

PERFORMANCE MANAGEMENT: Employee-Manager Check-Ins

Overview

- This job aid is intended for managers and employees to understand their role in conducting an employee-manager check-in.
- An employee-manager check-in can be started by either an employee or manager.

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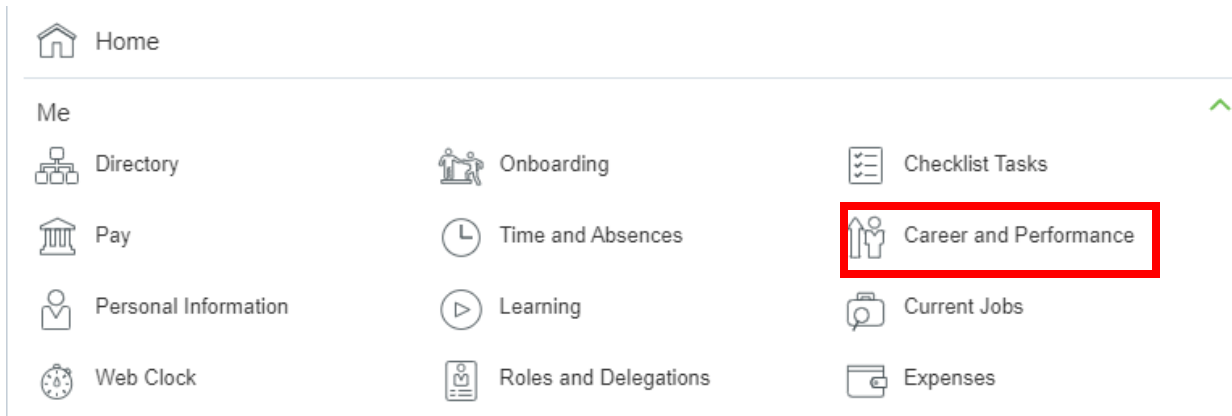
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I. Navigating to the Career and Performance Module

- I. You can access **Career and Performance** in two ways:
 - a. Click the Navigator icon in upper left-hand corner of the Ignite landing page.

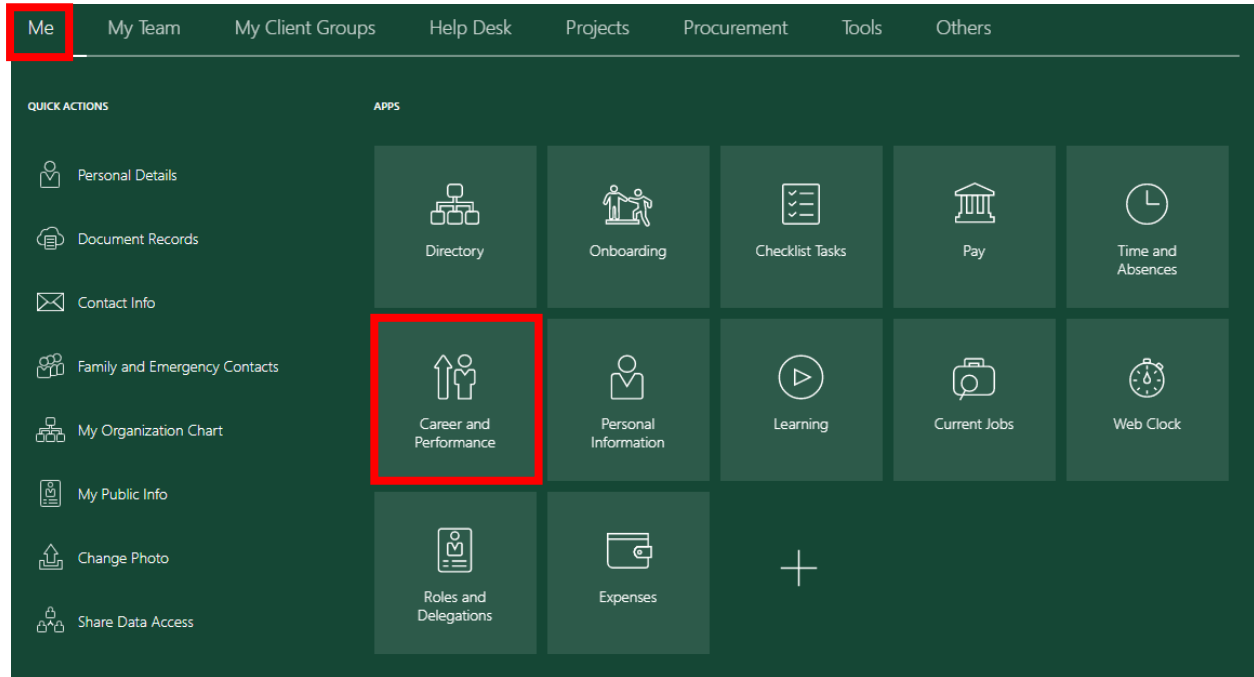


- b. Under the **Me** section, click the drop-down arrow, and select **Career and Performance** from the drop-down list.



