

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.

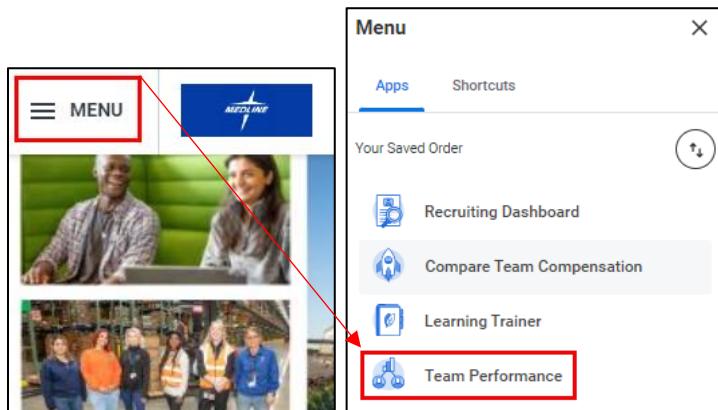
Mid-year reviews will only include measurable goals related to your position. This review does not include development items. Please refer to the Development Plan and Development Items QRGs for assistance with that process.

Starting the mid-year review

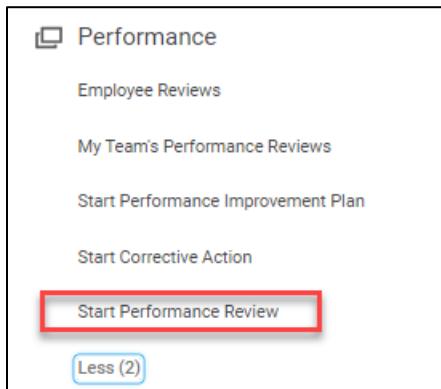
Mid-year reviews are part of the annual review process and are conducted as a stand-alone event each year. Performance Goals can be added by you, your organization, and employees and are discussed during this process.

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 'Start Performance Review for Employee' dialog box. It contains four input fields: 'Employee' (marked with a red asterisk), 'Review Template' (marked with a red asterisk), 'Period Start Date' (marked with a red asterisk), and 'Period End Date' (marked with a red asterisk). Each field has a red letter next to it: 'a.' for Employee, 'b.' for Review Template, 'c.' for Period Start Date, and 'd.' for Period End Date. At the bottom are 'Cancel' and 'Submit' buttons.

- 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.

Start Performance Review for Employee

Employee: Tim Keyboard

Review Template: Mid Year Review

Period Start Date: 01/01/2024

Period End Date: 06/30/2024

Cancel Submit

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**.

My Tasks

All Items

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

Effective: 06/30/2024

Complete Manager Evaluation 4.

Manager Evaluation: Mid Year Review: Tim Keyboard

Created: 05/28/2024 | Effective: 06/30/2024

PDF

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

We encourage regular check-ins between employee and manager to talk about performance and growth throughout the year. This is a good opportunity to provide a summary of progress against performance goals and have a performance discussion.

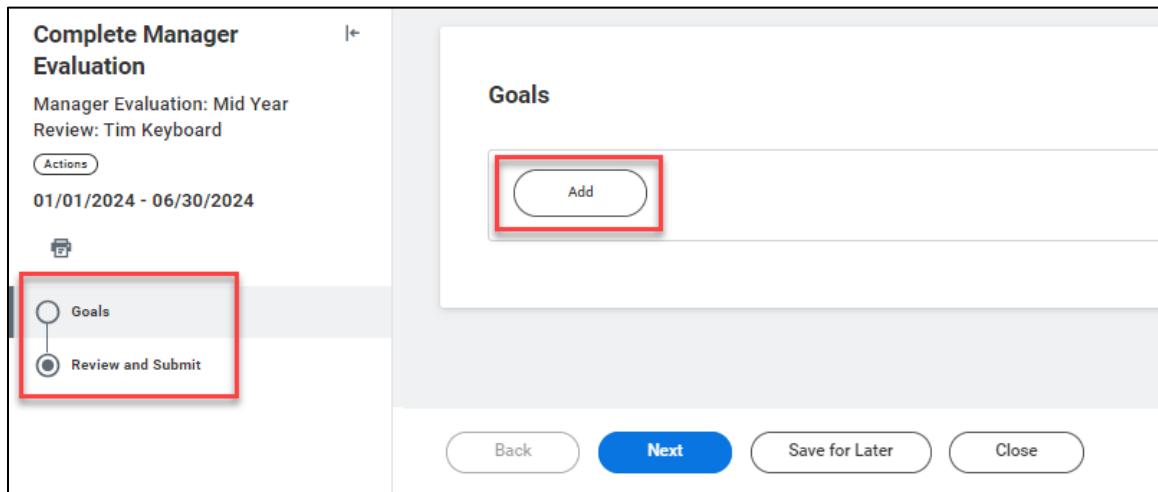
Please meet with the employee, discuss their goals and any assistance they might need for a strong finish and record any comments in this document.

