

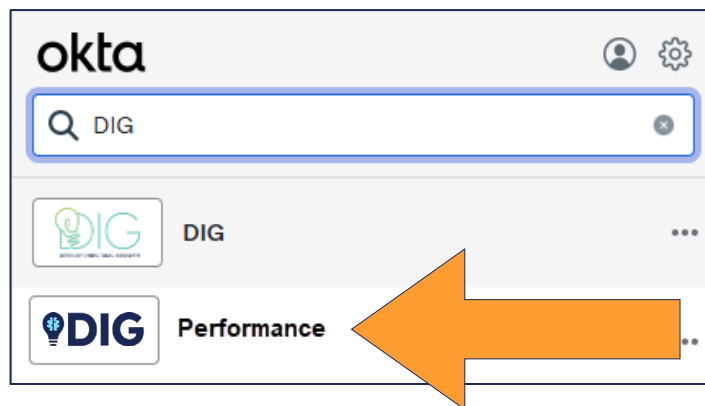
# Mid-Year Review Process

## Contents

|                                    |   |
|------------------------------------|---|
| Access DIG – Performance .....     | 1 |
| Update Goal Status .....           | 1 |
| Modifying a Goal.....              | 4 |
| Complete Your Mid-Year Review..... | 6 |

## Access DIG – Performance

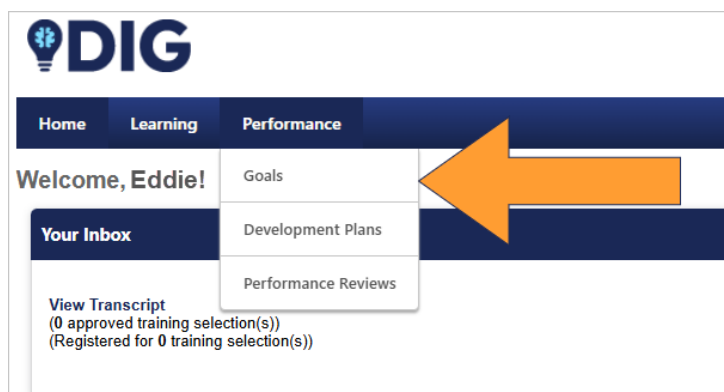
1. Log into the new DIG experience via [Okta](#)



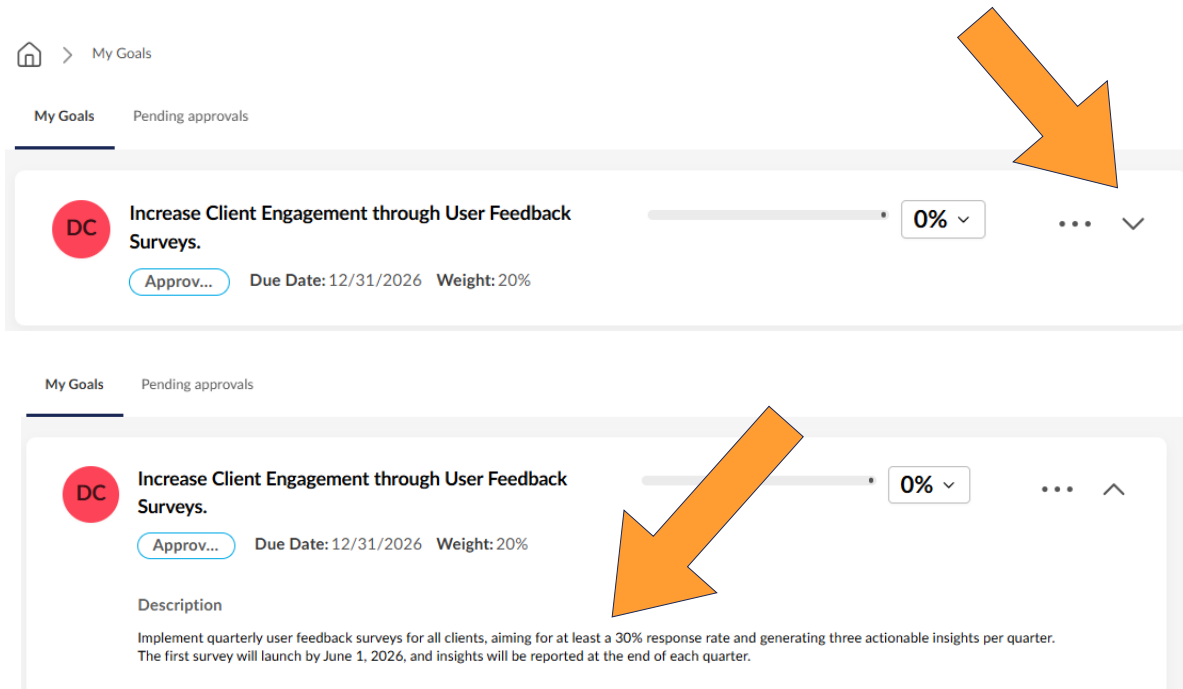
**Note:** Performance management in the former DIG experience has been disabled. **All mid-year tasks must be completed in DIG – Performance.**

