Exempt Staff Online Performance Management
Mid-Year Review—Quick Reference Guide

Log On to eNDeavor
1. Open your web browser and go to: endeavor.nd.edu
2. At the Welcome screen, enter your Notre Dame username and password.
3. Click Login. This takes you to the Home Dashboard screen.

Check Your Task List for Tasks to Be Completed
1. On the Home Dashboard, look at My To Do List for items to be worked on. When your manager approved the goals for your position, you should have received an email notification. You will see the open task: Step 3: Please complete your mid-year review <your name>. It will also indicate a status of Not Started and a task Due Date.

   ![My To Do List](image)

2. Click Do (Action column). In the Overview screen, the workflow graphic indicates you are on Step 3: Employee Completes Mid-Year Comments of the nine-step performance management process.

Enter Information for Goals
1. At the top of the Overview screen, click the Goals tab.
2. Scroll down to the header, Goals and review the goals you may have established during Step 1.
3. Scroll down to the Employee Mid-Year Comments text box and enter information or examples to indicate the degree of progress on the stated goal.
   (If you have relevant examples saved in your Notebook, click on Notes ( ) button at the top of the screen. Copy and paste from the Notebook entries or other electronic documents into the Employee Mid-Year Comments text box.
4. Continue this process for each of the goals.
5. (If changes have occurred that require a change in any of the measures, dates or goals themselves, enter a brief explanation in the Comments text box. Do not remove them unless this has been discussed with your manager.)

Enter Information for Behavioral Competencies
1. Click the Behavioral Competencies tab.
2. Enter examples in the Employee Mid-Year Comments text box for each of the competencies.
3. As with Expectations, you may wish to copy and paste from your Notebook entries, using the Notes button.
4. See information on Appraisal Writing Wizard which can assist you in knowing what to write for the various competencies.

Enter Information for Development Plan
1. Click the Development Plan tab.
2. Scroll down to the Employee Mid-Year Comments text box and enter information regarding progress to date.
3. Continue this process for each of the Development Activities.
4. Update the Status regarding the degree to which the activity has been started, not started, completed, etc.
5. (If changes have occurred that require a change in any of the Development Activities, enter a brief explanation in the Comments text box. Do not remove them UNLESS you and your manager have already discussed.)

Add, Delete or Modify a Development Activity
Add
1. Click the Development Plan tab.
2. You may add, delete or change a Development Activity prior to sending your review to your manager if you have mutually discussed and agreed to do so.
3. Scroll to the top of the window and click once on the Add Development Activities button. NOTE: It may appear that nothing has happened, but look under the information box— the indicator now shows: Development Activity: Plan 1 of 4.
4. Press Page Down on your keyboard to Development Plan 4 of 4. Enter your additional activity in the text field, as well as the Target Date, Status, Metrics and Action Plan in the appropriate text fields.

Remove
1. Click the Development Plan tab.
2. Scroll down to activity you wish to remove.
3. Click the Remove Development Activities button in the upper left corner of the activity’s box you wish to remove.
4. Click OK to the prompt box, to confirm the deletion.

Modify
1. Click the Development Plan tab.
2. Scroll down to the activity you wish to modify.

Enter Summary of Performance
This section allows you to enter a summary statement(s) about your progress to date regarding your goals, behavioral competencies, and development plan. Enter your overall perception of your progress.
1. Click on Summary of Performance tab.
2. Enter your comments in the Employee's Mid-Year Comments text box.

Send Completed Mid-Year Review to Your Manager
1. When you are satisfied that your expectations and development plan are complete, click the Send Forward button at the top of the window.

   ![Send Forward](image)

2. Click Yes in the prompt box to confirm that you want to send the mid-year review forward.
3. In the System Confirmation box, click Return to Home.
4. Step 3: task is now removed from My To Do List.

Sign Out of eNDeavor
When you are done working in eNdeavor, it is always a good idea to sign out of the system.
1. Click Sign Out (upper right-hand corner of the screen).

   ![Sign Out](image)

2. Click the Close button (red X) to close the browser window.
Save a Draft of Your Mid-Year Review.
If you are ever interrupted during your entry, you can save a draft to complete at a later time.

1. Scroll to the top of the screen and click **Save Draft**.
2. Click **Yes** to confirm save.
   **NOTE:** Though it may appear that nothing has happened, your mid-year review draft is now saved.
3. Click **Dashboard** from the Home menu on the left. Your To Do List still lists your Step 3 task, but its status is now “started.”

Resume work on your draft
1. Open your web browser and go to **endeavor.nd.edu**
2. From My To Do List, click **Do**. Click the **Goals, Behavioral Competencies, Development Plan** tab.
3. To edit existing mid-year comments: Scroll to the appropriate comment text box and revise content.
4. To complete mid-year review and send to manager: Scroll to top of page and click **Send Forward**, then click **Yes** to confirm. Click **Return to Home**. Step 3 task is now removed from My To Do List.

View Mid-Year Review after Sending Forward
If you want to view your expectations and development activities AFTER they have already been sent to your manager:

1. From the My Performance Reviews panel on your Home Dashboard, click the link to the Review Name you wish to view.
2. Click **View Form** at the top of the Performance Process Status list.
3. Scroll down to see your recently sent forward Mid-Year Review.

Appraisal Writing Wizard
You may want to utilize the **Appraisal Writing Wizard**, which is based on the Behavioral Competency Model, to assist you in describing your behavioral competency examples. Follow the steps below when you are working in the **Behavioral Competency** section:

1. Click on the **Appraisal Writing Wizard** button located under the Employee Mid-Year Comments text box.

2. The rating labels listed under the “Mastery” levels in the Appraisal Wizard are different than the ones used on the paper forms. Note that the actual ratings labels we use are noted in the description of the behaviors associated with the various levels.
3. Click on the behaviors of the level that most closely match your level of performance. They will appear in the **Suggested Comments** box. Copy the appropriate comments and minimize or close the Wizard. Paste into the text box, **Employee Mid-Year Comments**, some of the behavioral descriptions that match how you view your own performance.
4. Close the **Appraisal Writing Wizard** by clicking on the close button at the upper right corner of the Wizard screen.
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