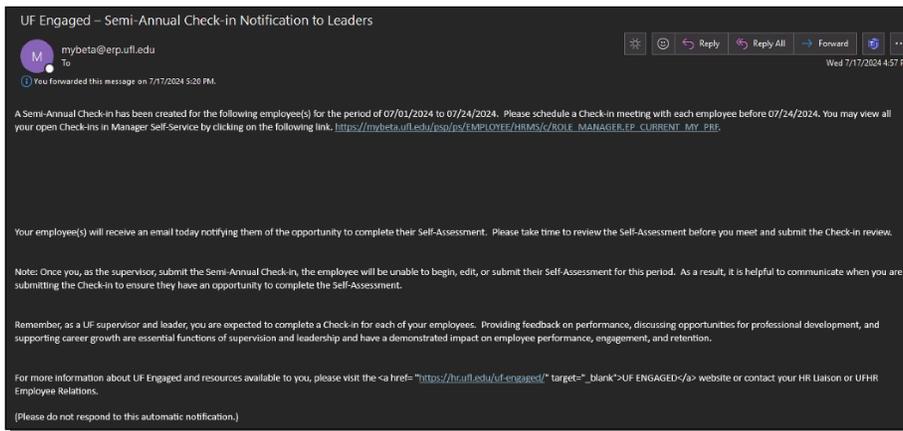


CHECK-INS FOR LEADERS

The following instructions will walk you through how a leader completes a Check-in for staff employees.

Leaders will receive one email with the names of all the employees they manage prompting them to complete an evaluation. A reminder email will be sent 7 days prior to the April and October deadlines.



NAVIGATION

Log in to myUFL and navigate to:

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

1. You will see a list of Performance Documents. To complete a Semi-Annual Check-in, click on the **employee's name**. Make sure that you click on the row featuring the **Semi-Annual Check-in** Document Type.

NOTE: If you do not complete the Check-in by the date listed under **Next Due Date**, the document will be cancelled.

The screenshot shows the "Current Performance Documents" page. It lists documents for which the user is the Manager. The table below shows the data:

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
43634551	Doe, Jane	Semi-Annual Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Analyst II	10/31/2024
50873606	Gabor, Alberta	Semi-Annual Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Special Projects Analyst	10/31/2024

- The Check-in document includes four text entry fields labelled **Manager Comments**. This is where you will enter your comments.

UF Engaged Performance Process

Semi-Annual Check-in

Manager Assessment - Update and Complete

Actions ▾

	Job Title IT Analyst II	Manager
Document Type Semi-Annual Check-in	Period 07/06/2024 - 07/31/2024	Document ID 193092
Template	Status Evaluation in Progress	Due Date 08/01/2024

▾ Expand All | ▾ Collapse All | ✓ Check Language | ⚙ Cancel Evaluation

▾ UF Instructions - Semi-Annual Check-in

The leader uses the Semi-Annual Check-in to communicate and document clear, timely, and meaningful feedback about an employee's performance. Please complete the sections below to reflect on the employee's performance for the past 6-month period and to set goals moving forward.

▾ 1. Document progress, strengths, events, and accomplishments.

▾ Expand | ▾ Collapse

Manager Comments

← → A^B ▾ AI ▾ A ▾ A ▾ B I U ☰ ☷ ☹

- Under **1. Document progress, strengths, event, and accomplishments**, **enter your comments** related to these criteria. The first text entry box provides space to give positive feedback to the employee related to strengths demonstrated or achievements of the past six months. Note that below each Manager Comments text entry field, you will see the employee's comments if the employee has completed their Self-Assessment.

