

Manager Check-Ins in Workday

This guide shows you how to document manager check-ins in Workday for coaching conversations, performance concerns, formal warnings, and performance improvement plans. Whether you are coaching an employee, addressing a concern, or initiating a PIP, this job aid walks you through how to capture, track, and follow up on each conversation step by step.

Who is this for: People Managers, Business Owners, HR

Time to complete: 10 to 15 minutes

Before You Start

- You have an active Workday account and are logged into Workday
- You have had or are planning a conversation with the employee about their performance
- For formal warnings or PIPs, consult your HRBP or HR team before initiating in Workday

Types of Check-Ins and When to Use Them

Type	When to Use
Coaching Check-In	Ongoing conversations to provide feedback, clarify expectations, or address early concerns
Formal Written Warning	A formal documented warning outlining expectations and consequences if issues continue
Performance Improvement Plan	A structured plan with specific goals, timelines, and measurable outcomes for an employee who is not meeting expectations after prior coaching

Note: Always consult your HRBP or HR team before issuing a formal written warning or initiating a PIP. They will guide you on the process, documentation requirements, and any legal considerations.

Documenting Coaching Check-Ins

STEP 1:

From the Workday Homepage, create a check-in:

1. Click on the **search bar** and type "**My Check-Ins**"
2. Select **My Check-Ins** from the dropdown results
3. Click **Create Check-In**

The screenshot displays the Ambient Workday interface. At the top, it says "On behalf of: Michael Scott". The header includes the Ambient logo and navigation icons. A banner image shows a group of people in hard hats with the text "People For Spaces that Matter" and "Rooted in our local teams, united by one collective." Below the banner, a greeting reads "Good Evening, On Behalf of: Michael Scott". A search bar is highlighted with a red box and a red circle labeled "1". The search results dropdown is also highlighted with a red box and a red circle labeled "2", showing options like "My Check-Ins Report", "Check-Ins Report", and "View Check-Ins Report". Below the search results, a section titled "Awaiting Your Action" shows a "Data Change: Ross Geller" notification. A red box labeled "3" highlights the "Create Check-In" button on the "My Check-Ins" page, which also features an "Archive Check-Ins" button.

Note: All individuals can create a Check-In with any member of the organization.

Documenting Coaching Check-Ins

STEP 2:

Document the conversation:

1. Select the **Participant**
2. In the **Planned For** date field, enter the date the conversation took place or is planned for
3. In the **Description** field, document the key details like the following:
 - What was discussed
 - Specific expectations communicated to the employee
 - Agreed next steps and actions
 - Follow-up date for the next check-in
4. Select or add a **Topic** that clearly describes the nature of the conversation
5. Click **Submit** to save the check-in

The screenshot shows the 'Create Check-In' form with the following elements and numbered callouts:

- 1**: Points to the **Participant** field, which contains 'Ross Geller'.
- 2**: Points to the **Planned for** date field, which shows 'MM / DD / YYYY'.
- 3**: Points to the **Description** text area, which includes a rich text editor toolbar.
- 4**: Points to the **Manage Topics** section, which has an 'Add' button.
- 5**: Points to the **Save** button at the bottom left.

Other visible elements include the **Attachments** section with a 'Drop files here' area and a 'Select files' button, and a 'Notify Participant' checkbox that is checked.

Note: Keep notes factual and professional. Document what was said, what was agreed, and what the expected outcomes are. Avoid personal opinions or subjective language.

Recording Formal Warnings

STEP 3:

Document a formal warning:

1. Follow the same steps as creating a check-in (Step 1 and Step 2 above)
2. Use a clear Topic name that indicates it is a warning
3. In the Description field, document:
 1. The specific performance or behavior issue with concrete examples
 2. Prior coaching or feedback given (reference previous check-in dates)
 3. Clear expectations for improvement and the timeframe
 4. Consequences if improvement is not demonstrated (e.g., further disciplinary action, PIP)
4. Attach any supporting documentation if applicable
5. The employee will receive a notification and can view the check-in. They can also add their own highlights or comments in response

