



UKG – Quarterly Check-In

Training Guide -
Employees

2021

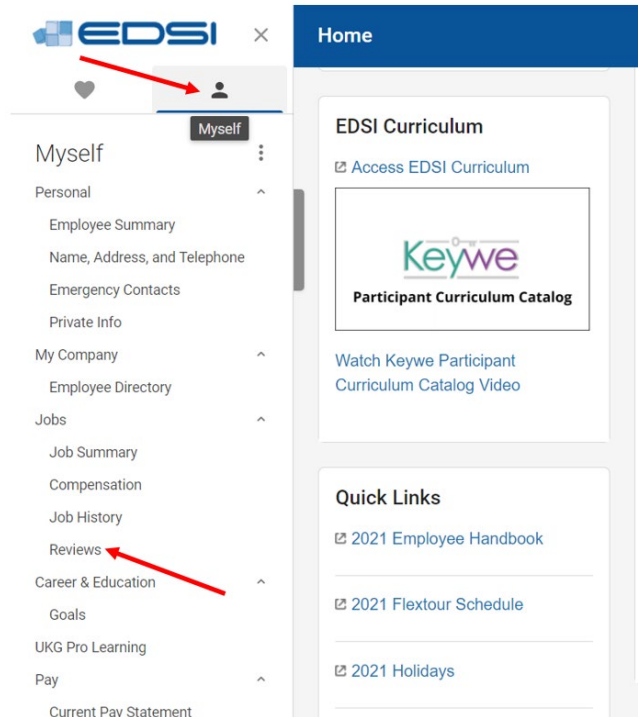


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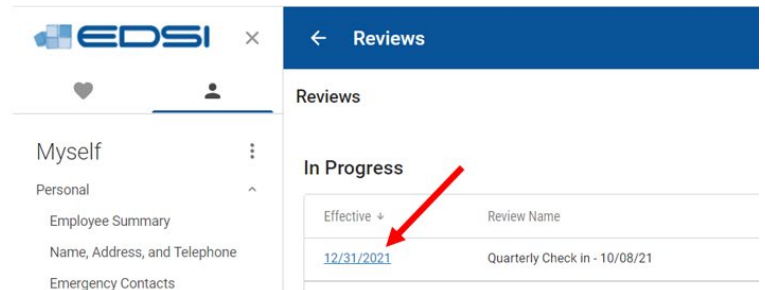
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SECTION 1: COMPLETING QUARTERLY CHECK-IN

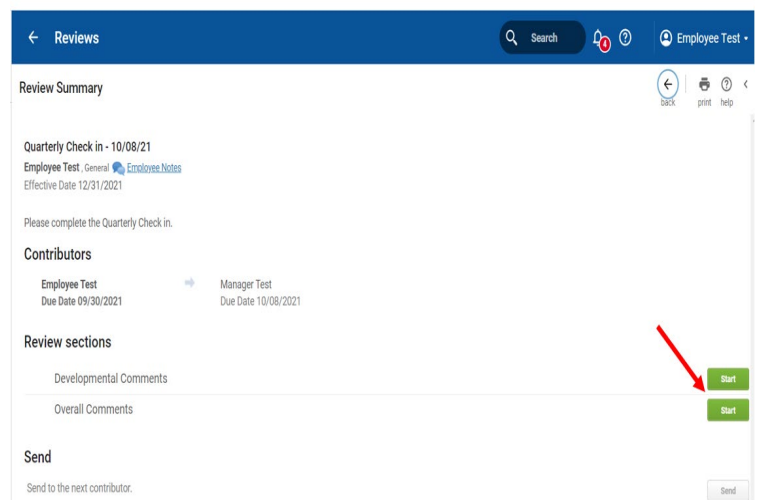
1.
 - Open **Myself** menu
 - Select **Reviews**



