

STEP BY STEP GUIDELINES FOR A PERIODIC CHECK IN

The screenshot shows the Workday home page. At the top right, there is a search bar with the text "simmie mcfadden". On the left side, there is a navigation pane with a blue header "Simmie McFadden" and "HR Coordinator". Below the header, there is a "Team" section with a "Start Performance Review" button. The main content area shows a list of tabs: "Individual Goals", "Archived Goals", "Development Items", and "Performance Reviews". The "Performance Reviews" tab is selected, and it shows a list of items with a "none entered" status.

MANAGER logs into the Workday home page and types name of employee in the Search bar.

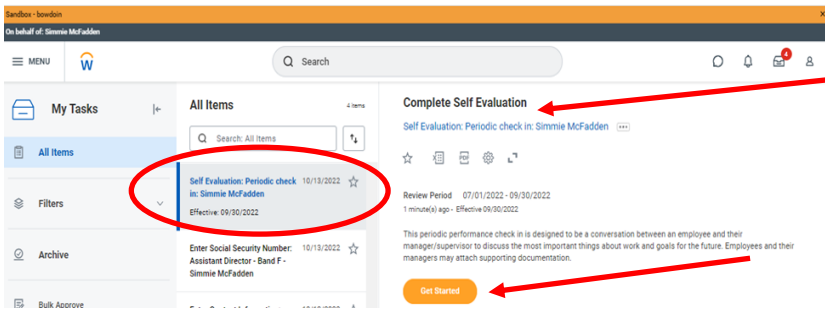
MANAGER clicks on Performance in the navigation pane and then clicks on START PERFORMANCE REVIEW.

MANAGER selects the template to be used for this employee's check in (initial **6 MONTH REVIEW** after date of hire or beginning of new job; **ANNUAL REVIEW** used in consultation with HR for a limited number of employees; or **PERIODIC REVIEW** suggested every 3—4 months for most employees). In this example, we are using the periodic check in.

The **MANAGER** indicates the start date and end date of the period being reviewed (GENERALLY 3—4 months). Click on SUBMIT.

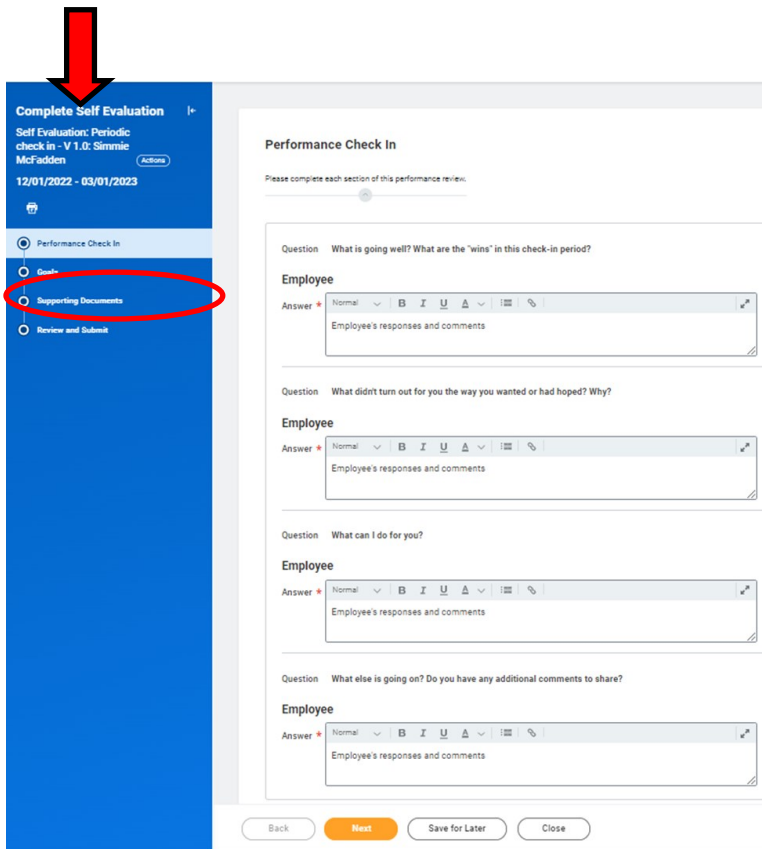
The screenshot shows the "Start Performance Review for Employee" form. The form has a title "Start Performance Review for Employee" and a description: "This Periodic Check In serves as a conversation between an employee and their manager about the most important aspects of their work and goals. The Period Start Date and Period End Date refer to the start and end dates of the period of work being discussed. Please answer all questions as completely as possible. Both the employee and manager may attach supporting documentation to this check in." The form has several fields: "Employee" (with a dropdown menu showing "Simmie McFadden"), "Review Template" (with a dropdown menu showing "By Type"), "Period Start Date" (with a dropdown menu showing "6 Month Review"), and "Period End Date" (with a dropdown menu showing "Annual Review"). There is also a "Periodic Review" option. At the bottom, there is a "Submit" button and a "Cancel" button.

