



Overview/Description

This document provides step-by-step instructions on how to navigate to the **Finalize Criteria** step for managers and employees on the **Performance Process** page. This page is used to finalize any progress, updates, or changes discussed with employee for the Performance Process. It is recommended to create overall goals for the employee prior to completing an annual assessment document.

Prerequisite(s)

Complete Checkpoint 1.

Instructions

Finalize Criteria for Performance Process Page


Finalize Criteria allows the manager and employee to review the performance criteria and make any necessary changes before starting the Performance Evaluation. The process starts with the manager completing the checkpoint set in the process. Managers have the following options for checkpoints:

- Save
- Skip Checkpoint
- Share with Employee

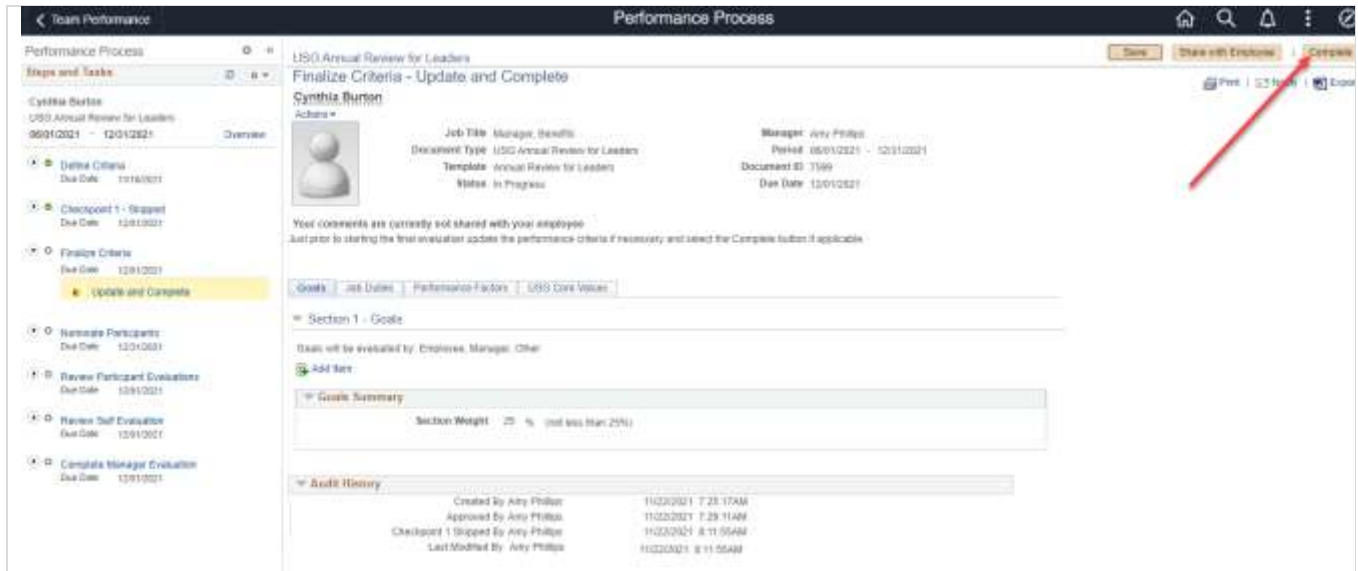
Navigation

Manager Self Service > Team Performance > Current Documents

1. Manager and/or employee **Finalize Criteria** by reviewing and making changes as needed.

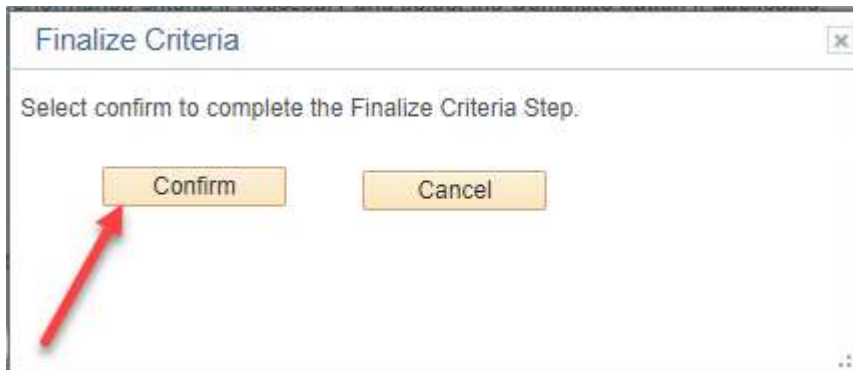
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next D
 Briana Mizrahi Student Assistant	USG Annual Review for Leaders	Define Criteria	06/01/2021 01/31/2022	12/17/2
 Cynthia Burton Manager, Benefits	USG Annual Review for Leaders	Track Progress - Checkpoint 1	06/01/2021 12/31/2021	12/01/2
 Briana Mizrahi Student Assistant	USG Annual Review for Leaders	Define Criteria	06/01/2021 12/31/2021	10/02/2

Managers have the options to Skip or Share the checkpoint. It is highly recommended to share the checkpoint with the employees so that the process can continue.



2. Once the criteria has been updated and changes are made, the manager clicks Complete.

The manager will click **Confirm**.




3. View of **Finalize Criteria** once complete.



Finalize Criteria - Completed

USG Annual Review for Staff
Finalize Criteria - Completed

Actions ▾



Job Title Employee Relations Manager
Document Type USG Annual Review for Staff
Template KSU Annual Review for Staff
Status Completed

Manager [Redacted]
Period 01/01/2019 - 11/30/2019
Document ID 1219
Due Date 10/31/2019

Goals | Performance Factors | USG Core Values | Institutional Values

Section 1 - Goals

Goals Summary

Section Weight	25 %
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Audit History

Created By	[Redacted]	07/31/2019 3:21:57PM
Approved By	[Redacted]	08/06/2019 10:42:07AM
Checkpoint 1 Completed By	[Redacted]	08/06/2019 12:07:27PM
Criteria Finalized By	[Redacted]	08/06/2019 12:18:01PM
Last Modified By	[Redacted]	08/06/2019 12:18:01PM

- The option to **Reopen** displays, if you have completed the established **Finalize Criteria** process.

< Team Performance
Performance Process

Performance Process ⚙️ <<

Steps and Tasks 🔄 ⚙️ ▾

Cynthia Burton
USG Annual Review for Leaders
06/01/2021 - 12/31/2021 Overview

- ✔ Define Criteria
Due Date 11/16/2021
- ✔ Checkpoint 1 - Skipped
Due Date 12/01/2021
- ✔ Finalize Criteria
Due Date 12/01/2021
[View](#)
[Reopen](#)

USG Annual Review for Leaders

Confirmation - Criteria Finalized

✔ You have successfully completed the Finalize Criteria Step.

- Click this button to reopen a criteria document that you have previously completed. **Note:** A criteria document cannot be reopened after the next step has been started and saved, or a pending nomination is accepted.