Manager Check-In

Process: Employee and Manager can keep notes for 1/1s and other meetings

Action done by: Employee and Manager

Visibility: Employee and Manager (and management chain), HR Admin, HR Talent Admin, HR Partner

Overview:

Employee and Manager can keep notes for 1/1s and other meetings. These can be used flexibly in different applications. It is a great way to keep notes organized and in one place for Employee and Manager.

Note: This is not limited to the managerial reporting chain. Others can use this check-in feature (e.g. informal relationships for projects etc…)

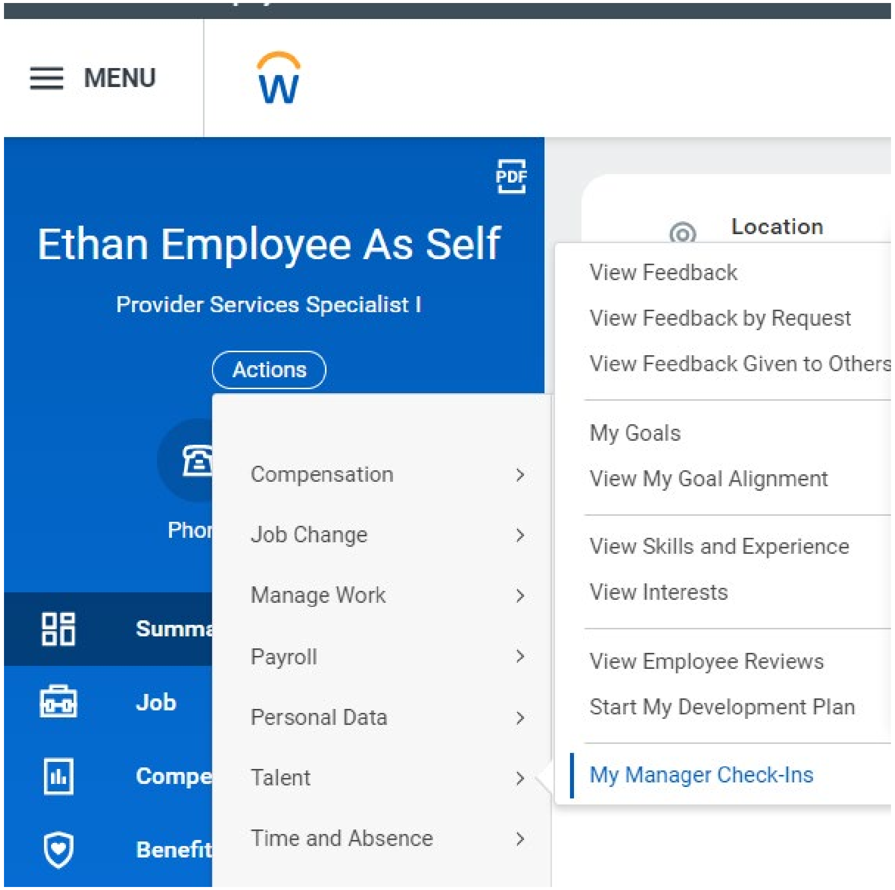
Start a “My Manager Check-Ins”

