

Mid-Year Review - Manager

Overview

The Mid-Year Review is the basis for a performance conversation to review your employee's progress to date on his/her goals and the values framework that guides our decisions and behaviors.

Who Does This: Manager

Things to Know:

- This process occurs once per year. After the Mid-Year Review process is launched and your employee completes the Self Evaluation, you will receive an Inbox task to complete the Manager Evaluation.
- You are required to add comments for each Goal and Competency (not required in 2020) as well as overall comments.



Inbox
1 item

1

Manager Evaluation: Mid-Year Check-In 2020: Eric Employee
19 minute(s) ago - Effective 12/31/2020

Step 1

Choose the **Manager Evaluation Mid-Year** inbox task.

MANAGER INSTRUCTIONS:

The 2020 mid-year check-in is an opportunity to discuss your employee's performance up to this point in the year and to reassess goals if needed. This is also the time to discuss how our core values guide our daily communication, decision making, and behaviors. To begin the process, please click on "*Get Started*" below, and you will be guided through each section of the manager evaluation. You will have an opportunity to review the evaluation in its entirety before submitting.

For detailed instructions, refer to the Mid-Year Review job aid on the [Workday Help](#) page.

Get Started

2

Step 2

Read the instructions on the welcome page. Click on **Get Started** to proceed.

Complete Manager Evaluation

Manager Evaluation: Mid-Year Check-In 2020: Eric Employee

Actions

01/01/2020 - 12/31/2020

Goals and Objectives

Better Today, Better Together, B...

Overall

Review and Submit

The *Guided Experience* will take you through each section of your evaluation. The left side of your screen will highlight the section you are currently editing. You do have the capability to move between review sections by selecting it from the left side of your screen.

The screenshot shows a goal management interface with the following elements:

- Goal:** A text area for goal details with a blue '3' callout.
- Description:** A text area for goal description.
- Due Date:** A date picker set to 12/31/2020 with a blue '4' callout.
- Category:** A dropdown menu set to 'Quality' with a blue '5' callout.
- Status:** A dropdown menu set to 'On Schedule' with a blue '6' callout.
- Manager:** A text area for manager comments with a blue '8' callout.
- Employee:** A text area for employee comments with a blue '7' callout.

Step 3
Review the employee’s goal and description. Make any needed changes to the goal or description. Any changes made by you or the employee will be recorded in the History section of the goal. You can view changes by expanding the History section under the goal.

Step 4
Review the due date and update if needed.

Step 5
Review the category and update if needed.

Step 6
Review the employee’s status to indicate progress on the goal.

Step 7
Review your employee’s comment.

Step 8
Add comments on your employee’s progress towards the goal including achievements and challenges.

The screenshot shows a 'History' section with the following elements:

- History:** A section header with a blue '9' callout.
- Remove:** A button to delete a goal with a blue '10' callout.
- Next:** A button to move to the next section with a blue '11' callout.
- Save for Later:** An orange button.
- Close:** A grey button.

Step 9 (optional)
Expand the History section to see the details of any changes made to that goal

Step 10 (optional)
If the goal is no longer valid or is a duplicate of another goal, click **Remove** to delete this goal from the template.

Repeat steps 3 – 9 above to complete the evaluation for your employee’s remaining goals.

Step 11
Click **Next** to move to the next section.

Better Today, Better Together, Better Tomorrow

| Competency | Description | Manager Evaluation |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| The CoorsTek Way: Customer Obsession | We provide outstanding service for our customers, teammates, service communities, and more. We define leading edge solutions to improve the lives of people in the communities we serve. | Comment 12 |
| The CoorsTek Way: Collaboration | We collaborate to solve our customer's most complex challenges. We think globally and act locally. | Comment |
| The CoorsTek Way: Execution | We share responsibility, risk, opportunity and reward. We push the limits of what's possible. We make the most of our time and energy of every individual. | Comment |
| The CoorsTek Way: Innovation and Discovery | We act with consistency, honesty, and respect. We take pride in what we do. We expect to meet each goal with a long-term plan. | Comment |
| The CoorsTek Way: Customer Innovation | We are inspired by our legacy of innovation. We strive to meet the challenges of the future. | Comment |

Step 12
Review each competency and the associated values statements describing *The CoorsTek Way* we are expected to work.

Describe your employee’s related behaviors demonstrated including strengths and opportunities in the comments box for each competency.

Note: Comments optional for 2020

Manager Summary

Comment

Format ▼ **B** *I* U ▲ ▼ ☰ ↗

[14](#)

Employee Summary

Comment [13](#)

[Save for Later](#) [Back](#) [Next](#) [Close](#)

Step 13

Read the optional comments from your employee.

Step 14

Add an overall section comment regarding your employee's actions and behaviors around *The CoorsTek Way*.

Note: Comments optional for 2020

Step 15

Click **Next**.

Overall

MANAGER INSTRUCTIONS:

The fundamental goal of performance management is to promote and improve employee effectiveness. Please review your employee's overall comment and add your required comment about your employee's overall performance thus far this year.

