

Mid-Year Review

HR Partners



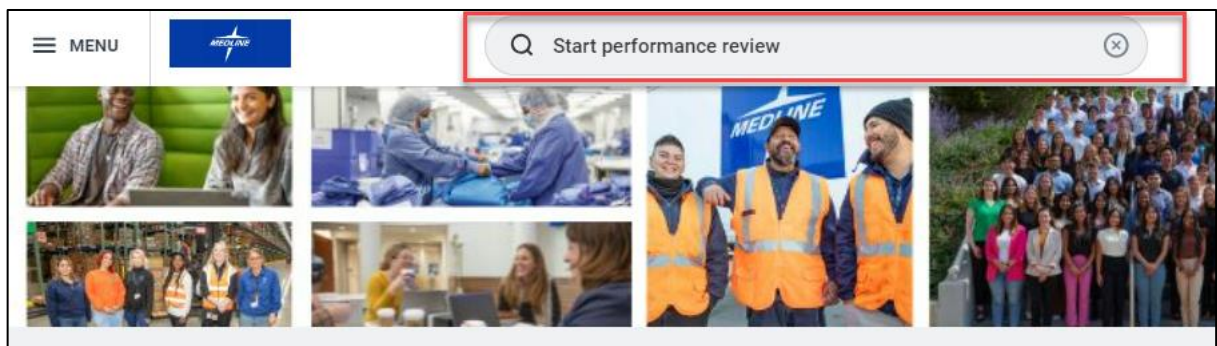
For organizations participating in mid-year performance reviews, this guide will show HR Partners how to launch the mid-year review template to their organizations.

Launching Mid-Year Template

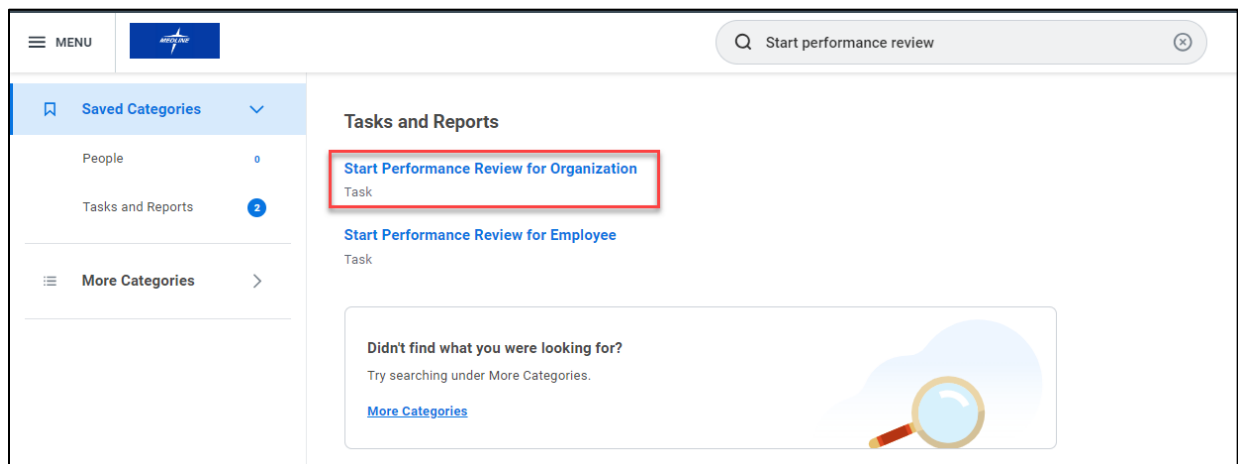
Mid-year reviews are part of the annual review process and are conducted as a stand-alone event each year.

