

My HR Connection
Performance Training Guide

Individual Contributor – Step 2 Check-in 1 and 2

Revision History

Version	Date	Description
1.0	July 13, 2018	Initial Draft
1.1	September 6, 2018	Updated Screen shots
1.2	March 25, 2019	Logo and Branding

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1. Introduction

1.1. Objectives

Upon completion of this manual, an Individual Contributor 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 Process

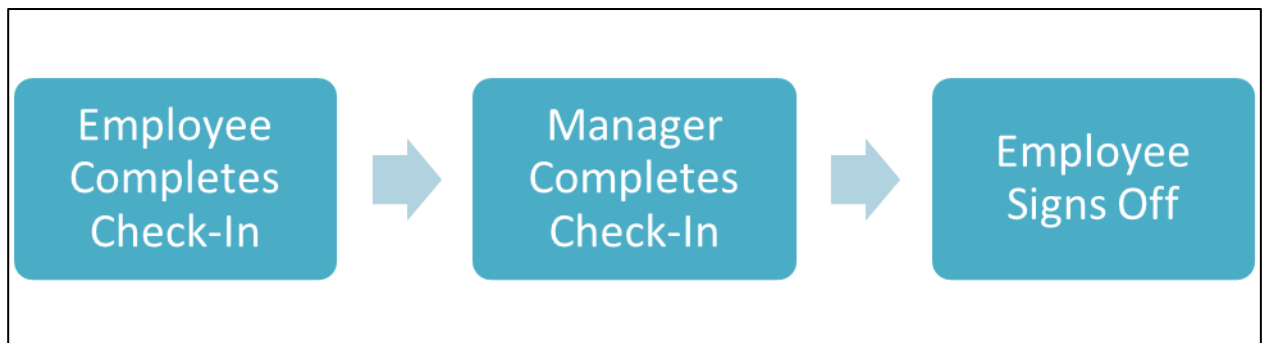
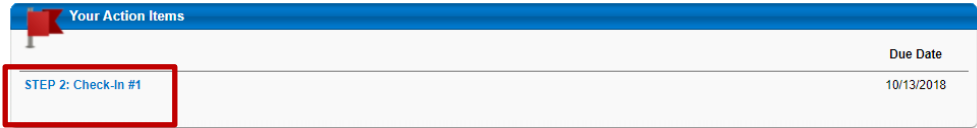
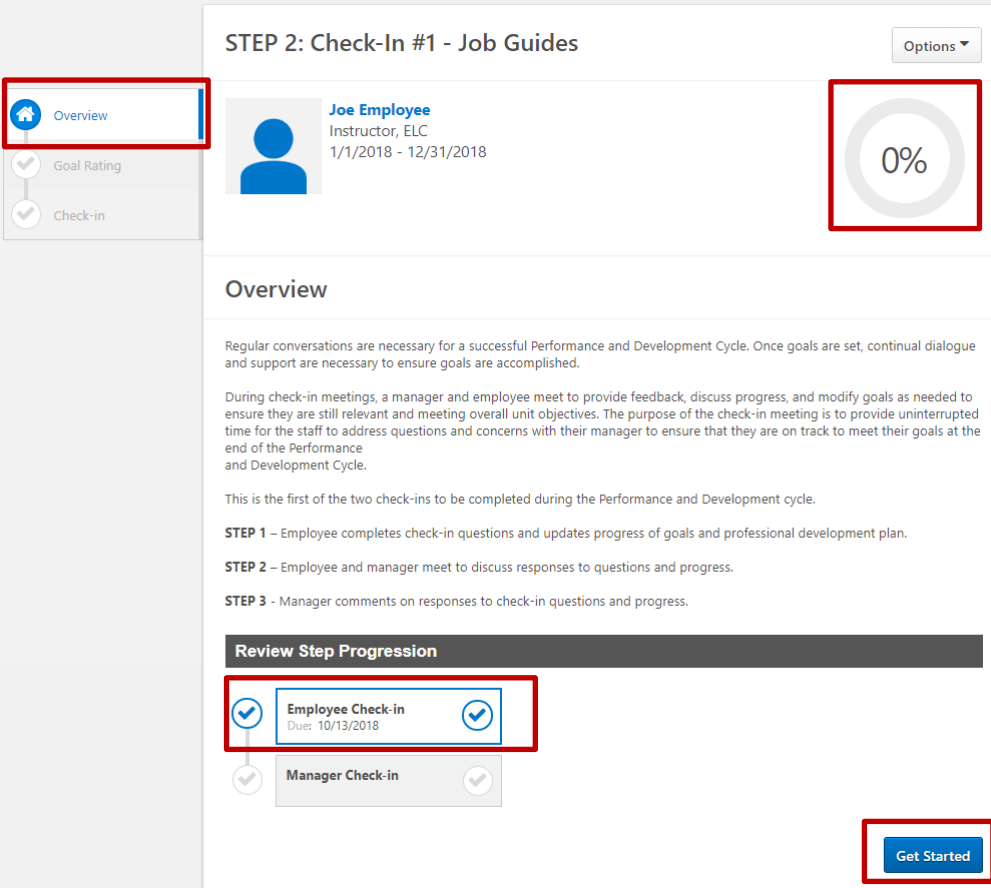


