

Team Member Guide

Performance Manager

Effective 9/8/2020

Contents

Getting Started	4
System requirements	4
New user registration	5
Interface Basics	8
Navigation areas	9
Help menu	9
Inline help	10
User menu	11
My Folder	13
Appraisals	14
Checklists	14
Compensation	14
Development	15
Documents	15
Feedback	17
Goals	19
Job Description	19
Personal Info	20
Personal Routing Users	20
Tasks	22
Training & Assessment	22
User and Help menus	23
Help menu	23
User menu	23
Tasks	25
About the Tasks page	25
Completing tasks	31
	32
Job Descriptions	33
Reviewing a Job Description	33
Performance Goals	35
Adding goals	35
Copying goals	37
Updating goals	38
More about Performance Goals	39

Check in tasks	39
Notes	40
Notifications	40
Weighting	41
Development Goals	43
About the Development Goal form	43
Completing Development Goals	44
Refuse to Sign	46
Appraisals	47
Completing a self appraisal	47
Completing a multi-rater appraisal	48
Reassigning Appraisals	50
Rejecting Appraisals	50
Recognition and Remarks	51
About the Recognition form	52
Anonymous Recognition	54
Batch Recognition	56
Requesting Recognition	57
Responding to Recognition requests	59
Sending Recognition	60
Viewing Recognition	62
Checklists	65
About the Checklists form	65
Completing skills	67
Self assessments	67
Completing a self assessment	68
Sign Off task	69
Refuse to Sign	69
Feedback	71
Refuse to Sign	73
Reviewing Feedback (employee)	74
Reviewing Feedback (routing user)	75
Document Sign Off	76
Signing off on Documents	76

Getting Started

Welcome to Performance Manager! Your company has chosen one of the most powerful, versatile, and easy-to-use performance management systems available for the healthcare industry today.

Before diving into Performance Manager, let's review system requirements and some basic concepts about general system use to help you understand system workflows, navigation, and functionality.

- [System requirements](#). Make sure you have the latest and greatest browsers so you're able to take full advantage of all the features and functionality we offer.
- [Interface basics](#). The navigation bar provides all the links and icons to features you need so you can locate information and get work done quickly.
- [New user registration](#). You'll need to register before you can log in, so start here. It's done in a few simple steps.

System requirements

At HealthcareSource, our goal is to provide the best possible user experience across the wide range of desktop and smart device browsers. To achieve this goal, we prioritize supporting browsers with the most advanced technology. Our solutions are designed to function with the browser versions we've identified in the chart below as **A-Grade** — we actively test on these browsers to optimize user experience.

HealthcareSource recognizes that some legacy browsers, which we've identified as **X-Grade**, don't provide the technology needed to deliver new features with a modern user experience. In order to continue providing the best solutions and support, we've decided to discontinue support for these X-Grade browsers.

In addition, there are browser versions for which we provide limited support, identified below as **C-Grade**. While we don't regularly test this set of browser versions, customers have found them to work well with our software. Problems reported with these versions may be addressed, but we cannot make specific commitments as to if or when a fix will be available. In some cases, we know of select features or functionality that don't work with these browsers. We do our best to document those cases and make this information available upon request.

By prioritizing A-Grade browsers and discontinuing the support of X-Grade browsers, HealthcareSource can release features more frequently, provide better support, and resolve issues faster. Since Microsoft stopped supporting Internet Explorer 8 in January 2016, we predict that most healthcare organizations will be migrating to newer browsers. However, there are limited options for those who decide to continue using these legacy browsers. For more information, contact support@healthcaresource.com.

Note: Customers requiring Microsoft IE 8 for legacy applications should consider Microsoft Internet Explorer Enterprise Mode.

Please check back with us if you have questions on browser support. We're constantly upgrading our solutions to make them more browser agnostic — this work is ongoing and incremental. We'll notify customers when browser support changes.

A-Grade	C-Grade	X-Grade
Optimal user experience	Adequate user experience	Not supported
HealthcareSource actively tests all A-Grade browsers and reported bugs are addressed with high priority.	HealthcareSource tests a sampling of C-Grade browsers periodically and reported bugs are addressed with high priority.	HealthcareSource doesn't test X-Grade browsers or address reported bugs. There may be limited user experience.
Microsoft Edge*	Microsoft IE 9	Microsoft IE 8 and below
Microsoft IE 11	Mozilla Firefox*	Microsoft IE 10
Google Chrome*		Browsers not listed are X-Grade
Apple Safari*		

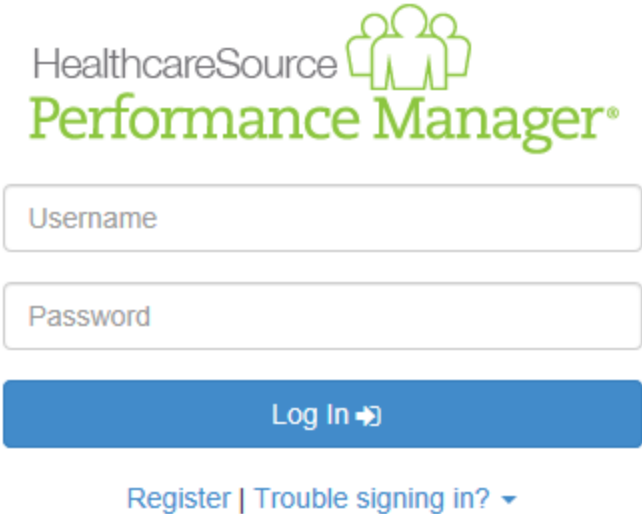
*Latest versions


New user registration

As with most software solutions these days, Performance Manager requires a username and password in order to log in and access the site. But what if you're a new user and don't have either of those things yet? No worries. A quick registration process is all that's needed for you to retrieve your username and create a password so you can log in and get stuff done.

Let's dive in, shall we?

- 1. Click the **Register** link on the main login page for Performance Manager.



HealthcareSource 
Performance Manager®

Username


Password

Log In ➔

[Register | Trouble signing in?](#) ▾

- 2. The page reloads and asks for your **First Name**, **Last Name**, and **Employee ID** number. Enter these into the text fields and click **Next**.



HealthcareSource 
Performance Manager™

Identity Verification (Step 1 of 4)

*First Name (proper)

*Last Name

*Employee ID

* indicates required field

Next

- 3. The next form asks for your **Username**. Make sure to enter a username that follows the guidelines set by your organization. Click **Next** when finished.

HealthcareSource 
Performance Manager™

Username (Step 2 of 4)

*Username

Username Rules:

- Usernames are case insensitive.
- Username should be a minimum of 8 characters and a maximum of 23 characters in length.

* indicates required field

4. Next up is the password. Enter a password for your account and confirm it, making sure to follow those guidelines again. Click **Next** when finished.

HealthcareSource 
Performance Manager™

Password (Step 3 of 4)

*New Password

*Re-type New Password

Password Rules :

- Passwords should not contain your Username, First Name, Last Name or Employee ID.
- Passwords should not be the same as any of the last three passwords used.
- Passwords should be a minimum of 6 characters and a maximum of 15 characters in length.
- Passwords should contain one of the following special characters: !@#\$%^&*()_+={}[]\|;:,.?
- Passwords should contain a number

* indicates required field

5. Last step is the security questions. Security questions are used to help you retrieve your username and/or password in the future if you should ever have trouble remembering. Three default questions are selected, but you can choose different ones from the drop-down lists. Make sure to select questions and provide answers that you can remember!

When you've completed all the necessary fields, click **Next** to complete the registration process.

HealthcareSource 
Performance Manager™

New Security Questions (Step 4 of 4)

Please select questions from the dropdown list.

*Question 1:

*Question 2:

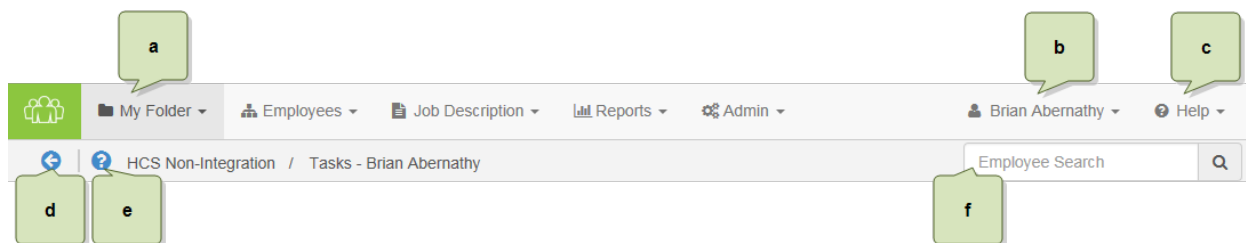
*Question 3:

* indicates required field


The page reloads again to display a message stating you have successfully registered. Nice job! You can now click the available **Login** button to return to the main login page and log in using the displayed username and password you just created.

Interface Basics

The navigation bar found at the top of the screen in Performance Manager contains all the links and icons for accessing the various areas and features of the system. From the drop-down menu items to the icons and breadcrumbs in the lower bar, this provides an easy way to get to the features you need.

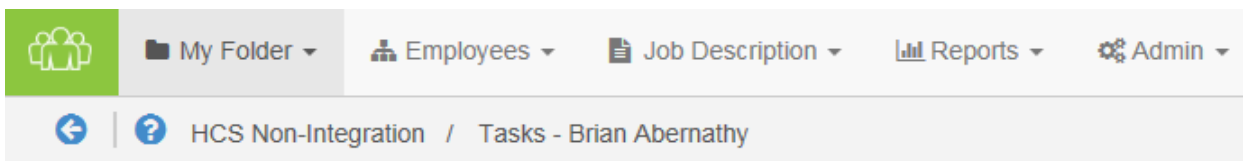


- a. [Available areas](#). The main items in the navigation bar allow you to access different features throughout Performance Manager. Access to these items are controlled by system-wide permission sets, so you may not see all the options listed here. In fact, most employees only have access to the **My Folder** item.

- b. [User menu](#). The user menu is the one that has your name on it - so hopefully it's pretty obvious which one we're referring to. This menu provides access to several *Settings* pages that control your account security and other system options, along with the system's **Log Out** link.
- c. [Help menu](#). The *Help* and *Release Notes* options under this menu item launch the online help system in a new browser window or tab. The selected option determines which page of the online help system is displayed once opened. Clicking the *Support* option takes you to the HealthcareSource Community Support portal.
- d. **Back button**. This button merely takes you back to the previous page you were viewing. We recommend using this button instead of your browser's Back button when navigating around Performance Manager.
- e. [Inline help](#). The  icon opens the inline help window for the page you're currently viewing. These windows provide smaller chunks of help material so you can get past those sticking points without having to dive into the full help system for answers.

Navigation areas

The main navigation bar has several menu items containing the various functionality for Performance Manager. Access to the items is controlled by system-wide permissions, so chances are you won't see all the items listed unless you're an administrator for the system.



- [My Folder](#). This is the one item that all users have. The pages under this area contain employee profile information and provide easy access to appraisals, checklists, feedback, and other items saved to your profile.


Help menu

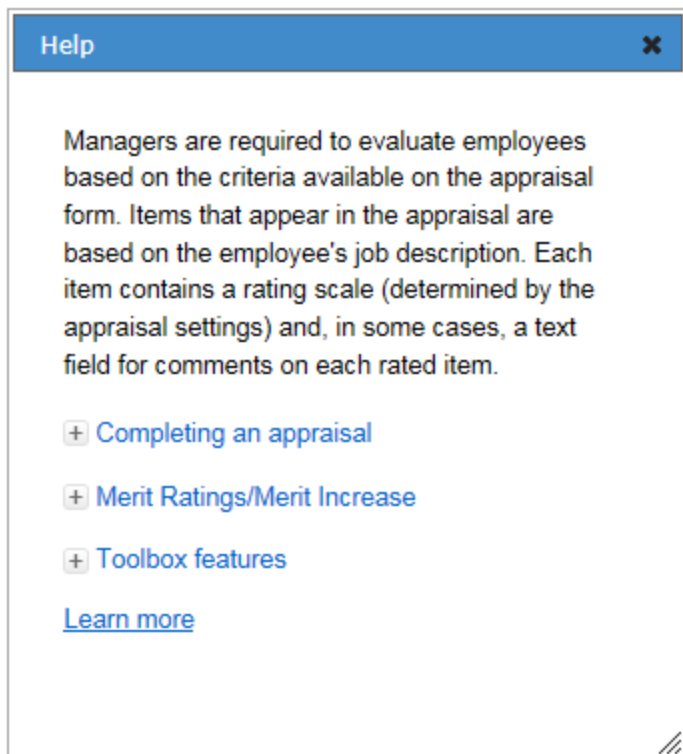
The Help menu in the navigation bar provides quick access to pages found in the online help system. Clicking any of the available links launches the online help system in a new browser window or tab and displays the topic for the selected option.

- [Help](#). Opens the help system to the home page, from which you can perform a search for topics, download user guides, or browse the available content.
- [Release Notes](#). Opens the help system to the Release Notes topic, which lists feature enhancements and bug fixes we've delivered over the given time periods.
- [Support](#). Takes you to the HealthcareSource Community Support portal, where you can search our knowledgebase of articles and submit support tickets.

