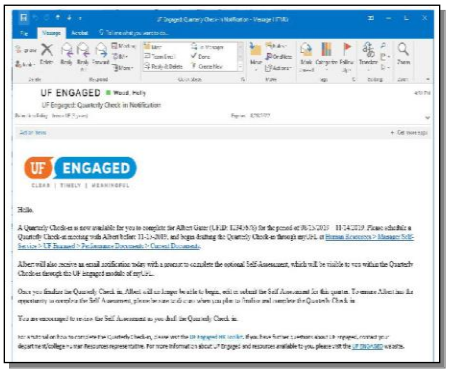
CHECK-INS FOR LEADERS

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.



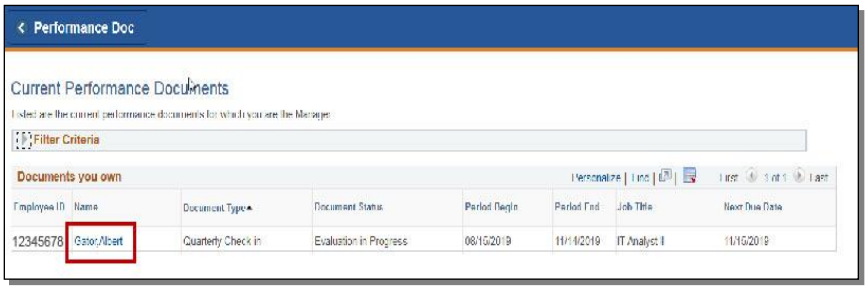
NAVIGATION

Login into myUFL and navigate to:

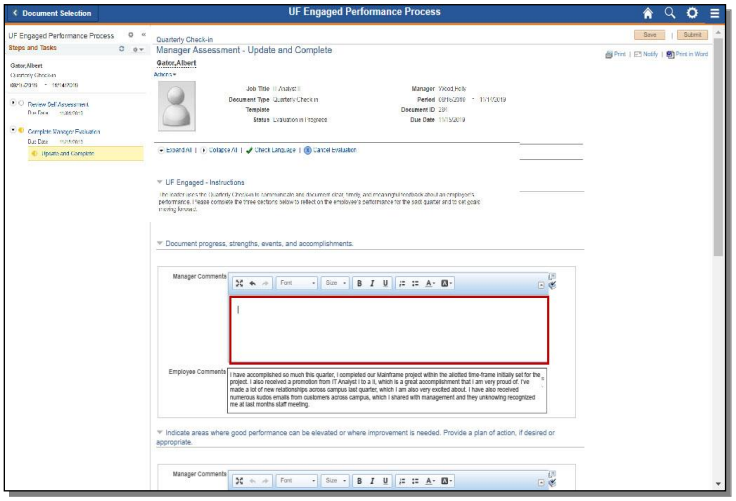
Nav Bar > Main Menu > Human Resources > Manager Self Service > UF Engaged > Performance Documents > Current Documents

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

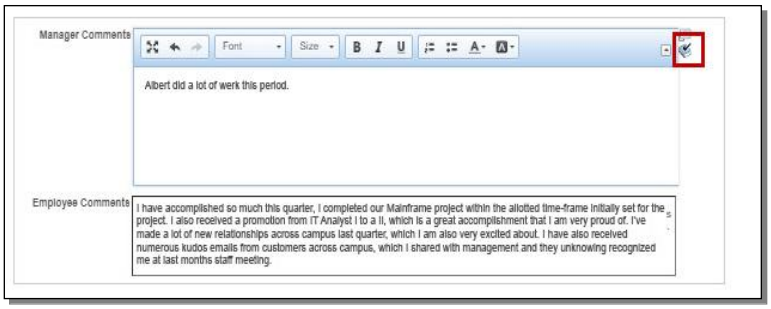
   NOTE: If you do not complete the Check-in by the date listed under **Next Due Date**, the document will be cancelled.



