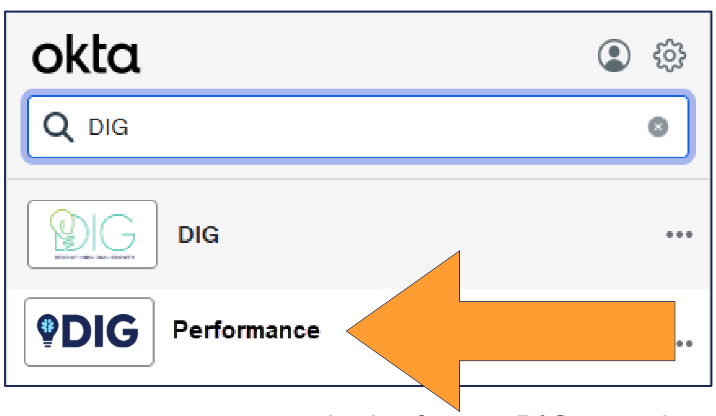
# Mid-Year Review Process

## Contents



### Access DIG – Performance

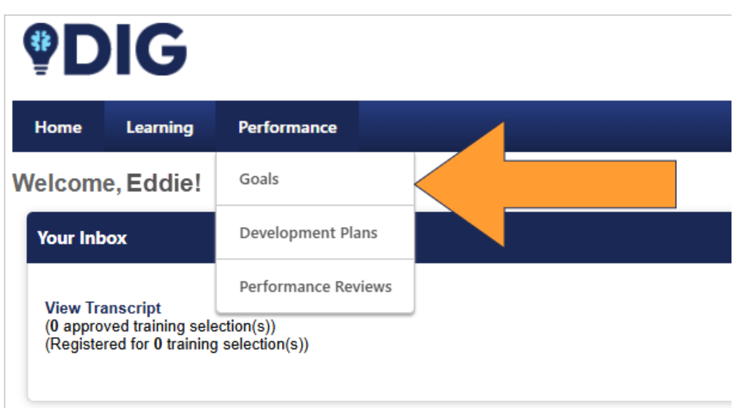
1. Log into the new DIG experience via Okta



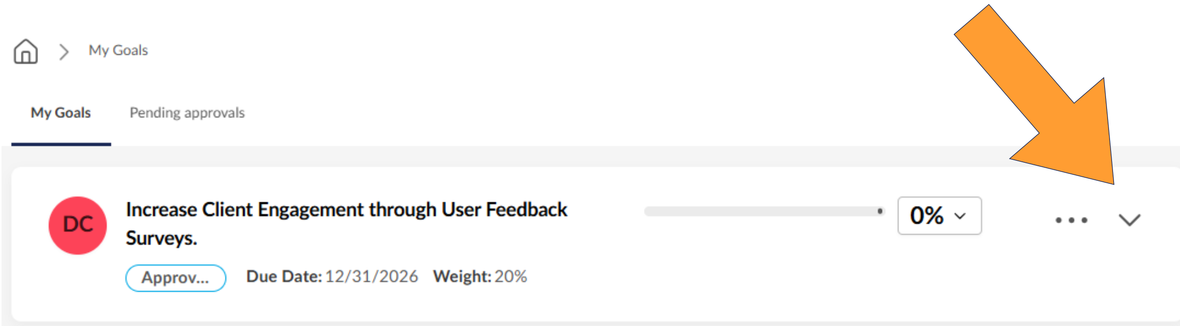

**Note:** Performance management in the former DIG experience has been disabled. **All mid-year tasks must be completed in DIG – Performance.**

