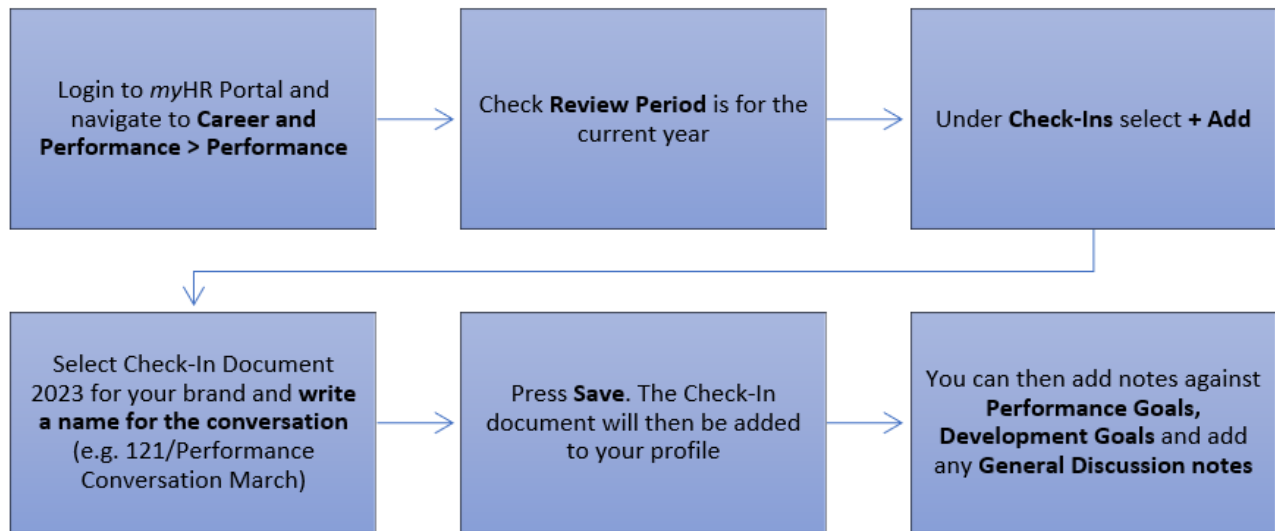## How to add a check-in document

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:

Login to *my*HR Portal and navigate to **Career and Performance > Performance**	Check **Review Period** is for the current year	Under **Check-Ins** select **+ Add**
Select Check-In Document 2023 for your brand and **write a name for the conversation** (e.g. 121/Performance Conversation March)	Press **Save**. The Check-In document will then be added to your profile	You can then add notes against **Performance Goals, Development Goals** and add any **General Discussion notes**

Detailed Guide:

1. Login to *my*HR Portal and navigate to **Career and Performance > Performance.**

2. Ensure **Review Period** is **for the current performance year.**

3. Under **Check-Ins** select **+ Add.**

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.

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

Goal Basic Info

Target Outcomes

Shared With

Alignment

Notes

Save   Cancel

What do you want to say?

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.

General Discussion Topics

Save   Cancel

*General Discussion Topic

New topic

Enter topic name

Note

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.**

Check-Ins   + Add   ∧

Sort By   Date - Latest to Oldest

121/Performance Conversation March   Discussed With   Joe Batten   ...
CUK Check In Document V2   01-Mar-2023

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**.