The screenshot displays the 'Create Check-In' and 'Manage Topics' interface. The top section, 'Create Check-In', includes fields for Participant (Ross Geller), Notify Participant (checked), Planned for (MM / DD / YYYY), and Description (Normal, Formal Performance Follow-Up and Marketing Deliverables Review). A red box labeled '4' highlights the Attachments section with a 'Drop files here' area and a 'Select files' button. The bottom section, 'Manage Topics', shows a list of topics with 'Formal Performance Follow-Up and Marketing Deliverables Review' selected. A red box labeled '2' highlights the Topic Name field. Below it, a red box labeled '3' highlights the Notes field, which contains the text: 'Conducted a formal follow-up discussion with Ross to review progress against previously discussed expectations. Continued gaps were observed in meeting project timelines, providing timely updates to stakeholders, and maintaining consistency in marketing execution. Ross was reminded that sustained improvement is required to meet the expectations of the role.' A red box labeled '4' highlights the Attachments section at the bottom of the 'Manage Topics' section, also featuring a 'Drop files here' area and a 'Select files' button.

Recording Formal Warnings

STEP 4:

Schedule a follow-up date and create a new check-in to review progress at the agreed time. Follow the same steps as **Document a formal warning**

Create Check-In

Participant

✕ Ross Geller

Notify Participant

☒

Planned for

08 / 19 / 2026

Description

Normal
Final Performance Warning and PIP Recommendation Discussion

Attachments

Drop files here
or
Select files

Manage Topics

⊕ Add

Final Performance Warning and PIP Recommendation Discussion

Select Existing Topic

OR

Topic Name

Final Performance Warning and PIP Recon

Notes

Shared Notes

Normal
Reviewed ongoing performance concerns with Ross, including limited improvement since prior check-ins and continued challenges with timely delivery, stakeholder communication, and ownership of marketing priorities. Ross was advised that immediate and sustained improvement is required, and that a formal Performance Improvement Plan will be initiated to clearly define expectations, support, timelines, and success measures.

> Shared Notes History

My Notes

Normal

Attachments

Drop files here
or
Select files

Important: Your HRBP or HR team should be consulted before issuing any formal warning. They can advise on documentation standards, policy alignment, and next steps.

Initiating a Performance Improvement Plan (PIP)

A PIP is a formal plan used when prior coaching and warnings have not led to improvement. It sets specific goals, a timeline, and measurable outcomes for the employee.

STEP 5:

Start a PIP in Workday:

1. Click on the **search bar** and type "**Start Performance Improvement Plan for Employee**"
2. Select "**Start Performance Improvement Plan for Employee**" from the dropdown results
3. Select the **employee**, choose the **Review Template**, and enter the **start and end dates**
4. Click **Submit** to initiate the process

The screenshot displays the Workday interface for Michael Scott. A search bar at the top of the main content area is highlighted with a red box and a red circle with the number 1. Below the search bar, a dropdown menu is open, showing two search results: "Start Performance Improvement Plan for Employee Task" and "Start Development Plan for Employee Task". The first result is highlighted with a red box and a red circle with the number 2. Below the dropdown, a modal window titled "Start Performance Improvement Plan for Employee" is open. This modal contains four fields: "Employee" (with a dropdown menu showing "Ross Geller"), "Review Template" (with a dropdown menu showing "Performance Improvement Plan"), "Period Start Date" (with a date picker), and "Period End Date" (with a date picker). These four fields are grouped together and highlighted with a red box and a red circle with the number 3. At the bottom of the modal, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red box and a red circle with the number 4.

Initiating a Performance Improvement Plan (PIP)

STEP 6:

Complete the PIP details:

1. You will receive a task in **My Tasks** titled "**Complete Manager Evaluation**"
2. Click on the **Get Started** button

The screenshot displays the Ambient system interface. On the left, a sidebar titled "All Items" shows a list of tasks. The first task, "Manager Evaluation: Performance Improvement Plan: Ross Geller", is highlighted with a red box and a red circle with the number 1. Below it are other tasks like "Data Change: Ross Geller" and "Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026".