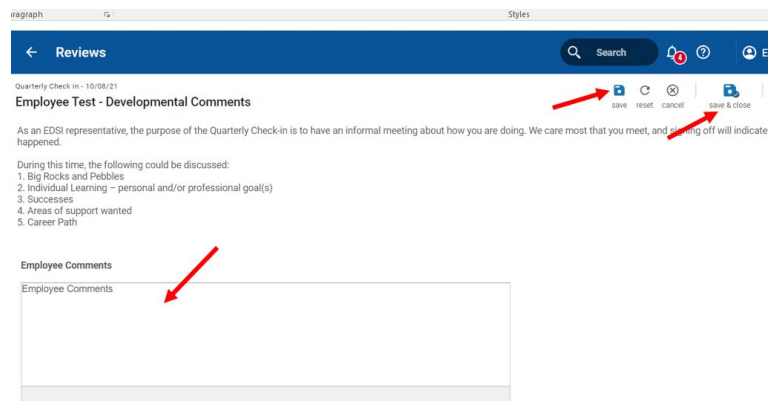
2.
 - Select the **date** to open the check-in



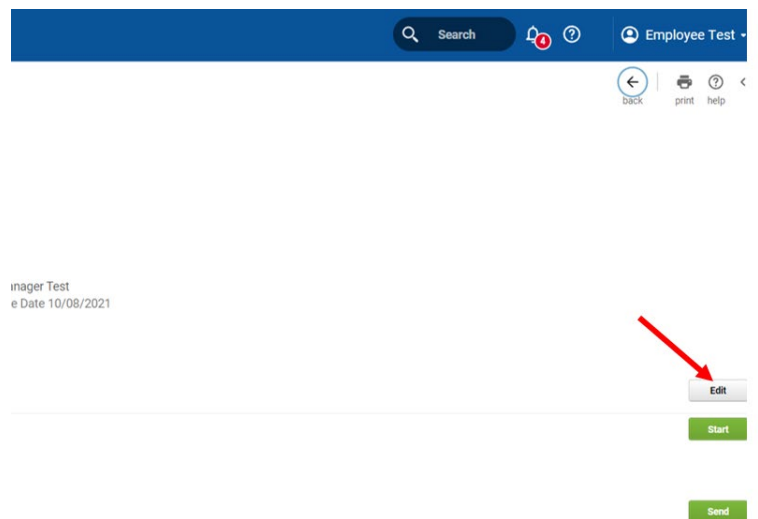
3.
 - There are two sections in your Quarterly Check-In:
 - Developmental Comments
 - Overall Comments
 - Select **Start** to open the Developmental Comments section
 - During the Quarterly Check-In, the following could be discussed:
 - Big Rocks and Pebbles
 - Individual Learning – personal and/or professional goals
 - Successes
 - Areas of Support
 - Career Path



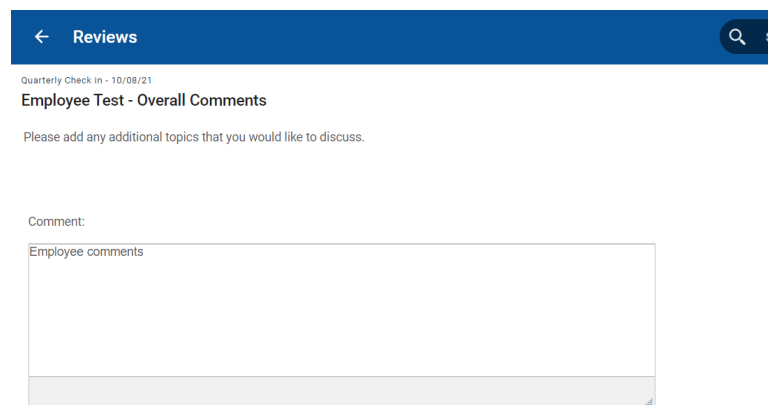
- 4.
 - Enter any comments into the Employee Comments box
 - Select **Save** to continue or **Save & Close** when finished



- 5.
 - Once the Developmental Comments section is complete, the status is changed to "Completed"
 - If changes are needed, select **Edit**

