

# Stage 2: Mid-Year Progress Review

Initial Goal  
Planning

Mid-Year  
Progress  
Review

Year-End  
Assessment

# Stage 2: Mid-Year Progress Review

The screenshot displays a web interface for a performance review. At the top, there is a navigation bar with 'About me', 'My team', and 'My community' dropdowns, a 'Journal entry' button, and a user profile for 'Emma'. A yellow warning banner states: 'WARNING: You are controlling an employee. Close your controlling session'. The main heading is 'Emma Employee - Performance Review 2024 - 2025'. Below this is a breadcrumb trail: 'Start' (circled in red), 'Goal Planning', 'Mid Year', 'Year End Assessment', and 'Next steps'. To the right, it says 'Last saved: Oct 21, 2024, 2:47pm' and 'Actions'. The main content area shows 'You are in the Mid Year Progress Review - Employee Stage' (the text 'Mid Year Progress Review - Employee' is boxed in red). Below this is the text: 'Employee's Responsibilities: In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.' A tip follows: 'Tip: Schedule a check-in with your manager to review your progress and, if needed, recalibrate your goals to ensure you stay aligned and on track.' At the bottom right, there is a 'Next' button with a right-pointing arrow.

The **Mid-Year Progress Review** begins with the employee, who will reflect on their progress toward the SMARTER goals. Afterward, the employee will pass it on to their manager for their feedback.

# Goal Planning tab as the Employee

## Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

### Goal Planning

✓ Saved Last saved: Oct 24, 2024, 2:00pm Actions ▾

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

#### ▼ Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request



Target date

**This button will save your comments and share them with your manager**

Save & Share Save as Private Cancel

**This button will save your comments as a draft**

There are no comments for this item.

During the **Mid Year Progress Review**, please review each listed goal and add your comments towards your progress.

# Mid Year tab as the Employee

- In the **Mid Year** tab, please reflect on your progress towards the SMARTER goals and record your thoughts here. This will be viewable by your manager
- Afterwards, you'll pass the review to your manager.
- They will also reflect on your progress.
- You will be able to review their feedback after that.

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > **Mid Year** > Year End Assessment > Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 2:47pm Actions

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

**Manager's Responsibilities:** Allow your employee time to reflect on their progress and submit their feedback. Once they have completed this step, you will receive the review for your input. You can then assess their progress, provide feedback on their strengths, and identify areas for improvement to help enhance their performance.

The mid-year review is an opportunity to assess progress toward the goals set at the beginning of the year. Reflect on key achievements, actions taken, and any obstacles encountered. This stage is also a chance to engage in a constructive dialogue to receive feedback, recalibrate goals if necessary, and ensure alignment with evolving team and organizational priorities.

Is your employee on track to achieve their performance goals?

