

Checkpoint – Manager

The Checkpoint phase is when the employee and manager meet to discuss performance year-to-date and adjust performance criteria, if needed. Commonly referred to as the “mid-point” meeting. Evaluation criteria will vary by institution and performance document. Follow the steps below as applicable to your document.

A reminder email will be sent seven days prior to the Checkpoint due date if both the manager and employee step are not completed.

Follow institution and manager recommendations for using this tool as part of the performance management process.

Review and Update Performance Criteria

Review the performance criteria located on each tab.

NOTE: Tabs may appear at different phases of the evaluation process.

1. Add or Edit **Goals**.
2. Enter **Manager Comments** for each performance criteria item and for the overall Section Summary to document progress.
WARNING: Copying and pasting from another document may cause issues with punctuation.
 - Formatting tools are available above the comment box.
 - Spell Check is available using the book and check icon.
3. Click **Save**.
NOTE: When saved, the employee will be able to immediately see the performance criteria updates, but not the Manager Comments.

Share with Employee

The employee will be unable to see comments entered by the manager until the manager clicks the Share with Employee button.

1. Click **Share with Employee** button in the upper right corner, after all comments have been entered.
2. Click **Confirm**.
NOTE: An email is sent to the employee letting them know the document is ready for their review.
3. Continue to add comments, which are visible to the employee, until the Checkpoint is complete.
NOTE: If you no longer wish to allow the employee to see comments, click **Stop Sharing**. If you stop sharing, you must share comments again with the employee to finalize the Checkpoint.

Review with Employee

When the employee has finished entering comments and clicks the Share with Manager button an email is sent to the manager, until this time the manager will be unable to see employee comments.

1. Click the **Review with Employee** hyperlink under Checkpoint in the Steps and Tasks pane on the left.
2. Review the Employee Comments for each performance criteria item and Section Summary, if applicable.
 - If the Employee Comments sections says, “Employee has either not commented or has not shared their comments”, the employee has not clicked the Share with Manager button.
 - If the message box is empty, no comments were entered by the employee for this item.

3. Once the review has been completed, click **Complete Checkpoint**
4. Click **Confirm**.

Skip Checkpoint

There may be rare circumstances when a Checkpoint is not being completed.

1. Click **Skip Checkpoint**.
2. Click **Confirm**.