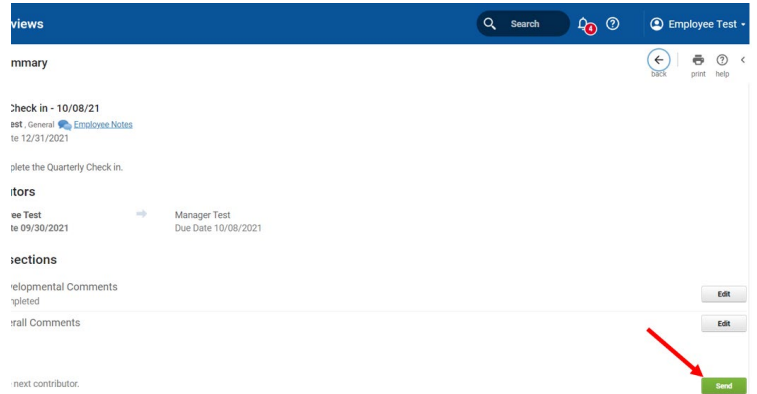


- 6.
 - Select **Start** to open the Overall Comments section
 - Add any additional topics that you would like to discuss in the Comments box
 - Select **Save** to continue or **Save & Close** when finished

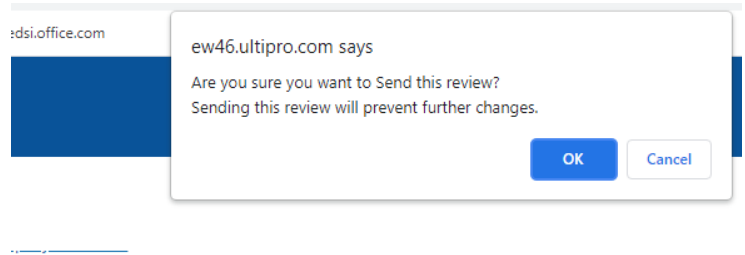


SECTION 2: SUBMITTING QUARTERLY CHECK-IN

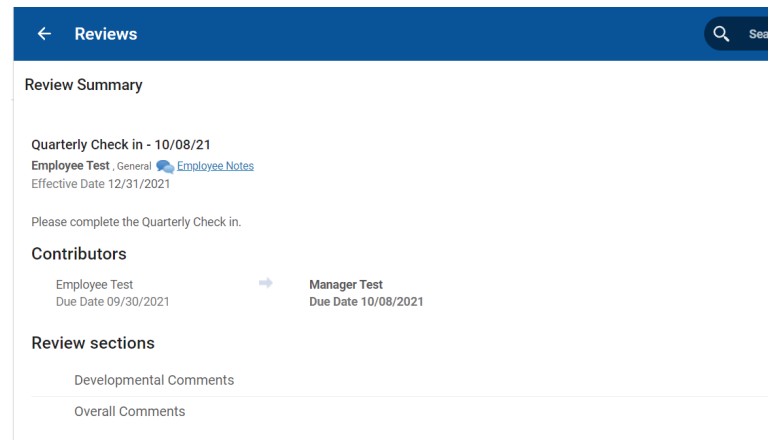
1.
 - Select **Send** to submit completed Check-In to your manager



2.
 - The system asks for confirmation upon submitting review
 - Select **OK** to submit