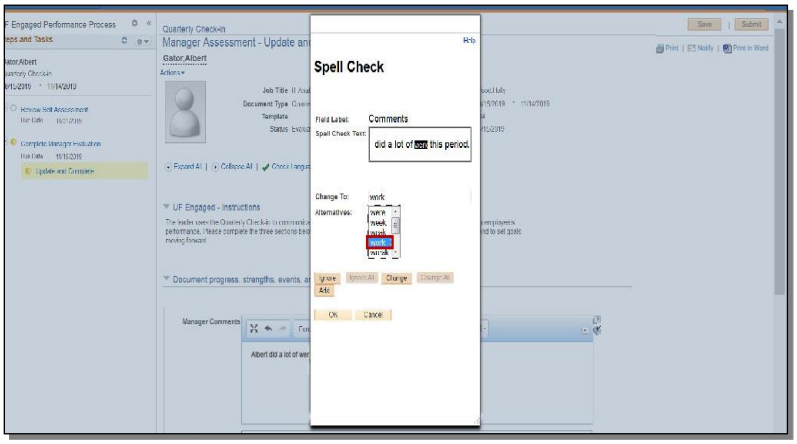
2. There are three text entry fields you must fill out for the Check-in. Note that below each text entry field, you will see the employee's comments if the employee has completed their Self-Assessment For this example, misspelled placeholder text will be entered into the first text entry field so that the Spell Check function can be demonstrated.



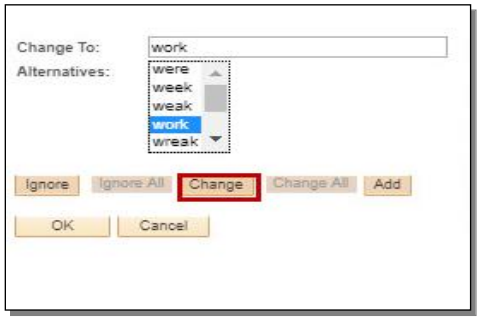
3. Click the **Spell Check** icon. This icon is available on all text entry fields in the Self-Assessment.



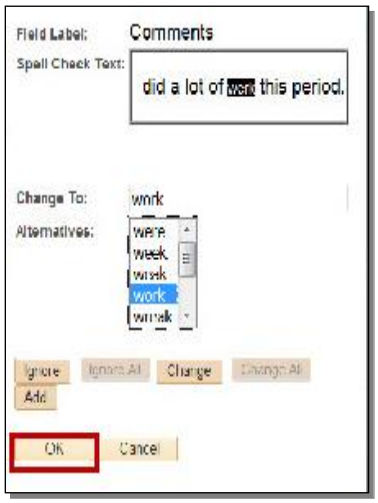
4. If there are any misspelled words, the Spell Check function will provide you with alternatives. In this case, you would click the word **work**.



