

# Create an Ad Hoc Check-In

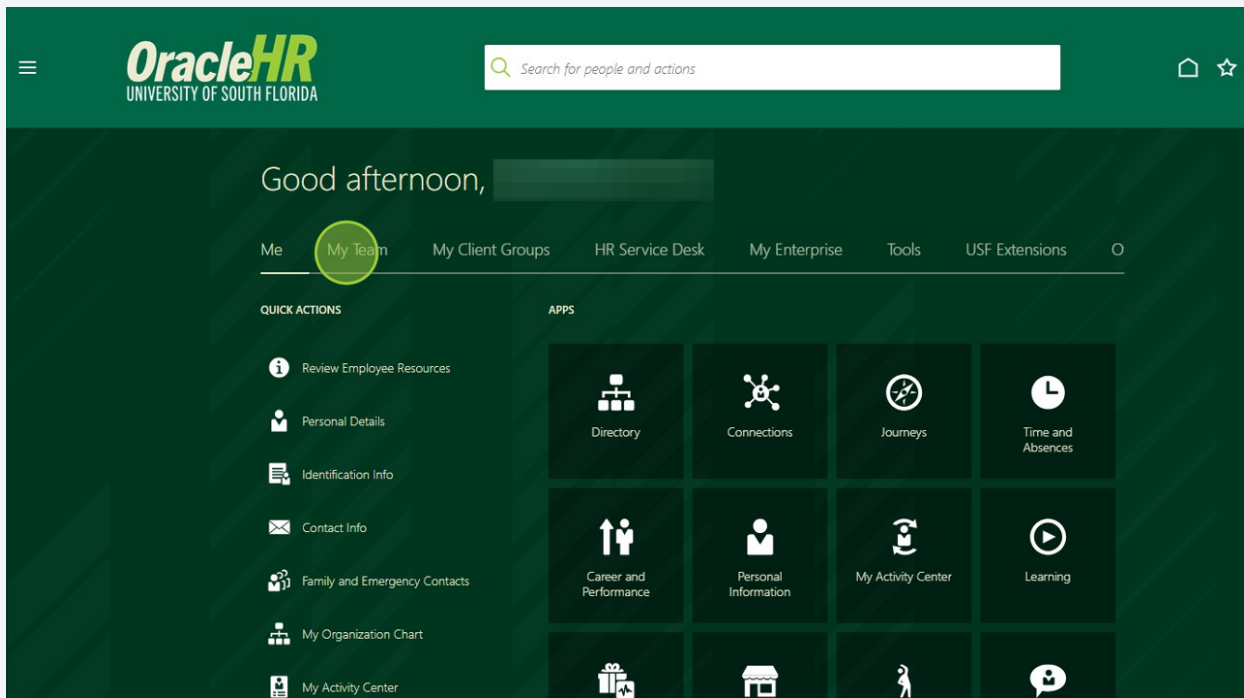


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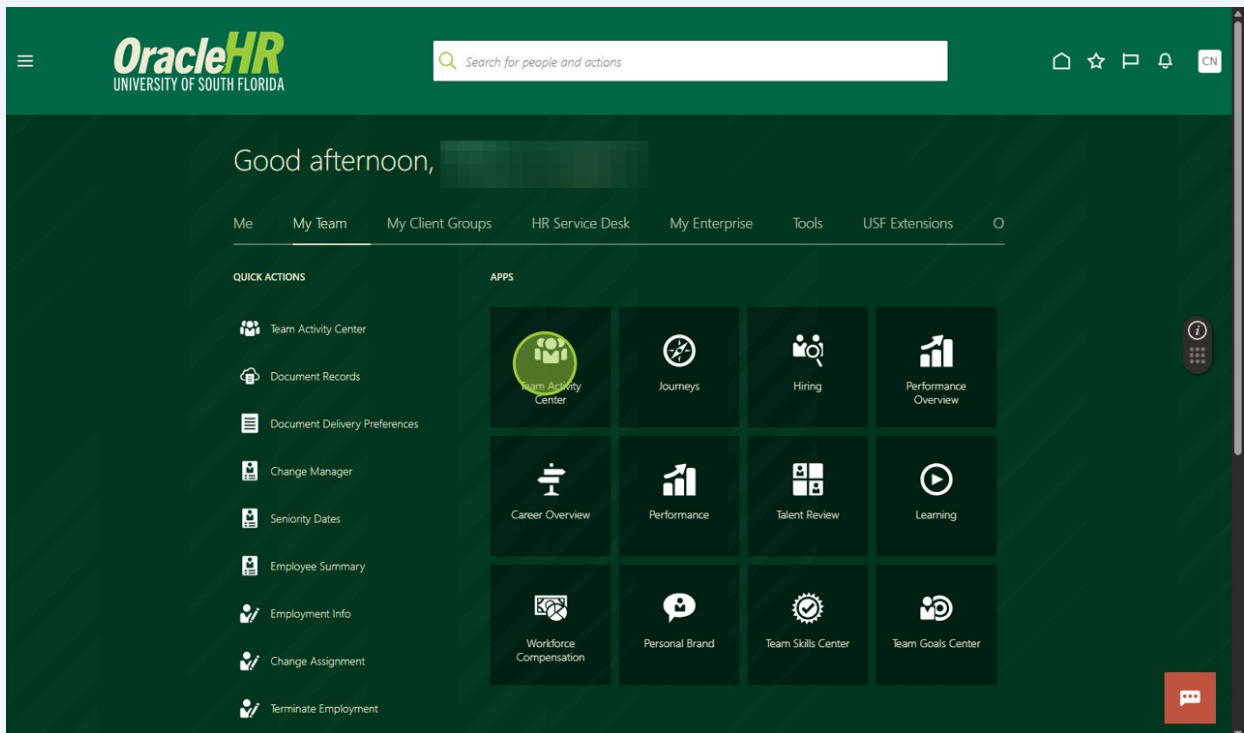
Quarterly check-ins are an important part of the performance management process. In this session, we'll provide a high-level overview of how to create an Ad Hoc check-in for your employees. First, you will need to navigate to Oracle HR to sign in.

