

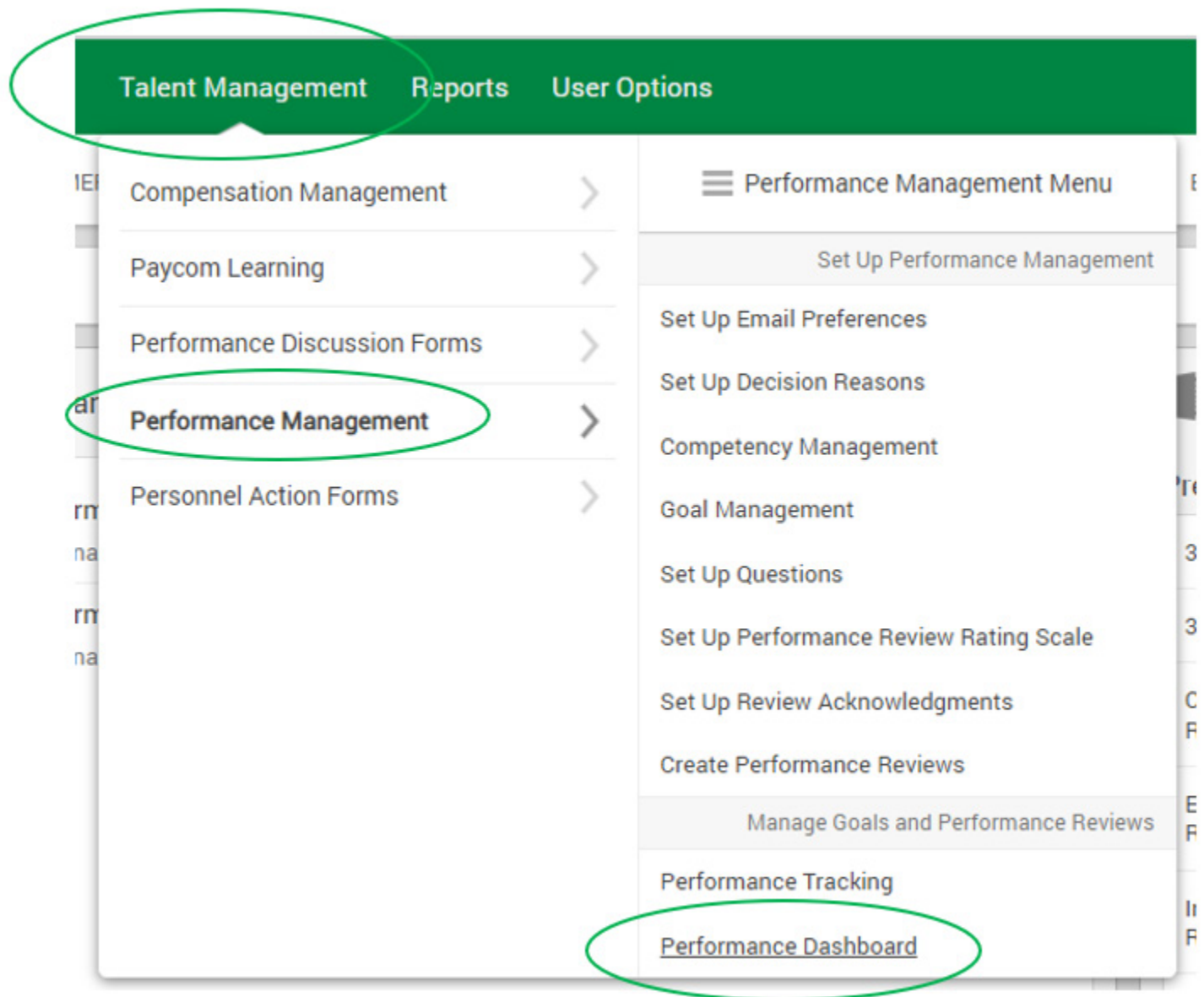
MANAGERS



QUARTERLY CHECK-INS IN PAYCOM

Starting in **June of 2023**, Quarterly Check-Ins (QCI) will now be completed in **Paycom!**

