

QUARTERLY CHECK-IN



PAYCOM DOCUMENTATION EXAMPLES

Quarterly Check-In goal in **Paycom** should be updated each meeting with key highlights of the conversation.

EXAMPLE #1: "DOR met with Sam for first QCI of the year. Sam is proud of successfully being a CI for the first time, consistently exceeding productivity standards, and being accepted into the Clinical Academy. She is confident in her job performance and has been focusing on increasing use of group interventions and HIRT at the appropriate dosage during sessions. Sam would like to pursue the DORit program and increase the frequency of students she takes each year. DOR provided an application for the DORit program and updated Sam's student survey form. Sam requested training documents on Predict/Precision to help increase her use of the tool for case management of her patients. DOR emailed training documents following meeting. No job performance concerns noted by DOR."

EXAMPLE #2: "I met with my DOR for QCI #2 today. We reviewed my stable job performance. Discussed recent success with a complex patient and the in-service I completed for the facility on slide board transfers last month. My productivity has been slightly below thresholds, and it was recommended I setup iPad HotKeys for quicker completion of TENs during my sessions. I'm a little nervous but will try that. My goal is to take a lymphedema CEU by the end of the year."

EXAMPLE #3: "I met with my ARD today for my final QCI of the year. Reviewed feeling proud of: successful implementation of group/concurrent clinic wide, up-trending GPM following onboarding of new employees, and new communication form with nursing staff for therapy referral process. I feel that I am performing strongly in my position and financial metrics/patient outcomes are at or exceeding thresholds. I feel I can more closely manage oversight of overtime, CORE adherence, cost driver minute management, and evaluation lengths. I am planning to apply for the next round of Leadership Academy and requested any contact information of previous scholars that my ARD knows to discuss their experience."

EXAMPLE #4: "Peter and I met today for his Q3 QCI. Reviewed notes from Q2 meeting. Peter said he feels he has been bringing personal life stress to work which has been impacting his job performance and maybe is why he feels overwhelmed. DOR provided EAP benefit information for external support and scheduled a meeting for the following week to touch base."

HELPFUL TIPS

- For best results, update progress in **Paycom** during or right after the Quarterly Check-In meeting.
 - » This can be completed by either manager OR employee, whichever is easier
 - » Consider writing one sentence per QCI prompt to best capture the key highlights of the meeting
- Track your Teams QCI status in **Paycom** through the Performance Dashboard.