The screenshot shows the "Start Performance Review for Employee" form with the following values: "Employee" is "Simmie McFadden", "Review Template" is "Periodic check in", "Period Start Date" is "07/01/2022", and "Period End Date" is "09/30/2022". There is a comment field with the text "enter your comment". At the bottom, there is a "Submit" button and a "Cancel" button.



EMPLOYEE will receive a notice in their inbox about a self reflection. When the employee clicks on the task, they can view the check in time period. Click the GET STARTED button to begin.

The blue navigation pane on the left side of the screen assists the **EMPLOYEE** in following the steps of the check in: answer the QUESTIONS for the check in, add personal and professional GOALS, attach any SUPPORTING DOCUMENTS, and REVIEW and SUBMIT to your manager.



CHECK IN QUESTIONS

The **EMPLOYEE** self reflects in the space provided — the space will expand if necessary as you type in the box.

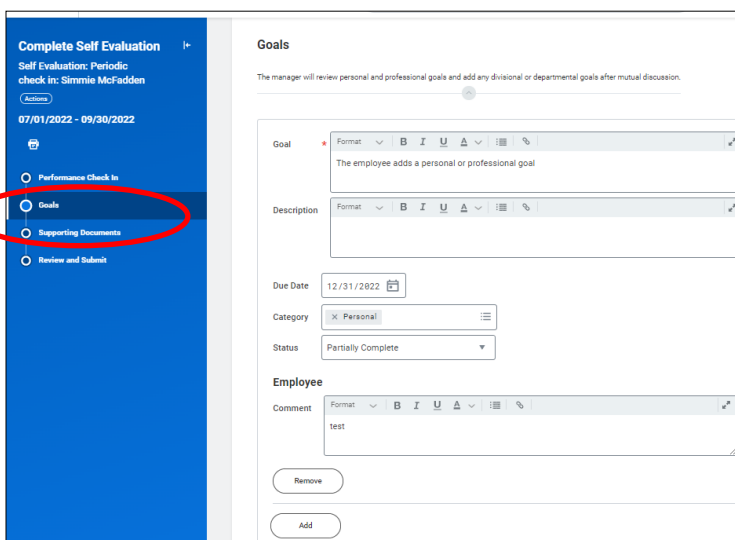
- What is going well? What are the "wins" in this check in period?
- What didn't turn out for you the way you wanted or had hoped? Why?
- What can I do for you?
- What else is going on? Do you have any additional comments to share?

It is important that you answer each question as honestly and completely as you can. Click NEXT. Be sure to attach any supporting documentation you wish to share with your manager.

GOALS

As an **EMPLOYEE** you can indicate one or more personal or professional goals .

1. Type in the name and description of your goal.
2. Assign a due date for completion of the goal.
3. Select a goal category (e.g., professional development, educational, etc.)
4. Add in the current status of your goal. Have you already started to work toward the goal, or not started yet?
5. Add any additional comments in the text box. Add any additional goals by following these same steps.
6. Add any supporting documentation if necessary.