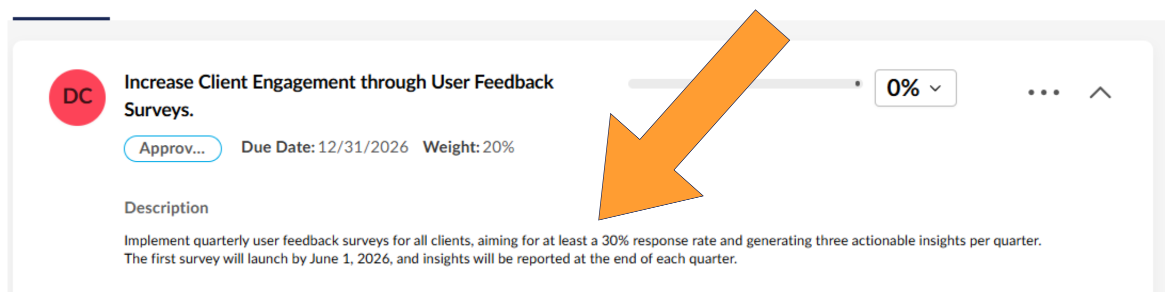
## Update Goal Status

1. Hover the cursor over **Performance** in the header menu.
2. Click **Goals**

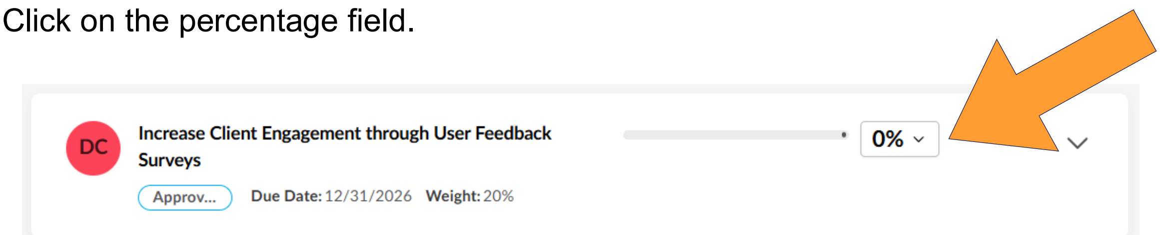


3. Expand each Goal by clicking the down arrow and validate that the title and description were correctly imported.

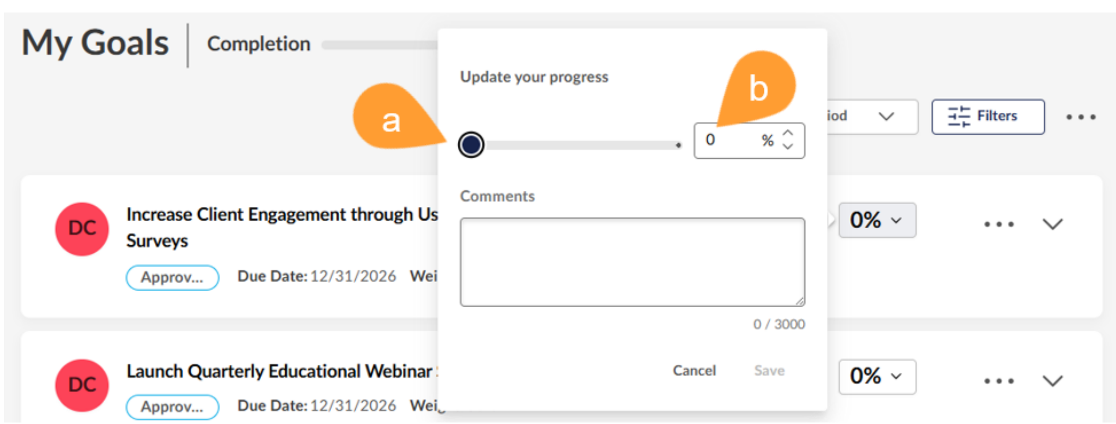


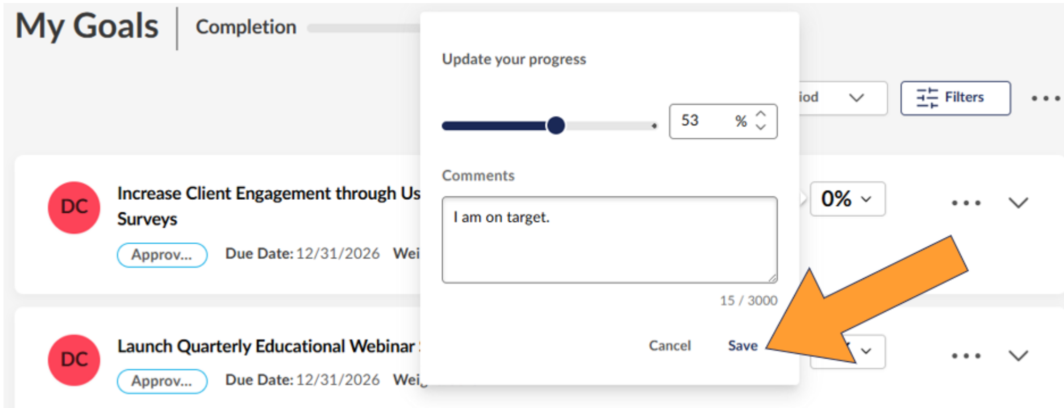

4. Click on the percentage field.



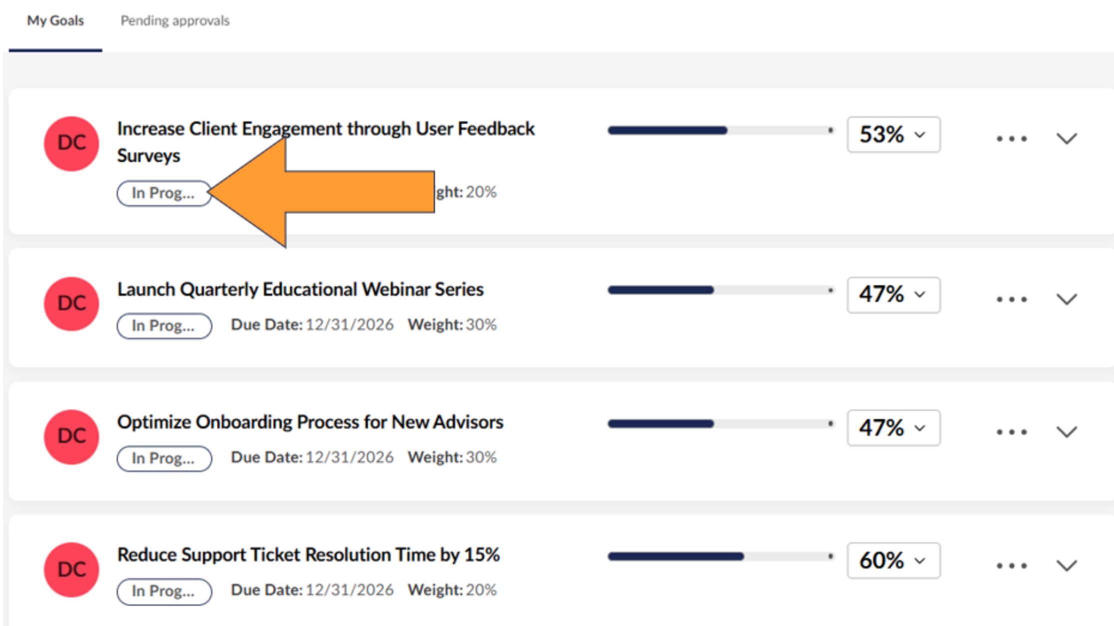

5. You can update progress in two ways:
    a. Click and drag the slider to the desired percentage, or
    b. Type the exact percentage directly into the field



6. Add a comment to provide context for your progress and click **Save**