Inline help

Inline help was created as a way to provide targeted bits of information that assist you in performing necessary tasks or functions within Performance Manager without having to dig through pages of information in online or printed user guides. Inline help delivers condensed chunks of user assistance that only relate to the page currently being viewed so you get the help you need now.

Clicking the  icon next to the breadcrumbs in the navigation bar opens a pop-up window within Performance Manager itself - not a new browser window or tab - so you can view necessary information about features or procedures without having to switch back and forth between multiple windows. Viewing assistance information in the same window as the feature you're trying to use makes it easier to get past those sticking points.



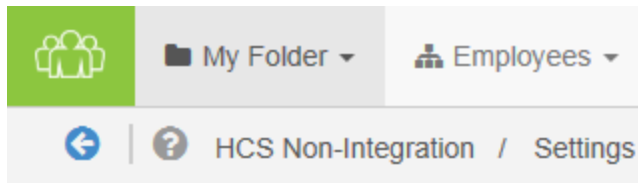
Another great thing about these inline help windows is that you can move them around the page and still interact with Performance Manager in the background. Open up an inline help window so you can see the steps necessary to complete your task, and click along in Performance Manager as you walk through the procedure. You can also resize the inline help window so it's never in the way.

Finally, if you're feeling particularly curious, clicking the **Learn More** link in the inline help window opens the full online help system for Performance Manager where you can view more detailed information about the feature(s) in question and all other areas of the system.

User menu

The user menu provides access to several settings pages that control security for your account and how certain features in Performance Manager operate. There's also a link for logging out of the system completely.

Selecting the *Settings* option opens the *Change Password* page by default. Additional pages can be viewed by selecting an option from the **Settings** drop-down list.



Settings: ▼

Change Password

Need to update your password? You're in the right spot. This page has the typical fields necessary for creating a new password for your account.

Make sure to review the rules listed when entering a new password, and definitely don't forget to click **Save** when you're done.

***Note:** Recovering a forgotten password (or username) is handled using [a different process](#) available on the system's Login page.*

Change Security Questions

Another page to help beef up your account security. These security questions help you retrieve forgotten usernames and/or passwords should you ever forget and can't log into the system.

Each of the three questions uses a drop-down list of pre-set questions. Select one, provide an answer, and move on to the next.

Finished with picking and answering the questions? Click **Save**. All done.

Enable Appraisal Auto Save

Don't you just hate it when you're working on something and your computer decides it's time to freeze up on you and you lose the last hour or so of work? Who has time for that?

Fear not. Check the **Enable Auto Save** option on this page, and your appraisals will automatically save as you're working on them. So even if your computer takes a nap, you won't lose all your work.

Enter Email Address

People move all the time, so constantly need to update their mailing address. Well, same thing goes for email addresses. You probably don't change your email that often, but if you ever do, this page lets you update both your work and home (personal) email address.

My Folder

The **My Folder** tab contains all the available pages for an employee's profile in Performance Manager. These pages allow all users to view their own profile information listed on the various pages. Due to the permission levels of many basic employees using Performance Manager, **My Folder** is the only option shown in the navigation bar. Managers and administrators have more navigation bar items.

There are several pages listed under **My Folder**. However, not all pages may be available to you, depending on system settings and your own user role.

- [Appraisals](#). The *Appraisals* page provides an area to review manager, self, and multi-rater appraisals that have been conducted.
- [Checklists](#). The *Checklists* page lists the competency checklists you have been assigned and have completed. The table includes an "Action" column that allows you to edit the checklist or download a PDF of the completed checklist.
- [Compensation](#). The *Compensation* page is where users are able to view the results of previous compensation cycles, and where managers complete compensation adjustments for employees.
- [Development](#). The *Development* page in your profile lists the available reports for any assessments you have completed.
- [Documents](#). The *Documents* page simply lists reference materials related to your employee record, such as certifications and training files.
- [Feedback](#). The *Feedback* page allows users to review feedback that has been given to the employee by their manager.
- [Goals](#). The *Goals* page allows administrators to review and, sometimes, edit goals that you have been assigned to and completed. Development and performance goals are displayed in separate tables.
- [Job Description](#). The *Job Description* page provides links to view job descriptions that were signed off on by employees. Clicking the link for a job title opens a new page that displays the PDF, as well as a link to download the file.
- [Personal Info](#). The *Personal Info* page displays your employee demographic information supplied by the HRIS feed. Personal information here can simply be reviewed and not edited.
- [Personal Routing Users](#). The *Personal Routing Users* page provides an area for you to manage the list of other users in Performance Manager that you use for routing appraisals and goals.
- [Tasks](#). The *Tasks* page lists all your relevant tasks in a table for easy access. Quick links and a table filter feature allow you to locate necessary tasks quickly.
- [Training & Assessment](#). The *Training and Assessment* page provides a view of training that has been assigned or completed by the employee. Clicking the link for a specific item in the tables opens a new window with further details about the selected training.

Appraisals

Appraisals in Performance Manager provide the ability for managers (and employees) to rate performances based on associated job description forms. The page provides an area to review manager, self, and multi-rater appraisals that have been conducted.

Appraisals
Self Appraisals

Schedule Title	Position	Due Date	Completed Date
Annual	Secretary II	10/4/2008	4/8/2010

«
<
1
>
»

Page size: 10 ▼

Displaying items 1 - 1 of 1 (filtered from 4 total entries)

Checklists

Checklists provide a way for managers to assess employees on basic skills that relate to their positions in your organization by listing the competency checklists you have been assigned and have completed. The table includes an "Action" column that allows you to edit the checklist or download a PDF of the completed checklist.

Task Title	Position	Created Date	Due Date	Completed Date	Status
Annual Checklist	Secretary II	3/3/2009	5/1/2009	6/25/2009	Completed

«
<
1
>
»

Page size: 10 ▼

Displaying items 1 - 1 of 1 (filtered from 10 total entries)

Compensation

The *Compensation* page is where users are able to view the results of previous compensation cycles, and where managers complete compensation adjustments for employees.

Compensation Worksheets **My Compensation**

Search...

Cycle Name	Position	End Date
CompCycle 1 - Phase 1	Secretary (101)	12/31/2044

« < 1 > » Page size: 10
Displaying items 1 - 1 of 1

Development

The *Development* page under **My Folder** contains information relating to your professional development at your organization. The page contains tabs for **Assessment Reports** and **Development Plans**.

- **Assessment Reports.** This tab lists the reports for any completed assessments. Clicking on the completed assessment opens the PDF version of the report.
- **Development Plans.** The table on this tab displays all the development plans that have been created. These plans can be created by you, your manager, or system administrators. Clicking a plan from the table opens the plan details page where you can view the plan and make updates about your progress.

Documents

The *Documents* page under the **My Folder** area lists all reference materials related to your employee record, such as certifications and training files.

Miscellaneous Documents **Signed Documents**

Search...

Add Document

Name	Size	Category	Created By	Modified By	Last Modified
HealthcareSource Release Criteria.xls	25K	None	Abernathy, Brian	N/A	12/8/2010
Maintenance Release Checklist PFM_06192010.doc	61K	None	Abernathy, Brian	N/A	12/8/2010
2010 Holidays.doc	78K	None	Abernathy, Brian	N/A	7/19/2010

« < 1 > » Page size: 10
Displaying items 1 - 3 of 3

There are two tabs available on this page:

- **Miscellaneous Documents.** This displays documents that you have uploaded to your employee profile.
- **Signed Documents.** The table on this tab lists all the documents you have reviewed and signed off on using the [Document Sign Off](#) feature.

Clicking the link for a document opens a new window that displays the PDF and a link to download the file.

Adding/Removing documents

Clicking the **Add Document** button brings up the menu for uploading a new file. Choose the file you wish to add, pick the category from the **Select a Category** drop-down menu, then click **Upload**. The file is added to the Miscellaneous Documents table. Now you can reference this file any time you log in, no matter what computer you're using.

The screenshot shows the 'Miscellaneous Documents' section of the HealthcareSource interface. At the top, there are navigation tabs: 'My Folder', 'Employees', 'Job Description', 'Reports', 'Admin', and 'Support'. Below these, the breadcrumb path is 'HCS Non-Integration / Documents - Brian Abernathy'. A table on the left shows employee details: Job Title (Secretary), Department (Administration / 111), Manager (Admin, Jeanie), and Status (Active). Below this is the 'Miscellaneous Documents' section, which includes a table with columns: Name, Size, Category, Created By, Modified By, and Last Modified. The table contains 14 items, with the last item 'Dqa.JPG' highlighted. Below the table is a 'Category' dropdown menu and 'Update' and 'Cancel' buttons. At the bottom of the page is the 'Signed Documents' section, which is currently empty. An 'Upload File' dialog box is open over the table, with a green arrow pointing from the 'Add' button to it. The dialog box has a 'Choose File' button, a 'No file chosen' message, a 'Note: Maximum file size is 30MB.', a 'Select a Category:' dropdown menu (set to 'Training File'), and 'Upload' and 'Cancel' buttons.

Note: The Category is simply for your own reference and does not affect how the file is opened or displayed.

To delete a document, simply click **Remove** from the drop-down menu at the end of the row for the desired item. As always, delete carefully!

Feedback

There are a few different methods of logging feedback, issuing recognition, and keeping track of personal events within Performance Manager, and they can all be viewed from the three tabbed sections on this page. The *Feedback* page allows users to review [Feedback](#) that has been given to the employee by their manager, as well as review any [Recognition and Remarks](#) sent by colleagues. Additionally, if users wish to make a written record of something that occurred, the [Journal](#) tab allows them to add or review entries in their Employee Journal.

The screenshot shows the 'Feedback' tab selected. At the top, there are navigation tabs for 'Feedback', 'Timeline', and 'Journal'. Below the tabs is a search bar and an 'Add Feedback' button. The main content is a table with the following data:

Type	Feedback	Created Date	Due Date	Status
Corrective	Customer Service	10/22/2009	10/31/2009	Employee Review
Coaching	Project Management	12/21/2017	12/21/2017	Employee Review
Positive	Quality of Work	12/21/2017	12/22/2017	Employee Review

At the bottom of the table, there is a pagination control showing '1' and a 'Page size' dropdown set to '10'. A status message at the bottom right says 'Displaying Items 1 - 3 of 3'.

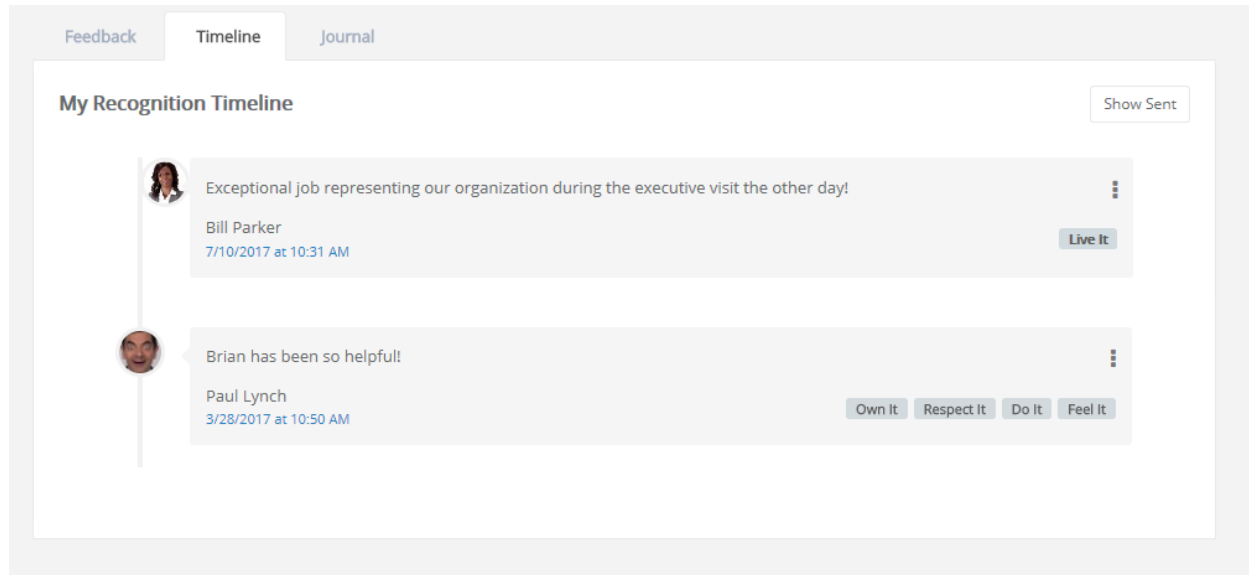
Feedback

On this page, the area found under the **Feedback** tab allows the administrator to view and manage feedback for the selected employee. Whether it's positive reinforcement, coaching to foster improvement, or issuing corrective feedback, such occurrences may be issued and reviewed from here.

Any existing feedback can be viewed by clicking the link in the available tables. Alternately, it can also be printed or deleted via the options found in the **Actions** drop-down menu in the right-most column of the feedback table.

New feedback (and notes) can be created as well by using the **Add Note** and **Add Feedback** buttons. For additional details about these options, please refer to the [Notes](#) and [Adding Feedback](#) pages.

Timeline



The **Timeline** tab on this page shows a list of feedback received via the [Recognition and Remarks](#) form, presented in chronological order.

