

Completing Check-In Document



CloudVergent 360

Updated August 2025

Create a Check-In Document

- Check-In Documents allow the employee and line/talent manager to have a 1-on-1 documented, ongoing, digital conversation about performance
 - Questionnaires (*CV360 feedback process*) are completed to help the employee and manager frame the discussion
- Employees and line managers are responsible for coordinating with each other to schedule check-ins before the end of the performance cycle
- Check-In Documents may be used for probationary evaluations
- CV360 records the date of the check-in



The Check-In Document is used to record ongoing performance conversations.

The Check-In Document Process



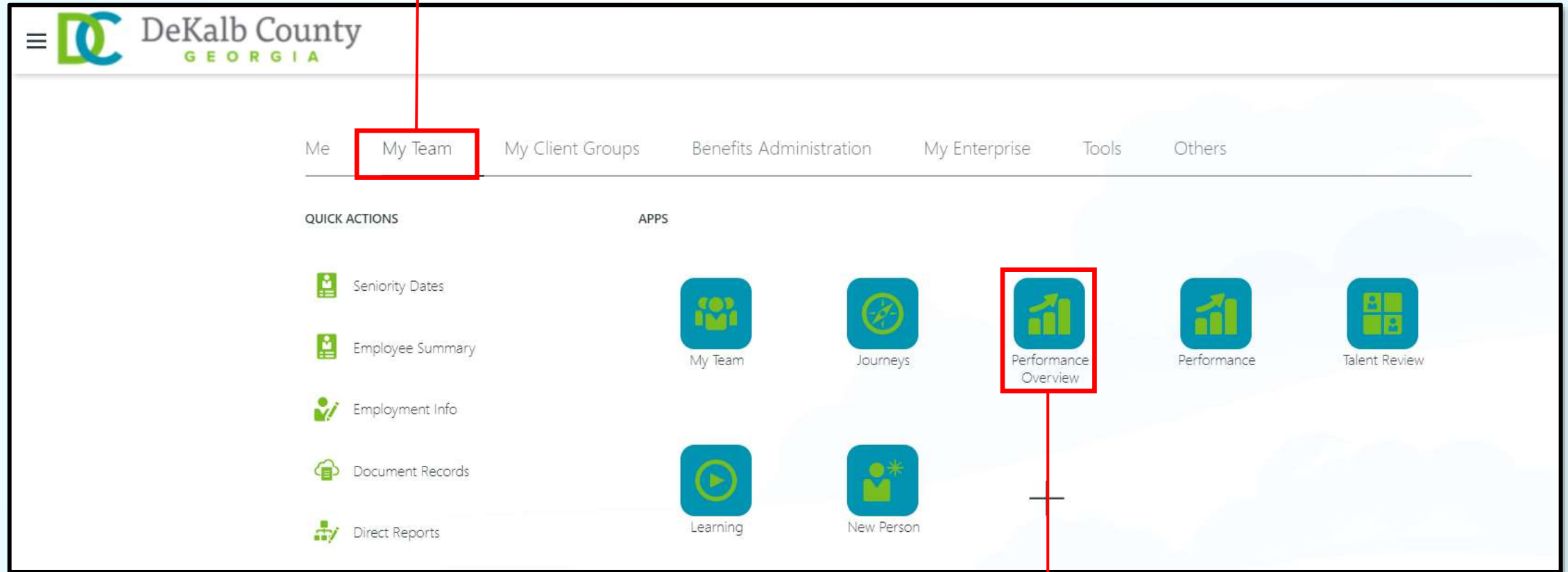
- Manager creates the *Check-In document* for the employee.
 - Employee completes *Employee Questionnaire* to provide their perspective.
 - Manager completes *Manager Questionnaire* to provide constructive feedback to employee.
- The *Check-In* may be updated/modified at any time during the performance year.

Note: Feedback fields are pre-determined and can not be amended. The General Discussion Topics section will allow managers to add topics relevant to the current performance periods.