## Update Goal Status

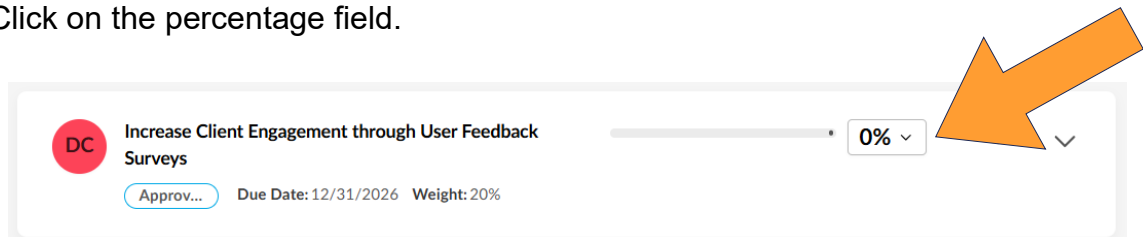
1. Hover the cursor over **Performance** in the header menu.
2. Click **Goals**



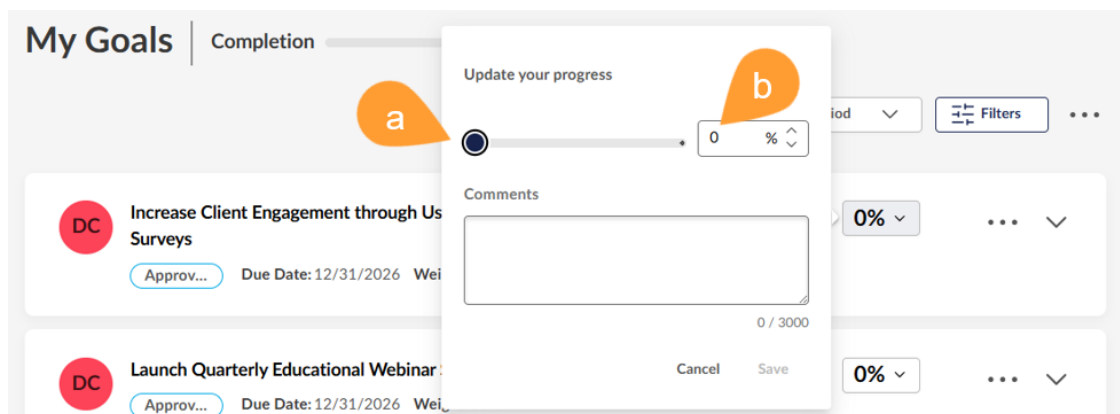
- Expand each Goal by clicking the down arrow and validate that the title and description were correctly imported.



- Click on the percentage field.



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



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

The screenshot shows a modal titled "Update your progress" overlaid on a list of goals. The modal contains a progress slider set to 53%, a text area with the comment "I am on target.", and "Cancel" and "Save" buttons. An orange arrow points to the "Save" button. In the background, the goal card for "Increase Client Engagement through User Feedback Surveys" is visible, showing a status of "Approved" and a due date of 12/31/2026.

