

**UTSA** People Excellence

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

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## Overview

The Mid-Year Check-In phase 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.

Frequent one-on-one employee meetings are encouraged as they allow managers and employees to routinely check in with one another about progress towards goals. These meetings provide opportunities to clarify expectations, ensure alignment, and ask questions. Below are some quick tips on how to keep the **Performance Management** process ongoing.

- Schedule reoccurring one-on-one employee meetings to include goals as one of the ongoing topics.
- Keep employee goals in a place you can reference often. This allows you to connect the work they are doing to achieve their goals.
- Celebrate milestones of goal attainment and performance highlights during individual and team meetings.

Scheduling time with your employee(s) throughout the year to discuss performance and progress toward goals creates an opportunity to support, celebrate and connect.

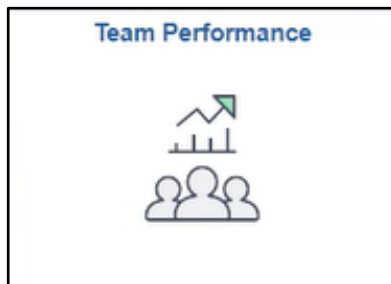
## Step 1 of 12 – Manager Self-Service

Select the **Manager Self-Service** option from the drop-down menu on the PeopleSoft homepage.



## Step 2 of 12 – Team Performance Tile

Select the **Team Performance** tile.



## Step 3 of 12 – Current Documents

A list of available **Current Documents** will appear. Select an employee to continue.

The screenshot shows the "Manager Self Service" interface. On the left is a navigation menu with "Current Documents" selected. The main area is titled "Team Performance" and "Current Documents". It contains a table with the following data:

Name / Job Title	Document Type	Document Status
<b>John Smith</b> RESEARCH ASSOCIATE II	UTSA Performance Evaluation	Track Progress - Goals Mid-Year Check In
<b>Justin Kling</b> OFF-MANAGEMENTIVE ASSOCIATE	UTSA Performance Evaluation	Online - Online
<b>Jason Collins</b> RECEPTION SPECIALIST	UTSA Performance Evaluation	Online - Online
<b>Jason Collins</b> RECEPTION SPECIALIST	UTSA Probationary Review	Approval - Approval

The first row, corresponding to John Smith, is highlighted with a red oval.

## Step 4 of 12 – Verify

Verify employee information.

Performance Process

UTSA Performance Evaluation

John Smith

Goals Mid-Year Check In - Update and Share

Job Title	RESEARCH ASSOCIATE II	Manager	Jane Brown
Document Type	UTSA Performance Evaluation	Period	09/29/2022 - 08/29/2023
Template	Individual Contributor: FY2023	Document ID	28737
Status	In Progress	Due Date	03/31/2023

Attention! Your comments are currently not shared with your employee and remain private.

Instructions: Mid-Year Goals Check-In

At this time, you should be holding a review session with your employee to share feedback about their progress. During this step, you can make additions and/or adjustments as well as provide comments that will be captured as a part of the annual evaluation. As you make updates, please be sure to **Save** your work. Once the meeting has occurred, be sure to click **Share with Employee**. Click **Review with Employee** from the **left side task list** and then click **Complete Checkpoint** to finalize this step. Completing this step will move the process to the **Open Evaluation** task.

Selecting **Next Checkpoint** will mark this step as skipped.

Section 1 - Goals

- Expand | Collapse | Add Item
- Goal 1

## Step 5 of 12 – Check for Goals Submission

The employee's goals should have been submitted. This is indicated by a green checkmark icon next to goal setting.

Performance Process

UTSA Performance Evaluation

Lynda Ozuna

Goals Mid-Year Check In - Update and Share

Job Title	RETENTION SPECIALIST	Manager	Jacquez Smiley
Document Type	UTSA Performance Evaluation	Period	09/29/2022 - 08/29/2023
Template	Individual Contributor: FY2023	Document ID	28737
Status	In Progress	Due Date	03/31/2023

Attention! Your comments are currently not shared with your employee and remain private.

Instructions: Mid-Year Goals Check-In

At this time, you should be holding a review session with your employee to share feedback about their progress. During this step, you can make additions and/or adjustments as well as provide comments that will be captured as a part of the annual evaluation. As you make updates, please be sure to **Save** your work. Once the meeting has occurred, be sure to click **Share with Employee**. Click **Review with Employee** from the **left side task list** and then click **Complete Checkpoint** to finalize this step. Completing this step will move the process to the **Open Evaluation** task.

Selecting **Next Checkpoint** will mark this step as skipped.

Section 1 - Goals

- Expand | Collapse | Add Item
- Goal 1

If **Goal Setting** has been completed, you may continue to Step 6.

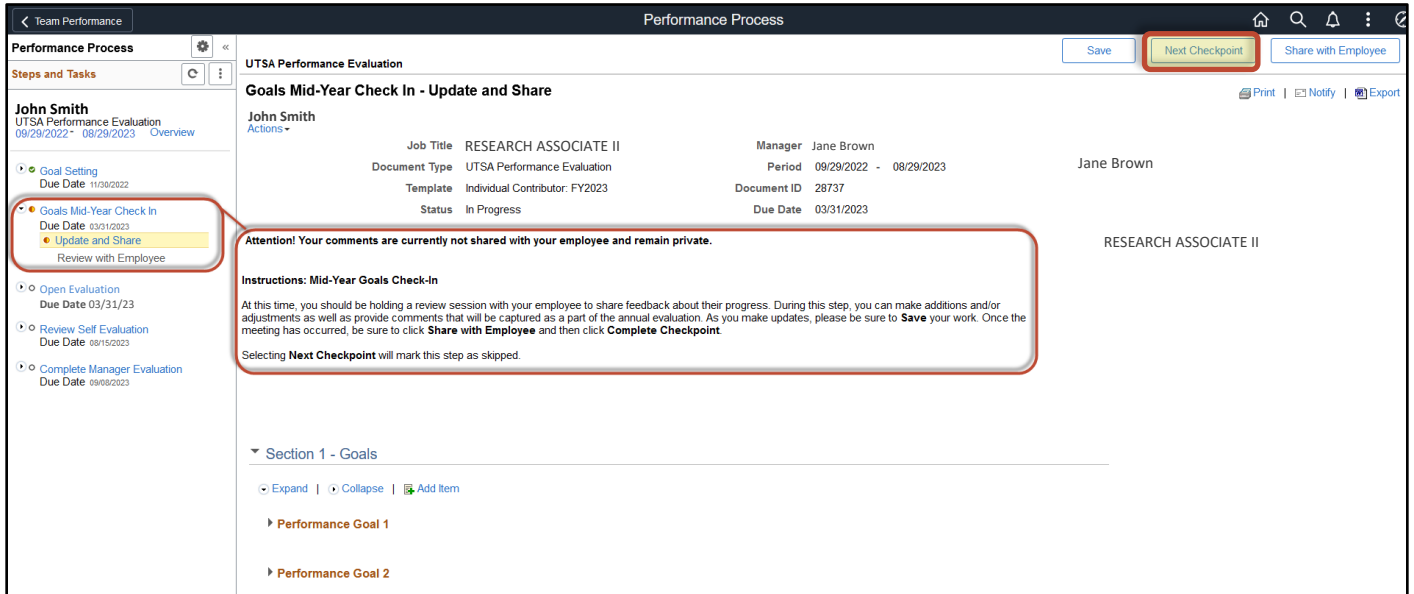
If **Goal Setting** has not been completed, complete this step before moving on to Step 6.

## Step 6 of 12 –Review Goals and Enter Manager Comments

Select **Update and Share**.

