



Workday: Check-In Overview

Check-In *December-January*



Manager Reviews
Goals & Enters
Notes

Manager &
Employee Have
Check-in Meeting

Employee Reviews
& Submits
Acknowledgement



Successfully
Complete!

The following step-by-step guide is designed to walk Employees and Managers through the Performance Management process (CAP) in Workday. This Manual goes through the Employee and Manager's Workday steps for Check-In. Note: Check-In is intended to take place during a joint meeting with employee and manager. Users needing assistance at any point in the process should contact Learning and Development.



Hello There It's Tuesday, November 8, 2022

Awaiting Your Action

- CAP Check-In: Manager Evaluation: Meg Ward**
Inbox - 23 hour(s) ago
- 2022 Review Training - Prevent Discrimination and Harassment Together: Melissa Looney
Inbox - 8 month(s) ago

[Go to All Inbox Items \(2\)](#)

Quick Tasks

- Request Time Off
- Time Off Balance
- My Payslips

Timely Suggestions

- You Have a New Payslip**
Review your payslip information to ensure accuracy. [View Payslips](#)
- Keep Your Home Contact Information Updated**
We would like you to review your Contact information and ensure it's up to date. [Update Contact Info](#)

Top Apps

- Teaching and Advising
- Career
- Recruiting Dashboard
- My Team Management

[View All Apps](#)

HRIS pushes out Check-In to Managers and it appears in the "Awaiting Your Action" section of the Workday landing page. Manager clicks task to initiate Check-In goal review and reflection questions.

MENU  Search    

Inbox

Actions Archive

Viewing: Favorites Sort By: Newest

CAP Check-In: Manager Evaluation: Meg Ward
23 hour(s) ago - Effective 01/31/2023 ★

Complete Manager Evaluation

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward ★    

Review Period 12/01/2022 - 01/31/2023 23 hour(s) ago - Effective 01/31/2023

Managers and employees should have at least one Check-In conversation each year. Check-In is an opportunity for managers and employees to revisit, adjust and/or create additional goals. Managers should check that employees are making progress towards goals, and if not, discuss if lack of progress is due to priorities shifting, lack of support/direction or performance concerns. Employees should use Check-In as an opportunity to note progress on or seek clarification on goals, advocate for resources or support that could help them achieve their goals etc.

***Note:** The Check-In phase of CAP is intended to take place during a joint meeting with employee & manager. Managers are advised to click "Save for Later" after reviewing and/or entering notes until the meeting takes place. Managers can click "Submit" at the end of Check-In, after meeting with employee has occurred. After Check-In is submitted by the managers, employees will have to review and acknowledge Check-In.

Get Started

Review Check-In overview and click "Get Started"

Next, review Check-In directions and "questions to ask" (highlighted below) before entering comments. If you need to add new or additional goals, review goal type descriptions and reflection questions before drafting.

MENU  Search    

Complete Manager Evaluation

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023

- Goals
- Check In Meeting Notes
- Review and Submit

***Note:** The Check-In phase of CAP is intended to take place during a joint meeting with employee & manager. Managers are advised to click "Save for Later" after reviewing and/or entering notes until the meeting takes place. Managers can click "Submit" at the end of Check-In, after meeting with employee has occurred. After Check-In is submitted by the managers, employees will have to review and acknowledge Check-In.

Reviewing goals is an essential component to the CAP Check-In process. The manager begins by reviewing goals below that employee entered and manager approved during Kick-Off. Managers and employees should ask themselves the following Check-In questions when reviewing employee goals and entering comments during their Check-In meeting:

- What goals are completed?
- What goals are still in progress?
- What is getting in the way of achieving goals, if anything?
- How do goals need to be adjusted to align with changing priorities?

When reviewing progress towards goals, managers and employees are encouraged to reflect on not just the success in achieving outcomes, but also the success in demonstrating behaviors through utilizing the ["What" and "How" of Performance Matrix](#).

When revisiting, adjusting and/or creating additional goals, please be aware that there are three categories of goals: Individual Goals, Inclusive Excellence Goals and Developmental Goals. Employees must have at least one goal for each category each annual performance cycle.

***Note:** If goals were not entered in Kick-Off, or you are managing a new employee who recently joined Bentley, please discuss potential goals with the employee and enter them below by clicking the "add" button below. Employees who completed Kick-Off and have at least one goal per category are welcome to edit or add new goals during Check-In as applicable/desired, but are not required to do so.