7. Repeat steps 3 – 6 for all remaining goals.




Goal statuses will update from Approved to In Progress automatically based on the progress entered.

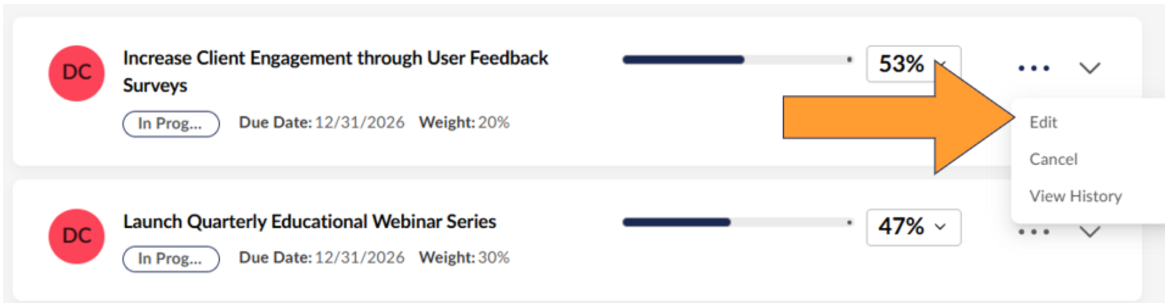
**Goal Status Definitions:**

- Approved – Progress has not yet started (less than 5%)
- In Progress – Active work is underway (greater than 5%)
- Behind Schedule – Progress is less than 50% when 75% of the timeline has passed
- Completed – Goal has reached 100% or more

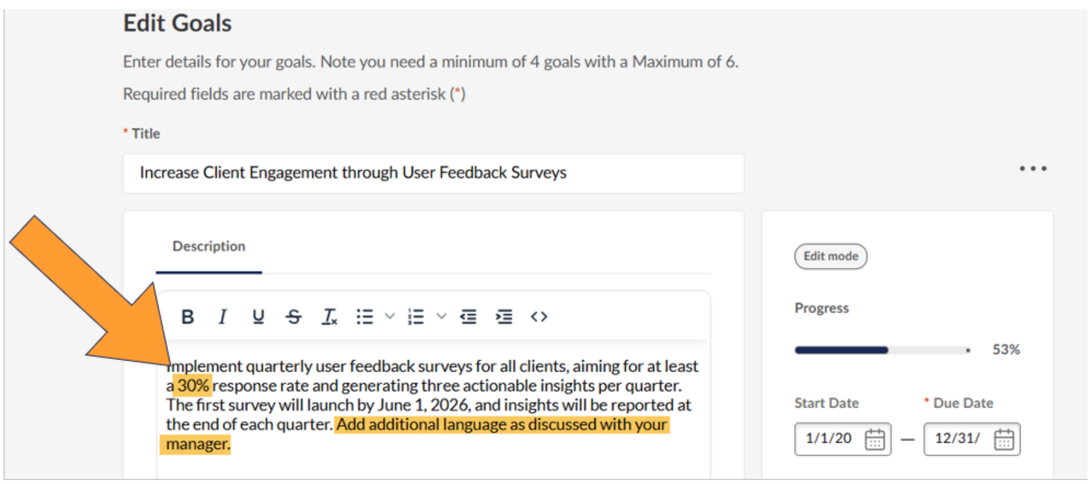
# Modifying a Goal

If your priorities or circumstances have changed, you may need to update an existing goal. Follow these steps to modify an existing goal.