**Respond to question by adding a comment**

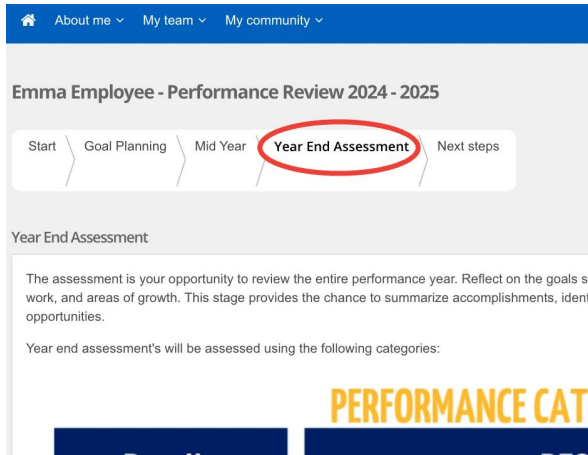
Add comment

Hannah Masbad  
★★  
Not rated

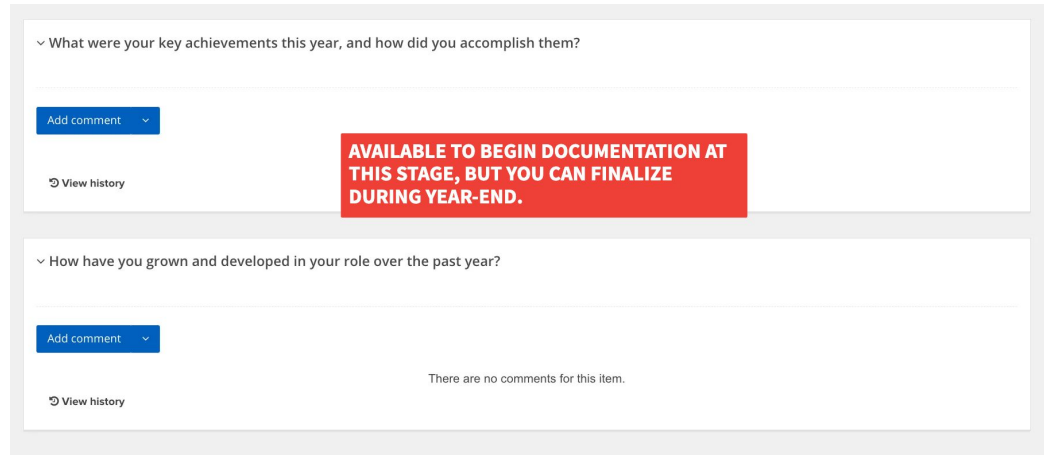
**Manager's response to question. Employee to review response at later stage.**

There are no comments for this item.

# Year End Assessment tab as the Employee



The screenshot shows a navigation bar with 'About me', 'My team', and 'My community'. Below it, the title 'Emma Employee - Performance Review 2024 - 2025' is displayed. A progress bar contains five stages: 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment' (circled in red), and 'Next steps'. Underneath, the 'Year End Assessment' section contains introductory text and a 'PERFORMANCE CAT' logo.



This screenshot shows two assessment questions. The first question is 'What were your key achievements this year, and how did you accomplish them?'. Below it is an 'Add comment' button and a 'View history' link. A red banner overlay reads: 'AVAILABLE TO BEGIN DOCUMENTATION AT THIS STAGE, BUT YOU CAN FINALIZE DURING YEAR-END.' The second question is 'How have you grown and developed in your role over the past year?'. It also has an 'Add comment' button and a 'View history' link. Below the second question, it states 'There are no comments for this item.'

During the Mid-Year Progress Review stage, you may begin documentation to these questions. However, you will have the opportunity to address and finalize your responses during the final stage of the performance process.

# Next steps tab as the Employee

Start > Goal Planning > Mid Year > Year End Assessment > **Next steps**

Supervisor Overall Rating  
Not rated

Item summary ⌵  
Item summary Hannah Masbad

▼ Goal Planning

1. Deliver Systems Enhancements, Maintenance and Projects
2. Improve Change Management

▶ Mid Year

▶ Year End Assessment ★★★★★

Your next step: **Mid-Year Progress Review - Manager**

ⓘ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Press this button to pass the review to your manager** → **Go to next step**

Now the employee will pass the **Mid-Year Progress Review** to their manager.

Please push the “Go to next step” button

# Goal Planning tab as the Manager

## Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

### Goal Planning

✓ Saved Last saved: Oct 24, 2024, 2:00pm

Actions ▾

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

#### ▼ Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request



Target date

**This button will save your comments and share them with your manager**

Save & Share Save as Private Cancel

**This button will save your comments as a draft**

There are no comments for this item.

During the **Mid Year Progress Review**, please review each listed goal and new comments the employee may have added. You can add your comments on your employee's progress.

# Mid Year tab as the Manager

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > **Mid Year** > Year End Assessment > Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 2:51pm Actions

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

**Manager's Responsibilities:** Allow your employee time to reflect on their progress and submit their feedback. Once they have completed this step, you will receive the review for your input. You can then assess their progress, provide feedback on their strengths, and identify areas for improvement to help enhance their performance.

The mid-year review is an opportunity to assess progress toward the goals set at the beginning of the year. Reflect on key achievements, actions taken, and any obstacles encountered. This stage is also a chance to engage in a constructive dialogue to receive feedback, recalibrate goals if necessary, and ensure alignment with evolving team and organizational priorities.

Is your employee on track to achieve their performance goals?

Respond to this question by clicking "Yes" or "No"

Hannah Masbad  
★ ★  
Yes

Manager writing a comment

Provide feedback for your employee here

Save & Share Save as Private Cancel

Comment Emma Employee  
Emma writing if she's on track or not.

