Oracle Fusion Cloud Talent Management

How can managers use Touchpoints?

FA Latest

Oracle Fusion Cloud Talent Management
How can managers use Touchpoints?

FA Latest

G42371-01

Author: Ramasubramanian Balasundaram

Contents

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 How can managers use Touchpoints?

Introduction

About this Playbook

Oracle Fusion Cloud Touchpoints, is an employee engagement and experience application that enables continuous and meaningful employee-manager conversations driven by HCM signals and employee sentiment.

As a manager, use this playbook to use Oracle Fusion Cloud Touchpoints to stay in tune with their employee's work experience, enables them to be better communicators and coaches, and helps them foster employee growth.

Assign Roles and Privileges

To access all applicable Touchpoints features, managers and employees must have appropriate user roles.

Duty Roles	Job or Abstract Role
Access Touchpoints by Worker ORA_HRE_ACCESS_TOUCHPOINTS_BY_WORKER	Employee Contingent Worker
Access Touchpoints by Manager ORA_HRE_ACCESS_TOUCHPOINTS_BY_MANAGER	Line Manager
ORA_PER_HUMAN_RESOURCE_SPECIALIST_JOB	Human Resource Specialist

Nudges

The Administrator must have the Nudge Configuration duty role (ORA_PER_NUDGE_CONFIGURATION_DUTY) to configure nudges.

Recognitions and Awards

Managers and employees must have the same user roles and privileges as Oracle Celebrate to access the recognitions and awards feature in Touchpoints:

- To access the award feature, they need to have the Access HCM Celebrate Manager Dashboard privilege (CEL_ACCESS_MANAGER_DASHBOARD_PRIV).

- To access the recognition feature, they need to have the Access HCM Celebrate Social Feed privilege (CEL_ACCESS_SOCIAL_FEED_PRIV).
- To send recognitions, the employee needs to have the Access HCM Celebrate Social Feed (ORA_CEL_ACCESS_SOCIAL_FEED) aggregate privilege.
- To send an award, the manager needs to have the Award People (CEL_AWARD_PEOPLE) function security privilege.

Check-In Options

An employee (worker) must have the HRA_MANAGE_CHECK_IN_DOCUMENT_PRIV privilege to create check-ins. Even though an employee may be assigned the role options to create check-ins, they must have this privilege to create one.

Enable Profile Options

The ORA_HRE_ENABLE_TOUCHPOINTS profile option must be enabled to use Touchpoints.

Additionally, to configure the Touchpoints check-in template to include questionnaires, skills, or competencies, you must use the Redwood version of the Check-in Templates task. To use this version, enable the profile option ORA_HRA_SETUP_REDWOOD_ENABLED.

To enable profile options:

1. Go to the Setup and Maintenance work area.
2. Search for and select the **Manage Administrator Profile Values** task.
3. Search for the required profile options.
4. Set the Profile Value field to **Y**.
5. Click **Save and Close**.

Touchpoints for Managers

Touchpoints for Managers

Use Touchpoints to understand employee sentiment better, boost engagement levels, and have informed and meaningful interactions with them.

Here's a quick overview of the various tasks that a manager can perform using Touchpoints.

Watch video

See the rest of this playbook for more information on these tasks.

The Manager's Dashboard

You can access the manager’s dashboard from **My Team** > **Touchpoints**. This dashboard has two tabs: **Summary** and **Employees**.

Summary Tab

On the Summary tab, you can view the level of interactions in your team and analyze pulse trends over time for your direct reports, dotted-line reports, indirect reports, and your organization.

> **Note:** The term dotted-line reports is used in the context of a matrix manager's reports, while the term indirect reports is used in the context of a higher level manager's reports in the organization hierarchy. The types of managers who can view the engagement metrics on this tab is configured in the **Touchpoints Configuration** task available as part of quick actions in **My Client Groups**. For more information, see the topic, *Configure the Touchpoints Appearance*.

On this tab, you can view the following metrics about employee engagement levels:

- Interaction analytics for your team and the organization, displayed as:
  - Team – Average Interactions
  - Organization – Average Interactions
  - Team – Average Check-ins
  - Organization – Average Check-ins
- Count of interactions for each employee in your team, displayed as a bar chart.
- Pulse score comparison chart, that helps you gain a better understanding of the management efforts taken to improve employee engagement levels in your immediate hierarchy and in the rest of the organization.

