

UTSA People Excellence

Employee Guide:
**Mid-Year
Check In**

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Overview

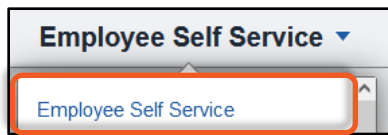
The Mid-Year Check In phase of the Annual Performance Evaluation is an opportunity for managers and employees to meet for the purpose of reviewing goals that were previously set. During this time, you should add notes about progress made towards the goals. You may also adjust, add or delete goals at 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.

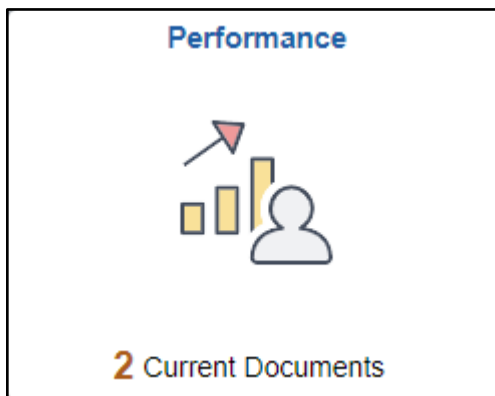
Step 1 of 7 – Employee Self-Service

Select the **Employee Self Service** option on the PeopleSoft homepage.



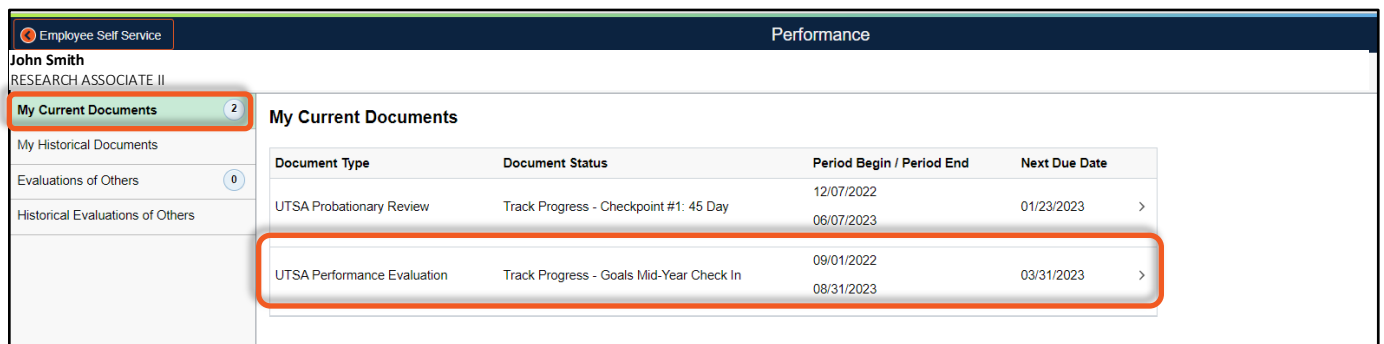
Step 2 of 7 – Performance Tile

Select the **Performance** tile.



Step 3 of 7 – Current Documents

The performance documents will appear under **My Current Documents**.
Select **UTSA Performance Evaluation**.

A screenshot of the PeopleSoft Performance page. The top navigation bar shows "Employee Self Service" and "Performance". Below the navigation bar, the user's name "John Smith" and title "RESEARCH ASSOCIATE II" are displayed. On the left side, there is a sidebar menu with "My Current Documents" (2) highlighted with a red box. The main content area is titled "My Current Documents" and contains a table with the following data:

