

My HR Connection Performance Training Guide

Manager – Mid-Cycle Performance Development Check-In

Revision History

Version	Date	Description
1.0	July 13, 2018	Initial Draft
1.1	October 9, 2018	Revised Draft – Updated Screenshots
1.2	March 25, 2019	Update logo and branding

Table of Contents

1.	Introduction.....	4
1.1.	Course Objectives.....	4
2.	Check ins and Reviewing Goal Progress	5
2.1.	Check In Meetings.....	5
2.2.	Check In Business Process.....	5
2.3.	Completing the Check In Task in My HR Connection	6

1. Introduction

1.1. Objectives

Upon completion of this manual, a Manager will be able to:

- Understand the Check In Components.
- Successfully complete their required tasks in My HR Connection.

2. Check ins and Reviewing Goal Progress

2.1. Check In Meetings

Regular Conversations are a critical component of the Goal Setting and Performance Development Process. It is one of the critical success factors to ensure critical dialogue, feedback, and support necessary to accomplish the goals are provided.

Managers are required to set two Check In Meetings as part of the Goal Setting and Performance Development Process. In advance of the pre-scheduled meetings, employees are expected to have updated their goal progress.

Some suggested items for discussion during the Check In meetings include:

- List most significant accomplishments/ achievements with respect to your goals
- What challenges, obstacles, or unexpected changes have you experienced?
- What has been working well?
- What would you do differently?
- Do you require any additional support to achieve your goals?
- How can I better support you?