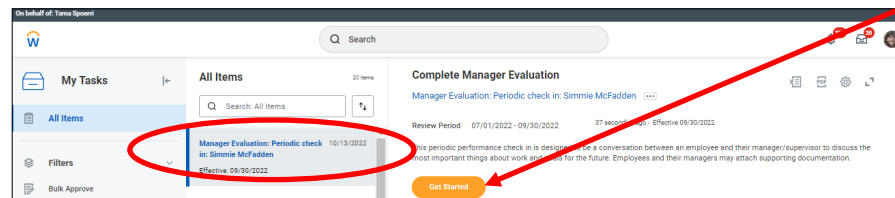
SUPPORTING DOCUMENTATION

The **EMPLOYEE** should attach any supporting documentation pertaining to the self-reflection or the goals that were entered. The easiest way is to upload .pdf documents from your computer or mobile device.

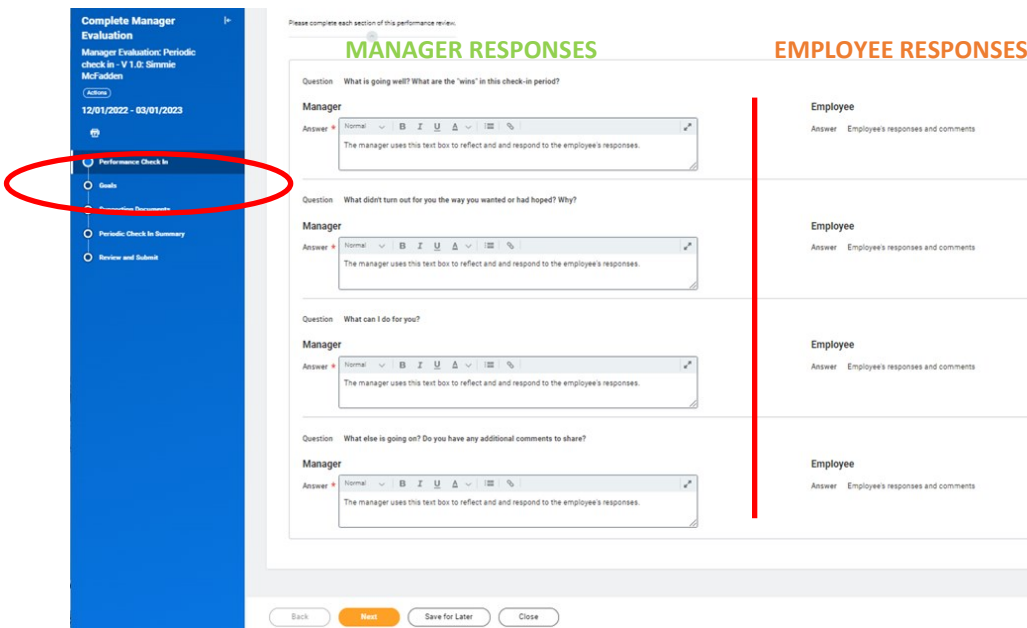
REVIEW AND SUBMIT

The last step is to review all of the information, **MAKE ANY EDITS IF NECESSARY**, and click on **SUBMIT** to send your check in to your manager.

The **MANAGER** will receive the check in responses the **EMPLOYEE** submitted as a task in their Workday inbox. Click on **GET STARTED**.



The **MANAGER**'s screen has the same navigation pane on the left and remainder of the screen is split: there are text boxes for the **MANAGER** to respond to the same questions as the **EMPLOYEE** whose responses are displayed on the right. The **MANAGER** has one additional question to answer, may add, remove, and/or edit goals, and attach supporting documents



Complete Manager Evaluation
Manager Evaluation: Periodic check in: Simmie McFadden
07/01/2022 - 09/30/2022

Periodic Check In Summary
Please assign an overall rating to this employee's performance for this most recent periodic check in.