The Oracle HR logo, consisting of the word 'Oracle' in white and 'HR' in green, both in a bold, italicized sans-serif font, set against a dark green background.

2 Select "My Team".



3 Select "Team Activity Center".



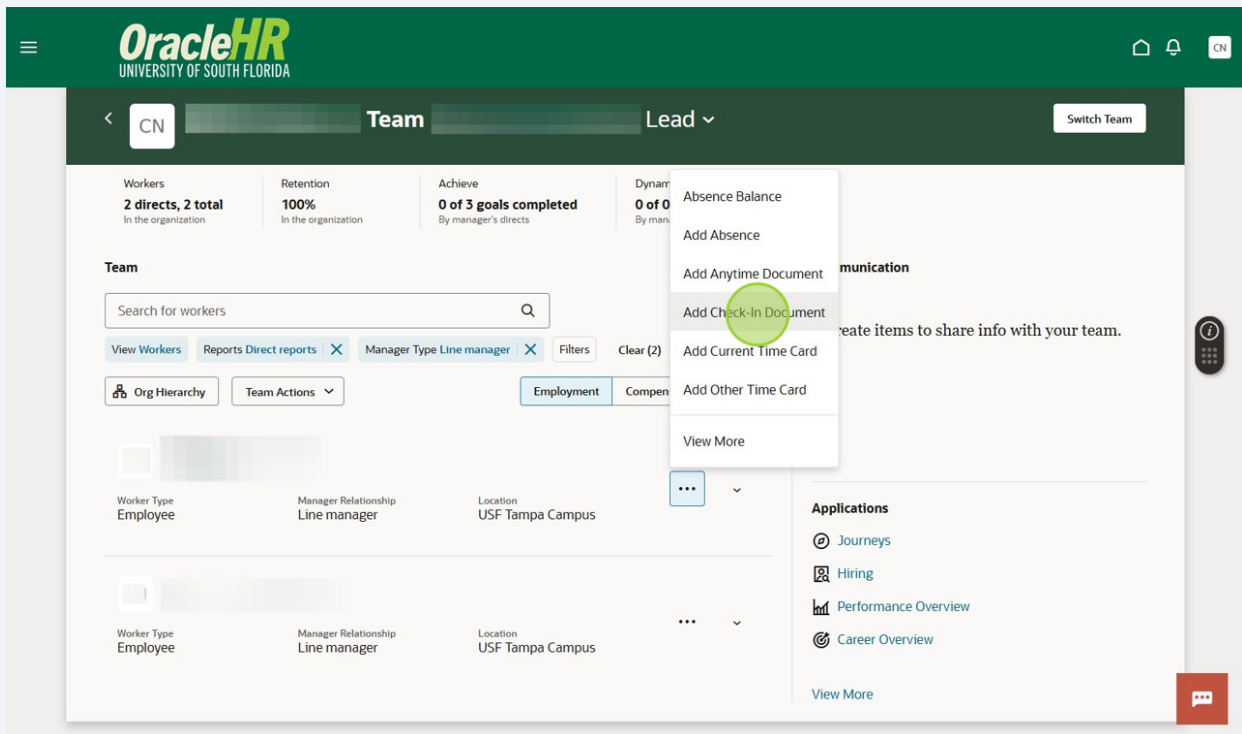
4 Navigate to the employee for whom you would like to create a check-in.