The main content area shows the details of the selected task, "Complete Manager Evaluation". It includes a header with "Manager Evaluation: Performance Improvement Plan: Ross Geller" and a "Review Period" of "08/18/2026 - 08/18/2026". The text describes the purpose of the PIP and provides instructions on how to complete it. At the bottom, a blue "Get Started" button is highlighted with a red box and a red circle with the number 2.

All Items 14 items

Search: All Items

Advanced Search

Manager Evaluation: Performance Improvement Plan: Ross Geller 08/17/2026 ☆

Effective: 08/18/2026

Data Change: Ross Geller 08/11/2026 ☆

Due: 08/18/2026

Effective: 08/23/2026

Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026 07/29/2026 ☆

Effective: 06/30/2026

Change Contact Information: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael 07/29/2026 ☆

Created: 08/17/2026 | Effective: 08/18/2026

Complete Manager Evaluation

Manager Evaluation: Performance Improvement Plan: Ross Geller

Review Period 08/18/2026 - 08/18/2026

Use this Performance Improvement Plan to clearly document performance concerns, expectations for improvement, and how progress will be measured. This is a structured, time-bound process intended to support improvement through clarity, feedback, and follow-up. Managers are expected to review progress with the employee throughout the improvement period.

As you complete this Performance Improvement Plan:

- Be specific, factual, and job-related
- Focus on observable behaviors and outcomes, not assumptions or intent
- Use this document to guide ongoing check-ins and review progress over time

This Performance Improvement Plan supports a meaningful improvement conversation, clear expectations and ongoing follow-up.

Get Started

Initiating a Performance Improvement Plan (PIP)

STEP 7:

Complete the PIP details:

Go to **Guided Editor** and complete each section:

- 1. **Performance Commentary:** Summary of where the employee is not meeting expectations
- 2. **Specific Concerns:** 2 to 3 areas with recent examples and prior coaching referenced

Complete Manager Evaluation

Manager Evaluation:
Performance Improvement Plan: Ross Geller

Actions

08/18/2026 - 08/18/2026

Performance Summary

Development Items (Optional)

Supporting Documents (Optional)

Review and Submit

Performance Summary

Use this section to summarize the primary performance issue(s) being addressed and the expectations going forward. This summary should clearly explain what performance does not meet expectations and how performance must change or be sustained, without repeating detailed examples or action steps captured elsewhere in this plan.

Question

Summary of Performance Issues

Summarize the key performance issues(s), provide specific examples and their impact on the employee's role, team or business outcomes.

Focus on the **most critical concerns** and avoid listing every issue. Use clear, factual language to describe what is not meeting expectations, why it matters and the impact. This summary should explain what does not meet expectations and why it matters.

This summary should be specific enough that a reader unfamiliar with the situation can understand the issue.

Manager

Comment *

Normal

B I U A

Summary of Performance Issues

Ross has not consistently met expectations for the Marketing Manager role. The primary concerns are missed project timelines, inconsistent and delayed communication with stakeholders, limited ownership and follow-through on marketing priorities, and inconsistency in the execution of marketing deliverables. Despite prior feedback and follow-up discussions, sustained improvement has not been demonstrated. These gaps have affected the timely delivery of marketing initiatives, created challenges in stakeholder coordination, and reduced confidence in the consistent execution of key marketing priorities.

Back

Next

Save

Close

Initiating a Performance Improvement Plan (PIP)

STEP 8:

Complete the PIP details:

In the **Guided Editor** and complete each section:

1. **Duration & Development Goals** : Timeframe and specific actions the employee must take(shown in the screenshot attached)
2. **Supporting Documents**: Upload any relevant documentation

Complete Manager Evaluation

←

Manager Evaluation:
Performance Improvement
Plan: Ross Geller

Actions

08/18/2026 - 08/18/2026



○ Performance Summary

● Development Items (Optional)

2

○ Supporting Documents (Optional)

2

○ Review and Submit

Development Items (Optional)

Use this section to break the performance issue(s) into clear, individual items that can be tracked over time. Each item should focus on a specific area, the expected outcome, and the timeframe for improvement.