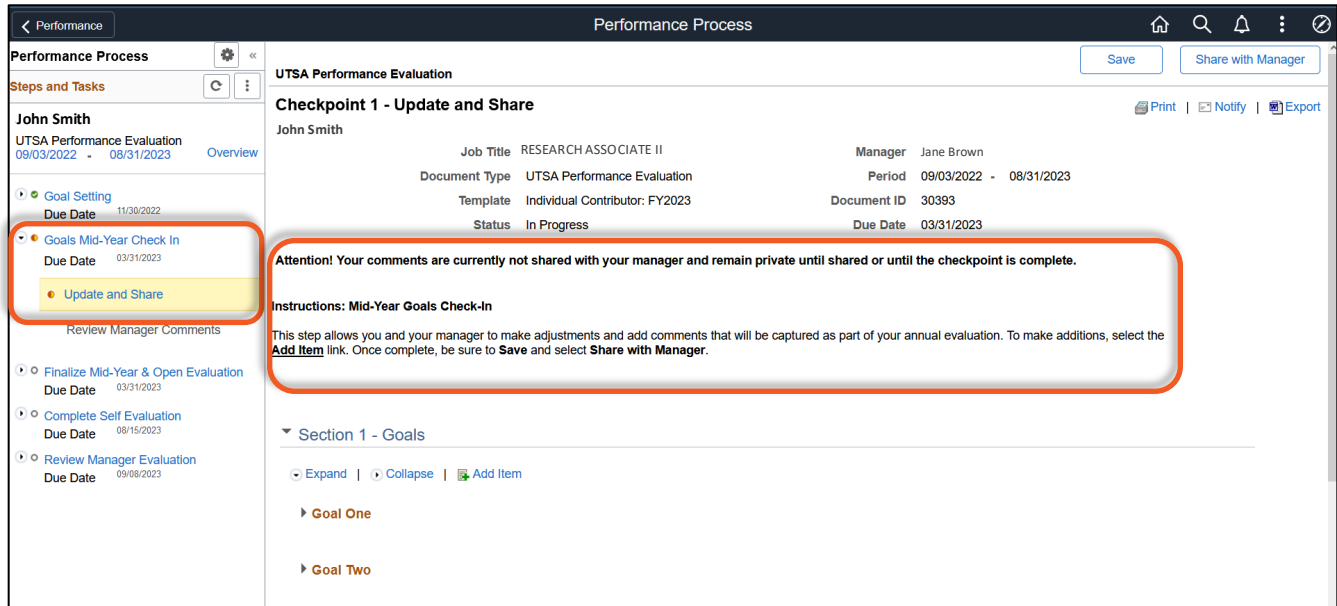
Document Type	Document Status	Period Begin / Period End	Next Due Date	
UTSA Probationary Review	Track Progress - Checkpoint #1: 45 Day	12/07/2022 06/07/2023	01/23/2023	>
UTSA Performance Evaluation	Track Progress - Goals Mid-Year Check In	09/01/2022 08/31/2023	03/31/2023	>

The second row of the table is highlighted with a red rectangular border.

Step 4 of 7 – Document progress toward your goals.

