All managers can run two check-in reports in Workday. This document provides information on how to run the reports in Workday and the information contained in each report.

12-MONTH FEEDBACK CYCLE FOR NEW SUPERVISORY MANAGERS

New supervisory managers begin their 12-month cycle the quarter after completing all the required training and yearly planning identified in the PAF Checklist.

The new supervisory manager's start date determines the 12-month feedback cycle. Use the table below to determine the initial quarter and then the 12-month feedback cycle.

Manager's Position Start Date *If the manager's position start date is between…*	**Set Initial Performance Expectations & Goals** *The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by….*	**Initial Observation Begins** *The manager will monitor and observe employee performance during these months for their initial quarter.*	**Conduct & Document Initial Check-in Meeting By** *The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by……*
October 1 – December 31	End of March	April – June	End of July
January 1 – March 31	End of June	July – September	End of October
April 1 – June 30	End of September	October – December	End of January
July 1 – September 31	End of December	January – March	End of April

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12-MONTH FEEDBACK CYCLE FOR NEW EMPLOYEES

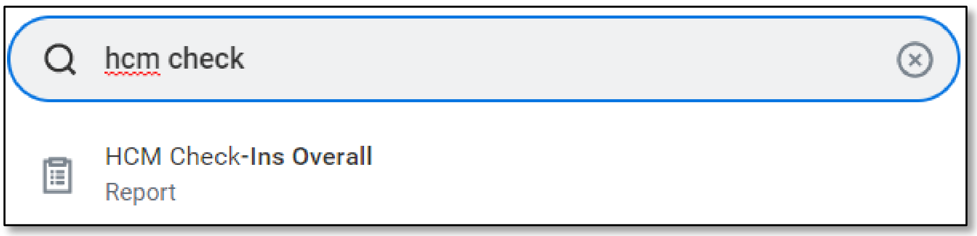
When a new employee is hired, the 12-month feedback cycle will be based on the employee's position start date. The manager will establish initial performance expectations and goals and meet with the employee to discuss them in the quarter the employee was hired.

Employee Position Start Date *If the employees position start date is between…*	**Set Initial Performance Expectations & Goals** *The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by….*	**Initial Observation Begins** *The manager will monitor and observe employee performance during these months for their initial quarter.*	**Conduct & Document Initial Check-in Meeting By** *The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by……*
October 1 – December 31	End of December	January – March	End of April
January 1 – March 31	End of March	April – June	End of July
April 1 – June 30	End of June	July – September	End of October
July 1 – September 31	End of September	October – December	End of January

