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. 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 started by the employee in Workday.

Participating in the Check-In Conversation

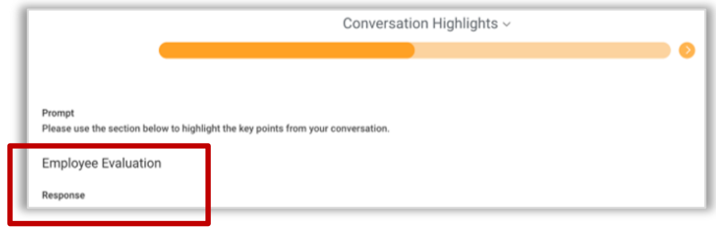
From the Workday **homepage**:

1. From the **Awaiting Your Action** Section, select the **Complete Self Evaluation: Check-In Conversation** task. **Note:** *If the task does not appear in this section, select the inbox icon in the top right corner of the homepage to view the task.*
2. Schedule the **Check-In** Conversation with the manager.
3. Prepare for **Check-In** Conversation by reviewing what has occurred since the last performance conversation related to goals, development, and other activities. To view goals, see “View Goals” step below.
4. Meet with your manager to complete the **Check-In** Conversation. ***Note****: Prompt questions are displayed on the self-evaluation screen to aid managers and employees in starting the discussion.*

Documenting 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**, return to **Awaiting Your Action/Inbox** task: **Self Evaluation: Check-In Conversation.** ***Note****: a box with the Competency Definitions may appear for your reference. Click X to close the box.*
2. Click the **Reponse** box or select **Edit** to enter your **Check-In Conversation** highlights noting key points and adding your comments. Click **Save** to complete your comments or **Undo** to discard.



3. Click **Next** Next to submit to your manager for review.
4. Your manager receives an **Inbox** task to review your **Check-In Conversation** notes and to enter their review and comments. The Employee Evaluation is visible beside the Manager evaluation section.
   a. Your manager can **Send Back** your submission for revision. You can edit your submission and resubmit for manager review.

Viewing the Check-In Conversation Manager’s Review

From the Workday **homepage**:

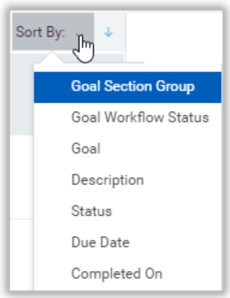
1. Click **View All Apps**.
2. Click the **Performance** application.
3. Select the **Check-In Conversation** from the list in the ***My Reviews*** section or select **Reviews** in the ***View*** section to see previous **Check-In Conversation** or performance reviews.

Performance

View Goals from your homepage

1. Click **View All Apps**.
2. Select the **Performance** application from the Workday homepage.

3. Click **Goals** from the ***View*** area.
4. From the **Individual Goals** tab, use the **Sort By**: drop down list on the left to view your goals by characteristic:
   - Goal Section Group
   - Goal Workflow Status
   - Goal
   - Description
   - Status
   - Due Date
   - Completed On



5. The List Detail View  (view selection buttons on the top right) presents a view of a single goal with left hand navigation to toggle between goals.

   Change to a Grid View  using the view selection buttons on the top right, to see all goals on one page.