

Mid-Year Review

Managers



For Managers participating in mid-year performance reviews, this guide will show you how to start and complete the mid-year review.

Please refer to the Performance Goals QRG for assistance in creating goals for yourself and your team.

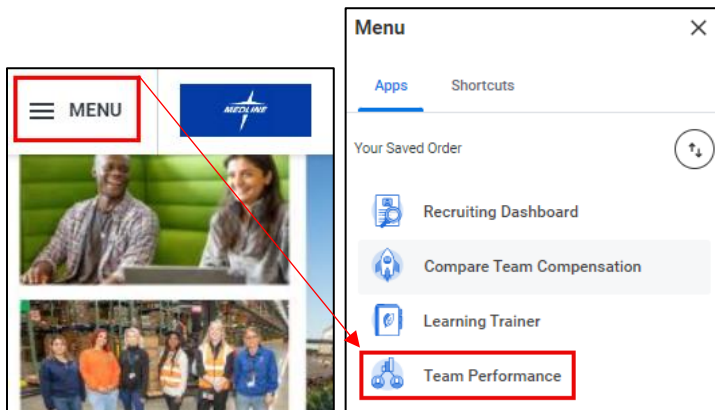
Mid-year reviews will only include measurable goals related to your position. This review does not include development items. Please refer to the Development Plan and Development Items QRGs for assistance with that process.

Starting the mid-year review

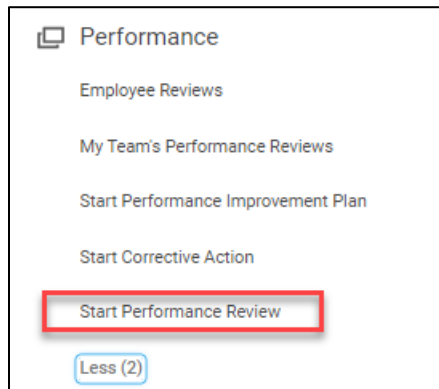
Mid-year reviews are part of the annual review process and are conducted as a stand-alone event each year. Performance Goals can be added by you, your organization, and employees and are discussed during this process.

Your organization may have created a mid-year template for you. If this has been created, you can skip to step 4 below. If they have not, please follow steps 1-3 below to create these for your team.

To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance** application.



1. From the **Performance** menu on the right-hand side of the screen, select **Start Performance Review**.



2. Next, fill out the details of the performance review:

A screenshot of a form titled 'Start Performance Review for Employee' with a close button (X) in the top right corner. The form contains four required fields, each marked with a red asterisk: 'Employee' (a text input field with a dropdown arrow, labeled 'a.'), 'Review Template' (a dropdown menu with a list icon, labeled 'b.'), 'Period Start Date' (a date input field with a calendar icon and placeholder 'MM/DD/YYYY', labeled 'c.'), and 'Period End Date' (a date input field with a calendar icon and placeholder 'MM/DD/YYYY', labeled 'd.'). At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

- a. Enter the name of the **Employee** who is receiving the mid-year review.
- b. From the **Review Template** drop-down menu, select **Mid Year Review**.
- c. Enter the **Period Start Date**.
- d. Enter the **Period End Date**.



Please note that time periods for reviews must be unique. You cannot have multiple reviews open for the same employees with overlapping time periods.

3. Click **Submit** when you have entered all the details for the performance review.

The screenshot shows a dialog box titled "Start Performance Review for Employee" with a close button (X) in the top right corner. It contains four input fields, each with a red asterisk indicating a required field: "Employee" (with a dropdown menu showing "Tim Keyboard"), "Review Template" (with a dropdown menu showing "Mid Year Review"), "Period Start Date" (with a date picker showing "01/01/2024"), and "Period End Date" (with a date picker showing "06/30/2024"). At the bottom right, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red rectangular box.

4. You will receive a task titled "Manager Evaluation: Mid Year Review" in your **My Tasks Inbox**. Click the task to open its details on the right-hand side of the screen.
5. Click **Get Started**.

The screenshot displays the "My Tasks" interface. On the left is a sidebar with navigation options: "All Items", "Saved Searches", "Filters", "Archive", "Bulk Approve", and "Manage Delegations". The main area is titled "All Items" and shows a list of tasks. The first task, "Manager Evaluation: Mid Year Review: Tim Keyboard", is highlighted with a red box and labeled "4.". Below it are other tasks like "Set Content: Goal Setting: Alma Mendez" and "Your New Employee Started Today". On the right side, the details for the selected task are shown, including the review period "01/01/2024 - 06/30/2024" and instructions. At the bottom right of the details panel, a "Get Started" button is highlighted with a red box and labeled "5.". A red arrow points from the highlighted task in the list to the "Complete Manager Evaluation" header in the details panel.

