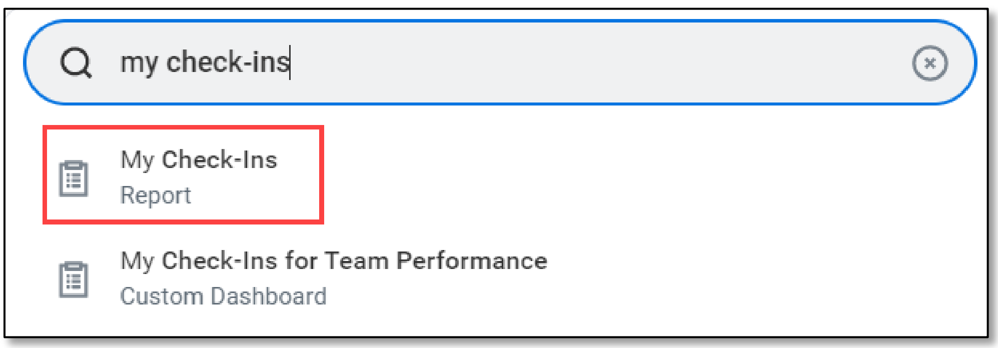
Check-In

As part of the performance accountability and feedback (PAF) model, managers will use Workday's Check-in feature for documenting the employee's goals and performance expectations, as well as each quarterly feedback meeting.

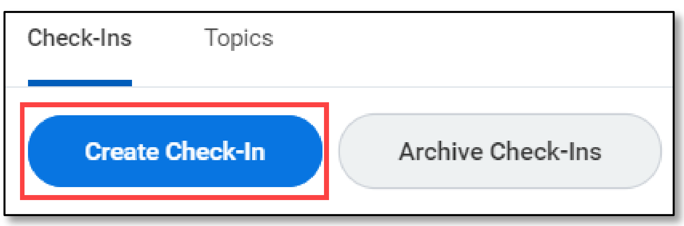
The quarterly check-ins replace the yearly performance evaluation process for supervising managers. To determine your 12-month cycle review the PAF Checklist for more information.

All the information entered into the Check-in feature in Workday can be requested via a public records request. Make sure to only document factual information. Do not include personal editorials.

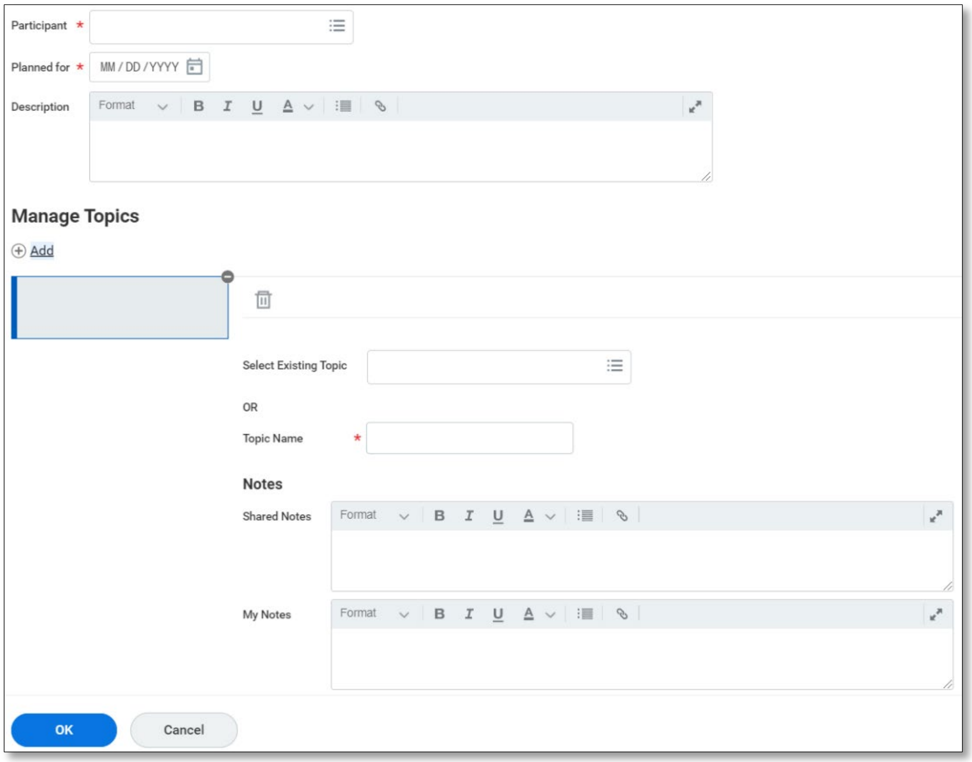
Step 1: In the search bar, type in 'My Check-Ins'. From the drop down, click on 'My Check-Ins'.