Create a Check-In Document

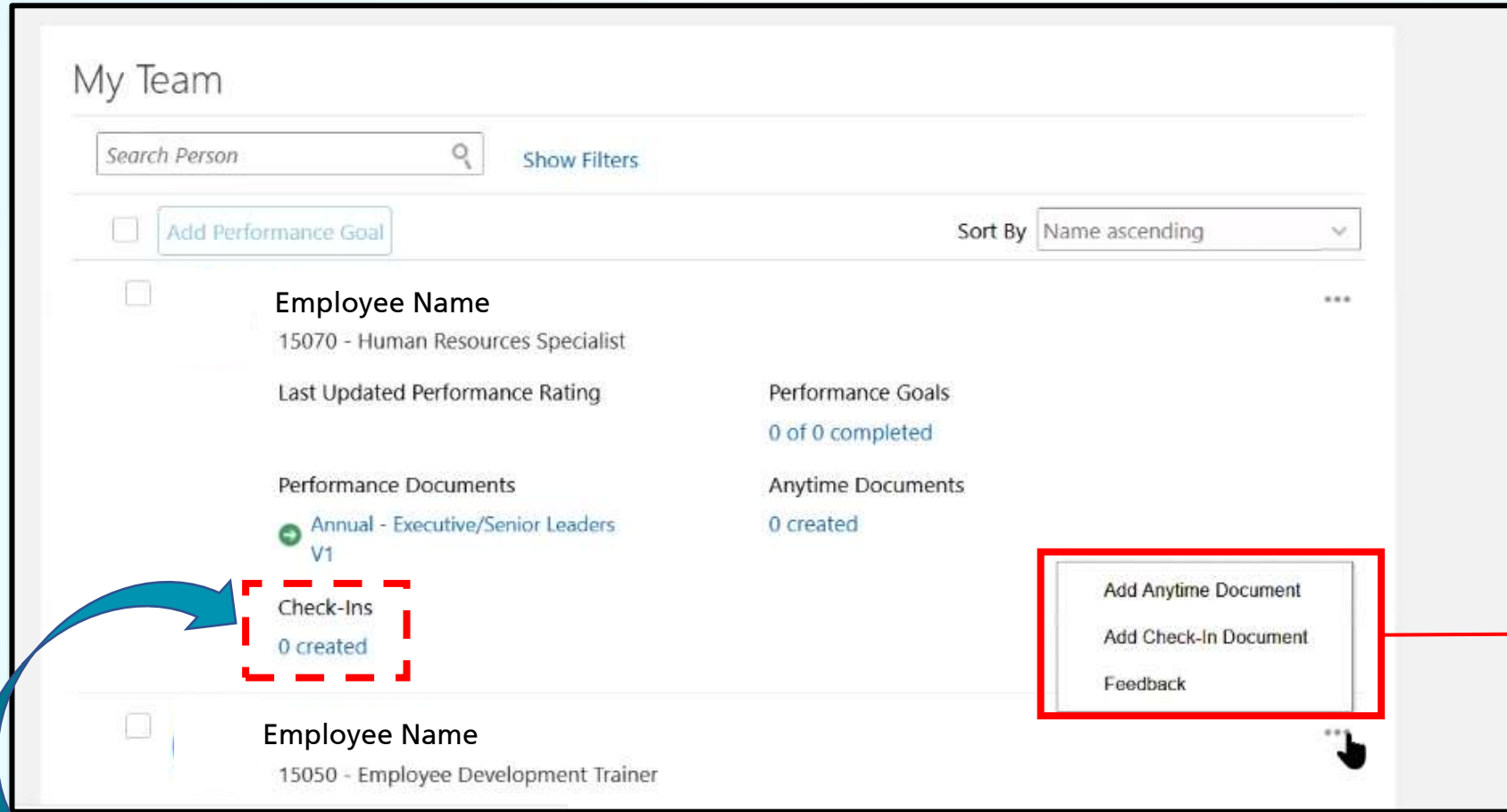
1

On the home page, navigate to My Team



2

Create a Check-In Document



My Team

Search Person Show Filters

☐ Add Performance Goal Sort By Name ascending

☐ Employee Name
15070 - Human Resources Specialist

Last Updated Performance Rating Performance Goals
0 of 0 completed

Performance Documents Anytime Documents
Annual - Executive/Senior Leaders V1 0 created

Check-Ins
0 created

☐ Employee Name
15050 - Employee Development Trainer

Add Anytime Document
Add Check-In Document
Feedback

Select the ellipsis and
**Add Check In
Document** option from
the drop-down list next
to the appropriate
employee name

3

To open an existing Check-In Document, select it from the Check-Ins section.