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

The screenshot shows the "My Goals" page with four goals listed. Each goal has a status of "In Progress" and a progress percentage. An orange arrow points to the "In Progress" status of the first goal. The goals are:

| Goal ID | Goal Description                                         | Progress | Status      | Due Date   | Weight |
|---------|----------------------------------------------------------|----------|-------------|------------|--------|
| DC      | Increase Client Engagement through User Feedback Surveys | 53%      | In Progress | 12/31/2026 | 20%    |
| DC      | Launch Quarterly Educational Webinar Series              | 47%      | In Progress | 12/31/2026 | 30%    |
| DC      | Optimize Onboarding Process for New Advisors             | 47%      | In Progress | 12/31/2026 | 30%    |
| DC      | Reduce Support Ticket Resolution Time by 15%             | 60%      | In Progress | 12/31/2026 | 20%    |

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

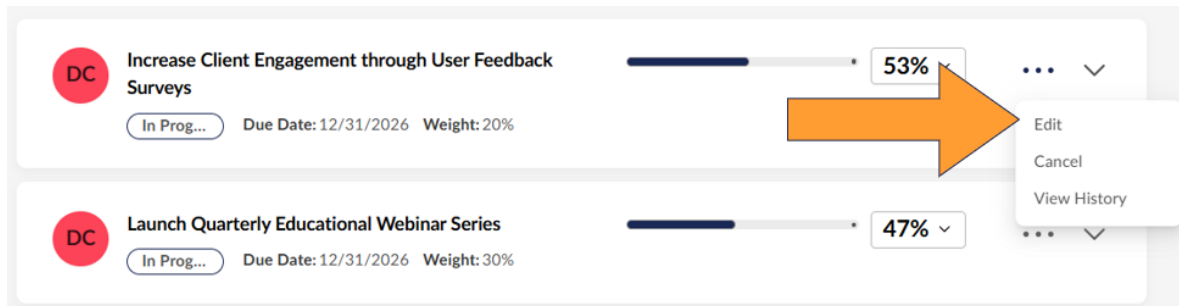
### Goal Status Definitions:

- 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

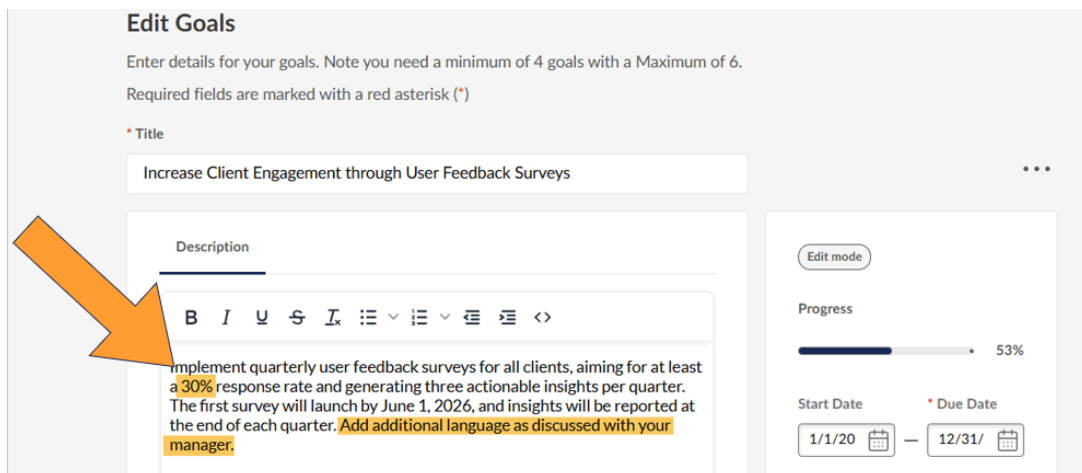
## Modifying a Goal

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

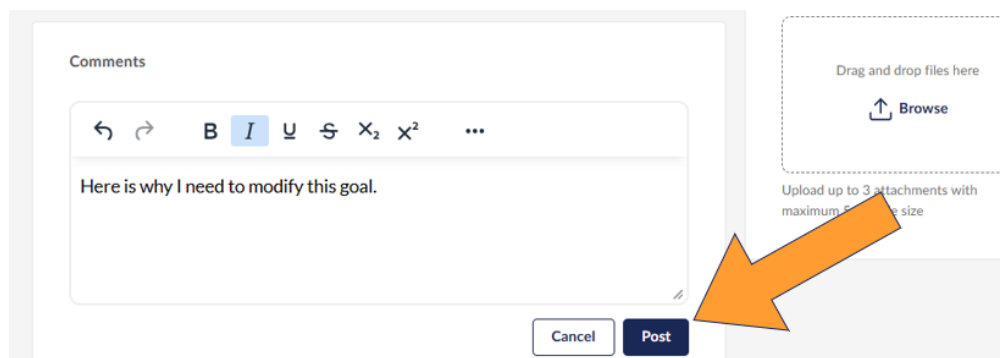
1. Click the three dots (⋮) menu next to the goal.
2. Click Edit



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 is added to the goal. Click the <Submit Modifications> button.

Comments

Type your comments

PREVIOUS COMMENTS

**Eddie**  
Learning & Development Manager  
May 14 2026 at 11:43 AM ...  
Here is why I need to modify this goal.  
Reply  
View more (1)

Drag and drop files here  
Browse  
Upload up to 3 attachments with maximum 5 MB file size

Cancel Submit Modifications

**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.

Submit Goal

This will require approval. Do you want to submit?

Cancel Submit

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

My Goals Pending approvals

You have 1 goals currently in 'Pending Approval' status. Would you like to send a reminder to the approver? Send Reminder

**DC** Increase Client Engagement through User Feedback Surveys  
53%  
Pending... Weight: 20%

**DC** Launch Quarterly Educational Webinar Series  
47%  
In Prog... Due Date: 12/31/2026 Weight: 30%

## Complete Your Mid-Year Review

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

The screenshot shows the DIG dashboard interface. At the top, there's a navigation bar with 'Home', 'Learning', and 'Performance' tabs. Below this, a 'Welcome, Eddie!' message is displayed. The 'Your Inbox' section shows a 'View Transcript' link. The 'Your Action Items' section contains a table with the following items:

| Item                                                            | Due Date   |
|-----------------------------------------------------------------|------------|
| Complete Mid-Year Self Review                                   | 5/11/2026  |
| Goals: Increase Client Engagement through User Feedback Surveys | 5/12/2026  |
| Goals: Optimize Onboarding Process for New Advisors             | 12/31/2026 |
| Goals: Launch Quarterly Educational Webinar Series              | 12/31/2026 |
| Goals: Reduce Support Ticket Resolution Time by 15%             | 12/31/2026 |

An orange arrow points to the 'Complete Mid-Year Self Review' item in the table.

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

The screenshot shows the 'Mid-Year Review 2026' page. On the left, there's a sidebar menu with 'Mid-Year Self Review' (0/1 reviews completed) and 'Overview'. An orange arrow points to the 'Mid-Year Self Review' link. The main content area shows an 'Overview' section with a 'Review Overview' card and a 'Mid-Year Self Review' button.

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

The screenshot shows the comment input area. It includes a text box with the placeholder 'Add your comment below' and a rich text editor toolbar. Below the text box, there's a 'Save for Later' button, a 'Previous' button, and a 'Next' button. An orange arrow points to the 'Next' button.

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

**5. Drives Vision and Purpose**

Painting a compelling picture of the vision and strategy that motivates others to action.

