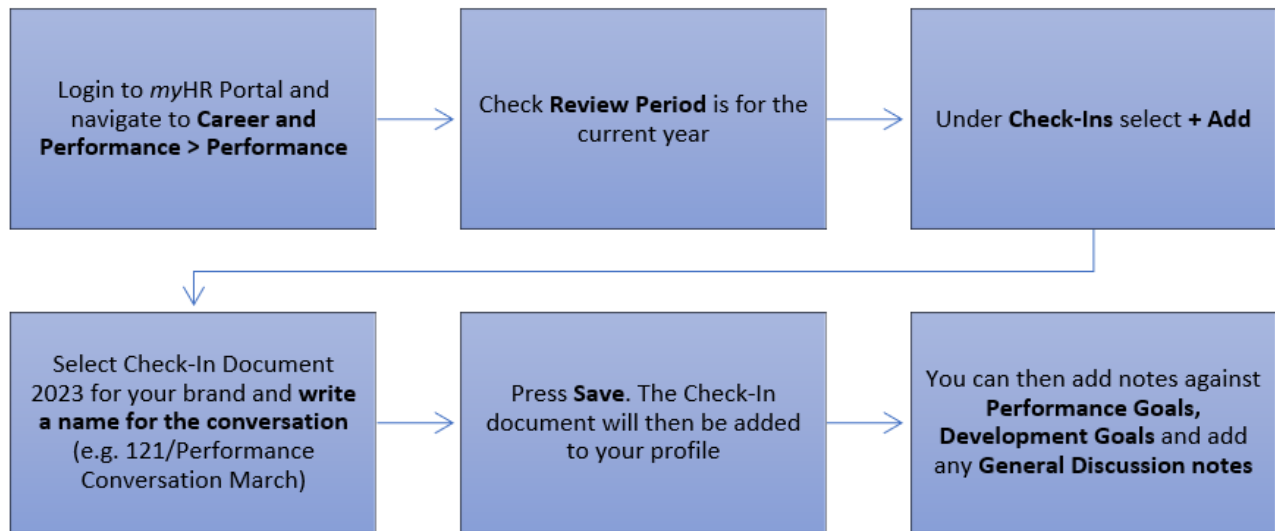


How to add a check-in document

The objective of this Quick Reference Guide is to explain how to add a check-in document to record any 1-2-1's or performance conversation on myHR Portal. set up your Performance Goals in myHR portal. Check-in documents can be added by Employees and Line Managers at any point throughout the performance year.

Quick Guide:



Detailed Guide:

1. Login to *myHR* Portal and navigate to **Career and Performance > Performance**.
2. Ensure **Review Period** is for the **current performance year**.
3. Under **Check-Ins** select **+ Add**.

Details

Review Period
Carnival Performance 2023

* Template
CUK Check-In Document 2023

* Name
121/Performance Conversation March

* Manager
Joe Batten

* Date
01-Mar-2023

Save Cancel

Review Period
Carnival Performance 2023

Check-Ins

+ Add

Sort By
Date - Latest to Oldest

4. You will then see a **Details** page. Under template, select **Check-In Document**. Create a **Name** for your document (e.g., 121/Performance Conversation March).
5. Once you are happy, press **Save**.

6. You can then add notes against **Performance and Development Goals** using the **+Add** button.

Performance Goal Discussion Topics

+ Add

Sort By
Display Sequence

My Performance Goal	Notes added in this check-in: 0	Status
CUK_Performance Goal Plan 2023	Not started	

Development Goal Discussion Topics

+ Add

Sort By
Last Updated - Latest to Oldest

Test	Status	Notes added in this check-in: 0	Completion Percentage
In progress			0%

How to add a check-in document

7. If you select a **Performance or Development Goal** you can **edit your goal** or **add notes** in the notes section.

The screenshot shows a form titled 'Goal Basic Info' with sections for 'Target Outcomes', 'Shared With', and 'Alignment'. The 'Notes' section is highlighted with a blue border and contains a text area with the prompt 'What do you want to say?'. To the right of the text area are 'Save' and 'Cancel' buttons. Below the text area, it says 'Paragraphs: 0, Words: 0, Characters (with HTML): 0'.

8. You can also add any general comments to the **General Discussion Topics** box at the bottom of the page.

The screenshot shows a form titled 'General Discussion Topics' with a 'Save' and 'Cancel' button. Below the button is a dropdown menu labeled '*General Discussion Topic' with 'New topic' selected. There is a text input field labeled 'Enter topic name' and a larger text area labeled 'Note'. At the bottom, it says 'Paragraphs: 0, Words: 0, Characters (with HTML): 0'.

9. Once you have finished, select the **< arrow at the top left**. The Check-In document will then **appear under Check-Ins on your Performance page**.

The screenshot shows a list titled 'Check-Ins' with a '+ Add' button and a sort dropdown set to 'Date - Latest to Oldest'. The list contains one entry: '121/Performance Conversation March' with a sub-entry 'CUK Check In Document V2'. To the right, it says 'Discussed With: Joe Batten' and '01-Mar-2023'. There is a three-dot menu icon to the right of the entry.

10. Any addition **Check-In Documents** you add will also appear here.

11. Your **mid-Year and Year-end documents** will appear below this, under **Performance Documents**.