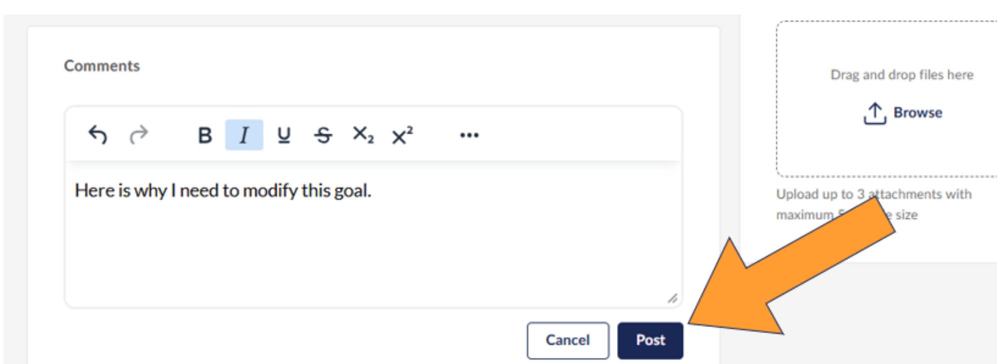
1. Click the three dots (···) menu next to the goal.
2. Click Edit



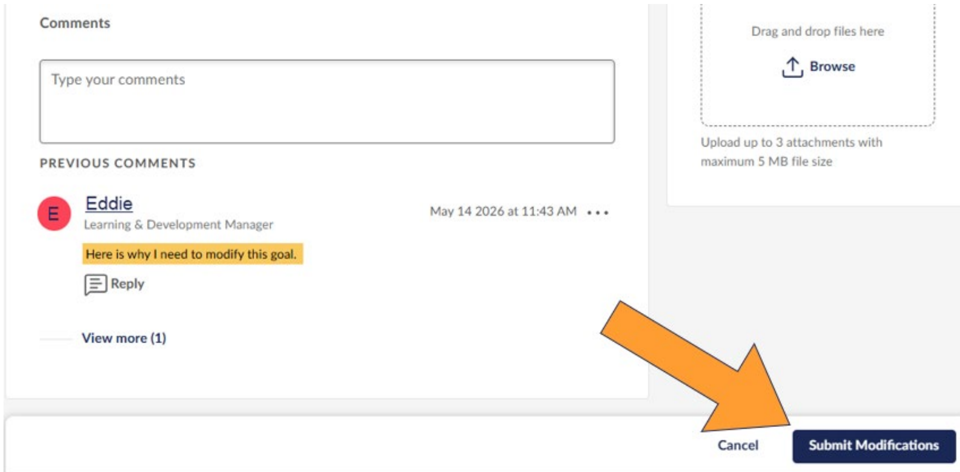

3. Modify the title and description, as desired. In the following example the response rate was changed from 40% to 30% and additional language was added.