A few key points to consider about the analytics on this page:

- Check-ins and other interaction analytics are displayed on this page only when check-ins are scheduled and completed, or feedback, awards, or recognitions are sent or received for your team members.
- The analytics change according to the selected manager and their team of direct and dotted-line reports, if any.
- The pulse score comparison graph for indirect reports appears only if the selected manager has indirect teams reporting to them.
- If there are multiple surveys available, you can analyze pulse trends for each survey. To do this, right-click the Pulse score comparison chart and select a survey. The Pulse score comparison chart will refresh with the selected survey's scores. Note that you can view the scores only if the survey is assigned to your team.

  When you switch to another survey, it also refreshes the following pages and sections with that survey’s data:

  - Low pulse scores section on the **Summary** tab
  - Pulse score listing of employees on the **Employees** tab
  - Pulse score graph displayed on the employee’s Touchpoints page (note that you can’t switch between surveys from the graph on this page)
- The period for which the pulse score comparison graph is displayed is determined by the analysis period of the survey. It’s recommended that you set the analysis period to match with the survey frequency so that the graph is rendered in a readable manner. For example, if the survey frequency is daily and you set the analysis period to 1 month, the graph will display the past 30 days’ data, but the graph will be difficult to read. So, for a

daily frequency, it's recommended to set the analysis period to 1 week or 7 days so that you can read the pulse survey trend easily.

Similarly, consider the recommendations below:

- If the survey frequency is weekly and the analysis period is set to 4 weeks or 1 month, scores are displayed for the past 4 weeks.
- If the survey frequency is monthly and the analysis period is 4 months, scores are displayed for the past 4 months.
- If the survey frequency is yearly and the analysis period is for 5 years, scores are displayed for the past 5 years.
- If the survey frequency is set to a specific frequency, for example, every alternate day, and the analysis period is set to 1 month, scores are displayed for 15 days over the past month.

When you change the analysis period for the survey, you need to run the scheduled process, Aggregate Oracle Touchpoints Data, with the Run Type as Full. This will ensure that the graph is refreshed with the latest data.

> **Note:** The x-axis on the pulse score comparison chart shows the survey end date for each frequency. The same analysis period controls the period displayed in the pulse score chart of the individual employee as well.

View Engagement Metrics for Teams in Your Hierarchy

To view pulse trends for any team within your span of control, use the **Switch Team** button and select a manager's name. A matrix manager can switch to their dotted-line report's team. If this dotted-line report also happens to be a matrix manager, engagement metrics, pulse scores, and check-in statuses are displayed for that dotted-line report's team as well. A manager can drill down to the furthest level in the matrix or direct line hierarchy. The organization hierarchy is displayed as breadcrumbs on the Switch team panel.

Employee Low Pulse Scores

You can view the list of employees with the lowest pulse scores in the **Low pulse scores** section. This section displays the lowest pulse scores first. If an employee's pulse score falls below a threshold value, it's considered as low. This threshold value is defined in the **Schedule Allocation** tab of the survey configuration. Here, you can also see the assignment name for each employee.

Upcoming Check-ins and Overdue Check-ins

These two sections display Touchpoints and Performance check-ins that are upcoming and overdue. Check-ins include one-time and recurring Touchpoints check-ins and Performance check-ins.

The Upcoming check-ins section displays check-ins that are coming up within a specific number of days. This value is configurable using a profile option, ORA_HRE_UPCOMING_CHECKIN_THRESHOLD. The default value is 30 days, which can be changed.

The Overdue check-ins section displays check-ins that are overdue by a specific number of days. This value is configurable using a profile option, ORA_HRE_OVERDUE_CHECKIN_THRESHOLD. The default value is 30 days, which can be changed.

These sections also display the active assignment name for each employee. You can view the upcoming check-ins for indirect reports also.

From these sections, you can directly schedule a check-in by clicking the **Schedule Check-In** icon next to each employee name.

Employees Page

The Upcoming check-ins, Overdue check-ins, and Low pulse score sections display the first three employees who match the criteria in these sections. To view the remaining employees, click the **See more** link. This takes you to the Employees page with the filter corresponding to the section automatically applied. Here, you can see the full list of employees who match the filter criteria. For example, when you click the **See more** link in the Upcoming check-ins section, the Employees page is displayed with the **Upcoming check-ins** filter automatically applied.

You can also directly click the **Employees** tab to view the Employees page, but no filters are applied in this case.