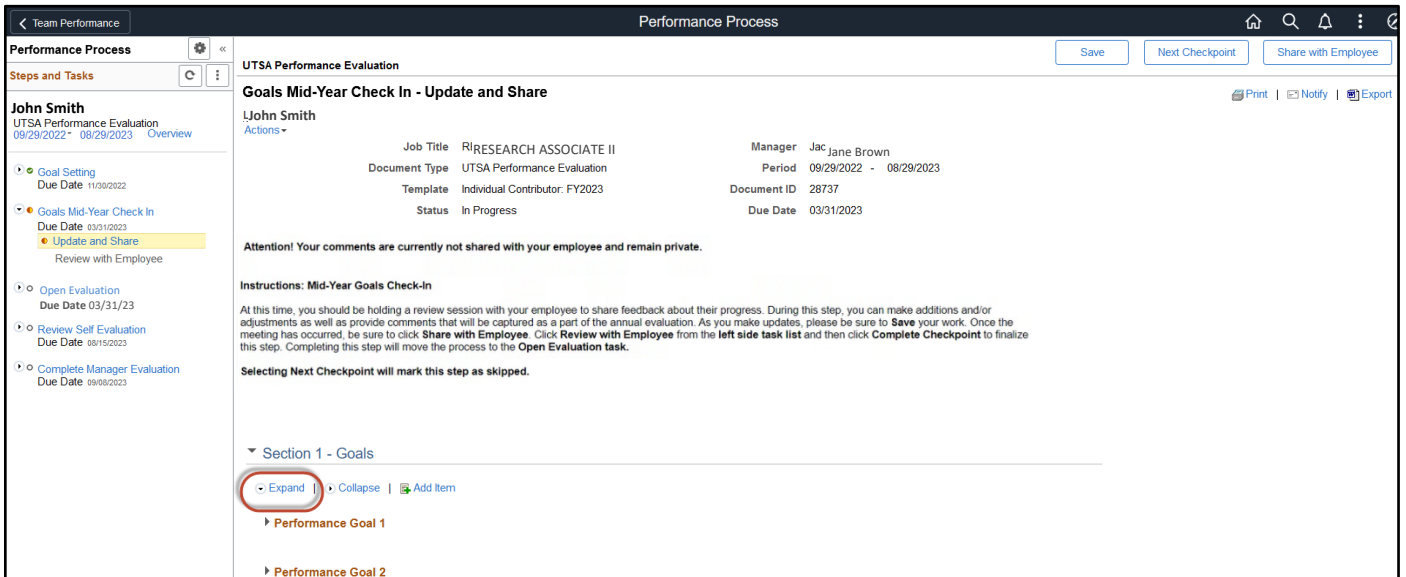
Read the directions on the screen.

**Avoid selecting “Next Checkpoint” as it will skip this important part of the evaluation process. If you select “Next Checkpoint” by mistake, you can reopen the checkpoint by selecting **Reopen**. [Click here for further instructions.](#)**




**Before you meet with your employee, review their goals and enter your comments.**

Scroll down to Section 1 – Goals. Select **Expand**.



Selecting **Expand** allows you to view and add your comments to each of the employee's goals. You can type in your comments in the **Manager's Comments** field.

The screenshot shows the 'Performance Process' interface for 'John Smith'. The current step is 'Goals Mid-Year Check In - Update and Share'. A 'Save' button is highlighted in the top right. The main content area shows a goal description: 'I will develop an SOP for \_\_\_ that \_\_\_ by \_\_\_'. Below this is a 'Manager Comments' text area with a rich text toolbar. An arrow points to the goal description with the label 'Employee's Goal'. Another arrow points to the 'Manager Comments' text area with the label 'Enter your comments here.'

As you enter your comments, make sure to **SAVE** often. You can use the tools available on the toolbar. To check for misspelled words, select this icon: 

This close-up shows the 'Manager Comments' toolbar. It includes icons for undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, text color, background color, and a spell check icon. The spell check icon is highlighted with a red arrow and the label 'Spell Check'.

## Step 7 of 12 – Schedule a One-on-One Review Session with Your Employee

**IMPORTANT:** Once you have entered your comments, schedule a one-on-one mid-year review session with your employee to share feedback about their progress.

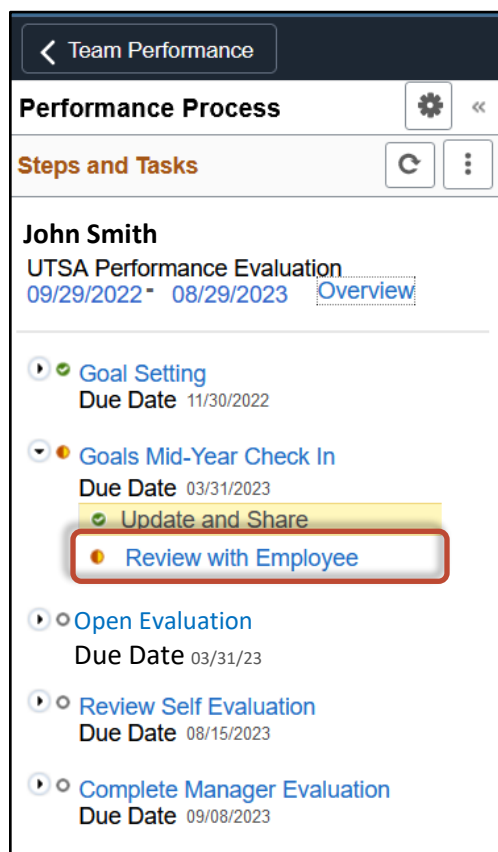
## Step 8 of 12 – Meet with Your Employee

During this step, you can make additions and/or adjustments, as well as provide comments that will be captured as a part of the annual evaluation. PeopleSoft allows you to:

- Add a goal
- Edit a goal
- Delete a goal
- Add to your comments

As you make updates, please be sure to **SAVE** your work.

You will find directions on how to complete all of the actions listed above on the next few pages.





The screen below will appear. Read the instructions on the screen.

The screenshot displays the 'Performance Process' interface for a 'UTSA Performance Evaluation'. The left sidebar shows a 'Steps and Tasks' list for 'John Smith', with 'Review with Employee' highlighted. The main content area shows 'Checkpoint 1 - Review with Employee' for 'John Smith', with details for Job Title (RESEARCH ASSOCIATE II), Manager (Jane Brown), and Document Type (UTSA Performance Evaluation). A large red-bordered box contains the following text:

**Attention! Your comments are currently not shared with your employee and remain private.**

**Instructions: Mid-Year Goals Check-In**

At this time, you should be holding a review session with your employee to share feedback about their progress. During this step, you can make additions and/or adjustments as well as provide comments that will be captured as a part of the annual evaluation. As you make updates, please be sure to **Save** your work. Once the meeting has occurred, be sure to click **Share with Employee**. Click **Review with Employee** from the **left side task list** and then click **Complete Checkpoint** to finalize this step. Completing this step will move the process to the **Open Evaluation** task.

