



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
3. Review each goal for accuracy
4. Click  to delete goal (not recommended, recommend to archive)
5. Click  to view Activity Stream and add notes if needed

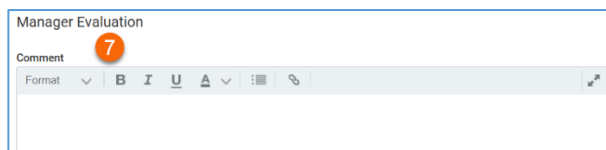
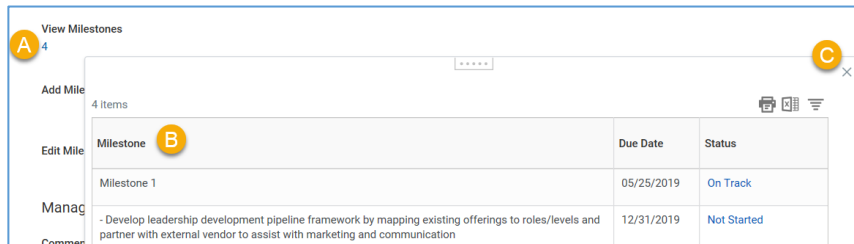
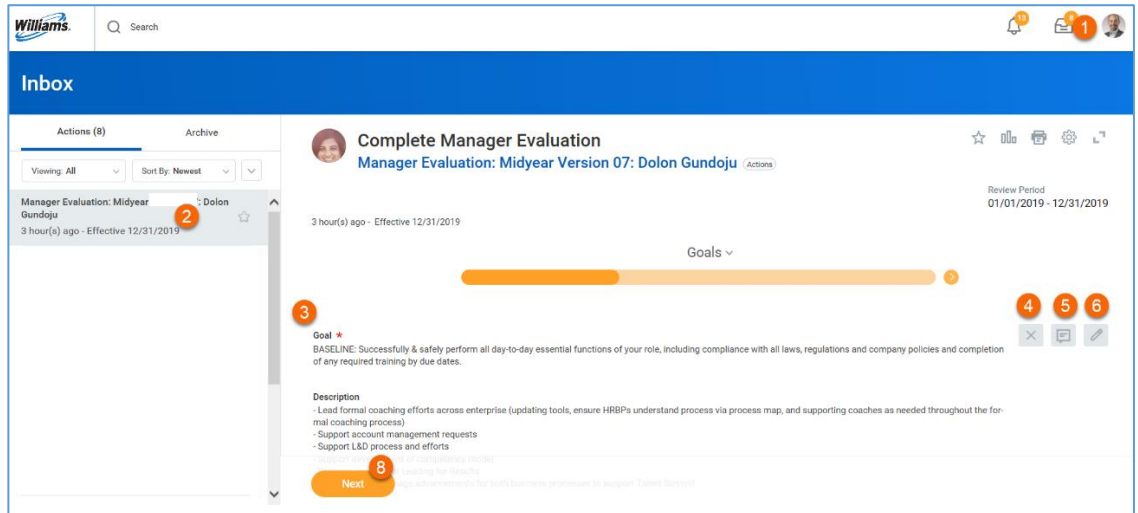
NOTE: Activity Stream provides shorter, more real-time updates throughout year of goal status

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

7. 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




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.

2. Click  to review competency and add comments as needed
 3. Click  to cancel action
 4. Click  to save comments and move to next competency
- NOTE:** You can also click in each competency to navigate and make comments
5. Click **Next** to move to Summary section

REVIEW EVALUATION SUMMARY & CONDUCT MIDYEAR CONVERSATION WITH EMPLOYEE

 **EMPLOYEE VISIBILITY**

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.