Troubleshooting



If an employee name does not appear

-or-

If a former employee's name is included in the current list

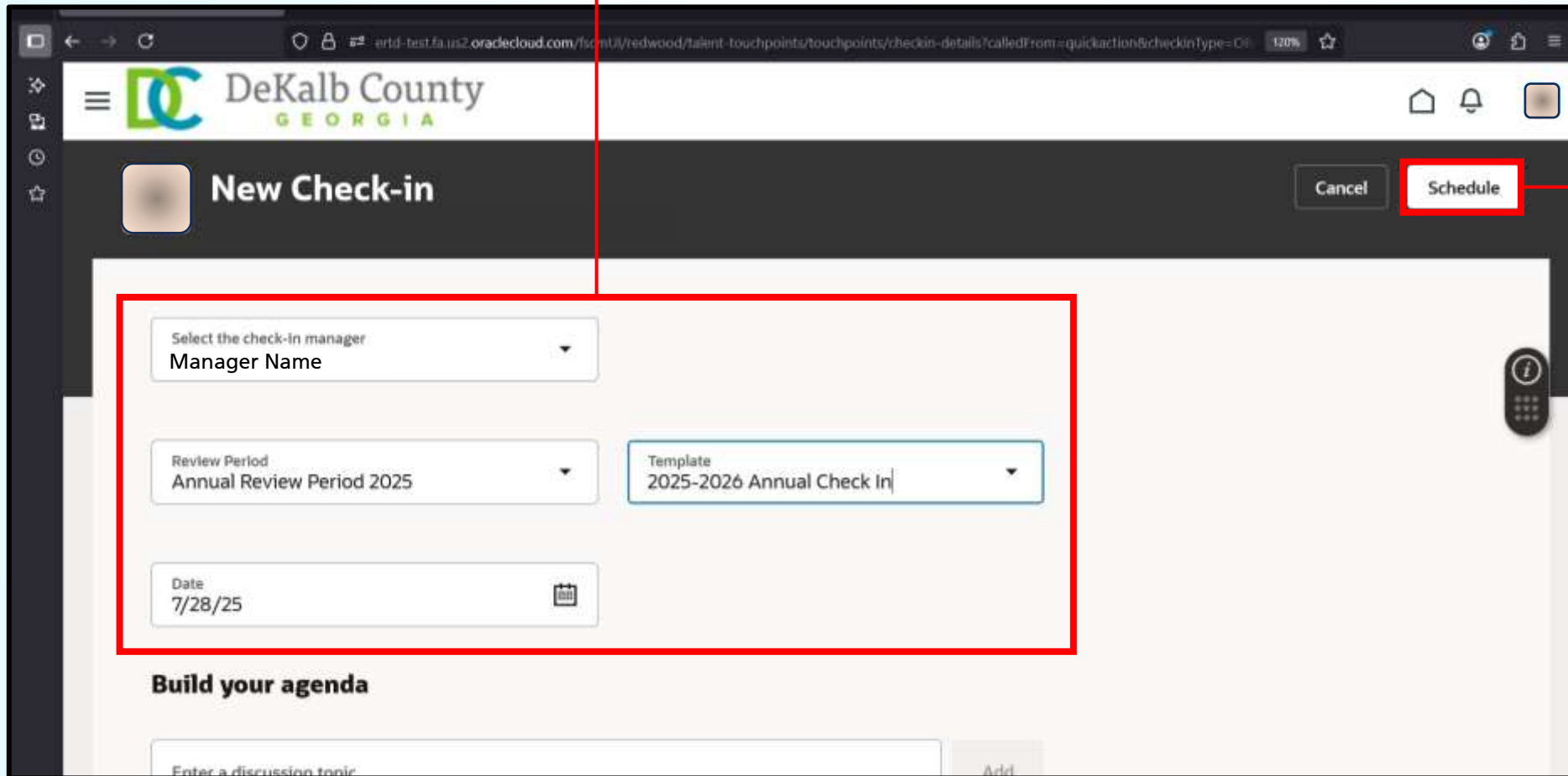
Contact your Department Admin/Payroll Coordinator for assistance to update hierarchy changes.