The screenshot shows the Oracle HR interface for the University of South Florida. At the top, there's a green header with the Oracle HR logo and navigation icons. Below the header, a dark green bar contains a breadcrumb trail: < CN > Team > Lead. A 'Switch Team' button is on the right. The main content area is divided into four summary cards: 'Workers' (2 directs, 2 total), 'Retention' (100%), 'Achieve' (0 of 3 goals completed), and 'Dynamic skills' (0 of 0 core skills achieved). Below these is a 'Team' section with a search bar and filters. A table lists team members with columns for Worker Type, Manager Relationship, and Location. The first worker is highlighted with a green circle. To the right is a 'Communication' section with a 'Create items to share info with your team.' prompt and an 'Applications' list including Journeys, Hiring, Performance Overview, and Career Overview.

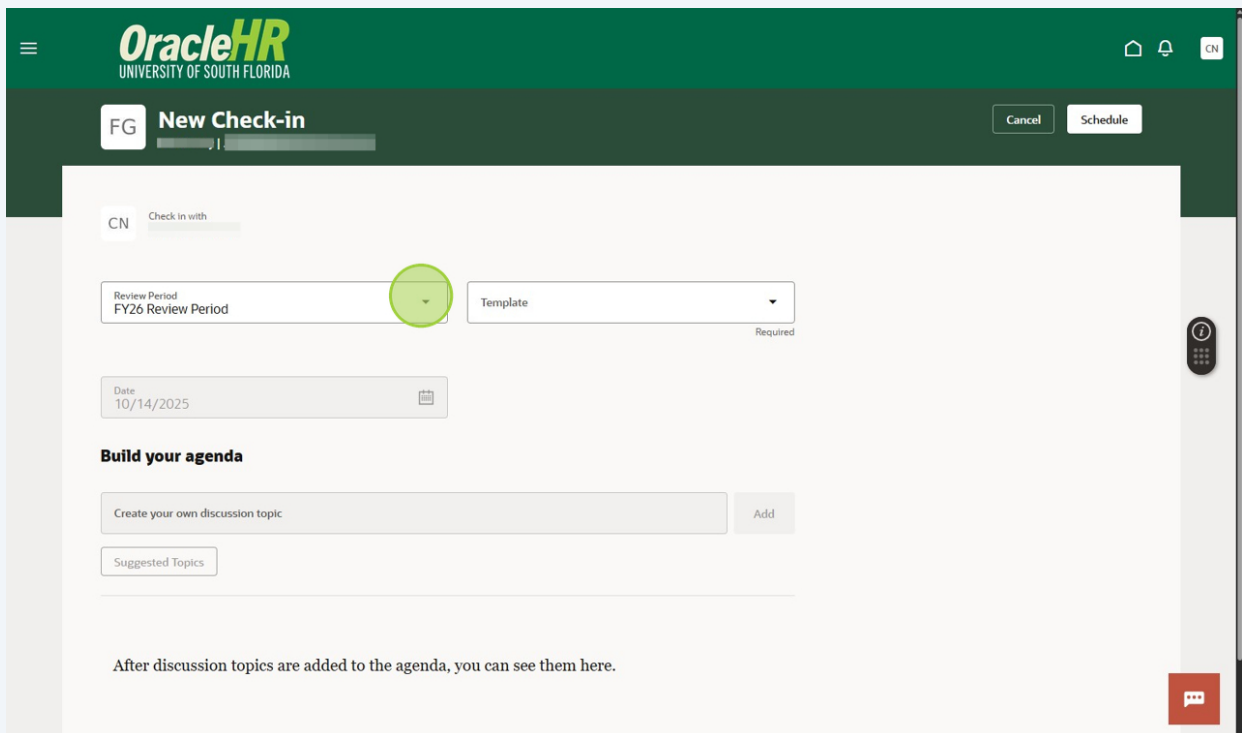
5 To the right of their name, select the ellipsis menu.