4. Enter a comment explaining why the goal was modified and click **Post**.

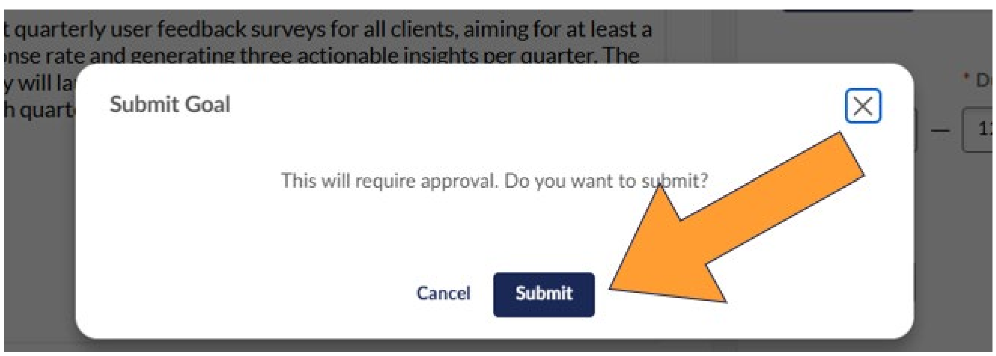


5. The comment i s added to the goal. Click the <Submit Modifications> button.

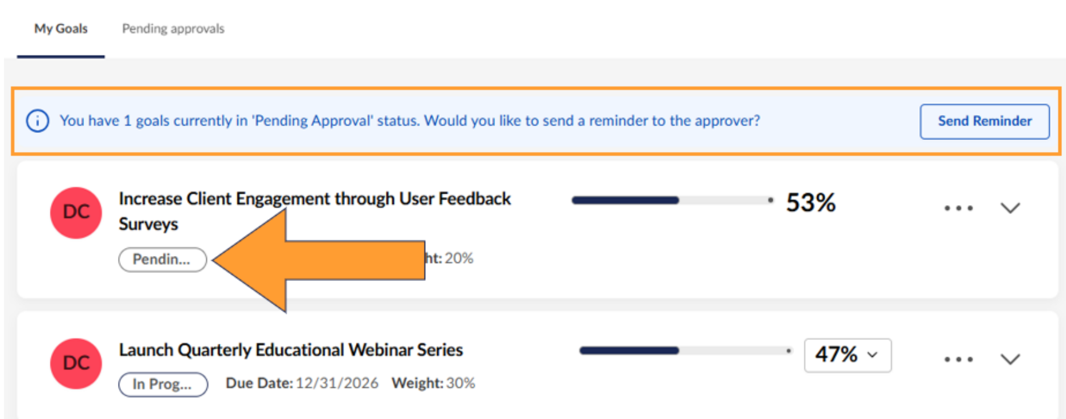



***Note**: Total goal weight across all goals must equal 100%. Adjusting one goal may require updating others.*

6. A confirmation window will appear indicating that manager approval is required. Click **Submit** to finalize.

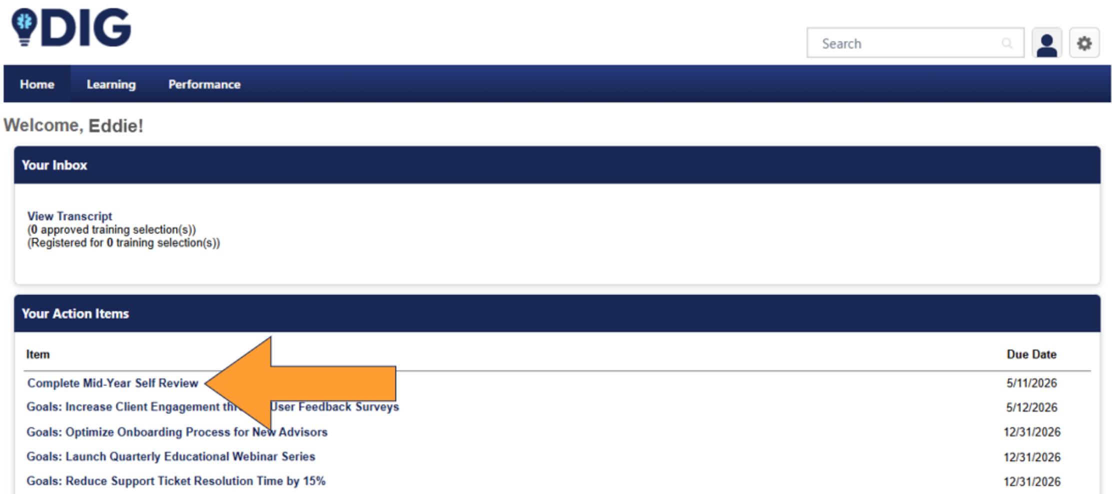



7. The goal status will change to Pending until your manager reviews and approves the changes.

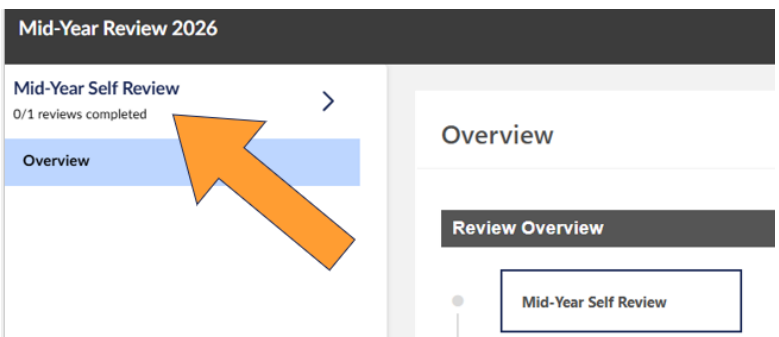


## Complete Your Mid-Year Review

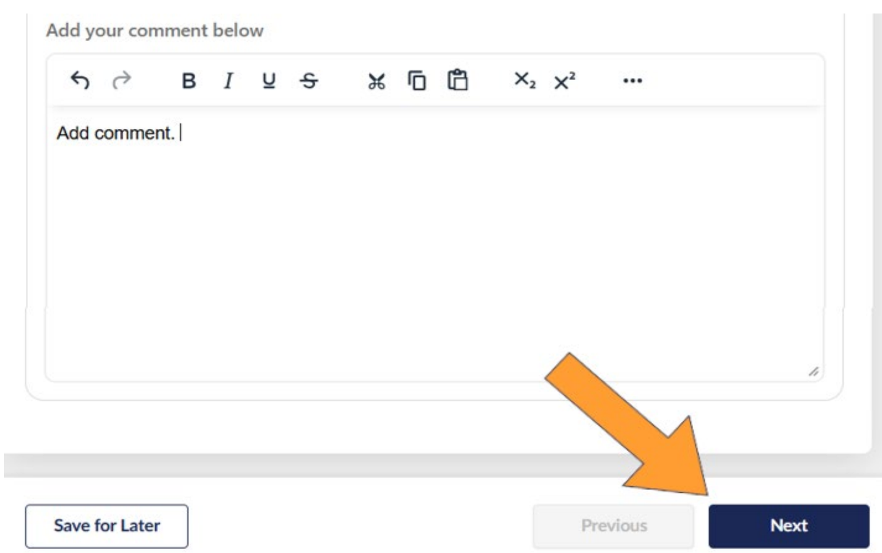
1. From Your Action Items, click Complete Mid-Year Self Review.



