# Mid-Year Review
HR Partners

For organizations participating in mid-year performance reviews, this guide will show HR Partners how to launch the mid-year review template to their organizations.
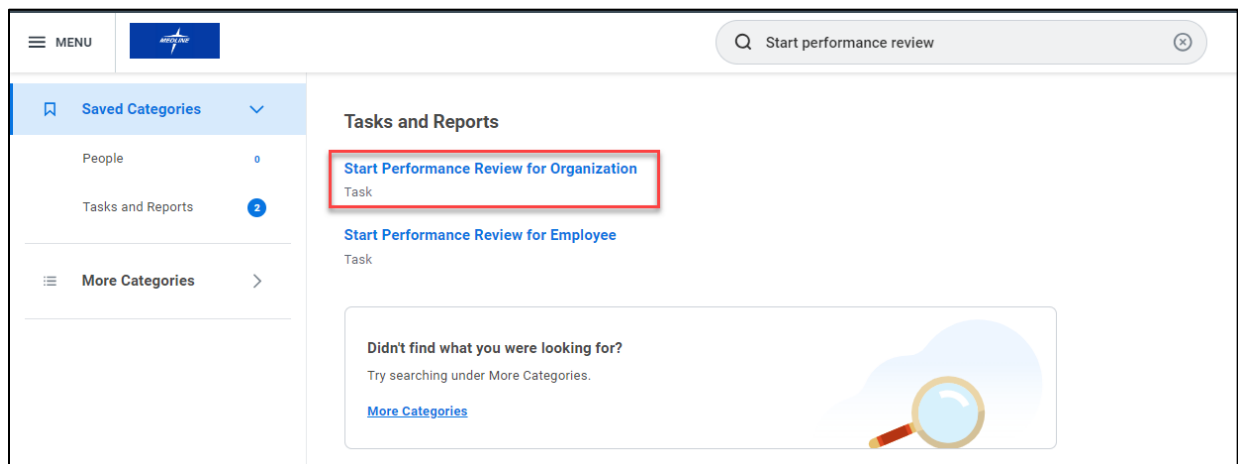
Launching Mid-Year Template

Mid-year reviews are part of the annual review process and are conducted as a stand-alone event each year.

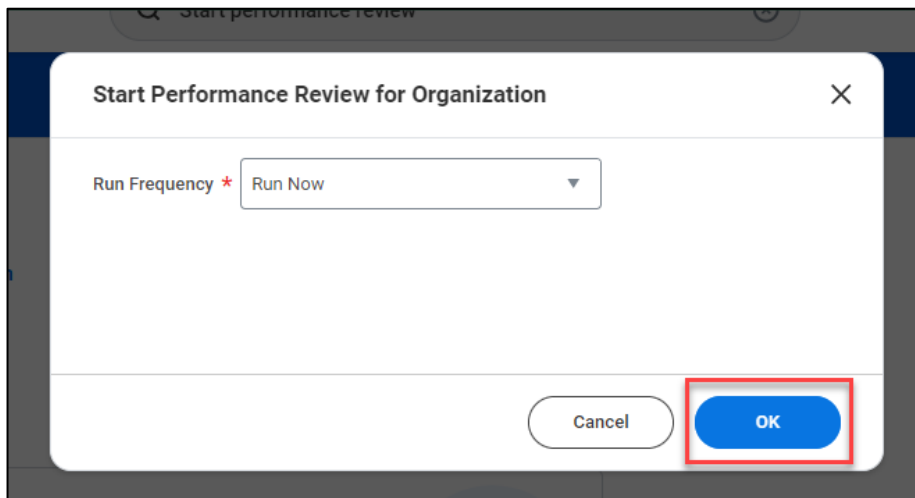To mass create templates for your organization, complete the steps below.

