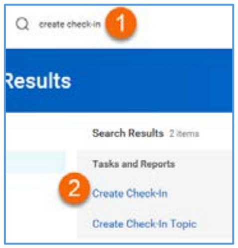
Workday provides an easy way for managers and their workers to record and prepare for informal meetings using check-ins, enabling more frequent and personal communication. Managers and workers can create and schedule a check-in, and within each check-in they can create individual topics to share information.

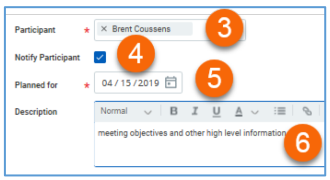
CREATE CHECK-IN: EMPLOYEE OR MANAGER

Both employees and leaders can initiate a check-in conversation with each other or additional employees.

From Home page:



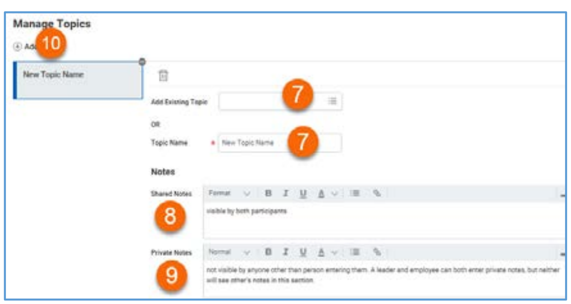
1. Type "Create Check-In" into Workday search bar
2. Click **Create Check-In** in task list



3. Leader name automatically populates.

   NOTE: Change if you intend to meet with someone other than your formal leader
4. Leave **Notify Participant** checked
5. Enter planned date of conversation
6. Enter Description (meeting objectives and other high level information)

MANAGE TOPICS



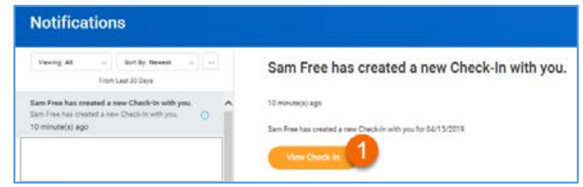
7. Enter Topic Name (select from existing topics - repeated topic discussed in a previous check-in or enter new topic name)
8. Enter Shared Notes
9. Enter Private Notes
10. Click **Add** to continue to add additional topics
11. Click **OK -** Leader receives notification. It is recommended to also send Outlook meeting invitation to ensure time availability

Shared Notes - visible by both participants

Private Notes - not visible by anyone other than person entering them. A leader and employee can both enter private notes, but neither will see other's notes in this section.

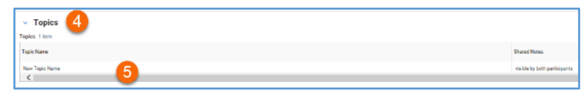
REVIEW CHECK-IN: RECEIVER

From Notifications:



1. Click **View Check In** button

2. View date of meeting
3. Create Outlook calendar entry if necessary



4. Click Topic **arrow** to expand
5. View check-in topics

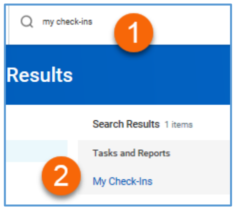
UPDATE CHECK-IN CONTENTS – EMPLOYEE & MANAGER

Both employees and managers can add Shared or Private Notes, add or change Topics, and make any other changes to the check-in after they have been initiated.

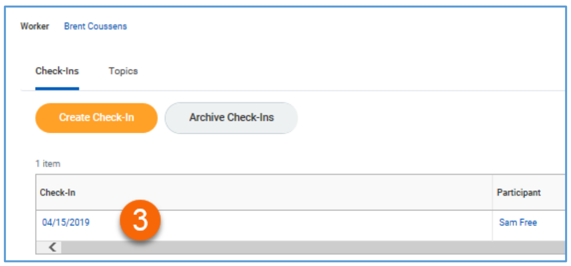
When Check-ins occur, it is recommended to update notes with discussed context and action items. At the end of the year, full reports of all check-in notes are accessible for inclusion in the end of year performance process.

From Home page:

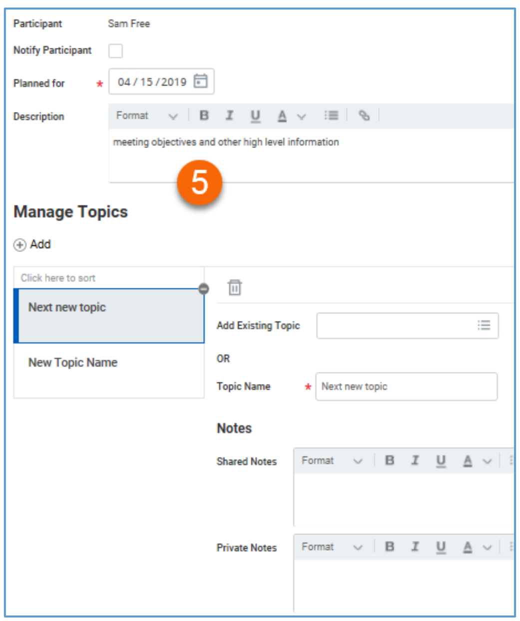
1. Type "My Check-Ins" into Workday search bar
2. Click **My Check-Ins** in task list



3. Find appropriate Check-In
4. Click Edit on far right

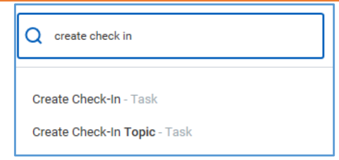


5. Make any changes needed, including adding notes, updating topics, etc.
6. Click **OK –** both participants now see updates



Available **tasks** for Check-Ins:

1. Create Check-In - set up meeting
2. Create Check-In Topic - manage library of meeting topics, if needed, instead of editing existing meeting



Available **reports** for Check-Ins:

1. My Check-Ins Report - lists all of your existing check-ins, including who they are with, the date, topics, and options to edit or delete
2. View Check-Ins Report - leveraged by leaders to view all check-ins he/she has with particular employee