Talent Management and Acquisition Training
Performance Management

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Upon logging into the Talent Management system, the first screen is called the Dashboard. It is the HOME page for this system. The Dashboard provides a central location, giving you easy access to information and tasks that are essential to your work. It is where most navigation of the system will begin.

The following pages will provide further detail to each section of the Dashboard. The different sections, or widgets, on the Dashboard each play a role in navigating the system with ease.
About Me Widget

The About Me widget provides a central location to access many of an Associate’s most important data including their Talent Profile, Journal, Goals and Performance information. Also from this task bar, you can send or review Recognition notes.

Profile:

The Profile icon, when selected, will provide access to a wealth of information on the Associate by launching the Talent Profile, which will be discussed later in more detail.
Journal:

The Journal function allows you to create and save notes about yourself or any Associate who reports to you. The function gives you the ability to establish who can view the entry besides you. This can be used throughout the year to make notes on the Associate’s performance/accomplishments. You can review your notes prior to completing their performance appraisal.

Using the drop down feature, select the Associate

Visibility is assigned by the creator of the note.

The creator also has the option to assign a category.

Once a note is written, you have the ability to perform spell check!
Goals:

From here, you can view the goal plan. You can also cascade goals to your direct reports as well as look at individual goals for any of your direct reports.

In order to cascade a goal to an Associate, you must first add the goal to yourself. You can do this from the Dashboard by selecting the Goals icon. The above screen is displayed. Selecting the plus sign next to Add a goal opens the below screen allowing you to enter information related to the goal.

The Cascade option also appears in the top left portion of the goal entry screen. By selecting this option you are able to select the Associates you wish to cascade the goal to.
Using this icon launches your evaluation within the system. However, it also allows you to search for your direct reports evaluations. This will enable you to see which state of the workflow they are currently in. If the review is in the completed state, you will be able to view it until HR closes out all reviews for the year. When this occurs, you will need to access the historical evaluation from the Talent Profile.
Recognition allows you to view notes sent to you as well as gives you the opportunity to send notes to others. Recipients of a Recognition note will receive an email notification, letting them know they have received kudos. This feature can also be used during the 90 Day Face to Face meetings where Associates are asked who has helped them be successful.

To send Recognition

Select ‘Send Recognition Note’
Select the icon next to ‘Associate’ to select the recipient.

An easy way to find an Associate is to RUN FILTER. This helpful tool can be used in many instances throughout the system. You have the option, in this case, to filter on the Associate’s name, position title or leader.
There is the option to categorize the note as a Recognition or Coaching opportunity.
Notes can be tied to a specific Essential Function (called Competency) of the Associate. If you elect ‘Select Competency’ in the header of the note, a list of the Associate’s essential functions will be visible for selection.

After you have completed your note to the Associate, remember to use the spell check feature! An email will be sent to the Associate letting them know that they have received Recognition from you.
To review a Recognition Note

Click on the ‘View Recognition Note’ (accessed from the Recognition tab on your Dashboard)

From here you can view notes you have received as well as notes you have sent to others.
From the My Company widget, leaders can view a list of their direct reports and link to more details about each Associate in their hierarchy. In addition, Leaders can navigate up and down their reporting structure.

Selecting one of your direct reports will give you the option to view their talent profile, their goals, evaluations, etc. By selecting them, a “mini” Talent Profile is launched.
Status of Active Processes

The Status of Active Processes widget gives leaders a snapshot view of a Review Plan workflow and how many Associate’s are in each state.

Leader’s can view each Review Plan by using the drop down option to the right of ‘Process’. The state will only appear if you have an Associate in that workflow.

My Tasks

The system automatically generates tasks that appear in the My Task widget. These tasks are next steps the leader must complete to move an Associate to the next State in a Review Process. It is the detail behind the snapshot view provided in the Status of Active Process. Selecting a task will launch that portion of the Associate’s review. However, My Tasks only shows up to 5 tasks. In order to see additional tasks you must use the Tasks link at the top of the Dashboard page.
The Explore widget is a central location from which any user can access a variety of resources to assist with Navigating the application and specifically the Talent Management module.