5. Click the **Change** button.

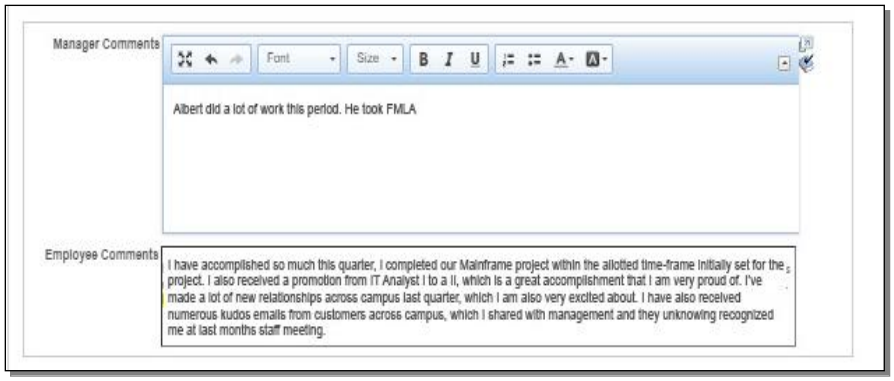


6. Click the **OK** button.

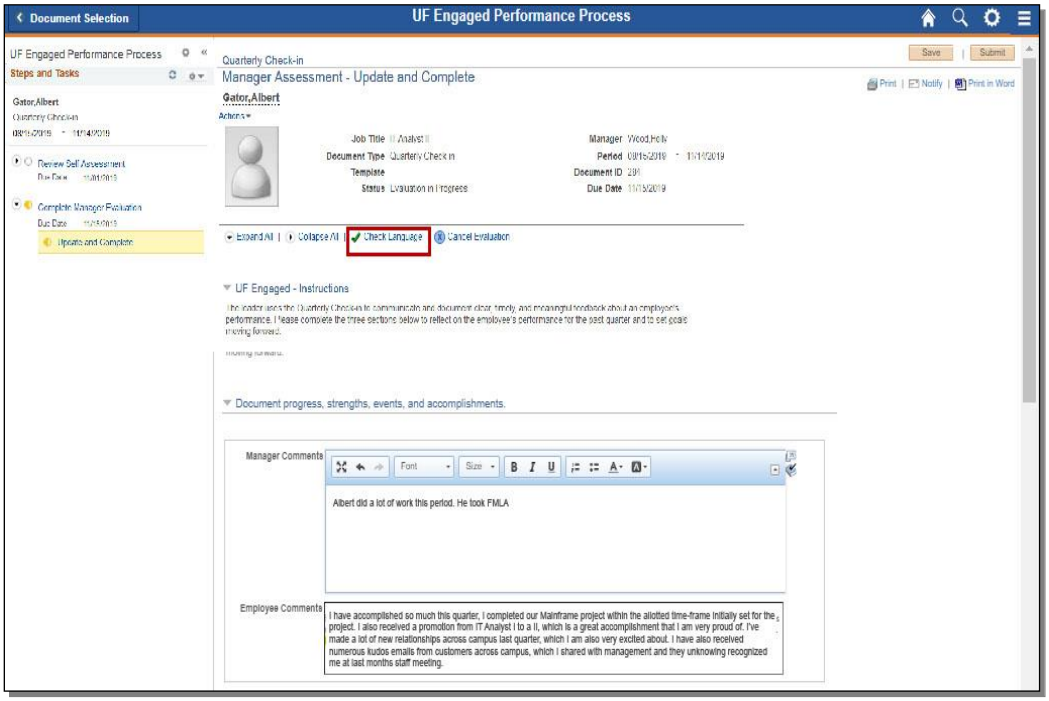


7. Note that the spelling of "work" has been corrected.

Next, this simulation 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 "He took FMLA" has been added to the Manager Comments section.



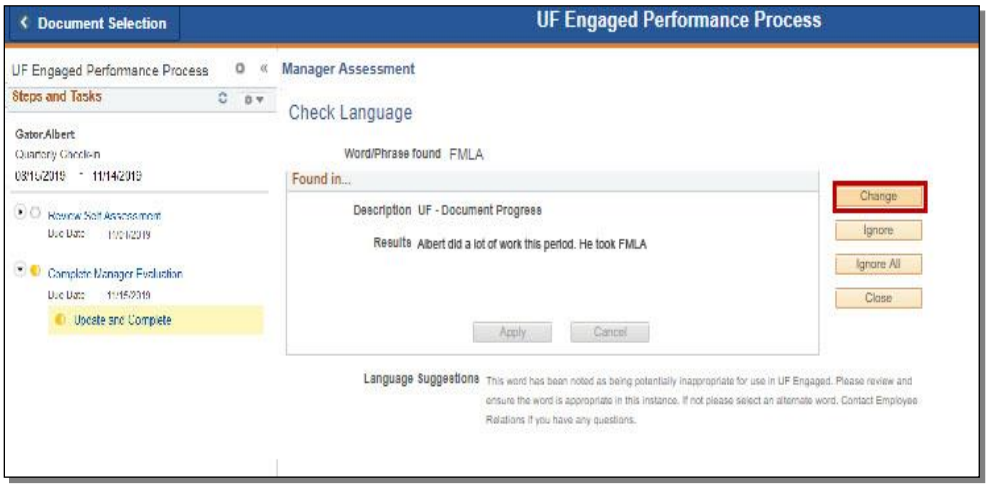
8. Click **Check Language**.



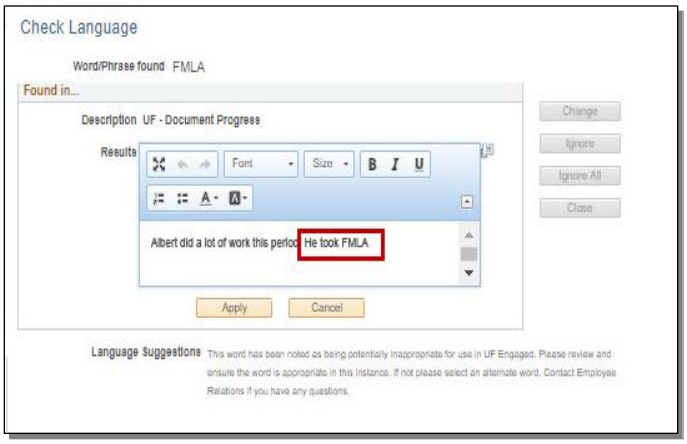
9. The Check Language function has identified the word **FMLA** as potentially inappropriate for a Check-in. If a word is flagged by the Check Language tool, you can change your word choice by clicking the **Change** button.