Step 2: Click on **Create Check-In**.

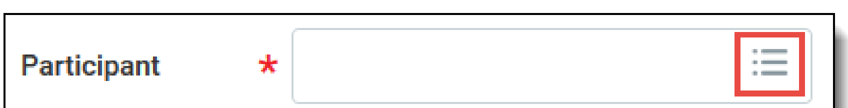


This is the full screen for the Check-in feature in Workday. The rest of the steps will guide you through the process of filling out each individual field.



A manager is required to conduct four quarterly check-ins with all their employees and document those conversations in Workday for every 12-month cycle. At the beginning of each 12-month cycle a manager needs to create a check-in documenting the performance expectations and goals for the year. Once the check-in is created and saved, the employee will be notified to review the information.

Step 3: In the *Participant* field, click on the menu **prompt** to search and select the employee you met with for the quarterly performance feedback meeting.



Note: You can create a quarterly check-in *before* a meeting takes place. You create the new check-in, identify what will be covered in the meeting, save it, and update what was covered after the meeting.

Step 4: The *Notify Participant* field will be checked by default. Leave this selected to ensure your employee receives a notification of the Check-In in Workday and via an Outlook email.

	Note: The employee will receive an email notification after you create the Check-in. A notification icon will also appear on their Workday Homepage. The employee can view the check-in by clicking on that icon. 

Step 5: In the **Planned for** date field, add the date the meeting occurred or will occur.

	Make sure the 'Planned For' date is consistent with the quarter you are performing the Check-in. See the chart below to determine 'Planned For' dates based on the date ranges for the different quarters. **If you need to edit the 'Planned for' date, see page 11 of this job aid.**

Performance Observation Period *The manager will monitor and observe employee performance during these months.*	**Check-in Meeting** *Manager to hold check-in meeting to discuss quarterly performance in the month after each quarter.*	**Planned For Date** *After each meeting, manager to document in Workday the check-in and make sure the 'Planned For' date is between the following dates.*
January – March	April	April 1 – April 30
April – June	July	July 1 – July 31
July – September	October	October 1 – October 31
October – December	January	January 1 – January 31

Step 8: This step covers the information the manager should document in the description field for the yearly planning check-in, the quarterly feedback meetings, and the final performance feedback meeting.

To determine your 12-month cycle, review the [PAF Checklist] for more information.

Yearly Planning Check-in

For the yearly planning check-in, you will create a check-in documenting the employee's performance expectations and goals for the 12-month cycle. The manager and employee should discuss any changes to the PD, the performance expectations, and identify/agree on goals for the year. This can be done in a meeting, via email, or through the shared notes in the check-in. In the Performance Accountability and Feedback online training we covered how to take the description of duties from the employee's position description to develop performance expectations and measures.

In the description field add the following information:

- On the first line, type in the month and year the performance expectations are for.
- Next, add each performance expectation. Performance expectations should be written for each key area of responsibility as outlined in the employee's PD. Focus on the key responsibilities or functions of the position having the greatest importance; it is not necessary to write expectations for every key responsibility or function. A good rule of thumb is somewhere between 4 or 5 expectations for each 12-month cycle.

Below is an example of what you would add in the description field.

Normal

Yearly Performance Expectations for April 2022 – April 2023

Performance Expectation #1
Consistently shares information that is accurate and complete; handles sensitive information appropriately.

Performance Expectation #2
Represent the agency on various committees and task forces to provide effective subject matter consultation.

Performance Expectation #3
Provides consultation and technical assistance to members of the public.

Performance Expectation #4
Monitors proposed legislative concepts to identify impacts to program.

Quarterly Performance Feedback Meetings

For each quarterly feedback meeting, the manager and employee will meet to discuss performance expectations, performance goals (if needed), developmental goals, and other quarterly business. Not all the expectations and goals need to be covered at these meetings, just what the employee has been focused on during the current quarter. You will document what was discussed in the description field.

Below is an example of what you would add in the description field for the second quarter.

