HealthcareSource Performance Manager

WENTWORTH-DOUGLASS HOSPITAL
MASSACHUSETTS GENERAL HOSPITAL SUBSIDIARY

REFERENCE GUIDE

January, 2018

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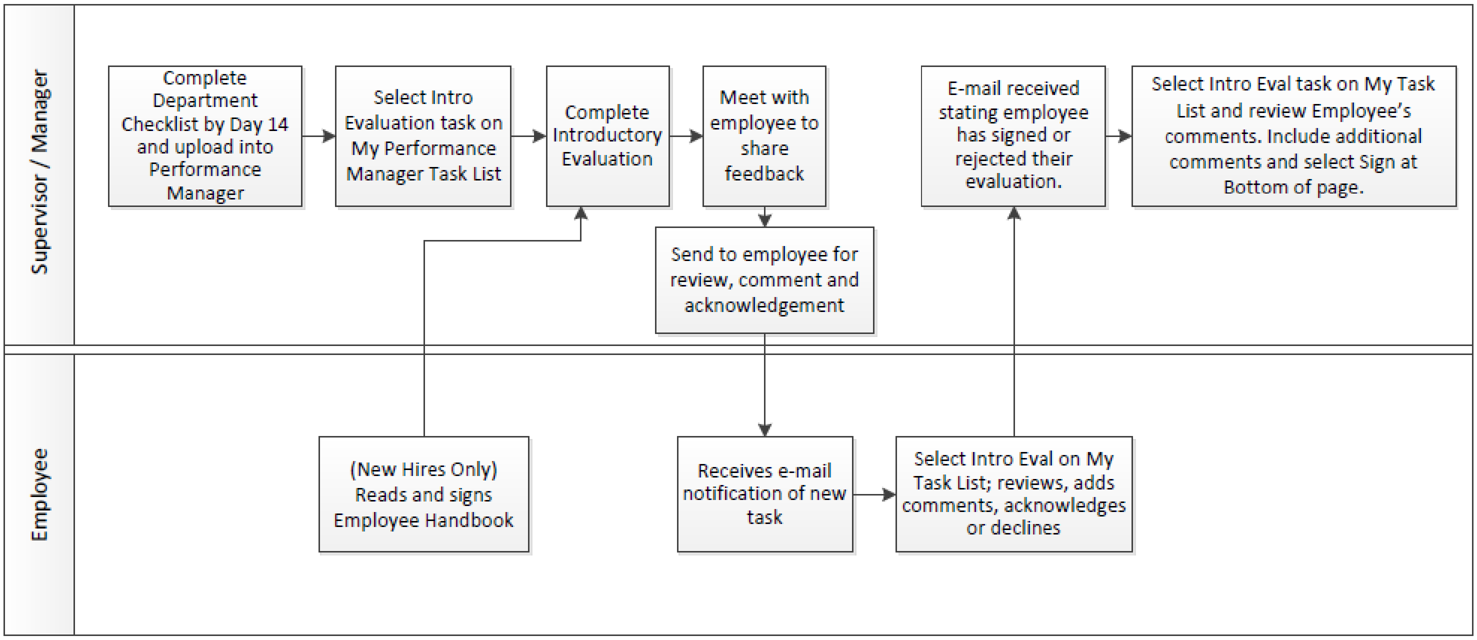
Introductory Evaluation for New Hires and Transfers



<u>Supervisor/Manager:</u>

Introductory Evaluations - Complete Department Checklist:

1. Within 14 days of hire or transfer, you must complete the hardcopy Department Checklist form (found on The Beacon) indicating the date each item was reviewed as well as who reviewed it with the employee.
2. Scan and upload Department Checklist into Performance Manager.
   - Scan the completed paper document and save a copy of it to a drive on your computer.
   - In Performance Manager, select Employees and then Employee Lists.
   - In the Employee List, select Add in the Employee File column for the employee you are evaluating.
   - Select Document in the drop down box that will appear.
   - An Add Document pop up will appear. Select Browse and find the file name of the file you saved in the first step.
   - Highlight the file name and select Open. The file name will appear and then select Save Document. The document is now attached to the employees' performance record.
3. On the Main Menu at the top of the page, select My Folder then select Tasks.
4. Select the Department Checklist task from the task list for the employee being completed
5. A Skills Checklist page will appear - click Expand All to see the checklist.
6. Click Yes to validate that you have completed the checklist and enter the date it was completed with the employee. Add any comments as necessary.
7. Click Save This Item at the bottom of the screen and then click Complete This Checklist just below that to finish the process.

Supervisor/Manager (cont.):

Introductory Evaluations - Complete Introductory Evaluation:

1. On My Task List in Performance Manager, select the Introductory Evaluation Task for the employee.
2. Click on Manager Appraisal box and then click Continue. This will open your employee's Introductory Evaluation.
3. Respond to all items in the 3rd section by clicking the appropriate radio buttons.
4. Enter comments as appropriate to document demonstrated level of performance.
5. Save documents and schedule meeting to discuss elements of performance with your employee and set goals for the coming 9 months.
6. Once you have met with your employee, in the Evaluation document enter the date of the Introductory Evaluation discussion in the Date Reviewed with employee box near the bottom of the screen. Click Save and Send. This sends a notification to the employee.
7. You will receive an e-mail notification once your employee signs the Introductory Evaluation.
8. On My Task List in Performance Manager, select View Employee Comments for your employee.
9. Ensure the employee has signed the Employee Handbook Acknowledgement before finalizing Introductory Evaluation.
10. Sign based on your employee's comments.

Supervisor/Manager Helpful Hint:

- You will receive an e-mail notification that a new task has been assigned on the employee's first day.
- You will receive an e-mail notification that the introductory Evaluation is due 7 days before the due date.
- You will receive reminder emails at predefined intervals to prompt you to complete the Intro Evaluation if it is not complete by the due date.
- If departments have an additional checklist for orientation, please retain that in the employee's department file.
- If this employee holds a different license from their Supervisor, be sure to obtain documentation of attainment on their clinical competency from someone who holds that license/certification.

Employee:

Introductory Evaluations - Read and Sign Employee Handbook Acknowledgement:

1. On My Task List in Performance Manager, select Employee Handbook Acknowledgement task.
2. Read Employee Handbook, including the last page which acknowledges you have read and understand the content.
3. Scroll to the bottom of the screen and click Sign if you are ready to sign the acknowledgement.
4. If you have questions about the Handbook, please speak with your manager.

Introductory Evaluations - Review and Respond to Introductory Evaluation:

1. On My Task List in Performance Manager, select Intro Evaluation.
2. Review the information provided by your manager and discussed at your Introductory Evaluation meeting.
3. At the bottom you may enter any comments about your introductory review period.
4. If you are not in agreement with information provided by your manager, please enter appropriate response in the Comments Section.
5. Click Sign. Your manager will be notified you have signed to acknowledge receipt of your Introductory Evaluation.

Employee Helpful Hint:

- You will receive an e-mail notification that your manager has sent your Introductory Evaluation for comment.
- You can find your Intro Eval by Filtering the Task Types listed on the left side of your screen to Appraisal – Review Appraisal.