Clicking **Show Sent** in the upper-right corner of the tab displays a list of all recognition sent to other employees. When clicked, this button changes to **Show Received**. Clicking this button again reverts the page back to its original display.

Additional options to **Print** or **Delete** items from the recognition timeline are found by clicking the **Actions** menu, which is shown as three vertically-aligned dots on the right-hand side of an entry.

Journal

The screenshot shows the 'Journal' tab in the HealthcareSource interface. At the top, there is a navigation bar with tabs for 'My Folder', 'Employees', 'Job Description', 'Reports', and 'Admin'. The user is identified as 'Brian Abernathy'. Below the navigation bar, there is a breadcrumb trail: 'HCS Nonintegration (STAGE DATA) / Feedback - Brian Abernathy'. The main content area is titled 'My Employee Journal Timeline' and features an 'Add Journal Entry' button. Three journal entries are listed in chronological order:

- Nurse Manager update**: After thinking long and hard about the role & its many additional responsibilities, I have decided to pursue the Nurse Manager role. Jane Smith has agreed to coach me on what to expect and how to handle things. Occurred 12/20/2017, Created: 12/21/2017.
- Shadowing Nurse Manager**: Shadowed Jane Smith (Nurse Manager) to see if it is a role I would like to move into in the future. Occurred 12/7/2017, Created: 12/12/2017.
- Hand washing best practices seminar**: Taught Hand washing best practices seminar to all nurses on floor. Occurred 11/1/2017, Created: 12/12/2017.

Each entry includes a date, a description, and a 'Created' timestamp. A blue thumbs-up icon is visible in the bottom right corner of the journal area.

The **Journal** tab displays your own record of events and accomplishments that were entered using the [Journal](#) form. Entries in this page are presented in chronological order, based on the date the entry was created. Creating a new entry is conducted via the **Add Journal Entry** button, which displays the same form that appears after clicking the **Journal** icon. The **Actions** menu presents options to **Edit** an entry or **Delete** it from your timeline.

Goals

The *Goals* page lists goal forms created and/or assigned to you. This includes both Development and Performance goals, which are displayed in separate tabs on the page.

Job Description

The *Job Description* page provides links to view job descriptions that were signed off on by employees. Clicking the link for a job title opens a new page that displays the PDF, as well as a link to download the file.

Search...

Job Title	Signed On
Secretary	11/25/2013
Secretary	2/18/2009
Administrative Services Coordinator	8/8/2008
Administrative Services Coordinator	8/8/2008

« < 1 > »

Page size: 10 ▾

Displaying items 1 - 4 of 4

Personal Info

The *Personal Info* page under the **My Folder** area lists your profile information, such as job title and manager, as well as any Licenses and Certifications that are attached to your record in Performance Manager. Though you are not able to change any of this information from this page, you should contact your manager if you notice any discrepancies in your profile.

Licenses and Certifications Table

The table for Licenses and Certifications displays information at-a-glance for licenses or certifications.

- **Name:** Name or type of license or certification
- **State:** State the license or certification was issued by
- **Start Date:** Date the license or certification was given
- **Expiration Date:** Date the license or certification expires

Note: Only users holding Admin permissions may add, edit, or delete information from the Licenses and Certifications table. If you need to update your license or certification details, you'll need to reach out to your Performance Manager system administrator for their assistance with the task.

Personal Routing Users

The *Personal Routing Users* page under the **My Folder** area provides an area for you to manage the users that you route specific forms to for review. These users appear in drop-down lists when you route forms for review in Performance Manager.

Add Personal Routing User

Employee ▲	Routing Types ◅	
Jones, Lily Rose	Appraisal Tasks <i>(Optional)</i> Feedback Tasks <i>(Optional)</i>	⋮
Kelter, Kathleen	Appraisal Tasks <i>(Required)</i>	⋮
Long, Andy	Appraisal Tasks <i>(Required)</i> Review Performance Goals Form <i>(Optional)</i>	⋮
Lynch, Meagan	Review Performance Goals Form <i>(Optional)</i>	⋮
Lynch, Paul	Appraisal Tasks <i>(Optional)</i>	⋮

« < 1 > »

Page size: 10 ▼

Displaying items 1 - 5 of 5

Clicking the **Add Personal Routing User** button opens a new page with an employee picker where you can locate and select a user to add to your list. The **Type** of routing user is determined by your system administrator.

Routing User types

There are four types of routing users:

- **Appraisal Tasks.** These are employees who review appraisal forms.
- **Feedback Tasks.** These are employees who review corrective feedback before it is discussed with the employee.
- **Job Description Approval.** These are employees who review job description edits made by managers.

- **Review Performance Goals Form.** These are employees who send and receive appraisals for approval/sign off during the evaluation process.

Tasks

All tasks that have either been assigned to you, or are related to you in some way, are listed on this page.

Your relevant tasks are laid out in a table for easy access. Quick links and a table filter feature allow you to locate necessary tasks quickly.

Training & Assessment

The *Training and Assessment* page provides a view of training that has been assigned or completed by the employee.

Title	Created Date	Due Date	Completed Date	Credit Hours
Professional Development: ACLS	11/22/2010	11/22/2010	11/22/2010	
Online Training: Fraud Abuse Compliance	9/22/2008	10/3/2008	12/1/2010	
Online Training: Fire and Safety (online training 7/23 230pm)	8/5/2008	7/26/2008	12/1/2010	
Online Training: Right to Know (online training 7/23 230pm)	8/5/2008	7/26/2008	12/1/2010	
Online Training: Emergency Preparedness (online training 7/23 230pm)	8/5/2008	7/26/2008	12/1/2010	

«
<
1
>
»

Page size: 10 ▼

Displaying items 1 - 5 of 5

This table is read-only; items are automatically added when training and assessment tasks are completed.

User and Help menus

The navigation bar in Performance Manager has two rouge options hanging out to the far right side, away from the usual solution feature menus.

- [User menu](#). The user menu is the one that has your name on it - so hopefully it's pretty obvious which one we're referring to. This menu provides access to several *Settings* pages that control your account security and other system options, along with the system's **Log Out** link.
- [Help menu](#). The *Help* and *Release Notes* options under this menu item launch the online help system in a new browser window or tab. The selected option determines which page of the online help system is displayed once opened. Clicking the *Support* option takes you to the HealthcareSource Community Support portal.

Help menu

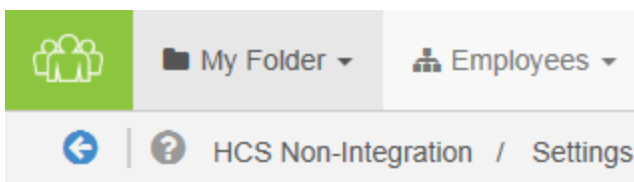
The Help menu in the navigation bar provides quick access to pages found in the online help system. Clicking any of the available links launches the online help system in a new browser window or tab and displays the topic for the selected option.

- [Help](#). Opens the help system to the home page, from which you can perform a search for topics, download user guides, or browse the available content.
- [Release Notes](#). Opens the help system to the Release Notes topic, which lists feature enhancements and bug fixes we've delivered over the given time periods.
- [Support](#). Takes you to the HealthcareSource Community Support portal, where you can search our knowledgebase of articles and submit support tickets.

User menu

The user menu provides access to several settings pages that control security for your account and how certain features in Performance Manager operate. There's also a link for logging out of the system completely.

Selecting the *Settings* option opens the *Change Password* page by default. Additional pages can be viewed by selecting an option from the **Settings** drop-down list.



Settings:

Change Password

Need to update your password? You're in the right spot. This page has the typical fields necessary for creating a new password for your account.

Make sure to review the rules listed when entering a new password, and definitely don't forget to click **Save** when you're done.

***Note:** Recovering a forgotten password (or username) is handled using [a different process](#) available on the system's Login page.*

Change Security Questions

Another page to help beef up your account security. These security questions help you retrieve forgotten usernames and/or passwords should you ever forget and can't log into the system.

Each of the three questions uses a drop-down list of pre-set questions. Select one, provide an answer, and move on to the next.

Finished with picking and answering the questions? Click **Save**. All done.

Enable Appraisal Auto Save

Don't you just hate it when you're working on something and your computer decides it's time to freeze up on you and you lose the last hour or so of work? Who has time for that?

Fear not. Check the **Enable Auto Save** option on this page, and your appraisals will automatically save as you're working on them. So even if your computer takes a nap, you won't lose all your work.

Enter Email Address

People move all the time, so constantly need to update their mailing address. Well, same thing goes for email addresses. You probably don't change your email that often, but if you ever do, this page lets you update both your work and home (personal) email address.

Tasks

Performance Manager simplifies the employee performance management process by automating the workflow and content for performance appraisals, job descriptions, skills, goals, succession planning, and performance reporting. These automated processes are driven by specific tasks assigned to employees.

The *Tasks* page (found under the **My Folder** drop-down menu) lists all the tasks that have been assigned to you in Performance Manager. It provides a searchable, filterable, sortable table that makes it easy to browse, locate, and complete your various tasks and assignments.

The screenshot shows the 'My Task List' interface for Angela Ludwig. The page includes a navigation bar with 'My Folder', 'Employees', 'Job Description', and 'Reports'. Below the navigation, there is a user profile for Angela Ludwig, Nurse Manager, and several action buttons: 'Learning Opportunities', 'Learning Assignments' (7), 'Licenses and Certifications' (3), and 'Alerts' (7). A 'Filters' sidebar on the left allows filtering by 'Task Types' (Appraisal: Not Started (3), License/Certification Reminder (1), Performance Goals (4), Review Job Description (1), Self Appraisal (1)) and 'Due Date' (Next 30 Days (4)). The main 'My Task List' table contains the following data:

Type	Task	Employee Name	Due Date	Department/Position Name
License/Certification Reminder	Expiring: CCP	Angela Ludwig	9/23/2016	Nurse Manager, Nursing
Self Appraisal	Self Appraisal	Angela Ludwig	10/26/2016	Nurse Manager, Nursing
Review Job Description	Sign Job Description	Angela Ludwig	11/1/2016	Nurse Manager, Nursing
> Appraisal: Not Started	2016 Performance Review	Jennifer Morse	11/25/2016	Nurse, Nursing
> Appraisal: Not Started	2016 Performance Review	Thomas Joseph	11/25/2016	Nurse, Nursing
> Appraisal: Not Started	2016 Performance Review	William Turner	11/25/2016	Nurse, Nursing

Most features of Performance Manager have associated tasks so employees know when they are required to complete work in the system. Notifications are also sent when tasks are assigned, so users don't need to continually log in to check for new assignments.

About the Tasks page

The *Tasks* page under **My Folder** displays a list of all the tasks you have been assigned. This table provides a way to easily locate and complete necessary tasks.

The screenshot shows the HealthcareSource interface for Angela Ludwig, a Nurse Manager. The header includes navigation tabs (My Folder, Employees, Job Description, Reports), user information (Angela Ludwig, Help), and a search bar. Below the header are four action tiles: Learning Opportunities, Learning Assignments (7), Licenses and Certifications (3), and Alerts (7). The main content area is divided into 'My Filters' and 'My Task List'. The 'My Filters' section includes 'Task Types' (Appraisal: Not Started (3), License/Certification Reminder (1), Performance Goals (4), Review Job Description (1), Self Appraisal (1)) and 'Due Date' (Next 30 Days (4)). The 'My Task List' table contains the following data:

Type	Task	Employee Name	Due Date	Department/Position Name
License/Certification Reminder	Expiring: CCP	Angela Ludwig	9/23/2016	Nurse Manager, Nursing
Self Appraisal	Self Appraisal	Angela Ludwig	10/26/2016	Nurse Manager, Nursing
Review Job Description	Sign Job Description	Angela Ludwig	11/1/2016	Nurse Manager, Nursing
> Appraisal: Not Started	2016 Performance Review	Jennifer Morse	11/25/2016	Nurse, Nursing
> Appraisal: Not Started	2016 Performance Review	Thomas Joseph	11/25/2016	Nurse, Nursing
> Appraisal: Not Started	2016 Performance Review	William Turner	11/25/2016	Nurse, Nursing

The interface provides information at a glance, and several ways to filter the Tasks table in order to locate specific items.

Employee Profile header

The Employee Profile header displays key information and provides quick links to take action on the listed items. A color-coding system for items delivers additional quick-view indicators so it's easy to see when it's time to review and update profile information.

The close-up shows the Employee Profile header for Angela Ludwig, Nurse Manager at General Hospital. It features a profile picture, name, and position. To the right are four action tiles: Licenses and Certifications (3, red background), Alerts (7, orange background), Learning Opportunities, and Learning Assignments (7, blue background).