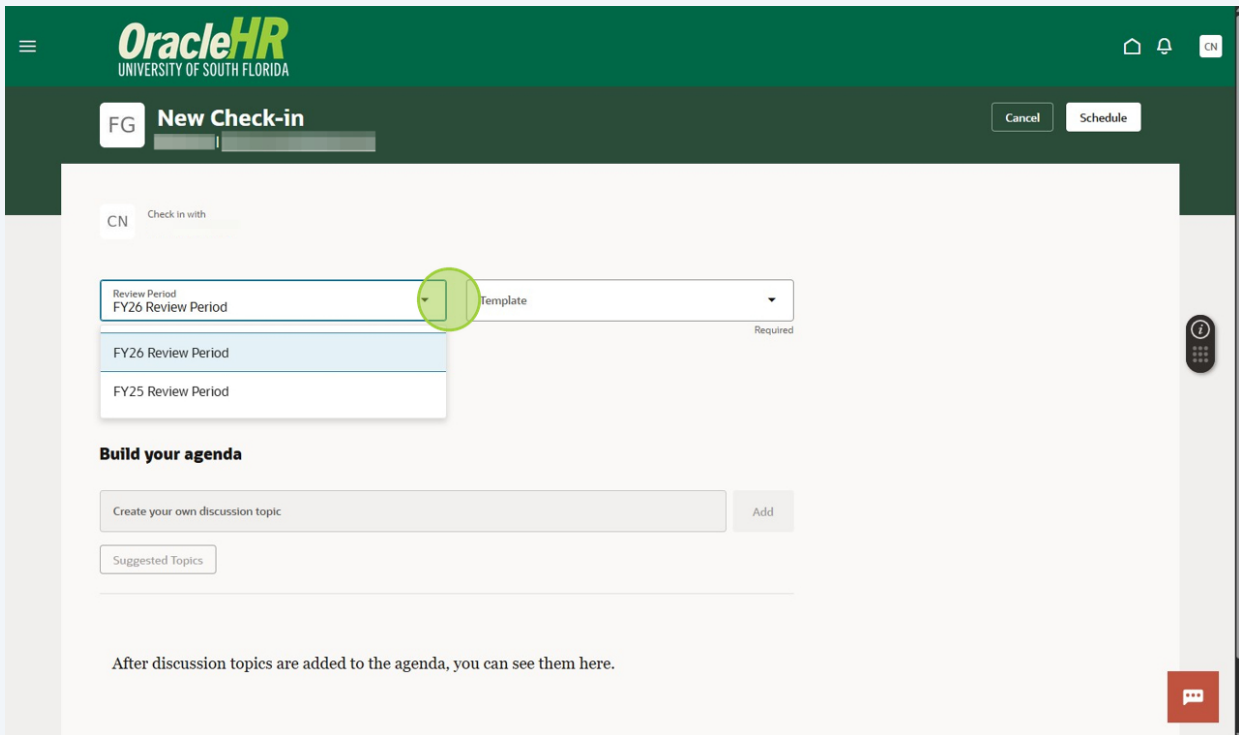
This screenshot is identical to the previous one, but with a green circle highlighting the ellipsis menu icon (three dots) to the right of the first worker's name in the team list. A red speech bubble icon is visible in the bottom right corner of the interface.

6 3. From the drop-down menu, select "Add Check-In Document".

