Quarterly Check-ins

What if I miss the Check-in Deadline?
If you don't submit your Quarterly Check-in before the due date, it will expire, and the next quarter will begin. However, you should still meet and discuss. If there's anything that needs to be recorded, you can work with your Employee Relations Specialist to document.

Understanding Check-ins
Check-ins are quarterly discussions between employees and leaders designed to provide clear and timely feedback on performance.

Completing Check-ins
Check-ins can be completed on any electronic device. If access is limited, please work with your department's Human Resources representative.

Exempt and Non-Exempt Employees
Both exempt and non-exempt employees use the same template format for Quarterly Check-ins.

Privacy of Check-ins
Leaders can view Check-ins for their direct reports. College/Division HR Liaisons and department HR representatives can access Historical Check-ins.

Customizing Check-ins
The verbiage on the Quarterly Check-in template cannot be adjusted. Leaders have discretion in focusing their comments on specific or broad topics.

Tracking Check-in Completion
Administrators at the college/department level can track and generate reports to encourage engagement.

Frequency of Check-ins
UF Engaged encourages ongoing communication, allowing more frequent check-ins based on employee needs.

Quarterly Check-in Notifications
Employees do not receive email notifications regarding the completion or submission of their Quarterly Check-ins.
Supervisor on Leave and Quarterly Check-in
If a supervisor is on leave and can’t complete the Quarterly Check-in, employees are encouraged to complete their Self-Assessment and then contact their department’s Human Resources Representative to inquire about the manager’s portion of the Check-in.

Review of Check-ins for Job Applications
Supervisor feedback from Quarterly Check-ins can be reviewed by other UF hiring managers for job applications. Contact UF Human Resources Recruiter for access to past Check-ins.

How to Access Quarterly Check-ins?
All Quarterly Check-ins are accessible in UF Engaged through Employee Self-Service. Find guidance on accessing the Quarterly Check-ins.

Visibility of Quarterly Check-in Content
Employees can view the content in Quarterly Check-ins once their leader completes and submits them.

Adding Comments to Quarterly Check-ins
Employees cannot add comments to a submitted Quarterly Check-in within myUFL. Additional comments can be documented in a separate file in the employee’s official personnel record with the University.

Performance Notes
What Are Performance Notes?
Performance Notes in UF Engaged allow leaders and employees to track performance-related events. Use them as a resource when preparing for Quarterly Check-ins. Notes are only accessible to the user who entered them.

Privacy of Performance Notes
Performance Notes are not public records subject to Florida’s Sunshine Law if they haven’t been shared with others.

Printing Performance Notes
Performance Notes do not have a print option. Users can right-click print or copy the content into an email or Word document, but it’s not recommended to print them from the system.
Technical Questions

Missing Email Notification for Check-in
If you didn't receive an email notification for your Check-in, check your junk mail and deleted items folders. If it's not there, verify your business email in myUFL and contact your departmental IT support if needed.

(Supervisors receive two emails: one approximately 30 days out, and another approximately 14 days out. Employees receive one email about 30 days out.)

Lost Content After an Error
The UF Engaged system is limited by myUFL and may time out due to inactivity, resulting in lost content. Always hit "Save" before stepping away from your computer.

Supervisor Notifications for Self-Assessment
Supervisors do not receive email notifications when a Self-Assessment is completed. It's best practice for the employee to notify their supervisor after submission.

General

Self-Assessment Completion and Discipline
Self-Assessments are optional and not subject to discipline. However, departments encourage participation in the Check-in through the employee Self-Assessment.

Editing Self-Assessment
Once an employee submits their Self-Assessment, they cannot edit it. However, they can edit it if it's only saved, not submitted.

Providing Feedback to Leaders
While UF Engaged doesn't include 360-performance evaluations, employees can provide self-assessments but not manager assessments.

Understanding Review Outcomes
Quarterly Check-ins aim to facilitate open discussions about performance, accomplishments, growth opportunities, and goals. The goal is to have a productive conversation about performance and growth.