Please see goal category information and descriptions below:

Individual Goals:
Setting clear expectations around job duties is important for both managers and employees. An individual goal should focus on specific tasks, projects, and actions that employees need to be complete over the next year. Employees should have at least one Individual goal each annual performance cycle. Some questions to consider when creating and reviewing individual goals:

- What tasks, projects, and actions related to your specific role are vital over the next year?
- How will you support departmental operations and goals through your actions and contributions?
- What committees or initiatives (internally within your department, or collaboratively/cross-campus) are you contributing to or assisting with?

Inclusive Excellence Goals:
Bentley University has named [Inclusive Excellence](#) as an enabling feature of our strategic plan, driving our mission to become a more just, inclusive, and equitable campus. Employees should have at least one Inclusive Excellence goal each performance cycle. Some questions to consider when creating and reviewing Inclusive Excellence goals:

- What changes or actions can you take in your role to actively engage historically underrepresented and underserved populations?
- What do you need to learn about communities and identities that are different than your own?
- What tools or skills do you need to learn to engage in brave dialogue across difference?

Developmental Goals:
Employee development is an important part of the CAP process. Employees should have at least one development goal each performance cycle. A developmental goal focuses on an area where an employee can grow over the next year. Some questions to consider when creating and reviewing development goals:

- What are your career ambitions or professional goals?
- What can the manager do to support your development?

Have questions or need support? CAP resources and FAQs can be found [here](#)

Complete Manager Evaluation

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023



Goals

Check In Meeting Notes

Review and Submit

Goal * Normal B I U A : 🔗

Assist with planning and execution of fifth annual community learning conference. Oversee call for proposals process, and increase Bentley presenter submissions through strategic communication, promotion, and partnership.

This goal is in support of following divisional goals:

- Continue to offer opportunities through multiple modalities, based on community feedback, in order to promote engagement in learning and development opportunities.
- Increase alternative engagement opportunities that enhance community connection and interaction.

Edit/Add/Adjust Goals as needed

Category x Individual Goal

Status Not Started

> History

Remove

Goal * Format B I U A : 🔗

Back **Next** Save for Later Close

Review employee entered goals. Edit, add, or adjust to as needed. Change goal category or status as applicable.

Click "Next" to advance to next page, where developmental discussion notes are entered.

Click "Save for Later" to save draft, return, and finalize later during Check-In meeting with Employee.



Complete Manager Evaluation

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023



Goals

Check In Meeting Notes

Review and Submit

Check In Meeting Notes

Managers and employees should have at least one formal Check-In conversation per year and should continue to reference CAP goals and progress in one on one meetings throughout the year. Now that you've discussed goal progress, below are some questions managers and employees can use to structure the Check-In conversation:

When reviewing progress towards goals, managers and employees are encouraged to reflect on not just the success in achieving outcomes, but also the success in demonstrating behaviors through utilizing the "What" and "How" of Performance Matrix.

*Note: The Check-In phase of CAP is intended to take place during a joint meeting with employee & manager. Managers are advised to click "Save for Later" after reviewing and/or entering notes until the meeting takes place. Managers can click "Submit" at the end of Check-In, after meeting with employee has occurred. After Check-In is submitted by the managers, employees will have to review and acknowledge Check-In.

Question

- What is one thing that has gone well for the employee? What is one thing to get better at or improve upon?
- What should the employee start or continue doing to progress towards goals and/or develop professionally? What should the employee stop doing in order to progress towards goals and/or develop professionally?

Manager

Answer

Format | B | I | U | A | : | |

Question

- What experiences and opportunities can be provided to assist the employee in progressing towards their goals?
- What can the manager do to support the employee's development?

Manager

Answer

Format | B | I | U | A | : | |

Review directions and question prompts and enter notes related to Check-In reflection and discussion.

Back

Next

Save for Later

Close

Click "Next" to advance to next page, where the Check-In task is reviewed and submitted.

Click "Save for Later" to save draft, return, and finalize later during Check-In meeting with Employee.



Complete Manager Evaluation |<

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023



- Goals
- Check In Meeting Notes
- Review and Submit

Goals

 

Goal Assist with planning and execution of fifth annual community learning conference. Oversee call for proposals process, and increase Bentley presenter submissions through strategic communication, promotion, and partnership.

This goal is in support of following divisional goals:

- Continue to offer opportunities through multiple modalities, based on community feedback, in order to promote engagement in learning and development opportunities.
- Increase alternative engagement opportunities that enhance community connection and interaction.

