ePerformance – Quick Reference
Performance Management: Mid-Year Review

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Introduction to Performance Management
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Performance Management Process
Performance management is an ongoing process that defines performance expectations, monitors ongoing performance, communicates results and rewards accomplishments. There are four steps in this process:

4 Phases of Performance Management

For Support
1. Visit the Growth and Development sections on McKNet at http://mcknet.mckesson.com
2. Contact the Employee Services Center at 1-866-772-6601. Say "HR", then say "Navigational Assistance."
3. Contact your local HR Representative.

Logging onto ePerformance
1. Access McKNet at http://mcknet.mckesson.com
2. Sign on using your User ID (which is your "e" id) and password, and click the **Sign In** button.
3. **Employees**: To access your performance document:
   - Click on the **My Life and Career** tab
   - Click the Access Your Performance Document link located in the Growth and Development section

   Managers: To access your direct reports' performance documents:
   - Click the **My Team** tab, and open the Growth and Development page
   - Click the Access Performance Documents link.

Phases for the ePerformance Online Document
This table represents the phases a **typical online performance document** should follow throughout the fiscal year.

Phase	Employee Tasks	Manager Tasks
Planning	Add/Edit/Update the performance document.	Add/Edit/Update the performance document.
		Click **Planning Complete** - starts 'Tracking' phase.
Tracking		Add/ Edit/Update the performance document if needed
	Add comments and ratings.	Add comments and ratings.
	At Mid-Year, enter Mid-Year comments.	At Mid-Year, enter Mid-Year comments, conduct Mid-Year Review with employee and click **Mid-Year Review Conducted**.
	At Year-End, complete self-assessment.	At Year-End, enter final ratings and comments. Conduct year-end review with employee. Click **Year-End Review Conducted** – starts 'Review Conducted' phase.
Review Conducted	Review document, add Year-End comments and click **Acknowledge** – starts 'Acknowledged' phase	None.
Acknowledged	None.	Enter comments in the Manager Year-End Comments section only if needed. Document goes automatically into 'Complete' phase.
Complete	None.	None.

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Managing Progress/Mid-Year Reviews

Mid-Year Reviews are used to discuss changes, additions, and deletions to your performance document. It is also a time to discuss if employees are on track for meeting performance components, individual development, and career goals.

The most important outcome for the mid-year review is a rich, fact-filled discussion between the manager and employee about what has been achieved so far, how it has been achieved, and what needs to improve for the remainder of the year.

It is not necessary to rate or provide comments on each performance component for the mid-year. Performance components and ICARE Shared Principles are required to be rated only during the Year-End Review process.

NOTE: At this point in time, the performance document must be in the 'Tracking' phase in order to have the ability to enter comments into the system. If a document is still in the 'Planning' phase, the manager needs to click the **Planning Complete** button to start the 'Tracking' phase.

Some Business Units require Mid-Year Reviews, while others strongly recommend them. Please check with your local HR representative if you have questions.

Employee Tasks

Once you've accessed your performance document:
1. Review all the components of your performance document.
2. You may enter comments in two areas:
   - The comments section for each of the components
   and/or
   - The Employee Mid-Year Review section. If comments are entered here, when a manager runs their Mid-Year Review report, the employee section of that report will display with a "yes" for having comments in this section.
3. Click **Save for Later**, and exit the system.
4. Review your manager's Mid-Year Review Comments when available.

Your manager will be able to review your comments in any area throughout the process. To make confidential performance notes, use the Performance Notes functionality.

Manager Tasks

Once you've accessed the employee's performance document:
1. Review all components of the performance documents and any employee comments.
2. You may enter comments in two areas:
   - The comments section for each of the components
   and/or

- The Manager Mid-Year Comments section. If comments are entered here, when you, as the manager, run a Mid-Year Review report, the manager section of the report will display with a "yes" for having comments in this section.
3. Click **Save for Later**, and exit the system
4. Conduct a Mid-Year Review with the employee, covering:
   - Current results achieved;
   - Observed behaviors;
   - Action plans or improvements needed before the year-end review;
   - Modifications to performance components; and
   - Barriers that may be impeding success.
5. Add any additional comments to the document that were discussed during the review. Then click the **Mid-Year Review Conducted** button, and exit the system. Once you've clicked this button, the employee can see the comments entered in the Manager Mid-Year Comments section. These comments will not be editable after the button is clicked, and the date you clicked the button will be stored as the Mid-Year Review date.

Printing Performance Documents

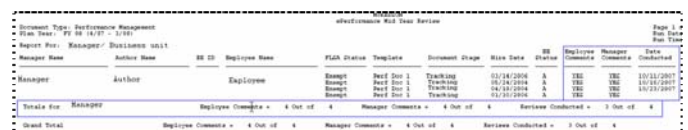You can print the performance document at any point in time. With the document opened:
1. To print what is currently expanded in the document (what you see on the screen), click the Printer icon at the top of the toolbar.
2. To print the entire document, click Print Document.

Reports

Managers have access to run reports for your team (direct and indirect reports).

One report is of particular importance for the Mid-Year process:
Mid-Year report: To review completion of Mid-Year Reviews for your direct and indirect reports.

For more information on running reports, refer to the Reports Quick Reference guide.