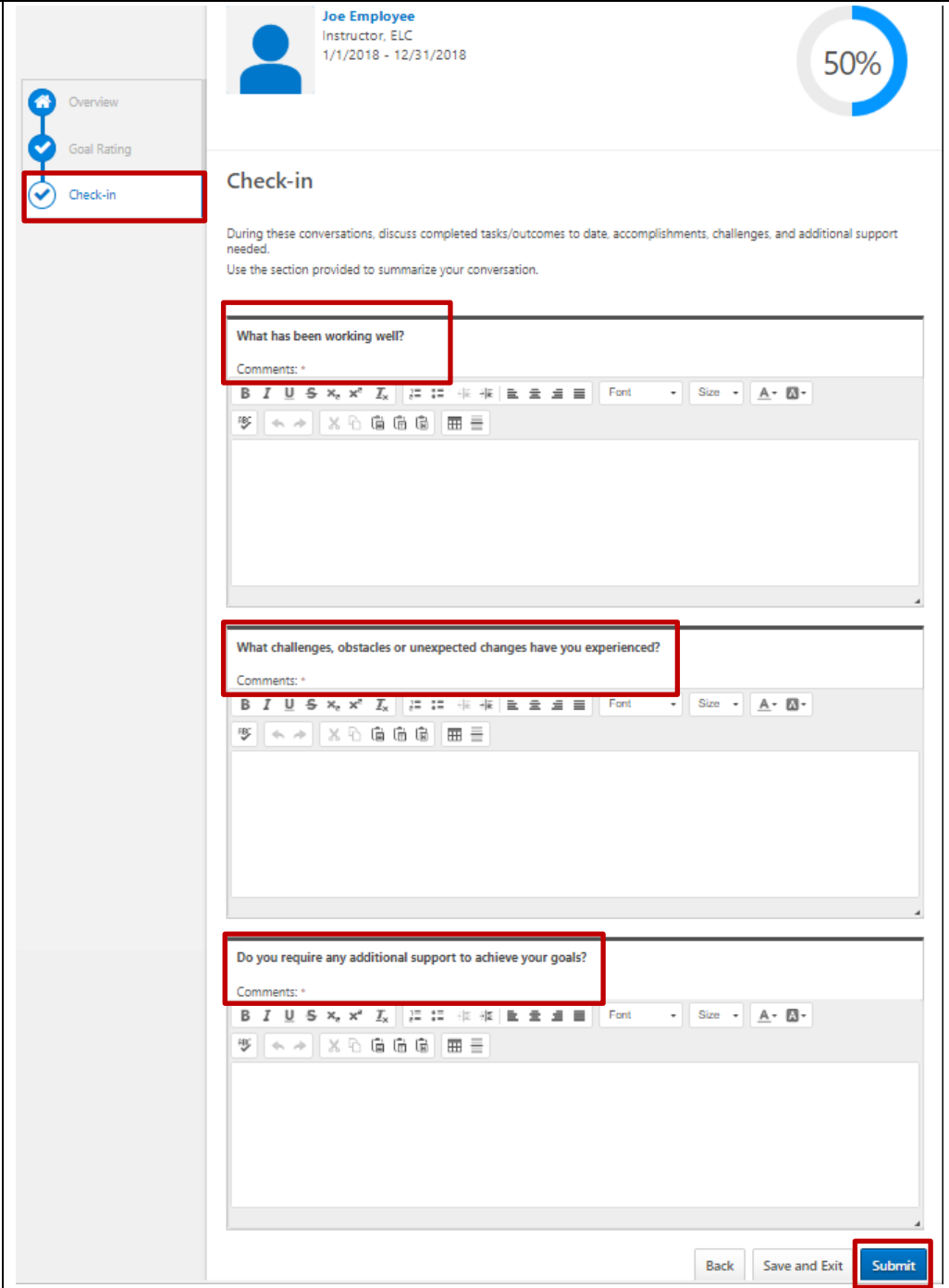
Figure 1: Check In Business Process

2.3. Completing the Check in Task in My HR Connection

Step	Steps to Execute
<p>Log Into My HR Connection to view your Task Step 2: Check In Select the Hyperlink to continue.</p>	
<p>The Check In form Opens Once you have read the overview, Select Get Started.</p>	

Step	Steps to Execute
<p>Update the progress of the goal by selecting the arrow in the corner of the goal.</p> <p>Click – Manage Goal.</p>	<p>The screenshot displays the 'STEP 2: Check-In #1 - Job Guides' interface for 'Joe Employee'. On the left sidebar, the 'Goal Rating' tab is selected and highlighted with a red box. The main content area shows a 'Goal Rating' section with instructions: 'For each of the individual goals identified, please select the appropriate rating and document your accomplishments as they relate to each goal in the comments section provided.' Below this, there are two goal cards. The first is 'Additional Performance Goal' with a progress bar at 0% and a dropdown arrow in the top right corner highlighted with a red box. The second is 'Sample Smart Goal' with a progress bar at 0% and a dropdown arrow in the top right corner highlighted with a red box. Each goal card includes fields for 'Status', 'Start Date', and 'Due Date', as well as a 'Comments' section with a rich text editor.</p>

Step	Steps to Execute
<p>Update the progress of each task and outcomes associated with the goal.</p> <p>The goal's overall progress will be automatically updated once you have updated the progress.</p> <p>Green means on track. Yellow means off track. Red means in danger of not completing.</p> <p>Add comments if necessary.</p> <p>Click Done to move back to the Goal Rating Screen.</p>	