For each development item:

- Describe the issue using clear, factual, job-related language
- Describe what success looks like
- Include start date and a reasonable timeframe for improvement (i.e. 2 weeks, 30 days, etc.).
- End dates should indicate when improvement is expected to be demonstrated-
- Focus on **clarity** and **follow-through**. Avoid combining multiple issues into one item or repeating detailed examples already captured elsewhere in the plan.

Add

Manager Summary

Comment

Normal

▼

B

I

U

A

▼

:

=

🔗

✉

1

Ross is expected to take clear ownership of assigned marketing initiatives, complete deliverables within agreed timelines, and consistently follow through on commitments. Any risk to a deadline or expected outcome must be communicated to his manager and relevant stakeholders in advance.

Back

Next

 Save

Close

Initiating a Performance Improvement Plan (PIP)

STEP 9:

Review the **Performance Summary** and click **Submit**.

What happens next: Once you submit, the PIP is routed to the HR Partner for review and approval.

Complete Manager Evaluation

←

Manager Evaluation:
Performance Improvement
Plan: Ross Geller

Actions

08/18/2026 - 08/18/2026

Performance Summary

Development Items
(Optional)

Supporting Documents
(Optional)

Review and Submit

Performance Summary

Question **Summary of Performance Issues**
Summarize the key performance issues(s), provide specific examples and their impact on the employee's role, team or business outcomes.

Focus on the **most critical concerns** and avoid listing every issue. Use clear, factual language to describe what is not meeting expectations, why it matters and the impact. This summary should explain what does not meet expectations and why it matters.

This summary should be specific enough that a reader unfamiliar with the situation can understand the issue.

Manager

Comment
Ross has not consistently met expectations for the Marketing Manager role. The primary concerns are missed project timelines, inconsistent and delayed communication with stakeholders, limited ownership and follow-through on marketing priorities, and inconsistency in the execution of marketing deliverables. Despite prior feedback and follow-up discussions, sustained improvement has not been demonstrated. These gaps have affected the timely delivery of marketing initiatives, created challenges in stakeholder coordination, and reduced confidence in the consistent execution of key marketing priorities.

Question **Expectations Going Forward**
Summarize the performance expectations moving forward. Clearly describe what acceptable and sustained performance looks like at a high level, including what must change or be sustained to meet role expectations. Expectations should be clear, job-related, and understood by the employee.

Manager

Comment
Ross is expected to demonstrate immediate and sustained improvement in the timely delivery of marketing initiatives, ownership of assigned initiatives, and communication with stakeholders. He should consistently meet agreed deadlines, proactively communicate status changes, follow...