Manager Comments

← → A^B ▾ AI ▾ A ▾ A ▾ B I U ☰ ☷ ☹

Jane Doe has demonstrated remarkable progress and exceptional dedication over the past six months. Her strong analytical skills and attention to detail have significantly contributed to the team's success in various projects. One of her notable accomplishments includes leading the implementation of a new project management software that has streamlined our workflow, resulting in a 20% increase in overall efficiency. Jane's ability to communicate effectively and collaborate with team members has fostered a more cohesive and productive work environment. Her proactive approach in identifying and addressing potential issues before they escalate has been invaluable. Additionally, Jane has taken the initiative to mentor junior staff, sharing her knowledge and expertise to help them grow professionally. Her innovative thinking and problem-solving abilities

Employee Comments

Over the past six months, I have dedicated myself to contributing effectively to our team's success. My focus on effective communication and collaboration with my team members has fostered a more cohesive and productive work environment. One of my notable accomplishments has been leading the implementation of a new project management software, which has streamlined our workflow and increased overall efficiency by 20%. By taking a proactive approach to identify and address potential issues early on, I have been able to

4. Next, scroll down and fill out the remaining **text entry fields**.

Note: Section 2 (specific performance opportunities) includes two sub-sections: **2.a.** is for feedback related to areas where the employee is performing well or well enough but improvement could elevate their overall performance in the role (i.e., you are good in this area, but you could be even better); **2.b.** is for feedback related to areas where they employee needs to improve in order to meet the expectations of the role (i.e., this is an area where improvement is critical).

Section 3 is a space to enter any important goals for the next 6 months as well as career or professional development opportunities being provided to support the employee.

2. Specific performance opportunities-

a. Indicate areas where good performance can be elevated.

Manager Comments

Jane Doe has shown commendable performance over the past six months, consistently demonstrating strong analytical skills and attention to detail. Her efforts in optimizing our data analysis processes have resulted in more accurate and timely reports, which have been valuable for decision-making. Jane has also played a key role in enhancing our client communication protocols, contributing to an improvement in client satisfaction. However, there are areas where she can further elevate her performance. Specifically, Jane could benefit from developing her strategic planning skills to better anticipate long-term project needs and potential obstacles. Additionally, while her collaboration with team members has been effective, there is an opportunity for her to take on more leadership roles in cross-departmental initiatives, which would broaden her impact and visibility within the organization. By focusing on these areas, Jane has the potential to achieve

Employee Comments

Over the past six months, I have worked hard to demonstrate strong analytical skills and attention to detail, which have helped optimize our data analysis processes and produce more accurate, timely reports. Enhancing our client communication protocols has been another focus of mine, leading to improved client satisfaction. While I am proud of these accomplishments, I recognize there are areas where I can further elevate my performance. Developing my strategic planning skills to better anticipate long-term project needs and potential obstacles is a priority for me. Additionally, I see the value in taking on more leadership roles in cross-departmental initiatives, which would broaden my impact and visibility

Manager Assessment - Update and Complete

b. Indicate areas, if any, where improvement is needed to meet expectations. Provide a plan of action, if appropriate.

Manager Comments

Jane Doe has shown commendable performance in her role, consistently demonstrating strong analytical skills and attention to detail. Her efforts in optimizing our data analysis processes have resulted in more accurate and timely reports, which have been valuable for decision-making. Jane has also played a key role in enhancing our client communication protocols, contributing to an improvement in client satisfaction. However, there are areas where she can further elevate her performance. Specifically, Jane could benefit from developing her strategic planning skills to better anticipate long-term project needs and potential obstacles. Additionally, while her collaboration with team members has been effective, there is an opportunity for her to take on more leadership roles in cross-departmental initiatives, which would broaden her impact and visibility within the organization. By focusing on these areas, Jane has the potential to achieve

Employee Comments

I understand that there are areas where I need to improve to meet the expectations of my role. While I have been diligent in tasks such as updating client records and managing project timelines, my attention to detail has occasionally faltered, resulting in minor but impactful errors. I am committed to enhancing my time management skills to ensure that deadlines are consistently met without compromising the quality of my work. Additionally, my ability to effectively prioritize tasks has been lacking, leading to unnecessary delays in critical projects. I also encourage Jane to take more initiative in team meetings and contribute more actively to brainstorming sessions. By addressing these areas, I believe Jane can reach her full potential and contribute more effectively to our organization's success.