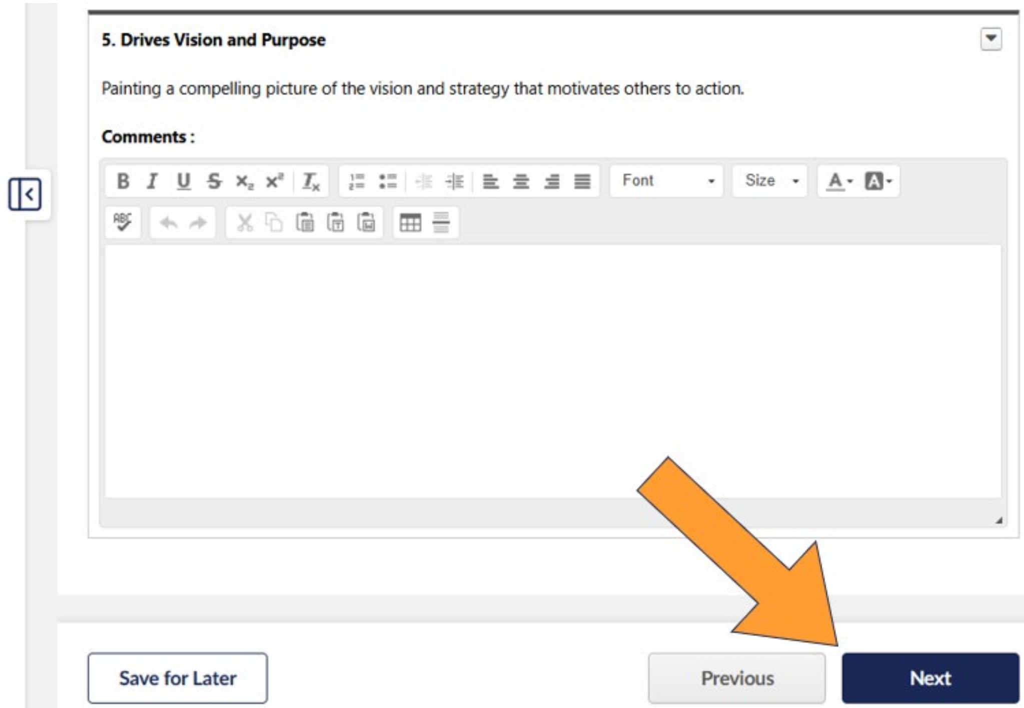

2. From the left-hand menu, click **Mid-Year Self Review**.



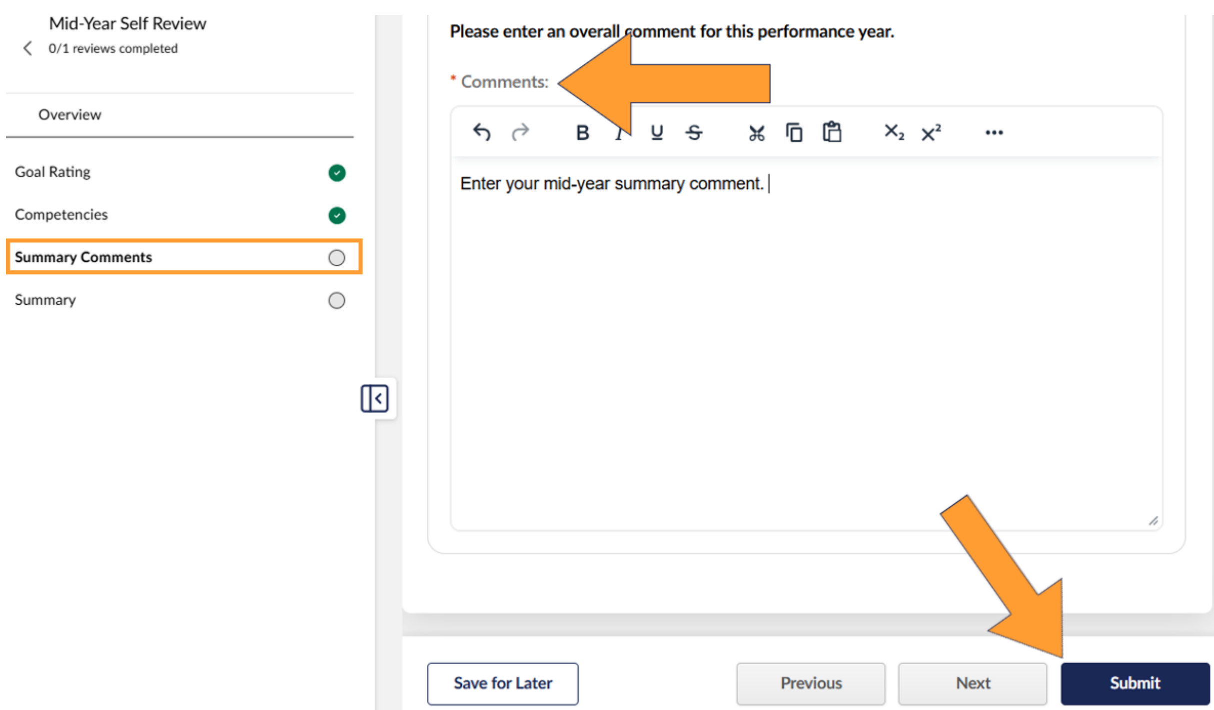

3. The task actions are displayed starting with goal rating. Enter