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.

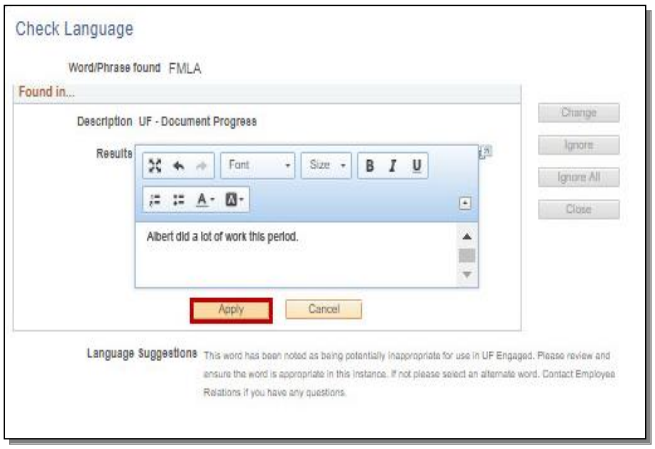
If you have questions or concerns about words identified by the Check Language tool, please contact your department Human Resources representative.



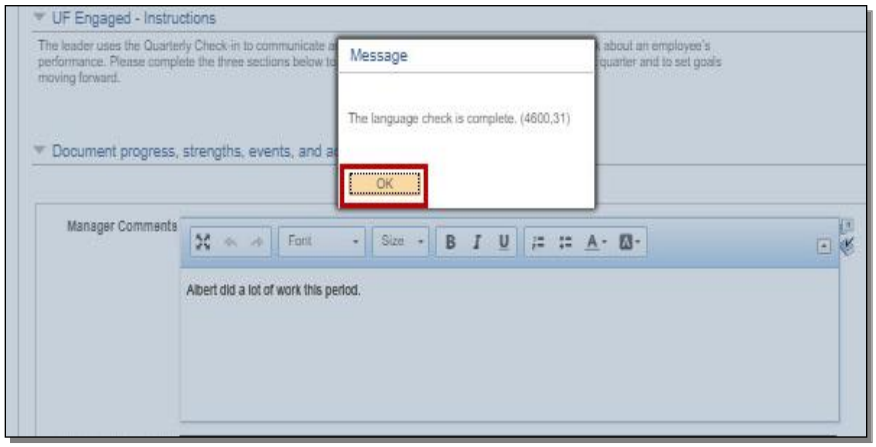
10. A text editor will appear. You will need to make adjustments as appropriate. In this example, the sentence **He took FMLA** will be deleted.



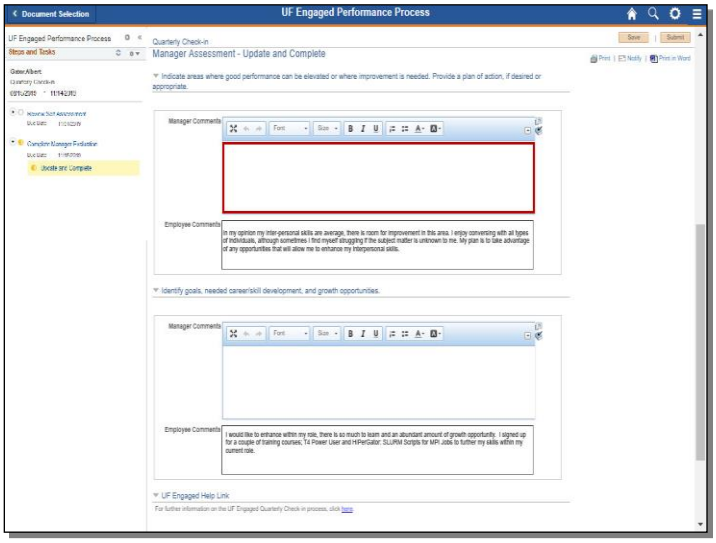
11. Click the **Apply** button.