Semi-Annual Check-in

Manager Assessment - Update and Complete

3. Identify goals, areas for skill development, and/or career/growth opportunities.

Manager Comments

Jane Doe has set a significant work-related goal to improve our team's data visualization techniques, aiming to present complex information more clearly and effectively. This goal aligns well with our department's objectives, and I am confident in her ability to achieve it given her analytical skills and dedication. Additionally, Jane has expressed a strong interest in pursuing further professional development in project management, specifically seeking certification in Agile methodologies. I fully support this career development path, as it will not only enhance her skill set but also benefit our team by bringing in new strategies for efficient project execution. I am grateful for the support of my manager, who is committed to providing me with the necessary resources and opportunities to achieve these goals, and I look forward to seeing her growth and contributions in these areas.

Employee Comments

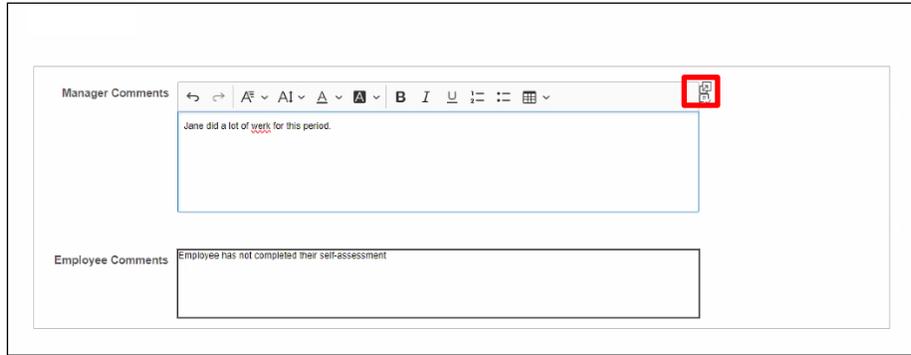
I have set a significant work-related goal to improve our team's data visualization techniques, aiming to present complex information more clearly and effectively. This goal aligns well with our department's objectives, and I am confident in my ability to achieve it given my analytical skills and dedication. Additionally, I have a strong interest in pursuing further professional development in project management, specifically seeking certification in Agile methodologies. I believe this career development path will not only enhance my skill set but also benefit our team by bringing in new strategies for efficient project execution. I am grateful for the support of my manager, who is committed to providing me with the necessary resources and opportunities to achieve these goals. I look forward to

For specific guidance on what to enter into these areas, please refer to the [UF Engaged for Leaders course](#) and the [Check-ins Guide for Leaders](#).

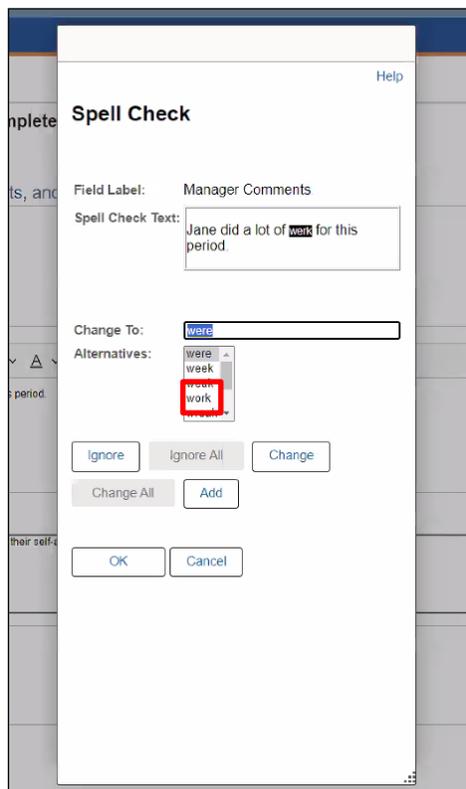
5. Important: At any point while filling out the Check-in, you can save your progress by clicking the **Save** button. If you save your progress, you can exit the page and return to add more information later. Click the **Save** button to continue. NOTE: Best practice is to click the **Save** button often when working in UF Engaged. UF Engaged does not automatically save your work for you. You do not want to lose your work due to not hitting Save. For this reason, some people find it helpful to type their Self-Assessments in Word, and then copy the text over into the UF Engaged Check-In.