The list of employees that appears on the Employees page pertains to the manager who's currently selected on the Summary page. You can see indirect reports' data also here.

For each employee, these details are displayed:

- The role name related to the assignment. If an employee has multiple assignments, their name is repeated for each assignment, along with a different role name.
- The latest pulse score of the survey selected on the Summary page. The pulse score is defined and calculated through the scoring option set on the survey questionnaire.
- A 7-day trend next to the score.

You can use the **Switch Team** button on the Employees page to view the employee data for a different manager who's in your reporting hierarchy (could be a direct or indirect manager). Note that the data on the Summary page will pertain to the manager already selected on that page. It won't change according to the manager you selected on the Employees page.

> **Note:** A matrix manager can switch to a dotted-line report's team. If this report happens to be a matrix manager, data related to engagement metrics, pulse scores, and check-in statuses is displayed for that team as well. A manager can drill down to the furthest level in the matrix or direct line hierarchy. The organization hierarchy is displayed as breadcrumbs on the Switch team panel.

You can use the **Sort By** option on the Employees page to sort the list based on the ascending or descending order of employee names, highest or lowest pulse scores, or upcoming or furthest check-ins.

Extensibility for the Manager's Dashboard

You can now display or hide the following page features by using the corresponding page property in Oracle Visual Builder Studio. They're displayed by default:

- Pulse score comparison graph on the Summary tab.
- Low pulse scores section on the Summary tab and pulse score for each employee on the Employees tab.
- Feedback Received analytic on the Interactions graph and the list view of the graph.
- Recognitions and Awards analytic on the Interactions graph and the list view of the graph.

View an Employee's Touchpoints Page

Selecting an employee's name on the Employees page takes you to their Touchpoints page. On this page, both managers and matrix managers can view all the following data for all their reports, except that the **Recommendations for you** panel isn't available for dotted-line reports.

The types of managers who can view the engagement metrics on this tab and take employee-related actions is configured in the **Touchpoints Configuration** task available as part of quick actions in **My Client Groups**. For more information, see the topic, *Configure the Touchpoints Appearance*.

Pulse score chart

You can see the past and current pulse scores for the employee over a period of time, which depends on the analysis period configured in the survey. It's recommended that you set the analysis period to match with the survey frequency so that the graph is rendered in a readable manner. For example, if the survey frequency is daily and you set the analysis period to 1 month, the graph will display the past 30 days' data, but the graph will be difficult to read. So, for a daily frequency, it's recommended to set the analysis period to 1 week or 7 days so that you can read the pulse survey trend easily. Similarly, consider the recommendations below:

- If the survey frequency is weekly and the analysis period is set to 4 weeks or 1 month, scores are displayed for the past 4 weeks.
- If the survey frequency is monthly and the analysis period is 4 months, scores are displayed for the past 4 months.
- If the survey frequency is yearly and the analysis period is for 5 years, scores are displayed for the past 5 years.
- If the survey frequency is set to a specific frequency, for example, every alternate day, and the analysis period is set to 1 month, scores are displayed for 15 days over the past month.

Note: The X-axis on the chart shows the survey end date for each frequency. This chart can be shown or hidden using a page property in Oracle Visual Builder Studio. The same analysis period controls the period displayed in the Pulse score comparison chart for the manager as well.If there are multiple surveys assigned to an employee, you can't switch between them by right-clicking the pulse survey graph on this page. You must use the Pulse score comparison chart on the **Summary** tab to switch to another survey.

Events and interactions

Here, the past interactions and upcoming check-ins for the employee appear in a timeline view. The timeline displays data for a maximum of 12 months in the past and 6 months in the future. You can also view them as a list, by clicking the list view icon.

When you view this chart before zooming out or zooming in, you'll see data for up to 3 months in the past and 1 month in the future. However, you can change this viewport by using page properties in Oracle Visual Builder Studio.

In the list view, the default view displays data for the past 12 months and future 6 months. This isn't configurable using page properties.

Past interactions include check-in meetings scheduled between you and the employee, and anytime feedback, requested feedback, awards, and recognitions that are received from you and others. This data also includes performance check-ins scheduled using Performance Management.

You can sort the list view by the type of interaction, in alphabetical order or the date of the interaction. By default, the list is sorted based on the type of interaction, from A to Z.