Description

Format B I U A

2022 Q1 Performance Feedback Meeting

The following items were discussed:

- Discussed Tia's progress on her goal to improve her skill level in analyzing program data to make better program decisions. She has completed an advanced class in Excel and has completed a data analysis and visualization class.
- Tia provided an update on the reporting system upgrade project she is leading and to date all project milestones have been met. Also, discussed the potential risk of losing a key person on the team due to other workload demands. We identified some potential strategies to mitigate this risk.

Final Performance Feedback Meeting

For the final quarterly meeting of the 12-month review cycle, you will meet with your employee to do a final review of the year looking at the performance expectations, performance goals (if needed), developmental goals, and successes/achievements for the year. Below is an example of what you would add in the description field.

Description

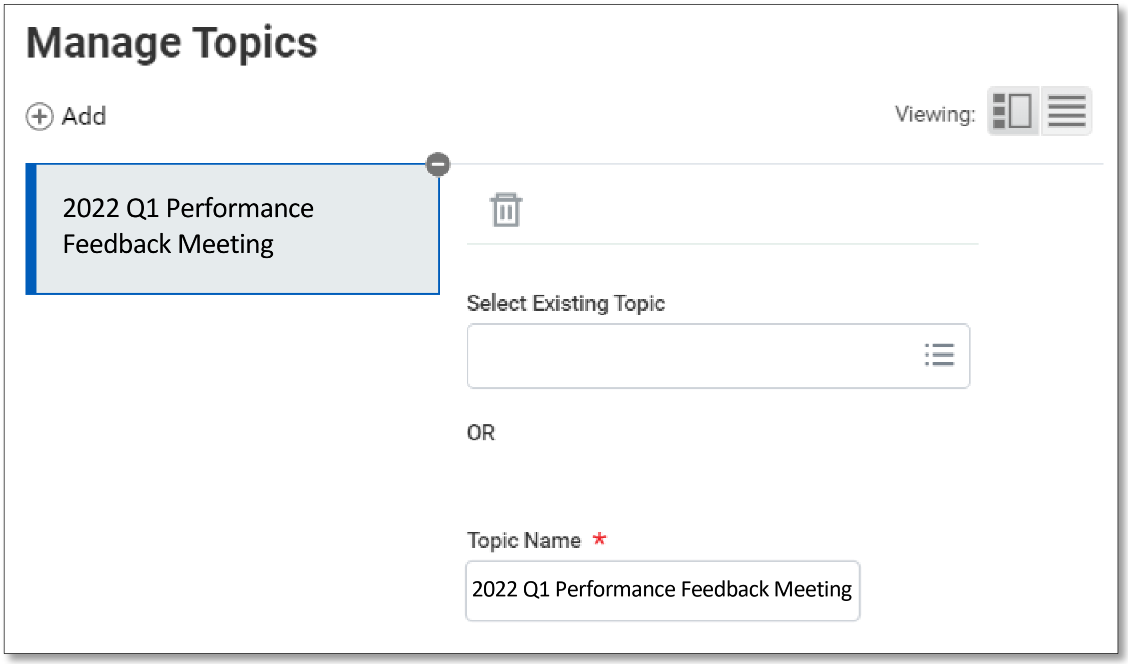
Format B I U A

2022 Q4 Final Performance Feedback Meeting

The following items were discussed:

- Tia consistently met all her performance expectations that were established for the year.
- Tia met her goal of improving her skill level in analyzing program data.
- Tia, along with the project team, successfully implemented the reporting system upgrade project.

Step 6: Add an Existing Topic if you already have them created. Otherwise add a new **Topic Name**. The Topic Name is essentially the title for your check-in.



In order to easily identify what year and quarter the check-in is for, it is suggested that these naming conventions are used for the topics you create.