Submit

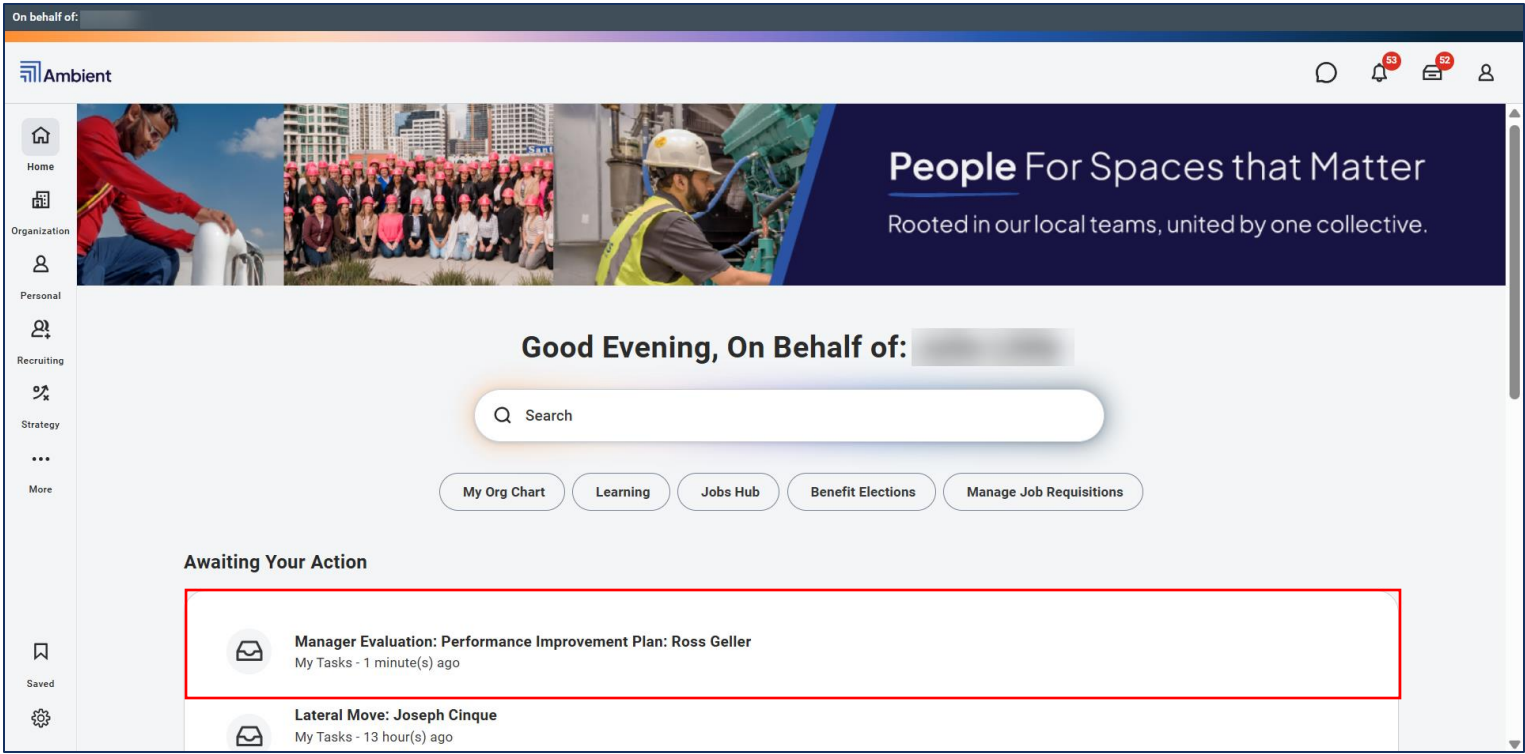
Save for Later

Note: The **Development Goals** you enter here **become Development Items on the employee's record**- that's how you'll track progress.

Performance Improvement Plan (PIP)

STEP 10:

After you submit, the PIP automatically **routes to the HR Partner** for review.



Note: This HR Partner approval step is built into the PIP process. It ensures the plan meets documentation and policy standards before it reaches the employee.

Performance Improvement Plan (PIP)

STEP 11:

The HR Partner can **Approve** the plan, **Send Back** for edits, or **Deny** it. You don't need to take any action at this step. If it's sent back, **the task returns to your My Tasks** with the HR Partner's feedback; if approved, the next task appears automatically.

Review Complete

Manager Evaluation

Manager Evaluation:
Performance Improvement Plan: Ross Geller

Actions

08/18/2026 - 08/18/2026

Performance Summary

Development Items (Optional)

Supporting Documents (Optional)

Review and Submit

Performance Summary

Question

Summary of Performance Issues

Summarize the key performance issues(s), provide specific examples and their impact on the employee's role, team or business outcomes.

Focus on the **most critical concerns** and avoid listing every issue. Use clear, factual language to describe what is not meeting expectations, why it matters and the impact. This summary should explain what does not meet expectations and why it matters.

This summary should be specific enough that a reader unfamiliar with the situation can understand the issue.

Manager

Comment

Ross has not consistently met expectations for the Marketing Manager role. The primary concerns are missed project timelines, inconsistent and delayed communication with stakeholders, limited ownership and follow-through on marketing priorities, and inconsistency in the execution of marketing deliverables. Despite prior feedback and follow-up discussions, sustained improvement has not been demonstrated. These gaps have affected the timely delivery of marketing initiatives, created challenges in stakeholder coordination, and reduced confidence in the consistent execution of key marketing priorities.

