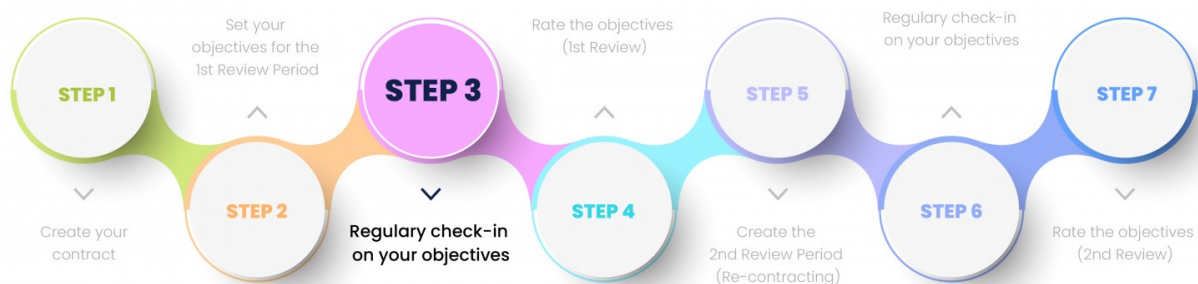


The Performance Agreement - Check-ins

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
-

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.

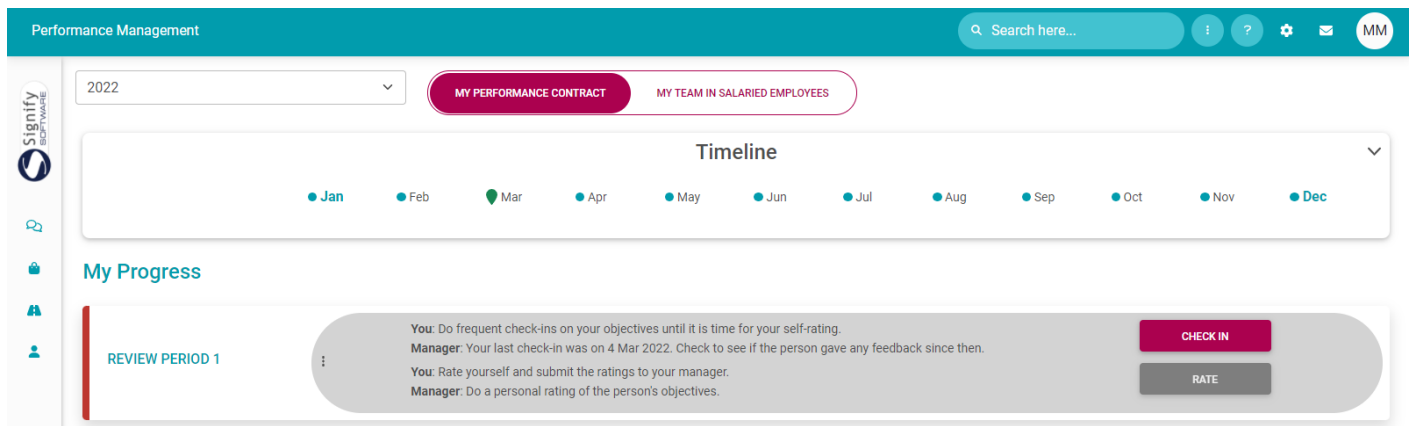
Remember, a Check-in is not a replacement for a face-to-face discussion with your employee/manager, it is done in addition to regular discussions.

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.



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.



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.

CHECK IN

1

people to do Ratings & Check-Ins by

30 Jun 2022

(3 Months Remaining)

ML

Marlize Fourie (SZ003)
Group HR Executive

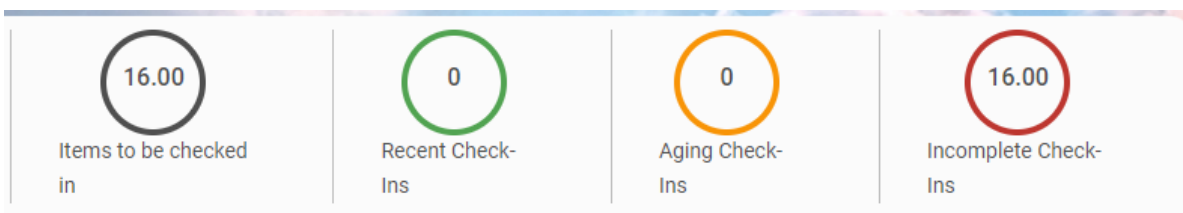
You: Your last check-in was on 4 Mar 2022. Check to see if the person gave any feedback since then.
Person: Do your self-rating and submit to your manager.
You: Do a personal rating of the person's objectives.

CHECK IN

RATE

- 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.

KEY PERFORMANCE AREAS

STRETCH TARGETS

1. Finance

1.1 Policies

VALUES & BEHAVIOURS

LEADERSHIP BEHAVIOURS

KEY COMPETENCIES

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.

Performance Management | 2022

Search here...

ML MARLIZE FOURIE (SZ003)

Ebenhaezer Meyburgh (AD0578)

KEY PERFORMANCE AREAS

- Internal Process
 - Succession Management
- Learning and Growth
 - Learning and Development platform

STRETCH TARGETS

VALUES & BEHAVIOURS

LEADERSHIP BEHAVIOURS

KEY COMPETENCIES

BACK TO DASHBOARD

Key Performance Indicator
Implement online tool

Rating: NOT ON TRACK

My Comments

These comments are visible to the employee.

Private Comment

These comments are only visible to you as manager.

Historical Check-Ins

CHECK-IN DATE	RATING	COMMENTS	PRIVATE COMMENT
No Records Found			

CANCEL SAVE

Aging Check-Ins: 0

Incomplete Check-Ins: 16.00

PERSON COMMENT

MANAGER COMMENT

Learning and Growth

- 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.

Key Performance Indicator

Implement online tool

Rating **NOT ON TRACK**

My Comments

These comments are visible to the employee.

Private Comment



These comments are only visible to you as manager.

Historical Check-Ins

CHECK-IN DATE	RATING	COMMENTS	PRIVATE COMMENT
4 Mar 2022	On Track	Well done, you are going to achieve your goal. Just pay attention to adequate change management before engaging with the users.	Check-in again in two weeks' time and then talk about the progress against the project plan.

CANCEL **SAVE** **EDIT LAST COMMENT**

- 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.

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

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.

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.

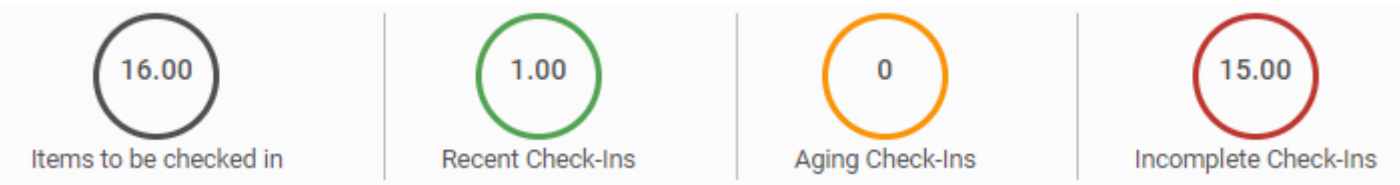
CHECK IN

RATE



- 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.

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.	<div>✓</div> 4 Mar 2022	On Track		Well done, you are going to achieve your goal. Just pay attention to adequate change management before engaging with the users.

- 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](#)



Revision #37

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