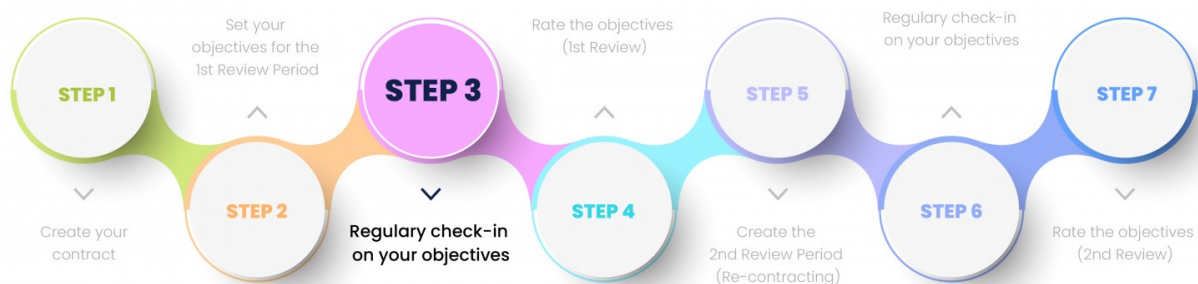# The Performance Agreement - Check-ins

Process: Step 3

Lesson duration

About 6 minutes

What you will **learn:**

- When the Check-in functionality becomes **active**

- Using the **Check-in stats**

- How a **manager** would do a check-in on an objective, and provide feedback

- How the employee can **reply** to a checked-in objective's feedback

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Doing a Check-in on Objectives

After submitting their performance objectives, employees will work on achieving them for three to five months before doing the review with their managers.

During this period, using the Check-in functionality provides a simple but effective way of keeping the objectives in focus, getting guidance and direction from a manager, and ensuring there are no surprises during the actual review.

Just note, a manager does not have to check-in on all objectives every time a Check-in is done. Select a few - if guidance is needed - and give feedback only on those objectives. During the next Check-in, focus on another set of objectives.
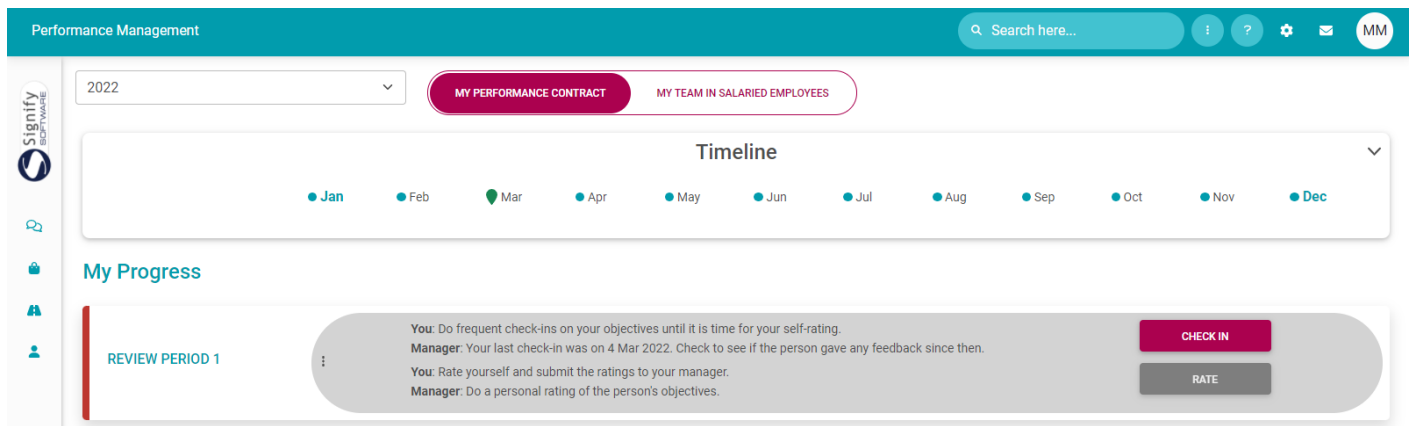
> Remember, a Check-in is not a replacement for a face-to-face discussion with your employee/manager, it is done in addition to regular discussions.