**Comments :**

Save for Later Previous Next

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

Mid-Year Self Review  
0/1 reviews completed

Overview

- Goal Rating ☒
- Competencies ☒
- Summary Comments** ☐
- Summary ☐

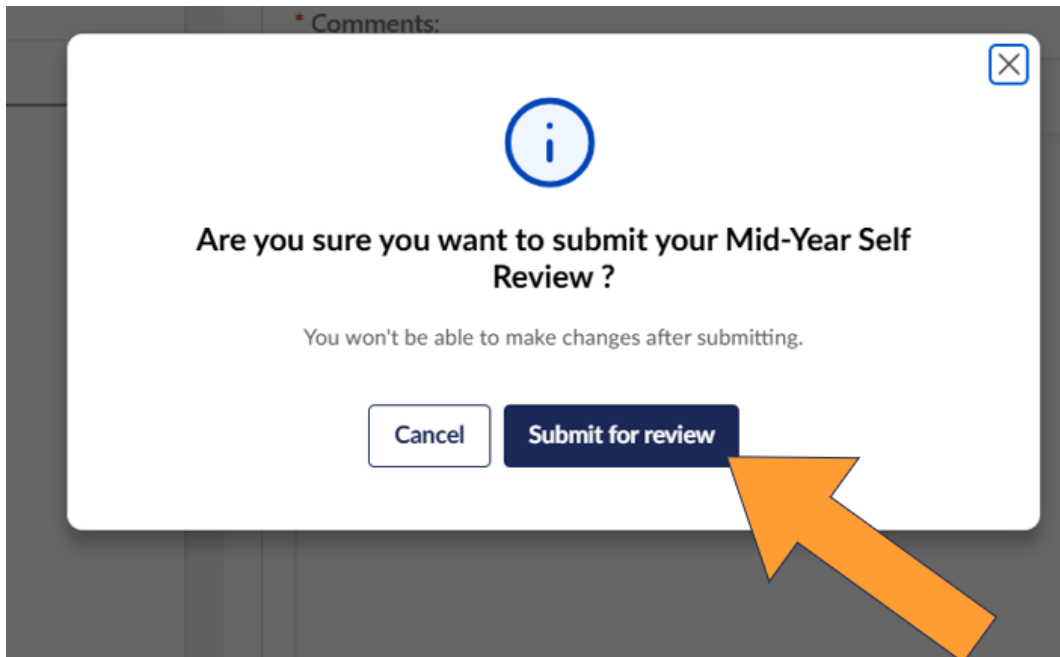
Please enter an overall comment for this performance year.

\* Comments:

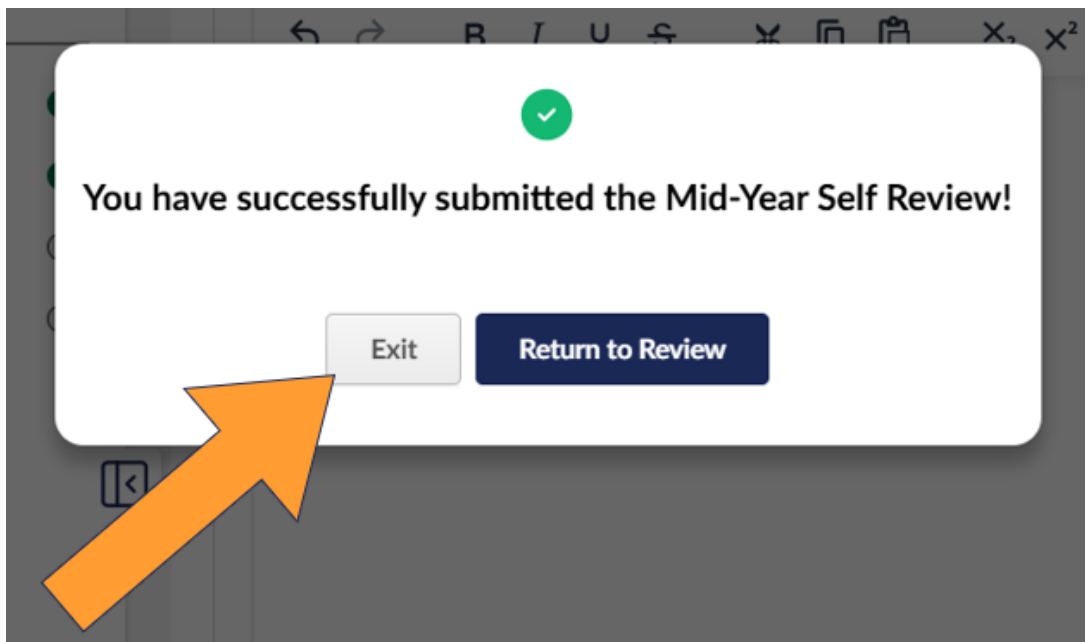
Enter your mid-year summary comment. |

Save for Later Previous Next 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.