Recommendations for you

The Recommendations for you panel lists recommended actions or nudges related to your direct reports that encourage interactions with them to achieve overall increased engagement. These recommended actions, when configured by the administrator using the Nudge Configuration work area, include the following:

- Schedule a check-in with them
- Recognize their personal milestones such as birthdays and anniversaries and achievements such as completing a goal early
- Provide feedback to them
- Prepare for an upcoming check-in
- Discuss performance goals that are at risk of delay
- Discuss pulse survey scores and survey response rates

You can dismiss a recommendation by clicking the **Dismiss** icon next to the action button.

This panel can be shown or hidden using a page property in Oracle Visual Builder Studio.

Promote Engagement through Interactions

Schedule a Check-In With Your Employee

Regular check-ins helps employees discuss concerns and share sentiments in a timely manner so that managers can address them effectively. You can schedule check-ins with your direct reports, indirect reports, and dotted-line reports.

To get started, click the **Employees** tab on your Touchpoints application. Select an employee's name to view their Touchpoints page and click the **Schedule Check-In** button. You can also click the **Schedule Check-In** button, if it appears as a recommended action in the **Recommendations for you** panel.

If you're an indirect manager, you can schedule a Touchpoints check-in for any employee in your hierarchy. To do so, click the **Switch Team** button on the manager’s dashboard and select a manager who reports to you. The dashboard refreshes with the selected manager’s engagement details. Click the **Employees** tab on the dashboard and schedule a check-in with any indirect report using the **Actions** menu (represented by three dots).

When scheduling a check-in, you can do these:

- When an employee has multiple assignments, you can choose the assignment that you want to discuss during the check-in.
- Build an agenda that suits your needs.
- Add your own discussion topics or choose from a list of suggested topics. To view these topics, click the **Suggested Topics** button.
- Create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar.

Suggested discussion topics are of the following types, displayed across the following tabs:

- **Suggestions**: Displays GenAI-based personalized discussion topics that are geared toward an employee's career development. These topics are based on the employee's job or position title, department, job description and responsibilities, goals, and other relevant factors. You'll see a maximum of three such topics. Below this list, you might also see nudge-based topics. For example, if you haven't given feedback to an employee for a long period of time, or if the employee has a goal that's not started even past the goal start date, these tasks are suggested as topics to be added to the check-in.

  On this tab, you might also see open topics from previous check-ins. Any topics that you hadn't marked as discussed will be available for you to transfer to the current check-in that you're scheduling. Topics from check-ins in the recent past are displayed first, followed by topics from earlier check-ins. You can't transfer questionnaires and feedback topics, even if they were open in previous check-ins.

  > **Note:** Nudge-based topic suggestions appear only for direct reports. They aren't available for dotted-line reports.

  The **Suggestions** tab can be shown or hidden using the corresponding page property in Oracle Visual Builder Studio. If the Touchpoints check-in template is configured not to display AI-based discussion topics, nudge-based topics, and open topics from previous check-ins, the **Suggestions** tab will also not be displayed.
- **Goals**: Displays performance goals from active goal plans whose review period end dates fall within the last 18 months. The tab also include active development goals. Goals with no target completion dates are displayed first, followed by goals with target completion dates in descending order.

  > **Note:** When you want to add a performance goal to a check-in, it's added to any existing check-in that's coming up within the next 7 days. If there's no check-in coming up, the performance goal is added to a new check-in.
- **Feedback** topics, which include anytime feedback given to the employee that you can add to the check-in for relevant discussions.
- **Competencies**, if they're configured in the check-in template. You can select active competencies from the employee's profile and add them to the check-in as discussion topics.
- **Skills**, if they're configured in the check-in template. You can add attained and developing dynamic skills from Skills Center to the check-in as discussion topics.

> **Note:** If questionnaires are configured in the check-in template, they're added by default as discussion topics. Questionnaires might be present for both workers and managers, if they're configured in the template.

After adding these topics to the check-in, you can do the following (before you schedule the check-in):

- Add notes to the discussion topics.
- Delete the topics that you just added.
- Click the skill chip to rate the skill and view or invite endorsements for the employee on that skill.
- Edit a performance or development goal after you add it to a check-in from the **Goals** tab. After you edit the goal, it'll be sent for approval according to predefined approval rules. Note that you can't edit a goal when it's in a pending approval status.