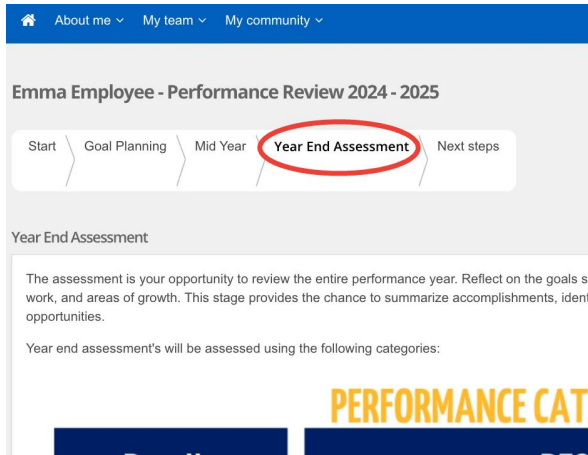
You can read your employee's self reflection here

Today at 2:50 PM

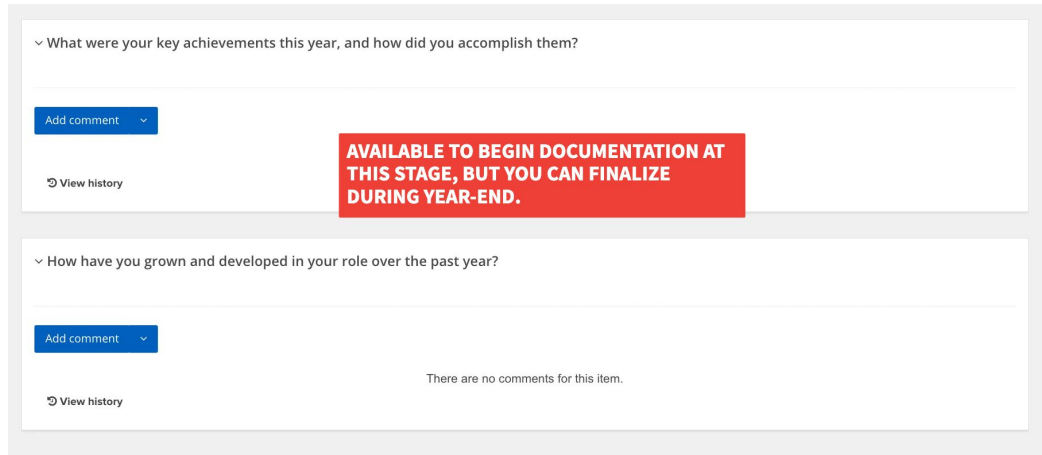
- Please review your employee's Mid Year reflection.
- Then you can write your feedback.
- Lastly, you will use the stars to respond "Yes" or "No" to the question



# Year End Assessment tab as the Manager



The screenshot shows a navigation bar with 'About me', 'My team', and 'My community'. Below it, the title 'Emma Employee - Performance Review 2024 - 2025' is displayed. A progress bar contains five stages: 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment' (circled in red), and 'Next steps'. Underneath, the 'Year End Assessment' section is expanded, showing introductory text and a 'PERFORMANCE CAT' logo.



This screenshot shows two assessment questions. The first question is 'What were your key achievements this year, and how did you accomplish them?'. Below it is an 'Add comment' button and a 'View history' link. A red banner overlay reads: 'AVAILABLE TO BEGIN DOCUMENTATION AT THIS STAGE, BUT YOU CAN FINALIZE DURING YEAR-END.' The second question is 'How have you grown and developed in your role over the past year?'. It also has an 'Add comment' button and a 'View history' link. Below the second question, it states 'There are no comments for this item.'

During the Mid-Year Progress Review stage, you may begin documentation to these questions. However, you will have the opportunity to address and finalize your responses during the final stage of the performance process.

# Next steps tab as the Manager

- A score will now populate in the manager Overall Rating section. Please disregard as it is intended to compile all ratings accumulated over the course of the entire process
- Click “Go to the next step” to progress the ACE review along

Start > Goal Planning > Mid Year > Year End Assessment > Next steps

**Please disregard this rating during the Mid-Year Progress Review, as it is intended to compile all ratings accumulated over the course of the entire process**

Supervisor Overall Rating 2 / 5

Met some but not all expectations: Sometimes meets expectations, or Partially completed the objective - Inconsistent Performance. Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected;

Item summary Hannah Masbad

Item summary

▼ Goal Planning

1. Add your goal(s) here

► Mid Year

► Year End Assessment ★★★★★

Your next step: Year-End Assessment - Employee

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Click to progress to next stage** Go to next step