Workday: Mid-Year Check-in Classified Staff

The Mid-Year Check-In provides a formal opportunity for supervisors and employees to discuss the employee's overall performance to-date. These conversations are key to clarifying expectations and managing ongoing performance. At a minimum, one documented progress review should be conducted between the employee and supervisor mid-cycle. The process is initiated by the supervisor who receives a task in Workday.

Manager Steps

1. Log into Workday and click on the **Manager Evaluation Classified Mid-Year Check** in task.
2. Read the help text then click **Get Started**.
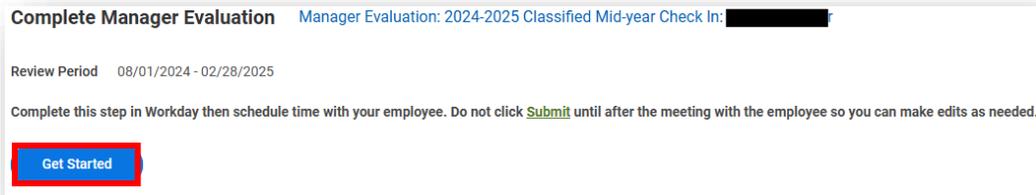
3. For the Mid-Year Check-in, most sections are not required.
   a. Click on the **Individual Performance Measures** section for goals.
      i. Click **Add.**
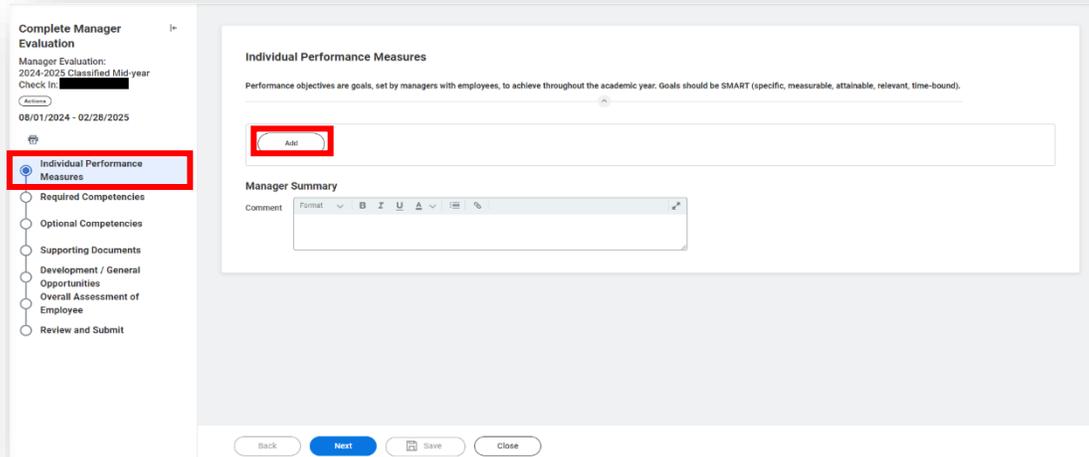
      ii. Click on the **Add Existing** drop down and select the relevant goals for the current year.
      iii. Click **Next**.
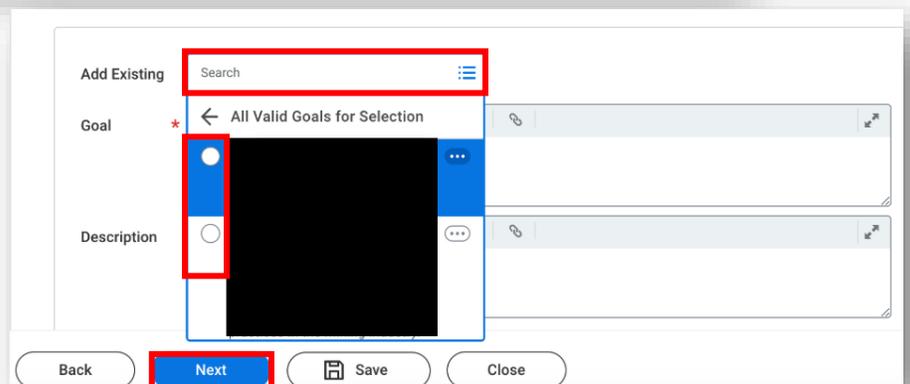
b. Click on **Overall Assessment of Employee** section on the left menu.
4. On the **Overall Assessment of Employee** screen, add **Comments** you want to share with the employee. Click **Next**.
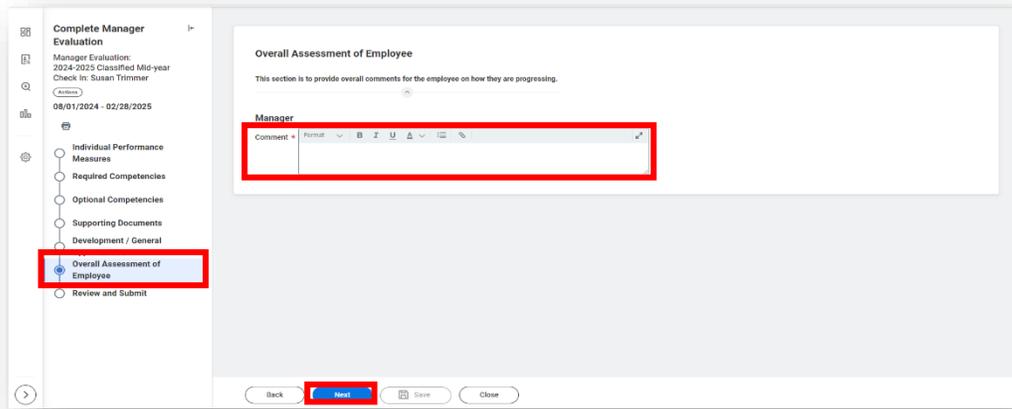
5. On the **Review and Submit** screen, **do not click submit** until you meet with the employee. If you click submit you will not be able to make any edits to your comments.
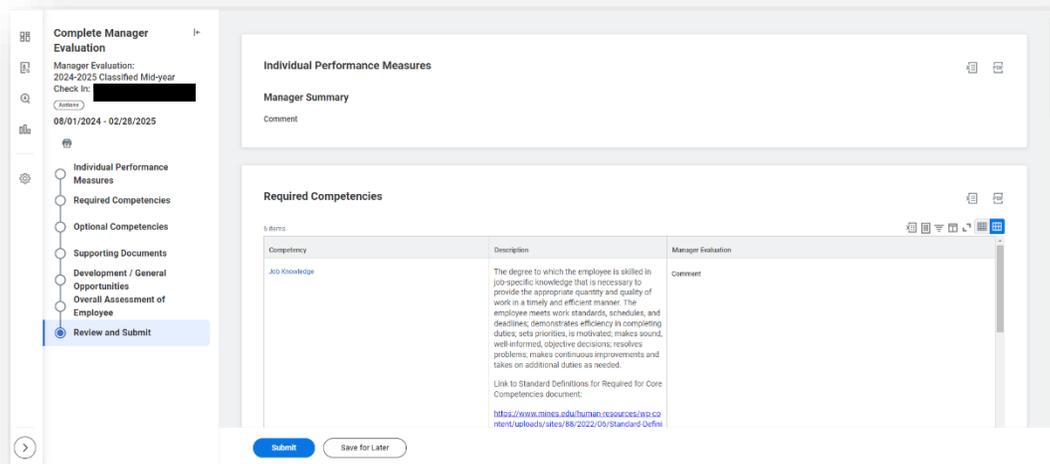
a. Once you meet with your employee, you can come back to the Workday task, click on **Review and Submit** then click on **Submit**.