To complete your team's Quarterly Check-ins, navigate to Talent Management → Performance Management → Performance Dashboard:



From here, make sure the review plan of **“Quarterly Check-In”** is selected from the Active Reviews dropdown:

Level 1 Clinical Champions

- Supervisor Review
05/01/2023 - 05/31/2023
Ended
- Employee Review
05/01/2023 - 05/31/2023
Ended

← 1/3 →

There are no goals to approve

Active Reviews (3)

Review Plan *
Quarterly Check-In (TEST 1)

Occurrence 1 (04/01/2023 - 06/30/2023) Show Graphs

Supervisor Review

Not Started
In Progress
Finalized
5 Employees in Review

No overall scores to show

Click on the **name** of the employee you want to complete the QCI for:

Not Started	Both Reviews	Churchill, Susan	In Progress	Both Reviews	Churchill, Susan
<input type="checkbox"/> SC	CHURCHILL, SUSAN C (A5MS) ARD	Actions			
Employee Review In Progress	Employee Can See Both Reviews	Supervisor Not Assigned	Supervisor Review Not Started	Supervisor Can See Both Reviews	Waiting On N/A
<input type="checkbox"/> KP	FLESHER, KRISTINA MARIE (A63S) HR Manager	Actions			
Employee Review Finalized	Employee Can See Both Reviews	Supervisor Fenwick, Derek	Supervisor Review Finalized	Supervisor Can See Both Reviews	Waiting On Finalized-View History

Under the **Supervisor Answers** section, enter your highlights from the QCI conversation. The employee will be able to view these comments as well.

Open Ended Questions (1)

Quarterly Check-In 0%

Quarterly Check-In Directions

A quarterly check-in consists of a 15-minute conversation between manager and employee, held each quarter for discussion and action planning around performance and development. Following each meeting, please document a summary of key highlights from the conversation here.

Some considerations for your highlights are:






What recent work-related accomplishment are you most proud of?

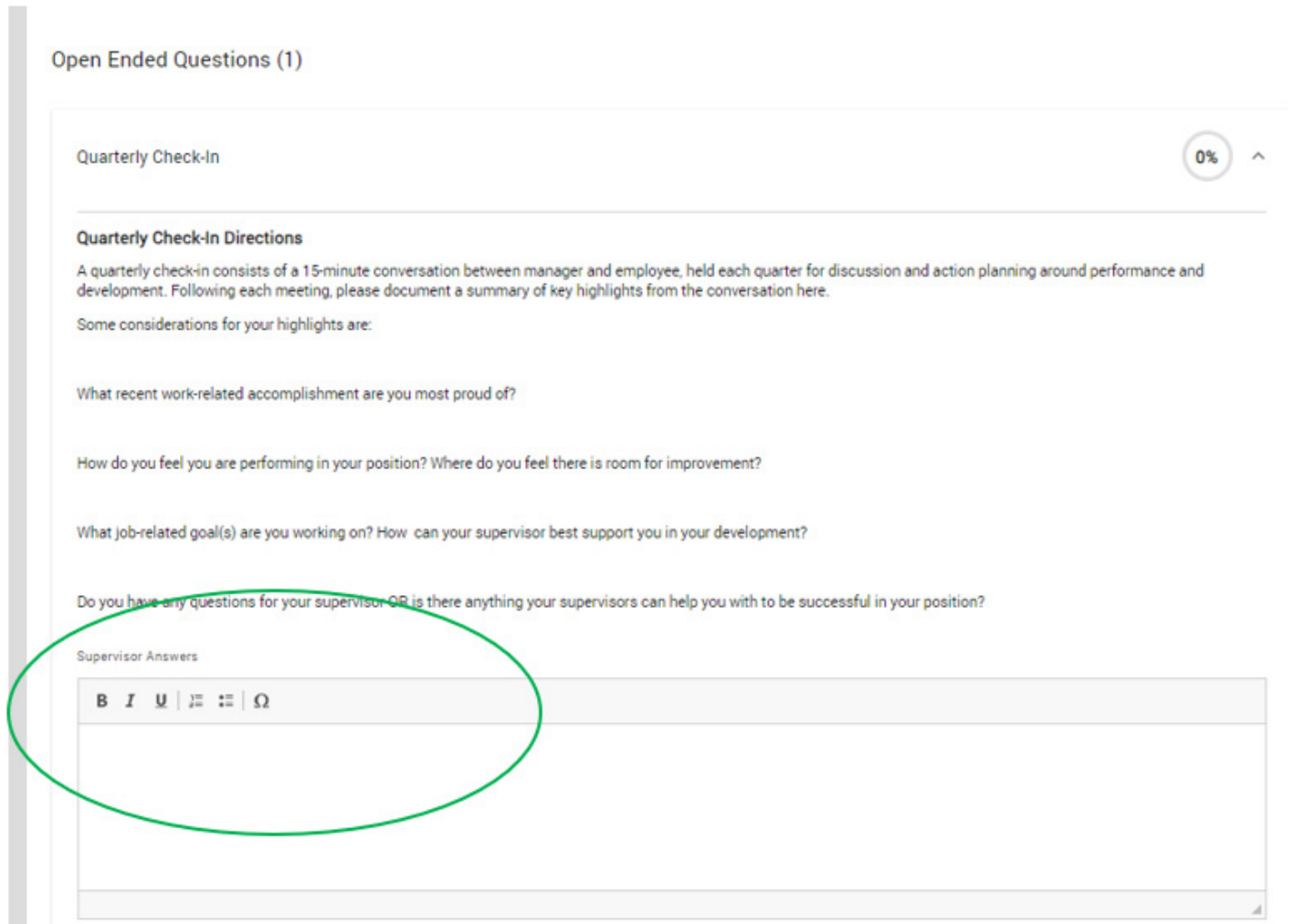
How do you feel you are performing in your position? Where do you feel there is room for improvement?