> A Check-in can be done as many times during your performance cycle as is needed.

Activating the Check-in functionality

Using the Check-in functionality is optional and depends on a company's configuration.

If Check-ins are enabled in the system, the **CHECK-IN** button will become active when an employee's objectives have been submitted and approved - that is when the contracting phase has concluded. See the screenshot below.

2022 ▾   **MY PERFORMANCE CONTRACT**   MY TEAM IN SALARIED EMPLOYEES

Timeline   ▾

● Jan   ● Feb   📍 Mar   ● Apr   ● May   ● Jun   ● Jul   ● Aug   ● Sep   ● Oct   ● Nov   ● Dec

My Progress

REVIEW PERIOD 1   ⋮

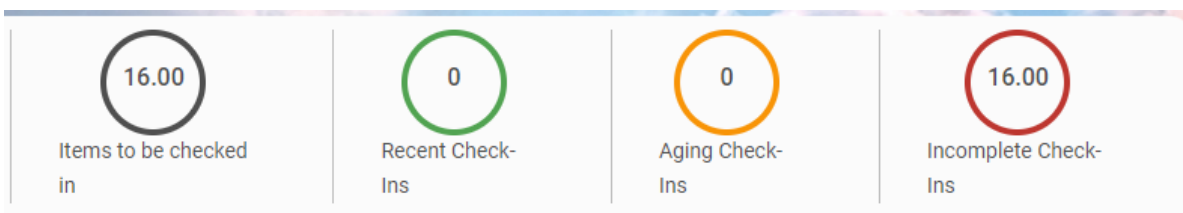**You**: Do frequent check-ins on your objectives until it is time for your self-rating.
Manager: Your last check-in was on 4 Mar 2022. Check to see if the person gave any feedback since then.
You: Rate yourself and submit the ratings to your manager.
Manager: Do a personal rating of the person's objectives.

CHECK IN

RATE

Check-in statistics

When the employee or manager opens the employee's check-in screen, find a summary of Check-in statistics at the top of the screen. It serves to give some indication of where to focus, and this is helpful when there are lots of objectives on a performance agreement.

16.00	1.00	0	15.00
Items to be checked in	Recent Check-Ins	Aging Check-Ins	Incomplete Check-Ins

See below for the interpretation of the numbers.

⬛	**Items to be checked in**	Total number of objectives (KPI level) in the performance agreement
🟩	**Recent check-ins**	Objectives on which the manager has recently (less than 2 weeks ago) performed a check-in. Their feedback should be checked by the employee.
🟧	**Aging check-ins**	Objectives on which the manager checked in more than 2 weeks ago. Consider doing another check-in soon.
🟥	**Incomplete check-ins**	No check-in was done on these objectives yet.

Do a Check-in (as manager)

Since the bulk of the activity on the check-in screen is from the manager's side, the following screenshots are from the manager's perspective.

- From the Manager's Performance Management Dashboard, locate the applicable person's contract, and click its **CHECK-IN** button.

- The Check-in screen opens, revealing:

The Check-in stats at the top.

The standard section menu is on the left side of the screen.

The objectives are grouped per section in the middle of the screen.

KEY PERFORMANCE AREAS

Internal Process
Succession Management

KEY PERFORMANCE INDICATOR		LAST CHECK-IN	LAST RATING	PERSON COMMENT	MANAGER COMMENT
Implement online tool **Measures & Ratings** System aligned to configuration document as per company requirements and outputs.	✓				
Career paths populated online in line with HR input. **Measures & Ratings** Functional Career Path model online	✓				

Learning and Growth

- Locate the objective due for a Check-in, and click on its record …

KEY PERFORMANCE INDICATOR		LAST CHECK-IN	LAST RATING	PERSON COMMENT	MANAGER COMMENT
Implement online tool **Measures & Ratings** System aligned to configuration document as per company requirements and outputs.	✓				

- …to open the check-in feedback screen.