2.2. Check In Business Process

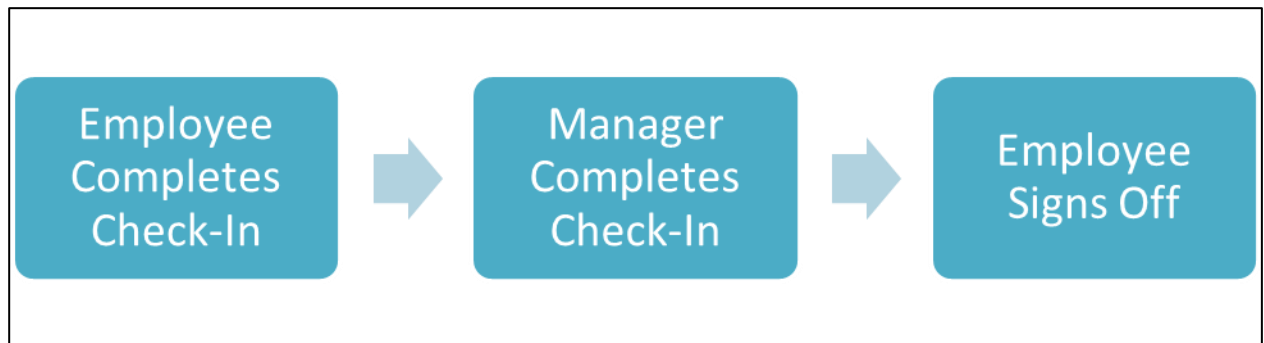
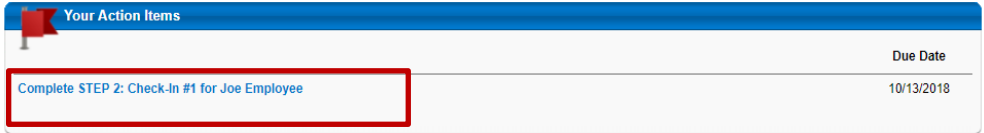
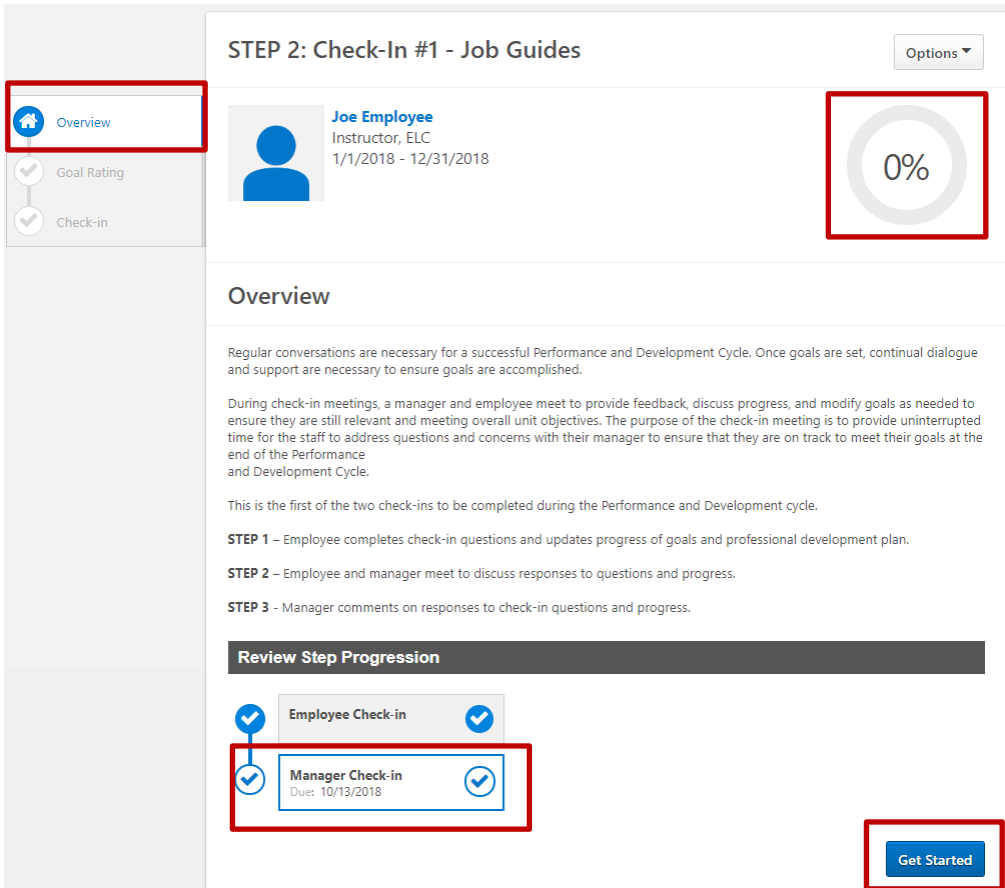
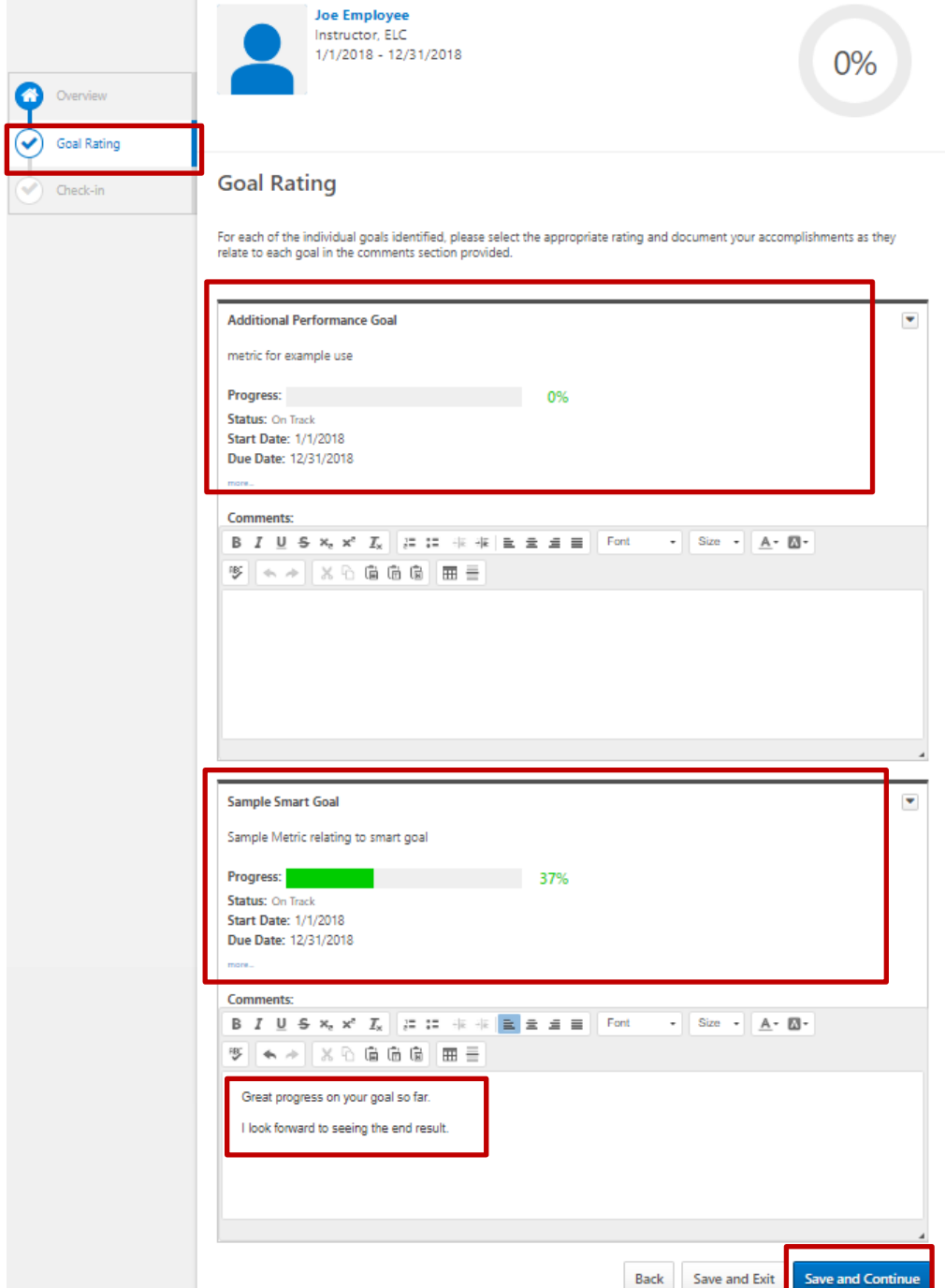