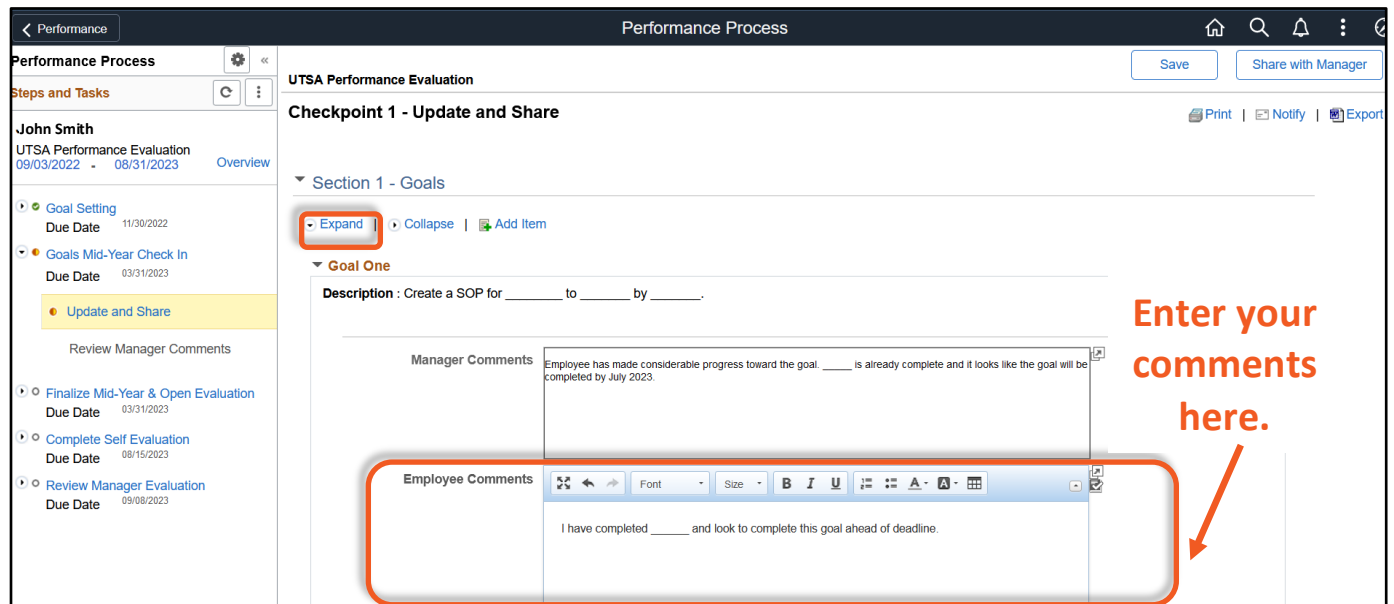
Select **Update and Share**. Read the instructions that appear on the screen.

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.**

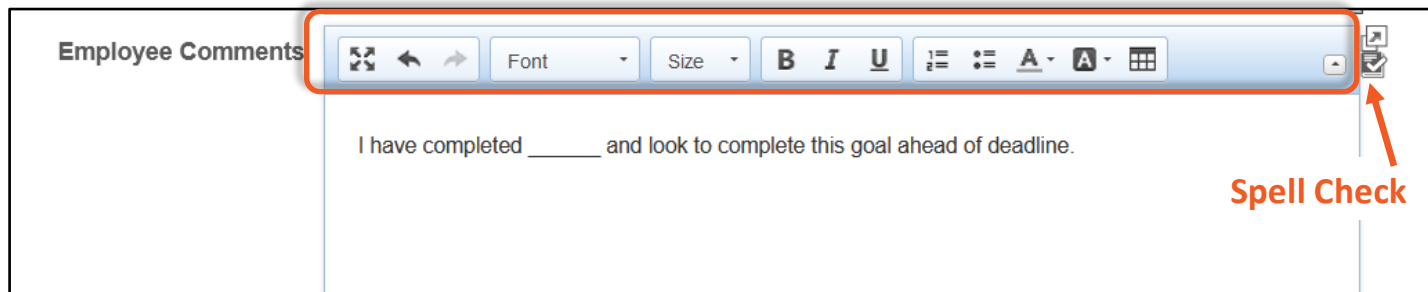
Note: Your manager's comments will be visible once they share them with you.



As you are entering your comments, make sure to **SAVE** often.

You can use the tools available on the toolbar.

