

Checkpoint – Employee

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

1. Review the performance criteria located on each tab.
NOTE: Tabs may appear at different phases of the evaluation process.
2. Add or Edit **Goals**.
3. Enter **Employee 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 at the top of the comment box.
 - Spell Check is available using the book and check icon.
4. Click **Save**.
NOTE: When saved, the manager will be able to immediately see the performance criteria updates, but not the Employee Comments.

Share with Manager

The manager will be unable to see comments entered until the Share with Manager button is pushed.

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

Review Manager Comments

An email will be sent when a manager clicks the Share with Employees button. The employee will be unable to see comments entered by the manager until the manager clicks the Share with Employee button.

1. Click the **Review Manager Comments** hyperlink under Checkpoint in the Steps and Tasks pane on the left.
2. Review the Manager Comments for each performance criteria item and Section Summary, if applicable.
 - If the message “Manager has either not commented or has not shared their comments” appears in the comment box, the manager has not yet shared their feedback.
 - If the message box is empty, no comments were entered by the manager for this item.