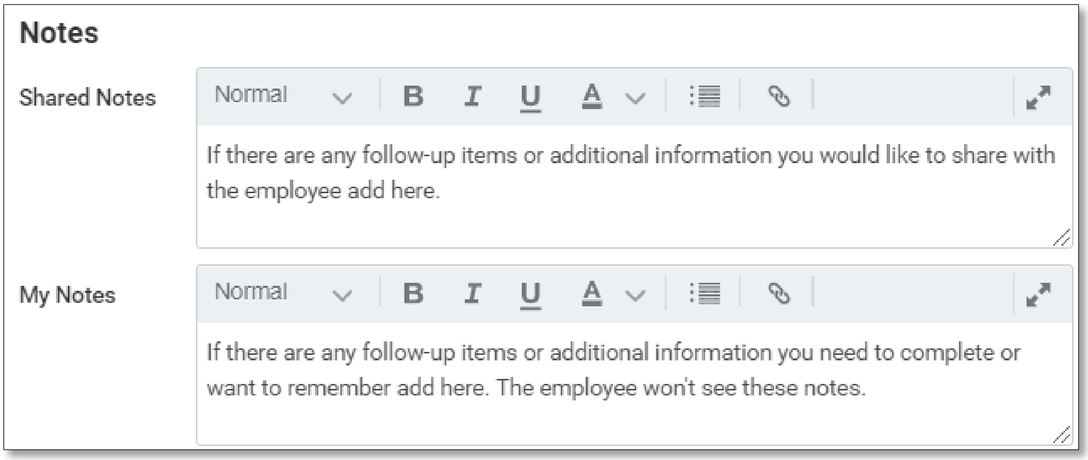
- **Yearly Planning Check-in**: For the yearly planning check-in, name the Topic *Year Yearly Planning Check-in* (e.g. 2022 Yearly Planning Check-in).
- **Quarterly Feedback Meetings**: For all the quarterly feedback meetings, name the Topic *Year Q# – Performance Feedback Meeting* (e.g. 2022 Q1 – Performance Feedback Meeting or 2022 Q2 – Performance Feedback Meeting, etc.).
- **Final Performance Feedback Meeting**: For the final feedback meeting, name the Topic *Year Final Performance Feedback Meeting* (e.g. 2022 Final Performance Feedback Meeting).

****IMPORTANT****

The quarterly feedback cycle does not follow a standard calendar year or a fiscal year. A managers quarterly check-in cycle for each employee will depend on either the manager's position start date or the employees position start date. To determine your 12-month cycle review the PAF Checklist for more information.

	If you need to edit a Topic Name, see page 8 of this job aid.

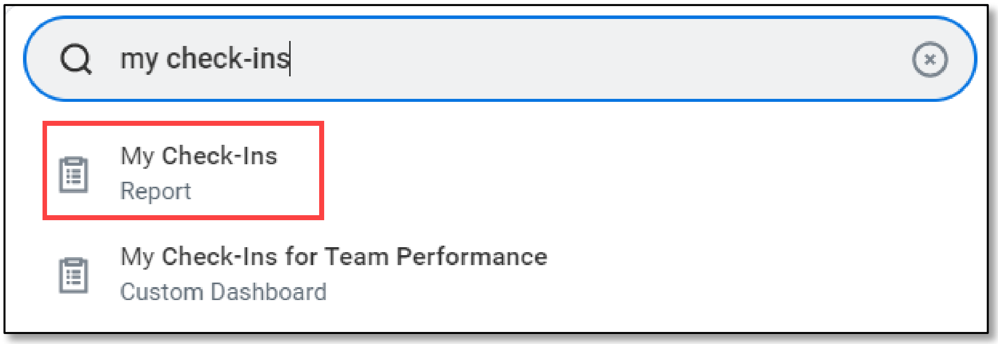
Step 7: *Shared Notes* can be seen by you and the employee. *My Notes* can only be seen by you. Add any notes about the follow-up items or additional information you would like to share with your employee or keep in your personal notes. Again, please remember the public records law does apply. Keep the notes factual.