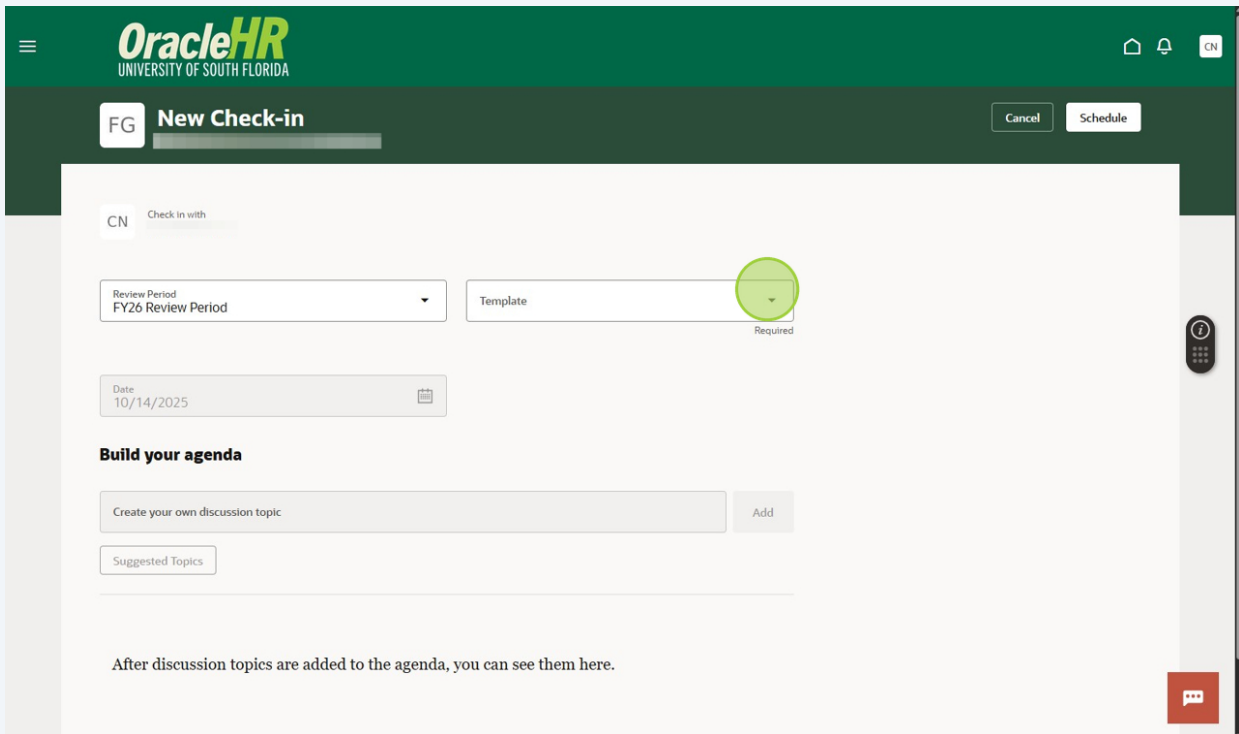


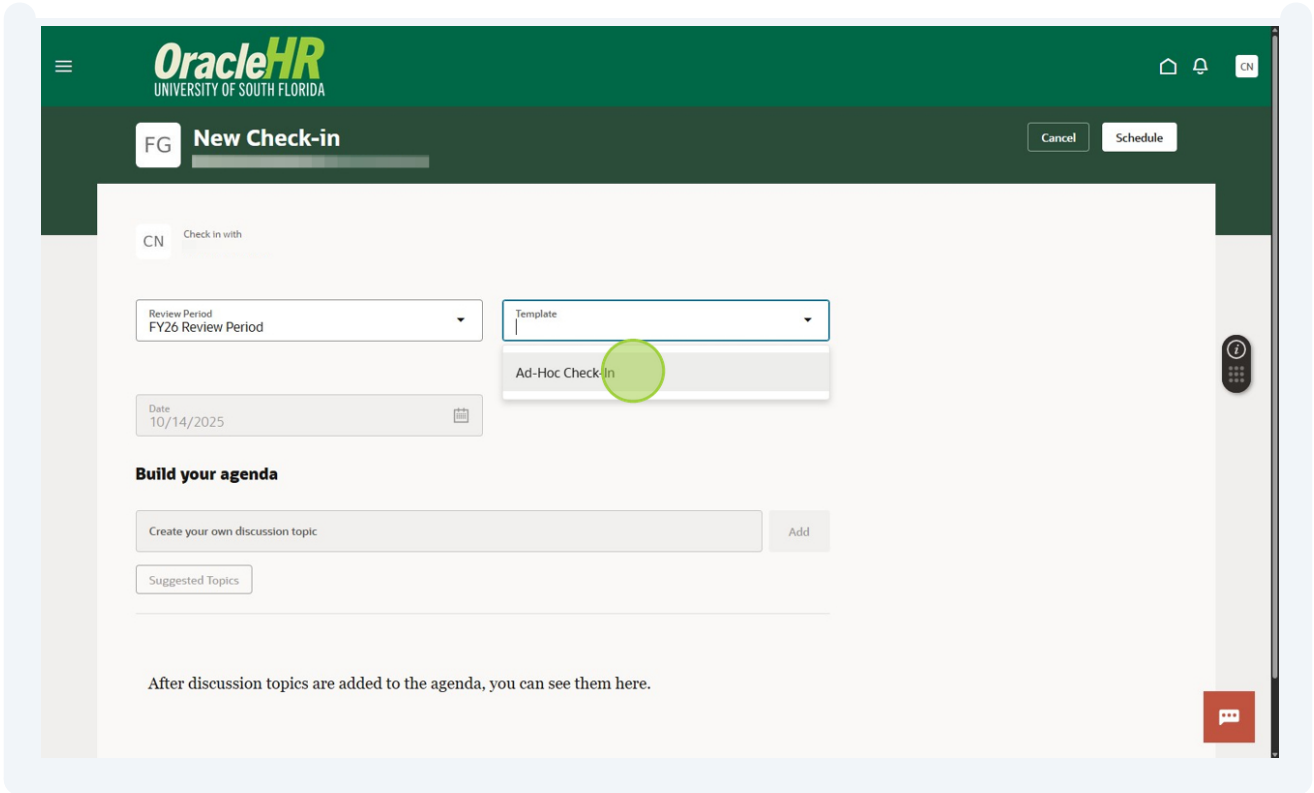
7 The "Review Period" should default to the current fiscal year (e.g., FY26). If not, use the drop-down and select the correct "Review Period".