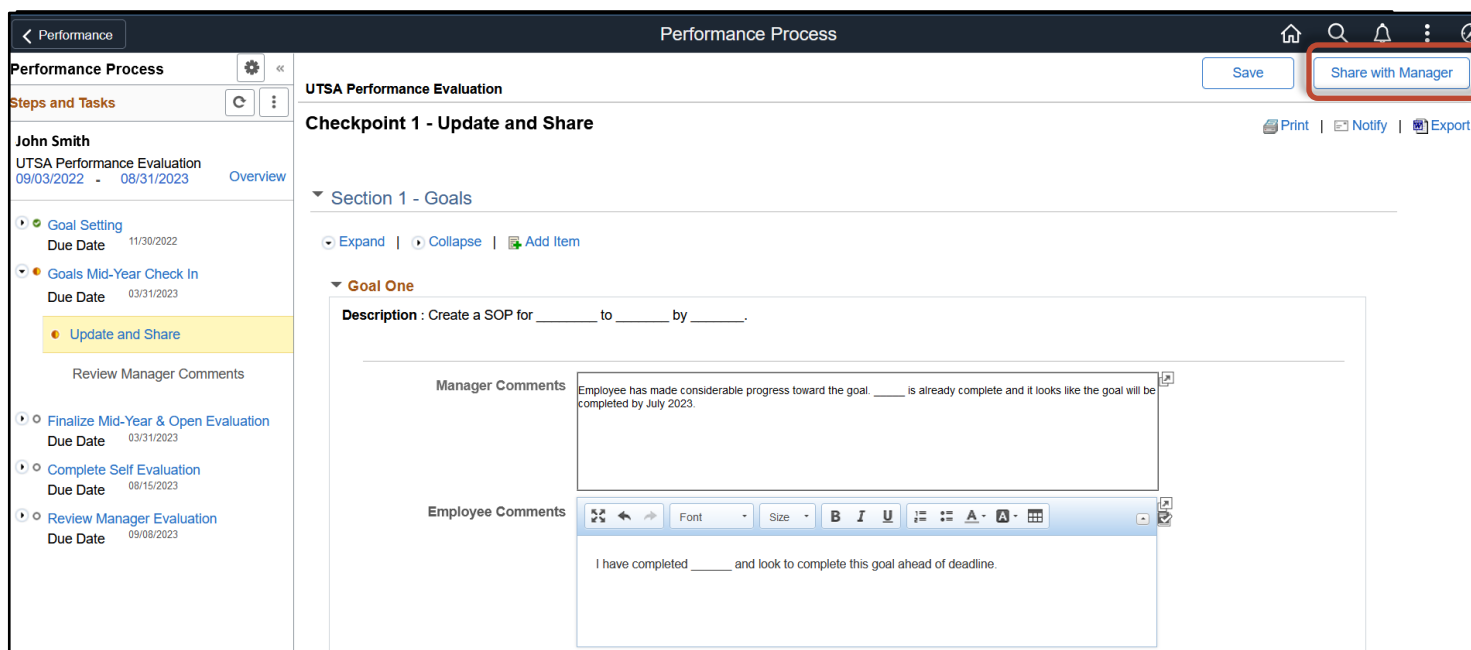
To check for misspelled words, select this icon: 



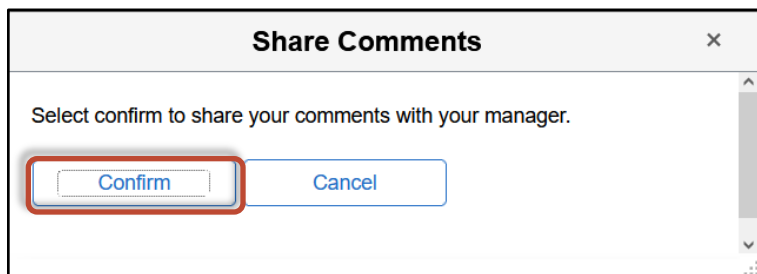
Note: Your comments are not shared with your manager until you share them.