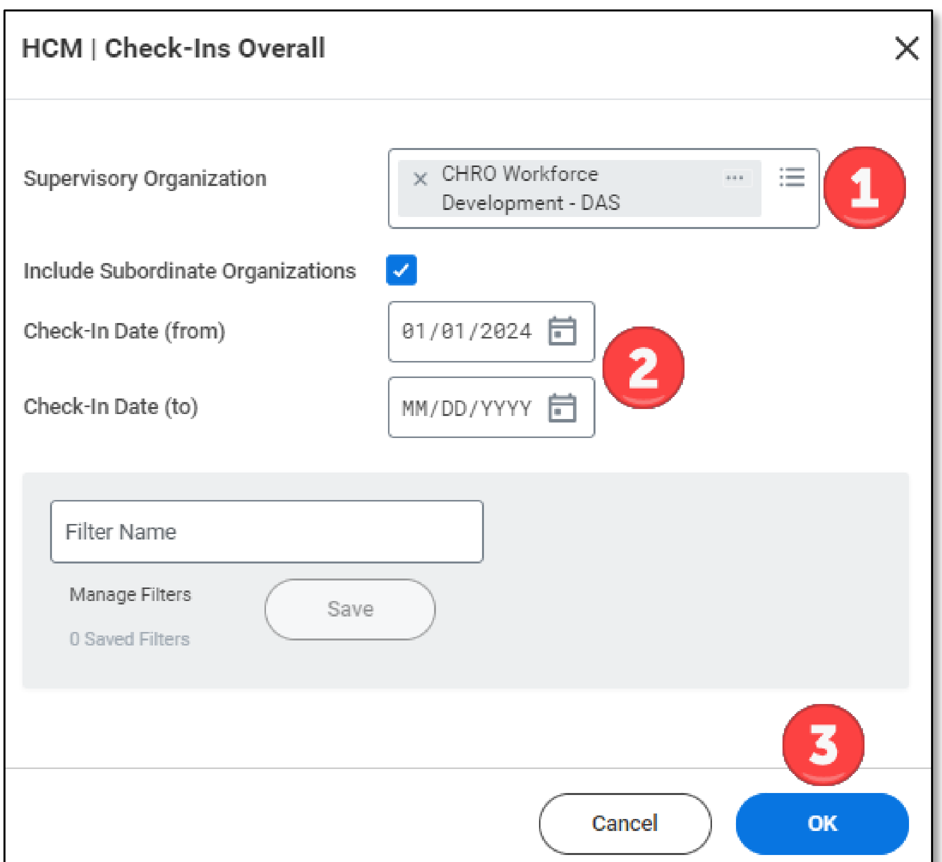
HCM Check-ins Overall Report

All managers will have access to run the *HCM Check-ins Overall* report. If you are a new manager, you will be able to see the check-ins completed by the previous manager for your new employees. You will only be able to see the 'Shared Notes', so if the previous manager had anything in the 'My Notes' section you will not be able to see those.

To run the report, you will need to do the following. In the Search field type in the name of the report.



1. Search for your supervisory organization or by your name in the 'Supervisory Organization' field.
2. Enter the date range for the quarter you would like to see the check-in data.
3. Click 'OK' to run the report.



This section provides a description of the information contained in each column of the report.

COLUMN NAME	COLUMN DESCRIPTION
Check-in Creator	This is the name of the person who created the check-in. The check-in creator should be the manager.
Creator Employee ID	This is the manager's employee ID number (OR#).
Creator Company	This is the manager's current agency.
Creator Supervisory Organization	This is the manager's current supervisory organization.
Creator Job Profile as of Check-in Date	This is the manager's job classification.
Creator Position Start Date	This is the manager's start date for their current position.
Creator is Manager as of Check-in Date	This verifies that the check-in creator is a manager.
Check-in Creator is Check-in Participant's Manager	This will identify if the check-in creator is the participants manager or not. If they are, the field will show "Yes". If not the field will be blank. If they aren't the participants manager you will want to verify why their manager didn't complete the check-in.
Check-in Employee (Participant)	This is the name of the person the check-in was conducted with. It should be the employee's name.
Employee ID	This is the employee's ID number (OR#).
Employee's Current Company	This is the employee's current agency.
Employee Company as of Check-in Date	This is the employee's agency they were working at when the check-in occurred.
Employee Supervisory Organization	This is the employee's current supervisory organization.
Employee Position Start Date	This is the employee's start date for their current position.
Employee Job Profile as of Check-in Date	This is the employee's job classification.
Participant is Manager as of Check in Date	This will identify if the participant is a manager or not. If they are, the field will show "Yes". If not the field

COLUMN NAME	COLUMN DESCRIPTION
	will be blank. This field is included in case the manager has their employee create the check-in.
Check-in Creation Date	This is a system generated field capturing the date the check-in was created.
Check-in Date	This is the ‘Planned For’ date for conducting the check-in. Make sure the ‘Planned For’ date is consistent with the quarter you are performing the check-in.
Check-in Description	All the information added to the description will be displayed in this column. If the check-in is for the yearly planning meeting, then the manager should add the performance expectations and goals in the description field.
Check-in Attachments	If there are any attachments added in the description section of the check-in the name of the attachment will be displayed in this column. If you are viewing the report in Workday then you can open the attachment.
Check-in Topic Name	The Topic Name is essentially the title for the check-in.
Check-in Shared Notes	Any information added to the ‘Shared Notes’ field will be displayed in this column.
Check-in Shared Notes Attachments	If there are any attachments added in the topic section of the check-in the name of the attachment will be displayed in this column. If you are viewing the report in Workday then you can open the attachment.
Check-ins by Date	This is a system generated field capturing all the check-ins for the participant. You can click on the date, and it will take you to the check-in.
Last Functionally Updated	This is a system generated field capturing the date(s) and time(s) the check-in was created and edited.