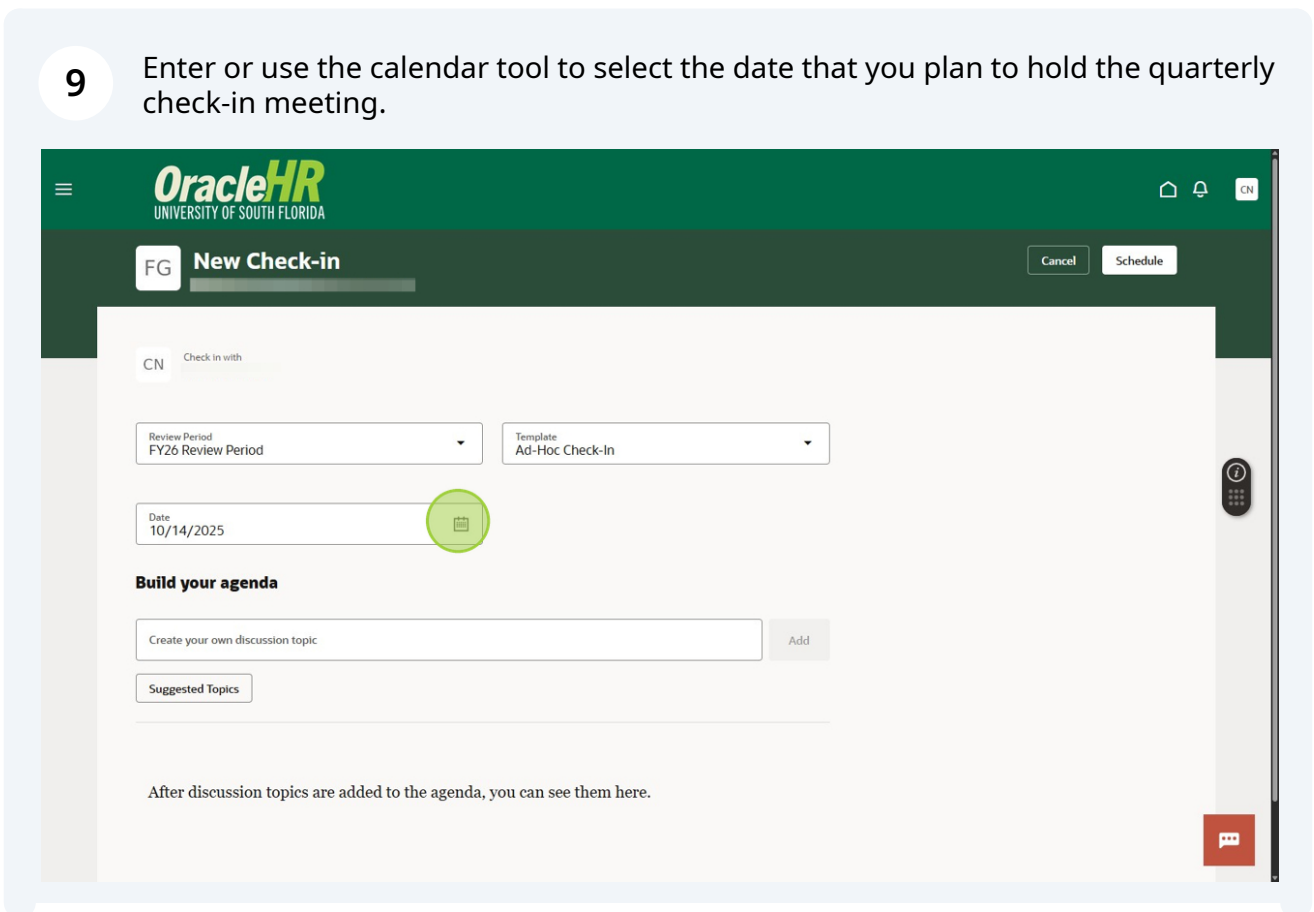
8 In the Template drop-down menu, select "Ad Hoc Check-in".





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Enter or use the calendar tool to select the date that you plan to hold the quarterly check-in meeting.



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FG New Check-in Cancel Schedule

CN Check in with

Review Period: FY26 Review Period | Template: Ad-Hoc Check-In

Date: 10/14/2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

After discussion topics are added to the agenda, you can see them here.

OracleHR UNIVERSITY OF SOUTH FLORIDA

FG New Check-in Cancel Schedule

CN Check in with

Review Period: FY26 Review Period | Template: Ad-Hoc Check-In

Date: 10/15/2025

**Build your agenda**

Create your own discussion topic Add

Suggested Topics

After discussion topics are added to the agenda, you can see them here.

10

Next you need to build the agenda for your meeting. You can customize the discussion topics for your check-in by either using the suggested topics or adding custom discussion topics.

The screenshot shows the Oracle HR 'New Check-in' form. The header includes the Oracle HR logo and 'UNIVERSITY OF SOUTH FLORIDA'. The form title is 'New Check-in' with 'FG' and 'CN' indicators. There are 'Cancel' and 'Schedule' buttons. The form contains several fields: 'Check in with' (CN), 'Review Period' (FY26 Review Period), 'Template' (Ad-Hoc Check-In), and 'Date' (10/15/2025). A section titled 'Build your agenda' is highlighted with a green border. It contains a text input field 'Create your own discussion topic' with an 'Add' button, a 'Suggested Topics' button, and a list area. Below the list area, it says 'After discussion topics are added to the agenda, you can see them here.'

11

Select "Suggested Topics".

