

# Reopening a Completed Step

These steps can be completed by a manager or HR administrator.

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

## Release to Employee During Define Criteria

**NOTE:** If the employee needs to update performance criteria (i.e. goals) after they have clicked the Ready for Manager Review button, but before the manager Approves the criteria, the document can be re-opened by the manager.

1. Click the **Release to Employee** button in the upper right of the Performance Management document.
2. Click **OK** to confirm.

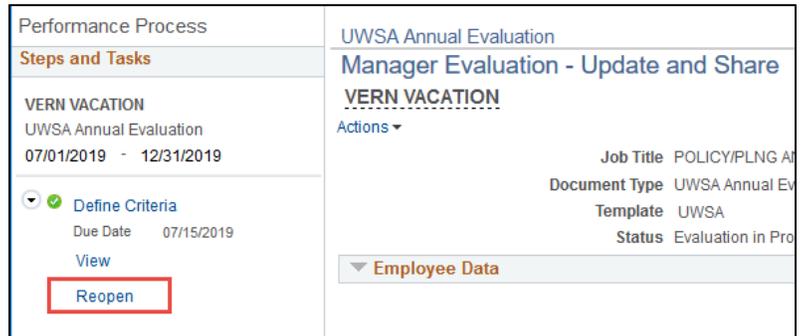


## Reopen Step

**WARNING:**

- Define Criteria, Checkpoint and Finalize Criteria steps can be temporarily reopened by the manager only until the next step has been updated and saved.
- If a Checkpoint is reopened, manager and employee comments are no longer shared, and the Share button must be clicked again.

1. Click the **Reopen** hyperlink under the appropriate step in the Steps and Tasks pane on the left side of the screen.



2. Click the **Reopen** button in the upper right.
3. Click **Confirm**.
4. Reload the page.

**NOTE:** To allow an employee to make edits to Define Criteria, use the above process to Release to Employee.