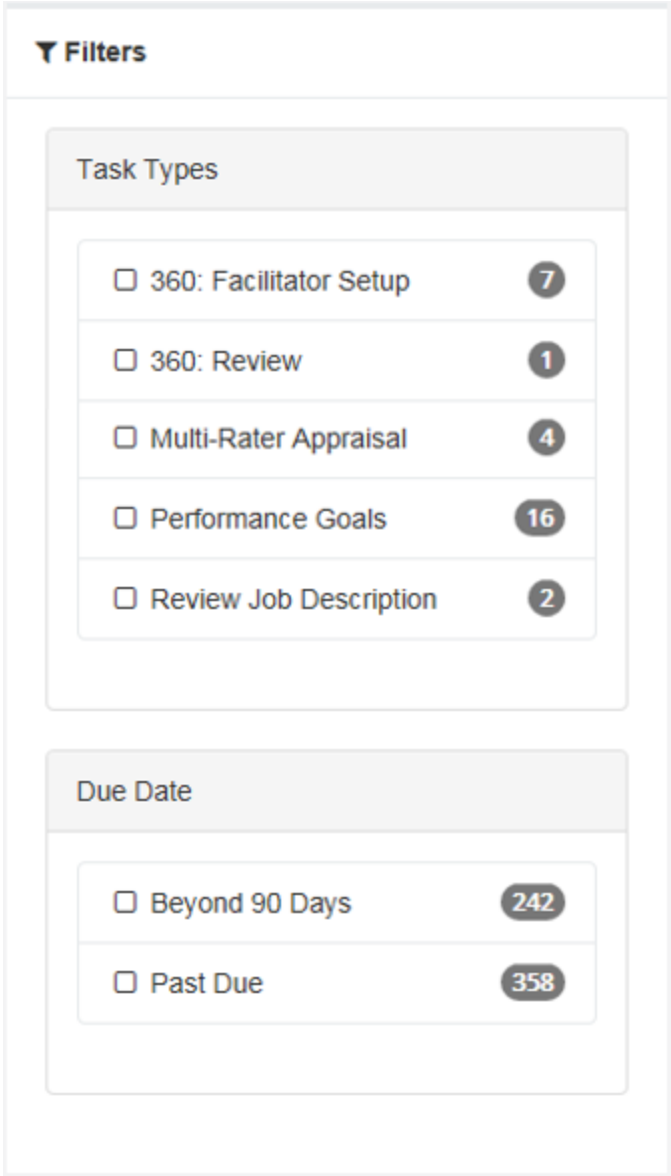
Available areas in this header include:

- **Employee and Position information.** This area displays the employee name and position. Scroll arrows are available when an employee has multiple positions.
- **Licenses and Certifications.** This tile shows how many Licenses and Certifications reside in the employee's profile. A green background indicates everything is up-to-date; red background means there's items that have a renewal date upcoming or past due. Clicking the tile opens a table view that lists items under the header.
- **Learning information.** Available to clients with integrated NetLearning functionality, these areas provide access to NetLearning widgets for enrolled and available courses and classes. The Learning Assignments tile also displays the number of current assignments for the employee.

- **Task Alerts.** Displays the number of overdue tasks in the task list. Clicking this tile in the header opens a new page that lists the overdue tasks.

Filters and Search

The new *Taskpage* lists available filters in their own area to the left of the Tasks table. Filters include options for **Task Type** and **Due Date**.



The screenshot shows a sidebar titled "Filters" with a dropdown arrow. It contains two main sections: "Task Types" and "Due Date". Each section lists filter options with checkboxes and a count in a dark circle.

Filter Category	Filter Option	Count
Task Types	<input type="checkbox"/> 360: Facilitator Setup	7
	<input type="checkbox"/> 360: Review	1
	<input type="checkbox"/> Multi-Rater Appraisal	4
	<input type="checkbox"/> Performance Goals	16
	<input type="checkbox"/> Review Job Description	2
Due Date	<input type="checkbox"/> Beyond 90 Days	242
	<input type="checkbox"/> Past Due	358

The items listed in each set of filters displays a number that indicates how many tasks match that specific filter. Clicking the checkbox next to an item filters the results shown in the table.

Right above the table is a **Search** field that allows you to search for specific tasks in the list. This field is a type-ahead field, so the table automatically begins to filter down with each character entered into the field. This field searches across numerous fields for tasks.

My Task List

Search...

Tasks table

Tasks are opened by clicking anywhere in their row. Tasks with associated sub-tasks display an arrow that, when clicked, expands the row to display the related sub-tasks.

	Type	Task	Employee Name	Due Date	Department/Position Name
	Review Document	Employee Guide	Ed Hardy	10/31/2016	Clinical Nurse Manager, Med-Surg
▼	Appraisal: In Progress	New Hire	Ellen Tracy	12/31/2016	Certified Nurse Aide, Med-Surg
Status	Type	Assigned To		Due Date	
Complete	Self Appraisal	Ellen Tracy		12/31/2015	
Complete	Multi-Rater Appraisal	Tory Burch		12/31/2015	
Complete	Multi-Rater Appraisal	Kate Spade		12/31/2015	

« < 1 > »

Page size: 25

Displaying items 1 - 2 of 2

The tasks table can be sorted by almost any of the available columns to help you quickly locate tasks. Simply click on the column heading to toggle between *Ascending*, *Descending*, and *Off*.

The column currently being used for sorting is indicated with a gray background fill. By default, the table is sorted by **Due Date**.

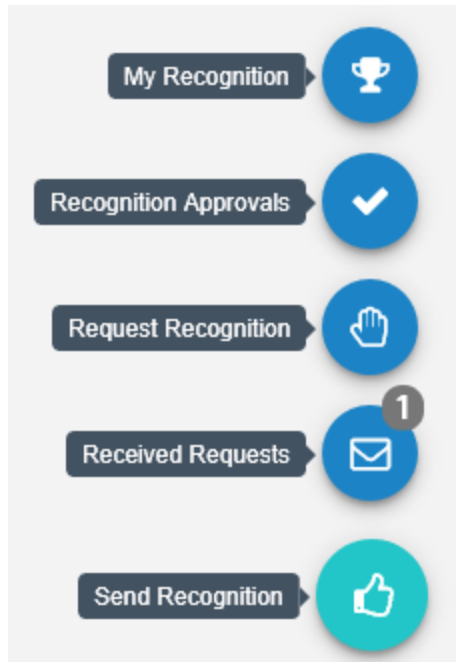
Recognition and Remarks

[Recognition and Remarks](#) is a commenting system that allows employees to send input to other employees about a recent exchange or behavioral observation at any time - not just when requested or during annual review periods. Its feedback form provides fields for selecting employees, associating specific values, and general comments for feedback.



Hovering your cursor over the **Recognition and Remarks** icon in the lower-right corner of the page displays additional feedback options, including:

- **My Recognition.** Displays all of your received recognition.
 - **Recognition Approvals.** For managers only; displays a list of recognition sent to your employees anonymously.
 - **Request Recognition.** Allows you to send a request for input from specific employees.
 - **Received Requests.** Lists any requests for input you have received from colleagues.
 - **Send Recognition.** Opens the form used to send recognition to a colleague.
-



*Note: Depending on your system's settings, the **Employee Journal** may also be included with these feedback options.*

Employee Journal

The [Employee Journal](#) is a quick and easy way to keep your own written record of events and accomplishments that happen throughout the year. Using the journal allows you to quickly jot down a summary of events and activities, then reference them just as quickly whenever you need. Keep track of your training seminars, conference attendance, or any quick activities you want to remember, all within your own personal profile.



The **Employee Journal** icon is found in the lower-right corner of the *Taskpage*.

*Note: Depending on your system's settings, the **Employee Journal** may either be grouped in with the **Recognition and Remarks** feedback options, or displayed independently.*

Completing tasks

The *Tasks* page in Performance Manager provides an way to quickly locate and complete necessary tasks.

1. From the *Tasks* page, locate the desired task from the table.
2. Click anywhere in the task's row. This opens the page necessary to complete the task.

The type of page that displays after clicking a task depends on the type of task selected. After completing the necessary actions for the task, it is marked as *Complete* and removed from your task list.



Job Descriptions

Job descriptions in Performance Manager are detailed descriptions of positions at your organization. They typically include such information as duties and expectations for the job.

Every job employee in Performance Manager is assigned to at least one job description, though it is also possible to be assigned to multiple job descriptions if necessary. Job descriptions are reviewed and signed off by both the employee and their manager. PDF versions of approved job descriptions are saved to employee profiles.

Employees are able to view their own job description from the [Job Description](#) page under **My Folder**. The table on this page lists all the job descriptions signed off by the employee and the date they were approved. Clicking the title of a job description displays its detailed description on a new page.

Job Title	Signed On
Scheduler	6/26/2008
Administrative Services Coordinator	6/15/2007

Only system administrators are able to manage positions and their related job descriptions, templates used to create job descriptions, and special forms used to populate job descriptions. In other words, if you need to [draft a new job description](#), or [edit an existing one](#), you'll need to work with your local administrators to set things up the way you need.

Reviewing a Job Description

Employees are required to review and sign off on all job descriptions they are assigned to in Performance Manager. Any time a new job description is assigned to an employee, they receive a task to review and approve that job description.

To review and approve a job description:

1. Click anywhere within the **Job Description** task, in the table on the *Tasks* page under **My Folder**.

My Task List Actions ▾

Search...

Type	Task	Employee Name	Due Date	Position/Department Name
Job Description: Review Routed	Review Job Description for Secretary (101) routed by Brian Abernathy	Mary Dalton	5/9/2018	Patient Coord-Treatment Plan'g, Patient Services

« ‹ 1 › » Page size: 25 ▾

Displaying Items 1 - 1 of 1

2. Scroll down to review all the information contained in the job description.
3. Click **Sign** button at the bottom to acknowledge your review of the job description.

Clicking **Sign** creates a read-only PDF file of the job description and places it in the employee electronic folder on the *Job Description* page.

Some employees may have the option to **Refuse to Sign** the job description based on their permissions. Refusing to sign a job description indicates that the employee has an issue with some information included in the description. Clicking **Refuse to Sign** allows the employee to send the job description back to their manager, with comments, for further review.

Performance Goals

Performance goals provide a way to track and evaluate employee performance across an organization. Corporate directives in the form of basic [pillars](#) are defined and subsequent goals for departments, facilities, and individual employees are aligned upwards.

Employees can view their performance goals on the *Goals* page under **My Folder**. Managers are able to view and assign goals to employees from the *Performance Goals* page under **Employees**.

Adding goals

Goals can be added by either a manager or an employee, depending on the options chosen when the appraisal is scheduled.

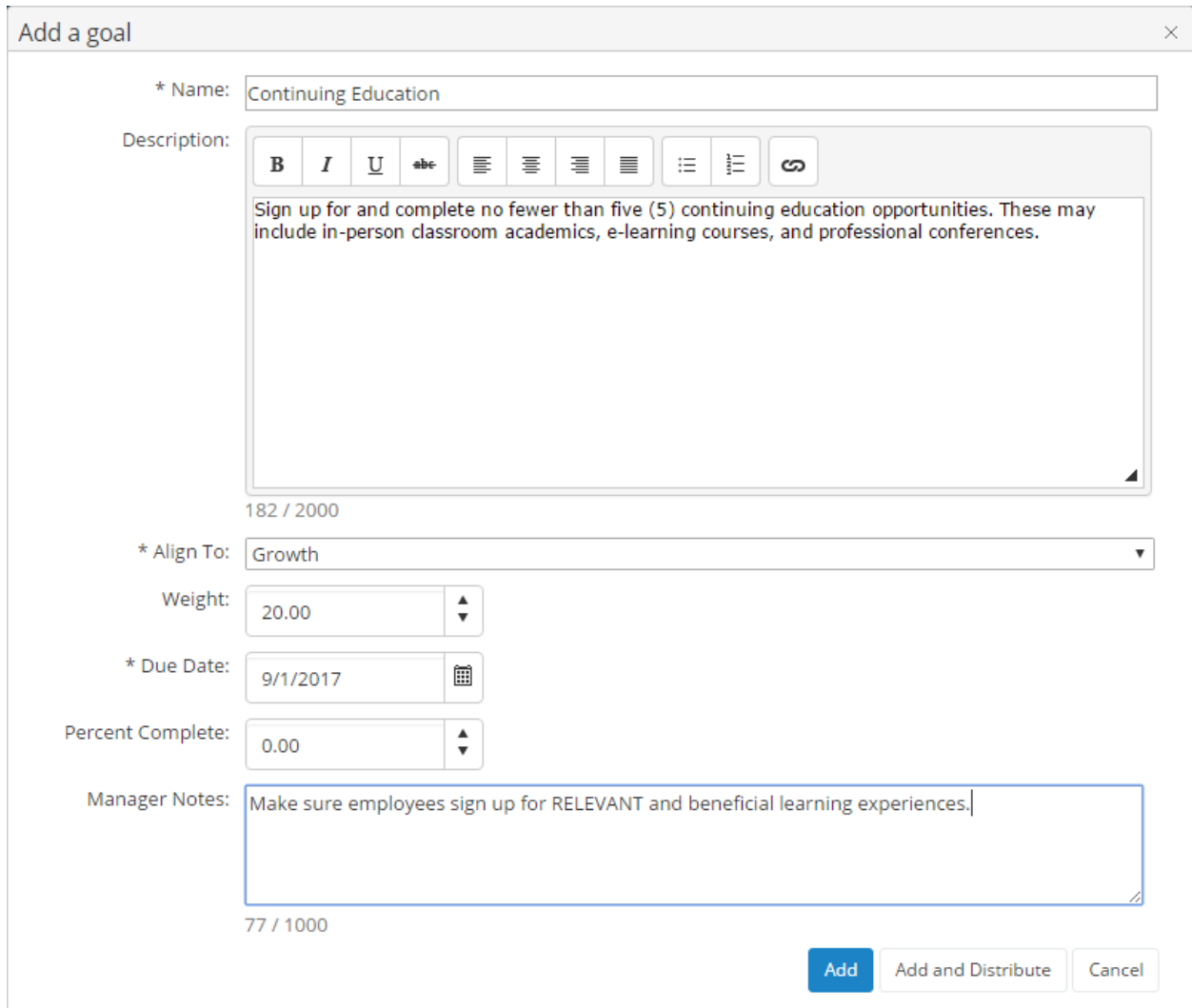
A **Performance Goals** task appears in the task list when you have been assigned a goal form to complete for the appraisal schedule. Clicking the link from the task list opens the *Performance Goals* page, where goals can be reviewed, added, and edited.