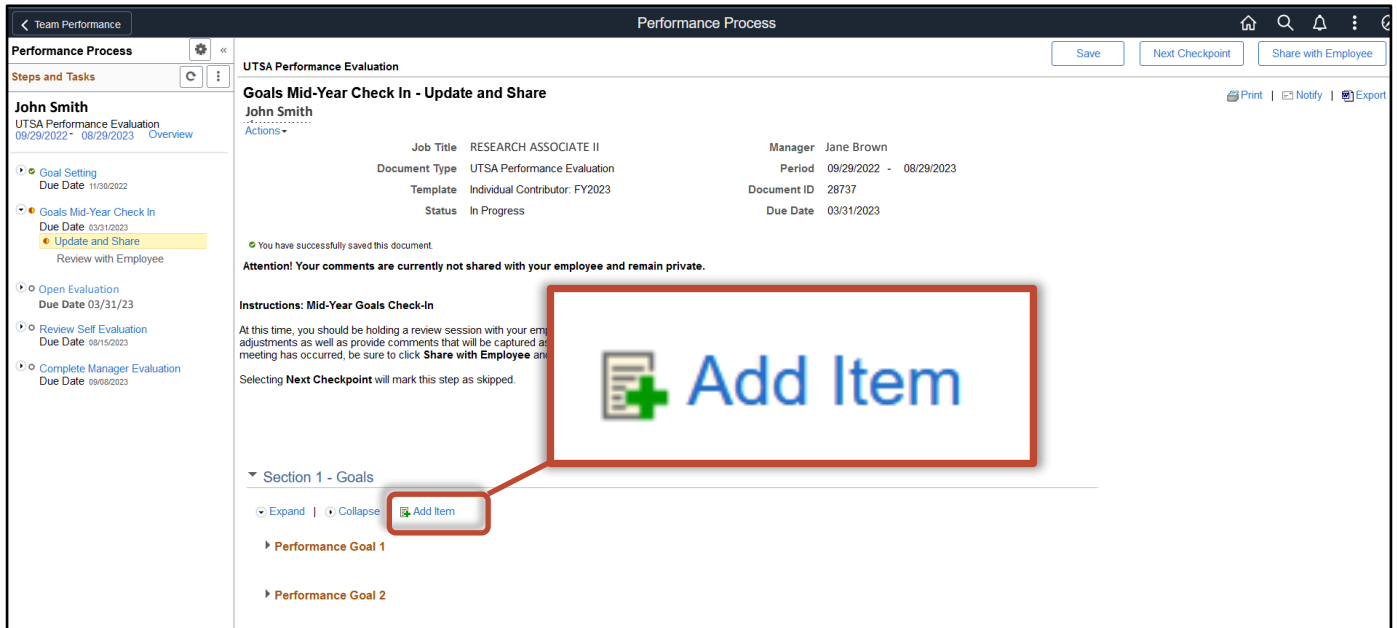
Selecting **Next Checkpoint** will mark this step as **skipped**.

The top navigation bar includes buttons for 'Save', 'Next Checkpoint', 'Stop Sharing', and 'Complete Checkpoint'. Below the screenshot, a red-bordered box highlights these buttons and the 'Print | Notify | Export' links.

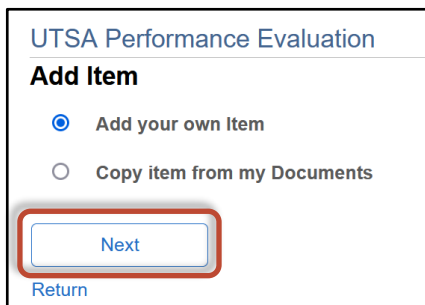
## Buttons and Widgets Explanation

- **Save** will save your work.
- **Complete Checkpoint** should not be selected until Step 11, after you have met with your employee and allowed them to comment.
- **Next Checkpoint** will mark this step as skipped.
- **Stop Sharing** will make it so that your comments are not shared with your employee.
- **Print** will create a PDF of your evaluation.
- **Notify** will open a pop-up box that allows you to send an email to your employee.
- **Export** will create an editable Word document of the evaluation.

To add a goal, select **add item**.

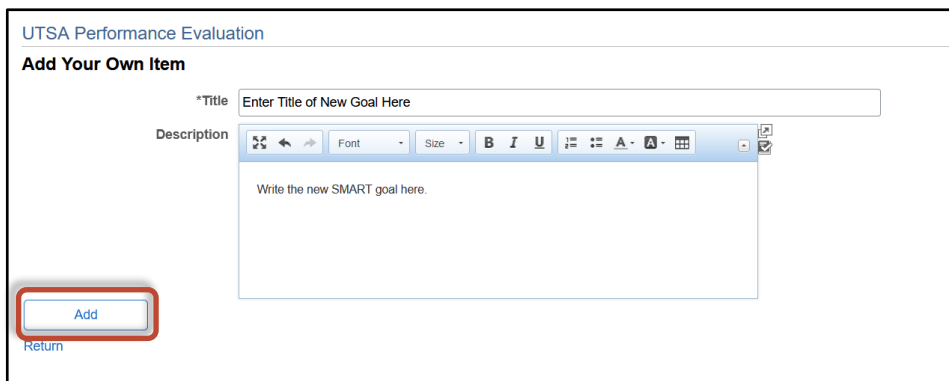



The screen shown below will appear. Select **Add your own Item**, then select **Next**.

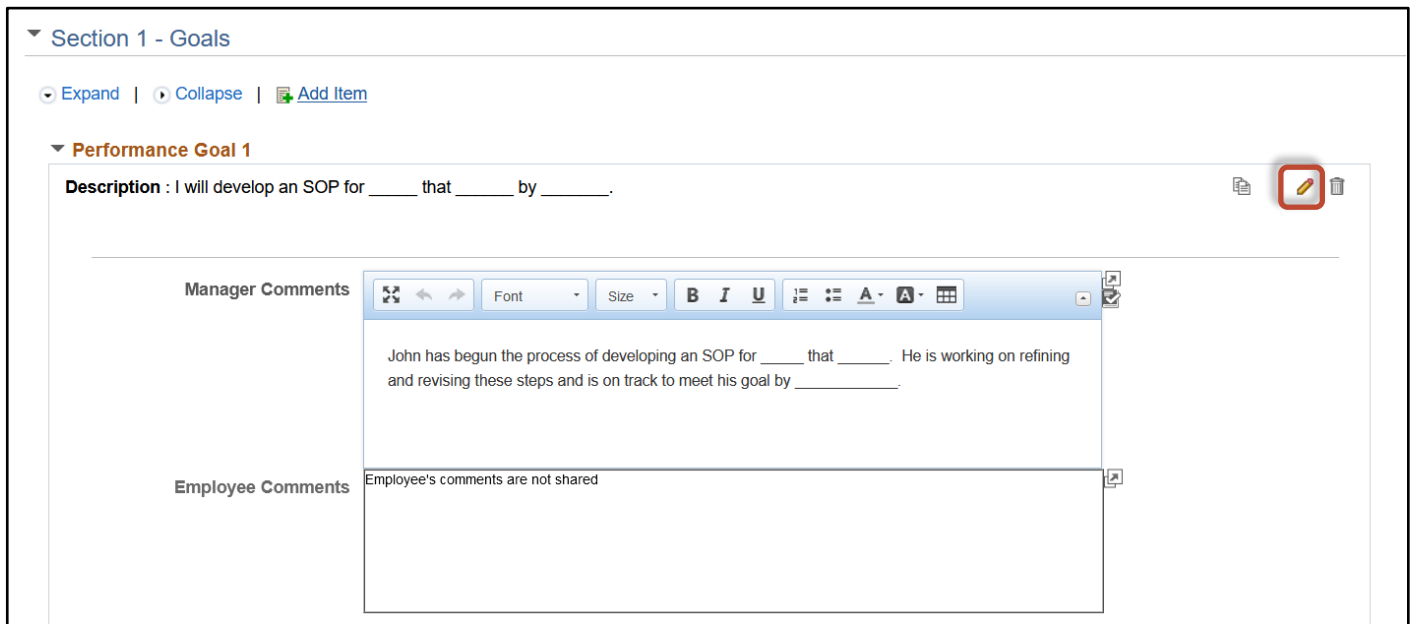


*TIP: If you select Add Item by mistake, selecting Return will take you back to the previous screen.*

A new screen will appear. Type the title of your new goal in the **Title** field, and type the new SMART goal in the **Description** field. Then, select **Add**. This will take you back to the main screen and you will see that the new goal has been added.