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Adding Goals After Introductory Eval

Supervisor/Manager:

Adding Goals:

1. After you have completed the Introductory Evaluation, you will receive an e-mail notification that a Performance Goals task has been created.
2. On My Task List, select the Performance Goals task.
3. On the Individual Goals page, select the Actions drop down on the right side of the page.
4. Select Add Goal.
5. Add a goal pop-up box will appear.
6. **Title*** - Name of the goal being created.
7. **Description** – if you wish to include specific action items or more details about expected outcomes, please include them here.
8. **Align To*** - this drop down highlights the organizational pillars to which Goals should align.
9. **Weight** – for a single goal, this weighting should be 100. For multiple goals, you have the flexibility to assign weighting based on the size and scope of the goals. When combined, all goal weights must equal 100.
10. **Due Date* -** when the goal is expected to be complete.
11. **Percent Complete** – not changed initially; however, both you and the Employee have the ability to update this throughout the goal year.
12. **Manager Notes** – any additional comments can be included here.
13. To Add this goal select Add at the bottom of the page. (Please Note: If you wish to add this goal to additional employees, please select the Add and Distribute button. This will display all of the individuals who report to you (direct and indirect) and by clicking the box next to their name, they will also be assigned this goal.)
14. Continue adding goals using the above process until complete.
15. To edit any of the previously created goals, select the 3 vertical dots on the right side of the goal and click edit.
16. Once complete, select Send to Employee at the bottom of the page.

Supervisor/Manager Helpful Hints:

- An Asterisk (*) next to the title of a field indicates that it is a required field.
- Throughout the year, the employee and manager may update the goals with notes, status and percentage complete information on the goals.
- Focus Reviews are a great time to discuss the status of employee goals and update the goals in the system.

Employee:

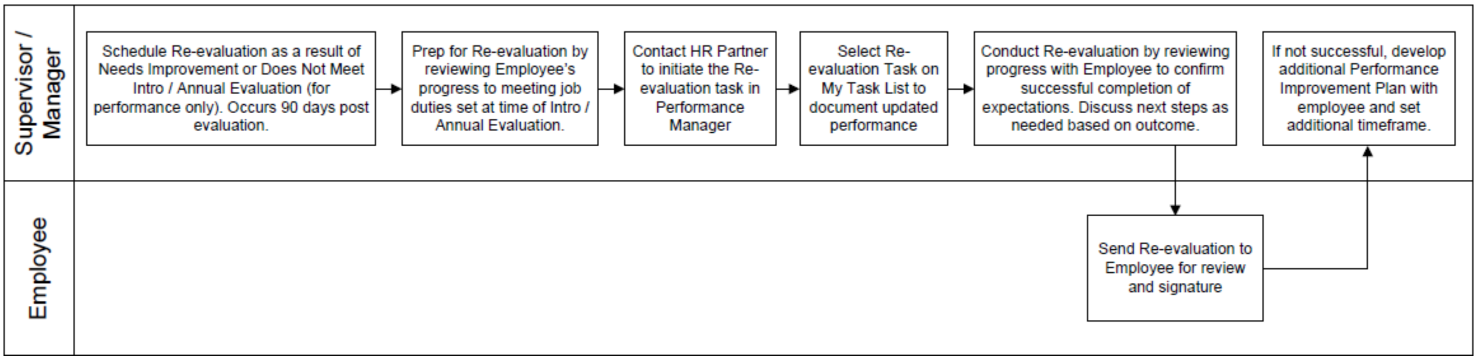
Acknowledging and Adding Goals:

1. On My Task List select Goals task under the Review Approved Goals.
2. You can now review all of the goals discussed with your Manager.
3. Your comments can be added by clicking the Show Notes. (Type in any comments and select Add Note at the bottom right of the box.)
4. If there are goals missing, you need to contact your Manager to have them added. (Any additional goals will be completed in a separate process of acknowledgement.)
5. Select Acknowledge at the bottom of the page

Employee Helpful Hints:

- Throughout the year, the employee and manager may update the goals with notes, status and percentage complete information on the goals.
- Focus Reviews are a great time to discuss the status of employee goals and update the goals in the system.

Re-Evaluation: Introductory & Annual



Supervisor/Manager:

When a Re-Evaluation is necessary:

1. If an employee receives a merit rating below a MEETS, you must schedule a Re-Evaluation.
2. In order to initiate this process, you should contact your Human Resources Partner.
3. Once the Human Resources Partner has completed the setup process, you will receive an email notification that a new task has been assigned.
4. You should meet with your employee to discuss the re-evaluation at the time interval discussed with the HR Partner.
5. On My Task List select the Re-Evaluation task.
6. Complete the Re-Evaluation form and select Save and Send.
7. Once the Employee has acknowledged the Re-Evaluation, a task will appear on your Task list.
8. Select Re-Evaluation task on My Task List.
9. Review any comments that your employee has included.
10. At the bottom, select Sign to complete the process.

Employee:

When a Re-evaluation is necessary:

1. After you meet with your manager to discuss your Re-Evaluation, a copy will be sent electronically for you to acknowledge.
2. You will receive an email notification that you have a new task.
3. On My Task List, select Review Re-Evaluation.
4. Enter any additional Comments in the Comments box at the bottom.
5. Review and acknowledge the Re-Evaluation by Clicking Sign at the bottom of the document.

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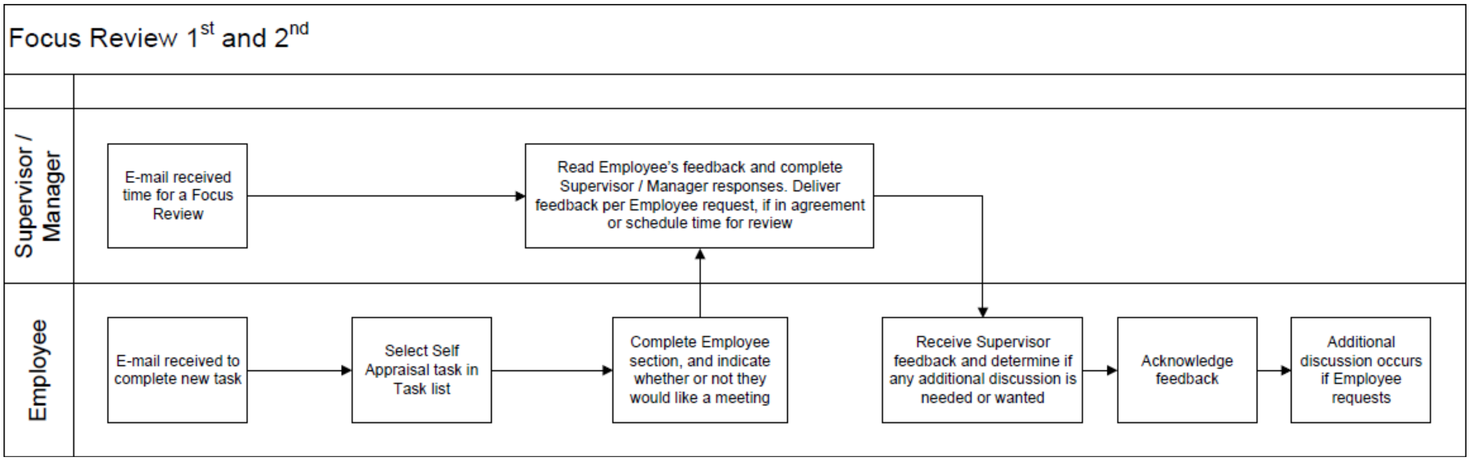
Focus Review – 1 and 2



<u>Employee:</u>

Complete Focus Review:

1. You will receive an email notification that a new task has been assigned.
2. On My Task List in Performance Manager, select Self Appraisal. This is your task for the Focus Review.
3. Complete the Focus Review Progress section by providing your comments on progress toward your goals and any barriers/issues/needs you have encountered.
4. Click the Employee Comment radio buttons for each question and add comments. Comments are required on each item.
5. You may add any career or development goals and if you have any areas that you would like to discuss with your leader in the Appraisal Comments section toward the bottom of the document.
6. Click Save and Send. Your manager will receive notification that you have done your task and will now be able to complete their steps.
7. After your manager has completed their task in this process, you will receive an email notification that a new task has been assigned.
8. Select Review Appraisal on your My Task List in Performance Manager and review your manager's comments and Initial Assessment. If you do not need a discussion on comments, click Sign. You may add additional comments if you desire.
9. If would like to meet with your manager to discuss goal progress, career development or any comments provided, please schedule a meeting to with your manager.
10. Once you are comfortable with the document, click Sign.

