

My HR Connection
Performance Training Guide

Manager – Step 2 Check-in 1 and 2

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

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1. Introduction

1.1. Objectives

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

- Understand the Step 2: 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

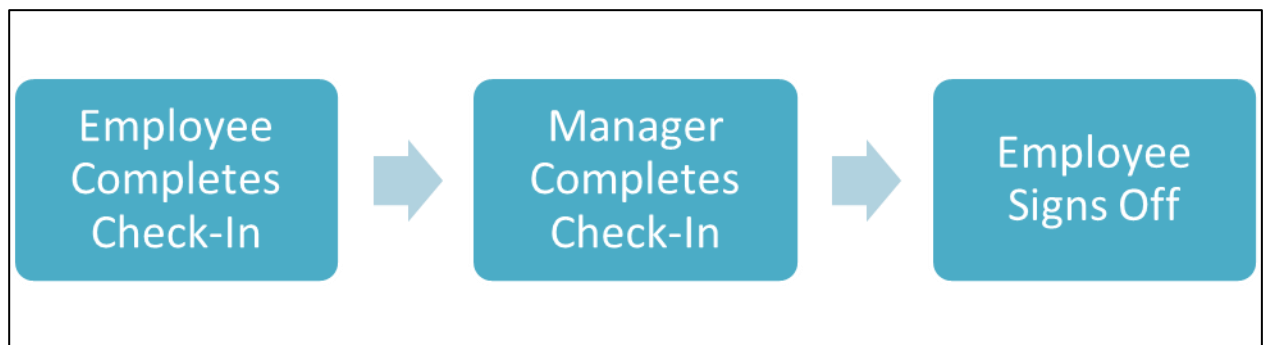

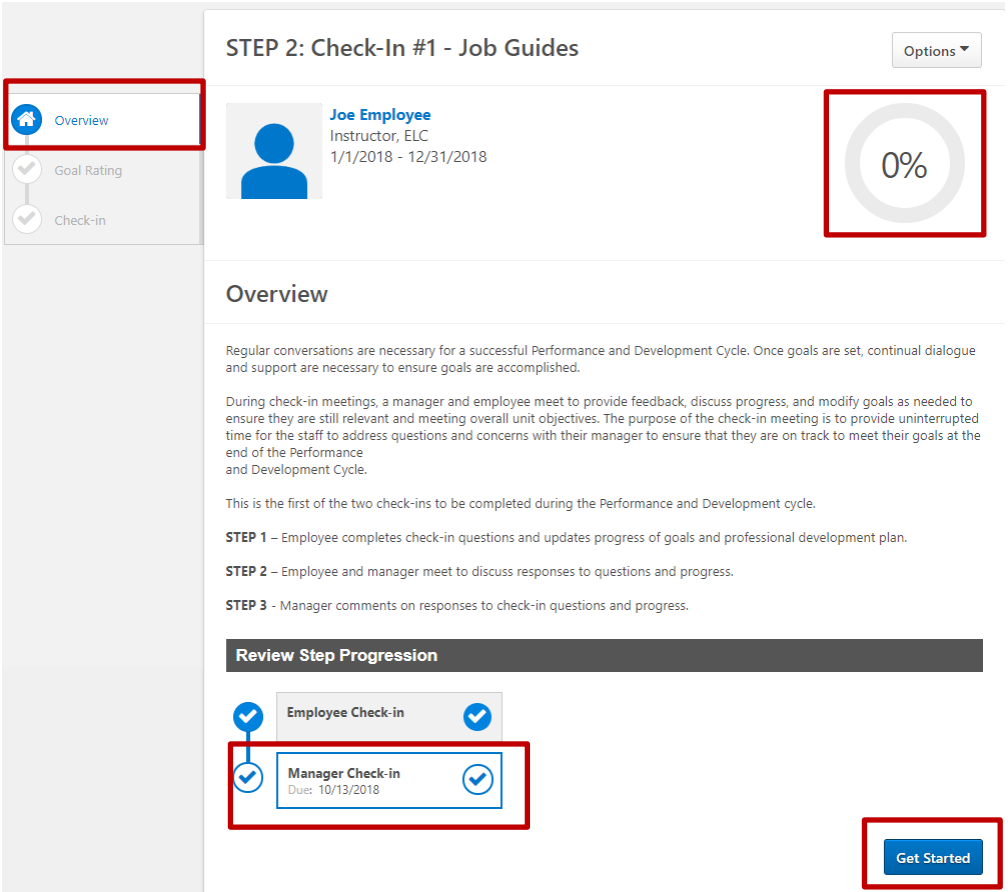


Figure 1: Check In Business Process

2.3. Completing the Check In Task in My HR Connection

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

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>	<p>The screenshot displays the 'Goal Rating' section for 'Joe Employee', an Instructor, ELC, with a period from 1/1/2018 to 12/31/2018. A large circular progress indicator shows 0%. The left sidebar contains 'Overview', 'Goal Rating' (highlighted with a red box), and 'Check-in'. The main content area is titled 'Goal Rating' and includes 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.'