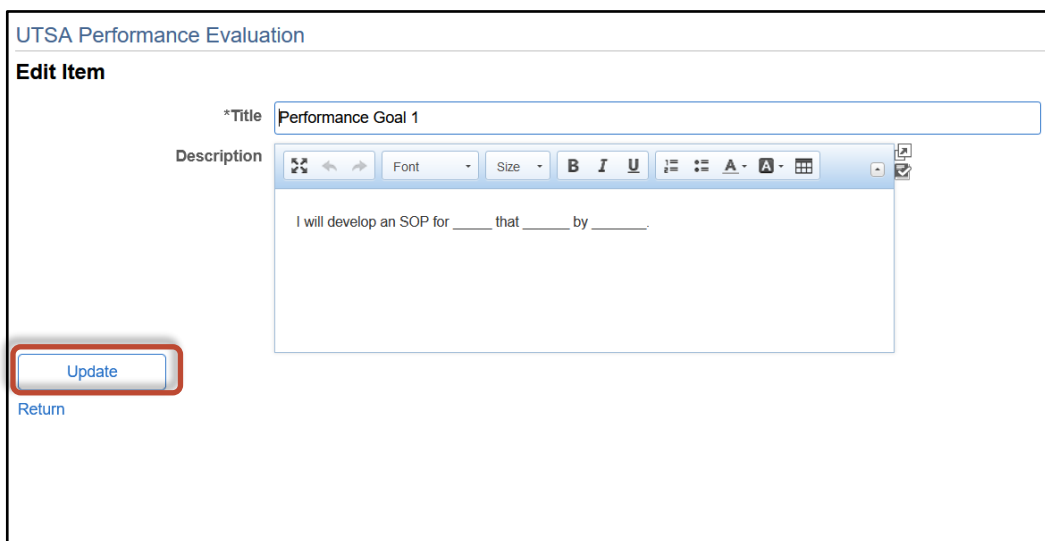


To edit a goal, select the pencil icon: 



The screenshot shows a web interface for editing a performance goal. At the top, there is a section header "Section 1 - Goals" with sub-options "Expand", "Collapse", and "Add Item". Below this is a "Performance Goal 1" section. The "Description" field contains the text: "I will develop an SOP for \_\_\_\_ that \_\_\_\_ by \_\_\_\_." To the right of the description are icons for copy, edit (pencil), and delete. Below the description is a "Manager Comments" section with a rich text editor containing the text: "John has begun the process of developing an SOP for \_\_\_\_ that \_\_\_\_\_. He is working on refining and revising these steps and is on track to meet his goal by \_\_\_\_\_." Below that is an "Employee Comments" section with the text: "Employee's comments are not shared".

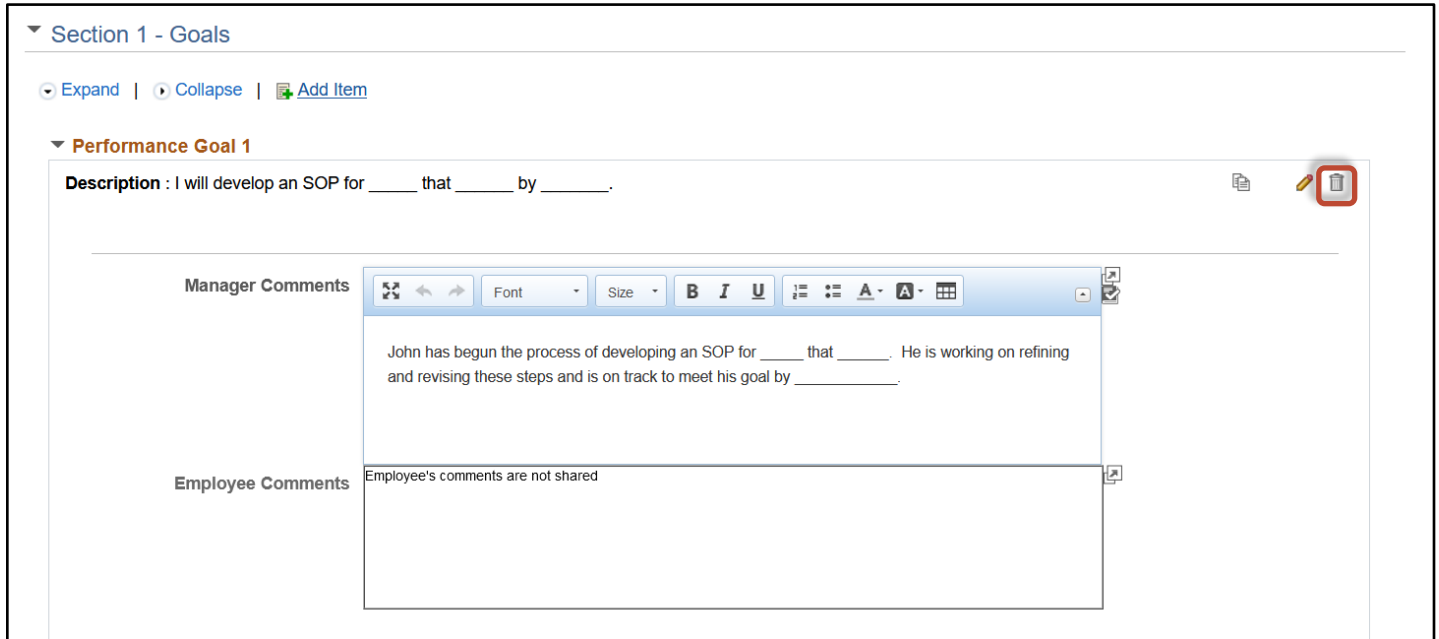
The screen shown below will appear. Edit the title and/or description of the goal, then select **Update**.



The screenshot shows the "UTSA Performance Evaluation" "Edit Item" form. It has a "\*Title" field with the text "Performance Goal 1" and a "Description" field with the text "I will develop an SOP for \_\_\_\_ that \_\_\_\_ by \_\_\_\_." Below the description field is a rich text editor. At the bottom left, there is a blue "Update" button with a red border, and a "Return" link below it.

This will take you back to the main screen where you will see that the new goal has been edited.

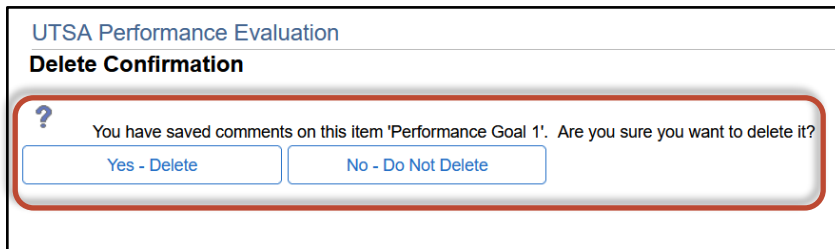
To delete a goal, select the delete icon: 



The screenshot displays the 'Section 1 - Goals' interface. Under 'Performance Goal 1', the description is 'I will develop an SOP for \_\_\_\_ that \_\_\_\_ by \_\_\_\_'. A red box highlights the delete icon in the top right corner. Below the description are two comment sections: 'Manager Comments' with a rich text editor containing the text 'John has begun the process of developing an SOP for \_\_\_\_ that \_\_\_\_ . He is working on refining and revising these steps and is on track to meet his goal by \_\_\_\_ .', and 'Employee Comments' which currently shows 'Employee's comments are not shared'.