a comment for all goals and click Next.



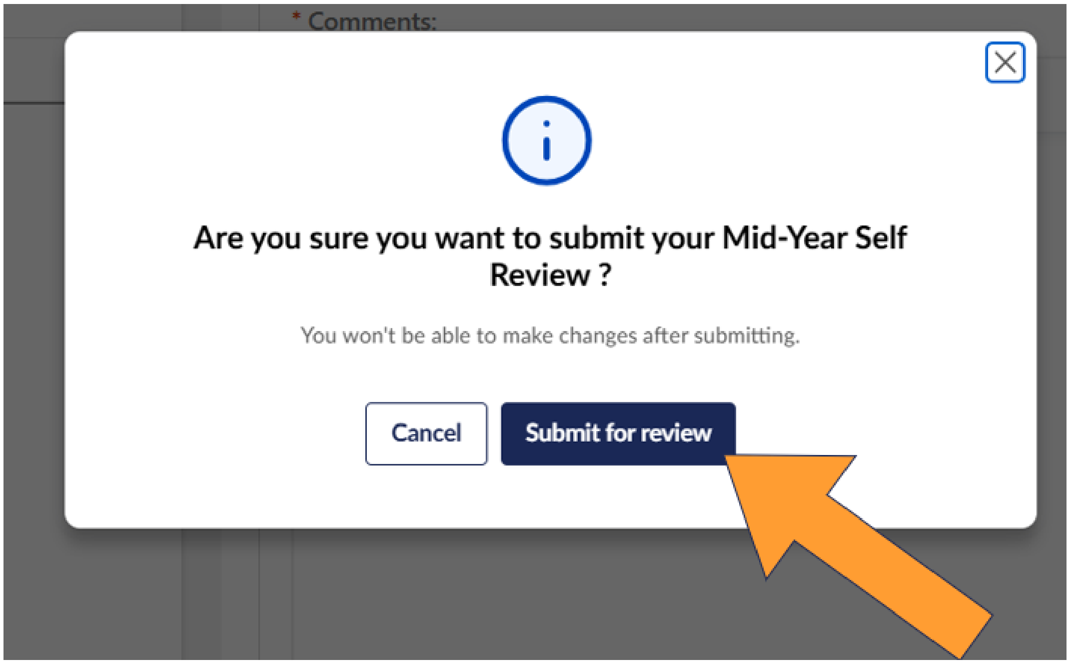
4. The Competency page is displayed. Scroll down and review each competency, add comments as desired, and then click Next.