Manager
Rating: Successful/Meets Expectations
Rating Description: select one
Exceptional Performance
Exceed Expectations
Successful/Meets Expectations
Needs Improvement
Inconsistent/Unsatisfactory

Review and Submit
Submit Send Back Save for Later

CHECK IN SUMMARY

After the **MANAGER** has completed the questions, they need to select a check in summary rating: Exceptional Performance, Exceeds Expectations, Successful/Meets Expectations, Needs Improvement, and Inconsistent/Unsatisfactory. The rating description will be displayed underneath the selection. The **MANAGER** should review all goals and any supporting documentation before clicking **SUBMIT**.

The **MANAGER** check in / **EMPLOYEE** self-reflection is automatically forwarded to a Human Resources Performance Partner for review. The Performance Partner can send the check in back to the **MANAGER** for edits if necessary. Once the check in is approved, the **MANAGER** will receive a task in their Workday inbox to schedule a performance review meeting with the **EMPLOYEE**.

My Tasks
All Items
Filters
Bulk Approve
Manage Delegations

Complete To Do [Schedule Performance Review Meeting](#)

46 second(s) ago - Effective 09/30/2022
For: [Simmie McFadden](#)
Overall Process: [Periodic check in: Simmie McFadden](#)
Overall Status: In Progress
Instructions: Please schedule a face to face meeting with your employee to discuss the contents of this check-in. You may print out a copy of the review in advance of and to prepare for your meeting. **Important:** Once you click Submit that you have completed the task of scheduling the meeting, the contents of this check in will be visible to the employee. Plan accordingly!! We recommend that you meet with the employee BEFORE you click this Submit button to avert unexpected employee access to the check in contents and comments.

When the meeting is planned, the **MANAGER** may print out a copy of the check in. **IMPORTANT!!** Once the **MANAGER** clicks **SUBMIT** that they have completed the task of scheduling the face to face meeting, the contents of the check in are immediately visible to the **EMPLOYEE**. The **MANAGER** may want to meet with the **EMPLOYEE** prior to clicking **SUBMIT** to prevent unexpected employee access to the check in contents and comments.

The **EMPLOYEE** will have a new task in their inbox to acknowledge the recent check-in and they can view and print the check in.

My Tasks
All Items
Filters
Archive

Provide Employee Review Comments
[Manager Evaluation: Periodic check in: Simmie McFadden](#)

Evaluated By: [Tama Spoerri](#)
Review Period: 07/01/2022 - 09/30/2022
26 second(s) ago - Effective 09/30/2022
This acknowledges that the employee met with their supervisor to discuss performance and the most important aspects of their work over the last few months.
[Get Started](#)

SUMMARY AND ACKNOWLEDGEMENT

The **EMPLOYEE** may review all of the contents of the check in including answers to questions, goals and comments, and any supporting documentation. Click on **NEXT** to move to the acknowledgement.

The **EMPLOYEE** may not agree with all of the aspects of the check in. so there are three different acknowledgements:

1. I have met with my supervisor to discuss my check in and have read and accept the accompanying comments.
2. I have met with my supervisor to discuss this check in and my most recent performance, but I would like to discuss further.
3. I refuse to sign my check in because I do not agree with my manager's assessment, but I acknowledge that I have received it.

After the **EMPLOYEE** submits their acknowledgement, the **MANAGER** also receives a task in their Workday inbox to acknowledge the check in. The **MANAGER's** acknowledgement status and Comments box is presented alongside the **EMPLOYEE** acknowledgement (just like the check in itself).

Either the **MANAGER** or **EMPLOYEE** can view and/or print the **GOALS** expressed in the check in, **DEVELOPMENT** items, or the check in itself—**PERFORMANCE REVIEWS**. Goals that have already been achieved are available in **ARCHIVED GOALS**.

In this example, a single goal was set in the check in between the employee and manager and details are available.

To view or create a printable PDF copy of the check in, click on the Performance Reviews tab and select VIEW or CREATE NEW PDF. You may receive a processing notification while the PDF copy is being created — this is normal, click on Notify Me Later. When the screen refreshes, click on the document in the Review PDF column.