> **Note:** Notes added to a discussion topic are visible in other check-ins, if that discussion topic is added to those check-ins. These notes are also called as progress notes. To view them, expand a discussion topic on the check-in page, and click **View goal details** for a goal topic, **View progress notes** for a skill or general discussion topic, and **View competency details** for a competency topic. The progress notes for skills and competencies are carried over only from check-ins that are created for the same assignment in the last 12 months.After you add an open discussion topic from a previous check-in, you can view progress notes for that topic, if notes were previously added to it. This applies to a goal, skill, competency, or general discussion topic.

After you schedule the check-in, you can modify the check-in and change these details. See the topic, *Managers - Modify a Check-In* for more information.

The number of topics marked as Not Discussed and the total number of topics in the check-in are indicated in the cards displayed on the **Events and interactions** timeline.

When you schedule a check-in, the employee receives an email notification a few days before the check-in date, depending on the nudge configuration. They can then modify the check-in by adding their own discussion topics, or by adding notes to the existing discussion topics.

> **Note:** You can schedule only one check-in per day with an employee.

Related Topics

- Schedule a Recurring Check-In
- Check-In Documents

Managers - Modify a Check-In

As a manager, you can view and modify a past or upcoming check-in by double-clicking it from the Events and interactions section. You can modify Touchpoints check-ins and Performance check-ins.

Modifying a Touchpoints Check-In

While modifying a Touchpoints check-in, you can do these:

- View progress notes and other details for goal-related discussion topics and add your progress notes.
- View questionnaires, if any, and add your responses to the manager's questionnaire.
- View progress notes for skills and competencies and add your progress notes.
- View feedback comments.
- Click a skill chip to mark it as attained, and view endorsements from others on that skill. If it's a skill you've endorsed, you can remove the endorsement.
- Add new discussion topics.
- Edit the title of the custom discussion topics that you added.
- Add notes to all discussion topics or edit the notes that you added.
- Mark completed discussion topics as discussed.
- Delete a discussion topic, only if:
    - You created it.
    - It has notes that only you added.
    - It's not marked as discussed.

- Change the check-in date.
- Update the meeting invite details, if check-in includes an invite. To do this, you need to open the check-in and click the **Meeting invite** link.

Note:

- If you're an indirect manager, you can only view check-ins, both past and upcoming. You can't modify check-ins.
- You can add nudge-based topics only while modifying upcoming check-ins.
- You can delete a check-in only if you created it and it doesn't have any notes that others added to any of its discussion topics. But it can have notes that you added to its discussion topics. Also, the check-in shouldn't contain any discussion topics that are marked as discussed.

Modifying a Performance Check-In

You can update a Performance check-in from Touchpoints by:

- Changing the check-in date
- Adding or removing custom or recommended discussion topics
- Adding notes to discussion topics
- Marking topics as discussed

You can also delete a Performance check-in. These changes are reflected in Performance Management as well.

Send Feedback

Sending timely feedback on an employee's work performance improves overall productivity. You can send feedback to your direct reports and dotted-line reports.

To get started, click the **Employees** tab on the Touchpoints landing page and select an employee. Next, select the **Send Feedback** option from the **Actions** menu, or click the **Send Feedback** button, if it appears as a recommended action in the **Recommendations for you** panel.

While sending feedback, you can add attachments to support your comments. You can also set the feedback visibility to one of these:

- Everyone
- Managers only
- Managers and employee
- Only me
- Only employee and me

You can also send a thank you note to anyone who gave feedback to a team member.

To send a thank you note, double-click the feedback from the **Events and interactions** section and select the **Send Thank You** option from the Actions menu.

> **Note:** You can send a thank you note only if the alert notification template, Manager/HR Thanks Anytime Feedback Provider, which is part of the **Anytime Feedback Provided** alert, is enabled in Alerts Composer.

Related Topics

- Anytime Feedback

Recognize and Award Employees

The Recognition and Award features of Oracle Celebrate are integrated with Touchpoints and offer more options to award and recognize employees for their achievements and milestones.

> **Note:** These replace the Celebrate Event feature that was present until the 24C upgrade. Therefore, the **Actions** menu on your Touchpoints page now displays two options – **Recognize** and **Send Award**, instead of **Celebrate Event**, when you have the required privilege added to your role.

Recognition programs can be created by the administrator to appreciate employees and celebrate milestones such as birthdays and work anniversaries, while award programs can be created for celebrating key achievements. When these programs are created, they're available in Oracle Celebrate and Touchpoints. For more details on creating recognition and award programs, see the topic *Create Programs*.

Recognition programs are usually configured to promote your organization's cultural values. Recognitions appear on the employee's Events and Interactions timeline as soon as they're sent.

