement is required to complete the evaluation.**

- Acknowledgement indicates receipt of information.
- Acknowledgement does not infer agreement with the overall rating.
- Questions regarding performance evaluations should be discussed with your Human Resources team.

Get Started

*Step 24* - employee reviews the evaluation Summary. Once the review is complete, click, "Next" at the bottom.

*Step 25* - Acknowledgement.

### Acknowledgement

#### Employee

Status \* Search

I acknowledge I have received this performance evaluation information.

Comment

... a value.

⋮ 🔗 ✉

*Step 26* - Click "Submit."

**The process concludes with the supervisor:**

*Step 27* - the manager must now review this task that comes in to Acknowledge/complete the process. Click "Get Started" as seen below.

## Provide Manager Review Comments

Manager Evaluation: Midpoint Evaluation Staff - 2026

Review Period 12/31/2025 - 12/31/2025

**Review all content of this evaluation.**

**Acknowledgement is required to complete the evaluation.**

- The acknowledgement statement indicates you have shared the information in this evaluation with the employee.

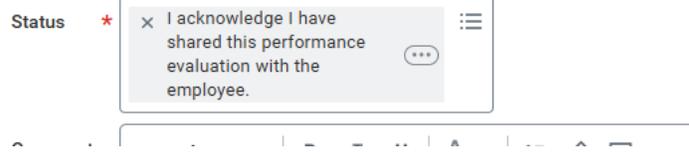
Get Started

*Step 28* - complete a review of the evaluation summary, click next, and "Submit" the acknowledgement.

## Acknowledgement

### Manager

Status \* × I acknowledge I have shared this performance evaluation with the employee. ⋮



END OF TASK.