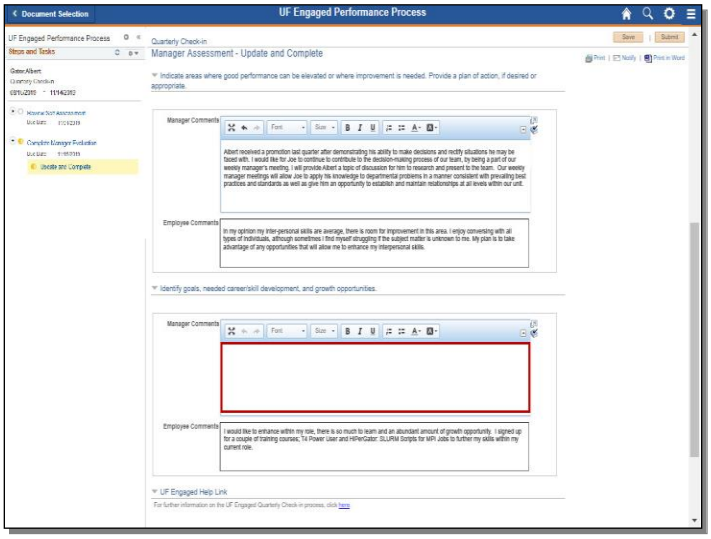


12. The language has been modified. Click the **OK** button.

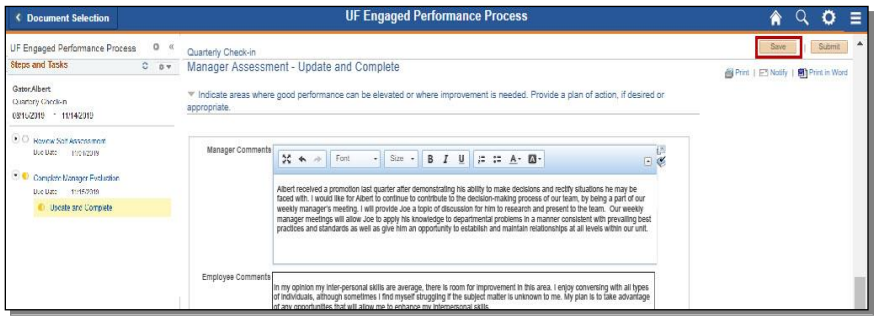


13. Next, scroll down and fill out the second and third **text entry fields**.





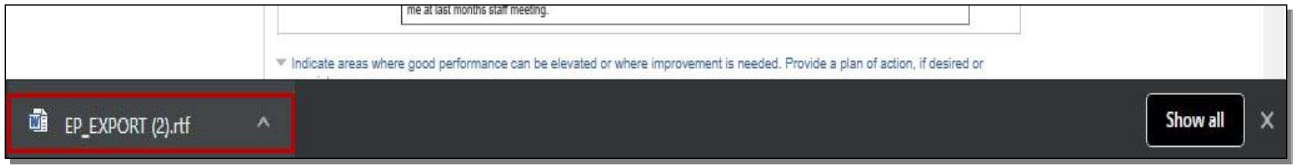
14. At any point while filling out the Check-in, you can save your progress by clicking the **Save** button. If you save your progress, you can exit the page and return to add more information later. Click the **Save** button to continue.



