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.
Manager Guide: Mid-Year Check-In

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.
Step 4 of 12 – Verify
Verify employee information.

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.

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.

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:  

![Spell Check icon](image)
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.

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

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 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.
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**

![Share Comments](image)

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

![Performance Process](image)

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.

<table>
<thead>
<tr>
<th>Performance Process</th>
<th>Performance Process</th>
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<tbody>
<tr>
<td><strong>Steps and Tasks</strong></td>
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<td><strong>John Smith</strong></td>
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<td>UTSA Performance Evaluation</td>
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<tr>
<td>09/29/2022 - 08/29/2023</td>
<td>Overview</td>
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<tr>
<td>- Goal Setting</td>
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<td>Due Date 11/30/2022</td>
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<tr>
<td>- Goals Mid-Year Check In</td>
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<tr>
<td>Due Date 03/31/2023</td>
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<tr>
<td>- Open Evaluation</td>
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<td>Due Date 03/31/23</td>
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<tr>
<td>- Review Self Evaluation</td>
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<td>Due Date 08/15/2023</td>
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<tr>
<td>- Complete Manager Evaluation</td>
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<tr>
<td>Due Date 09/08/2023</td>
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</table>

**Confirmation - Checkpoint Reopened**

- You have successfully reopened the Checkpoint.