- Provide feedback as needed.

> The feedback in the **My Comments** field is made available to your employee; feedback typed as **Private Comments** is not.

- Use the **Rating** toggle button to indicate current progress sentiment.

> Evaluating an item is not done in terms of the regular 1 to 5 (e.g.) rating scale but in the format of an **On Track**, or **Not on Track** indication.

ON TRACK

NOT ON TRACK

Key Performance Indicator

Implement online tool

Rating   ON TRACK

My Comments
Well done, you are going to achieve your goal. Just pay attention to adequate change management before engaging with the users.

These comments are visible to the employee.

Private Comment
Check-in again in two weeks' time and then talk about the progress against the project plan.

These comments are only visible to you as manager.

Historical Check-Ins

CHECK-IN DATE	RATING	COMMENTS	PRIVATE COMMENT
		No Records Found	

CANCEL   SAVE

- Click **SAVE** when done.

After saving the feedback, notice how the feedback is added to the history of the objective's check-ins.

- In the lower, right corner, click **EDIT LAST COMMENT** to edit the last feedback. The agreement screen is updated with objectives having had check-ins done on them.

Reply on Check-in feedback (as employee)

When an employee views a review period on their performance management dashboard, the presence of check-in feedback is displayed as a status message.
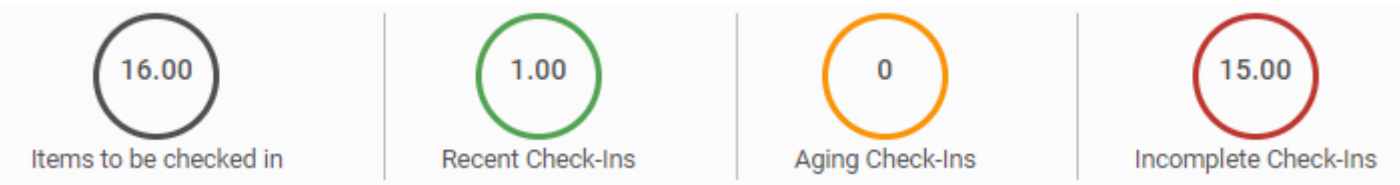

- Click **CHECK-IN** to open the check-in screen.

The screen statistics are updated to reflect new entries.

The checked-in objectives are highlighted, and feedback is visible.

- Click on an objective's record if the employee would like to reply to the manager's feedback.

Key Performance Indicator

Implement online tool

My Comments

Thanks! And request is noted.

Historical Comments

COMMENT DATE	COMMENTS
No Records Found	

CANCEL   **SAVE**

Feedback history is updated if comments are saved. Use the **EDIT LAST COMMENT** link in the lower right corner if you'd like to edit the comment.

Key Performance Indicator

Implement online tool

My Comments

Historical Comments

COMMENT DATE	COMMENTS
4 Mar 2022	Thanks! And request is noted.

CANCEL   **SAVE**   EDIT LAST COMMENT

The Check-in screen is updated with the employee's reply.

KEY PERFORMANCE INDICATOR		LAST CHECK-IN	LAST RATING	PERSON COMMENT	MANAGER COMMENT
Implement online tool **Measures & Ratings** System aligned to configuration document as per company requirements and outputs.	✓	4 Mar 2022	On Track	Thanks! And request is noted.	Well done, you are going to achieve your goal. Just pay attention to adequate change management before engaging with the users.

- Click **BACK TO DASHBOARD** to exit the check-in screen.

BACK TO DASHBOARD

Recommended further reading:

- Glossary of terminology and definitions
- How to Use Performance Management with Success
- The Employee's Performance Management Dashboard
- Open an Existing Contract
- Create a New Contract
- Functionalities and Layout of the Performance Management Dashboard
- The Manager's Performance Management Dashboard
- Overview of The Performance Agreement Screen
- Set your objectives - Part 1 (Working with KPAs and KPIs)
- Set your objectives - Part 2 (Working with the other sections)
- Perform a Check-in on your Objectives
- Rate your objectives

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