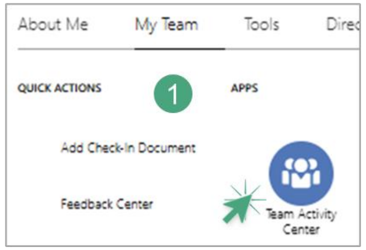
How to Create a Check-In for an Employee

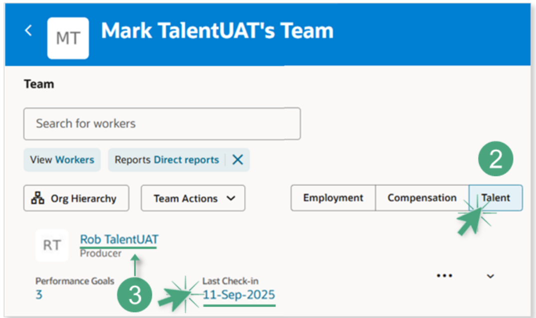
Gallagher | myPerformance

PART 1:

Schedule Check-In

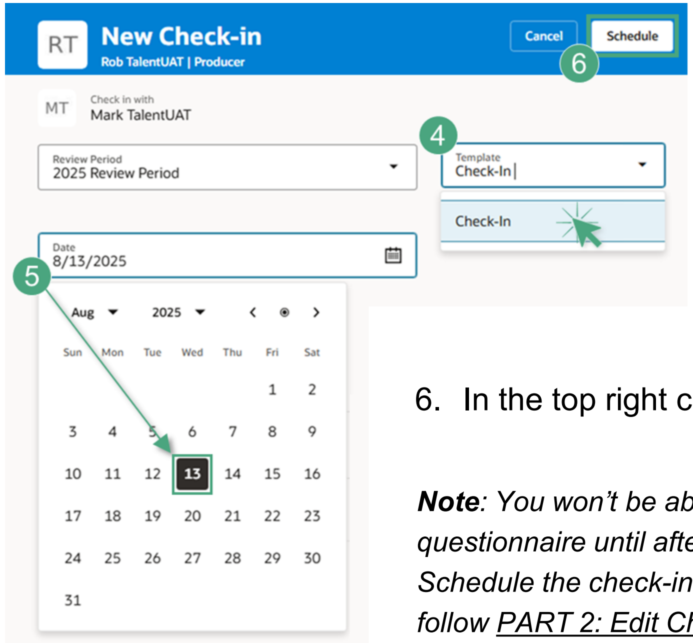
1. From myHR home page, go to “My Team” and click “Team Activity Center”





2. Click “Talent”

3. Find the employee , then select the hyperlink under “Last Check-in” *(may show “None” or a date)*



4. For the “Template” drop-down, select “Check-In”

5. Pick the date for the check-in

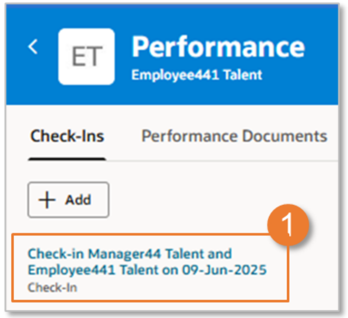
6. In the top right corner, click “Schedule”

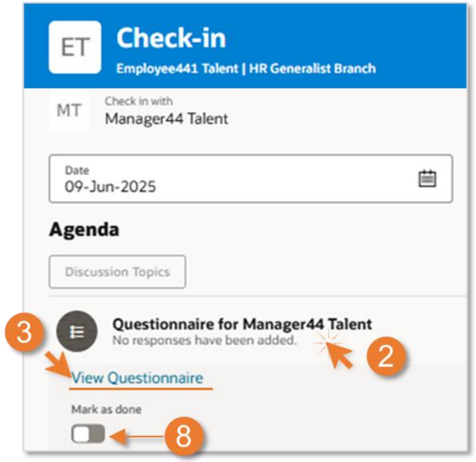
Note*: You won’t be able to add notes or edit the questionnaire until after you click “Schedule.” Schedule the check-in first, then reopen and follow* *PART 2: Edit Check-In Document*

PART 2:

Edit Check-In Document

1. Select the check-in document you wish to edit
2. Click on “Questionnaire for Manager”
3. Select “View Questionnaire”





In the side panel pop-up…

4. Add notes for the upcoming check-in (your employee will see these)
5. Upload relevant documents via drag-and-drop, file upload, or pasted URL
6. **Optional:** Chose their current performance status
7. Select “Save” in the bottom-right corner
8. Toggle “Mark as Done” if finished entering notes
9. In the upper right corner, select:
   - “Update” to save changes
   - “Cancel” to discard
   - “Delete” to permanently remove the check-in.