Goals can be created from scratch, or [copied from previous goal forms](#). This topic covers creating goals from scratch.

Adding goals - Employee

These steps take place from the *Performance Goals* page.

1. Click **Add** option from the **Actions** menu above the *Goals* table. The *Add a goal* pop-up window opens.



2. Complete the fields in the *Add a goal* window as needed.
3. Click the **Add** button when complete. The pop-up window closes and the new goal now appears in the list.
4. Repeat steps 1 through 3 until all goals have been added to the table.

Once all the necessary goals have been added to the My Goals table, you must submit the goal form for approval from your manager. Simply click the **Send for Approval** button under the table when you are ready to submit your goals.

Tip: Remember, if you are using weights for your goals, the **Total Weight** of your goal form (shown in the upper right corner of the My Goals table) must equal 100% before you submit the form for approval.

Copying goals

When adding goals, users have the option to create goals from scratch, or copy goals from previous goal forms.

Managers and employees can copy active, approved goals from previous goal forms. Only individual goals can be copied (no corporate goals).

Copying goals - Employee


These steps take place from the *Performance Goals* page.

1. Click the **Copy** button above Goals table. The *Select goals to copy* pop-up window opens.

Select Goals to Copy	
Goal Form:	
Goal for TC#27830	
Goals	
<input type="checkbox"/>	<p>Goal1 Goal1</p> <p><i>Aligned To: Growth</i> <i>Weight: 100%</i> <i>Due Date: 08/01/2012</i></p>

Copy Goals Cancel

2. Select a **Goal Form** from the drop-down menu. A list of goals on the selected form loads in the table below.
3. From the list of goals, check the box next to each goal you wish to copy.
4. When a goal is selected, the **Weight** and **Due Date** field become editable. Make necessary edits to these fields.

<input type="checkbox"/>	Goals
<input type="checkbox"/>	<p>Goal aligned to Performance Pillar</p> <p><i>Aligned To: Performance</i> <i>Weight: 0%</i> <i>Due Date: 12/31/2013</i></p>
<input checked="" type="checkbox"/>	<p>Goal aligned to Quality Pillar</p> <p><i>Aligned To: Quality</i> <i>Weight: <input type="text" value="0"/></i> <i>Due Date: <input type="text" value="12/31/2013"/> </i></p>

5. Click the **Copy Goals** button at the bottom of the window when finished.

Clicking **Copy Goals** adds the selected goals to the goal form and closes the pop-up window. Additional goals can be created and/or copied to the goal form at this point.

Updating goals

Updating a goal consists of either adding notes (both managers and employees) and/or changing the **Percent Complete** field for a goal (managers only).





Adding notes

Goal notes are added to individual goals from a goal form. Managers are able to add notes to employee goals, and employees can add notes to their own goals and respond to any manager notes.

An employee can reach their goal form by clicking the **Goals** link under the **My Folder** area in Performance Manager.

These steps take place from the goals form found on the *Goals* page.

1. From the goal form, click the **Show Notes** link for the goal where you want to add a note. This expands the row and displays any previous notes that may have been left and provides a text box to add a new note.
2. Type in text for the new note.

Goals		Total Weight: 100.00%	
		Actions	
Earn certificate Aligned To: Growth Hide Notes		Due: 6/30/2015 Percent Complete: 100% Weight: 33.34%	   
<input type="text" value="Enter new note"/> 0 / 1000		<input type="button" value="Add Note"/>	
Several certificates are required by Brian Abernathy on 06/15/2015		<input type="button" value="Remove"/>	

3. Click the **Add Note** link under the text box when finished with the note.

The row reloads to show the new note has been added to the goal.

More about Performance Goals

While many of the most common tasks and procedures handled via Performance Goals have been discussed, there are some more features and capabilities you may be interested in learning about.

These include:

- [Check-in tasks](#). These tasks are intended to function as reminders to review or update any previously-approved goals.
- [Department Goal Forms](#). Managers are given greater control over the goals set for their own individual departments here, and they may add and edit their departmental goal forms as needed.
- [Notes](#). Adding notes to individual goals helps you keep track of additional details, supplemental information, or even serve as a method of correspondence between employees and managers.
- [Notifications](#). Manage automatic notifications that are sent whenever certain criteria are met.
- [Weighting](#). Individual goals may be "weighted" more than one another, putting a greater (or reduced) level of importance on specific objectives.

Check in tasks

Check in tasks are reminders to review or update approved goals. They appear as tasks in a user's **My Tasks** table in Performance Manager.

Check in tasks are created when setting up a new appraisal schedule, and are assigned before an employee's full appraisal. Employees are able to add notes to their list of goals when performing this task. Once finished, clicking the **Dismiss** button completes the task and removes it from the employee's task list.

Notes

Notes can be added to individual goals. Both managers and employees can add notes to a goal; only the person who created the note can delete it.


Notes can be used to keep track of important details regarding the goal, provide status information when updating completion percentages, or simply correspondence between an employee and a manager.

Notes are viewed by clicking the **Show Notes** link in the goal. The number of notes a goal has is indicated by the number in parenthesis next to the **Show Notes** link.

Individual Goals for Anne Jones (Secretary/Rehab Aide) Actions ▾

Search...

Goals	Total Weight: 100.00%
<p>Continuing Education Sign up for and complete no fewer than five (5) continuing education opportunities. These may include in-person classroom academics, e-learning courses, and professional conferences.</p> <p><i>Aligned To:</i> Growth Hide Notes</p> <p>Enter note here...</p> <p>0 / 2000</p> <p style="text-align: right;">Save</p>	<p>Due: 9/1/2017 Percent Complete: 0% Weight: 20%</p>

 by Brian's Abernathy
Make sure to sign up for relevant and enriching learning experiences!

3/6/2017 at 2:19 PM ✕

There are two types of notes that can be added to a goal:

- **Manager notes.** These are notes that are added to a goal when it is initially created, or when a manager returns to a goal form and edits an existing goal. Manager notes are not viewable by employees.
- **Goal notes.** Goal notes are notes added to individual goals that are viewable by anyone that has access to the employee goal form. Both managers and employees can create goal notes; only the person who created the goal note can delete it.

Notifications

In order to keep both employees and managers up to date with the progress of their goals in the system, automatic notifications are sent when certain actions take place.

- **Manager approval of goals.** When a manager approves an employee's goal form, the employee is sent an email notification.

- **Manager rejection of goals.** Employees also receive a notification if a manager rejects their submitted goal form. This isn't a notification of rejection; rather, when a manager rejects a goal form, the employee is re-assigned the task to enter their goals. Therefore, the employee receives a notification that they must enter their goals.

Weighting

The Goals module provides a weighting system for individual goals. This allows users to determine which goals hold more importance than others, or ones that may require additional effort to complete.

The screenshot shows the 'Add a goal' form with the following details:

- Name:** Continuing Education
- Description:** Sign up for and complete no fewer than five (5) continuing education opportunities. These may include in-person classroom academics, e-learning courses, and professional conferences.
- Align To:** Growth
- Weight:** 20.00
- Due Date:** 9/1/2017
- Percent Complete:** 0.00
- Manager Notes:** Make sure employees sign up for RELEVANT and beneficial learning experiences.

Buttons at the bottom: Add, Add and Distribute, Cancel.

Individual goals can be assigned a weight when they are added to the system. When creating a set of goals for a user, the sum total of weight for all the combined goals must equal 100%. Users will not be able to submit their goals for approval unless the total weight equals 100%.

The **Apply Weights Equally** button allows you to quickly distribute weight evenly across the available individual goals.

It is not necessary to add weights to goals.

The weighting feature is an option for the Goals module. When the option is not activated, the “Weight” column does not appear in pop-up windows or goals tables. This option, labeled **Show weights on Job Descriptions and Goals**, can be found on the *Settings* page under the **Admin** area in the **Choose Appraisal Options** section.

Development Goals

Development goals are used by managers to encourage employees to improve and meet specific performance targets. These goals appear as tasks for employees to complete once the goal has been met.

Development goals can be found on the *Goals* page under **My Folder**. Updates to goals can be made by both employees and managers throughout the year.

Development Goals workflow


The basic workflow for development goals is as follows:

1. A manager creates a development goal for an employee.
2. The employee receives a task and completes the development goal.
3. The manager reviews the employee's completion of the goal.

About the Development Goal form

The Development Goal form contains several fields for identifying and tracking the assigned goal.

Add Goal

Created By	
Date Created	3/7/2017
Employee	MANNY MANAGER
*Type	Select Goal Type ▼
*Title	<input type="text"/>
Details	<div style="border: 1px solid #ccc; height: 60px;"></div>
Measure	<div style="border: 1px solid #ccc; height: 60px;"></div>
*Due Date	<input type="text"/> 

* Indicates Required Field

- **Created By.** The manager that created the goal for the employee.
- **Date Created.** The date the goal was added to the system.
- **Employee.** The employee assigned to the goal.
- **Type.** Drop-down menu with three selections for goal type:
 - **Individual.** These goals relate directly to the employee.
 - **Departmental.** These goals are related to goals set for the employee's specific department.
 - **Organizational.** These goals relate to the goals set for the overall organization. Selecting this option changes the **Title** field from a generic text field to a drop-down list that contains all available organizational goals.
- **Title.** Title of the goal. For **Individual** and **Departmental** goals, this field is a text box. However, when creating an **Organizational** goal, this becomes a drop-down field that lists all the available organizational goals, from which a selection must be made.
- **Details.** Details about the goal, which can include such information as why the goal has been created and what is hoped to be achieved.
- **Measure.** This details how success in meeting the goal is determined.
- **Due Date.** Sets the date by which the employee must complete the goal. It also serves as the due date for the task that is created for the employee.

Completing Development Goals

Employees must complete development goal tasks assigned to them by managers.

These steps take place from the *Tasks* page under **My Folder**.

1. Click the link for the desired development goal task in the Tasks table. This opens the *Goal* page for the task.
2. Enter in any **Status Comments** about the goal. Click the **Save Comment** button to save comments.

Employee Evaluation

Comments	I rocked this. 01/08/2015
*Status	<p>Status Comment</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Did this in record time. </div> <div style="text-align: right; margin-bottom: 5px;"> ^ v </div> <div style="text-align: center; margin-top: 5px;"> Save Comment </div> </div> <p> <input type="radio"/> Met <input type="radio"/> Partially Met <input type="radio"/> Not Met </p>

Note: Multiple comments can be added to goals. Employees can also add comments without completing the overall task by clicking the **Save Comment** button and not signing off on the task.

3. Select a **Status** for the goal.
4. Enter any additional **Employee Comments** as necessary.

Signature

I understand that my electronic signature carries the same legal weight and authority as my written signature.

Employee Comments

Mad skillz. Time for a raise.

^
v

Name **Andy Long** Date **01/08/2015**

5. Click the **Sign** button.

Clicking the **Sign** button completes the task for the employee. The manager receives a new task to review and finalize the development goal task for the employee. If the manager feels additional work or explanation is required, they may opt to send the task back to the employee. Otherwise, the manager's sign-off officially completes the task.

Refuse to Sign

A **Refuse to Sign** option is available that provides employees with the ability to refuse to sign off on developmental goals added by their manager.

When this option is enabled for an employee, an additional **Refuse to Sign** button is available at the bottom of the goal form when performing their **Developmental Goal** task. Clicking this button sends the feedback to the manager without signing off.

Employees can still leave **Comments** even if they refuse to sign off on the goal. Any text entered into the **Comments** field is displayed to the manager.

When an employee refuses to sign off on feedback, the form is sent back to their manager as a **Refused to Sign: Goal** task. Managers are required to review the goal form and sign off to complete the task. The Signature section of the form notes that the employee selected the **Refuse to Sign** option for the goal, and displays any comments left by the employee.

Managers have the option to **Sign** the goal form, which completes the task, or **Send Back to Employee** for further review and comment.

Appraisals

Appraisals in Performance Manager provide the ability for managers and employees to rate workplace performances based on the job description forms associated with their position. These appraisals are conducted on varying intervals depending on your company's own policy.

Appraisals provide a measurement of employee performance based on the benchmark criteria pre-established for their job. This differs from the 360 Review, which focuses more on the skills and contributions an employee provides to the workplace and their co-workers.