Step 5 of 7 – Share with Manager

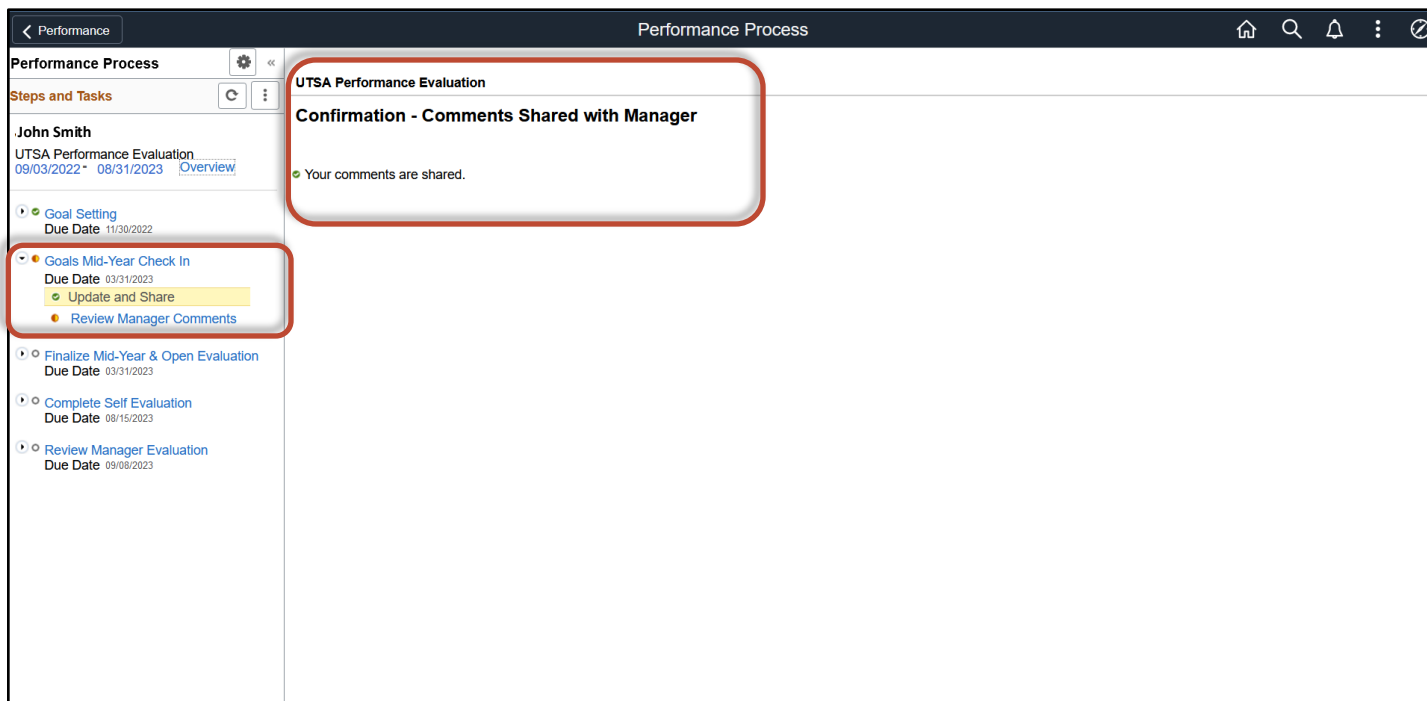
To ensure your manager can read your comments, click **Share with Manager**.



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.

The screenshot displays the 'Performance Process' interface for 'UTSA Performance Evaluation'. The left sidebar shows a 'Steps and Tasks' list with 'Review Manager Comments' highlighted. The main content area is titled 'Checkpoint 1 - Review Manager Comments' and includes a table with employee and document details. A red-bordered warning box is overlaid on the page, stating: 'Attention! Your comments are shared with your manager. If additional comments saved, your manager will be able to view until the checkpoint is complete or you choose to STOP SHARING.' Below this, there are instructions for the 'Mid-Year Goals Check-In' step and a section for 'Section 1 - Goals' with a 'Goal One' description: 'Create a SOP for _____ to _____ by _____.' At the bottom, a 'Manager Comments' field contains the text: 'Employee has made considerable progress toward the goal. _____ is already complete and it looks like the goal will be completed by July 2023.'

Job Title	RESEARCH ASSOCIATE II	Manager	Jane Brown
Document Type	UTSA Performance Evaluation	Period	09/03/2022 - 08/31/2023
Template	Individual Contributor: FY2023	Document ID	30393
Status	In Progress	Due Date	03/31/2023

Attention! Your comments are shared with your manager. If additional comments saved, your manager will be able to view until the checkpoint is complete or you choose to STOP SHARING.

