

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The following instructions will walk you through how to access Check-ins through Current Documents, Historical Documents, and View-Only Documents.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

**Current Performance Documents**

Enter the search criteria, then select the **Search** button. To access a particular document, select the document's "Reviewer" hyperlink.

**Filter Criteria**

First Name  Last Name

Document Type  Document Status

Period Between  -

Documents you own							
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
12345678	Gator, Albert	Quarterly Check-in	Evaluation in Progress	08/27/2019	11/26/2019	IT Analyst I	11/27/2019
24688642	Turner, Pagie	Quarterly Check-in	Evaluation in Progress	08/14/2019	11/13/2019	IT Analyst I	11/14/2019
13577531	Time, Justin	Six Month Probation Check-in	Evaluation in Progress	08/11/2019	11/10/2019	IT Analyst I	11/05/2019

## HISTORICAL DOCUMENTS

The **Historical Documents** function enables you to view all *completed* or *cancelled* documents related to your direct reports.

**Performance Document History**

Listed here are the completed and canceled documents for which you are the Manager. You can access a document by selecting the "Employee" hyperlink.

**Filter Criteria**

First Name  Last Name

Document Type  Document Status

Period Between  -

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Rating
24688642	<a href="#">Turner, Paige</a>	Quarterly Check-in	Canceled	03/21/2019	06/20/2019	IT Analyst I	
12345678	<a href="#">Gator, Albert</a>	Six Month Probation Check-in	Completed	03/21/2019	06/20/2019	IT Analyst I	
34567812	<a href="#">Peace, Warren</a>	Six Month Probation Check-in	Completed	04/03/2019	07/02/2019	Agricultural/Food Scntst III	Probation Extended
13577531	<a href="#">Time, Justin</a>	Six Month Probation Check-in	Completed	04/04/2019	07/03/2019	IT Analyst I	Probation Extended
98765432	<a href="#">Nadar, Sarah</a>	Quarterly Check-in	Canceled	01/01/2019	03/31/2019	IT Analyst I	

## 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**

**Employee Selection Criteria**

Select the employee you would like to view documents for.

As Of Date

**Rodriguez, Jenny Cookies's employees**

Select	Name	Empl ID	HR Status	Job Title	Department
<input type="button" value="Select"/>	<a href="#">Gator, Albert</a>	11026710	Active	IT Professional I	FA-TREASURY MGT-ADMIN
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Peace, Warren</a>	13136115	Active	IT Analyst I	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Turner, Paige</a>	94729610	Active	MGR, IT	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Wood, Holly</a>	10650601	Active	Applic Developer Analyst III	IT - ENTERPRISE SYSTE

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

<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Turner, Paige</a>	94729610	Active	MGR, IT	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Wood, Holly</a>	10650601	Active	Applic Developer Analyst III	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Time, Justin</a>	67541491	Active	IT Analyst II	IT - ENTERPRISE SYSTE

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

<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Turner, Paige</a>	94729610	Active	MGR, IT	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Wood, Holly</a>	10650601	Active	Applic Developer Analyst III	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> <a href="#">Time, Justin</a>	67541491	Active	IT Analyst II	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input type="checkbox"/> Mand, Olene	99522969	Active	IT Analyst I	IT - ENTERPRISE SYSTE
<input type="button" value="Select"/>	<input type="checkbox"/> Alligator, Alberta	48456997	Active	IT Analyst I	IT - ENTERPRISE SYSTE