Employee Helpful Hint:

- You may start your Focus Review at any time after receiving the Self Eval task. You may save your comments by clicking the Save disk icon on the right side of the screen and return to complete your review at a later time.
- Meetings are not required for Focus Reviews; however they are strongly encouraged. If you have questions on the feedback or would like to discuss career development goals, you can request a meeting with your manager.

Supervisor/Manager:

You will receive the task for the Focus Review but you must wait until the employee has completed their steps.

Complete Focus Review:

1. You will receive an email notification that your employee has completed their steps in this process.
2. On My Task List, click the Focus Review task for the Employee.
3. Check Manager Appraisal box and click Continue.
4. The Focus Review form will appear with the employee's comments for your review.
5. Add your comments in the Manager's Initial Assessment section by clicking Manager Comments. If you have no additional comments to include, click No Comment.
6. Comments can be added to reinforce and support employee comments or share a different perspective by clicking Manager Comments for the appropriate section and entering comments.
7. Once completed, click Save and Send.
8. After the employee completes their review and signs-off, you will receive an e-mail confirming completion of the process.

Supervisor/Manager Helpful Hint:

- A green "down" arrow next to a Task means there is more than one task for completion under that category. Click to expand.
- You can save your work at any time and return at a later time to complete the assessment.
- You are not required to meet with your employee for the Focus Review, but it is strongly encouraged for employees who require performance correction, are not meeting expectations and individuals who are high performers and you want to retain.

Updating Progress on Goals

Supervisor/Manager:

To Update Progress on Goals:

1. On My Task List, select Employee List from the Employee drop-down.
2. Select Goals in the View drop-down for the employee.
3. Select the goal you wish to update.
4. Click on the 3 vertical dots on the right side of the goal and select Edit.
5. Update goal as required.
6. Click on Save.

Supervisor/Manager Helpful Hint:

- Progress on Goals can only be updated prior to the employee's annual evaluation. If the same goal is required for the following year, you must create a new goal.

Employee:

To Update Status of Goals:

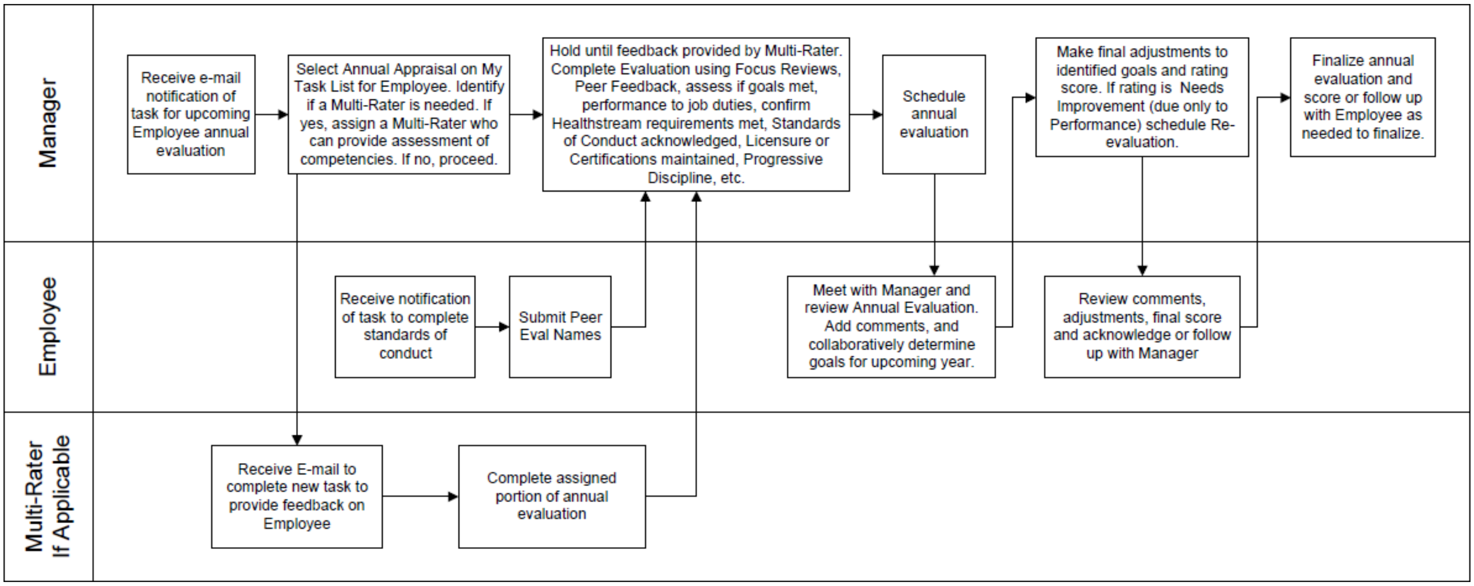
1. Under My Folder, select Goals.
2. Click on the Goals under Title.
3. All goals will appear.
4. Click the Show Notes in blue to add accomplishments and review previous notes.
5. Click Add Note at the bottom of the box.
6. Select up/down arrow to update Percent Complete.
7. Click on Save.

Updating Next Annual Evaluation Date in Ultipro

Supervisor/Manager:

1. This process is required to be performed each year after the Annual Evaluation.
2. Log in to Ultipro.
    - Dates can only be updated in Ultipro once the Annual Evaluation has been completed and signed by both the leader and employee.
3. Select the My Team tab and My Employees.
4. In the Role drop down box underneath the My Employees heading select Reviewer.
5. In the Find By section, the first drop down box defaults to Last
6. Enter the last name of the individual you are updating.
    - You can also use the first two sections of Find By to enter other search criteria in order to find the employee.
7. Click on the Employee you are updating.
    - Please note – be sure to click on the Active record.
8. A Review History box will appear.
9. It will include any prior year evaluation results or will appear blank for new employees.
10. Click the green Add button to add the newest evaluation information.
11. An Add Review box appears with previous year information in the first column and blank fields for your new entry.
12. Enter Data into the Current Review column for both Salary and Performance sections.
13. Press Save in top right corner to save the information entered.
14. This information will be uploaded into Performance Manager on a weekly basis.
15. Once the data is updated in Performance Manager, a Performance Goals Task will be assigned for you to complete entry of the employee's next year's goal.

Annual Evaluation



<u>Supervisor/Manager:</u>

If employee requires their job competencies to be assessed by a similarly licensed individual, complete the Multi-Rater process prior to starting the evaluation.

1. You will receive an email notification that a new task has been assigned. Prior to beginning the Annual Appraisal:
    - Initiate the Peer Feedback process. (See Peer Review workflow and instructions).
    - If the employee you are reviewing holds a license which must be evaluated by another individual holding that same license, initiate the Multi-Rater processes (see instructions below).
2. If you have requested Peer Feedback:
    - You may track the status of the task by selecting the Peer Evaluation / 360 task in your task list. The task will contain a chart and a list showing the status of the evaluations.
3. If you have requested Multi-Rater feedback:
    - You may track the status of Multi-Rater process by selecting the arrow on the left side of the Annual Appraisal task. If this arrow is green, the multi-rater process is not complete.
4. Once Peer Feedback and Multi-rater (if applicable) input is received, continue the process in Performance Manager.
5. Click on Annual Appraisal for the employee you are reviewing.
6. Check Manager Appraisal, and click Continue.
7. Review feedback from Focus Reviews, Peer Evaluations and Multi-rater (if applicable). In each Section of the Annual Appraisal you will need to click a radio button for each item.
    - Click on the “dialog box” icon at the end of each item to add Comments on the item.
        1. For each Behavioral Standard and items in Essential functions rated Unsatisfactory or Highly Effective comments are REQUIRED. You should provide at least 2 examples of direct observed behavior that supports a Unsatisfactory or Highly Effective rating.
    - Although Multi-rater scores and comments will be automatically included in the appraisal, you will have to transfer the values to each of the individual question on the forms.