Question

Expectations Going Forward

Summarize the performance expectations moving forward. Clearly describe what acceptable and sustained performance looks like at a high level, including what must change or be sustained to meet role expectations. Expectations should be clear, job-related, and understood by the employee.

Manager

Approve

Send Back

Deny

Save for Later

Note: This HR Partner approval step is built into the PIP process. It ensures the plan meets documentation and policy standards before it reaches the employee.

Ambient

© 2026 Ambient Enterprises

Performance Improvement Plan (PIP)

STEP 12:

1:1 Conversation with employee. Once the HR Partner approves, Workday generates the formal PIP document and sends you a To Do: **"Have 1:1 conversation with employee"** in your **My Tasks**

The screenshot displays the Ambient Workday user interface. At the top, it says "On behalf of: Michael Scott". The left sidebar contains navigation icons for Home, Organization, Personal, Recruiting, Team, and More. The main header features the Ambient logo and a banner with the text "People For Spaces that Matter" and "Rooted in our local teams, united by one collective." Below the header, there's a section titled "Let's Focus on You" with a search bar and several action buttons: "My Org Chart", "Learning", "Jobs Hub", "Benefit Elections", and "Manage Job Requisitions". The "Awaiting Your Action" section is highlighted with a red border and contains a task titled "Have 1:1 conversation with employee: Manager Evaluation: Performance Improvement Plan: Ross Geller" with a subtext "My Tasks - 1 minute(s) ago". To the right, there's an "Announcements" section with a "Welcome!" message.

Important: The PIP becomes visible to the employee only after you submit this To Do step. Hold the conversation before submitting.

Performance Improvement Plan (PIP)

STEP 13:

- 1. The generated Employee Review (PDF), the formal PIP is attached to this task
- 2. **Meet with the employee first**, then click **Submit** on the To Do

All Items14 items

Search: All Items

Advanced Search

Have 1:1 conversation with employee: Manager Evaluation: Performance Improvement Plan: Ross Geller08/17/2026

Effective: 08/18/2026

Data Change: Ross Geller08/11/2026

Due: 08/18/2026

Effective: 08/23/2026

Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/202607/29/2026

Effective: 06/30/2026

Change Contact Information: Benefit Change - Home Address07/29/2026

Complete To DoHave 1:1 conversation with employee

ForRoss Geller

Overall ProcessPerformance Improvement Plan: Ross Geller

Overall StatusIn Progress

InstructionsPlease contact the worker and have the discussion with them prior to Submitting this To Do step. The details contained in the Performance Review will be visible for the worker to see once the To Do step has been submitted.

1 item

File Name	Type	File	Created by	Date and Time Created
Employee Review Printout - Geller, Ross Performance Improvement Plan 08_17_2026.pdf	Business Form (PDF)		Michael Scott	08/17/2026 05:45 PM

Submit

Save for Later

Close

Important: The PIP becomes visible to the employee only after you submit this To Do step. Hold the conversation before submitting.

Ambient

© 2026 Ambient Enterprises

Tracking a PIP

A PIP is a fixed form; there's no separate status or close-out workflow to complete. Instead, you track progress through the employee's Development Items, which work like goals.

STEP 14:

Find the PIP's Details

1. Go to the employee's profile → **Performance tab** → **Performance Improvement Plans/Development Items/Check-Ins/Performance Reviews**
2. The **details you entered in the PIP appear here**, each with a **Status**, **Start Date**, **Completion Date**, and **Status Note**
3. You can check and update the **Development Item** by clicking the **Edit** icon and update the Status (e.g., In Progress) and Status Note as the employee works through it. Use Add to create additional development items if needed
4. To give the employee more time, update the Completion Date on the Development Item directly, you do not need to reopen or change the PIP itself

The screenshot shows the profile of Ross Geller, Marketing Manager. The left sidebar contains navigation links: Actions, Team, Summary, Job, Compensation, Benefits, Contact, Personal, Performance (highlighted with a red box and a red circle with the number 1), and Career. The main content area has a top navigation bar with tabs: Goals, Check-Ins, Development Items, Performance Reviews, and Performance Improvement Plans (highlighted with a red box and a red circle with the number 1). Below the tabs, there is a table of Development Items. The table has a header row with columns: Review, Review Period Start Date, Review Period End Date, and View Review. The first row of data shows a completed item for Ross Geller with a start date of 08/18/2026 and an end date of 08/18/2026. A red box and a red circle with the number 2 highlight the table area.