Awards might go through an approval process through the management hierarchy, if approval rules are configured by the Administrator. When the awards are approved, the employee receives them and they also appear in the Events and Interactions timeline of the employee's Touchpoints page.

You can send awards and recognitions by navigating to **My Team** > **Touchpoints** and selecting an employee from the **Employees** tab and clicking the **Actions**menu.

Managers can send awards to their direct and indirect reports. They can send recognitions to anyone in the organization.

Here are a few things to consider about recognitions and awards:

- Awards and recognitions sent from the Celebrate application will also reflect in the employee's Events and Interactions timeline. Similarly, any award or recognition sent from Touchpoints will be visible in Celebrate.
- If there are existing Celebration events displayed on the Events and Interactions timeline, they will continue to be displayed until the timeline period is over. You can click them to view the details on the drawer panel.
- To send recognitions or awards from Touchpoints, the requirements are the same as for HCM Celebrate:
  - At least one recognition or award program needs to exist.
  - The recipient of the recognition or award program needs to be eligible to the program.

Related Topics

- Assign Roles and Privileges
- Introduction to Oracle Celebrate

Other Tasks

Suggested Actions After a Check-In Discussion

GenAI-powered performance and development goals are now suggested as an outcome of check-in discussion.

The goals are relevant to the employee's job title, department, role description, role responsibilities, check-in details, and existing goals.

When you click the **Suggested Actions** button on a check-in page, three goals are displayed. You can then add them as follow-up actions after the check-in discussion is completed.

Request Feedback Using Touchpoints

As an employee, you can now request feedback from your manager or peers using Touchpoints. As a manager, you can request others in the organization to give feedback about your team members.

You can request two types of feedback: general feedback or feedback on performance goals.

- To request feedback for yourself, go to your Touchpoints page and select **Request Feedback** from the **Actions** menu.
- To request feedback for a team member, click the **Employees** tab on the Touchpoints Summary page. From the **Actions** menu next to an employee, select **Request Feedback**.

To request feedback, these feedback templates must exist in the Feedback Templates section in Performance Management:

- For general feedback, you can have one or more active general feedback templates.
- For feedback on goals, you must have one active performance goal feedback template.

A few points to note:

- You can request feedback from your manager, direct peers, or anyone in the organization. You can request feedback from multiple employees as part of the same feedback request.
- You can choose as many performance goals as you want to request feedback on.
- For general feedback, you can select the questionnaire that you want to attach to the request, if more than one general feedback template exists. For feedback on goals, questions from the most recent performance goal feedback template are automatically included in the request.
- You can add your own questions to the questionnaire, if the questionnaire template supports additional questions. When requesting feedback on goals, all questions are repeated for each performance goal in the request sent to the feedback provider.
- When employees request feedback, they can choose to share the received feedback with their manager or with themselves. When a manager requests feedback for an employee, they can choose to share the received feedback with the employee.
- You can specify a due date for completing the feedback and add an optional message to the feedback provider.

After an employee has received feedback, they can view it in the **Events and interactions** timeline on their Touchpoints page. Managers can view the feedback received by their employees in the **Events and interactions** timeline on the employee's Touchpoints page. However, the feedback appears in the timeline only if it's shared with the manager.

As a manager or employee, you can view and add the received feedback as a discussion topic to a check-in agenda. To do this, click the **Feedback** tab on the **Recommended topics** panel of the check-in page. To view the complete feedback, click the **View more** link on this tab.

Average Team Interaction Analytics

Any feedback that an employee or manager has requested is added to the **Average Team Interactions** analytics displayed on the manager's Touchpoints Summary page. This includes feedback requested on goals as well.

Notifications

The feedback provider receives a notification in these scenarios:

- A manager or employee requests feedback from them.
- The due date for providing requested feedback nears.
- A manager or employee thanks them for their feedback.

The feedback provider receives a separate notification for each performance goal included as part of the request.

The person who requests feedback receives a notification when the feedback is completed or revised. The manager also receives a notification about completed or revised feedback, if the feedback is shared with them.

Related Topics

- Requested Feedback
- How can I create a feedback template for performance goals?

Schedule a Recurring Check-In

As a manager or an employee, you can schedule recurring check-ins in Touchpoints according to the frequency of your choice. You can also add recurring discussion topics to these check-ins, as required.

You can schedule recurring check-ins on a daily, weekly, monthly, or yearly basis.