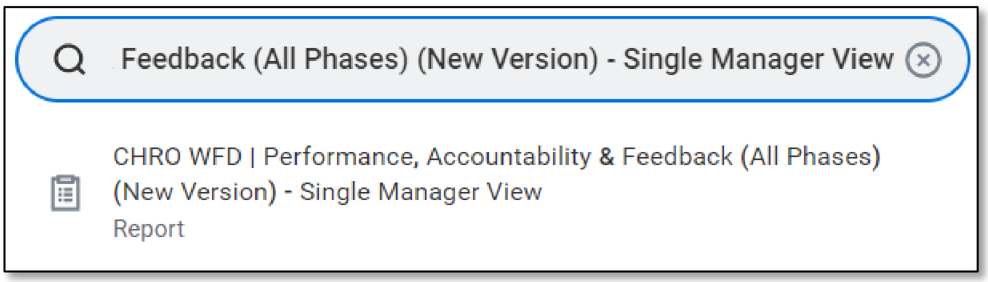
CHRO WFD | Performance, Accountability & Feedback (All Phases)(New Version) – Manager View

All managers will have access to run the *CHRO WFD | Performance, Accountability & Feedback (All Phases) (New Version) – Single Manager View* report.

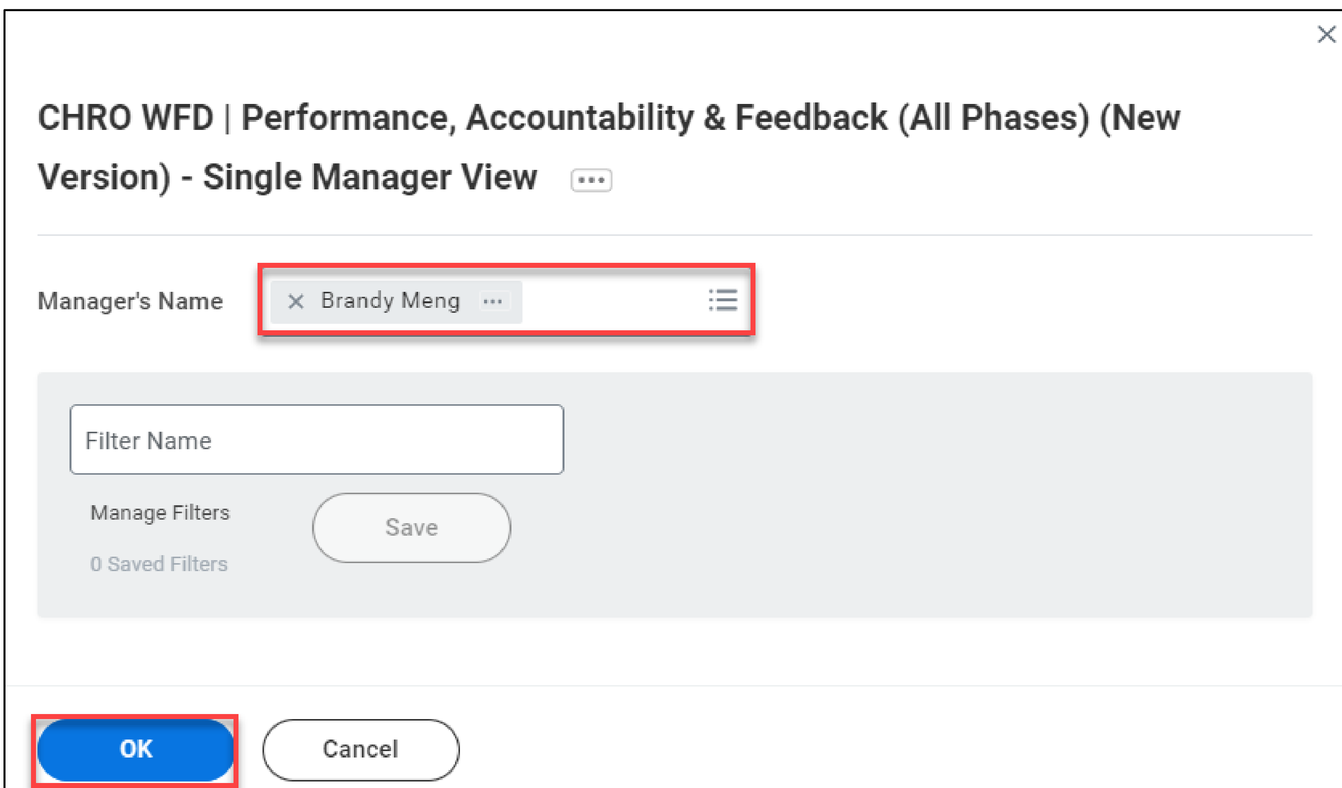
NOTE: If an employee has multiple managers in Workday, this report will not work for those managers. You will need to get this information from your agency HR Department.