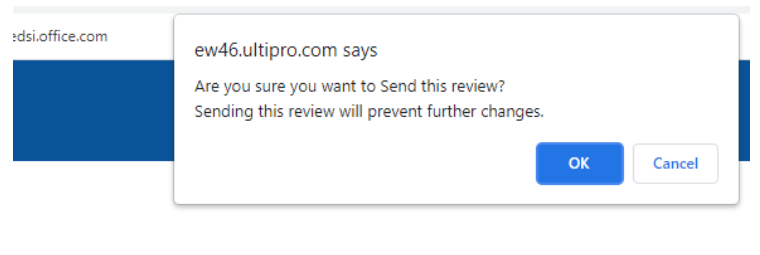
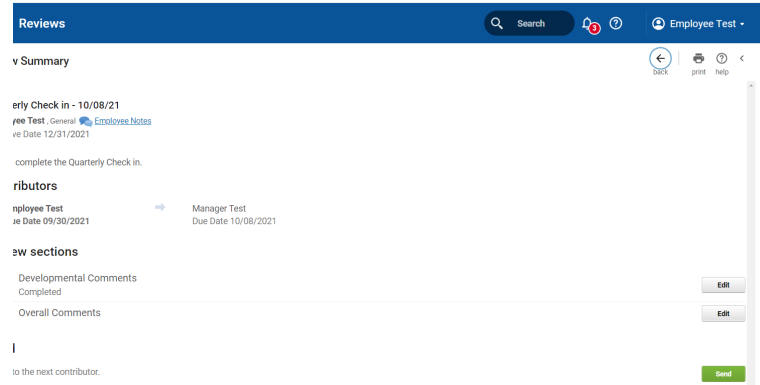


3.
 - The review is now in View Mode only
 - Once the Check-In is submitted, your manager will receive a notification that the Employee Assessment was completed



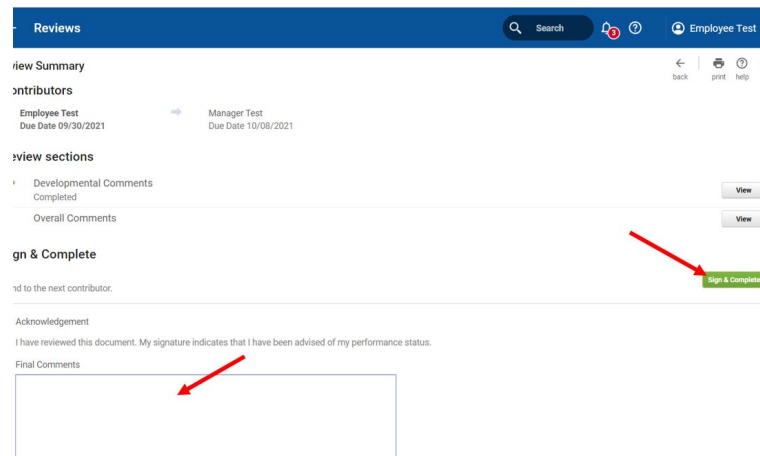
SECTION 3: SENDING CHECK-IN BACK FOR CHANGES

- Note: Your manager should discuss with you the updates they expect
 - You will receive an email notification that the Employee Assessment task has been reassigned back for completion
 - Select **Edit** to update your Check-In
- When updates are completed, select **Send**
 - The system asks for confirmation upon submitting review
 - Select **OK** to submit
 - Check-In will be sent back to your manager for reassessment, along with an email notification

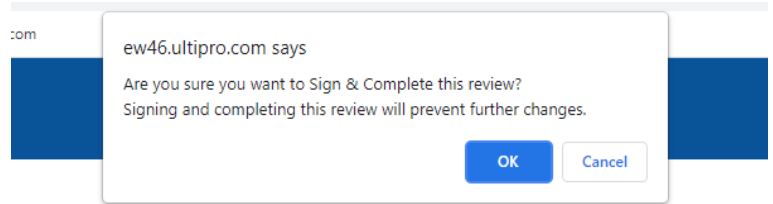


SECTION 4: SIGNING CHECK-IN

- When manager sends Check-In to you for a signature, you will receive an email notification that the Employee Acknowledgement task is available to evaluate and complete
 - If you would like to add comments, use the Final Comments section
 - To sign review, select **Sign & Complete**



2.
 - To finish the signature process, select **OK** to confirm
 - Once you confirm, your manager will receive email notification that your review is signed



SECTION 5: VIEWING CHECK-IN

1.
 - Once your manager signs review, it moves to the History section
 - To view review, open **Myself** menu and select **Reviews**
 - Select the **date** of review you would like to view