Manager appraisals are conducted to rate and comment on each of their individual employee's performance throughout the duration of the period. Employees conduct self appraisals and multi-rater appraisals to share their own beliefs and estimations on how their own— or their co-workers' — accomplishments stack up to what was expected of them throughout the evaluation period.

Appraisal types

There are three types of appraisals in Performance Manager:

- **Manager appraisal.** This is the basic employee appraisal form, based on a job description. Managers complete this evaluation form for all their direct-report employees.
- **Self appraisal.** Self appraisals are completed by employees in reference to their own performance. Self appraisals are reviewed with the employee's manager.
- **Multi-rater appraisal.** As part of 360-degree feedback in Performance Manager, multi-rater appraisals are completed by selected employees. Managers select which users conduct appraisals about their employees.


Completing a self appraisal


As an employee, your manager can assign you a task to complete a self appraisal where you evaluate your own performance. This requires you to complete an appraisal form that lists performance criteria you are evaluated on based on your job description.






When you are assigned a self appraisal, a **Self Appraisal** task appears in your tasks list. There is often a due date listed by which you need to complete the appraisal.

These steps take place from the *Tasks* page under **My Folder**.

1. In the Tasks table, locate and select the **Self Appraisal** task. This opens the appraisal form.
2. Review each item on the appraisal form and provide a rating based on your performance.
3. You may be able to provide notes on individual items in the form by clicking the notes icon (

 for each item listed. This opens a large text field for you to enter additional comments on the appraisal item. However please note that in order for your comments to be saved, you must select or enter an evaluation option.

 **Facility Wide Expectations**

- Fosters interdisciplinary, collaborative relationships within the department and the organization 
 - Meets Needs Improvement N/A
- Works cooperatively and collaboratively building a positive team spirited. 
 - Meets Needs Improvement N/A
- Makes timely and appropriate decisions in the face of conflicting demands and interests 
 - Meets Needs Improvement N/A
- Is open, honest and trustworthy; able to acknowledge making a mistake. 
 - Meets Needs Improvement N/A
- Understands own weaknesses & limitations and works to improve upon them. 
 - Meets Needs Improvement N/A

Comments

I feel I continually seek input from colleagues and directors on ways to improve my performance.

↑
↓

96/2000

Note: If the notes area opens automatically when you select a rating for an item, it is required that you provide comments for that item.

4. Provide any additional notes necessary in the **Appraisal Comments** area.
5. Select **Save and Send** when finished.

Selecting **Save and Send** finalizes the appraisal and sends the form to your manager for review. You can no longer edit the appraisal after it is submitted.

You can access your appraisal form for review from the *Appraisals* page under the **My Folder** area.

Completing a multi-rater appraisal

Multi-rater appraisals allow managers to request employees to rate other employees on their performance.

Responses are viewable by the manager that assigned the appraisal and the HR department. The employee for the appraisal is able to view the ratings and comments left by multi-raters, but are unable to view which employee left those comments unless a name is indicated in the comments themselves.

When you are assigned a multi-rater appraisal, a **MultiRater Appraisal** task appears in your tasks list. There is often a due date listed by which you need to complete the appraisal.

These steps take place from the *Tasks* page under **My Folder**.

1. In the Tasks table, locate and select the **MultiRater Appraisal** task. This opens a confirmation page.

2. Click **Yes** on the confirmation page to continue to the appraisal form.

Note: Clicking **No** indicates that you wish to opt out of the multi-rater appraisal. You are taken back to the *Tasks* page, and the **MultiRater Appraisal** task no longer appears in your task list.

3. Review each item on the appraisal form and provide a rating based on your opinion of the employee's performance.
4. You may provide notes on individual items in the form by clicking the notes icon (🗨️) for an item. This opens a large text field for you to enter additional comments on the appraisal item. However please note that in order for your comments to be saved, you must choose or enter an evaluation option.

Note: If the notes area opens automatically when you select a rating for an item, it is required that you provide comments for that item.

5. Provide any additional notes necessary in the **Appraisal Comments** area.
6. Click the **Save and Send** button when finished.

Clicking **Save and Send** finalizes the appraisal and sends the form to the employee's manager for review. You can no longer edit the appraisal once it's submitted.

Reassigning Appraisals

Appraisal tasks can be reassigned to other users in the event the assigned user is unable to complete the appraisal due to being out of the office or other time constraints. Reassigning an appraisal creates a task for the selected user to complete the appraisal, and removes the task for the current user.

To reassign an appraisal, select the *Reassign Appraisal* option after clicking the desired appraisal task from the tasks list. A page opens that provides an area to search for and select a user for the reassigned appraisal task.

Rejecting Appraisals

At any point during the appraisal process (before a PDF document is generated), managers and routing users are able to reject appraisals. Rejecting an appraisal sends it back to a user (either the employee or the employee's manager) where it appears in their task list in order for them to make necessary changes.

Since rejecting an appraisal removes all existing signatures from the appraisal, it needs to be re-routed for approval.

To reject an appraisal, click the **Reject** button at the bottom of the appraisal form. You are required to add comments explaining why it was rejected so users can make necessary updates to the appraisal.

Recognition and Remarks

Recognition and Remarks is a commenting system that allows employees to send input to other employees about a recent exchange or behavioral observation at any time - not just when requested or during annual review periods. This 24/7 approach to input allows people to respond immediately and honestly while everything is fresh on their mind so they're able to include specific details in their comments and help compile a more accurate view of employee performance.

Comments left for an employee can be associated with specific organizational and/or corporate values in order to provide even more context to the nature of the employee behaviors that inspired the unsolicited comments.

To help encourage employees to provide open and honest input regarding colleague activities, a feature setting provides an option to send input anonymously, which simply hides the name of the sender of the comments from the recipient.

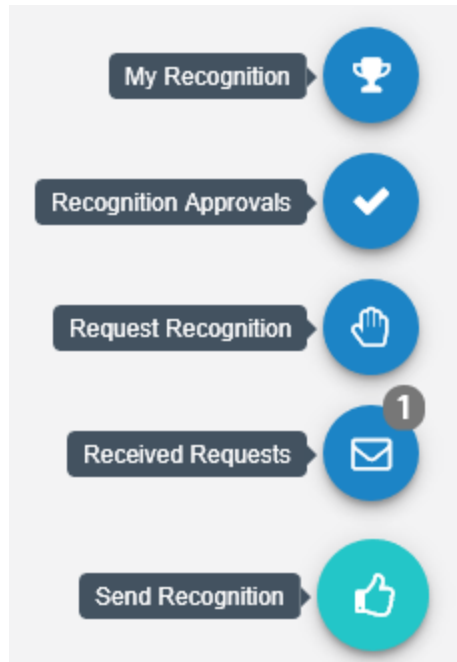
Once the comments are sent, recipients are able to view the input left for them in Performance Manager. Recognition is saved in the employee profile, so both employees and managers are able to review the full history of received recognition.

Tip: If the [Employee Journal](#) is enabled, you can access your *Journal* page from its icon in the lower-right. Depending on your system's settings, it may either be grouped in with the **Recognition and Remarks** feedback options, or displayed independently.



Where can I find Recognition and Remarks?

Recognition and Remarks is located on the *Tasks* page as an icon in the bottom-right corner. Hovering your cursor over the icon expands the menu to show all the available options.



- [My Recognition](#). Displays all of your received recognition.
- [Recognition Approvals](#). For managers only; displays a list of recognition sent to your employees anonymously.
- [Request Recognition](#). Allows you to send a request for input from specific employees.
- [Received Requests](#). Lists any requests for input you have received from colleagues.
- [Send Recognition](#). Opens the form used to send recognition to a colleague.

Note: Available options in the menu are controlled by system settings and permissions, so you may not have access to all the listed features.

About the Recognition form

The Recognition and Remarks form provides fields for selecting employees, associating specific values, and general comments for feedback.

Note: Due to the highly configurable nature of the Recognition and Remarks feature, you may notice differences in some verbiage and screenshots shown here.



Send Recognition

Did you have a great experience with one of your employees or colleagues? Let them know!


Select an employee



Thomas Joseph
Nurse
Nursing at General Hospital

With which corporate value(s) does this recognition align?

Tell us a little more about what makes him or her so great.

83 / 10000

 Send anonymously

- **Select an employee.** Search field for locating the employee for your feedback. This is a type-ahead field that automatically displays employee names that match after three characters have been entered.

Tip: See an **Advanced** button in your employee search field? That means you can [send recognition to multiple employees at once!](#)



- **Corporate values.** Drop-down list that allows you to make multiple selections for any organizational/corporate values to assign to the feedback.
- **Comments.** Text field for entering your comments for the employee.
- **Send anonymously.** This option allows you to [send your feedback anonymously](#), which simply hides name of the sender from the receiving employee. The recipient's manager must approve all anonymous feedback before it is shown to the employee.

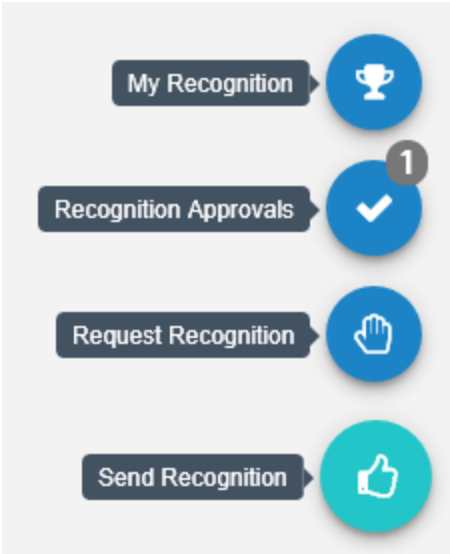
Anonymous Recognition

Recognition and Remarks includes an option to send input to a colleague anonymously. This simply hides the name of the sender from the recipient. Anonymous recognition helps promote open and honest feedback amongst employees who otherwise might be hesitant to leave either positive or constructive comments for a fellow employee.

Send anonymously

Sending feedback anonymously hides your identity from the recipient and their manager (system administrators can still see who sent feedback). The recipient's manager must approve the feedback before it is sent to the employee.

Anonymous recognition must be approved by the recipient's manager (who is also unable to view the name of the sender) before it can be viewed by the recipient. Managers receive a notification via email and in the icon menu on the *Tasks* page on the *Recognition Approvals* option.



Managers can either **Approve** or **Reject** the anonymous recognition.

✕

Recognition Approvals

Please review the anonymously submitted Recognition(s). If approved, the Recognition will be sent to the recipient. The sender will not be notified that the Recognition was rejected.

To: Thomas Joseph
Great job with the audit last week!
7/11/2017 at 12:05 PM

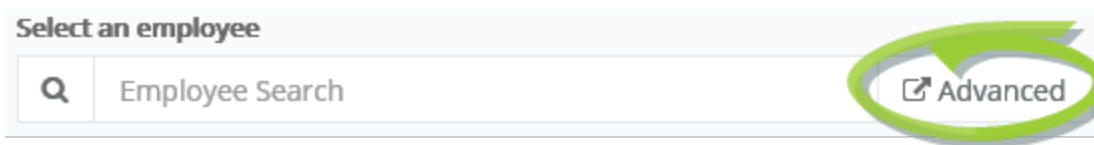
Do It

Batch Recognition

Recognition and Remarks helps build a complete, accurate profile of employee performance by allowing colleagues to leave feedback at any time about specific observed behaviors. But what about those times when a group of people go above and beyond to ensure organizational success?

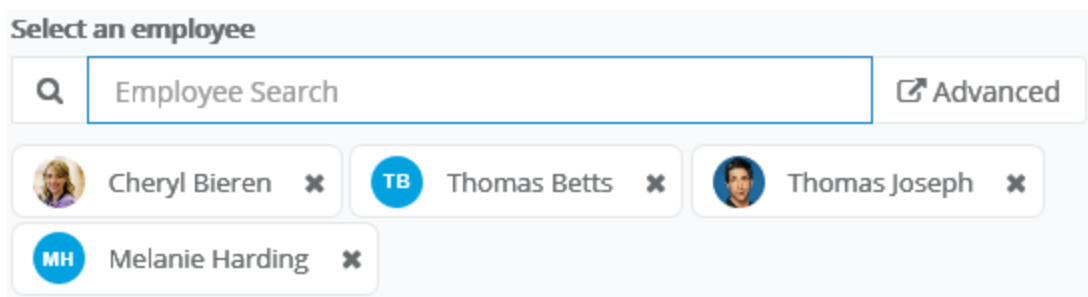
Batch recognition has you covered. This allows you to select multiple employees or an entire department, facility, even job position for your comments. This sends your input to everyone at once, saving you time as you deliver recognition to the group.

Sending batch recognition is easy too: when enabled, you'll notice an **Advanced** button in the employee search field of the *Send Recognition* pop-up window. This indicates you can select multiple employees for your input.



There's two ways to add multiple employees:

- **From the employee search field.** As you begin typing into the search field, a list of matching employees is displayed. Clicking on an employee adds them to the recognition. Then just begin typing the next employee's name to add, and select them from the list. Repeat until all the desired employees have been added.



- **Click the Advanced button.** Clicking **Advanced** opens the employee picker, which allows you to browse employee lists as well as select specific facilities, departments, and/or positions. Simply check the desired areas,

click **Add Selected/All** to move them to the *Selected* area, and click **Confirm**.

