Talent & Performance: Midyear Review

The 2019 Midyear Review template allows for leaders to consider and record: Goal Evaluation to date, Competency Review & Feedback, Summary & Employee Conversation.

NOTE. Any updates made by employee to goals AFTER template is launched will NOT be reflected in midyear template.

COMPLETE MANAGER GOAL EVALUATION

Review each goal description and offer comments in Activity Stream or comments for each goal. Comments provided on goals are visible by employee once template is submitted. Goal comments **WILL** automatically feed into year-end review template. NOTE: Updates made to goals DURING midyear process WILL be updated in employee individual goals tab.

From Manager Inbox:

- 2. Click on Manager Evaluation task for selected employee
- Review each goal for accuracy
- Click to delete goal (not recommended, recommend to archive)
- Click to view Activity Stream and add notes if needed

NOTE: Activity Stream provides shorter, more realtime updates throughout year of goal status

- 6. Click to edit goal and view milestone context
 - a. Click **View Milestones** to view individual milestones
 - b. Review in new window
 - c. Click close to return to goal review
- Add notes in comment box if necessary towards goal progress

NOTE: Comments provide overall assessment of goal performance at point in time

8. Click **Next** to move to Competencies section



A Vie	ew Mile	stones		•	
	d Mile			U	×
Ad		4 items			
Edi	it Mile	Milestone B	Due Date	Status	
		Milestone 1	05/25/2019	On Track	
	anag	 Develop leadership development pipeline framework by mapping existing offerings to roles/levels and partner with external vendor to assist with marketing and communication 	12/31/2019	Not Started	

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COMPLETE MANAGER COMPETENCY REVIEW

Review each competency description and offer comments relative to how employee might improve or continue leveraging a strength. Note: description is specific to employee level expectation (Individual Contributor, Manager, etc). You may enter only overall comments in summary section at bottom of page if preferred. Comments provided on competencies are visible by employee once template is submitted. Competency comments will NOT automatically feed into year-end review template.

	R	Competencies ~	
2.	Click for review	84	
	competency and add comments as needed	Competency Action oriented	
	~	Category Taking Initiative	
3.	Click to cancel action	Description Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm. Initiates timely action to address important issues. Mores quickly to seize opportunities. Takes on diffuct challenges without procrastinating.	
4.	Click to save comments	Takes action to resolve problems when they arise.	
	and move to next competency	Manager Evaluation	
	NOTE : You can also click in each competency to navigate	Format v B I U A v E % v	
	and make comments		

5. Click Next to move to Summary section

REVIEW EVALUATION SUMMARY & CONDUCT MIDYEAR CONVERSATION WITH EMPLOYEE

EMPLOYEE VISIBLITY 1.

Click SUBMIT only AFTER the midyear conversation with employee is complete. Upon submission, comments are final and will be visible to employee. 2. If you would like to prepare draft comments and finish later, click Save for Later on summary page and return to this form at any time from your Inbox.

- 1. Review goal updates and competency feedback for accuracy
- 2. Enter final overall comments if necessary
- 3. Click Save for Later to save the form for later use. Return from your Inbox
- 4. CONDUCT MIDYEAR **CONVERSATION WITH EMPLOYEE**
- 5. Click **Submit** to send to employee for their records and review

NOTE: Employees can view completed review by navigating to Employee Profile > Performance > Performance Reviews and locating Midyear review item.

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