How to Select a Multi-Rater:

1. On My Task list, select the Annual Evaluation task for the employee being reviewed.
2. Click the Multi-Rater Appraisal checkbox which is the bottom option and click Continue. Note: Feedback from Providers must be done outside of Performance Manager.
3. A box will appear for you to search for the individual the review should be assigned to.
4. Enter the Due Date you wish to have the information returned to you.
5. Enter the name of the manager who will assess the competencies as a Multi-Rater in the Employee box. You can search by first or last name and all related individuals will appear.
6. In the Choice section at the left, click the box next to the manager's name you wish to assess the competencies.
7. Click Assign. The Manager completing the Multi-Rater process will receive a task to complete a multi-rater appraisal.
8. To verify the Multi-Rater has completed their task, select the icon to the left side of the Annual Evaluation task. The status of the Multi-rater will display.
9. If completed, return to the Annual Appraisal workflow.

Supervisor/Manager Helpful Hint:

- Peer Feedback is a requirement by Magnet for all Nursing positions and strongly recommended for all employees.
- Once an evaluation has been signed by both leader and employee it cannot be re-opened. If changes need to be made, please contact your HR Partner.
- Employees with specific license, registry or certification requirements must have their job required competencies assessed by an individual with the same educational background, experience, or knowledge related to the skills being reviewed. For example: a Registered Nurse who reports to a non-licensed individual must have their clinical competencies evaluated by another individual who holds an RN license. In this situation, a Multi-Rater is identified to provide that assessment.
- The Multi-Rater's comments and score will display in the Employee's evaluation document; however, the scores will need to be re-entered by the Manager in order for the Essential Function score to be calculated properly.

Employee:

If you are required to or would like to have Peer Evaluations, review the Peer Review (360 Process) section

1. You will receive an email notification that a new task has been assigned.
2. Prior to your Appraisal Review meeting, you need to complete the Annual Standards of Conduct.
   - Select the Standards of Conduct task in the My Task List.
   - Review the Standards of Conduct document and acknowledge the document.
   - If you choose to not acknowledge the document, contact your manager.
3. Meet with your manager to review your Annual Appraisal and set goals for the upcoming year.
4. Following your meeting and after your manager has completed the Annual Appraisal form, you will receive an email indicating a new task assigned for you.
5. In Performance Manager, select Review Annual Appraisal and review the documentation submitted by your manager.
6. Include any comments on your Annual Appraisal in the Signature Comments Section.
7. Click Sign. Your manager will be notified you have submitted your comments on the Annual Appraisal.

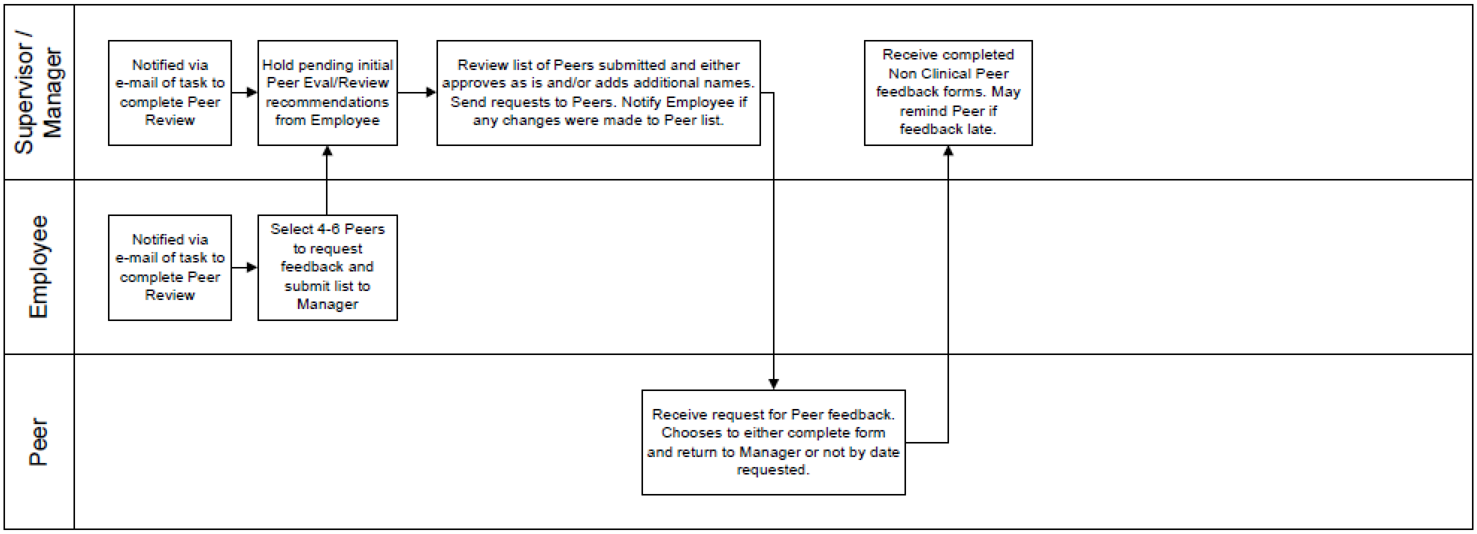
Employee Helpful Hint:

- Send Peer Evaluations as early as possible to ensure you receive peer input prior to your Annual Appraisal.

Multi-Rater:

1. On the My Task list, select the Multi-Rater Appraisal task for the employee you are being requested to evaluate.
2. Select "Yes" to continue to the appraisal.
3. Complete the evaluation by responding to each statement in the Population Served and Essential Functions sections.
   - Add comments if needed by clicking the comment icon at the end of each statement.
   - Unsatisfactory or Highly Effective responses require a comment.
4. After completing all responses, select Save and Send at the bottom of the page.
5. If you left any question incomplete, a message will display requiring you to return to complete all questions that are highlighted.
6. Once fully complete, select Save and Send and the evaluation will be returned to the Manager. You will return to the main Performance Manager screen.

Peer Review (360 Process)



Employee:

Complete Peer Review (360 Process):

1. You will receive an e-mail notification that you have a new task.
2. On My Task List, select Peer Review task to begin the process of selecting peers to provide input. *For guidance on how to select Peers, please see the How-To section in the back.*
3. Click Add tab under Reviewer Suggestions and a pop-up box will appear.
4. Search for individuals by name and the employees matching that will appear below the Search Results.
5. Click on the individual that you wish to add and they will appear in the right column under Selections.
6. Once all names have been selected, click Done.
7. When the list is complete, click Submit For Approval.
8. An "Are you sure" pop-up box will appear – click OK.

Employee Helpful Hint:

- If you forget someone, simply go back to the Add button below Reviewer Suggestions and add that individual.
- Send Peer Evaluations as early as possible to ensure you receive peer input prior to your Annual Appraisal.
- Peer evaluations from Providers cannot be requested through Performance Manager and must be done via email and/or discussion.
- Peer Evaluations are fully transparent to the employee being reviewed.