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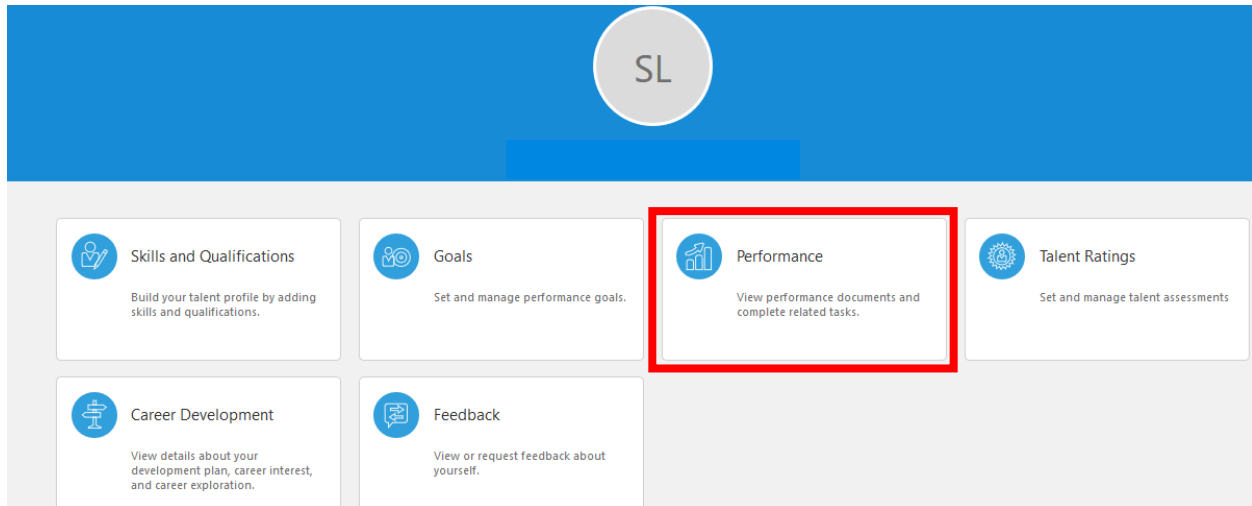
- c. (Option 2) Under the **Me** heading on the home page, you can click on the **Career and Performance** tile on the Ignite main page.



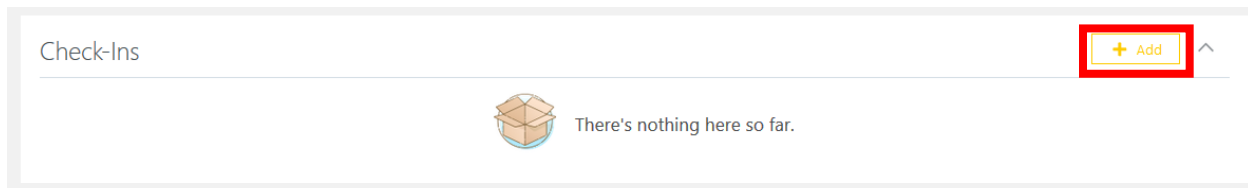
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2. Creating an employee-manager check-in

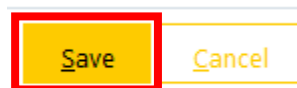
1. In **Career and Performance**, select **Performance**



2. In the **Performance** page, select **+ Add** under the **Check-Ins** header on the right.



3. Ensure the template, document name, manager, and date are accurate, then select **Save**.



4. The check-in is now created.

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3. Fill out check-in

After the check-in is created, click on the check-in to begin.

1. Under the header indicating the questionnaire for you, select **Edit**.

The screenshot shows a web interface for a performance check-in. At the top, there is a 'Details' header with a dropdown arrow. Below this is the title 'Questionnaire For Testuser_Baylor_s48'. To the right of the title is an 'Edit' button with a pencil icon, which is highlighted with a red rectangular box. Below the title, there are four questions: 'Regarding performance goal, development goal or general work progress, please respond to the following questions:', 'What progress have you made since the last Check-In or Performance Evaluation? What have been your top one or two recent accomplishments?', 'What are one or two areas where you would like to make even more progress?', and 'How can your manager best support your work and progress?'. At the bottom, there is a question: 'Do you have any additional comments or feedback?'.

2. Fill out the questions, then **Save**.

The screenshot shows two buttons: a yellow 'Save' button and a white 'Cancel' button with a yellow border, positioned side-by-side.