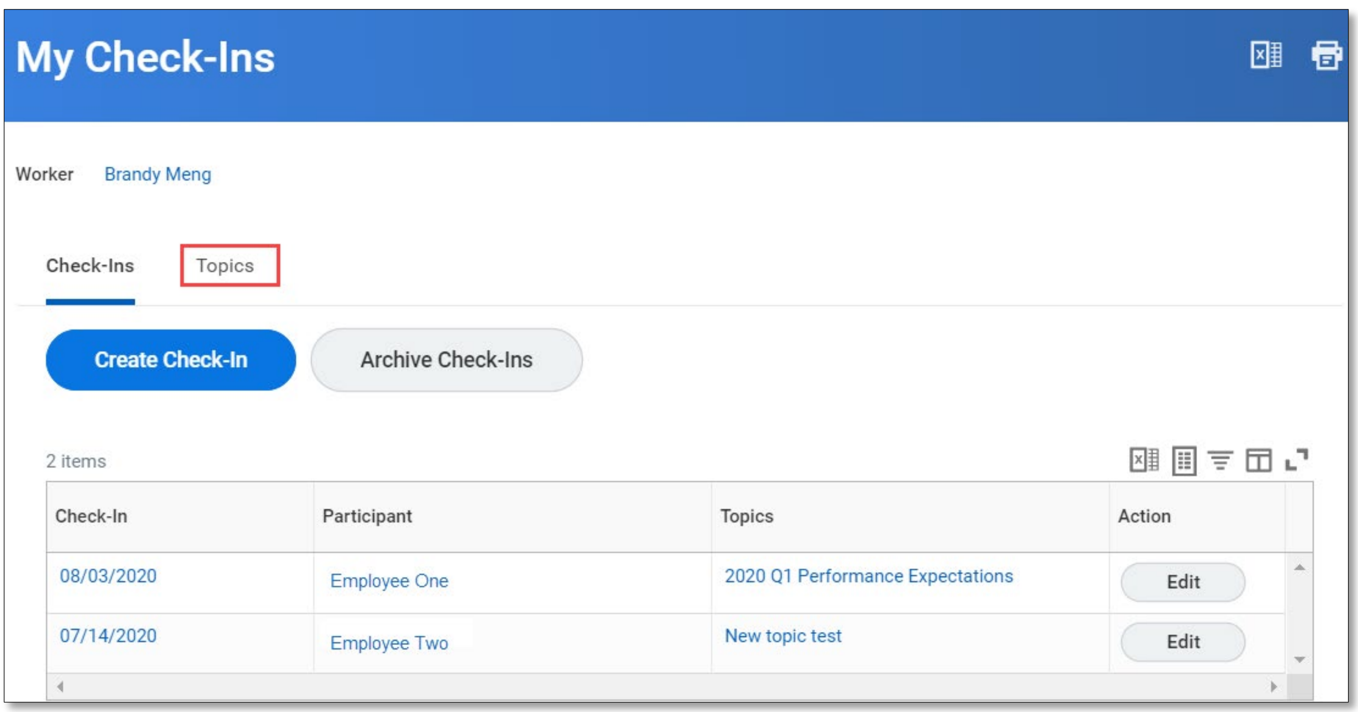
Changing the Topic Name

If you need to change the topic name you used in your check-in, complete the following steps.

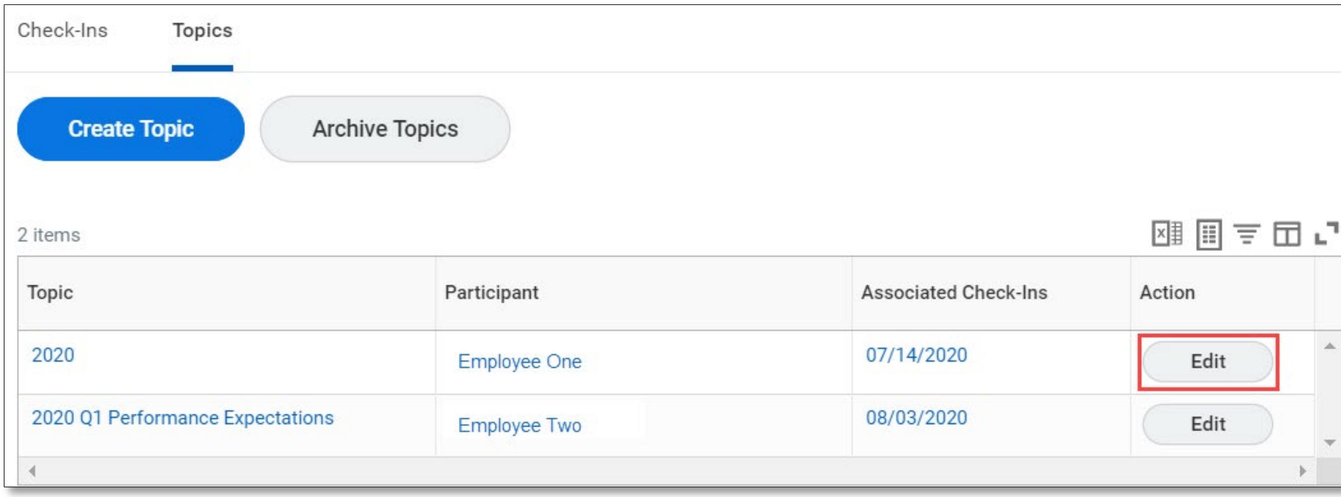
Step 1: In the search bar, type in ‘My Check-Ins’. From the drop down, click on ‘My Check-Ins’.