Supervisor/Manager:

Complete Peer Review (360 Process):

1. You will receive an e-mail notification that a new task has been assigned.
2. After your employee has completed selecting the list of proposed Peer Reviewer, On My Task List select the Peer Review task for the Employee.
3. The Employee's suggestions will appear first. Manager can choose to use all of the Employee's suggestions or only some of the suggestions.
4. Suggestions must be confirmed by either clicking the Add All Suggestions bottom or by click on the + in the Actions column for each individual to be confirmed.
5. All selections will now show in the Facilitator's Selections box.
6. Additional selections can be added using the Add button and the same process as completed below by employees.
7. Once the list is finalized, click Approve and Send Tasks button.
8. An "Are you sure" box will appear for you to confirm your Selections.
9. Click OK and the tasks will now be created and sent to the individuals who were selected to provide feedback.

After you have sent the request for peer reviews, a task to monitor the status of the peer reviews will be in your task list. Select this task to track the status of the peer reviews. When you have determined enough of the reviews have been completed and returned, continue with the next step.

10. Open the Peer Review task and select Close Review
11. The completed peer reviews can be viewed in the employee's Appraisals 360 folder.

Supervisor/Manager Helpful Hint:

- Peer Reviews are completed in the 360 Process within Performance Manager. Individualized feedback forms are automatically selected based on the role of the Employee being evaluated. Peer Reviews are not mandatory and recipients can opt out.

How to Select Peer Reviewers:

- Feedback is an important and necessary part of everyone's career development and selecting individuals to participate in the process is equally as important.
- Peer Reviewers should be selected based on the following criteria:
    - They should have a working relationship with the employee being reviewed.
    - They should know the employee's work and have frequent interactions.
    - Their ability to provide balanced feedback on both areas of strength and opportunities.
- Avoid Peers that are known only through casual interactions, brief meetings, or a one-time, short-term project or presentation.
- Include a balanced set of Peers that can provide objective feedback.
- The Employee and Manager should collaborate on the identification of Peer Reviewers.
- The Peer Review submission is given to the Employee during the annual performance evaluation and is not anonymous.
- A Peer may decline to provide information if they have not had sufficient interaction with the participant during the year.
- Approximately 4-6 Peers should be selected to provide input into the evaluation.

Peer Reviewer

1. You will receive an e-mail notification that a new task has been assigned.
2. On My Task List select the Peer Review task for the Employee.
3. If you agree to perform a peer review for this employee, select Yes. If you select No, you have no additional steps in this process.
4. Complete the review by selecting scores and providing comments as applicable.
5. When you have completed, select Save and Send.

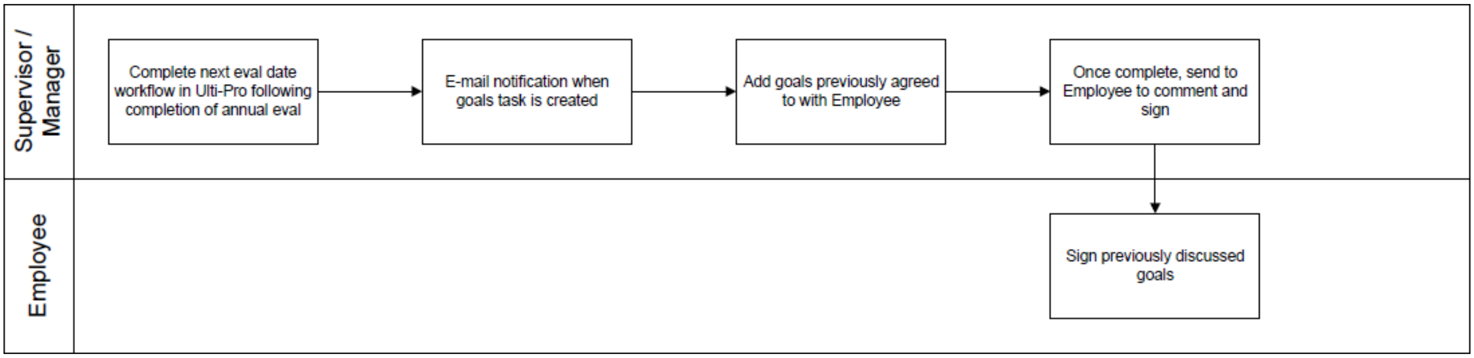
How to Provide Peer Feedback

- Feedback from managers, peers, and direct reports is critical to identifying performance strengths and areas for improvement. It provides employees opportunities for growth and education in their roles and it often results in improved communication and better understanding of expectations between employees and departments.

- If you have been asked to provide feedback on a peer, please keep in mind the following:
  - The Peer Feedback form is automatically assigned based on the role of the individual being evaluated. Clinical staff receive a clinical form; leadership the leadership form and a general Peer Feedback form to all others.
  - Providing peer feedback is optional and if you have not had sufficient opportunity to work with or interact with the employee in the previous 12 months, you should not provide feedback. If this is the case, please communicate with the Employee's Manager.
  - Make your feedback straightforward and honest and provide examples that illustrate your points.
  - Comments are required for Needs Improvement or Exceeds selections.
  - Feedback is transparent – the employee will know the individuals who provided it.
  - Use the experience as a chance to think about your own contributions and behaviors.

- If you offer effective, thoughtful feedback with examples so that the manager can share the feedback with your coworker, you present an opportunity for the employee to grow.

Adding Goals



Supervisor/Manager:

1. Once you have completed the Next Evaluation Date process in Ultipro (see Changing Next Eval Date in Ulti workflow) and the Performance Manager system has received that information, you will receive an e-mail notification that a Task for Goals has been created.
2. On My Task List, select Goals task
3. On the Individual Goals page, select the Actions drop down on the right side of the page
4. Select Add Goal
5. Add a goal pop-up box will appear
6. **Title*** - Name of the goal being created
7. **Description** – if you wish to include specific action items or more details about expected outcomes, please include them here.
8. **Align To*** - this drop down highlights the organizational pillars to which Goals should align.
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14. Continue adding goals using the above process until complete
15. To Edit any of the previously created goals, select the 3 vertical dots on the right side of the goal and click edit.
16. Once complete, select Send to Employee at the bottom of the page.

Supervisor/Manager Helpful Hint:

- An * next to the title of a form indicates a required field.
- All employees must have at least one goal in Performance Manager. If your employee does not have any specific defined goals, please use “Employee Has No Defined Goals” as the name of the employee’s goal.

Employee:

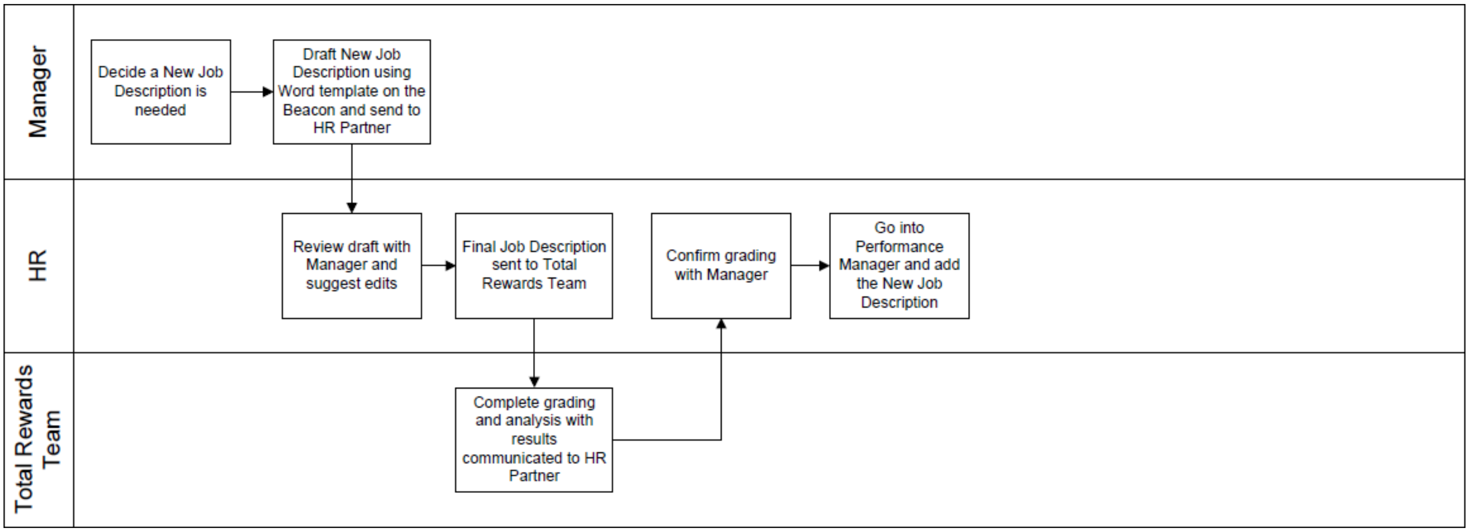
Acknowledging and Adding Goals:

1. On My Task List select the Goals task under Review Approved Goals.
2. Your comments can be added by clicking the Show Notes. (Type in any comments and select Add Note at the bottom right of the box.
3. If there are goals missing, you need to contact your Manager to have them added. (Any additional goals will be completed in a separate process of acknowledgement.)
4. Select Acknowledge at the bottom of the page.

Employee Helpful Hint:

- An asterisk (*) next to the title of a form indicates a required field.

Creating New Job Descriptions



<u>Supervisor/Manager:</u>

1. Begin the process by opening the New Job Description Template (Word) from the Performance Manager page on The Beacon.
    - The template is in the same format as a Job Description in Performance Manager.
2. Enter a summary of the position you are creating in the Job Summary section.
3. Include all required experience, training, special skills and licensure as well as preferred / desired levels in the Specifications Section.
4. In the Work Environment section, include:
    - Physical Activity Levels – replace XX with actual % of the day.
    - Sensory Requirements –highlight the requirements for each item.
    - Functional Demands – highlight the requirements that most align with this job.
    - Usual Workday hours – Include typical shift lengths. Is this a 12 hour shift or an 8 hour or other.
5. Population Served – highlight all of the ages that apply to this job.
6. Essential Functions – please include all Essential Functions as well as Elements of Performance that should be included in the job description.
7. Once complete, save the document and send it electronically to your HR Business Partner for review.

Helpful Hint:

- Allow a 2 week turnaround for new job descriptions to be added to PM after sending them to your HR Partner.

Human Resources:

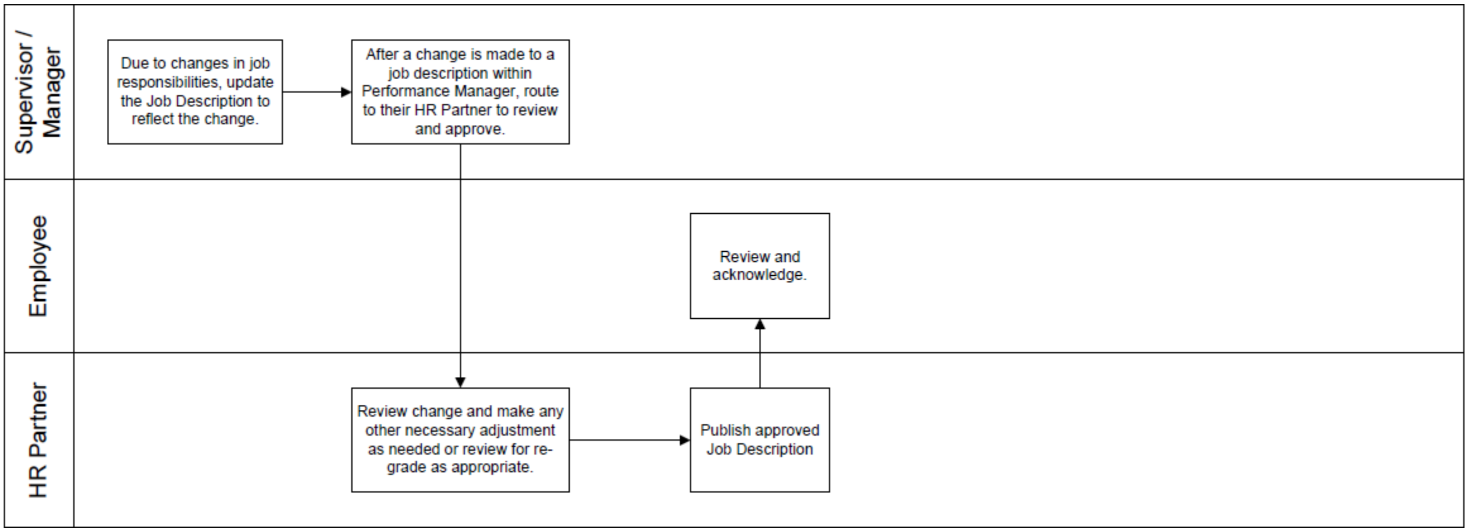
Create New Job Description
Your HR Business Partner will guide you through all remaining steps.

Employee:

New job descriptions must be initiated by your Manager.

1. After a new job description is completed, you will receive an e-mail notification that a task has been created.
2. Access your Task List in Performance Manager and click on the task to Review Job Description.
3. Review your job description and click the Sign button at the bottom of the page.

Job Description Updates



<u>Supervisor/Manager:</u>

Updating a Job Description:

1. In Performance Manager, select Job Description title in the Search bar.
2. Click on appropriate job title in the list that appears.
3. Scroll up or down to the section that you wish to update.

- **To Add New Information:**
  a) Hover your mouse on the section title (blue bar) where you wish to add information and right click.
  b) Select Add Item.
  c) Enter the information in the text box and click Add Item in the upper right corner.
- **To Edit/Update Existing Information:**
  a) Hover your mouse over the line you wish to edit and right click.
  b) Select Edit Item.
  c) Make edits in the text box.
  d) Click Save Item in the upper right hand corner.
- **To Add a New Essential Function:**
  a) Hover your mouse on the Essential Functions section title (blue bar).
  b) Select Add Item.
  c) Enter the new Essential Function in the text box.
  d) Select "number" under Bullet Type.
  e) Leave the evaluation score section blank.
  f) Click Add Item in the upper right corner.
- **To Add an Element of Performance to an existing Essential Function:**
  a) Hover your mouse over the Essential Function to which you wish to add an Element of Performance and right click.
  b) Select Add Item.
  c) Enter the new element of Performance in the text box.
  d) Select "lowercase letter" under Bullet Type.
  e) Select Essential Functions under Evaluation List in the Evaluation Scores section.
  f) Click Add Item in the upper right hand corner.

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Supervisor/Manager (Cont.):

4. Scroll to the bottom of the template and select the appropriate HR Partner from the drop down list to route the updated Job Description to.
5. Click Route.
6. Your HR Partner will review your changes and will publish the new job description within one week.
7. All employees who are in the job description will receive a Task to go into Performance Manager and review and sign-off on the updated Job Description.

Supervisor/Manager Helpful Hint:

- Each time you add an item or edit an item, the screen will automatically refresh to show you your change.
- Prior to sending the updated Job Description to your HR partner to review and publish, share with your employee(s) the planned changes to the Job Description so they are aware.