**Menu Bar – Top of Screen**

The double green arrows icon provides a Main Menu. From here you can navigate to information on your team or on the organization, goals, Associate’s performance appraisals and Associate’s Talent Profile.
Selecting the My Team section allows you to navigate to the above options. Those with the double data sheets in front of them indicate that there is another menu of options available that will open a Smart Grid allowing you to run reports.

Selecting the Position section allows you to navigate to the above options. Those with the data sheet in front of them indicate the ability to open a Smart Grid allowing you to run reports.
Selecting the Goals section opens the Individual and Organizational Goal sub-menus. From here you are able to open Smart Grids allowing you to run reports. You are also able to work on your Associate’s goals by using the Goal Management option.
Performance

Selecting the Performance section allows you to navigate to the above options. Those with the double data sheets in front of them indicate that there is another menu of options available that will open a Smart Grid allowing you to run reports.

Reports

Selecting the Reports section allows you to navigate to the above options.
Selecting Talent Profile from the menu, launches the Talent Profile main page giving you the above options.

**Personal Information:** Brings up Name and Contact Information on you and your Direct Reports

**Current Position & Organization:** Shows Position information, location within organization and employment dates on you and your Direct Reports.

**Performance:** Shows recent and past performance evaluation information.

**Recognition:** Allows you to view Recognition Notes received by you or your Direct Reports.

**Journal:** Allows you to view entries you have made for your Direct Reports. You are also able to view notes created by your Direct Reports as long as they have allowed visibility for you.

Returning to the Top Menu Bar:

The icon that looks like a house will bring you back to your Dashboard, or the home page, from anywhere in the system.

Selecting the Org Chart icon will provide a robust Organizational chart of your department. You then have the ability to drill up to view the Hospital’s organization that includes your leader, and further up to your leader’s leader.

The Task List icon takes you to a list of tasks to be completed. It serves the same purpose as My Tasks but can be accessed from anywhere in the system. It also allows you to view and sort your tasks when there are more than five.

The Reporting icon allows leaders to generate reports. Just like the menu option from the Double Down arrows, this icon allows you to Create New and/or Ad Hoc reports.
Performance Management Plans

Review Categories

We will address the reviews handled within the system using four categories, Introductory Reviews, Transfer Reviews, Annual Reviews and Performance Improvement Plans.

The most important thing to know is that the same information addressed on our current forms will continue to be covered on the electronic version. In the system, you will find this information contained in 5 different sections:

- **Goals** - Used to house Goals and 90 Day Conversation Questions for Transfers
- **Competencies** - Use to evaluate Essential Functions, SPIRIT Values, Checklist Topics, etc;
- **Talent Assessment** - Used to assess 6 categories of Talent Management (Flight Risk, Potential, Status, Promotability, Loss Impact and Retention Plan)
- **Overall** - Provides opportunity to comment on Strengths & Accomplishments, Areas of Improvement and Additional Comments. If present within the review, completion is required.
- **Signatures** - Allows for acknowledgement of review and provides opportunity for overall comments

The Performance Improvement Plan has not been finalized at this point. If an Associate does not successfully complete their 90 Transfer Evaluation, their 6 Month Introductory Period Evaluation or receives a Minimal Contributor or Partial Contributor Overall rating on their Annual Evaluation, an Action Plan will need to be created and maintained in paper format until further notice. Once the Performance Improvement Plan has been created in the system, the workflow and process information will be shared.
Performance Management Plans

Workflow States

**MultiRater Nominations** - Opportunity for Leader to request feedback from Peers, Subordinates, Management and Others on the performance of the Associate being evaluated.

Once an Associate has been added as a MultiRater you must also approve or reject your Nomination.

**Awaiting MultiRater Responses** - While waiting for MultiRater responses, Leaders can review individual evaluations and determine if they want to Accept, Exclude, Decline or Exclude From the Aggregate Rating.
At any point, you can decide to Complete any Pending Reviews and Proceed to the next state. This will cause any outstanding MultiRater reviews to no longer be accessible to the MultiRater. The Task will disappear from the MultiRater’s Dashboard and the form will no longer be accessible.

**Self Evaluation** - Associate completes assessment of performance over established timeframe. Depending on the Performance Plan, the responses could be Open Ended in the Comments box, a drop down option of Complete, Not Complete or our current 1 to 5 Rating Scale.