To get started, in the **Search** bar from the main screen, type **Start Performance Review**.
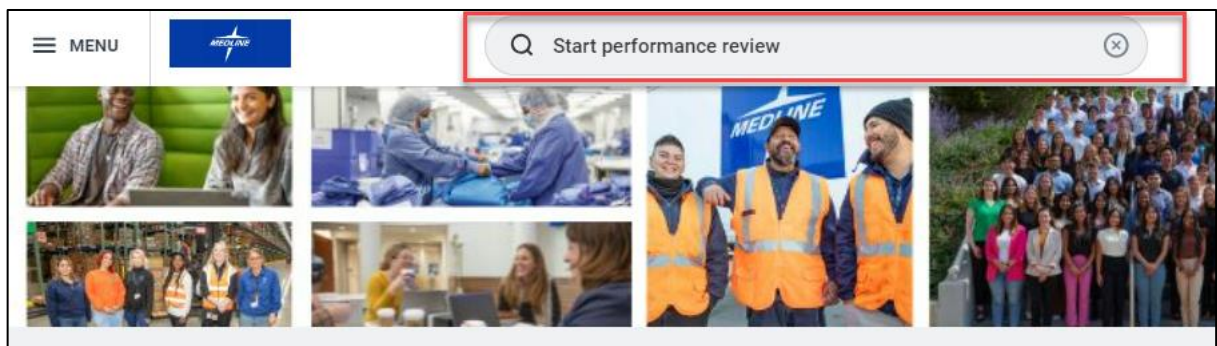
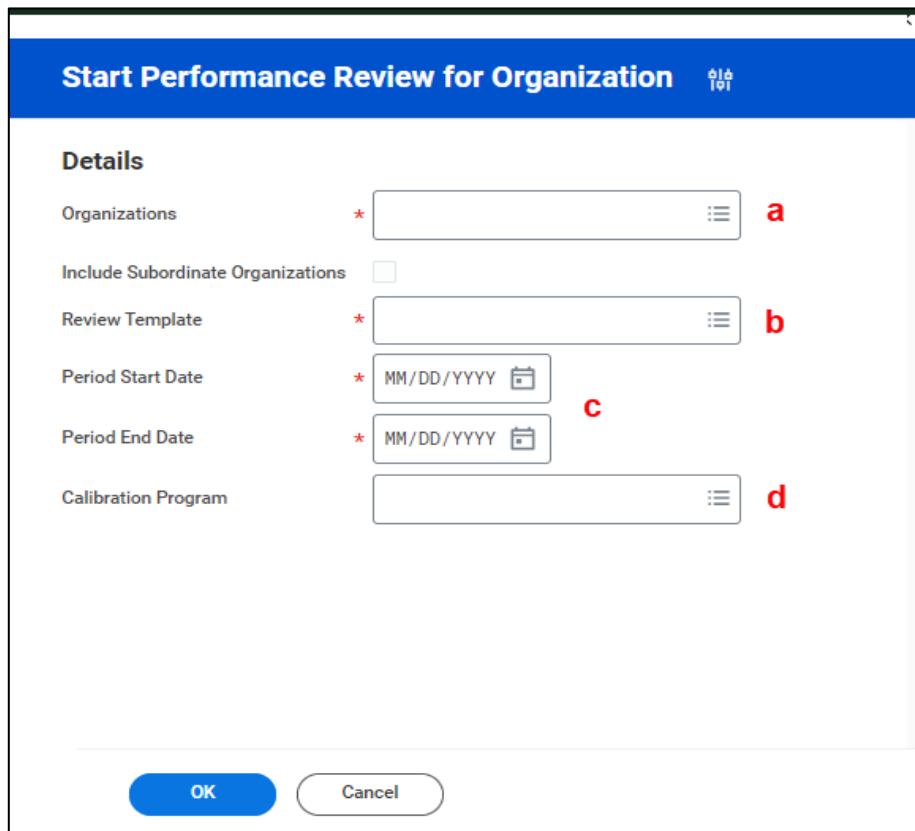1. Select **Start Performance Review for Organization.**

2. Run Frequency defaults to **Run Now** but other options are available. Click **OK**.

Start Performance Review for Organization

Run Frequency * Run Now

Cancel   **OK**

3. Fill in details as needed.

Start Performance Review for Organization

Details

Organizations *   a

Include Subordinate Organizations

Review Template *   b

Period Start Date * MM/DD/YYYY   c

Period End Date * MM/DD/YYYY

Calibration Program   d

OK   Cancel

a. Choose organization and check subordinate box if necessary.
b. Select review template.
c. Date should be consistent to avoid overlap. Use 1/1/xxxx-12/31/xxxx for all employees.
d. Ignore this Calibration Program box.
e. Click **OK**.

4. You'll be sent to a confirmation screen. You can check the status by clicking **Refresh.** Larger organizations will take longer to process. See step 6 if you want to see the final results.
5. Click **Done** to exit. You do not have to stay on this screen until completion. The process will complete in the background.

Start Performance Review Confirmation

The performance review process has started successfully. Performance reviews are in the process of being created for each employee in the organization(s) that is eligible for the employee review template. To view results of the performance review process, please refer to the Process Status section. To get an up to date view of the process, click the Refresh push button.

Organization(s)	xxxxxxxxxxx
Include Subordinate Organizations	Yes
Review Template	Mid Year Review
Period Start Date	xx/xx/xxxx
Period End Date	xx/xx/xxxx

Process Status

Refresh

Status	Initiated
Submitted by	xxxxxxxxxxx
Date Submitted	06/05/2024 07:05 AM

Done

6. If you stay on the confirmation screen and refresh, when completed you will see how many reviews were created by clicking on the number at the bottom.

Performance Review for Organization Initiation

Organization(s)	xxxxxx
Include Subordinate Organizations	Yes
Review Template	Mid Year Review
Period Start Date	xx/xx/xxxx
Period End Date	xx/xx/xxxx

Process Status

Status	Completed
Submitted by	xxxxxx
Date Submitted	06/05/2024 07:05 AM
Completed On	06/05/2024 07:05 AM
Percent Complete	100.00%
Performance Reviews Created	2