Create a Check-In Document

Complete the Manager,
Review Period, Template
and Date fields

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Note: Select the correct Review Period based on the following:
2023-2025 (4/1/2023-3/31/2025)
2025-2026 (4/1/2025-3/31/2026)



DeKalb County
GEORGIA

New Check-in

Cancel Schedule

Select the check-in manager
Manager Name

Review Period
Annual Review Period 2025

Template
2025-2026 Annual Check In

Date
7/28/25

Build your agenda

Enter a discussion topic

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Select Schedule

Create a Check-In Document

Upon creation of the Check-In Document, CV360 automatically generates two notifications to employee



Note: CV360 does not create a scheduled event, and the Agenda function is NOT enabled

Check-In Scheduled

Hello Employee

Your Manager [redacted] scheduled a check-in for you. Review the agenda and add discussion topics as required.

Thank you.

You and Your Manager

Check-in Date: 2023/03/31

[Go to Check-in](#)

Agenda

+ Add discussion topic

Check-In Document Created

Hello, Employee

Your Manager [redacted] created your PY 2024-25 Performance Document. [Review and add any comments.](#)

Thank you.

Review Period

Check-In Date

Check-In Template

[Go to Check-In document: PY 2023-24 Performance Document.](#)

CV360 Notifications

Notifications are only triggered upon *creation* of the Check-In document.

Current process does NOT trigger any CV360 notifications to the employee or the manager regarding *changes* to the Check-In document.

It is very important to have open communication about the process regarding expectations and timelines.



Complete a Check-In Document

Return to the Performance Overview page (see step1)



My Team

Show Filters

☐ [Add Performance Goal](#)