Edit/Add/Adjust Goals as needed

Category Individual Goal

Status Not Started

> **History**

Goal Assist with the strategic alignment of training/resources for managers (old and new) through the Fall 2022 rollout of New Manager Orientation Rise Course, alignment/promotion of current managers' training (including new psychological safety session), leveraging of Better Manager data/trainings/support and supporting the evolution of Managers Forum based on manager feedback.

This CAP goal is in support of the following divisional goals:

- Introduce new and revamp existing resources in order to promote new and existing manager development and growth.
- Continue to offer opportunities through multiple modalities, based on community feedback, in order to promote engagement in learning and development opportunities.
- Provide learning opportunities and knowledge management to increase manager support of self and employee wellness

Category Individual Goal

Status Ongoing

> **History**

Submit Save for Later



Click "Submit" once Check-In goal updates and reflection question/responses are reviewed and finalized.

Click "Save for Later" to save draft, return, and finalize later during Check-In meeting with Employee.

Note: After Check-In is submitted by the Manager, it will be routed to Employee to review and acknowledge that Check-In meeting occurred.

Employee's Screen

Here's What's Happening It's Tuesday, November 8, 2022

Awaiting Your Action

CAP Check-In: Employee Acknowledgement: Meg Ward
Inbox - 16 second(s) ago

[Go to All Inbox Items \(1\)](#)

Quick Tasks

[Request Time Off](#)

[Time Off Balance](#)

Timely Suggestions

You Have a New Payslip
Review your payslip information to ensure accuracy

Keep Your Home Contact Information Updated
We would like you to review your Contact Information and ensure it's up to date [Update Contact Info](#)

Performance

Time Off

Pay

Reports for HR Team

[View All Apps](#)

Check-In notification appears in Employee's "Awaiting Your Action" section of the Workday landing page. Click the task to complete the acknowledgement.

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

CAP Check-In: Employee Acknowledgement: Meg Ward
3 minute(s) ago - Effective 01/31/2023

Provide Employee Review Comments

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward



Evaluated By **Melissa Looney**

Review Period 12/01/2022 - 01/31/2023
3 minute(s) ago - Effective 01/31/2023

Please review the notes provided by your manager during the manager/employee check-in. On the last page, you will be prompted to acknowledge the Check-in template.

By checking the box, you are acknowledging a manager/employee check-in meeting occurred.

Comment not required, but can be included as needed.

Have questions or need support? CAP resources and FAQ's can be found [here](#)

Get Started

Review Check-In acknowledgement directions and click "Get Started".



Provide Employee Review Comments

Manager Evaluation: 2022 - 2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023
Evaluated By: Melissa Looney



Summary

Acknowledgement

> History

Goal

Assist with the strategic alignment of training/resources for managers (old and new) through the Fall 2022 rollout of New Manager Orientation Rise Course, alignment/promotion of current managers' training (including new psychological safety session), leveraging of Better Manager data/training s/support and supporting the evolution of Managers Forum based on manager feedback.

This CAP goal is in support of the following divisional goals:

- Introduce new and revamp existing resources in order to promote new and existing manager development and growth.

Category

Individual Goal

Status

Ongoing

> History

Goal

Review Check-In goal updates and reflection question responses and click "Next" to advance.

Back

Next

Close



Provide Employee Review Comments

Manager Evaluation: 2022 -
2023 CAP Check-In: Meg Ward

Actions

12/01/2022 - 01/31/2023
Evaluated By: Melissa Looney



Summary

Acknowledgement

Acknowledgement

Employee

Status * Search

Comment

By selecting this, you are acknowledging a manager/employee meeting occurred.

enter your comment

Process History



Melissa Looney

8 minutes

CAP Check-In: Manager Evaluation Submitted



Meg Ward

CAP Check-In: Employee Acknowledgement- Awaiting Action

Click the drop down menu to select the acknowledgement that the Check-In meeting occurred.

If you include a comment here, it will show on Process History. It is **not** a part of the Check-In

Click "Save for Later" if Check-In Manager has not yet taken place.

Submit

Save for Later

Click "Submit" after acknowledgement is selected to advance to next page.

Check-In notes are now entered, Check-In meeting has occurred and Employee's acknowledgement of the meeting is submitted. Updates and additions made to goals will auto-populate into future CAP Wrap-Up phase. The goals and notes can be viewed or edited throughout the CAP cycle and should be the base of developmental conversations in future 1on1 meetings with staff.