Performance: Check-Ins

WHAT ARE CHECK-INS

Check-ins provide an easy way for managers and employees to prepare for and document notes during one-to-one meetings. This tool can also be used for performance check-ins.

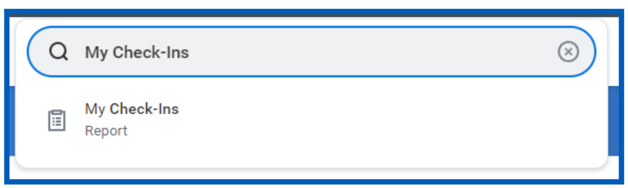
A check-in requires two participants:

1. the user who creates the check-in
2. the user who receives the check-in

Participants can create unlimited check-ins as long as each check-in has a **unique date**. Check-in dates can be in the past or in the future, providing flexibility to document past meetings or plan for future ones. Participants can change the date at any time.

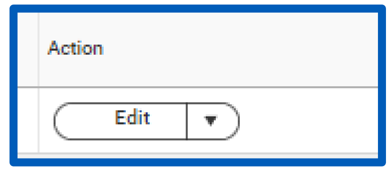
VIEW EXISITING CHECK-INS

From the Search menu, type Check-in and select **My Check-in** report.



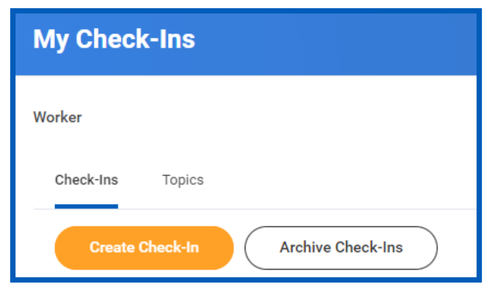
<u>**Note:**</u> If you are a manager, you can access **Team Performance** from your Workday homepage, and select **View Check-Ins** on the right side of the screen. As an employee, you can access **Talent and Performance** and view **My Check-ins** from the right side of the screen

Once you have identified the specific check-in, select the Edit button to view the contents within the check-in meeting (including notes and attachments).



CREATE A CHECK-IN

1. From the **My Check-Ins** screen, click **Create Check-In**.



2. From the drop-down menu, select the **Participant** you would like to have your check-in with.
3. Specify a **Planned for** date.
4. Check the box next to **Notify Participant** if you would like to inform the participant of the check-in or any edits to the check-in

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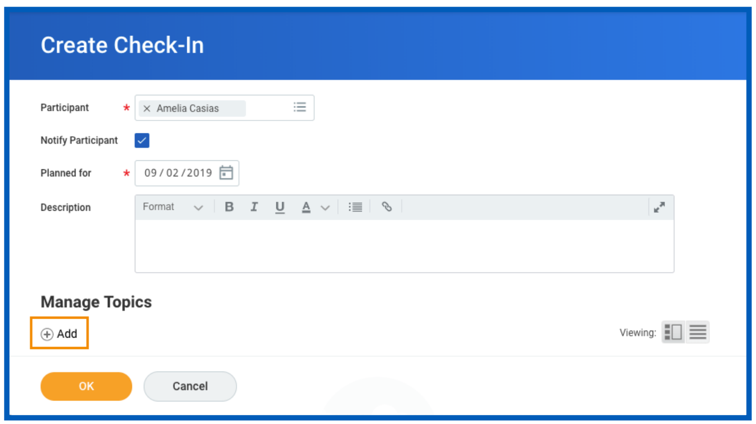
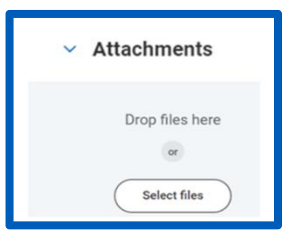
- The participant will receive a notification in Workday bell and can click on the notification to view the details.

- The participant will also receive an Outlook email if they have notifications turned on for check-ins. Refer to the Email Notification Settings job aid for additional details.

5. In the **Description** field, include any information about the details of the meeting



6. To attach any documents that will be available to you and the participant, click the **Select files** button. A pop-up box will appear and allow you to attach documents from your computer. You can also drag and drop files into the box by using **Drag files here**.