The screenshot shows the Oracle HR 'New Check-in' form, similar to the previous one. The 'Date' field is now 10/14/2025. The 'Build your agenda' section is visible, and the 'Suggested Topics' button is highlighted with a green circle. The text 'After discussion topics are added to the agenda, you can see them here.' is also present.

12

Review the suggested topics available and add any to the Agenda that you wish. To close the menu, select the "X" in the upper right.

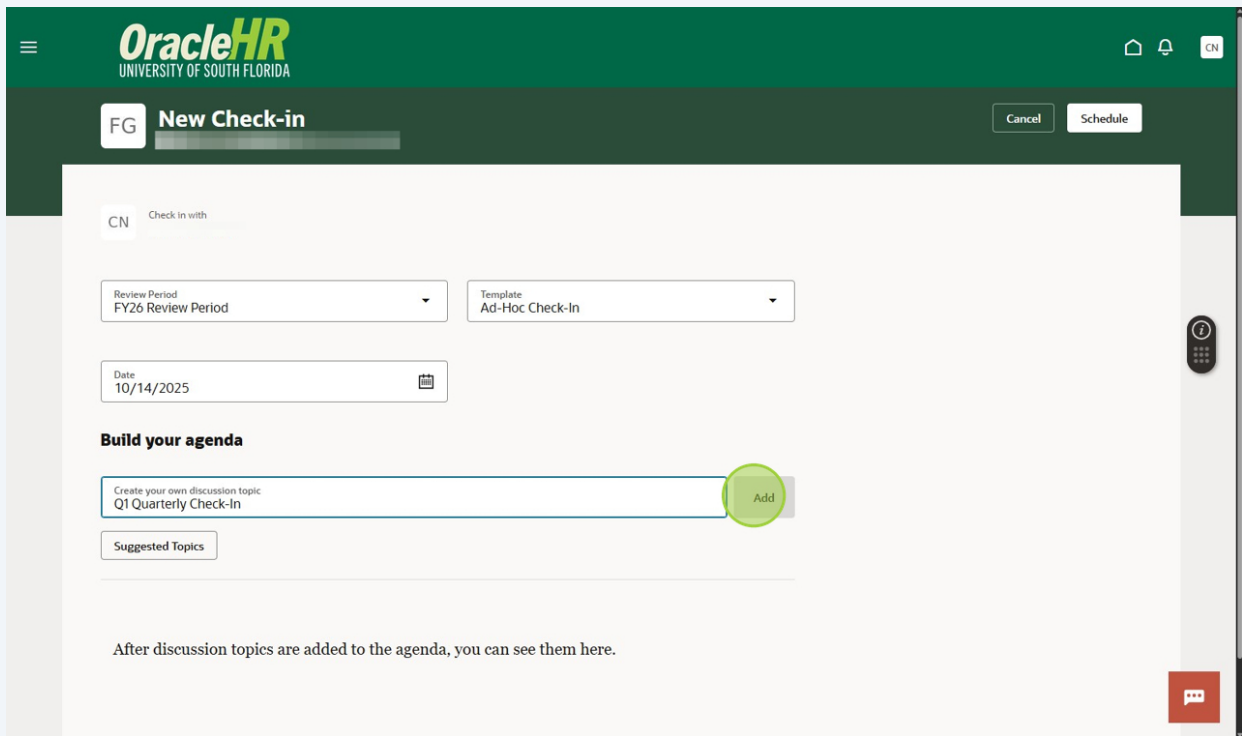
The screenshot shows the Oracle HR 'New Check-in' form. At the top, there is a green header with the Oracle HR logo and 'UNIVERSITY OF SOUTH FLORIDA'. Below the header, the form title 'New Check-in' is displayed. The form includes several input fields: 'Check in with' (set to 'CN'), 'Review Period' (set to 'FY26 Review Period'), 'Template' (set to 'Ad-Hoc Check-In'), and 'Date' (set to '10/14/2025'). There are 'Cancel' and 'Schedule' buttons at the top right. A sidebar titled 'Discussion topics' is open on the right, showing a 'Goals' section and a 'Performance goals' section with the text 'When there are performance goals to review, you'll see them here.' A green circle highlights the 'X' close button in the top right corner of the sidebar. Below the 'Build your agenda' section, there is a text input field for 'Create your own discussion topic' and an 'Add' button. A 'Suggested Topics' button is also visible. At the bottom, there is a note: 'After discussion topics are added to the agenda, you can see them here.'