6. You will be guided through the steps that are listed on the left-hand side of the screen. Mid-year reviews only have two steps. If your employee has not entered any goals, you can add them now by clicking on **Add**.

The screenshot shows the 'Complete Manager Evaluation' interface. On the left sidebar, the 'Goals' step is highlighted with a red box. The main content area is titled 'Goals' and contains a single button labeled 'Add', which is also highlighted with a red box. At the bottom of the screen, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Save for Later', and 'Close'.

7. If your employee has existing goals, you can find and add them by searching in the top search box. You are able to **Add** and **Remove** goals as needed and click **Next** to review. It is not necessary to include all goals in the mid-year review.

The screenshot shows the 'Complete Manager Evaluation' interface with the 'Goals' section expanded. At the top of the 'Goals' section, there is a search bar labeled 'Add Existing' with a search icon, highlighted with a red box. Below the search bar, there are two text input fields for 'Goal' and 'Description', each with a rich text editor toolbar. Below these fields are dropdown menus for 'Due Date' (MM/DD/YYYY), 'Status' (select one), and 'Manager'. At the bottom of the 'Goals' section, there are two buttons: 'Remove' and 'Add', both highlighted with red boxes. At the bottom of the screen, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Save for Later', and 'Close'.

8. Review the goal information and click **Submit**.

Complete Manager Evaluation

Manager Evaluation: Mid Year Review: Tim Keyboard

Actions

01/01/2024 - 06/30/2024

Goals

Review and Submit

Goals

Goal Data entry

Description Enter data each day.

Due Date (empty)

Status In Progress

Manager

Comment

Submit Save for Later

9. You will receive a task titled “Manager Evaluation: Mid Year Review” in your **My Tasks Inbox**. This task prompts you to meet with your employee and should not be completed until after the meeting has occurred. Click the task to open its details on the right-hand side of the screen.

10. Click **Get Started** after you have had the meeting with the employee.

My Tasks

All Items 558 items

Search: All Items

Advanced Search

Manager Evaluation: Mid Year Review: Tim Keyboard 05/28/2024 ☆

Effective: 06/30/2024

Propose Compensation Hire: Learning Demo - Accountant 05/28/2024 ☆

Effective: 05/28/2024

Set Content: Goal Setting: Alma Mendez 05/22/2024 ☆

Effective: 04/26/2024

Provide Manager Review Comments

Manager Evaluation: Mid Year Review: Tim Keyboard ...

Evaluated By Kristin Reep

Review Period 01/01/2024 - 06/30/2024

Now it's time to meet with your employee to discuss the review and your feedback. Once the meeting has taken place, advance to the last page of this form and select 'Acknowledge Review Discussion Complete'.

Clicking SUBMIT will route the review to the employee's Workday inbox for their acknowledgement.

Get Started

11. Review the goals under the Summary section and click **Next** to **Submit the Acknowledgement**.

The screenshot shows a web form titled "Provide Manager Review". On the left, a sidebar contains a "Comments" section with details: "Manager Evaluation: Mid Year Review: Tim Keyboard", an "Actions" button, the date range "01/01/2024 - 06/30/2024", and "Evaluated By: Kristin Reep". Below this, a navigation menu has "Summary" and "Acknowledgement" options, with "Acknowledgement" being the active selection. The main content area is titled "Acknowledgement" and includes a "Manager" section with a "Status" dropdown menu currently set to "Acknowledge Review Discussion Complete". Below the status is a "Comment" text area containing the text "The meeting happened." and a rich text editor toolbar. At the bottom right, there are two buttons: a blue "Submit" button and a "Save for Later" button.

12. The final step will route to the employee to acknowledge the meeting.

The screenshot displays a "My Tasks" dashboard. On the left, a sidebar lists "All Items", "Saved Searches", and "Filters". The main area, titled "All Items", shows a search bar and a list of tasks. One task is highlighted: "Propose Compensation Hire: Learning Demo - Accountant" with an effective date of "05/28/2024". On the right, a "Success! Event submitted" notification box is visible, stating "Up Next: Tim Keyboard | Provide Employee Review Comments" and providing a "View Details" link. Below the notification, a table header for "Effective Date & Reason" is partially visible.