Individual Goals Archived Goals Development Items **Performance Reviews**


Completed 1 Item

Review	Start Date	End Date	Manager Rating	
Periodic check in: Simmie McFadden	07/01/2022	09/30/2022	Successful/Meets Expectations	View Create New PDF

Your request is being processed
You can continue to wait or choose to be notified later.
[Notify Me Later](#)

Individual Goals Archived Goals Development Items **Performance Reviews**

Completed 1 Item

Review	Start Date	End Date	Manager Rating	Review PDF	
Periodic check in: Simmie McFadden	07/01/2022	09/30/2022	Successful/Meets Expectations	 McFadden, Simmie Periodic check in 10_13_2022.pdf	View Create New PDF

The final print version includes all portions of the check in including any goals, supporting documentation, comments, and acknowledgements.

McFadden, Simmie
Assistant Director - Band F
Manager: Tama Spoerni
Evaluated By: Tama Spoerni

Organization: Human Resources Location: Maine
07/01/2022 - 09/30/2022

Periodic Check In Summary

Manager Overall Evaluation
Rating: Successful/Meets Expectations

Acknowledgement

Manager
Entered by: Tama Spoerni Date: 10/13/2022
Status: I acknowledge that I have discussed this check in with my employee.
Comment: It is great to have you on my team!

Employee
Entered by: Simmie McFadden Date: 10/13/2022
Status: I have met with my supervisor to discuss this check in and my most recent performance but I would like to discuss further.
Comment: I appreciate meeting with you to discuss my performance.

Performance Check In

What is going well? What are the "wins" in this evaluation cycle?

Manager Evaluation
Response: The manager uses this text box to reflect on and respond to the employee's responses.
Additional Manager Evaluation

Employee Evaluation
Response: The employee answers each one of these questions in the check in form.

What didn't turn out for you the way you wanted or had hoped? Why?

Manager Evaluation
Response: The manager uses this text box to reflect on and respond to the employee's responses.
Additional Manager Evaluation

Employee Evaluation
Response: The employee answers each one of these questions in the check in form.

What else is going on?

Manager Evaluation
Response: The manager uses this text box to reflect on and respond to the employee's responses.
Additional Manager Evaluation

Employee Evaluation
Response: The employee answers each one of these questions in the check in form.

Personal or professional goal
Status: Partially Complete Completion Date:

PRINTING A PERFORMANCE REVIEW WHILE IT IS IN PROCESS (NOT FINALIZED)

Individual Goals	Archived Goals	Development Items	Performance Reviews
In Progress 1 item			
Review	Review Period		Status
Start Date	End Date		
Periodic check in: Cindy Bessmer	01/01/2022	09/30/2022	Review Complete Manager Evaluation

Employee and managers may craft their responses to questions outside of Workday and then copy and paste them in, or may respond directly in Workday. In order to print responses before the check in is completely finalized, follow these steps. Navigate to the Performance tab and locate the check-in in progress.

Click on the related actions ellipsis (...) next to the action in process to reveal another menu.

Click on the Talent tab to reveal the option "View Printable Employee Review."

When you click on the Printable option, you have the option of printing an Excel file or a pdf.

The screenshot shows the 'Employee Review' dropdown menu for 'Periodic check in: Cindy Bessmer'. The 'Talent' tab is selected, and the 'View Printable Employee Review' option is highlighted. The 'Excel' and 'PDF' icons are also visible.

The screenshot shows the 'View Printable Employee Review' page. The 'Performance Check In' section is visible, and the 'Excel' and 'PDF' icons are highlighted.

EXCEL FORMAT

PDF FORMAT

	A	B	C	D	E	F
1	Performance Check In					
2	Save for Later					
3	Question	What is going well? What are the "wins" in this evaluation cycle?				
4	Manager					
5	Answer	Manager response				
6	Employee					
7	Answer	Employee self-reflection				
8	Question	What didn't turn out for you?				
9	Manager					
10	Answer	Manager response				
11	Employee					
12	Answer	Employee self-reflection				
13	Question	What else is going on?				

Performance Check In

11:54 AM
10/28/2022
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Question
What is going well? What are the "wins" in this evaluation cycle?

Manager
Answer
Manager response

Employee
Answer
Employee self-reflection