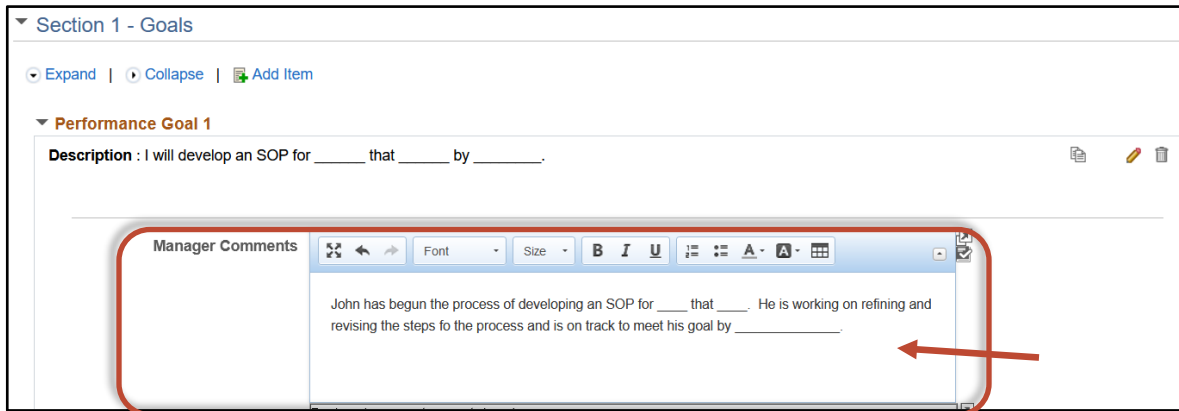
The screen shown below will appear. Selecting “No-Do Not Delete” will take you back to the main screen. Selecting “Yes-Delete” will delete the goal and take you back to the main screen.

**Note:** You will not be able to retrieve the goal once it is deleted.



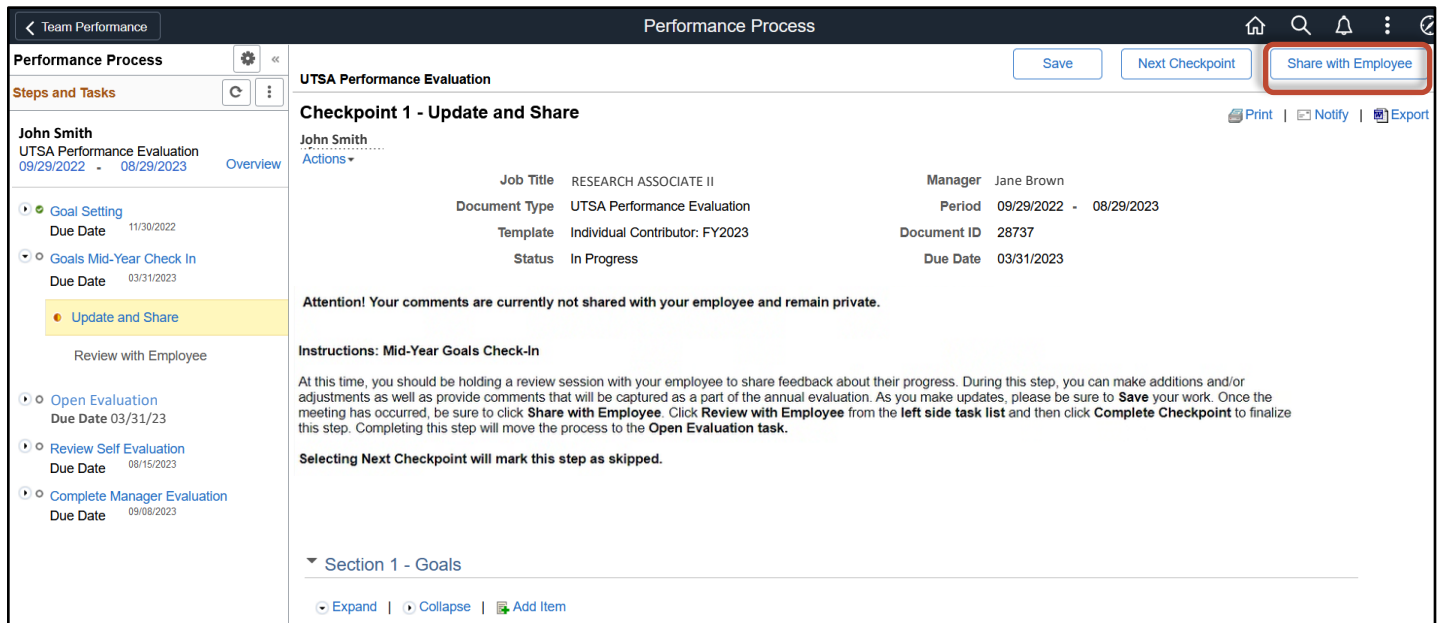
The screenshot shows a 'Delete Confirmation' dialog box with the title 'UTSA Performance Evaluation'. The message reads: '? You have saved comments on this item 'Performance Goal 1'. Are you sure you want to delete it?'. There are two buttons: 'Yes - Delete' and 'No - Do Not Delete'. A red box highlights the entire dialog box.

To add to or edit your comments, place your cursor in the **Manager Comments field** and make changes. Be sure to **SAVE** often.

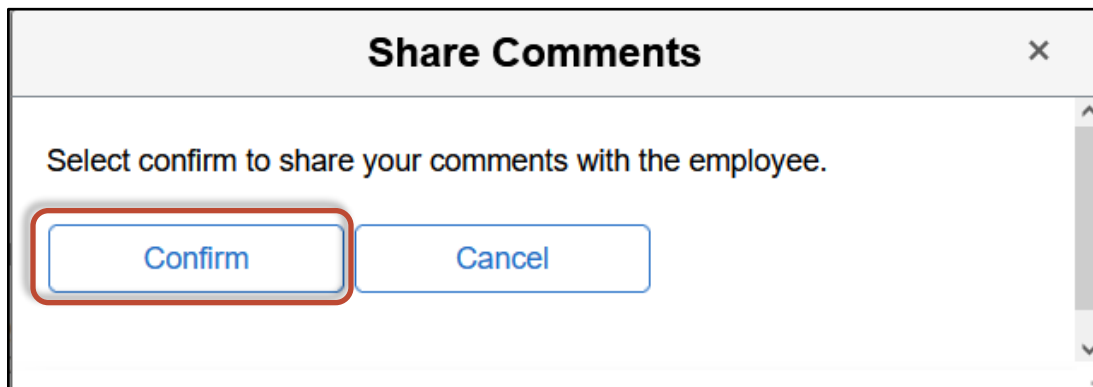


## Step 9 of 12 – Share Comments with Your Employee

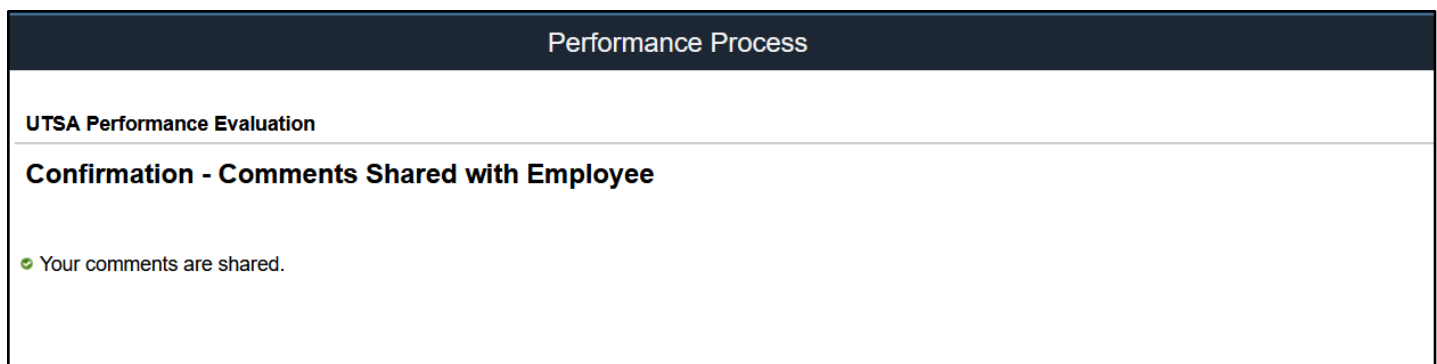
Select **Share with Employee**.