<p>Once the goal has been updated, you will see the progress bar change to reflect the percentage of goal that has been completed.</p> <p>The status will tell you if you are on track based on the end date of your goal and the progress made to this point.</p> <p>A box is available and optional for comments.</p> <p>Click Save and Continue.</p>	

Step	Steps to Execute
<p>The check in questions will open.</p> <p>There are 3 check-in questions that require an answer.</p> <p>These questions should be answered in a discussion with your manager, and the results should be summarized in the question boxes.</p> <p>When completed, click Submit.</p>	 <p>Step</p> <p>The check in questions will open.</p> <p>There are 3 check-in questions that require an answer.</p> <p>These questions should be answered in a discussion with your manager, and the results should be summarized in the question boxes.</p> <p>When completed, click Submit.</p> <p>Steps to Execute</p> <p>Joe Employee Instructor, ELC 1/1/2018 - 12/31/2018</p> <p>50%</p> <p>Check-in</p> <p>During these conversations, discuss completed tasks/outcomes to date, accomplishments, challenges, and additional support needed. Use the section provided to summarize your conversation.</p> <p>What has been working well? Comments: *</p> <p>What challenges, obstacles or unexpected changes have you experienced? Comments: *</p> <p>Do you require any additional support to achieve your goals? Comments: *</p> <p>Back Save and Exit Submit</p>

