MANAGE CHECK-IN CONVERSATION

HR will initiate the **Check-In Conversation** process twice a year; however, managers may initiate the process on their own to record meaningful conversations that fulfill the check-in conversation requirement outside of the HR-defined timelines. See “Initiating a Check-In” step below. As necessary, goals should be adjusted, and managers should check that development activities are occurring. Any performance concerns should also be discussed during the **Check-In Conversations**.

Note: The **Check-In Conversation** is initiated by the employee in Workday.

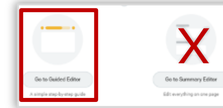
Conducting the Check-In Conversation

1. Schedule the **Check-In Conversation** with the employee.
2. Prepare for **Check-In Conversation** by reviewing what has occurred since the last performance conversation related to goals, development, and other activities. To view employee’s goals, see “Viewing Team/Employee Goals” step below.
3. Meet with employee to complete the **Check-In Conversation**. Prompt questions are displayed on the self-evaluation screen to aid managers in starting the discussion.

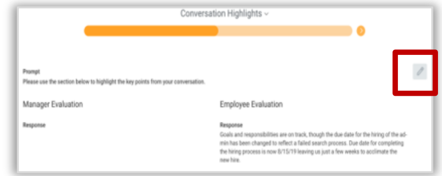
Completing the Check-In Conversation

Documented highlights should include clear expectations and action items to provide clarity for both employee and manager.

1. Following the **Check-In Conversation**, the employee returns to the **Inbox** task: **Self Evaluation: Check In Conversation.** The employee enters the conversation highlights sections noting key points with their comments about your conversation. The employee submits for manager review.
2. From your **Inbox**, select the review **Check-In Conversation** task. ***Note**: a box with the **Competency Definitions** may appear for your reference. Click **X** to close the box.*
3. Select **Go to Guided Editor** to review the conversation highlights entered by the employee. ***Note**: Do not select Go to Summary Editor. To begin again, click **Close** and re-select the **Inbox** item.*



4. The Manager Evaluation section is now available for the manager to enter comments. The Employee Evaluation is visible beside the Manager evaluation section.



   a. Select **Edit** to add the manager evaluation and response. Click **Save** to complete the manager response or **Undo** to discard comments.

5. Click Next.
6. Select one of the following options:

   a. **Submit**: A green check mark is displayed to mark the completion of the manager evaluation; employees can review your evaluation and response from the **Performance** application on their **homepage**.
   b. **Send Back**: Return submission to employee for revision, enter a reason (required).
   c. **Save for Later**: Save any changes made and leave the task in the manager **Inbox** to continue at a later date.
   d. **Close**: Exit the task without saving any changes. Task remains in your **Inbox.**

Initiating a Check-In Conversation

From the Workday **homepage**:

1. Enter ***Start Performance Review for Employee*** in the search box.
2. Select **Start Performance Review for Employee**

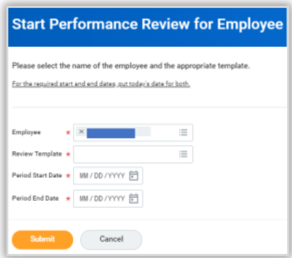
3. Enter the following information:

   a. **Employee***: Select the Employee Name

   b. **Review Template***: Select **Check-In Conversation**

   c. **Period Start Date***: Enter today's date

   d. **Period End Date***: Enter today's date



4. Click **Submit**. Once submitted the employee receives an **Inbox** task to complete the **Check-In Conversation** task.

Viewing Team/Employee Goals from your homepage

1. Type **My Team's Goals** in search bar on the Workday homepage.
2. Select appropriate Supervisory Org and View by **Worker**. Click **Ok.**

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