Figure 1: Check In Business Process

2.3. Completing the Check In Task in My HR Connection

Step	Steps to Execute
1 Manager Receives Notification to Complete the Check In Step.	Manager Receives Email in Outlook
2 Log into My HR Connection and select the related task for your direct report.	
3 Read the overview of the task. Select the link and click Get Started to launch the task.	

Step	Steps to Execute
<p>4 The Goal Rating section opens to review progress of the employee's goals and comments.</p> <p>Enter any feedback in the comments section.</p> <p>Select Save and Continue.</p>	

5 Review and provide feedback on the Check In Questions answered by the employee.

An answer is required for each question.

This could be as simple as initials, or a complex answer.

* Reminder – These conversations should have already taken place outside of the tool.

Once each question has been answered, Submit.

Overview

Goal Rating

Check In

STEP 2: Check-In #1 - Job Guides

Options

Joe Employee

Instructor, ELC

1/1/2018 - 12/31/2018

50%

Check-in

During these conversations, discuss completed tasks/outcomes to date, accomplishments, challenges, and additional support needed.

Use the section provided to summarize your conversation.

What has been working well?

Comments *

Joe Employee (Self) Review: STEP 2: Check In #1 - Job Guides Time: 10/8/2018 1:35 PM

I have received the necessary funding for the goals I am trying to achieve.

B I U S X I

Font

Size

I am glad that the funding worked out.

I know this was a challenge for the team, and it is great to see that it has made a positive impact on your goal.

What challenges, obstacles or unexpected changes have you experienced?

Comments *

Joe Employee (Self) Review: STEP 2: Check In #1 - Job Guides Time: 10/8/2018 1:35 PM

I am finding that there is not enough time to work on this, and I need support in balancing my other tasks.

B I U S X I

Font

Size

I will help with this. Let's have an offline conversation.

Do you require any additional support to achieve your goals?

Comments *

Joe Employee (Self) Review: STEP 2: Check In #1 - Job Guides Time: 10/8/2018 1:35 PM

I need additional help with time management to ensure the goals are met.