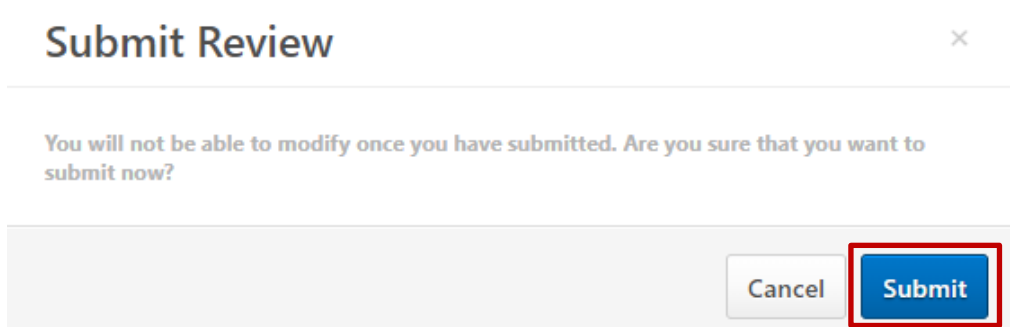
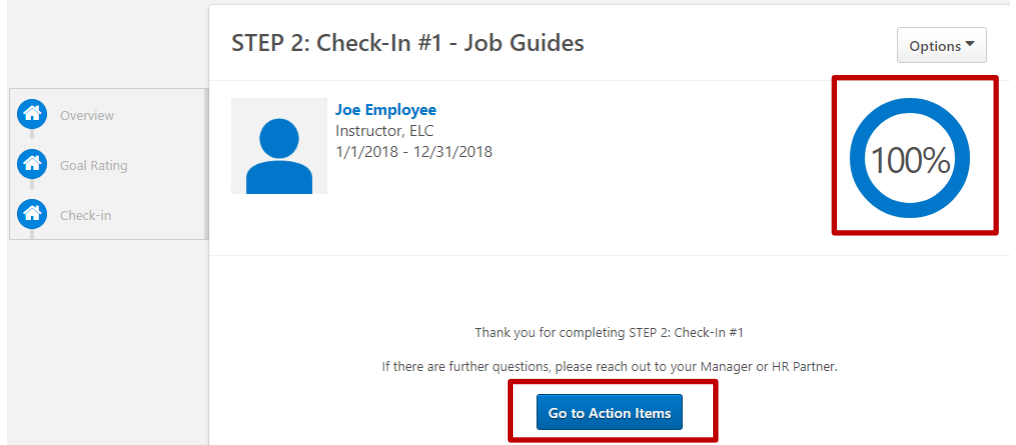
Step	Steps to Execute
<p>A pop up box will appear asking you if you are sure you want to submit the review.</p> <p>When you are satisfied with the check in, click Submit.</p>	 <p>The screenshot shows a 'Submit Review' dialog box with a close button (X) in the top right. The main text reads: 'You will 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 rectangular box.</p>
<p>Step 2: Check-in has been completed</p> <p>You can return to action items, or log out of the system.</p>	 <p>The screenshot shows a completion screen for 'STEP 2: Check-In #1 - Job Guides'. On the left is a navigation menu with 'Overview', 'Goal Rating', and 'Check-in' items. The main content area features a user profile for 'Joe Employee', an Instructor, ELC, with dates '1/1/2018 - 12/31/2018'. To the right of the profile is a circular progress indicator showing '100%', which is highlighted with a red rectangular box. Below the profile, there is a thank-you message: 'Thank you for completing STEP 2: Check-in #1. If there are further questions, please reach out to your Manager or HR Partner.' At the bottom center, there is a blue button labeled 'Go to Action Items', also highlighted with a red rectangular box.</p>

Table 1: Check-in Task