The screen below will appear. Select **Confirm**



The screen below will appear confirming that your comments have been shared.



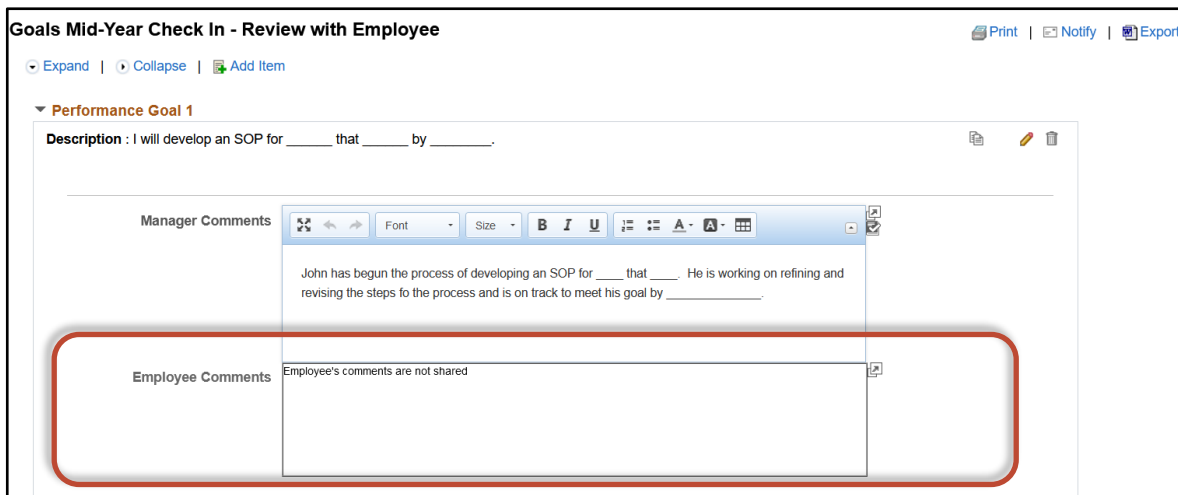
Select **Review with Employee**.

## Step 10 of 12 – Employee Comments

After you have met with your employee, allow time for them to enter additional comments.

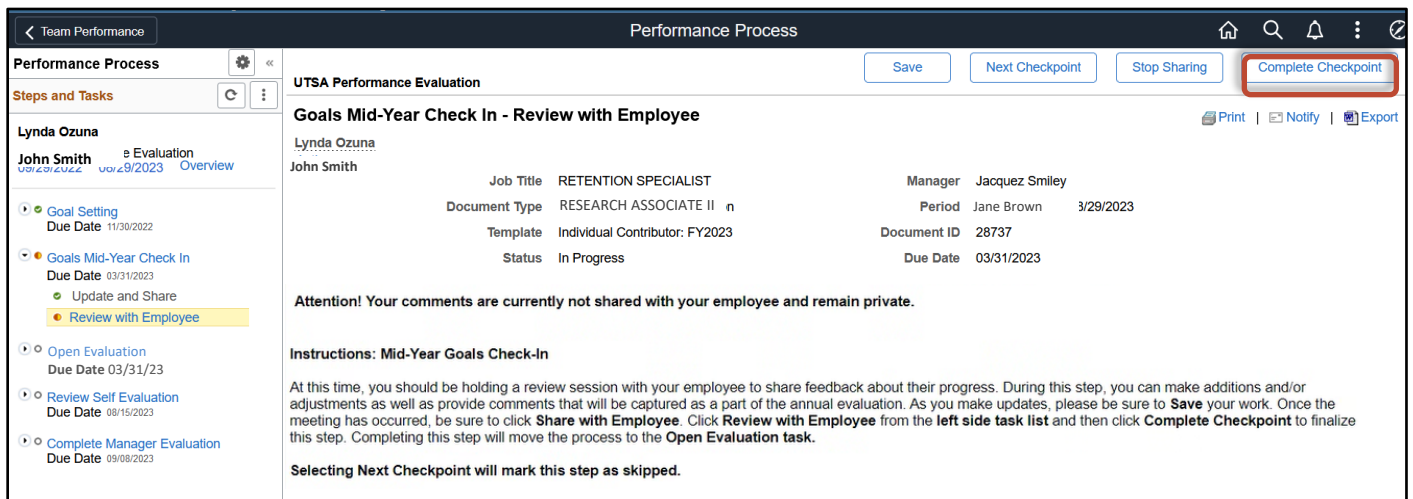
If an employee has not shared their comments, you will see the message: “Employee’s comments are not shared.”

You will receive an email notification after the employee has shared their comments with you. When you open the Goals Mid-Year Check-In, you will be able to view their comments.

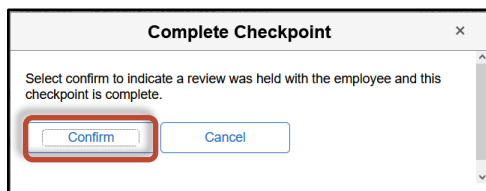


## Step 11 of 12 – Complete Checkpoint

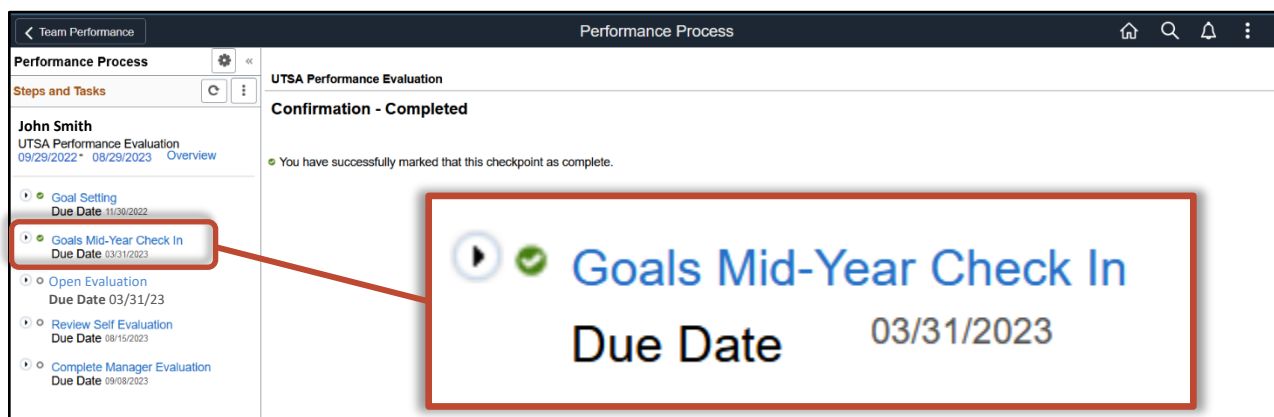
Select **Complete Checkpoint**.



A pop-up will appear on your screen. Select **Confirm**.

