

Performance Conversations in Dayforce

Performance Management Module

Version 1: December 27, 2024

Introduction

In **Performance > Conversation**, section, you can engage in ongoing discussions with your manager and other tagged individuals throughout the year. While the main goal of these conversations is to update your manager on your progress, they also enable employees to monitor their own progress on assigned goals, gain clarity on goal-related activities, and document feedback on goal achievement.

When starting a conversation, you will be asked to choose a category and set the visibility of your post. Category options are:

Category	Description of Use
Appreciation	A “thank you” for a job well done, contributions, and/or above and beyond performance
Career Development	Use for conversation about career or professional development goals and activities
Other	Miscellaneous category use for conversation that do not fall within another category
Performance Feedback	Use for feedback specific to a performance goal or competency
Personal Feedback	Use for personal feedback
Questions	Use for general questions not related to another category

Visibility options help ensure that the right people see your message. Employees can choose from three options:

- Tagged People + Their Direct Managers
- Tagged People Only
- Only Me

The screenshot shows the top portion of a conversation creation form. At the top, there are three icons: a refresh icon labeled 'Refresh', a funnel icon labeled 'Filter', and a sort icon labeled 'Sort'. Below these is a large text input field with a person icon on the left and a diagonal line on the right. Underneath the input field, there are two rows of options, each preceded by a yellow star icon. The first row is labeled 'Display to:' and has a dropdown menu currently set to 'Tagged People + Their Direct Managers'. To the right of this dropdown are two buttons: 'Post' and 'Cancel'. The second row is labeled 'Category *' and has a dropdown menu currently set to 'Select an Option...'.


Important: Visibility settings cannot be changed once the conversation has been posted.

Conversation Basics

Starting a Conversation


1. Select the **Performance** option from the left-hand navigation panel.
2. Click the **Conversations** tab
3. Use the **Comment** box to compose your comments.
4. In the same **Comment** box, tag your manager and/or others directly related to the goal by typing @name. Chose the appropriate person(s).
5. Choose a **Category**
6. In the **Display to** list, choose the who should have visibility to the conversation.
7. Click **Post**.

Add Conversation to a Goal

1. Go to **Performance**
2. Click the **Goals** tab.
3. Click on the conversations icon for the goal. 
4. Use the **Comment** box to compose your comment.
5. Choose a **Category**
6. Click **Post**.

Like Conversations or Comments

You can like or unlike your own conversation posts, as well as those made by other users. Liking is useful for highlighting a comment that stood out during the year.

To like a post, click the associated like icon (.

After you like the post, the icon turns dark blue and filled in. You can click the icon again to unlike the post (if it is your like that you are changing; you cannot change other users' likes). For each conversation or comment, Dayforce also displays the total number of likes to the right of the icon.

Reply to Conversations or Comments

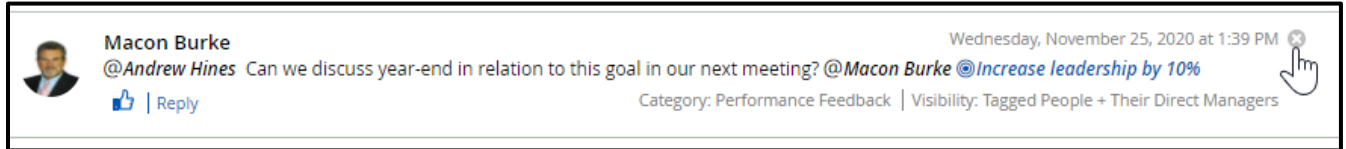
To add a reply to a conversation post:

1. Click **Reply** for the post that you want to reply to. A reply text box opens.
2. Enter the text that you want to reply with, and then click **Post**. The reply is added below the conversation in a reverse chronological thread.

If needed, you can click Comments to expand or collapse the comment thread below a conversation.

Delete Conversations

To delete a conversation, hover the cursor over the top-right corner of the comment to display the **X**, then click the **X** to delete the comment, as shown in the following image:



You will only see the **X** option on comments you have permission to delete.

Searching for a Conversation

To use **Filter** to search:

1. Click on the **Filter** icon to open **Filter** panel.
2. Do the following, depending on how you want to filter the conversations:
 - Search: To search for specific text, enter all or part of the term in the text box.

For example, if you enter #sa in the Search field, the application might suggest the keywords "sales" and "sandbox". When you select #sandbox and click Apply Filter, the conversation list is filtered to display only those conversations that mention the #sandbox keyword.

Note: You cannot filter by author name; you can only filter by the content in conversations and any tags added to the conversation.

- Category: To filter for conversations linked to a specific conversation category, select one or more category names in the Category drop-down list.
- Creation Date: To filter conversations created during a defined date range, enter a start and end date in the Creation Date fields. For example, if you want to see all conversations posted in June 2019, enter June 1, 2019 in the first field and June 30, 2019 in the second field.

3. **Show Direct Reports:** To display only conversations authored by you or your direct reports, and conversations in which either you or your direct reports are tagged, select the checkbox. The checkbox is cleared by default.
4. Click **Apply Filter** to filter the conversations.

To use **Sort** to search:

1. You can select how conversations are sorted using the **Sort** button.
2. Click **Sort** to expand a drop-down list from which you can select a sort option, either **Most Recent** or **Oldest First**