MANAGER TASKS FOR PERFORMANCE DOCUMENTS

The following instructions will walk you through how to access Check-ins through Current Documents, Historical Documents, and View-Only Documents.

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Human Resources > Manager Self Service > UF Engaged > Performance Documents

CURRENT DOCUMENTS

The Current Documents function enables you to view all pending documents related to your direct reports.

Here is a list of Document Types and Document Statuses you will be able to access:

**Document Types:**
- Mid-Point Probation Check-in
- Six Month Probation Check-in
- Extend 9MO Probation Check-in
- Extend 12MO Probation Check-in
- Quarterly Check-in
- Special Perf Improvement Plan

**Document Status:**
- Evaluation in Progress
- Approval
HISTORICAL DOCUMENTS

The **Historical Documents** function enables you to view all *completed* or *cancelled* documents related to your direct reports.

![Performance Document History](image)

**View-Only Documents**

The **View-Only Documents** function enables you to view all historical documents related to the *direct* and *indirect reports* within your chain of supervision.

![View-Only Documents](image)

By default, you will see your direct reports. By clicking on the **Plus button**, you can see *their* direct reports.

![View-Only Documents](image)

By clicking on the nested **Plus buttons**, you can continue to drill down and view more indirect reports.

![View-Only Documents](image)