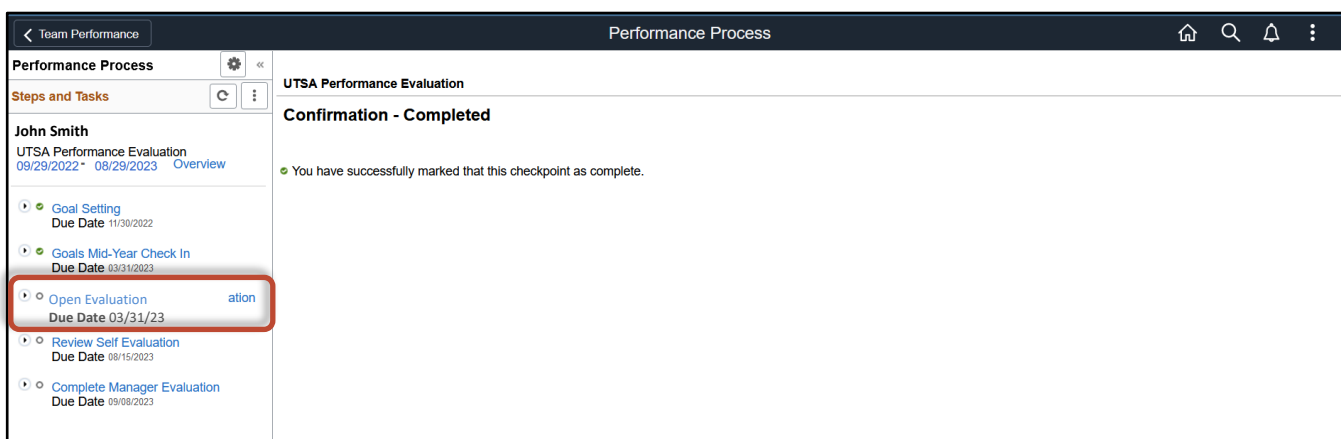


The screen below will appear confirming that you have successfully completed the checkpoint, and a green checkmark will appear next to Goals Mid –Year Check-In.



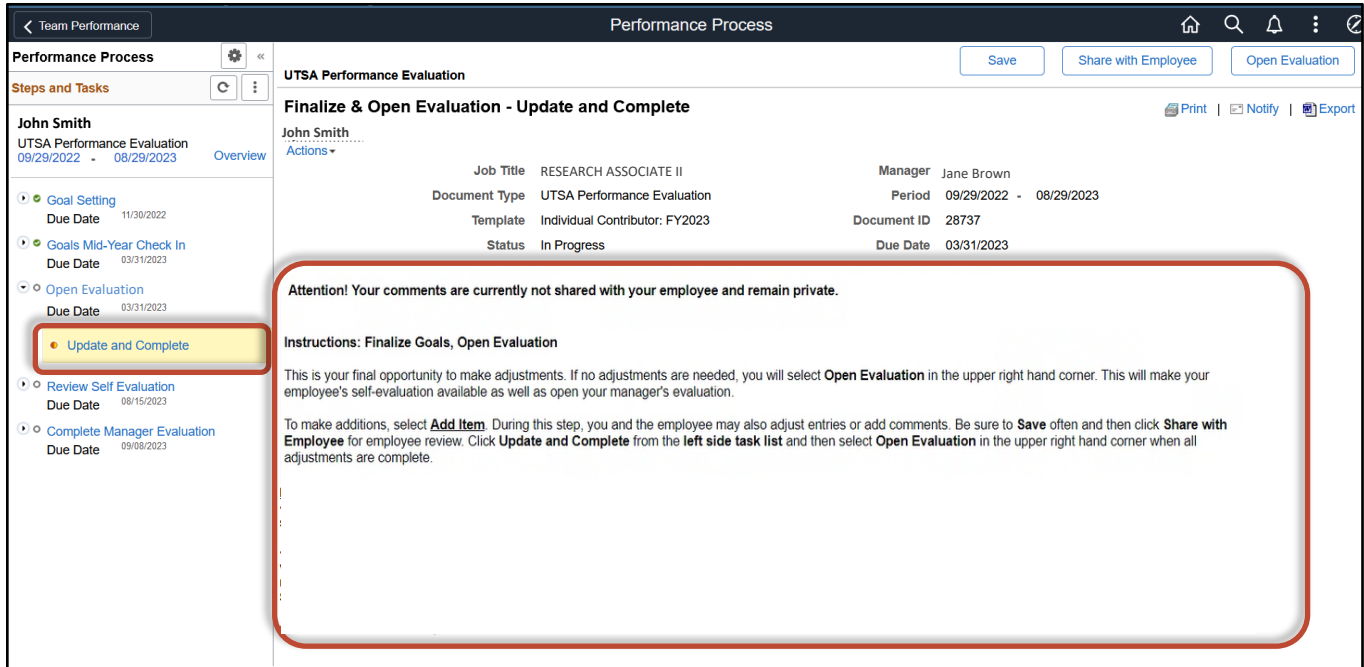
## Step 12 of 12 –Open Evaluation

Select **Open Evaluation**.





Select **Update and Complete**. Read the instructions on the screen.



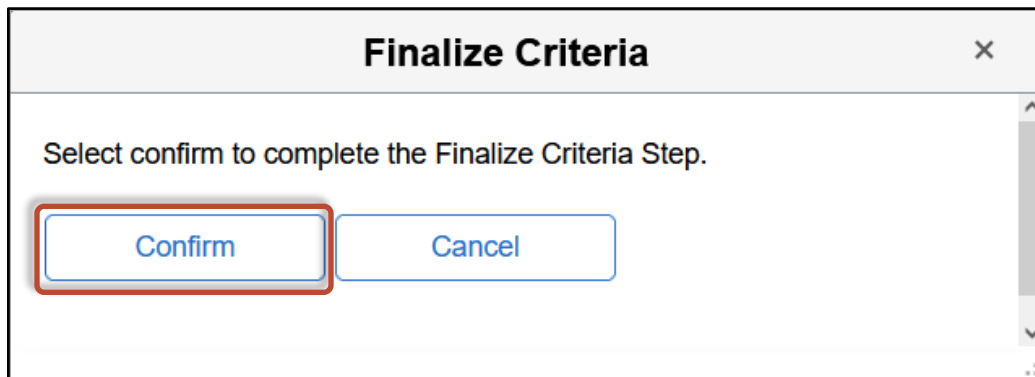
**IMPORTANT:** This is your final opportunity to adjust the goals recorded on your employee's evaluation. If no adjustments are needed, you will complete the checkpoints by opening the evaluation. This will make your employee's self-evaluation and your manager evaluation available. If adjustments are needed, be sure to make them before you select **Open Evaluation**.

**Please note that you can reopen this step at any time up until the first save is done on the evaluation. Once the evaluation is saved, the checkpoints cannot be reopened and the goals cannot be adjusted.**

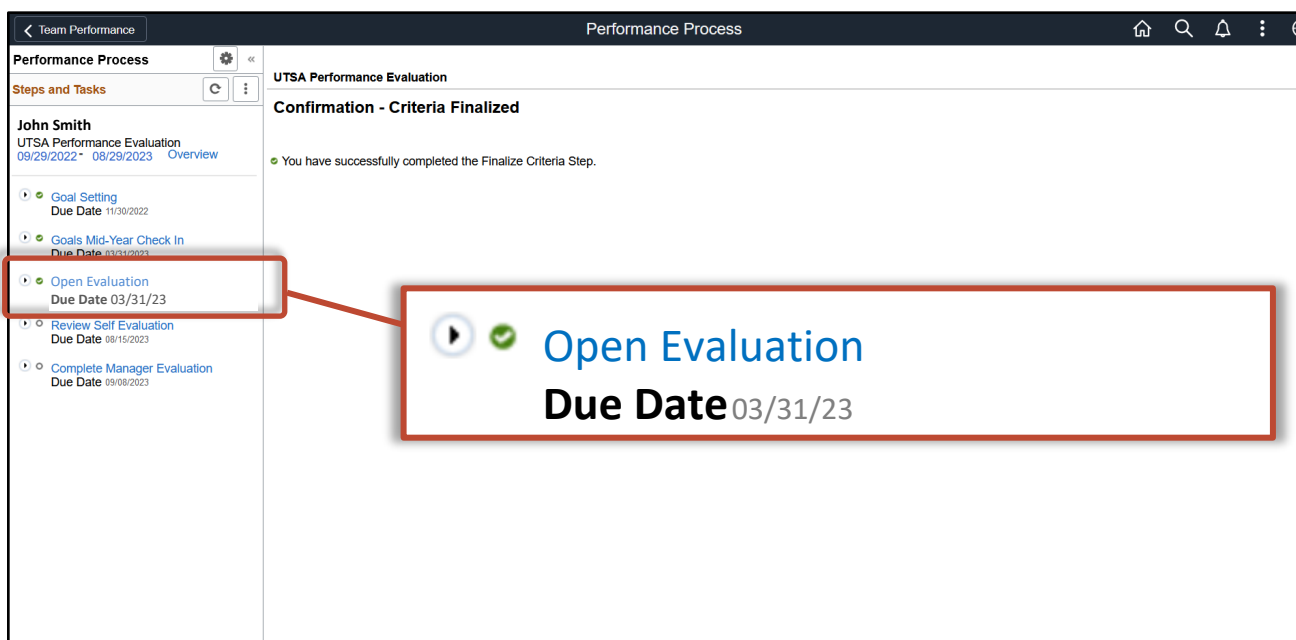
Once you have ensured goals are updated, select **Open Evaluation**.



