

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The following instructions will walk you through how to access Check-ins through Current Documents, Historical Documents, and View-Only Documents.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

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### CURRENT PERFORMANCE DOCUMENTS

The **Current Performance 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
- Semi-Annual Check-in
- Special Perf Improvement Plan

#### Document Status:

- Evaluation in Progress
- Approval

#### Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

First Name <input type="text"/>	Last Name <input type="text"/>
Document Type <input type="text" value="Six Month Probation Check-in"/>	Document Status <input type="text"/>
Period Between <input type="text"/> - <input type="text"/>	

#### Documents you own

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
43634551	Doe, Jane	Six Month Probation Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Analyst II	10/26/2024

## HISTORICAL PERFORMANCE DOCUMENTS

The **Historical Performance Docs** function enables you to view all *completed* or *cancelled* documents, including all those listed above and any historical check-ins that may be available, 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: Six Month Probation Check-in Document Status:

Period Between  -

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**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Rating
93511288	Gator,Albert	Six Month Probation Check-in	Completed	05/01/2024	10/31/2024	IT Special Projects Analyst	Successfully Completed

## VIEW PERFORMANCE DOCUMENTS

The **View Performance Documents** function enables you to view all historical documents related to the *direct* and *indirect reports* within your chain of supervision.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: 07/25/2024

**Doe, Jane's employees**

Select	Name	Empl ID	HR Status	Job Title	Department
<input type="button" value="Select"/>	Gator,Albert	93511288	Active	IT Special Projects Analyst	HR-TRAINING-DEVELOPMENT
<input type="button" value="Select"/>	Gator,Alberta	50873606	Active	IT Special Projects Analyst	HR-TRAINING-DEVELOPMENT

By default, you will see your direct reports. By clicking on the **Plus button**, you can see *their* direct reports. By clicking on the nested Plus buttons, you can continue to drill down and view more indirect reports.

**Doe, Jane's employees**

Select	Name	Empl ID	HR Status	Job Title	Department
<input type="button" value="Select"/>	Gator,Albert	93511288	Active	IT Special Projects Analyst	HR-TRAINING-DEVELOPMENT
<input type="button" value="Select"/>	Gator,Allie	47367810	Active	IT Special Projects Analyst	HR-TRAINING-DEVELOPMENT
<input type="button" value="Select"/>	Gator,Alberta	50873606	Active	IT Special Projects Analyst	HR-TRAINING-DEVELOPMENT