Employee Profile

Actions

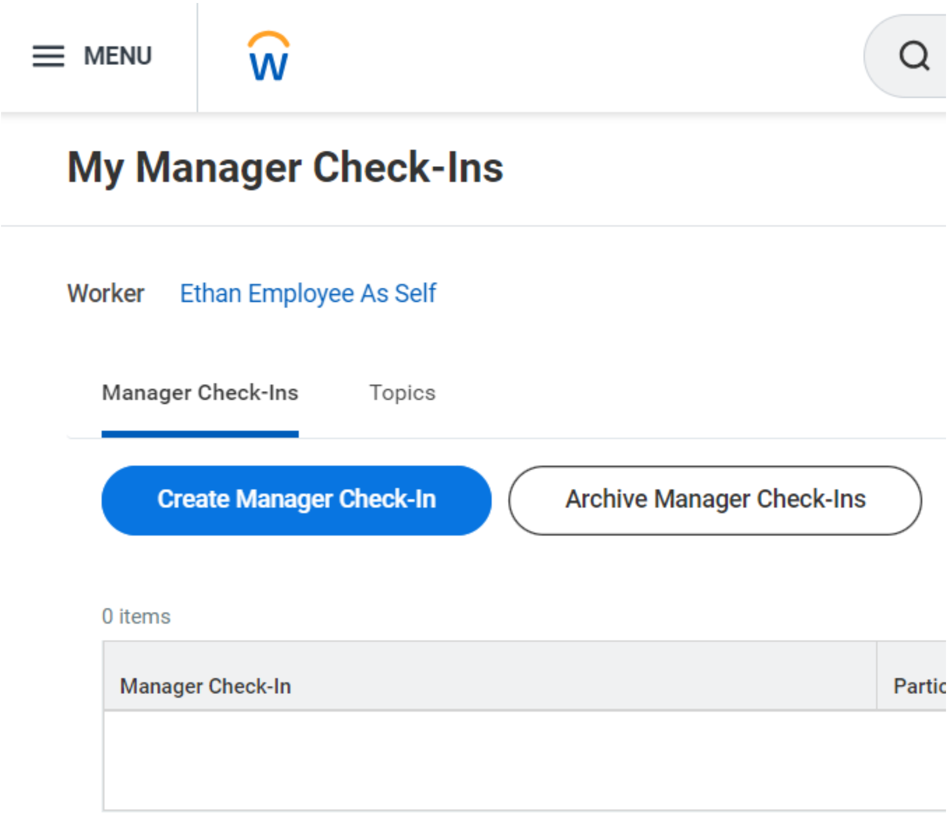
Talent

“My Manager Check-Ins”



Create Manager Check-In

To start a new Manager Check-In



Add Notes and Attachments

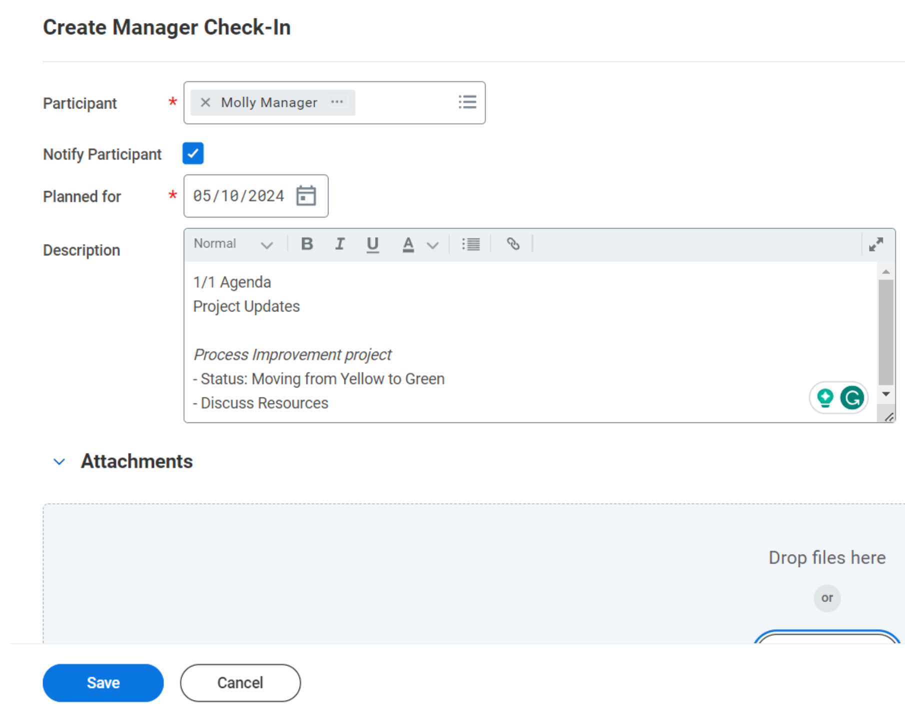
The manager's name will populate automatically in the participant field

Check the box if you want a notification to go to the manager

Put in a target date for review. This could be today's date or a future planned meeting.