Add employees, positions, departments, and/or facilities ×

Filter

Selection type

Employee Facilities, departments, and positions

Choices

- Charge Nurse (CN0002)
- Nurse (RN0001)
- Nurse Manager (NM0004)
- Nurse Supervisor (NS0003)

Selections

- Charge Nurse (CN0002) Po
- Nurse (RN0001) Po
- Nurse Manager (NM0004) Po

Browse organization

- [-] All Facilities
 - [+] Anytown S. Living (ASL)
 - [-] General Hospital (AMC)
 - [-] **Nursing (8801)**
 - Charge Nurse (CN0002)
 - Nurse (RN0001)
 - Nurse Manager (NM0004)
 - Nurse Supervisor (NS0003)
 - [+] HealthcareSource (0001)
 - [+] Non Employees (NE001)
 - [+] Seaport Medical Center (SMC)
 - [+] The HealthcareSource Job Description Library (0000)

Batch recognition even allows you to include a combination of employees and facilities/departments/positions. The icons for each indicates their type.



Requesting Recognition

You can use Recognition and Remarks to request input from specific employees at any time. Employees receiving a request for input have the option to accept or decline the request.

1. Select the *Request Recognition* option from the icon's menu on the *Tasks* page.
2. Complete the form that opens in the pop-up window. You can select multiple employees for the request.



Request Recognition

Ask co-workers to provide feedback on a recent interaction or overall experience they may have had with you.

Who would you like to request feedback from?

Employee Search

SA Sam Allen **MH** Mark Henry

Send them a message

Hello colleague! Please provide me with your feedback to help me grow professionally!

85 / 10000

Request

Cancel

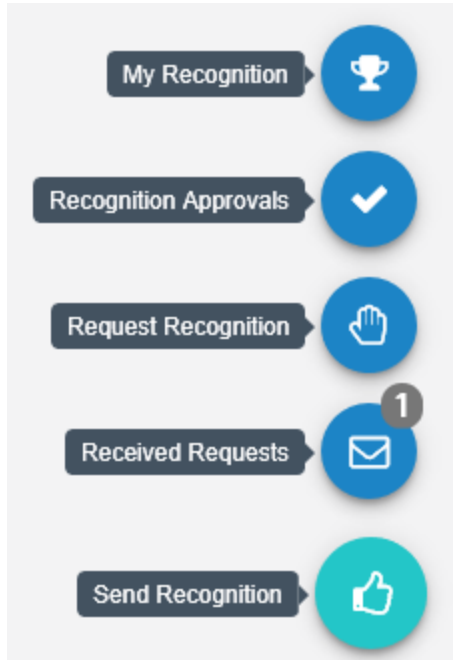
3. Click **Request**.

Selected employees receive an email notification when the request is sent (if the email notification option is enabled), and the icon on their *Tasks* page displays a number to indicate they have a request waiting.



Responding to Recognition requests

Recognition and Remarks provides the ability to request input from specific employees. Employees receiving such requests are notified via email and on the Recognition icon on the *Tasks* page.




Clicking the *Received Requests* option from the menu opens a pop-up window that lists all the requests you have received from other employees.



Received Requests

Review and respond to feedback requests from colleagues.

 From: Thomas Joseph
Hello colleague! Please provide me with your feedback to help me grow professionally!
7/13/2017 at 11:32 AM

Accept Decline

Close

Each request has the option to **Accept** or **Decline** the request for input. Accepting a request opens the [Send Recognition form](#) for you to complete for the employee. Declining a request simply removes it from your list.

Sending Recognition

Sending recognition to a colleague is designed to be a quick and easy process to encourage employees to share thoughts and comments as often as possible.

1. Select the *Send Recognition* option from the icon's menu on the *Tasks* page.
2. Complete the [send recognition form](#) that opens in the pop-up window.



Send Recognition

Did you have a great experience with one of your employees or colleagues? Let them know!

Select an employee



Thomas Joseph
Nurse
Nursing at General Hospital

With which corporate value(s) does this recognition align?

Tell us a little more about what makes him or her so great.

83 / 10000

 Send anonymously

3. Click **Send**.

The selected employee receives an email notification when the recognition is sent (if the email notification option is enabled), and the icon on their *Tasks* page displays a number to indicate they have new feedback.



Tip: Depending on how your Recognition and Remarks feature is configured, you may be able to [send recognition to multiple employees at once](#).

Viewing Recognition

Comments from colleagues is only helpful if you're able to view their input, so we've made it easy to view all the recognition you've received from fellow employees.

When you receive new recognition, the icon on the *Tasks* page displays the number of new items for you to view.




Selecting the **My Recognition** option from the icon's menu opens a pop-up window that lists all your received recognition in chronological order.



My Recognition


Here's what your colleagues have said about you.

Unread Show All



Thanks for the info on mainlines the other day!

Cheryl Bieren
7/10/2017 at 11:22 AM Share It



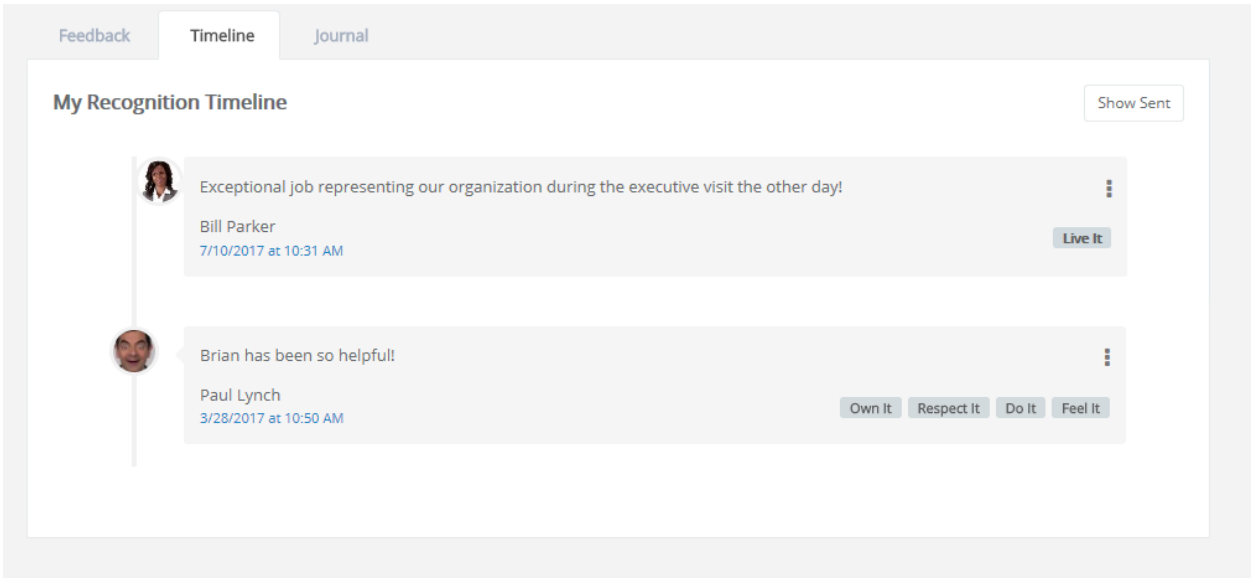
Exceptional job representing our organization during the executive visit the other day!

Bill Parker
7/10/2017 at 10:31 AM Live It

Done

If you have new items to view, those are shown separately. Clicking **Show All** displays all of the recognition items you have received to date.

You can also access a listing of all your recognition items on the *Feedback* page under **My Folder**. The **Timeline** tab on this page shows the same list of received items.



Additionally, the **Show Sent** button displays a list of all the recognition you sent to other employees.

Checklists

Checklists provide a way to assess employees on basic skills that relate to their positions in your organization. Whereas Assessments and 360 Reviews are intended to evaluate an employee's attitude, workplace contributions, and professional achievements, checklists are provided for the purpose of measuring the employee's skill level and ability in performing specific tasks such as drawing blood or inserting an IV line. Simply put, checklists assess to what degree they *can* or *can not* successfully perform a task.

Lists of specific skills is created and assigned to individual positions in Performance Manager. A checklist schedule is created (by an administrator) that assigns a checklist task to managers. This task requires them to evaluate their employees on the skills for their competency checklist.

Employees can also be assigned self-assessment tasks for checklists, allowing them to evaluate themselves on the necessary skills, and share the assessment with their manager.

Checklists can contain multiple skills, but not all skills on a checklist need to be completed at the same time. Checklist items can be evaluated when possible, and the checklist saved for completion at a later date.

Once all items on a checklist have been completed, the entire checklist can be closed. Closed checklists are stored as a PDF in the employee profile, and the employee is then assigned a sign-off task.

Users with a **Validator** role are able to complete individual skills for an employee, along with the employee's manager, but only the manager is able to close the entire checklist and complete the task.

About the Checklists form

The form used for checklists contains fields for evaluating employees on specific skills.

The form itself is organized in groups of skills. Each group heading contains a number that indicates how many skills require validation under that heading. When all the skills have been completed for a group, the number becomes a green checkmark.

▼ Cardiovascular	4
Clinical	✓
▼ Pulmonary	✓

Required fields on the form are indicated with an asterisk (*) next to the field name.

Rating	Rating scale used to evaluate the employee's performance of the selected skill. Rating scales may differ from skill to skill depending on how they are set up for your organization.
Validation	Determines how the skill was evaluated.
Population	Determines the population that was used to evaluate the skill.
Assessment Date	The date the skill evaluation was performed.

Comments Text field for general comments about the employee's performance on the selected skill.

Completing skills

Skills are used to validate an employee's ability to perform skills necessary for their job positions. Checklists can contain many skills for evaluation, though not every skill needs to be evaluated at once.

Checklists can be completed by opening a Checklist task from the *Tasks* page, or by visiting the *Validate* page under **Employees** and selecting an employee to evaluate from the table.

Users in a Validator role are able to complete individual skills on a checklist (along with the employee's manager); however, only the manager is able to close the entire checklist and complete the task.

To complete a checklist once the checklist form is open:

1. Locate the desired skill to evaluate from the list in the form. Skill group headings can be expanded to display the skills themselves, and clicking these sub-items opens that skill.
2. Complete the skill evaluation form as necessary.
3. When finished with the form, click the **Complete This Item** button to finalize your evaluation of the employee for that skill.
4. Repeat steps 2 and 3 for other skills you wish to evaluate.

Clicking the **Complete This Item** button for individual skills marks selected skill as complete and closes it. While you can view closed skills, you are not able to make any further edits on a skill once it has been completed.

The **Save This Item** button saves your work on the current skill for completion at a later date.

Self assessments











Self assessments for checklists are exactly what you might think they are: a chance for employees to rate themselves on the skills contained within a checklist. Employees are assigned a **Checklist - Self Assessment** task that requires them to complete a checklist


Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department
Checklist - Self Assessment	Mad cow evaluation checklist	04/01/2016	Colwell, Christian	Colwell, Christian	Administrative Systems Analyst	Administration

The employee view of the checklist is the same as managers and validators. They have the opportunity to select a **Rating**, **Validation**, and **Population** for each skill, and provide additional comments if desired.

Once completed, employee responses in the checklist are viewable by managers and validators working in the checklist. A little person icon next to the assessment fields indicates the employee's selection, and their comments are shown at the bottom of the form as well.

Assessments:

<p>* Rating:</p> <p><input checked="" type="radio"/>  Performs competently & independently</p> <p><input type="radio"/> abcd</p> <p><input type="radio"/> Rating Item with Comments Not Required</p>	<p>* Validation:</p> <p><input checked="" type="checkbox"/>  Direct Observation</p> <p><input checked="" type="checkbox"/>  Peer evaluation</p> <p><input type="checkbox"/> Simulation/Return Demonstration</p> <p><input type="checkbox"/> Patient/Customer Feedback</p> <p><input type="checkbox"/> Documentation</p> <p><input type="checkbox"/>  Testing</p> <p><input type="checkbox"/>  Policy Review</p>	<p>* Population:</p> <p><input type="checkbox"/> Infancy: Birth to 1 year</p> <p><input type="checkbox"/> Toddler: 1-3 years</p> <p><input type="checkbox"/> Preschool: 3-5 years</p> <p><input type="checkbox"/>  School Age: 6-12 years</p> <p><input checked="" type="checkbox"/>  Adolescent: 13-17 years</p> <p><input checked="" type="checkbox"/>  Adult: 18-64 years</p> <p><input checked="" type="checkbox"/>  Geriatric 65 yrs +</p> <p><input type="checkbox"/> Non Clinical</p> <p><input type="checkbox"/>  Clinical</p>
--	--	--

*** Assessment Date:** 

Status: Incomplete

Comments:

Proficient and unfaltering in execution of described skill. Three snaps in a Z formation.

90 / 5000

Self Assessment Comments: Plenty of experience with this skill, no problem.

Completing a self assessment

Self assessments for checklists can be completed by opening the **Checklist - Self Assessment** task from the *Tasks* page

To complete a checklist once the checklist form is open:

1. Locate the desired skill to evaluate from the list in the form. Skill group headings can be expanded to display the skills themselves, and clicking these sub-items opens that skill.
2. Complete the skill evaluation form as necessary.
3. When finished with the form, click the **Complete This Item** button to finalize your evaluation of the employee for that skill.
4. Repeat steps 2 and 3 for other skills you wish to evaluate.