The Performance Check In process includes the following steps:

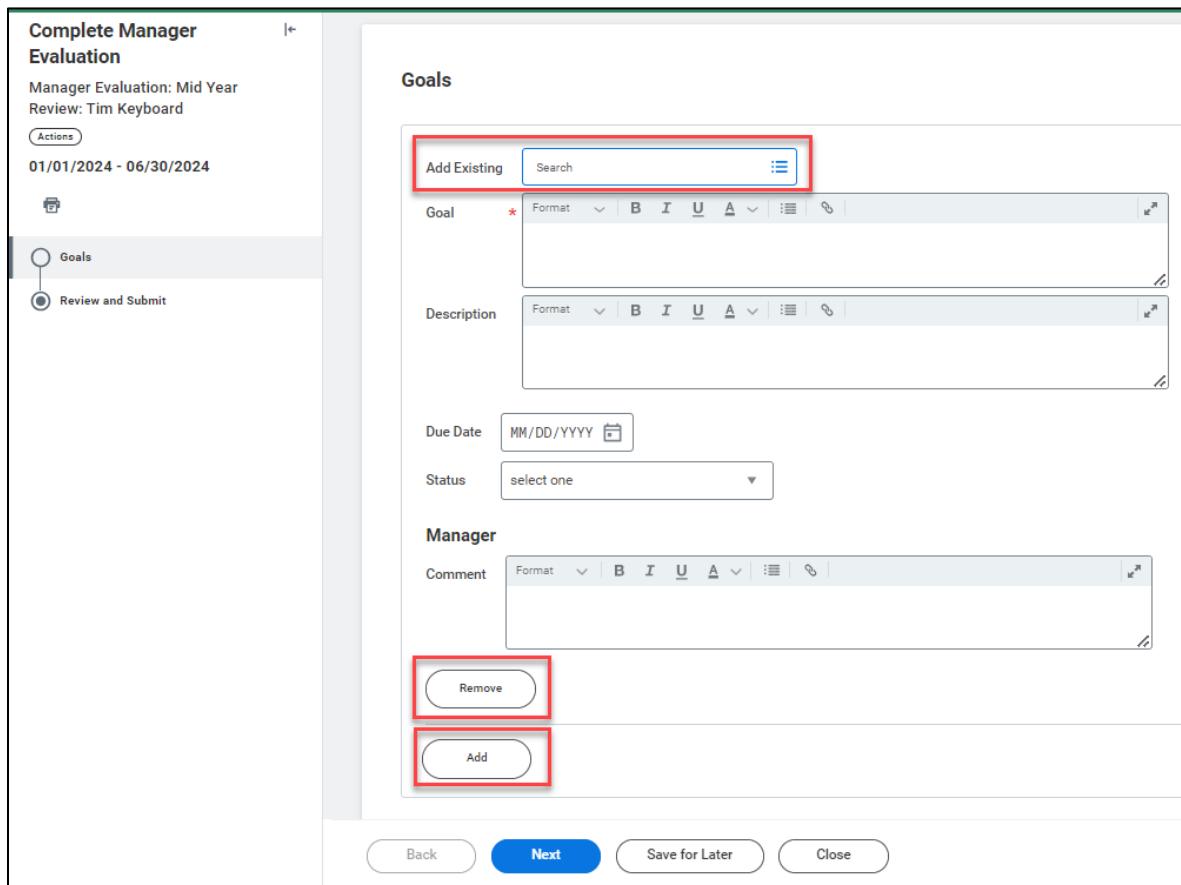
- Manager Evaluation
- Employee & Manager meeting to discuss performance
- Employee Acknowledgement

Get Started 5.