Sort By Name ascending

☐

Employee Name
15050 - Employee Development Trainer

Last Updated Performance Rating

Performance Documents

Check-Ins

1 created | Last on 3/31/25

Performance Goals

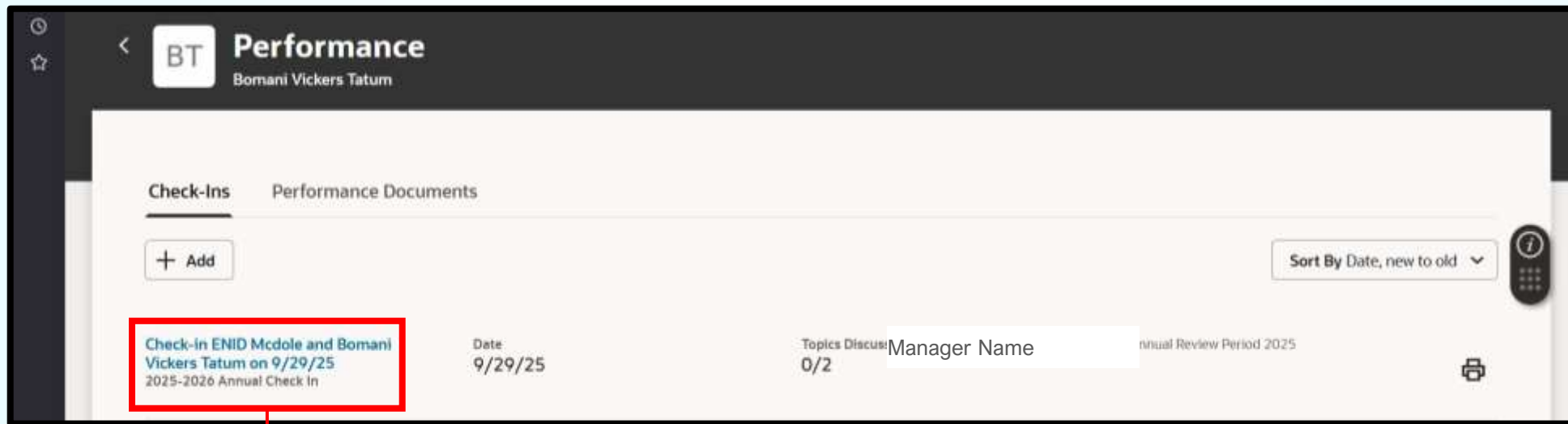
Anytime Documents

2 created



Open the list of available Check-In documents by selecting the **# created** link

Complete a Check-In Document



BT Performance
Bomani Vickers Tatum

Check-Ins Performance Documents

+ Add

Sort By Date, new to old

Check-in ENID Mcdole and Bomani Vickers Tatum on 9/29/25
2025-2026 Annual Check In

Date: 9/29/25

Topics Discussed: 0/2

Manager Name

Annual Review Period: 2025




Select the link for the desired
Check-In Document

Complete a Check-In Document



Select
View Questionnaire



Questionnaire for ENID Mcdole

No responses have been added.

[View Questionnaire](#)

Mark as done

☐

Complete a Check-In Document



Enter the appropriate comments in the Strengths, Opportunities, Accomplishments, Developmental Goals and Career Goals fields; then select Save

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Questionnaire for ENID Mcdole

Manager Questionnaire

Strengths – Review performance indicators where employee consistently exceeds expectations/demonstrate accountability

Opportunities – Indicate areas where employee may perform more successfully in assigned role

Accomplishments – Describe employee’s major performance contributions, accomplishments, and achievements during the performance cycle

Cancel

Save

Complete a Check-In Document

In the dropdown for Employee Questionnaire Response select either **Agree** or **Disagree**

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The screenshot shows a dropdown menu titled "Employee Questionnaire Response". The menu is open, displaying three options: "Approved", "I Agree", and "I Disagree". A red rectangular box highlights the dropdown menu and its options. A red line connects the number "10" in a blue circle to the dropdown menu.



If the employee completes the self-evaluation, select either **Agree** or **Disagree**. Comments can then be added in the Comments field.

Use the **Approved** option only when the employee does not complete the self-evaluation. Add a comment in the **Other Comments** field.

Complete a Check-In Document



If the employee does not complete the employee questionnaire (self-evaluation), **manager must** enter one of the following comments in the **Other Comments** field to close out the performance review :

- Employee was not required to complete the self-evaluation based on job classification.
- Employee opted not to complete the self-evaluation.
- Employee did not complete the self-evaluation by due date.
- Employee has been employed less than 90 days prior to the end of the performance cycle.
- Employee has not been supervised by the current supervisor a minimum of 90 days.

Other Comments

Complete a Check-In Document



Questionnaire for ENID Mcdole
Responses have been added.

[View Questionnaire](#)