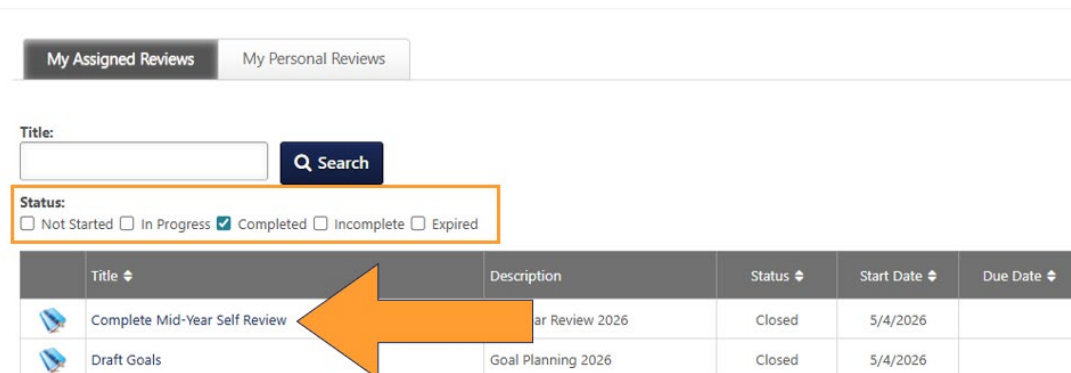


8. After submission, you can return to your review at any time. You can review your responses as well as manager feedback once it is available. Hover over Performance and click Performance Reviews.

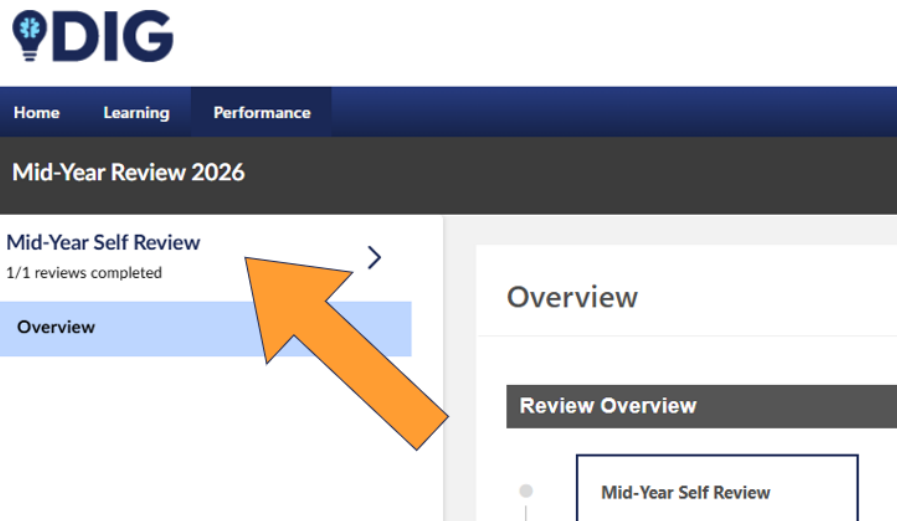


9. The Performance Review Summary page is displayed. Click the “Completed” check box and deselect the others as needed and the Complete Mid-Year Self Review task will be displayed.

#### Performance Review Summary - Eddie Employee



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.

The screenshot displays the DIG Mid-Year Review 2026 interface. The top navigation bar includes 'Home', 'Learning', and 'Performance'. A search bar and user profile icon are on the right. The main header is 'Mid-Year Review 2026'. The left sidebar shows the review progress: 'Mid-Year Self Review' (1/1 reviews completed, due 5/11/2026), 'Overview', 'Goal Rating' (checked), 'Competencies' (checked), 'Summary Comments' (checked), and 'Summary' (checked). The main content area is titled 'Summary Comments' and prompts the user to 'Please enter an overall comment for this performance year.' Below this, the 'Comments' section shows a review by 'Joe Manager' (JM) on May 18, 2026, at 1:03 PM. The review is for 'Mid-Year Review 2026' and the relation is 'Manager'. A large orange arrow points to the 'Manager' label. The review text states: 'You have made good progress toward launching quarterly user feedback surveys by establishing a clear strategy, aligning stakeholders, and developing survey content. This preparation positions the first survey, launching by June 1, for effective execution and meaningful insight generation in the second half of the year.'