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

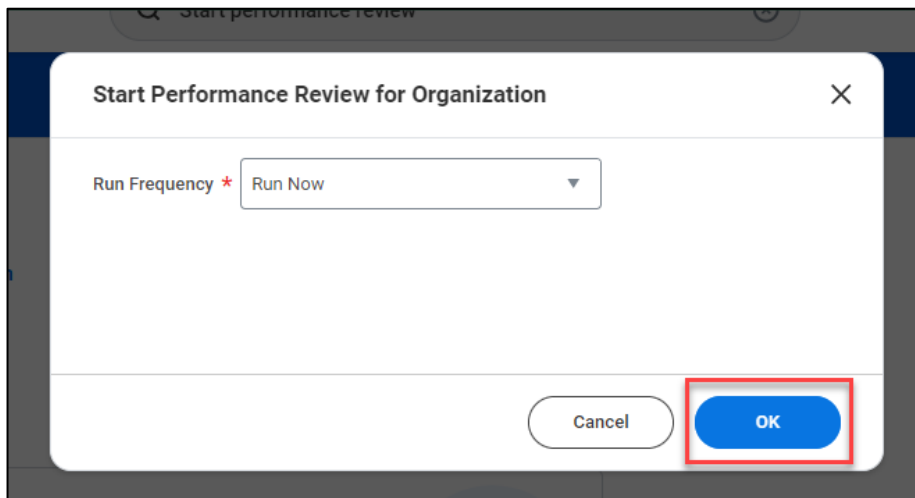
To get started, in the **Search** bar from the main screen, type **Start Performance Review**.



1. Select **Start Performance Review for Organization**.

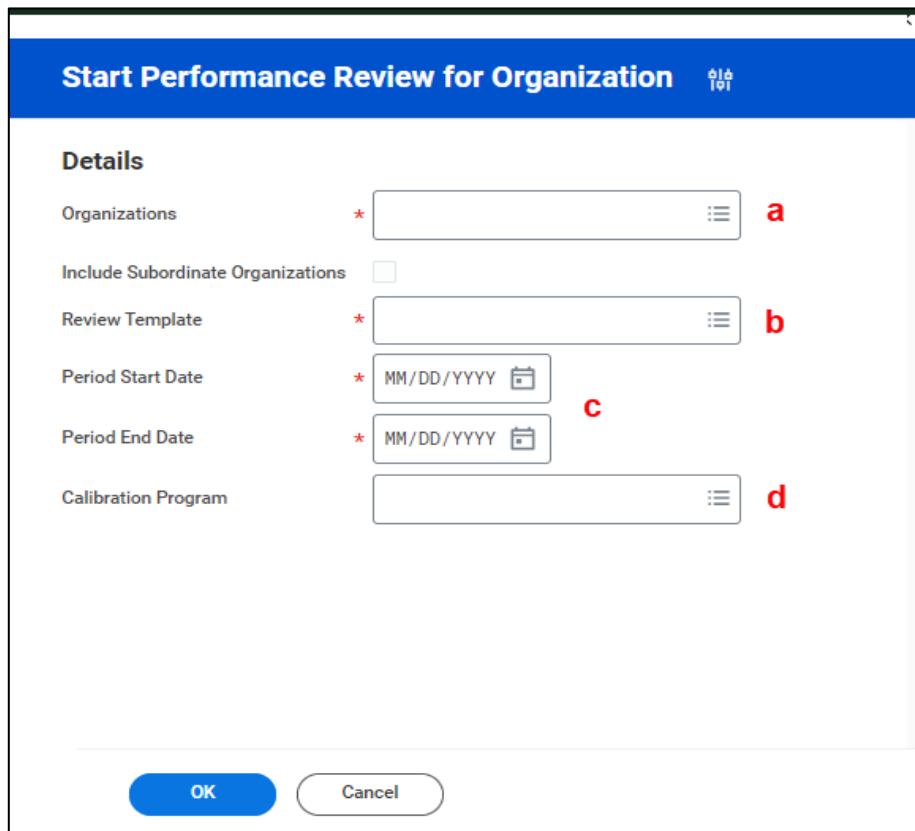


2. Run Frequency defaults to **Run Now** but other options are available. Click **OK**.



The screenshot shows a dialog box titled "Start Performance Review for Organization". It has a close button (X) in the top right corner. Below the title, there is a label "Run Frequency *" followed by a dropdown menu currently showing "Run Now". At the bottom of the dialog, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red rectangular border.

3. Fill in details as needed.



The screenshot shows a form titled "Start Performance Review for Organization" with a user icon in the top right. The form is divided into a "Details" section. It contains the following fields:

- Organizations**: A dropdown menu with a red asterisk and a red letter **a** to its right.
- Include Subordinate Organizations**: A checkbox.
- Review Template**: A dropdown menu with a red asterisk and a red letter **b** to its right.
- Period Start Date**: A date picker with a red asterisk and a red letter **c** to its right.
- Period End Date**: A date picker with a red asterisk.
- Calibration Program**: A dropdown menu with a red letter **d** to its right.

At the bottom of the form, there are "OK" and "Cancel" buttons.

- 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) **XXXXXXXXXX**

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 **XXXXXXXXXX**

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**