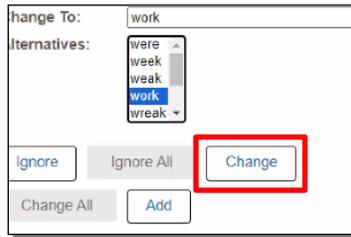
6. Click the **Spell Check** icon. This icon is available on all text entry fields in the Self-Assessment. For this example, misspelled placeholder text will be entered into the first text entry field so that the Spell Check function can be demonstrated.



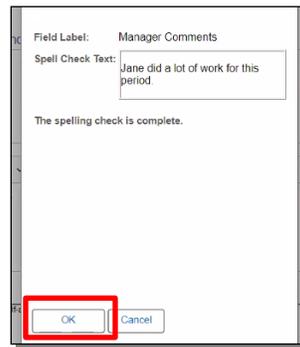
7. If there are any misspelled words, the Spell Check function will provide you with alternatives. In this case, you would click the word **work**.



8. Click the **Change** button.

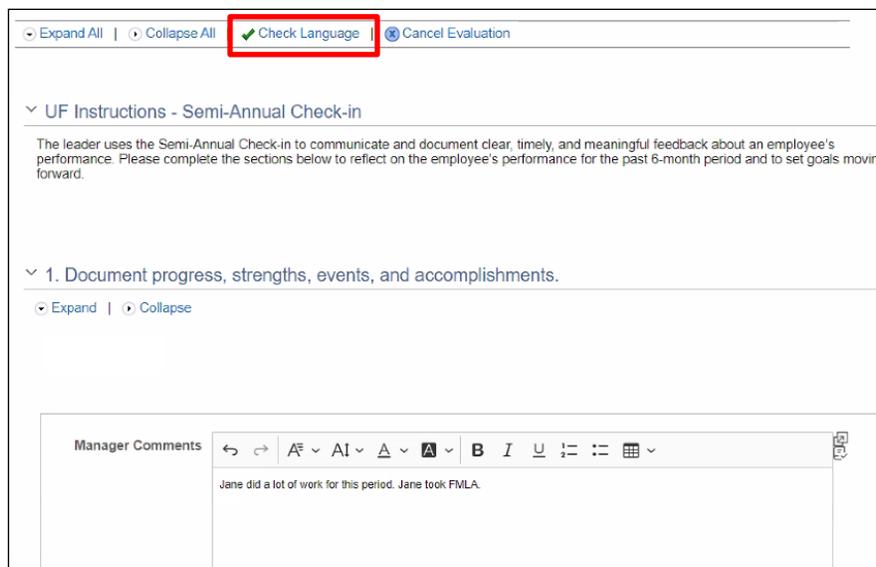


9. Click the **OK** button.

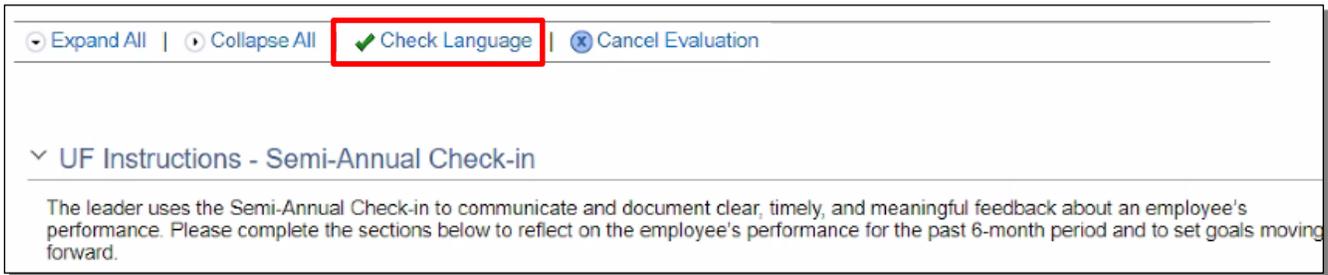


10. Note that the spelling of “work” has been corrected.

Next, this guide will demonstrate the **Check Language** function. Check Language is a tool that will review your Manager Comments for words that may not be appropriate for a Check-in. For this example, the sentence “Jane took FMLA” has been added to the Manager Comments section.