After adding your required comment, you can click "Next" to proceed to final review section. You will have the opportunity to review the employee's entire evaluation prior to submitting. You can also click "Save for Later" and this task will remain in your inbox until you are ready to take further action.

Manager

Comment *

Format ▼ **B** *I* U ▲ ▼ ☰ ↗

[17](#)

Employee

Comment test [16](#)

[Save for Later](#) [Back](#) [Next](#) [Close](#)

Step 16

Read your employee's overall comment regarding performance to date.

Step 17

Add your required overall comment about your employee's performance year to date.

Step 18

Click **Next**.

[19](#)

Complete Manager Evaluation

Manager Evaluation: Mid-Year Check-In 2020: Eric Employee

[Actions](#)

01/01/2020 - 12/31/2020

- Goals and Objectives
- Better Today, Better Together, B...
- Overall
- Review and Submit

[20](#)

[Submit](#) [Send Back](#) [Save for Later](#)

Step 19

Review your employee's Mid-Year Evaluation to ensure you are satisfied with your entries.

Step 20

Click **Submit**.

Success! Event submitted
Manager Evaluation: Mid-Year Check-In 2020: Eric Employee [Actions](#)

Up Next

Report: Performance Review Printout

21

Done

Step 21

Click **Done**.



Inbox
1 item

22

Performance Discussion: Manager Evaluation: Mid-Year Check-...
10 minute(s) ago - Effective 12/31/2020

Step 22

After you click **Done** in the prior step, you will receive a new Inbox task **Performance Discussion: Manager Evaluation**. Choose this Inbox task to continue.

Complete To Do

Performance Discussion [Actions](#)

3 minute(s) ago - Effective 12/31/2020

For **Eric Employee**

Overall Process **Mid-Year Check-In 2020: Eric Employee**

Overall Status **In Progress**

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Instructions

It is critical that you follow these steps in the order prescribed. Hold your performance discussion before hitting submit.
Step 1. Please have a conversation with your employee about his/her performance. It is possible to provide a pdf version of the evaluation for discussion.
Step 2. Click Submit.

NOTE: Once you Submit, the employee will have access to the full review in Workday.

1 item

| File Name | Type |
|----------------------------------------------------------------|---------------------|
| Performance Review Printout 2020-05-20_12_19 CDT.pdf | Business Form (PDF) |

24

Submit

25

Save for Later

Close

Step 23

Follow the instructions in the To Do item and have a performance discussion with your employee.

Step 24

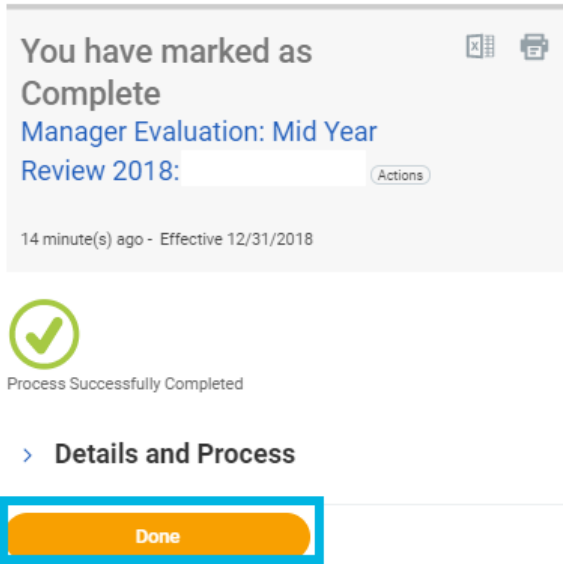
Click on the PDF file within the To Do item to open a printable version of the Mid-Year Review.

Print the Mid-Year Review and provide a copy to your employee during your performance discussion.

Step 25

After your conversation with your employee, click **Submit**.

After you click Submit, your employee will be able to access the full review in the Talent and Performance Worklet.

| | |
|-----------------------------------------------------------------------------------|----------------------------------------------|
|  | <p>Step 26 Click Done.</p> |
|-----------------------------------------------------------------------------------|----------------------------------------------|

FAQ's

What happens next? The process is complete.


Who can see the Mid-Year Review? The Mid-Year Review is visible by your employee, his/her management chain, and HR.

Why are there no ratings in the Mid-Year Review? The Mid-Year Review is the catalyst for a conversation between you and your employee to acknowledge accomplishments, assess progress to date, discuss adjustments needed, and identify remaining priorities. Ratings only occur during the Annual Review process.

Where can I see the completed Mid-Year Review? The Mid-Year Review is visible to you in the Team Performance worklet and on your employee's Profile in the Performance Profile Group.

Will I complete a Mid-Year Review for an employee hired this year? All employees hired prior to April 15 will have a Mid-Year Review.

Where can I track the status of Mid-Year Reviews in my organization? Performance review status reports can be found in the Team Performance Worklet. Under the "My Team's Performance" heading, there are several report options to see review details for your organization.

-  My Team's Performance
 - My Team's Performance Reviews >
 - My Organization's Reviews with Status >
 - View Printable Employee Review >
 - Employee Review Status Summary >