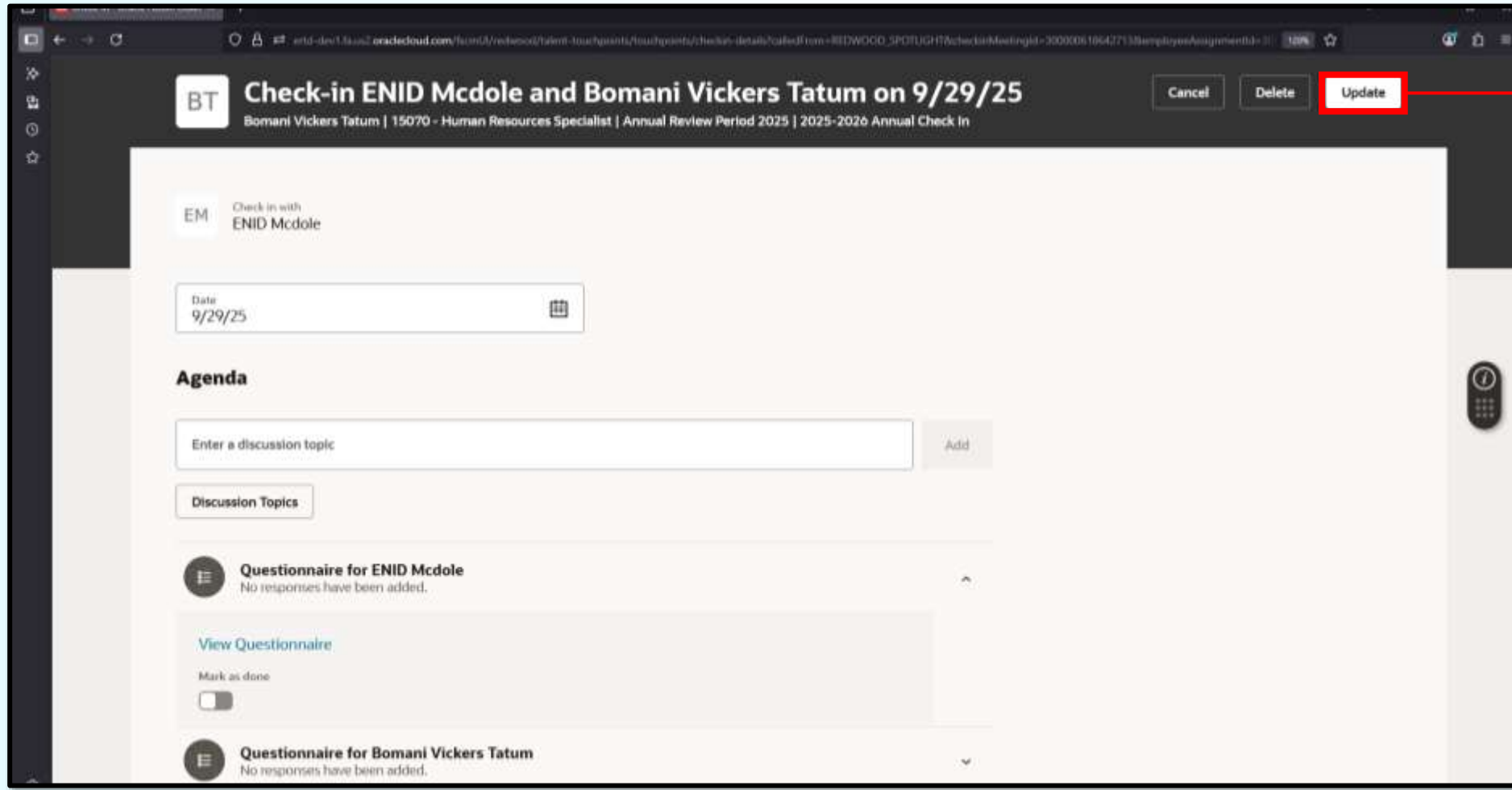
Mark as done

☒

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To close the Check-In Document, select the Mark as done slider

Complete a Check-In Document



BT Check-in ENID Mcdole and Bomani Vickers Tatum on 9/29/25
Bomani Vickers Tatum | 15070 - Human Resources Specialist | Annual Review Period 2025 | 2025-2026 Annual Check In

Cancel Delete **Update**

EM Check in with ENID Mcdole

Date 9/29/25

Agenda

Enter a discussion topic Add

Discussion Topics

Questionnaire for ENID Mcdole
No responses have been added.

[View Questionnaire](#)

Mark as done

Questionnaire for Bomani Vickers Tatum
No responses have been added.

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Select the
Update button

IMPORTANT!



- Check-In Documents are not to be deleted!
- Only Talent Administrators can remove a Check-In document. To request the removal of a document send an email to HRTalent@dekalbcountyga.gov.
- Employees and managers ***must use*** the Edit button!
- **NEVER** use the Delete button!