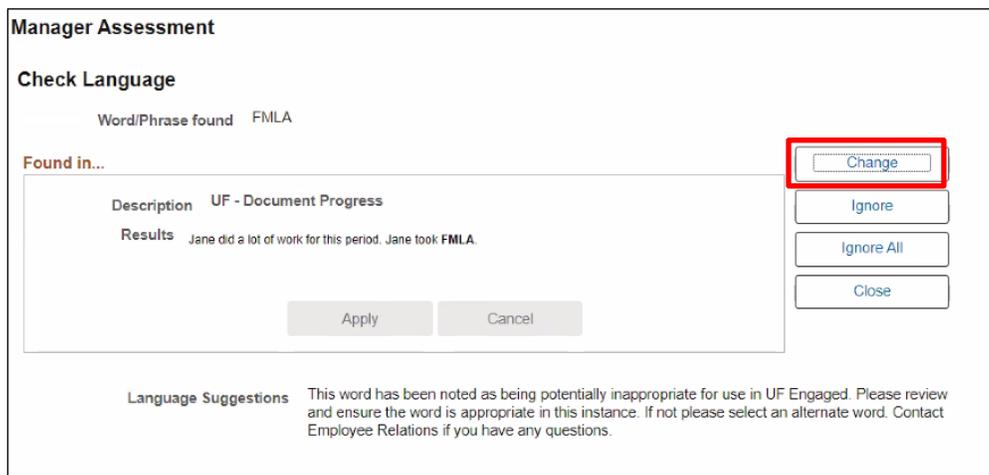
11. Click **Check Language**.



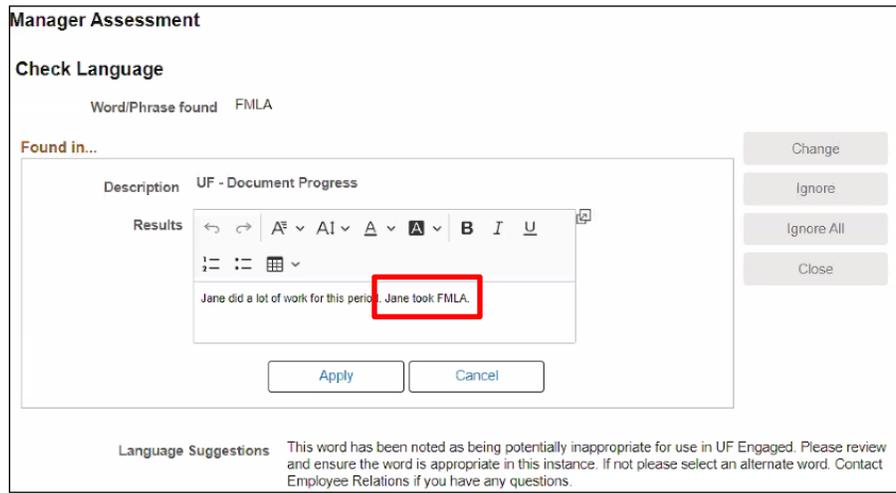
12. The Check Language function has identified the word **FMLA** as potentially inappropriate for a Check-in. If a word is flagged by the Check Language tool, you can change your word choice by clicking the **Change** button.

NOTE: There are cases when Check Language will identify words that can remain in your comments. For example, if the sentence read “Albert was instrumental in developing an FMLA process for the University,” that would be an appropriate use of FMLA. In that case, you would click the Ignore button.