Review	Review Period Start Date	Review Period End Date	View Review
Performance Improvement Plan: Ross Geller	08/18/2026	08/18/2026	<button>View</button>

Note: PIPs and the Annual Performance Review **share development items**. Any items still open during the annual review will appear on the review form automatically and vice versa.

Employee Acknowledgement & Completion

STEP 15:

After the 1:1, the employee receives "Provide Employee Review Comments" in their My Tasks. Click the **Get Started** button to open the task.

All Items15 items

Search: All Items

⌵

⚙️ Advanced Search

Manager Evaluation: Performance Improvement Plan: Ross Geller08/17/2026☆
Effective: 08/18/2026

Benefit Change - Home Address Change : Ross Geller on 07/21/202608/17/2026☆
Effective: 07/21/2026

Benefit Change - Marriage / Domestic Partnership : Ross Geller on 08/15/202608/17/2026☆
Effective: 08/15/2026

Benefit Change - Job Change : Ross Geller on 08/23/202608/11/2026☆
Due: 08/13/2026
Effective: 08/23/2026

☆ ⚙️ ⌵ Created: 08/17/2026 | Effective: 08/18/2026

Provide Employee Review Comments

Manager Evaluation: Performance Improvement Plan: Ross Geller ⋮

📄 PDF

Review Period08/18/2026 - 08/18/2026

Please acknowledge that you have received this Performance Improvement Plan. This acknowledgement serves as your digital signature. You may provide comments if you wish, however comments are not required.

In signing this PIP, the employee does not indicate agreement, but acknowledges that this performance discussion has occurred and that the expectations and improvement plan outlined above have been reviewed with them. They understand that improvement is expected and that if these expectations are not met, further action may be taken, up to and including termination of employment.

Get Started

The PIP is now Complete: Once acknowledged, the PIP's Overall Status becomes Successfully Completed, and the finished PIP is stored on the employee's Performance tab.

Employee Acknowledgement & Completion

STEP 16:

- Employee acknowledges the PIP
1. They review the **Summary**, then complete the Acknowledgement by selecting "**I Acknowledge**" (a digital signature). Comments are optional
 2. Acknowledgement confirms the employee received the PIP. Post Submission you can select the task from the Achieve section and view the entire Process Flow

Acknowledgement

Employee

Status *

×

I Acknowledge (By completing this acknowledgement, you confirm that you have received a copy of this Performance Improvement Plan. This acknowledgement does not necessarily indicate agreement with the review or feedback provided.)

⋮

Comment

Normal

▼

B

I

U

A

▼

:

=

🔗

✉

🔍

References

Key Things to Know

- Always consult your HRBP or HR team before issuing formal warnings or initiating a PIP. They will guide you on documentation, policy, and legal requirements.
- Document factual, specific information only. Reference dates, examples, and prior conversations. Avoid subjective language or personal opinions.
- Check-in records, warnings, and PIPs are all stored in Workday and can be referenced during performance reviews, talent discussions, and any future HR or legal proceedings.
- The employee can view their check-ins, PIPs, and development items in Workday. Be mindful of what you write and ensure it's accurate and professional.
- Performance concerns typically follow a progression: coaching check-ins, then a written warning, then a PIP. Skip steps only in consultation with HR for serious situations.
- Track PIP progress through Development Items, and schedule regular follow-ups. Consistent documentation demonstrates a good-faith effort to support the employee.
- If a PIP does not result in improvement, your HRBP and Legal will guide the next steps. Do not take termination or further disciplinary action without their involvement.

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.