Employee:

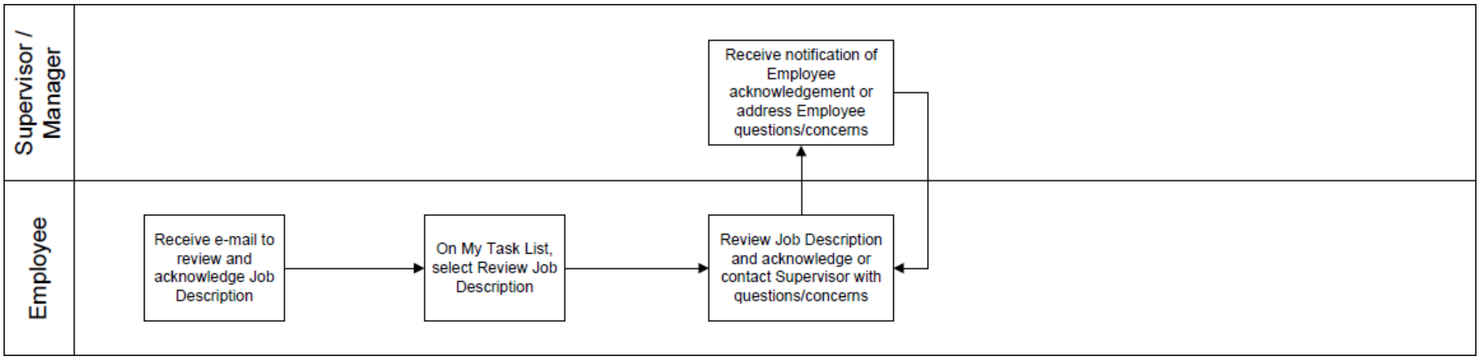
Only Supervisors/Managers are able to update a job description.

Human Resources:

Updating a Job Description:

1. Discuss job description changes with Manager to understand if they are significant enough to warrant a market review by Compensation.
2. Once Complete, access Performance Manager and open the task to review the job description.
3. Ensure format is correct and information is accurate (example: Transporter position with a Sedentary Functional Demand is incorrect. RN with no Population Served section is incorrect).
4. Scroll to the bottom of the page and click Publish.
5. Answer “All” to next question on who you want to be notified.
6. The process is now complete.

Job Description Sign-off



Supervisor/Manager:

Content specific to this topic does not apply to supervisors/managers.

Supervisor/Manager Helpful Hint:

- You will receive an e-mail notification that your employee has signed off on the updated job description.

Employee:

Complete Job Description Sigh-off:

1. On My Task List in Performance Manager, select Review Job Description.
2. Read the job description in its entirety.
3. At the bottom of the job description, click Sign.
4. If you have questions on your job description, please speak with your manager prior top selecting Sign.

Employee Helpful Hint:

- You will receive an e-mail notification that your manager has made changes to your job description and you must sign off on your Job Description.

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Helpful Hints

How to View, Print, and Upload Documents

Supervisor/Manager

View/Print a Document

1. On My Task List, enter the employee's name in the Employee Search box at the top right of the page.
2. Click on the employee's name. This will open an information page for the employee.
3. At the top of the page, select Documents.
4. Select either Signed Documents (system generated) or Miscellaneous Documents (uploaded).
5. Click on the document you wish to view.
6. If the document is an Adobe PDF it will display on the page.
7. Scroll using the navigation bars at the right and bottom of the screen.
8. To Print, move the cursor over the document and a tool bar will appear. Select the Printer Icon.
9. For other document formats:

- You will be asked if you want to open the document. Select OPEN. The document will open in an application aligned with the file type.
- To Print – follow the process for that application's printing process.

Employee

View/Print a Document

1. Select My Folder at the top of the page and select Documents.
2. Select either Signed Documents (system generated) or Miscellaneous Documents (uploaded).
3. Click on the document you wish to view. The document is an Adobe PDF; it will display on the page.
4. Scroll using the navigation bars at the right and bottom of the screen.
5. To Print, move the cursor over the document and a tool bar will appear. Select the Printer Icon.
6. For other document formats you will be asked if you want to open the document. Select OPEN.
7. The document will open in the application aligned with the file type.
8. To Print – follow the process for that application's printing process.

Supervisor/Managers and Employees

Upload a Document

1. On the My Task List page, enter the employee's name in the Employee Search box at the top right on the page.
2. Click on the employee name you are searching for. This will open an information page for that employee.
3. At the top of the page, select Documents.
4. Select Add Document.
5. Using the browse button, find the document you wish to upload from your computer and select OPEN.
6. Select SAVE DOCUMENT.

Helpful Hint:

- The document may take a few minutes to appear on the Miscellaneous Documents list.

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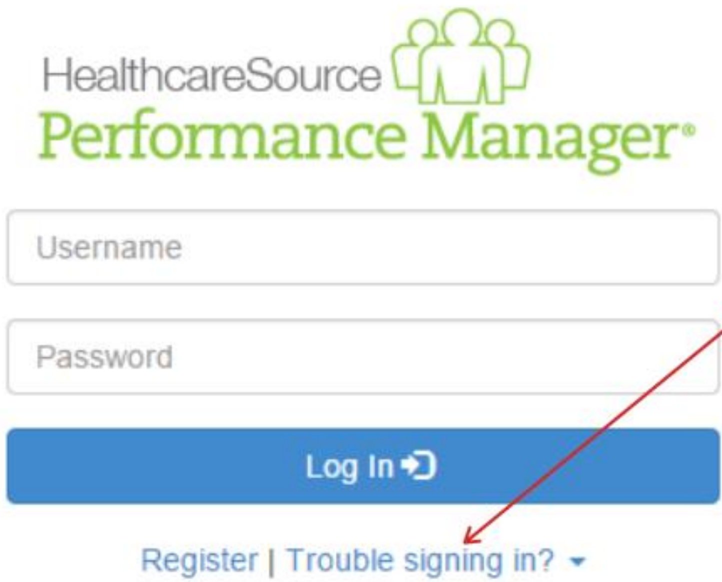
Additional Helpful Hints

- My Task List will contain all the tasks assigned to you. You can filter by type of task.
- The orange alert box in the upper right of your home screen will show you the tasks assigned to your direct reports.
- Some tasks will need to be processed by an overnight job and will not be available immediately.
- A green "down" arrow next to a Task means there is more than one task for completion under that category. Click to expand.
- Click the Comments Icon: to add comments to any line where it appears.
- The More Information Icon: Indicates more information or tasks exist for this individual. Click to drop down and view all additional tasks.
- If a task is not completed by the task due date, emails reminders will be sent to the employee assigned to the task and that employee's manager.
- Reminders will be e-mailed at predefined intervals following a due date for all incomplete Tasks.
- Hovering your mouse over specific pieces of information will reveal additional information which may be helpful.
- All tasks are initiated by the manager except for Focus Reviews and Peer Reviews
- Use goals as a discussion point in the Focus Reviews as well as the Annual Review !
- To view changes to a job descriptions, select Highlight Changes On
- Comment boxes are available in almost every section of the process. Use Them !
- The Performance Manager project-team has created a method for the Admin Assists to receive email notifications for their manager's tasks in PM.   Documentation about this process is available by sending a request to PerformanceManager.Support email.

Resetting Password



Resetting Your Password

- Click here to answer your security questions and reset your password. If you do not remember your security questions, please contact the HelpDesk and they will reset your password.

How to Request Help

Need Someone to Show you?

Subject Matter Experts are available for telephone and At-The-Elbow consultation.
A listing of all Subject Matter Experts can be found on The Beacon under Employee Resources and Careers

Support Via E-mail?:

Support via Email? Questions can be submitted to the *PerformanceManager_support* e-mail. Responses will be received within 48 hours.

