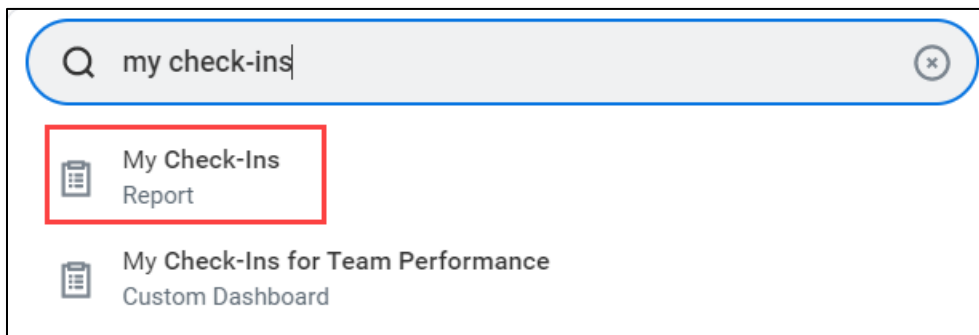


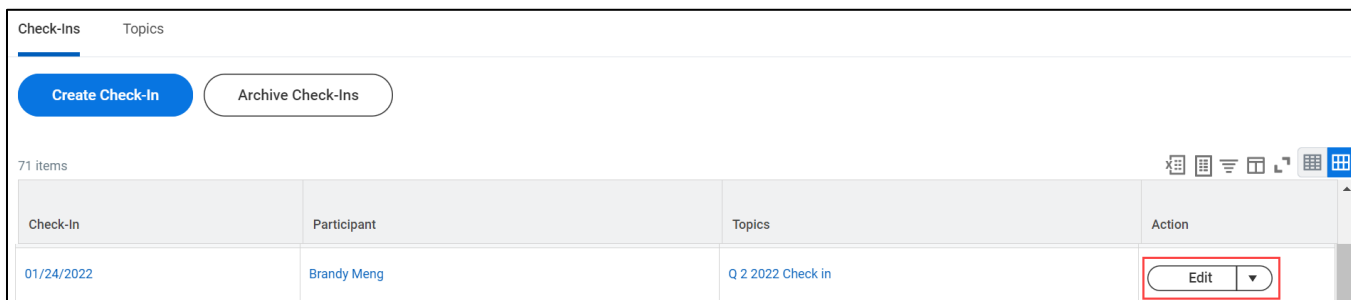
Check-In

Workday does not have an auto set retention schedule so removing check-ins from Workday is a manual process. A check-in creator is the only person who can delete a check-in. Therefore, the agency will need to be responsible for ensuring their managers are aware of the requirement and do this following the appropriate retention schedule. Here are the steps a check-in creator must follow to delete a check-in.

Step 1: In the search bar, type in 'My Check-Ins'. From the drop down, click on 'My Check-Ins'.



Step 2: Find the person whose check-in needs to be deleted according to the applicable retention schedule. Click on **Edit** under the Actions column.



A screenshot of the Workday "Check-Ins" page. The page has a header with "Check-Ins" and "Topics" tabs. Below the header, there are two buttons: "Create Check-In" and "Archive Check-Ins". The main content area shows a table with 71 items. The table has four columns: "Check-In", "Participant", "Topics", and "Action". The first row of the table is highlighted. The "Check-In" column contains "01/24/2022", the "Participant" column contains "Brandy Meng", and the "Topics" column contains "Q 2 2022 Check in". The "Action" column contains an "Edit" button with a dropdown arrow, which is highlighted with a red rectangular box.

Check-In	Participant	Topics	Action
01/24/2022	Brandy Meng	Q 2 2022 Check in	Edit

Step 3: Scroll down to **Manage Topics** and click on the trash can icon next to the topic.

Edit Check-In

Participant * Brandy Meng

Notify Participant

Planned for * 01/24/2022

Description

Format **B** *I* U **A**

Q 2 2022 Check in

> Attachments

Manage Topics

+ Add

Q 2 2022 Check in

Changes to this topic apply across all Check-Ins.

Select Existing Topic

Topic Name * Q 2 2022 Check in

Notes

Step 4: The topic will no longer appear in the check-in. Click **Save**.

Edit Check-In

Participant * Brandy Meng

Notify Participant

Planned for * 01/24/2022

Description

Format ▼ **B** *I* U A ▼ ☰ 🔗 ↕

Q 2 2022 Check in

> **Attachments**

Manage Topics

+ [Add](#)

Save

Cancel

Step 5: You will be taken back to the main check-in page. Click on the **Topics** tab. Find the topic you want to delete. Click the dropdown next to the **Edit** button. Click on **Delete**.

My Check-Ins

Worker

Check-Ins Topics

Create Topic Archive Topics


76 items

Topic	Participant	Associated Check-Ins	Action
Q 2 2022 Check in	Brandy Meng		Edit ▼
2020 Q2 Performance Check in		07/29/2022 10/28/2020	Edit View Delete

Step 6: You'll be taken to the Delete Check-in Topic page. If you don't want the person notified, uncheck the Notify Participant checkbox. Click **Delete**.

You will be taken back to the main check-in page and you should no longer see the check-in or the topic on the Topic tab.

Delete Check-In Topic

 Q 2 2022 Check in 

Are you sure you want to delete this topic?

Notify Participant

Topic Q 2 2022 Check in

Created by

Participant

Associated Check-Ins (empty)

Created On 01/19/2022

Last Updated 09/15/2022

Notes

Shared Notes This is time for us to check-in. I have created an initial set of items for discussion. Feel free to add additional ones as you see fit. This is a living document and will improve/evolve over time to help us work even better together.

Feedback & communication (How are things? ...)

Delete **Cancel**