Employee Guide: Mid-Year Check In
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Overview

The Mid-Year Check In phase of the Annual Performance Evaluation is an opportunity for managers and employees to meet for the purpose of reviewing goals that were previously set. During this time, you should add notes about progress made towards the goals. You may also adjust, add or delete goals at this time. Once this phase is complete, the goals will be finalized and no longer be editable.

Below are some tips on how to manage your performance evaluation throughout the year:

- Once the Mid-Year Check In is finalized and the evaluation is open, employees and managers can begin entering information into the system including adding comments and attachments.
- Add your goals as a topic for when you have one-on-one employee/manager meetings.
- Post your goals in a place that you can reference regularly to ensure you stay on track.
Step 1 of 7 – Employee Self-Service
Select the **Employee Self Service** option on the PeopleSoft homepage.

Step 2 of 7 – Performance Tile
Select the **Performance** tile.

Step 3 of 7 – Current Documents
The performance documents will appear under **My Current Documents**.
Select **UTSA Performance Evaluation**.
Step 4 of 7 – Document progress toward your goals.

Select **Update and Share**. Read the instructions that appear on the screen.

**Important:** Your comments are private and therefore not visible to your manager until you choose to share them.

Selecting **Expand** will allow you to view your goals and **add comments about your progress in the Employee Comments field.**

**Note:** Your manager’s comments will be visible once they share them with you.
As you are entering your comments, make sure to **SAVE** often. You can use the tools available on the toolbar. To check for misspelled words, select this icon: ![Spell Check]

**Note:** Your comments are not shared with your manager until you share them.

**Step 5 of 7 – Share with Manager**

To ensure your manager can read your comments, click **Share with Manager**.
A pop-up window will appear on the screen. Select **Confirm**.

The screen shown below will appear to confirm that your comments have been shared with your manager.
Step 6 of 7 - Meet with Manager to Review Progress

Your manager will arrange a 1:1 meeting to review your performance and progress toward your goals. **During the meeting**, your manager may make adjustments to your goals by:

- Adding a goal
- Editing a goal
- Deleting a goal
- Adding to the Manager Comments

**After the meeting**, you may enter additional comments in the **Employee Comments** field. Remember that your comments are shared with your manager. If you add and save additional comments, your manager will be able to view them.

![Performance Process](image)
Step 7 of 7 – Finalize Mid-Year and Open Evaluation

Once you and your manager have had the opportunity to view all comments in the Goals Mid-Year Check In task, your manager will **Finalize the Mid-Year and Open Evaluation**.

**NOTE:** After your manager has finalized the Mid-Year and opened the evaluation, you may begin adding attachments and comments about goal progress and performance to prepare for the final steps of the evaluation process.