</p> <p>Two goal cards are shown, both with 'On Track' status and dates from 1/1/2018 to 12/31/2018:</p> <ul style="list-style-type: none"> Additional Performance Goal: Progress is 0%. Sample Smart Goal: Progress is 37%. The comment field contains: 'Great progress on your goal so far. I look forward to seeing the end result.' <p>At the bottom right, there are three buttons: 'Back', 'Save and Exit', and 'Save and Continue' (highlighted with a red box).</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.

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.

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.

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.

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**

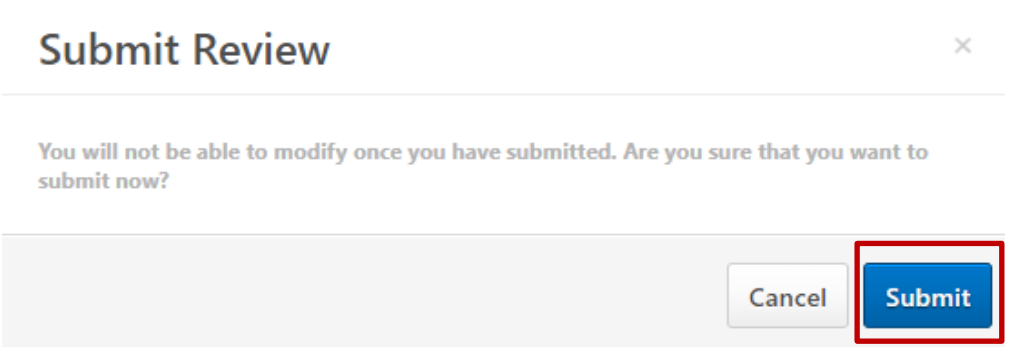
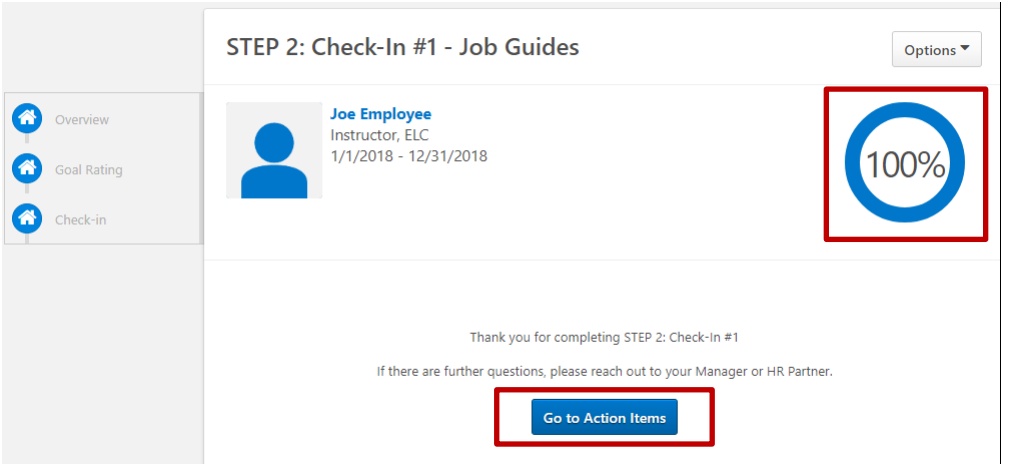
Step	Steps to Execute
6	<p>Once you click submit on the prior page, you will be prompted to submit again.</p> <p>Once you are satisfied with the check in, please Submit.</p> 
	<p>Once the Check In has been completed, you can return to action items and repeat for all other direct reports.</p> 

Table 1: Check In Task