Employee Steps

1. Log into Workday and click on the **Provide Employee Review Comments** task. Click on **Get Started**.
2. Select the **Acknowledgment** section on the left menu.
3. Click on the **Status** drop down menu and select **Acknowledge Review and Agree**. Add comments if you prefer.
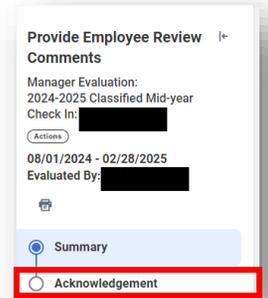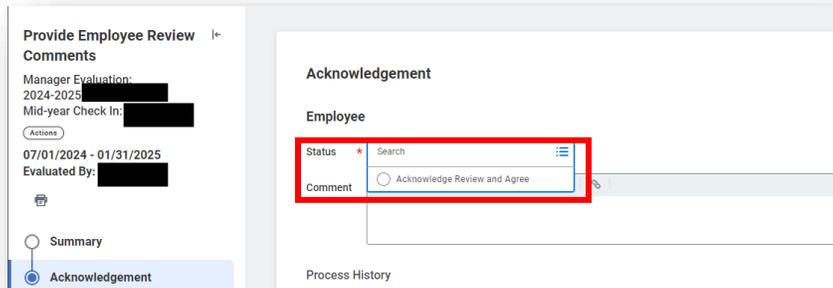
Manager Steps

1. Log into Workday and click on the **Manager Evaluation** task.
2. Click on **Get Started**.
3. Select the **Acknowledgment** section on the left menu.
4. Click on the **Status** drop down menu and select **Manager Review and Sign Off**. Add comments if you prefer.
5. Click **Submit**. This completes the process.