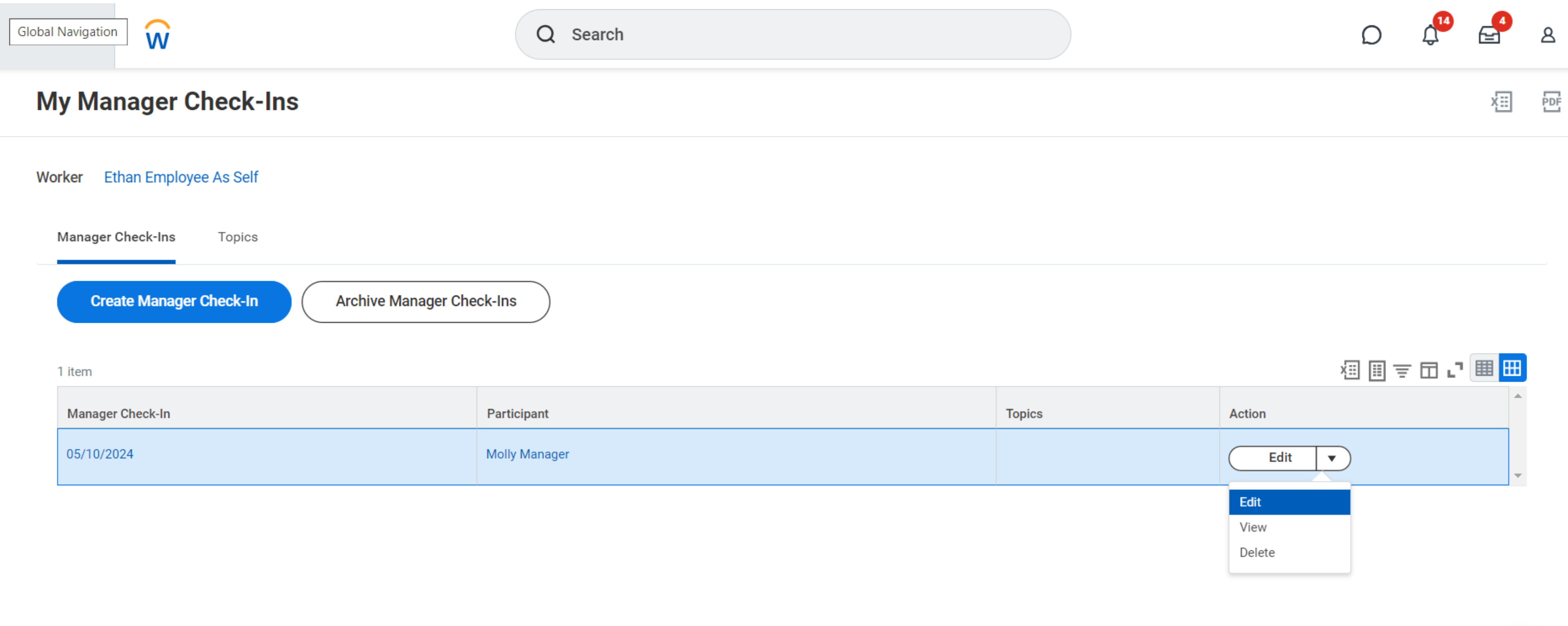
Add notes to the Description Field

Add any related documents in the attachment section



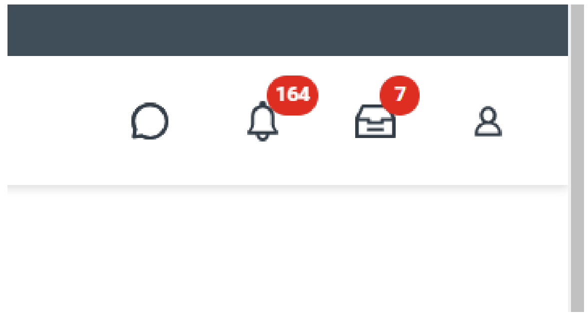
Employee View

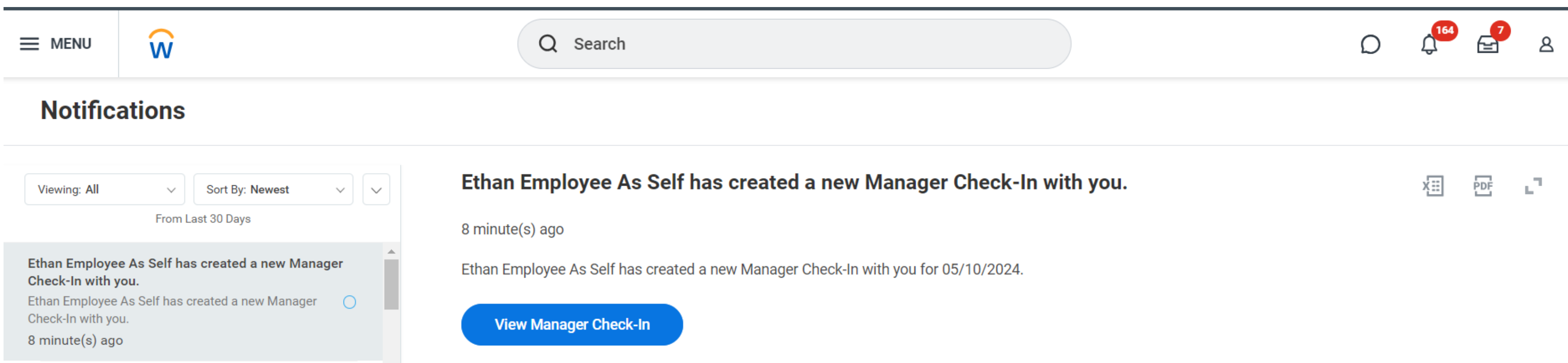
The Employee can see the list of Manager Check-In and Edit/View/Delete



Manager View

This will automatically appear in the Manager's Notifications because the notify box was checked. Click the notifications bell icon to view.





Manager View

Manager can see the detail