TOPICS

If you want to assign a specific topic to the check-in, click **Add**.

If you have participated in other check-ins with the identified participant, you can select from previous check-in topics under **Select Existing Topic**.

Note: If you previously conducted another check-in with the same topic, the dates of the associated check-ins will be listed with a hyperlink to those check-ins. If any of those check-ins had attachments, those will be also uploaded to the current check-in

Otherwise, you can enter a new **Topic Name**.

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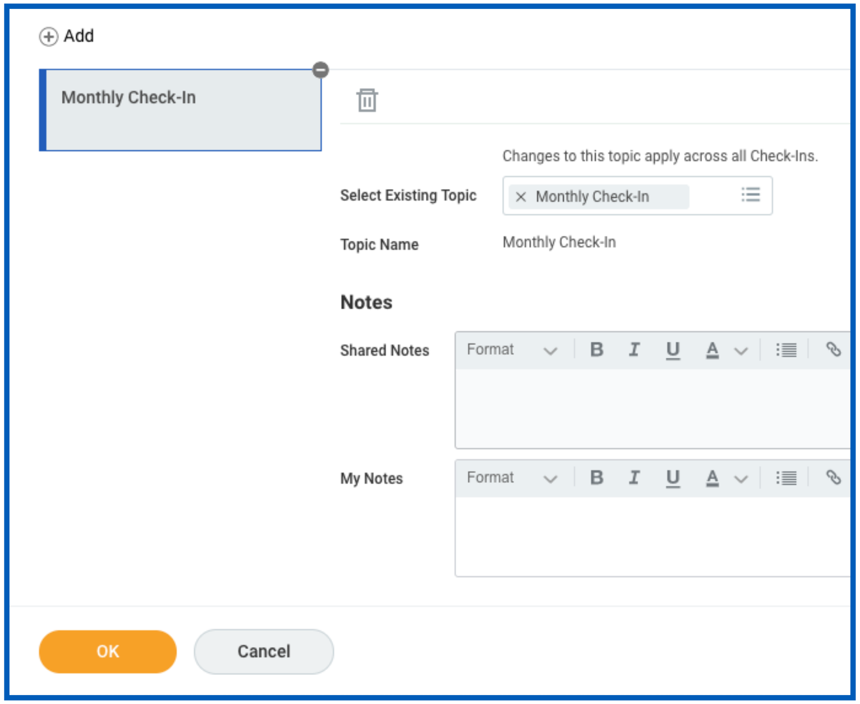
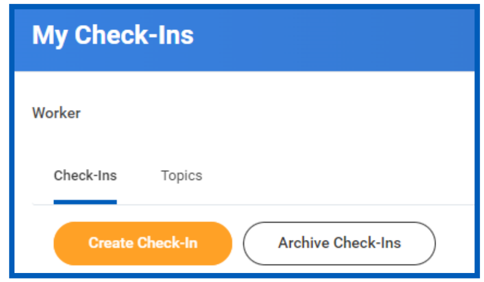


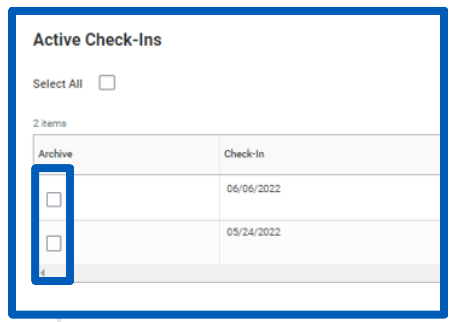
7. In the **Shared Notes** section, enter any notes you would like to share with the other participant.
8. In the **My Notes** section, enter private notes you would like to track that will only be visible to you.
9. To attach any documents that will be linked to the specific topic that will be available to you and the participant, click the **Select Files** button or **Drag Files here** option.
10. After adding your topic and any necessary notes or attachments, click **OK** to create the check-in.

ARCHIVE A CHECK-IN

1. From the **My Check-Ins** screen, click Archive Check-ins



2. From the Active Check-ins, check the box next to the check-in you want to archive and click **OK**



__Note:__ From the same screen, you can restore any previously archived check-ins and make them active again.