



## INSTRUCTIONS:

This electronic form is to be used until the new online staff performance system is implemented in the fall of 2017. Before completing this form, employees and managers should visit the ACHIEVE staff performance management website at [hr.uci.edu/partnership/performance](http://hr.uci.edu/partnership/performance) to download the check-in form and view helpful informational videos, eCourses and job aids.

### Step 1 – Set Goals

- In July/August, employee and manager meet in person to discuss and agree upon between one and five performance goals. Goals do not have to be completed within one quarter; they can span across multiple quarters.
- Either employee or manager enters agreed upon goals and due dates onto check-in form. Sub-goals/KPIs/milestones, % weight and % complete may also be entered for each goal, if desired.
- Either employee or manager copies employee's current CEMRP annual individual objectives from HR Connect/PeopleSoft to Goals Section of the check-in form. While HR Connect will continue to be the system of record for the formal establishment of CEMRP annual incentive objectives, as well as the evaluation and approval of objectives results, including them in quarterly check-in discussions will help ensure progress is reviewed regularly throughout the fiscal year.
- After employee or manager completes the document, it is saved and sent to the other.
- If changes are needed during quarter, simply make change, save and send to the other. Changes to CEMRP individual objectives can only be made by going through the Medical Center goal change process. CEMRP objectives cannot be changed via the quarterly check-in.
- Manager schedules October check-in discussion.

### Step 2 – Complete Check-In Form

- Approximately two weeks before check-in discussion, employee completes self check-in. Provides progress for each assigned goal/CEMRP objective, including using drop-down to enter status, and enters response to each discussion question. Input on goals/CEMRP objectives progress and discussion questions should be complete but not necessarily lengthy or formal. When complete, document is saved and sent to manager.
- After employee completes self check-in, manager completes employee check-in. Reviews employee's input and enters feedback on goals/CEMRP objectives and discussion questions including additional manager's question. Input on goals/CEMRP objectives progress and discussion questions should be complete but not necessarily lengthy or formal. When complete, document is saved and sent to employee.
- Both employee and manager review final check-in, print and bring to check-in discussion.

### Step 3 – Meet for Check-in Discussion

- In October, employee and manager hold in-person check-in discussion.
- If changes are needed as a result of discussion, either employee or manager revises document, saves and sends final version to the other.
- Once finalized, the manager uploads the final check-in document to HR Connect by logging in to HR Connect and clicking on the Manager tab. From the Manager Menu, click on the "Documents to Complete" under the Team Evaluations. This will bring up the current documents. Click on the "UCI Check-In Form" link. This will take you to the Document Details page. Click on the "Start" link on the "Self-Evaluation" line to open the document. Click on the "Add Attachment" button and then browse to where the check-in document is saved, click on it and then click the "Open" button. Click on the "Upload" button. This will attach the document to the employee. From the pull-down menu labeled "Attachment Audience", select "EE and Mgr" and then click the "Review Held" button; this will make it available for the employee to acknowledge. Once the employee has acknowledged the document, click the "Submit" button.
- If desired, input on CEMRP annual individual objectives may be copied from the final quarterly check-ins to HR Connect/PeopleSoft.

**Information regarding the January 2018 check-in will be released in the fall prior to implementation of the new online system.**

**Should you have questions regarding the interim check-in form, please contact your Human Resources Business Partner.**



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**Employee Name:**

**Manager Name:**

**Employee Title:**

**Manager Title:**

**Department:**

**Check-in Period:**

**GLOSSARY:**

**KPIs (Key Performance Indicators)**

Quantifiable measures of performance used to gauge progress toward a strategic goal such as \$ decrease in operating cost, % increase in issues resolved, or increase in brand awareness.

**Enterprise Contributor**

Enhances individual work by soliciting contributions from others, and enhances others' work by contributing to their success to more effectively meet organizational goals.

**Innovation**

Uses knowledge and professional experience to improve efficiencies and work outcomes.

**Job Mastery**

Demonstrates knowledge, skills, and abilities that result in high performance and contributions.

**Goal Accomplishment**

Achieves organization, department and individual work goals.



## SECTION 1 | GOALS PROGRESS

### Goal #1:

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Due Date:

% Weight:

% Complete:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



**Goal #2:**

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Due Date:

% Weight:

% Complete:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



**Goal #3:**

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Due Date:

% Weight:

% Complete:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



**Goal #4:**

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Due Date:

% Weight:

% Complete:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



**Goal #5:**

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Sub goal/Key performance indicator/Milestone, etc (maximum 180 characters)

Due Date:

% Weight:

% Complete:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



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Per the Instructions Section, copy current CEMRP annual individual objectives from HR Connect/ PeopleSoft to this section of the check-in form. While progress toward CEMRP individual objectives may be documented here, HR Connect will continue to be the system of record for the formal establishment of CEMRP annual incentive objectives, as well as the evaluation and approval of objectives results. Input from this section may be copied to HR Connect/PeopleSoft, if desired.

**CEMRP Individual Objective #1 (maximum 180 characters):**

Threshold (maximum 180 characters):

Target (maximum 180 characters):

Outstanding (maximum 180 characters):

Due Date:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)





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**CEMRP Individual Objective #2 (maximum 180 characters):**

Threshold (maximum 180 characters):

Target (maximum 180 characters):

Outstanding (maximum 180 characters):

Due Date:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



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Per the Instructions Section, copy current CEMRP annual individual objectives from HR Connect/ PeopleSoft to this section of the check-in form. While progress toward CEMRP individual objectives may be documented here, HR Connect will continue to be the system of record for the formal establishment of CEMRP annual incentive objectives, as well as the evaluation and approval of objectives results. Input from this section may be copied to HR Connect/PeopleSoft, if desired.

**CEMRP Individual Objective #3 (maximum 180 characters):**

Threshold (maximum 180 characters):

Target (maximum 180 characters):

Outstanding (maximum 180 characters):

Due Date:

Status:

**Employee Feedback:** (maximum 1800 characters)

Status:

**Manager Feedback:** (maximum 1800 characters)



## Section 2 | Discussion Question

1. What are you most proud of and what additional accomplishments have you achieved in this check-in period?

**Employee Feedback:** (maximum 1150 characters)

**Manager Feedback:** (maximum 1150 characters)

2. How have you performed as an enterprise contributor and demonstrated innovation during this check-in period?

**Employee Feedback:** (maximum 1150 characters)

**Manager Feedback:** (maximum 1150 characters)



3. What additional information, knowledge, skills, resources do you need to master your job and accomplish goals?

**Employee Feedback:** (maximum 1150 characters)

**Manager Feedback:** (maximum 1150 characters)

4. What would increase your job satisfaction and success?

**Employee Feedback:** (maximum 1150 characters)

**Manager Feedback:** (maximum 1150 characters)



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5. As a manager, what am I doing to maximize your and our team's talent and organizational capabilities to help the organization achieve its strategic goals? (to be answered by manager, only)

**Manager Feedback:** (maximum 1800 characters)