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What is the purpose of quarterly check-ins?

Quarterly check-ins are a way for you to understand and discuss your performance, accomplishments, and progress towards your goals with your supervisor. The goals you enter into Workday may even change over time, and it is important to keep them up to date since they will automatically appear in your annual employee performance review for evaluation.

Updating Your Goals

Where your goals are in the approval process determines how you will go about updating them in Workday.

1. Begin by accessing Workday. (Visit the Accessing & Bookmarking Workday guide for details.)
2. Check your Workday inbox to see if the goal-setting task is there. To do so, click the Inbox icon in the upper right of your screen.
   - If the goal-setting task is there, use this task to enter all of your goals – including the updates – and submit them to your supervisor. This is needed to create the necessary connection between your goals and the annual employee performance review.
   - If the goal-setting task is not there, continue to the next step.
3. If the goal-setting task is not in your Workday inbox, go to the Talent and Performance application. One way to get there is from your Workday home page.
4. Look under the Track My Goals section.
   - If the Track My Goals section is blank, your goals have not yet been approved by your supervisor. You can ask your supervisor to send your goals back to you. Your returned goals will then appear as a task in your Workday inbox so you can edit and re-submit them.
   - If your goals appear within the Track My Goals section, continue to the next step.
5. If your goals appear within the Track My Goals section, click View More at the bottom of this section.
6. Update your goal(s) as needed. It is suggested to explain goal updates in the Description field to help when completing your annual performance review.
   - Note: Changing a goal’s status to “No Longer Relevant” will prevent the goal from automatically appearing in your annual employee performance review for evaluation.
7. Submit your edits to your supervisor for approval.

You can also update your goals, if needed, when completing your annual employee performance review at the end of the performance cycle.

For additional help, visit our Workday User Support site.
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Entering Your Accomplishments

The quarterly check-in task will appear in your Workday inbox at the beginning of each quarter as a means for you to record your accomplishments as they occur throughout the quarter. The accomplishments you enter will automatically appear in your annual employee performance review.

1. Go to your Workday inbox and select the quarterly check-in self-evaluation task. (There are several ways to do this. One way is to click on the quarterly check-in entry from the Inbox section of your home page.)
2. Determine which type of editor you want to use: Guided (step by step through task) or Summary (entire task on one page).
3. Click the Add button under the Accomplishments section.
4. Enter your accomplishments for the quarter thus far.
5. Click the Save for Later button.
6. Your draft is now available in your Workday inbox. Repeat the previous steps to continue adding your accomplishments to this draft throughout this quarter.
7. Once ready, record your quarterly check-in and submit to your supervisor.

Recording Quarterly Check-ins

Not only is the quarterly check-in task a way to record your accomplishments, it’s also a way for you to self-evaluate your performance throughout the quarter. The self-evaluations you enter will automatically appear in your annual employee performance review.

1. Go to your Workday inbox and select the quarterly check-in task. (There are several ways to do this. One way is to click on the quarterly check-in entry from the Inbox section of your home page.)
2. If needed, complete entering your accomplishments for this quarter.
3. You can also enter a self-evaluation for your performance this quarter.
4. Click the Submit button.
5. A confirmation message appears and a task is automatically sent to your supervisor. It is recommended for you and your supervisor to collaborate, discuss, edit, and review the check-in, accomplishments, and summaries before your supervisor approves.

You can make modifications to your submitted check-ins, if needed, when completing your annual employee performance review at the end of the performance cycle.