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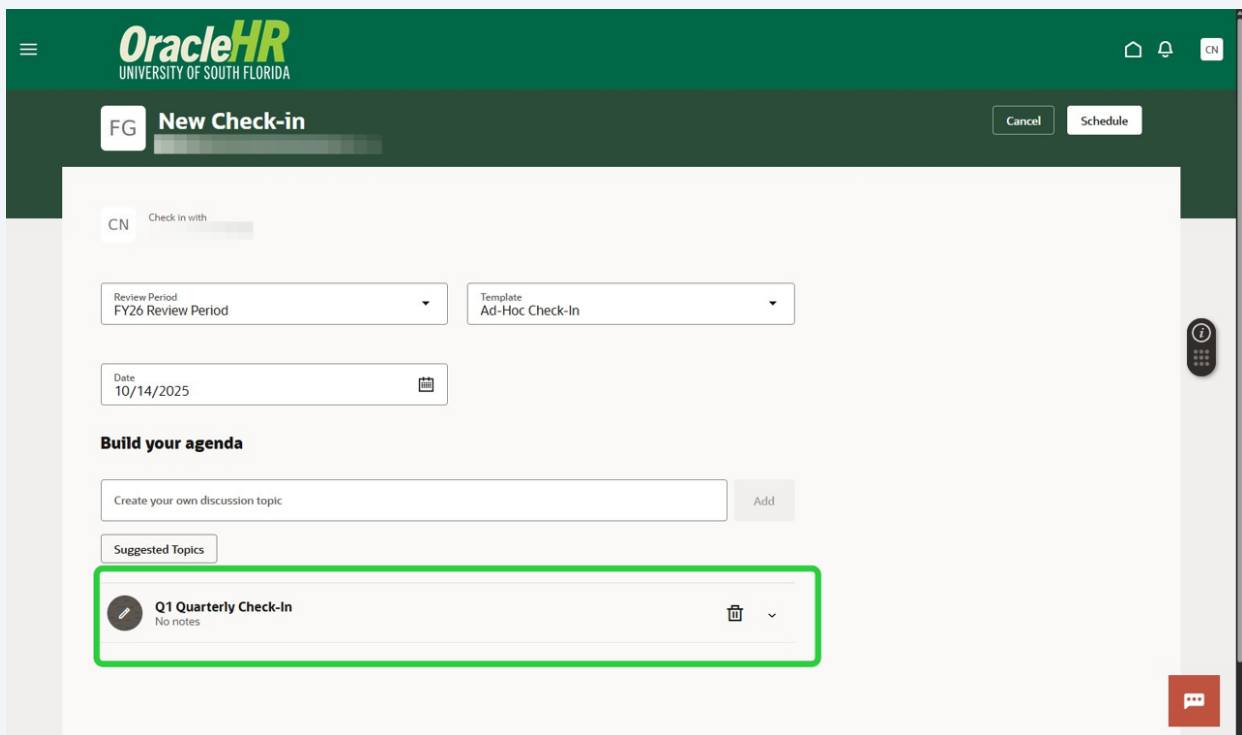
Select the "Create your own discussion topic" field. Enter in the title of your discussion item. For this example we entered "Q1 Quarterly Check-In".

This screenshot is similar to the previous one, showing the Oracle HR 'New Check-in' form. The 'Discussion topics' sidebar is now closed. The 'Create your own discussion topic' input field is highlighted with a green circle. The rest of the form, including the 'Review Period', 'Template', 'Date', and 'Add' button, remains the same. The note at the bottom is also present: 'After discussion topics are added to the agenda, you can see them here.'

14 Select "Add" to add the topic to the discussion.



15 The newly added topic displays at the bottom of the page.



## 16 Tips for Quarterly Check-Ins

- Label the discussion topic to match the quarter (e.g., Q1 Quarterly Check-In, Q2 Quarterly Check-In, etc.).
- Keep notes during the meeting directly in the check-in document for easy reference later.

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17 Repeat the steps as needed to add more topics to the discussion.

The screenshot shows the Oracle HR 'New Check-in' form. At the top, there is a green header with the Oracle HR logo and 'UNIVERSITY OF SOUTH FLORIDA'. Below the header, the form title is 'New Check-in' with a 'Cancel' button and a 'Schedule' button. The form contains several fields: 'Check in with' (CN), 'Review Period' (FY26 Review Period), 'Template' (Ad-Hoc Check-In), and 'Date' (10/14/2025). Under the 'Build your agenda' section, there is a text input field for 'Create your own discussion topic' and an 'Add' button. Below that is a 'Suggested Topics' section. A green rectangular box highlights the first suggested topic, 'Q1 Quarterly Check-In', which has 'No notes' and a trash icon. A red chat bubble icon is visible in the bottom right corner.

18 Once all discussion topics are added, select "Schedule".

This screenshot is identical to the previous one, showing the 'New Check-in' form. The 'Schedule' button in the top right corner is now highlighted with a green circle, indicating the next step in the process. All other elements, including the form fields and the highlighted 'Q1 Quarterly Check-In' topic, remain the same.

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This completes the process of how to create an Ad Hoc check-in for your employees.

