

# Employee Evaluations Mid-Year

## STEP BY STEP GUIDE

This step by step guide will walk you through the process of completing an employee performance review during the middle of the year.

### Employee Evaluation Workday Workflow

#### APRIL – MAY

1. **Supervisor** – Initiates & Builds Evaluation (no scoring yet)
2. **Employee** – Reviews & Approves (no scoring yet)
3. **Manager** – Reviews & Approves (no scoring)

#### JUNE

4. **Employee** – Overall Self Evaluation & Rating

#### AUGUST

5. **Supervisor** – Overall Employee Evaluation & Rating
6. **Manager** – Reviews Overall Employee Evaluation & Rating
7. **HR** – Reviews & Approves
8. **Supervisor** – Schedule One-on-One Meeting & Discuss Overall Rating
  - a) Click **Submit** once meeting is scheduled.
9. **Employee** – Acknowledgment that One-on-One Meeting was held
10. **Supervisor** – Acknowledgment that One-on-One Meeting was held

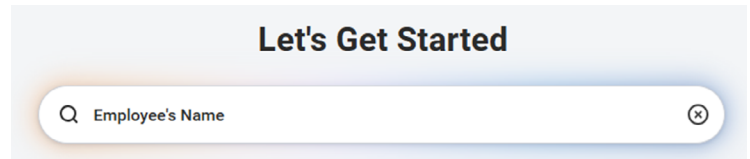
# STEP 1

# Initiate Performance Review

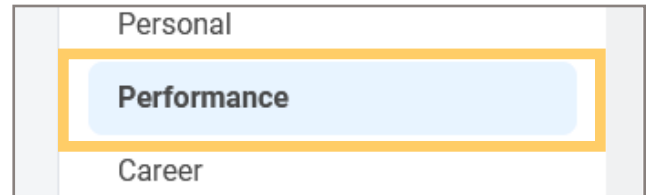
**APRIL – MAY**

(Only When HR Does Not Initiate)

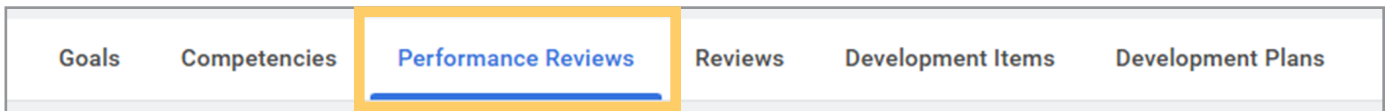
- 1) Search the **employee's name** in the search bar.



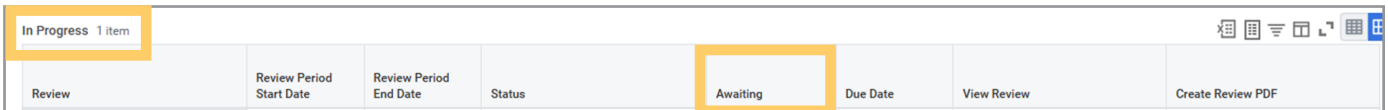
- 2) Click on **Performance** on the side bar.



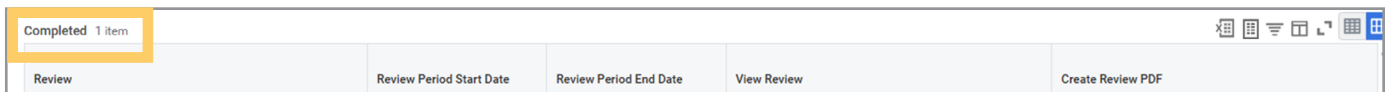
- 3) Click on the **Performance Reviews** tab.



This will tell you the status of the Evaluation (In Progress or Completed). If the status is **In Progress**, it will show you who is 'Awaiting' to move it forward.



Once it is in the **Completed** section, it is written in stone. No further steps need to be taken, and you cannot delete or cancel it.



- 4) At the bottom of the page, click the **Start Performance Review** button.