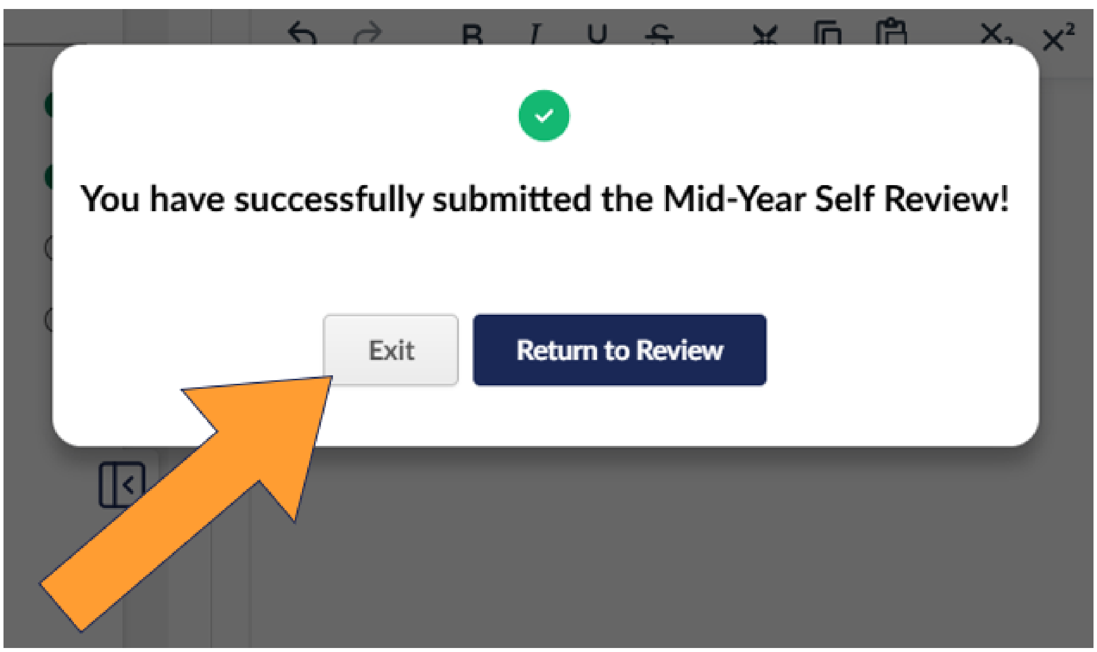

5. The Summary Comment page is displayed. Enter a summary comment and click Submit.



6. A pop-up window will be displayed. Click the **Submit for review** button.

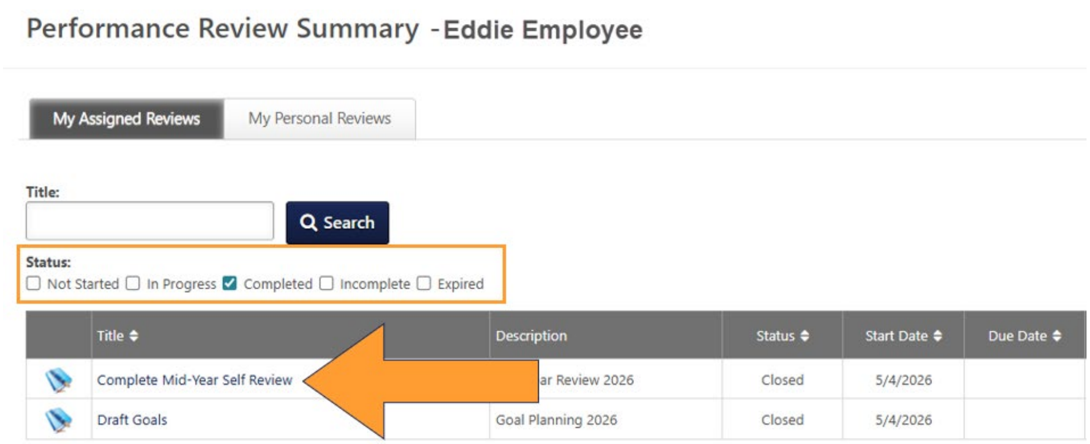



7. A pop-up window will be displayed. Click the Exit button.

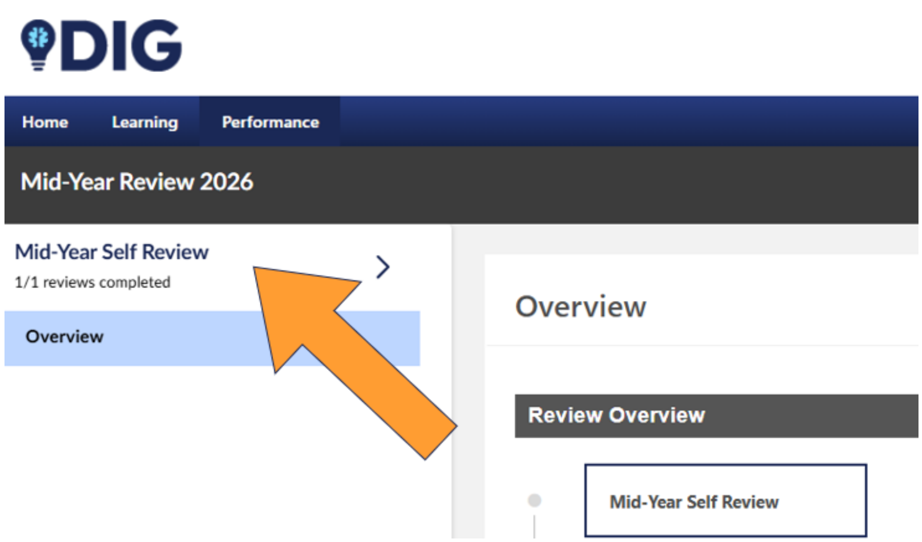


8. After submission, you can return to your review at any time. You can review your responses as well as manager feedback once it is available. Hover over Performance and click Performance Reviews.


9. The Performance Review Summary page is displayed. Click the “Completed” check box and deselect the others as needed and the Complete Mid-Year Self Review task will be displayed.




10. Click the Mid-Year Self Review from the left-hand menu.



11. Click through the Goal Rating, Competencies and Summary Comments to review your and your manager's comments.