What job-related goal(s) are you working on? How can your supervisor best support you in your development?

Do you have any questions for your supervisor OR is there anything your supervisors can help you with to be successful in your position?

Supervisor Answers


B I U |     



You can upload QCI related files to the review, such as a completed QCI template form. You can upload documents that can be visible to the employee and documents that are not visible to the employee.


Supervisor Uploaded Documents

Documents Visible to Employee


[Upload a File](#)
Select Here to Upload

Max 5 files per upload (20.00 MB size limit per file)
[Allowed File Types](#)

Documents Hidden from Employee


[Upload a File](#)
Select Here to Upload

Max 5 files per upload (20.00 MB size limit per file)
[Allowed File Types](#)

Signature

Employee Signature
N/A

Supervisor Signature

[Add Signature](#)

[Send to Next Level](#)

[Cancel](#)

[Save](#)

[Finalize](#)

To save your comments click **Save**.


When comments are complete and the QCI is ready to be closed, you can click **Finalize**.

NOTE: Using the “Add Signature” button is optional. The important buttons to use are **Save** and **Finalize**.

NOTE: There does not need to be a comment from both the supervisor and employee to Finalize. You should discuss during the QCI who will be responsible for entering the QCI summary/highlights in **Paycom**.

At least one person should document QCI highlights each quarter. Best practice is for both the employee and supervisor to add their own comments and/or documents.

NOTE: Once **Finalize** is selected, the employee will not be able to add any more comments to the QCI. If you need to **Unfinalize**, you can click **Actions** and **Unfinalize Supervisors Review**. This will allow the employee to make comments.


FLESHER, KRISTINA MARIE (A63S)
 HR Manager

Employee Review
 Finalized

Employee Can See
 Both Reviews

Supervisor
 Fenwick, Derek

Supervisor Review
 Finalized

Supervisor Can See
 Both Reviews

Waiting On
 Finalized-View

Actions ▾

- Unfinalize Supervisor Review
- Unfinalize Employee Review
- Print Review

The graph will display who is **not started**, who is **in progress** and who is **finalized** on both the Supervisor and Employee side of the QCI. This will allow you to easily track where your team is at in progress.

Active Reviews (3)

