



# 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...)

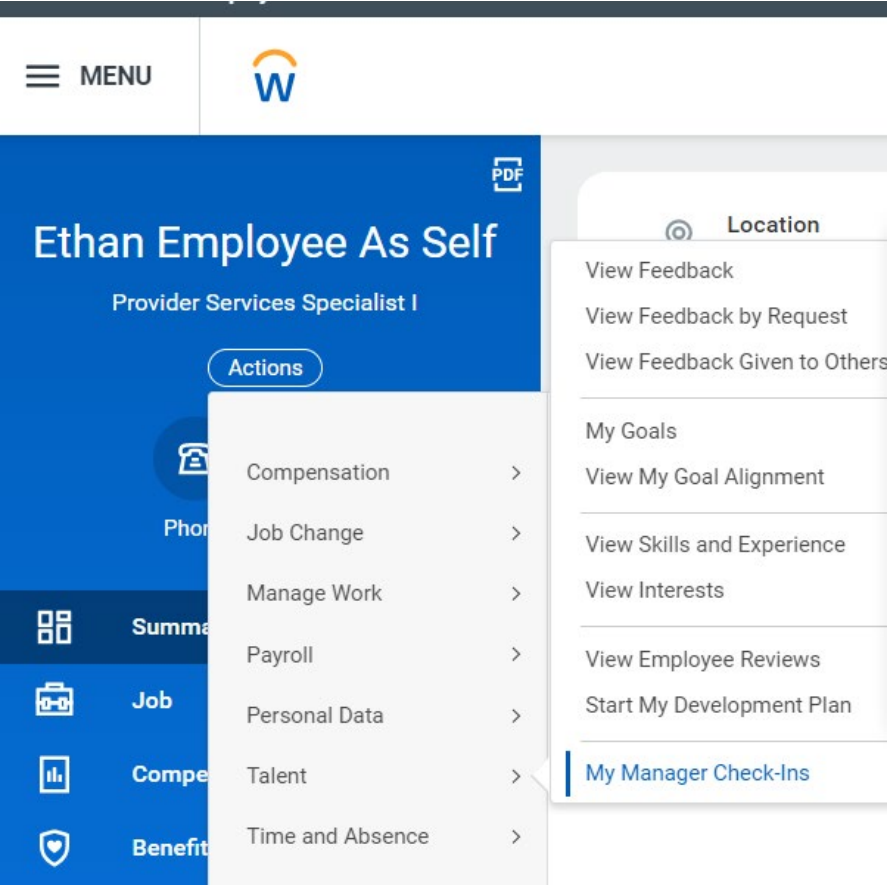
# Start a “My Manager Check-Ins”

Employee Profile

Actions

Talent

“My Manager Check-Ins”



# Create Manager Check-In

To start a new Manager Check-In

The screenshot shows a web application interface. At the top left, there is a 'MENU' icon. In the center, there is a logo with a blue 'W' and an orange arc above it. On the top right, there is a search icon. Below the header, the main title is 'My Manager Check-Ins'. Underneath, there is a user selection area with 'Worker' and 'Ethan Employee As Self'. Below that, there are two tabs: 'Manager Check-Ins' (which is active) and 'Topics'. There are two buttons: a blue 'Create Manager Check-In' button and a white 'Archive Manager Check-Ins' button. Below the buttons, it says '0 items'. At the bottom, there is a table with one row and two columns: 'Manager Check-In' and 'Partic'.

# 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







## Create Manager Check-In

Participant \*  

Notify Participant



Planned for \*  

Description

Normal      

1/1 Agenda  
Project Updates

*Process Improvement project*  
- Status: Moving from Yellow to Green  
- Discuss Resources

### Attachments

Drop files here

or



Save

Cancel

# Employee View

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

## My Manager Check-Ins



Worker [Ethan Employee As Self](#)

**Manager Check-Ins** [Topics](#)

Create Manager Check-In

Archive Manager Check-Ins

1 item

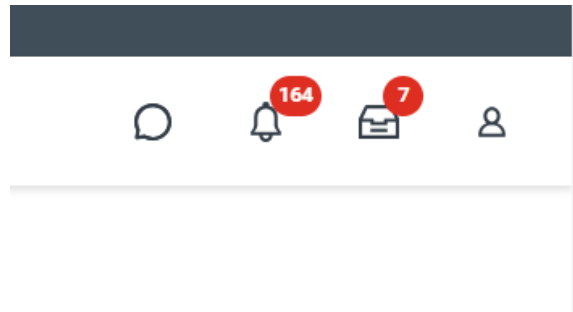


Manager Check-In	Participant	Topics	Action
05/10/2024	Molly Manager		<a href="#">Edit</a> ▼

- 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.



Navigation bar containing a menu icon, the 'W' logo, a search bar with the text 'Search', and notification icons for messages, a bell with a '164' badge, an envelope with a '7' badge, and a user profile icon.

## Notifications

Filtering options: Viewing: All, Sort By: Newest, From Last 30 Days.

**Ethan Employee As Self has created a new Manager Check-In with you.**  
Ethan Employee As Self has created a new Manager Check-In with you. 8 minute(s) ago

**Ethan Employee As Self has created a new Manager Check-In with you.**




8 minute(s) ago

Ethan Employee As Self has created a new Manager Check-In with you for 05/10/2024.

[View Manager Check-In](#)

# Manager View

Manager can see the detail

≡ MENU 

Q Search

## View Manager Check-In

Manager Check-In	05/10/2024	Created On	10/14/2023
Created by	Ethan Employee As Self	Last Updated	10/14/2023
Participant	Molly Manager		
Description	1/1 Agenda Project Updates  <i>Process Improvement project</i> - Status: Moving from Yellow to Green - Discuss Resources		

Edit ▼

Edit  
My Manager Check-Ins