Clicking the **Complete This Item** button for individual skills marks selected skill as complete and closes it. While you can view closed skills, you are not able to make any further edits on a skill once it has been completed.











The **Save This Item** button saves your work on the current skill for completion at a later date.

Sign Off task

Checklist - Sign Off tasks are assigned to employees after their manager closes a checklist. This task provides employees the opportunity to review completed checklists and provide sign off.

Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department
Checklist - Sign Off	Mad cow evaluation checklist: Colwell, Christian	04/01/2016	Colwell, Christian	Colwell, Christian	Administrative Systems Analyst	Administration

Launching the task opens a read-only view of the checklist, which displays both the employee's self-assessment ratings (if one was assigned) – in the form of those little person icons again – along with the manager/validator responses. Comments from everyone are also shown for each skill in the checklist.

<p>* Rating:</p> <p><input checked="" type="radio"/>  Performs competently & independently</p> <p><input type="radio"/> abcd</p> <p><input type="radio"/> Rating Item with Comments Not Required</p>	<p>* Validation:</p> <p><input checked="" type="checkbox"/>  Direct Observation</p> <p><input checked="" type="checkbox"/>  Peer evaluation</p> <p><input type="checkbox"/> Simulation/Return Demonstration</p> <p><input type="checkbox"/> Patient/Customer Feedback</p> <p><input type="checkbox"/> Documentation</p> <p><input type="checkbox"/>  Testing</p> <p><input type="checkbox"/>  Policy Review</p>	<p>* Population:</p> <p><input type="checkbox"/> Infancy: Birth to 1 year</p> <p><input type="checkbox"/> Toddler: 1-3 years</p> <p><input type="checkbox"/> Preschool: 3-5 years</p> <p><input type="checkbox"/>  School Age: 6-12 years</p> <p><input checked="" type="checkbox"/>  Adolescent: 13-17 years</p> <p><input checked="" type="checkbox"/>  Adult: 18-64 years</p> <p><input checked="" type="checkbox"/>  Geriatric 65 yrs +</p> <p><input type="checkbox"/> Non Clinical</p> <p><input type="checkbox"/>  Clinical</p>
--	--	---

To complete the task, simply review the checklist and provide any additional comments in the available text box, then click **Sign**. A PDF of the checklist is created and saved to the employee profile. That PDF shows the same information as the form – feedback from both employee and manager/validator.

Refuse to Sign

A **Refuse to Sign** option is available that provides employees with the ability to refuse to sign off on a completed checklist.

When this option is enabled for an employee, an additional **Refuse to Sign** button is available at the bottom of the checklist form when performing their **Checklist - Sign Off** task. Clicking this button sends the checklist to the manager without signing off.

Employees can still leave **Comments** even if they refuse to sign off on the checklist. Any text entered into the **Comments** field is displayed to the manager.

Signature

Name	Laurel White
Date	5/4/2016
Comments	<div style="border: 1px solid black; padding: 5px;"> <p>I don't agree with this assessment.</p> </div> <p>35 / 1000</p>

I understand that my electronic signature carries the same legal weight and authority as my written signature.

When an employee refuses to sign off on a checklist, the form is sent back to their manager as a **Refused to Sign: Checklist** task. Managers are required to review the form and sign off to complete the task. The Signature section of the form notes that the employee selected the **Refuse to Sign** option for the checklist, and displays any comments left by the employee.

Feedback

Feedback provides a way for managers to evaluate and inform employees of their performance and create action plans. Feedback is also a way to increase interaction between managers and employees, ensuring performance is on par with expectations and potential. The *Feedback* page is where you can send any praise, instruction, or warnings, via the Feedback form. Complete the form, then select the desired routing option to officially submit your feedback.

HCS Nonintegration (STAGE DATA) Add Feedback - Colin Moss Employee Search

Feedback

Instructional Text for Coaching feedback (Read Only)

* Date Of Occurrence: Not applicable

* Type:

* Notification:

* Position:

* Title:

Situation / Task: [Suggested Text](#)
 Colin generally does good accounting work, but occasionally puts a decimal point in the wrong location or adds an extra zero.
 126 / 3000

Action Taken: [Suggested Text](#)
 I spoke with Colin and told him to relax and take a closer look at his payroll statements before he sends them for processing.
 126 / 3000

Expected Result: [Suggested Text](#)
 We should see fewer "10x paycheck" deposits.
 44 / 3000

Comments:
 0 / 3000

Associate a Document:
 (To upload additional files [click here](#))

* Discussed With Employee:

* Due Date: ⓘ

Revisit: ⓘ

Coaching Feedback Disclaimer text (Read Only)

To access the *Feedback* form for a specific employee, navigate to your *Employee List*. Locate the desired employee in the list, then select **Feedback**, found under the *Add* drop-down menu. This displays the *Feedback* page.

The screenshot displays the 'Brian's Abernathy's Direct Reports' page. At the top, there's a navigation bar with 'My Folder', 'Employees', 'Job Description', 'Reports', 'Admin', and 'Support'. Below this, a breadcrumb trail shows 'HCS Nonintegration (STAGE DATA) / Employee List'. The main content area has a search bar with 'an' and radio buttons for 'Direct reports' (selected) and 'All reports'. A table lists employees with columns for 'Employee', 'Employee File', and 'Settings'. The 'Employee' column shows names and initials (CC, AJ, PK, AL, ML, 5M). The 'Employee File' column has 'View' and 'Add' buttons. The 'Settings' column has icons for account status and sign-off. A dropdown menu is open for the 'Add' button, listing options: Note, Feedback (highlighted), Development Goal, Document, Succession, Send Survey, and Development Plan. At the bottom, there are status messages: 'Employee is not registered.', 'Account Unlocked/Locked', and 'Refuse to sign enabled/disabled'.

Feedback types

There are three types of feedback:

- **Positive.** Used to praise employees for quality work efforts.
- **Coaching.** For those occasions when an employee requires additional training or instruction. Coaching isn't necessarily negative feedback; rather, an opportunity to improve.
- **Corrective.** Used when an employee has performed poorly, disregarded policies, etc. Corrective feedback is required to be reviewed by Human Resources before it is sent to the employee.

Employees receiving feedback from their manager are assigned a task to review and comment on the feedback. Managers then review employee comments and sign off, at which point a PDF of the feedback is added to the employee's record.

Note: Employees may *respond* to feedback issued by their managers, but they can not *initiate* feedback to their managers.

Feedback status

The status of a feedback item helps identify where it is in the workflow process.

- **Pending.** Feedback has been created by manager, but not sent to employee or routed.
- **Routed.** Manager has sent the feedback to a routing user for approval.
- **Routing Approved.** Routing has been completed and the feedback is with the manager to complete the routing by sending it to the employee.
- **Employee Review.** Feedback has been sent to the employee for review.
- **Manager Review.** Employee has either signed the feedback with comments or rejected the feedback.
- **Closed.** Task/workflow is complete.

Feedback Routing Options

Send for Review. Submits the feedback to any applicable stakeholders (i.e. Managers) for their review and further action.

Send to Employee. Submits the feedback to the Employee for their own review and further action.

Save. Saves the feedback form as a draft, but does not submit it.

Refuse to Sign

A **Refuse to Sign** option is available that provides employees with the ability to refuse to sign off on feedback left by their manager.

When this option is enabled for an employee, an additional **Refuse to Sign** button is available at the bottom of the feedback form when performing their **Review Feedback** task. Clicking this button sends the feedback to the manager without signing off.

Signature

Name	Christian Colwell
Date	3/6/2017
Comments	<div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>
	0 / 1000

I understand that my electronic signature carries the same legal weight and authority as my written signature.

Employees can still leave **Comments** even if they refuse to sign off on the feedback. Any text entered into the **Comments** field is displayed to the manager.

When an employee refuses to sign off on feedback, the form is sent back to their manager as a **Refused to Sign: Feedback** task. Managers are required to review the feedback form and sign off to complete the task. The Signature section of the form notes that the employee selected the **Refuse to Sign** option for the feedback, and displays any comments left by the employee.

Signature

Name	Christian Colwell
Date	3/6/2017
Comments	I don't agree with what was said about my punctuality and attendance. Let the record state I think this evaluation is a bundle of malarkey.
	139 / 1000

I understand that my electronic signature carries the same legal weight and authority as my written signature.

Reviewing Feedback (employee)

A Feedback task is created for employees receiving feedback from their manager. This task requires the employee to review, comment, and sign off on the feedback.

1. Click the link for the feedback task in the **Tasks** table. The feedback form opens.
2. Review the comments left by the manager.
3. In the Signature section, enter any comments necessary into the **Comments** text box. These comments are visible to the manager that left the feedback.

Signature

Name	Christian Colwell
Date	3/6/2017
Comments	
	0 / 1000

I understand that my electronic signature carries the same legal weight and authority as my written signature.

4. When finished review and commenting on the feedback, click the **Sign** button.

Clicking the **Sign** button signs off on the feedback and sends it back to the manager for review. Managers are then required to review any comments left by the employee and sign off on the form. Feedback is then added to the employee's record.

Reviewing Feedback (routing user)

A task is created for users that have been selected to review feedback left for an employee. This task requires the user to review, comment, and sign off on the feedback. It is then returned to the manager for review, then sent to the employee.

1. Click the link for the feedback task in the Tasks table. The feedback form opens.
2. Review the comments left by the manager.
3. Make any necessary edits to the form.

Note: The ability to edit routed feedback forms is controlled by system-wide settings. You may not have the ability to edit the form, only comment and sign off.

4. In the **Correspondence** section, review the manager comments and add any additional comments in the **Response Comments** field. Comments left in this field are only viewable by the manager, not the employee.

Correspondence

From:	Mahendra Manager
To:	Big Boss
Comments:	Sheri's lunch breaks have been getting more and more out of hand. Action is needed.

From:	Big Boss
To:	Mahendra Manager
Response Comments:	I agree. Set something up and speak with her, and let me know if things change one way or another.
	98 / 500

Corrective Feedback Disclaimer text (Read Only)

5. When finished review and commenting on the feedback, click the **Complete Routing** button.

Clicking the **Complete Routing** button signs off on the feedback and sends it back to the manager for review. Managers can then send the feedback to the employee for review.

Document Sign Off

The Document Sign Off feature provides a way for organizations to route specific documents, such as organizational policies, to employees for review and acknowledgment.

The feature runs on schedules that assign tasks to employees, just like other performance activities like appraisals and 360 reviews. Once documents are reviewed and acknowledged by the employees, the signed documents are listed in the Signed Documents table on the *Documents* page in employee profiles.

Assigning documents to be signed must be handed by an Admin user, using Document Review Schedules to assign document review tasks to individual users, users in a particular role, new hires, or other applicable user groups. When a document review schedule has been assigned, it appears as a task on the user's *Task List*.

Signing off on Documents

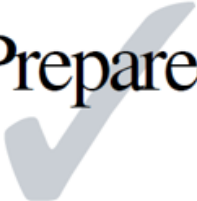
When a Document Sign Off schedule activates, tasks are immediately sent out to the employees. Selecting this task from the Tasks table opens a new page that displays the document that requires review, along with a Signature area containing the employee's name, the current date, and a **Sign** button.


Clicking **Sign** acknowledges that the employee has reviewed the document, and marks the task as complete. The document is then stored in the employee's record under **My Folder** on the *Documents* page.

HealthcareSource / Document Signoff - Tab Lane

TORNADO • FLASH FLOOD • EARTHQUAKE • WINTER STORM • HURRICANE • FIRE • HAZARDOUS MATERIALS SPILL

Emergency Preparedness Checklist





American Red Cross

Mile High Chapter

The next time disaster strikes, you may not have much time to act. Prepare now for a sudden emergency.

Learn how to protect yourself and cope with disaster by planning ahead. This checklist will help you get started. Discuss these ideas with your family, then prepare an emergency plan. Post the plan where everyone will see it—on the refrigerator or bulletin board.

For additional information about how to prepare for hazards in your community, contact your local emergency management or civil defense office and American Red Cross chapter.

Emergency Checklist

Call Your Emergency Management Office or American Red Cross Chapter

- Find out which disasters could occur in your area.
- Ask how to prepare for each disaster.
- Ask how you would be warned of an emergency.
- Learn your community's evacuation routes.
- Ask about special assistance for

- Discuss what to do about power outages and personal injuries.
- Draw a floor plan of your home. Mark two escape routes from each room.
- Show family members how to turn off the water, gas and electricity at main switches when necessary.
- Post emergency telephone numbers near telephones.
- Teach children how and when to call 911, police and fire.

Prepare a Disaster Supplies Kit

Assemble supplies you might need in an evacuation. Store them in an easy-to-carry container such as a backpack or duffle bag.

Include:

- A supply of water (one gallon per person per day). Store water in sealed, unbreakable containers. Identify the storage date and replace every six months.
- A supply of non-perishable packaged or canned food and a non-electric

Signature

Name	Tab Lane
Date	8/5/2015

I understand that my electronic signature carries the same legal weight and authority as my written signature.

If you're a system administrator and need to schedule a document review task, please refer to the [Document Schedule Administration](#) page for additional details.