B I U S X I

Font

Size

Thank you for letting me know.

As we discussed, let's look into the Learning Catalog to see if there is any available programming.

Back

Save and Exit

Submit

My HR Connection Manager – Mid-Cycle Performance Development Check-in

8 of 9

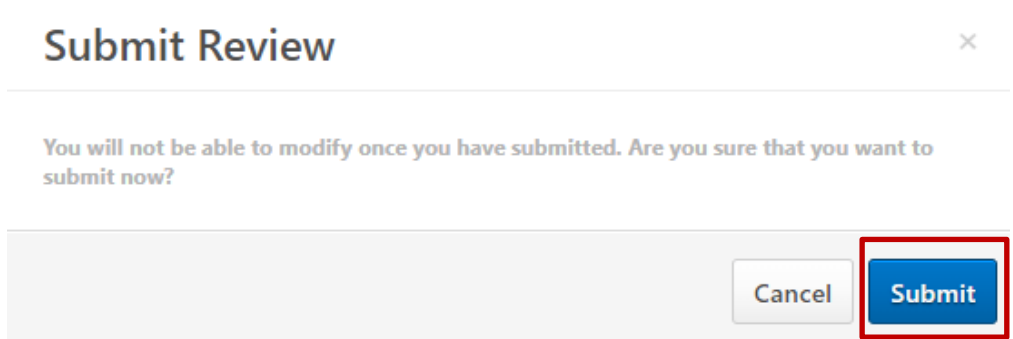
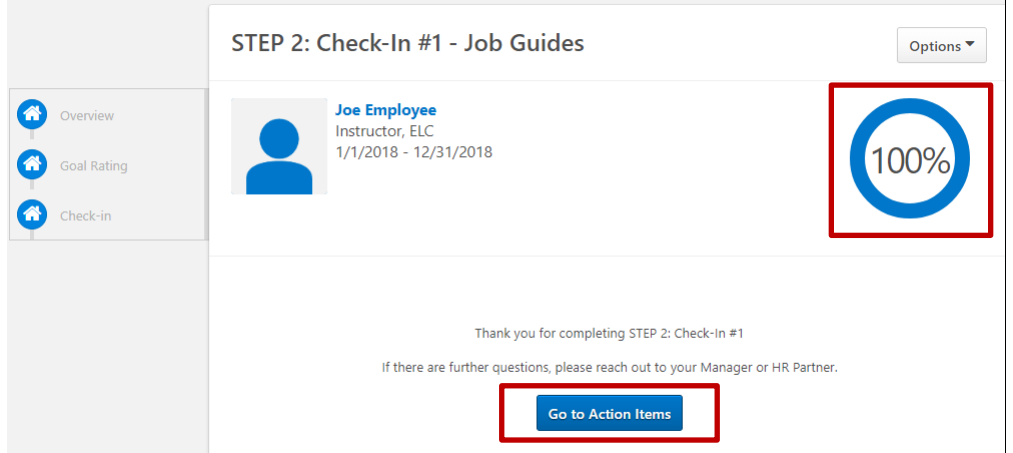
Step	Steps to Execute
<p>6 Once you click submit on the prior page, you will be prompted to submit again.</p> <p>Once you are satisfied with the check in, please Submit.</p>	 <p>The dialog box titled 'Submit Review' contains the text: 'You will not be able to modify once you have submitted. Are you sure that you want to submit now?'. At the bottom right, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red rectangle.</p>
<p>Once the Check In has been completed, you can return to action items and repeat for all other direct reports.</p>	 <p>The screen shows 'STEP 2: Check-In #1 - Job Guides'. On the left is a sidebar with 'Overview', 'Goal Rating', and 'Check-in' (selected). The main area shows a profile for 'Joe Employee', Instructor, ELC, with dates '1/1/2018 - 12/31/2018'. A large blue circle with '100%' is highlighted with a red rectangle. At the bottom, a message says 'Thank you for completing STEP 2: Check-In #1' and 'If there are further questions, please reach out to your Manager or HR Partner.' Below this is a 'Go to Action Items' button, also highlighted with a red rectangle.</p>

Table 1: Check In Task