The pop-up shown below will appear. elect **Confirm**.



The screen below will appear confirming that you have successfully completed this checkpoint and a green checkmark will appear next to **Open Evaluation**.



The employee's self-evaluation and your manager evaluation are now available.

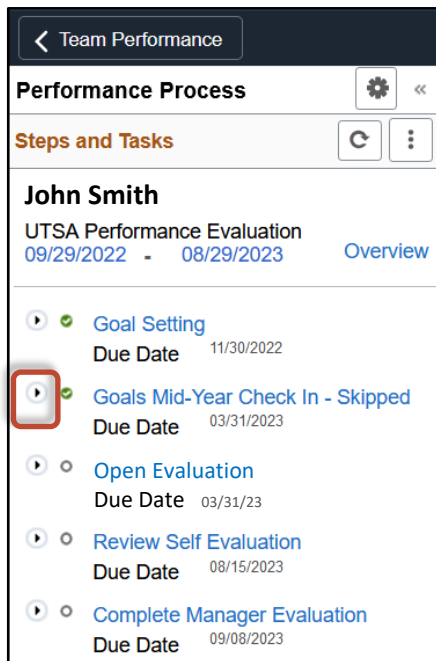
**Remember:**

- If adjustments are needed, be sure to complete and share them prior to clicking Open Evaluation.
- Please note that you can reopen this step at any time up until the first save is done on the evaluation.
- **Once the evaluation is saved, the checkpoints cannot be reopened and the goals cannot be adjusted.**

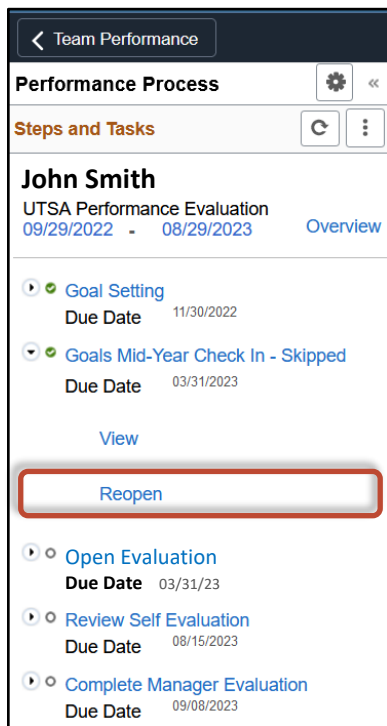
## FEATURE – Reopen a Skipped Checkpoint

To reopen a checkpoint that you have skipped:

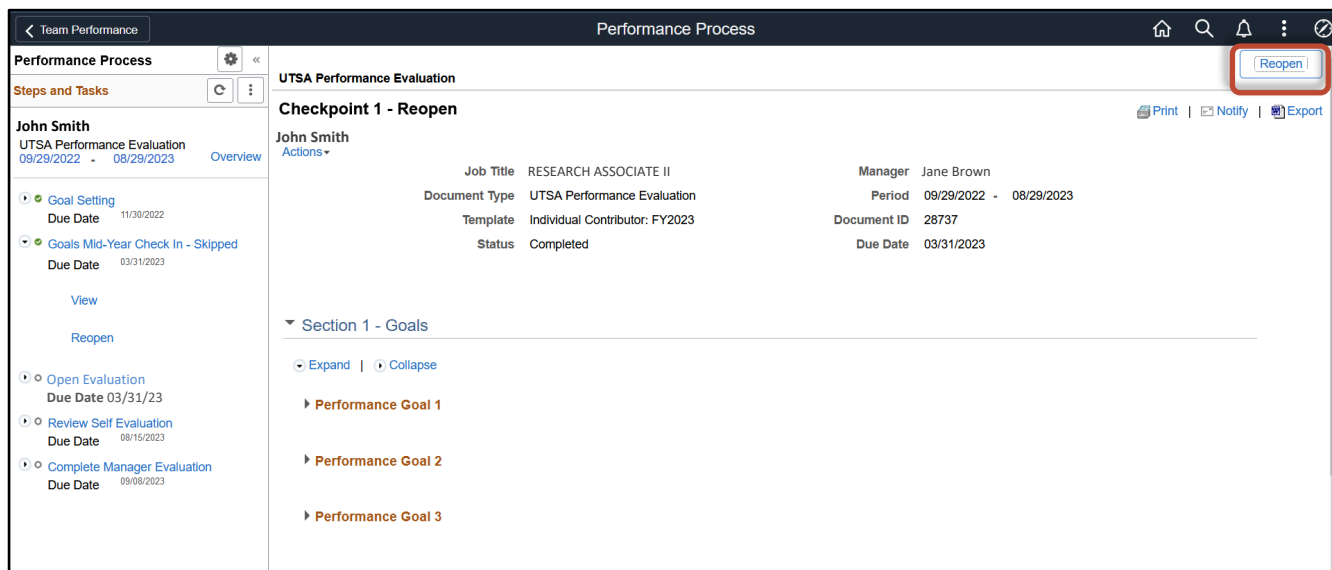
Select the small arrow next to **Goals Mid-Year Check In – Skipped**.



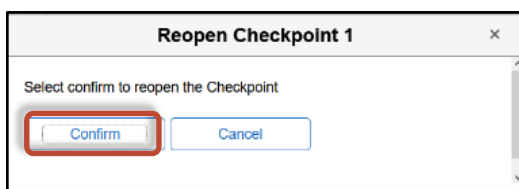
Select **Reopen**.



Select **Reopen** in the upper right corner of the screen.



A pop-up will appear. Select **Confirm**.



The screen below will appear confirming that you have reopened the checkpoint.

The screenshot displays the 'Performance Process' interface. At the top, there is a navigation bar with a back arrow and 'Team Performance' on the left, and 'Performance Process' on the right. Below this, the main content area is divided into two sections. The left section, titled 'Performance Process', contains a sub-section 'Steps and Tasks' with a refresh icon and a menu icon. It lists tasks for 'John Smith' under 'UTSA Performance Evaluation' (09/29/2022 - 08/29/2023) with an 'Overview' link. The tasks listed are: 'Goal Setting' (Due Date: 11/30/2022), 'Goals Mid-Year Check In' (Due Date: 03/31/2023), 'Open Evaluation' (Due Date: 03/31/23), 'Review Self Evaluation' (Due Date: 08/15/2023), and 'Complete Manager Evaluation' (Due Date: 09/08/2023). The right section, titled 'UTSA Performance Evaluation', displays a 'Confirmation - Checkpoint Reopened' message with a green checkmark icon and the text: 'You have successfully reopened the Checkpoint.'