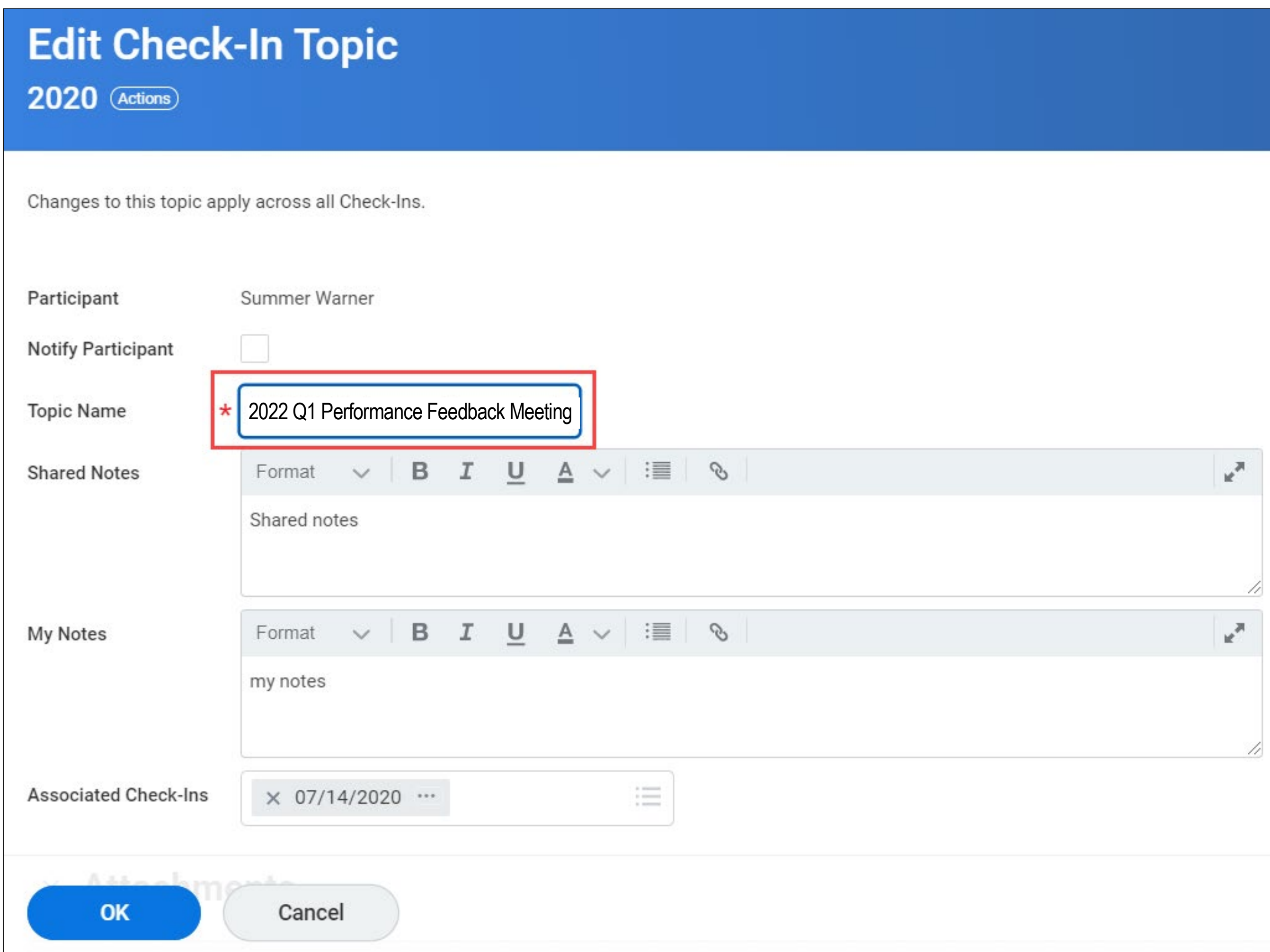
Step 2: Click on **Topics**.