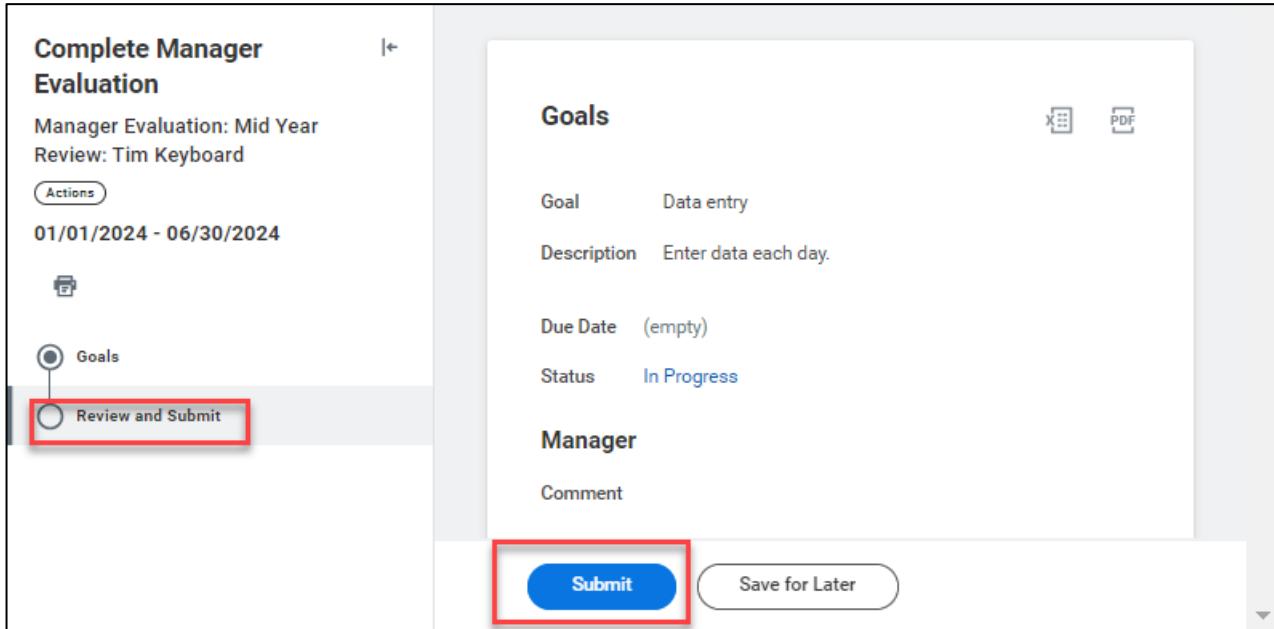
6. You will be guided through the steps that are listed on the left-hand side of the screen. Mid-year reviews only have two steps. If your employee has not entered any goals, you can add them now by clicking on **Add**.



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.



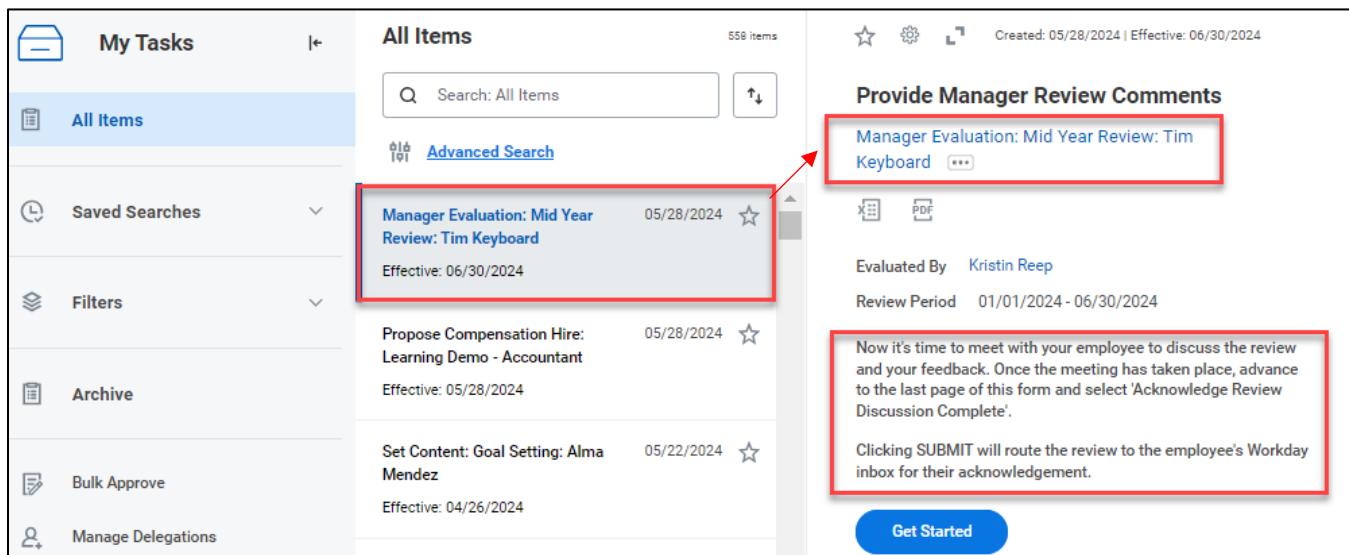
8. Review the goal information and click **Submit**.