On The Beacon:

Additional system tools, process guides and other forms can be found on The Beacon/Employee Resources/Careers

Managers' How To

This section will describe how to review employee information in Performance Manager (PM). In PM, Supervisors and Managers have the ability to see all information for their direct and indirect reporting staff. For information about employees who do not report to you, please contact your HR Partner.

How to review an employee's current task list

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list.

How to review an employee's Job Description

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list.
4. Near the top of the page, select the Job Description tab by clicking on it.
5. A list of all previously acknowledged job descriptions will display. Job descriptions are in descending date order.
6. Click on the required job description.

How to confirm an employee has acknowledged their Standards of Conduct

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list .
4. Near the top of the page, select the Documents task by clicking on it.
5. Select the Signed Documents tab by clicking on it.
6. A list of all the employee's signed documents will display.
7. Confirm the Standards of Conduct was completed and acknowledged.

How to confirm an employee has acknowledged their Employee Handbook

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list .
4. Near the top of the page, select the Documents task by clicking on it.
5. Select the Signed Documents tab by clicking on it.
6. A list of all the employee's signed documents will display.
7. Confirm the Employee Handbook was completed and acknowledged.

Managers' How To (cont)

How to review a completed Appraisal

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list.
4. Near the top of the page, select the Appraisal Tab by clicking on it.
5. Select the Appraisals Tab by clicking on it.
6. A list of all the employee's completed Annual Appraisals will display.
7. Click on the required Appraisal.

How to review a completed 360/Peer Evaluations

1. In the Employee Search box at the top right of all PM pages, type the employee's name. The system will start displaying the employees that fit the criteria as you type.
2. Select the employee for whom you are searching by clicking on their name.
3. PM will display the employee's current task list .
4. Near the top of the page, select the Appraisal Tab by clicking on it.
5. Select the 360 Reviews Tab by clicking on it.
6. A list of all the employee's completed Peer Reviews will display.
7. Click on the required Peer Review.

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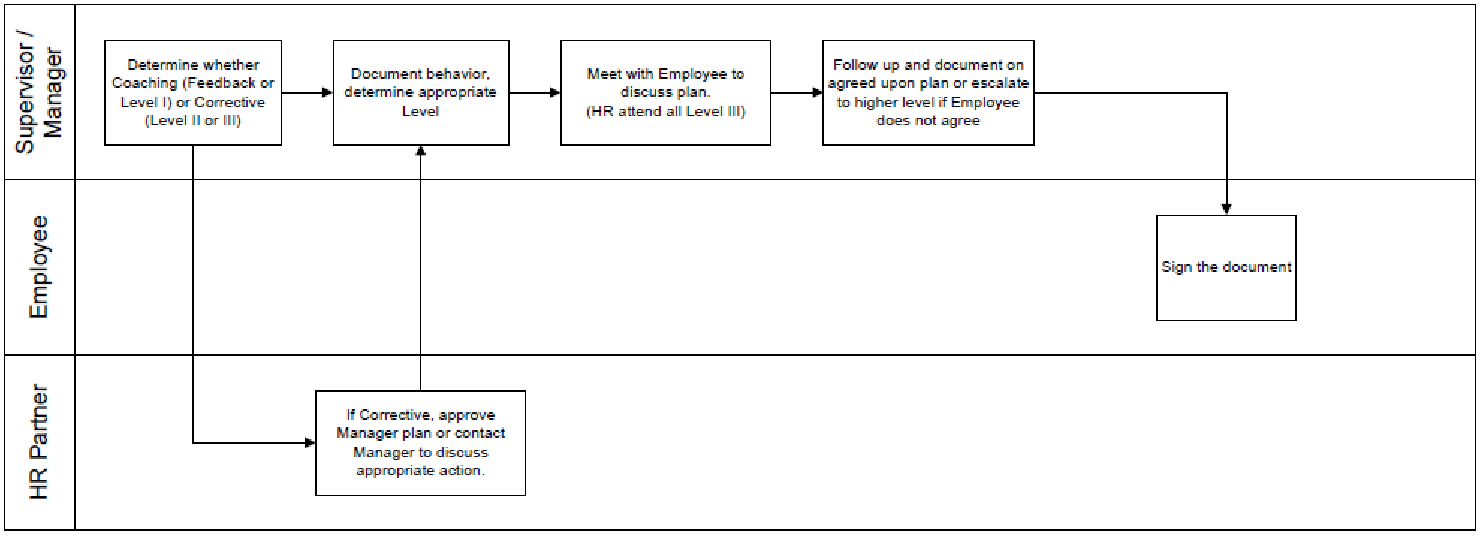
Coaching and Progressive Discipline

Documenting Progressive Discipline



Supervisor/Manager:

When It Becomes Necessary to Coach or initiate Progressive Discipline

1. Select the Employees tab and then Employee List in the drop down.
2. A listing of your employees will appear.
3. Click on the Add button for the identified Employee. In the drop down select Feedback and a Feedback template will appear.
4. Information should be added as follows:

   Date of Occurrence
   Include date if related to an event on a specific day. If documenting behavior which occurred over a period of time, simply click "Not Applicable."
   Type
   - Positive – to document outstanding contributions on daily work or projects.
   - Coaching – to document Feedback and Level I discussions.
   - Corrective – to document Level II and Level III discussions.

   Notification
   Select in-person discussion from the drop down. In-person meetings are required.
   Title
   Options will depend on Type selected above.

5. Coaching - select either Feedback or Level 1.
   - Corrective - select either Level II or Level III (both require review with HR Partner & Level III requires their attendance).
6. Suggested text is available for the Situation, Action & Expected Result sections by clicking on the Suggested Text to the left of each box.
   - The suggested text from the pop-up box can be added and then must be updated with specific information for the situation at hand.

7. Date Discussed with Employee and Due Date fields:
   - Date Discussed with Employee cannot be future dated and can be updated prior to final signatures.
   - Due Date is the first follow-up discussion with the Employee once a Progressive Discipline has been issued.
8. Click Save to save document pending discussion.
9. Print the Document for discussion.
10. Update the Feedback document following the discussion (using instructions outlined above) and click Save and Send at the bottom to route the document.
    - Coaching & Feedback and Level I Progressive Discipline will route directly to the Employee.
    - Level II and III Progressive Discipline must be reviewed by your Human Resources Partner prior to discussion with the Employee.
        i. A drop down will appear for Level II and III asking you to select the name of your HR Partner.
11. Once completed, the document is routed to the Employee for review and signature.
12. You will receive an e-mail notification when once complete.
    Please contact your HR Partner in the event an Employee refuses to sign the document.
    - In My Task List, select the Feedback Task related to the Employee discussion just completed.
13. Review any comments added by Employee at the bottom.
14. When you are finished reviewing the Employee's comments, select Sign at the bottom of the page.

Supervisor/Manager Helpful Hints:

- Coaching & Feedback and Progressive Discipline documentation is all completed as Feedback in Performance Manager.
- For Basic and Level I coaching, review by your HR Partner is not required, but is available. For Level II coaching, review by your HR Partner is required. For Level III coaching, your HR Partner must review the Level III document and must attend the coaching meeting.

Employee:

Acknowledging A Coaching or Progressive Discipline:

1. Following a discussion with your Manager you will receive a Task to review and Sign related documentation.
2. In My Task List select the Feedback Task related to the discussion with your Manager
3. The full document will appear for your review.
4. Once you have reviewed, you can include comments in the Signature section at the bottom of the page.
5. When finished, click Sign in the bottom right of the page.
6. This document has now been saved and can be reviewed from your documents at any time.

HR Partner:

Documenting Progressive Discipline

HR Partners only review and approve Corrective Discipline. Review and discussion of plan is completed through investigation (if necessary) and information gathering as well as in in alignment with Core Values and Just Culture principles.