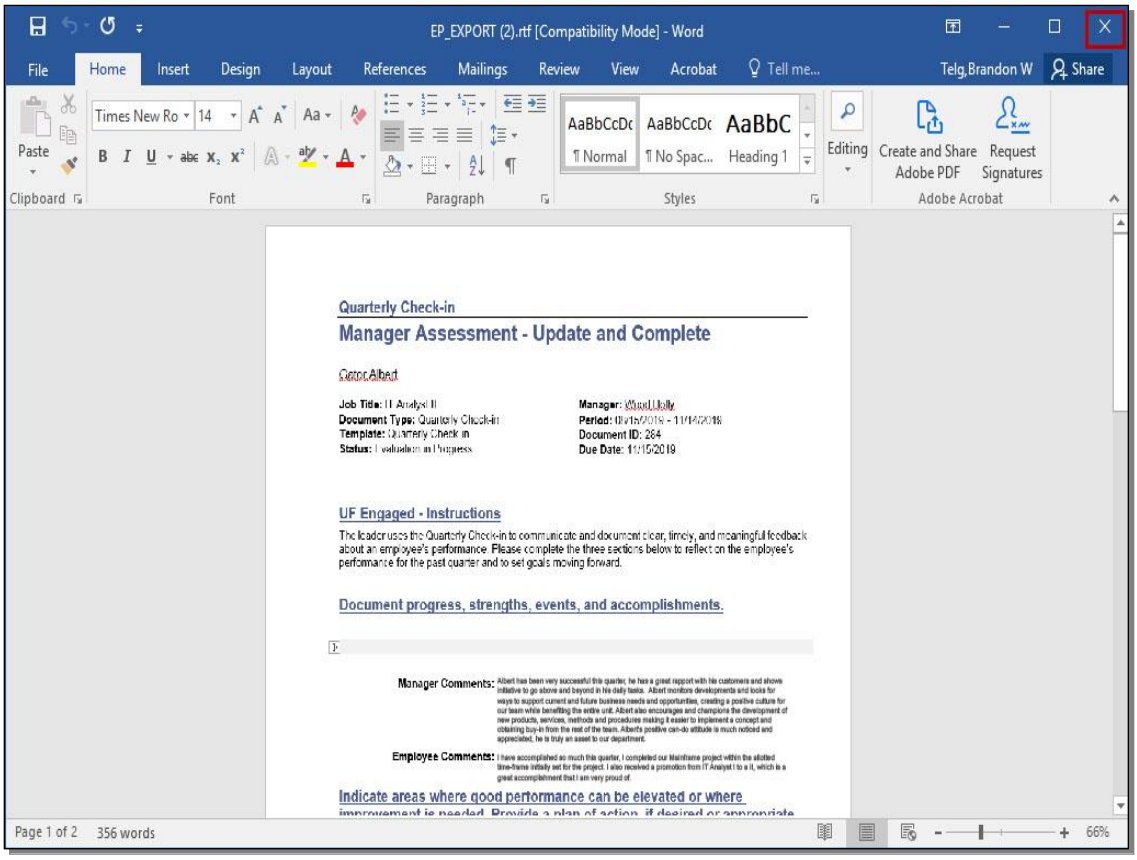
15. Once you have saved your Check-in, you can **Print in Word**. This function creates a Word Document version of the Check-in. Click **Print in Word**.

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.

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



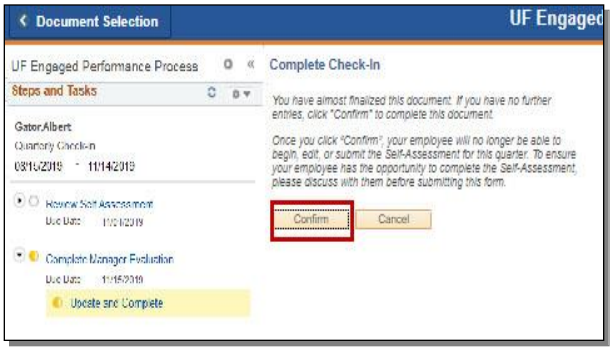
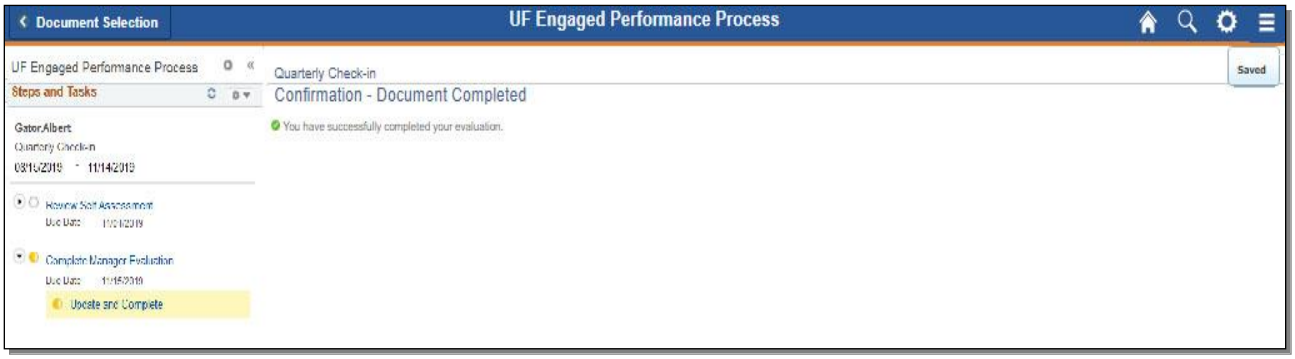
17. This document can be saved for your records. Click the **Close** icon to continue.



18. 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.

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



20. You have successfully completed the Check-in.