The screenshot shows the 'Complete Manager Evaluation' page. On the left, there's a sidebar with 'Actions' and a date range '01/01/2024 - 06/30/2024'. Below that is a 'Goals' section with a 'Review and Submit' button highlighted with a red box. On the right, a larger panel titled 'Goals' displays the goal details: 'Goal: Data entry', 'Description: Enter data each day.', 'Due Date: (empty)', and 'Status: In Progress'. Below this is a 'Manager' section with a 'Comment' field and a 'Submit' button, which is also highlighted with a red box. There are 'Save for Later' and 'PDF' buttons at the bottom.

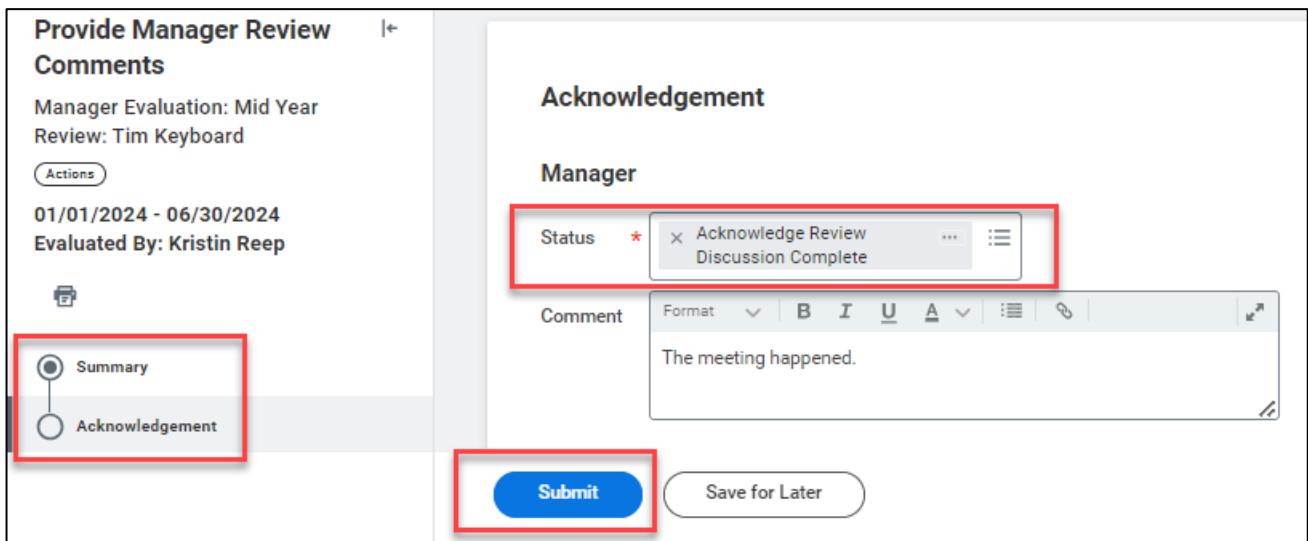
9. You will receive a task titled “Manager Evaluation: Mid Year Review” in your **My Tasks Inbox**. This task prompts you to meet with your employee and should not be completed until after the meeting has occurred. Click the task to open its details on the right-hand side of the screen.

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



The screenshot shows the 'My Tasks' inbox. On the left, there are sections for 'All Items', 'Saved Searches', 'Filters', 'Archive', 'Bulk Approve', and 'Manage Delegations'. The 'All Items' section shows a task titled 'Manager Evaluation: Mid Year Review: Tim Keyboard' with a due date of '05/28/2024' and an effective date of '06/30/2024'. This task is highlighted with a red box. On the right, the task details are shown: 'Manager Evaluation: Mid Year Review: Tim Keyboard' (with a 'PDF' button), 'Created: 05/28/2024 | Effective: 06/30/2024', 'Evaluated By: Kristin Reep', 'Review Period: 01/01/2024 - 06/30/2024', and a note: '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.' A 'Get Started' button is at the bottom of this panel.

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



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

