## TALENT & PERFORMANCE

### Creating Employee Check-ins

Check-ins provide an informal work review between managers and employees. You can launch a check-in on both your desktop and the Workday mobile app. A check-in requires two participants:

- the user who creates the check-in; and
- the user who receives the check-in.
- Both workers and managers can initiate a check-in.

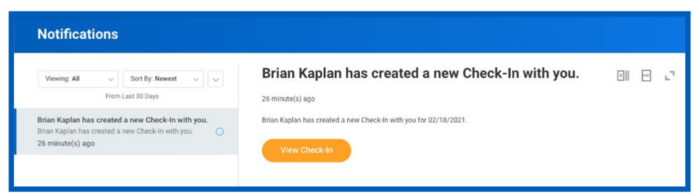
Participants can create unlimited check-ins as long as each check-in has a unique date.

- 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.
- You can create only one check-in for a given date between two participants.

From the Search box, navigate to the **My Check-Ins report**…

1. Select **Create Check-In**.
2. Select the Participant you would like to have your check-in with.
3. (Optional) Select the **Notify Participant** checkbox. Workday will send a notification when you finish creating the check-in.
4. Specify a **Planned for** date. Remember that you can change this date at any time.
    a. (Optional) In the **Description** field, include any context you think may be helpful.
    b. (Optional) In the **Attachments** section, add any files that may be relevant.
    c. (Optional) To include a specific topic for the check-in, go to the **Manage Topics** section and select the **Add** icon ⊕ to include a new topic.
5. In the **Shared Notes** section, enter any notes you would like to share with the participant.
6. In the **My Notes** section, enter any private notes. These notes are only visible to you.
    a. (Optional) Add files that you think may be helpful in the **Attachments** section.
7. After adding any topics, notes, or attachments, select **Save** to create the check-in or to send the check-in to the participant.

If you opted to notify the participant, they will be alerted of the scheduled check-in.




<u>Note</u>: You can also view, create, edit, archive, and delete check-ins and topics from the My Check-Ins report.

### Creating Check-in Topics

(Optional) You can easily create topics to add to your check-ins by navigating to the My Check-Ins report. This option allows you to organize your check-ins by type such as projects, performance, etc.

From the Search box, navigate to the **My Check-Ins report...**

1. Navigate to the **Topics** tab and select the **Create Topic** button.
2. Enter the Participant associated with this topic.
   a. (Optional) Select the Notify Participant checkbox. Workday will send a notification when you finish creating the check-in topic.
3. Enter a **Topic Name** and any notes. If this topic applies to a previously created check-in associated with the identified participant, from the Associated Check Ins prompt, select the check-in date.
4. Select **Save**. If you added an associated check-in, Workday adds the topic. Otherwise, this topic will be available to add to your newly created check-ins associated with the same participant.

## Setting Employee Goals

Adding goals in Workday is a great way to establish and track progress during the course of the review period.

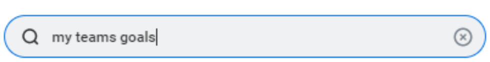
There are two types of goals currently configured in Workday:

- Development Goals
- Performance Goals

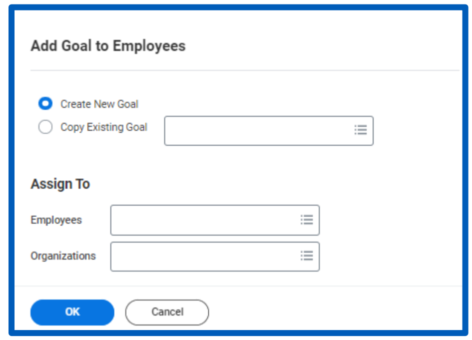
Development goals may be established by the employee or manager. Performance goals should be defined by the manager.

From the **Home Page**:

- Type **My Teams Goals** in the search bar




- Enter the desired **Sup Org** (department) and **Worker** options
- Select **Add Goal to Employees** to add individual or group goals
- Create a New Goal and select the desired employee(s)




- Enter desired details and due date
- The employee will be notified of the goal

Note: You can also view, create, edit, and delete goals by searching My Team's Goals.