

## MID-YEAR PERFORMANCE REVIEW TEMPLATE

### THIS GUIDE IS FOR: MANAGERS

This guide provides the steps for completing the mid-year performance review in Workday@OK after the mid-year performance review template has been launched by agency HR Partner or manager based on your agency's business process.

1. Once logged into Workday@OK, navigate to **Awaiting Your Action** tasks. Select **Review Content** task for the desired employee. Next, select the full screen icon to expand your view. **Note:** If you don't receive a task for an employee, check to ensure the previous template has been closed. The previous review template must be closed before the next review template can be launched.

**Example:** For the 2025 mid-year template to be launched, the 2025 beginning year template must be closed.

2. Next, select the **Go to Guided Editor** that provides a step-by-step guide or **Go to Summary Editor** where you can edit everything on one page.
3. Review the content to see if edits are needed to the performance review responsibilities or weights. **Warning:** If no changes are needed, DO NOT select **Submit**. Instead select the **gear icon** at the top of the task and select **Skip This Task**. Select **OK**.

If changes are needed, select the **pencil icon** where you can make edits, then select **Submit**. **Warning:** Selecting **Submit** will send the review back through the approval steps to the employee and manager's manager.

4. Next, the employee will receive a **Self-Evaluation** task in their Workday@OK inbox to complete. The employee is required to enter their overall rating and comment. **Optional:** The employee may provide a comment on individual responsibilities and competencies, if desired. In addition, the employee can provide supporting documents that support their overall rating and comment.
5. Once the employee completes their self-evaluation, you will receive a **Manager Evaluation** task in your Workday@OK inbox to select and complete. You are required to enter your overall rating and comment. You will be able to view the employee's self-evaluation rating and comment(s). **Optional:** You may provide a comment on individual responsibilities and competencies, if desired. In addition, you may provide supporting documents that support your overall rating and comment by selecting the **Add** button under the **Supporting Documents** section.
6. Select **Submit**. Once submitted, the manager's manager will receive a **Manager Evaluation** task for the employee in their **Awaiting Your Action** tasks. The manager's manager will review and approve or send back to

employee's manager to make any changes if needed. Once approved by the manager's manager, it will be sent to the agency HR Partners' Workday@OK inboxes to review, approve or send back.

7. Once approved by an agency HR Partner, you will receive a **Schedule Evaluation Meeting with Employee** task in your **Awaiting Your Action** tasks. The purpose of this step is to give the manager control over when the employee sees the manager's overall rating in Workday@OK. Upon submission of this **To Do** task, the overall rating and comments will be sent to the employee to review, provide any additional comments, and complete the **Employee Acknowledgement**.
8. Once the employee completes the acknowledgement, you will receive a **Manager Evaluation** task in your **Awaiting Your Action** tasks. You can review any comments the employee provided and complete the **Manager Acknowledgement**. **Optional:** You may provide additional comments, if desired.
9. Select **Submit**. The mid-year performance review template is complete.

To **View** or **Create New PDF** of an employee's performance review, navigate to the employee's **Performance** section from their worker profile and select **Performance Reviews** tab located on the top.