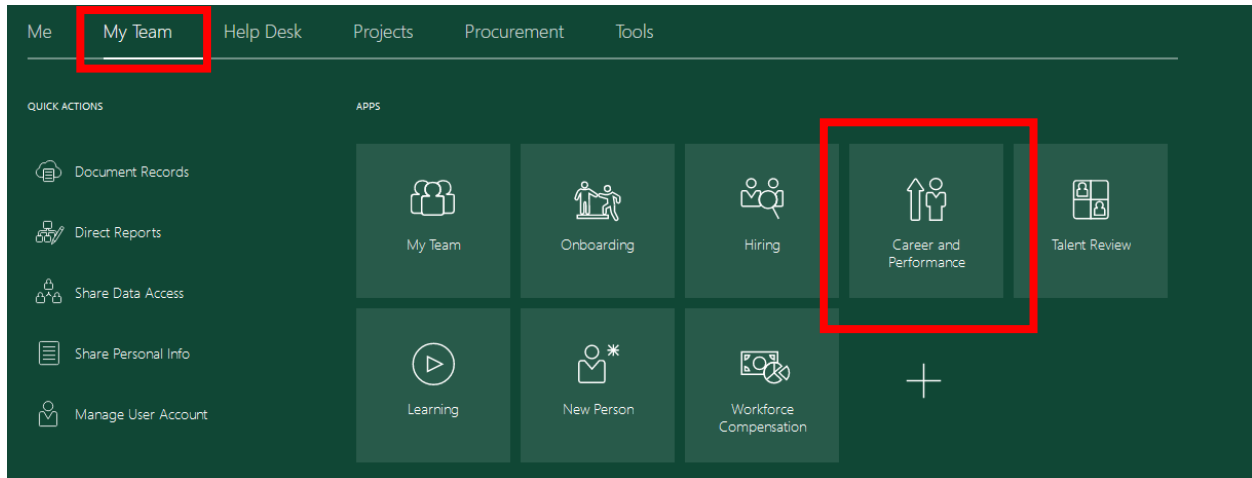
3. The check-in is now filled out. Next, your manager must fill out their questionnaire in your check-in.

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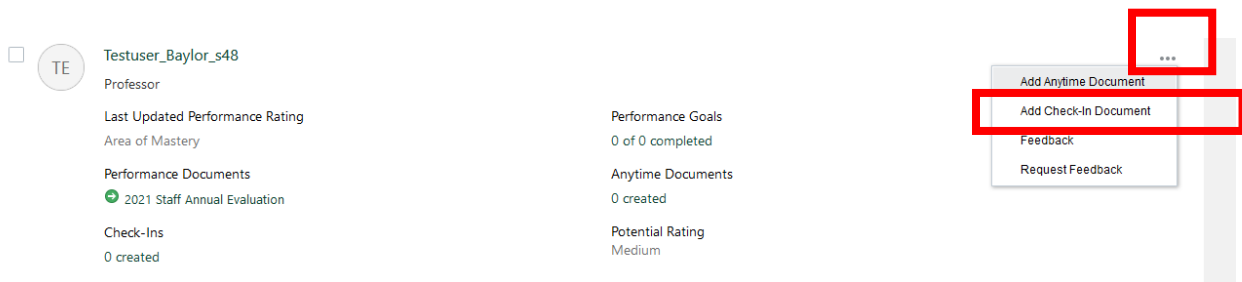
4. Adding a direct report's check-in (for managers)

The following illustrates how a manager can access and then fill out their portion of the employee-manager check-in.

1. Click **Career and Performance** under **My Team**.



2. Click on the 3 dots to the right of your direct report's name, then **Add Check-In Document**.



3. Ensure the review period, template, document name, manager, and date are correct, then click **Save and Close**.
4. The check-in is now created.

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5. Accessing and filling out your direct report's check-in (for managers)

The following illustrates how a manager can access and then fill out their portion of the employee-manager check-in. Once the form is created in the previous step, the check-in will automatically open. However, should you need to come back to it later, follow steps 1 and 2 below.

1. Under **Goals and Performance Overview**, select the check-ins link under the name of the employee.

The screenshot shows the 'My Team' interface. At the top, there is a search bar labeled 'Search Person' and a 'Show Filters' button. Below this is a list of team members. The first member is 'Testuser_Baylor_s', a Coordinator I, Academic Affairs. Under their name, there are several links: 'Performance Goals' (0 of 2 completed), 'Performance Documents', 'Check-Ins' (1 created | Last On 2020-11-17), 'Anytime Documents' (0 created), and 'Potential Rating' (High). The 'Check-Ins' link is highlighted with a red box.

2. Under **Check-Ins**, select the check-in document.

The screenshot shows the 'Check-Ins' interface. At the top right, there is a '+ Add' button and an upward arrow. Below this is a list of check-in documents. The first document is 'Employee-Manager Check-In 11/17/2020', with a sub-label 'Employee-Manager Check-In'. To its right, it says 'Discussed With Testuser_Baylor_s48' and '11/16/2020'. The document title is highlighted with a red box.

3. Enter the manager questionnaire.
 - a. Select **Edit**, answer the following questions, then click **Save**.








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Questionnaire For Testuser_Baylor_s48

Save Cancel

Regarding performance goal, development goal or general work progress, please respond to the following questions:

What progress has this employee made since the last Check-In or Performance Evaluation? What has been this employee's top one or two recent accomplishments?

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The check-in form is now complete.