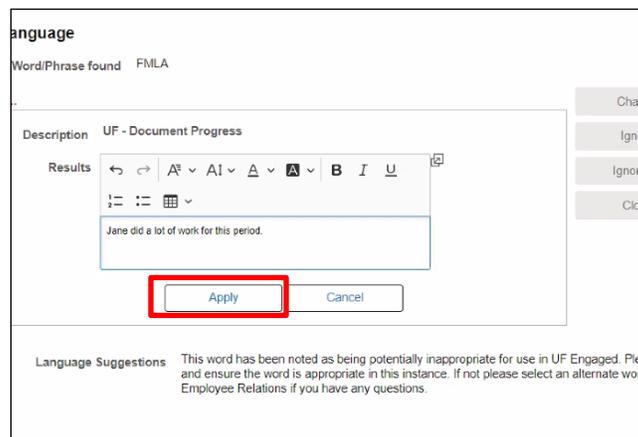
If you have questions or concerns about words identified by the Check Language tool, please contact your department Human Resources representative.



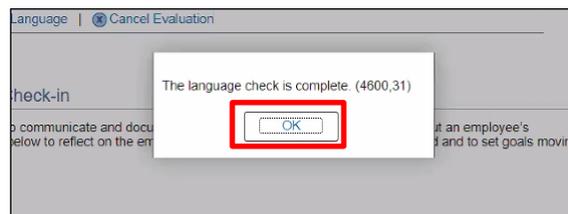
13. A text editor will appear. You will need to make adjustments as appropriate. In this example, the sentence **Jane took FMLA** will be deleted.



14. Click the **Apply** button.

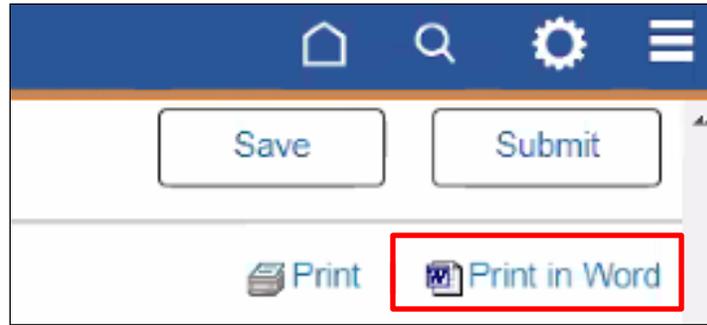


15. The language has been modified. Click the **OK** button.

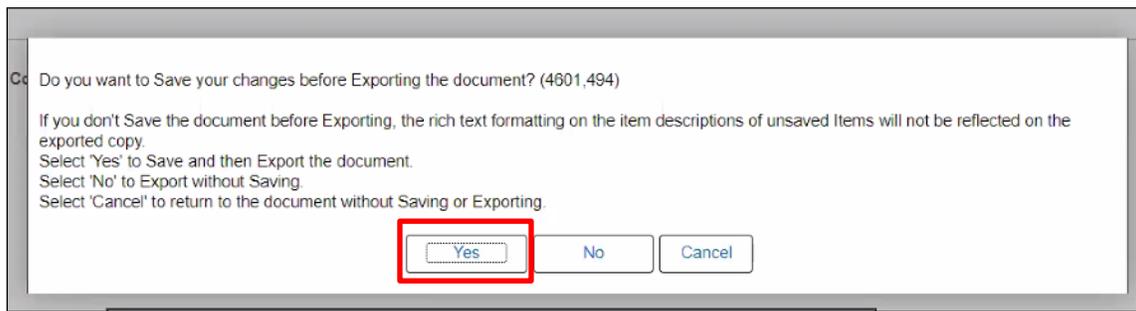


16. Once you have saved your Check-in, you can **Print in Word**. This function creates a Word Document version of the Check-in. Click **Print in Word**.