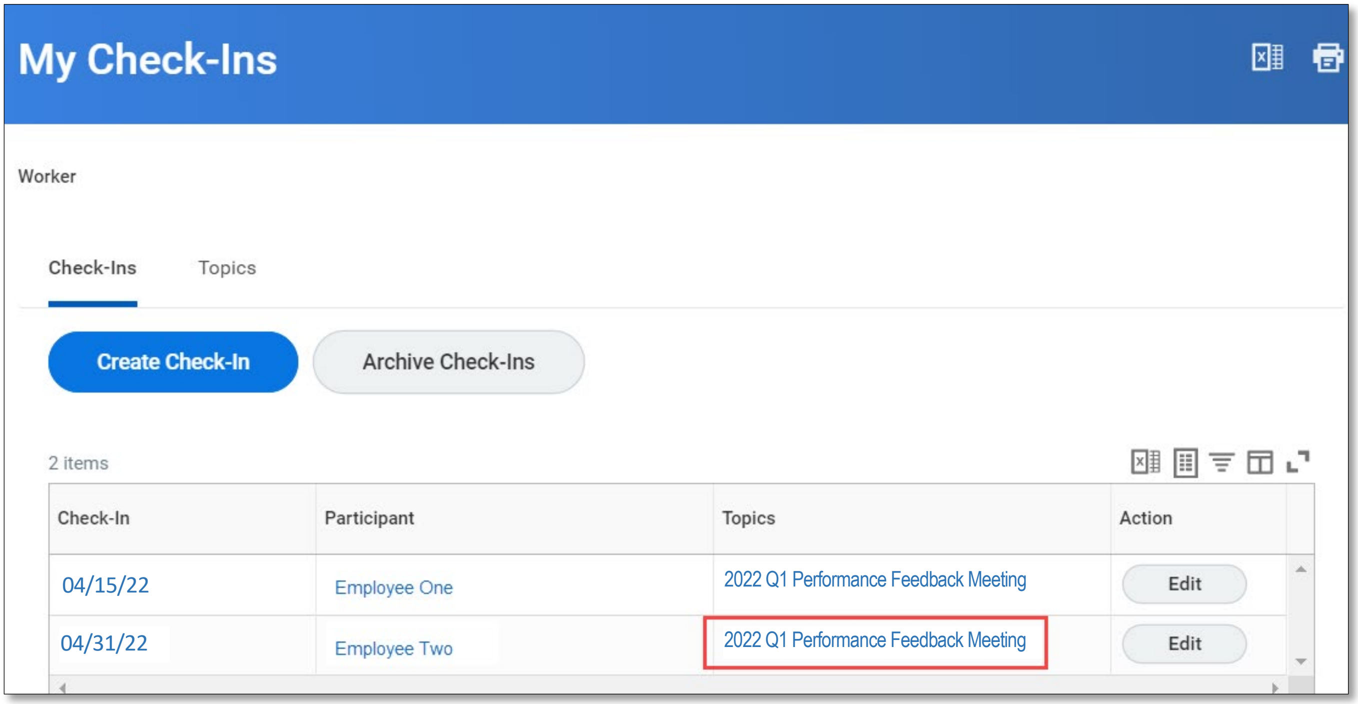
Step 3: Everyone's check-ins and topics will show. Click **Edit** for the topic you need to change.



Step 4: In the Topic Name field, type in the updated topic based on what type of check-in you did (see page 8 of this job aid for the topic names). For example, '2022 Q1 – Performance Feedback Meeting' and click **OK**.



Step 5: Once you click OK, you will be back at the My Check-in screen and you'll see the topic has been changed.



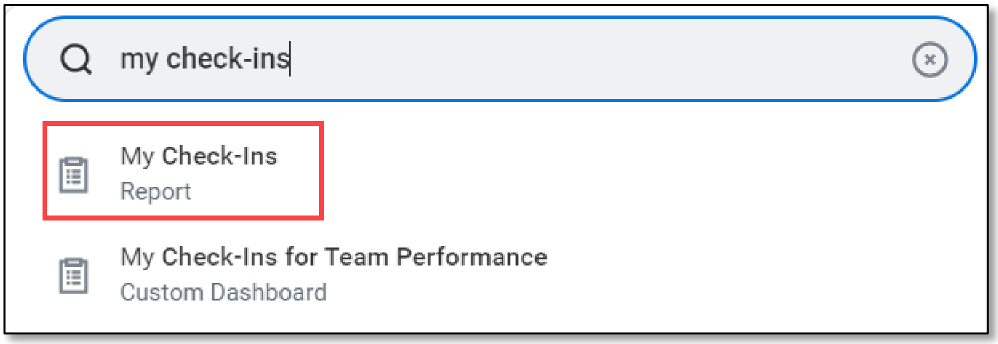
Changing the 'Planned For' Date

If you enter a 'Planned For' date that is outside of the range of the report, it will not correctly show-up in the Workday report. Make sure the 'Planned For' date is consistent with the quarter you are performing your employee check-ins. See the chart below to determine your 'Planned For' date based on the date ranges for the different quarters.