Instructions: Mid-Year Goals Check-In

This step allows you and your manager to make adjustments and add comments that will be captured as part of your annual evaluation. To make additions, select the **Add Item** link. Once complete, be sure to **Save** and select **Share with Manager**.

Section 1 - Goals

Expand | Collapse | Add Item

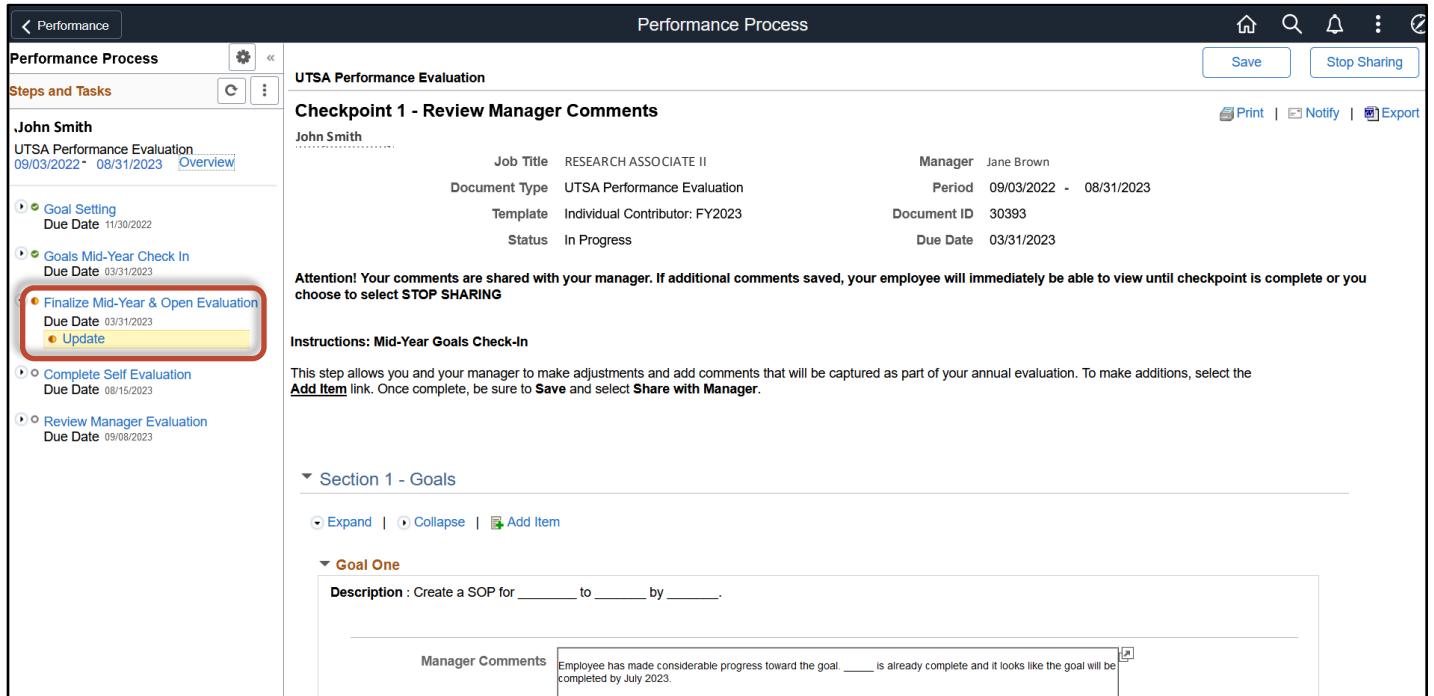
Goal One

Description : Create a SOP for _____ to _____ by _____.

Manager Comments Employee has made considerable progress toward the goal. _____ is already complete and it looks like the goal will be completed by July 2023.

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.