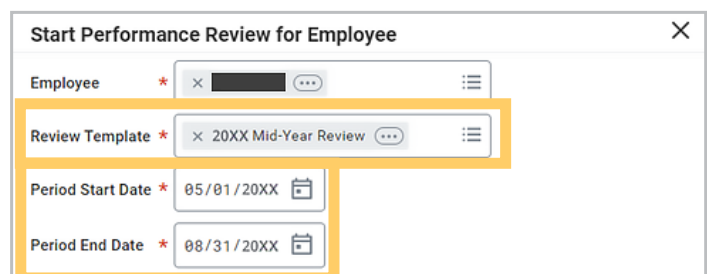


- 5) **Review Template** → **20XX Mid-year**.

- 6) **Period Dates** → **May 1 - August 31**

**Dates for new hires:**

Employee's start date to August 31



## STEP 2 Employee Reviews & Approves APRIL - MAY The Evaluation Template

Now your employee must go to their Workday Task Inbox and review their Evaluation. They may provide notes if needed.

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## STEP 3 Manager Reviews & Approves APRIL - MAY The Evaluation Template

Once the employee clicks **Approve**, it will go to your manager's Workday Task Inbox for **review and approval**.

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## STEP 4 Employee Submits Overall Self JUNE Evaluation & Rating

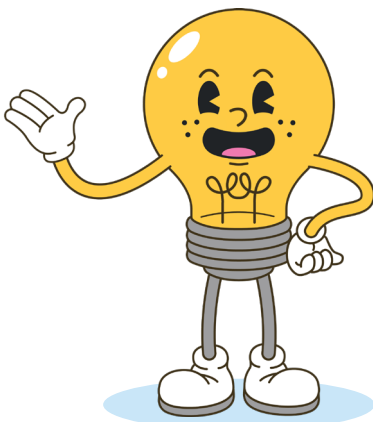
Once the manager approves, it will go back to the employee to **submit a self-evaluation**, which will be located in their Workday Task Inbox.

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## STEP 5 Supervisor Reviews Overall Employee AUGUST Evaluation & Rating

Next, it will go back to the supervisor to **review and provide the ratings**.

Find more information  
on the [Intranet](#).



As the mid-point of the review period approaches, evaluate the actual performance to-date in contrast to the objectives set at the beginning of the review period.

Rating Scale Definitions:

- **Achieved Outstanding Results** - Performance is superior, far above what is required. Employee consistently exceeds highest standards. Employee has demonstrated exceptional job mastery in all major areas of responsibility. Achievement and contributions to the organization are of marked excellence.
- **Achieved More Than Expected Results** - Performance is consistently above normal expectations and standards. Most goals, objectives and targets were achieved above the established standards.
- **Achieved Expected Results** - Performance met expectations in terms of quality of work, efficiency and timelines. Critical goals were met. Performance is consistent with what is expected and considered acceptable. Demonstrates techniques and procedures necessary for efficient job performance.
- **Partially Achieved Expected Results** - Performance is generally below the minimum requirements for the job. One or more of the critical goals were not met. More guidance, development, or training may be needed to improve performance.
- **Expected Results Not Achieved** - Performance does not meet minimum job requirements. Reasonable progress towards critical goals was not made. Significant improvement is needed in one or more important areas. Lack of improvement may result in disciplinary action.

**STEP 6**  
**AUGUST**

## Manager Reviews Overall Employee Evaluation & Rating

It will then go back to the Manager to **review the overall rating**.

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**STEP 7**  
**AUGUST**

## HR Reviews Overall Employee Evaluation & Rating

Next, it will go to HR to **review**.

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**STEP 8**  
**AUGUST**

## Supervisor Schedules One-on-One Meeting to Discuss Rating

The supervisor will **schedule a one-on-one meeting** with the employee to review and discuss their evaluation ratings. Once the meeting has been scheduled, click **Submit**.

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**STEP 9**  
**AUGUST**

## Employee Acknowledgment of One-on-One Meeting

The employee will acknowledge that the One-on-One meeting was held.

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**STEP 10**  
**AUGUST**

## Supervisor Acknowledgment of One-on-One Meeting

The supervisor will acknowledge that the One-on-One meeting was held.