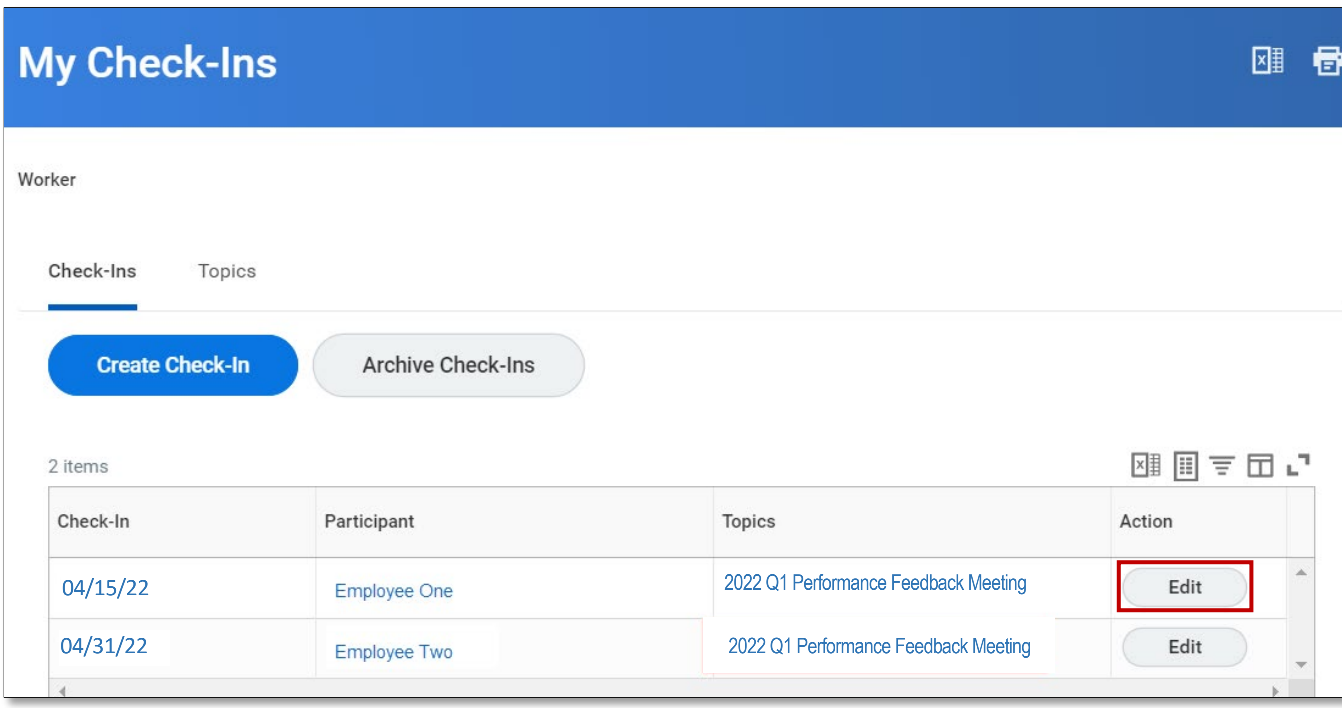
Performance Evaluation Period *Check-in is to discuss employee performance for each of the following quarters.*	**Check-in Meeting** *Manager to hold check-in meeting to discuss quarterly performance in the month after each quarter.*	**Planned For Date** *After each meeting, manager to document in Workday the check-in and make sure the 'Planned For' date is between the following dates.*
January – March	April	April 1 – April 30
April – June	July	July 1 – July 31
July – September	October	October 1 – October 31
October – December	January	January 1 – January 31

To change the ‘Planned For’ date, complete the following steps.

Step 1: In the search bar, type in ‘My Check-Ins’. From the drop down, click on ‘My Check-Ins’.



Step 2: All the check-ins you’ve created will show. Click **Edit** for the check-in you need to change.



Step 3: On the 'Edit Check-in' screen, go to the '**Planned for**' field and change the date to. Click **OK** to save the change.