To run the report, you will need to do the following.

In the Search field type in the name of the report.



1. Search for your name in the 'Manager's Name' field.
2. Click 'OK' to run the report.



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This section provides a description of the information contained in each column of the report.

COLUMN NAME	COLUMN DESCRIPTION
Supervisory Manager	This is the supervisory manager's first and last name.
PAF Module 1 Completed	If the supervisory manager completed the first online training module, this field will display 'Yes'. If not, then the field will be blank.
PAF Module 2 Completed	If the supervisory manager completed the second online training module, this field will display 'Yes'. If not, then the field will be blank.
PAF Module 3 Completed	If the supervisory manager completed the third online training module, this field will display 'Yes'. If not, then the field will be blank.
PAF Virtual Classroom Session Completed	If the supervisory manager completed the virtual classroom session, this field will display 'Yes'. If not, then the field will be blank.
Employee	This is the employee's first and last name.
Company	This is the employee's agency.
Employee Supervisory Organization	This can be the employee's agency, division, program, or unit.
Employee Job Profile	This is the employee's job classification.
Employee Most Recent Position Start Date	This is the employee's start date for their current position.
Employee Has Multiple Managers	This column will show 'Yes' if there are multiple managers assigned to the employee. To see who is assigned, look at column W 'All Worker's Manager(s). If it is blank, then it means they only have one manager assigned.
All Worker's Manager(s)	The manager(s) name will display in this column. If the employee has multiple managers assigned to them all of them will be listed.
Employee Grace Period	If the field says 'Yes', then the employee's position start date fell between the quarter the report is checking for. If the field is blank, then the manger does not have a grace period to complete the check-in with the employee.

COLUMN NAME	COLUMN DESCRIPTION
Date Next Check in Should Occur - Employee	If the field has a date, then the manager will need to complete the check-in by the date listed. If the field is blank, then the manger does not have a grace period to complete the check-in with the employee.
Employee On Leave	If the employee is out on any type of leave (i.e., FMLA, OFLA, etc.) this field will display 'Yes'. If they aren't on leave, the field will be blank.
Is the Employee in a work out of class?	If the employee is in a work out of class this field will display 'Yes'. If they aren't in a work out of class, the field will be blank.
Is the Employee in a Developmental/Rotation?	If the employee is in a developmental or rotation this field will display 'Yes'. If they aren't in a developmental or rotation, the field will be blank.
Quarter Date Range Column Name Varies *(These columns show the check-ins completed for the current and upcoming quarter)*	This column name will vary based on the date range for the quarter. For instance, if the column name is 2022 August 1 – October 31, the report is showing any check-ins where the 'Planned For' date is between August 1 through October 31, 2022. These columns will always be named one of these date ranges: • [Year] February 1 – April 31 • [Year] May 1 – July 31 • [Year] August 1 – October 31 • [Year] November 1 – January 31
Date Next Quarterly Check-in Due Overall	If the manager or employee is in a grace period then this date should reflect a date outside the current quarter. If neither are in a grace period, then the date should reflect the last day of the current quarter (January 31, April 30, July 31, or October 31).
Date Report Run	This is the date the report was ran in Workday.