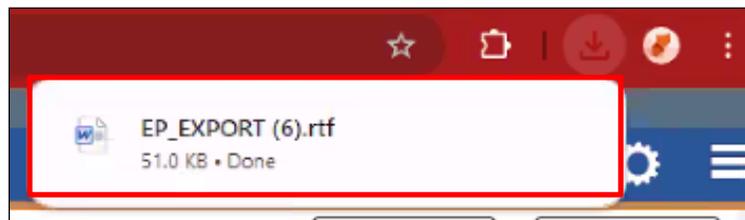
NOTE: Depending on your browser of choice, the steps to download a file may vary. This simulation demonstrates how to download and open a file using Chrome.



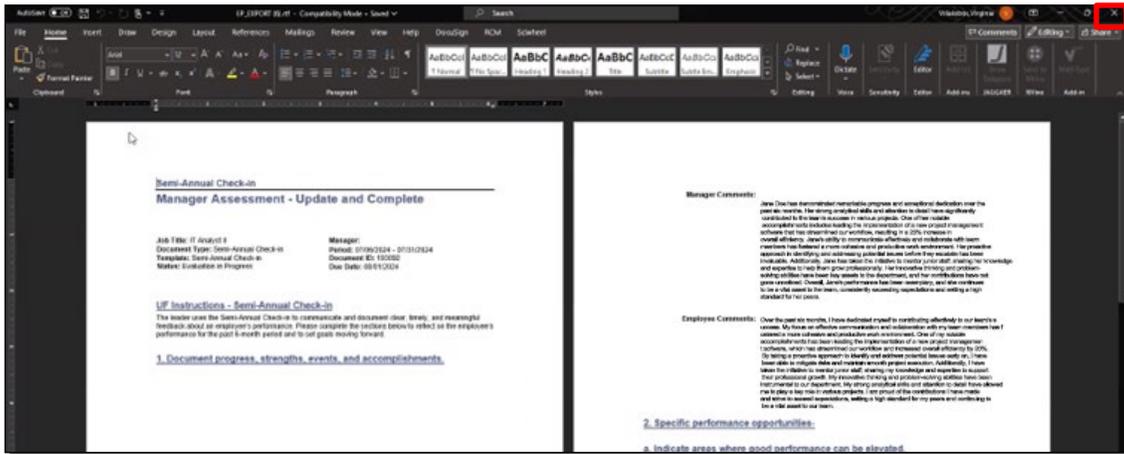
17. If you are asked to save your changes, click the **Yes** button.



18. Click the **downloaded file** to open it.

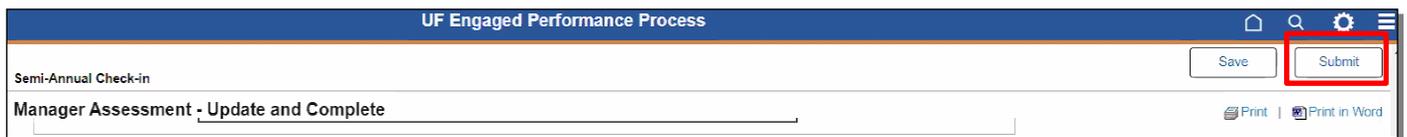


19. This document can be saved for your records. Click the **Close** icon to continue.

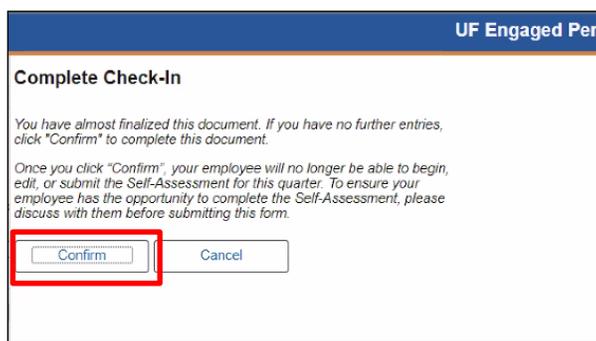


20. Once you have finalized your Check-in, click the **Submit** button.

Best Practice: Have the Check-in conversation prior to clicking Submit. Please consider if any additional information should be added as a result of the Check-in conversation.



21. Click the **Confirm** button. Once you click Confirm, the employee will be able to read your Manager Comments.



22. You have successfully completed the Check-in.