Here's some info regarding each scheduling frequency:

- Daily recurrence: You can end the daily recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 7, check-ins are scheduled every day for 7 days, starting from the first check-in date.
- Weekly recurrence: You can end the weekly recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 4, check-ins are scheduled weekly once for 4 weeks, starting from the first check-in date.
- Monthly recurrence: You can choose to repeat the check-ins on a specific date or day of the month. For example, schedule a check-in on the 21st of every month or every second Monday of every month. You can end the monthly recurrence by specifying an end date or the number of recurrences.
- Yearly recurrence: Select the month when you want to schedule the first check-in, and then repeat the check-in on a specific date or day of that month. For example, schedule the first check-in on January 2 each year, or every first Monday of January each year. You can end the yearly recurrence by specifying an end date or the number of recurrences.

If an employee has multiple assignments, a manager can select the assignment relevant to the check-in.

As an employee, if you have multiple assignments that report to a single manager, you can select the assignment relevant to the check-in. If you have multiple managers, you can select the manager with whom you want to schedule the check-in. This includes matrix managers as well.

As an employee, you can view recurring check-ins in the **Events and interactions** timeline on your Touchpoints page.

As a manager, you can view recurring check-ins in the **Events and interactions** timeline on the Touchpoints page of the employee that you select.

> **Note:** When you schedule recurring check-ins, ensure that the dates of the check-ins don't conflict with already scheduled check-ins. If they conflict, and you proceed to create the recurring series, the conflicting check-ins aren't created as part of this series. However, the other check-ins that don't conflict are created in the series, and they appear in the **Events and interactions** timeline.When you schedule a recurring check-in, you can create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar. The manager and employee receive a notification when a recurring series is scheduled.

Related Topics

- Manage a Recurring Check-In
- Manage Recurring Discussion Topics

Manage a Recurring Check-In

Here are a few points to consider when modifying or deleting a recurring check-in series:

Modify a Recurring Series

After creating a recurring series, you can change the frequency, start and end dates, or the number of occurrences in the series. You can make these changes to past and future checks-ins in the series. You can also add recurring discussion topics. But you can't change the assignment of the employee, when they have multiple assignments.

If your recurring check-in has a meeting invite, and you want to change the meeting invite details, you can choose to update the meeting invites in all the future check-ins, or make the update only in the current check-in.

When you change the frequency of a recurring check-in, meeting invites, if any, will get automatically updated and downloaded.

You can modify the series only if:

- You created it.
- The check-ins don't contain discussion topics that are marked as discussed.
- The check-ins don't contain notes added by others.

Delete a Recurring Series

You can choose to delete any check-in a series, or all check-ins in the series, only if you created the series. You can't delete a check-in if:

- It has discussion topics that are marked as discussed.
- It has discussion topics with notes added by others.

When deleting a recurring series, only the current and future check-ins are deleted, when they match the above conditions.

The manager and employee receive a notification when a recurring series is deleted.

Manage Recurring Discussion Topics

After creating a recurring check-in series, you can add recurring discussion topics to the check-ins in the series. You can also edit and delete the recurring discussion topics based on certain criteria.

Add Recurring Discussion Topics

Here are a few points to consider:

- A discussion topic added to the first check-in in a recurring series is automatically added to the rest of the check-ins in that series. This includes your own discussion topics as well as recommended topics related to goals, feedback, skills, competencies, or Insights.
- If you add notes to a discussion topic in the first check-in of a series, those notes aren't carried over to the same discussion topic that might be present in the other check-ins in the series. However, progress notes added to skills and competencies are carried over to other check-ins in the series, wherever those skills and competencies are present in the series.
- Only two notes can be added to a discussion topic, one by the employee and another by the manager.

Edit Recurring Discussion Topics

When you edit a discussion topic in any check-in in a recurring series, these considerations apply:

- You have the option to carry over those edits to the same recurring discussion topic that might be present in the remaining check-ins.
- If you add a new discussion topic to a check-in, it's not carried over to the remaining check-ins.
- You can add your own discussion topics and goals, feedback, skills, competencies, or Insights topics from the **Recommended topics** panel to any check-in.

Delete Recurring Discussion Topics

You can delete a discussion topic from any recurring check-in in a series only if it meets these criteria:

- You created the discussion topic.
- It's not already marked as discussed.
- It doesn't contain notes added by others.

The manager and employee receive a notification when a recurring discussion topic is deleted.