**Leader Evaluation** - Leader completes assessment of Associate’s performance over established timeframe. Depending on the Performance Plan, the responses could be a drop down option of Complete, Not Complete or our current 1 to 5 Rating Scale. The Leader will also have the ability to comment on the Associate’s Talent Assessment as well as provide open ended responses on the Associate’s Overall performance. Typically the latter must be completed. Leaders will not have the ability to see the Associate’s Self Evaluation until this state has been completed.

**Face to Face** – Also referred to as “Review Meeting”. During this state, the Associate’s Self Evaluation becomes available to the leader. Depending on the Performance Plan varying options exist. Leaders may be able to change ratings or add additional comments.

**Associate Sign Off** – During this state the Associate must acknowledge the final results of their evaluation. This state is present in the 6 Month and Annual workflows. While Associate will receive an email notification indicating that they need to do this, we encourage Leaders to monitor these workflows and remind Associate’s as needed. There is an option in the system to assist with this.

**Track Goal Progress** - Ongoing ability for the Leader and Associate to communicate via the system on Goal creation and progress. Notifications via email are sent when key fields within the Goal are changed.

**2nd Level Leader Review** – The form used for this state is exactly the same as the Leader Evaluation Form. During this state the 2nd Level Leader is encouraged to add comments in the Overall section of the evaluation. However, they will also have the ability to comment on each Goal and Essential Function or SPIRIT Value by making additional remarks in the Comments box.

**Completed** - The Completed workflow state is what the review looks like in its archived form. Once advanced to this state the review is added to the Talent Profile and therefore, can only be viewed by the Associate, the Associate’s Leader or others above this Leader.
Introductory Reviews

Department Orientation Checklist – 30 Day

Tips for Completing 30 Day:
- MultiRater Nominations, Self Evaluation and Awaiting MultiRater Responses can occur simultaneously
- Multirater Nominations screen gives you 4 options: Peers, Subordinates, Management and Others
- MultiRaters must be added and then approved in order for the request to be sent to them
- Evaluation will remain in Awaiting MultiRater Responses until the Leader has opted to Complete Pending Reviews and Proceed
- If leaders elect not to nominate MultiRaters, they can advance through the Awaiting MultiRater state once the Self Evaluation has been completed by selecting Complete Pending Reviews and Proceed.
- Leader will be able to view MultiRater responses while completing their review. Reminder: Associate Self Evaluation will not visible.
- Competency Section available for completion, called Checklist Items
- In the Comments box date completed should be entered
- Ratings are Complete/Not Complete
- During Face to Face, leader will have ability to make additional comments that may arise from discussion with Associate.
- Leader will not be able to Submit the Face to Face form unless all Checklist Items have been rated Complete. If a Checklist Item is determined to be Not Complete during the Face to Face Review, the Leader and Associate should discuss until both agree the rating can be updated to Complete. This should then be noted in the Comments box.
**90 Day New Hire Conversation**

**Tips for Completing 90 Day New Hire Conversation:**
- Leader will not have access to the form until Associate has fully completed and submitted their Self Evaluation.
- Self Evaluation consists of four questions requiring open ended responses.
- During Face to Face, Leader will have the ability to make additional comments that may arise from discussion with the Associate.
- Once in the Completed state, the review can be found under Recent Performance History/Past Performance History and Evaluation Processes. In Recent Performance History/Past Performance History the results of the review can be seen and the full review can be viewed by clicking on the glasses.
- **Recognition:** If the Associate recognized another Associate during this review, please return to Dashboard and send a recognition note while the Associate is still with you. Be sure Face to face has been submitted first.

**6 Month Review**

**Tips for Completing 6 Month Review:**
- Leaders will complete only one section, Evaluation of Performance, where you will address 4 questions using Complete/Not Complete responses.
- If a Not Complete response is selected, comments are mandatory.
- If a Not Complete response is chosen for the question: “Associate has successfully completed the Six Month Introductory Review Period”, a paper Action Plan needs to be created and sent to HR for review prior to the Face to Face meeting. Reminder this will become an electronic Performance Improvement Plan in the near future.
- During the Face to Face state, Leaders have ability to make additional comments that may arise from discussion with the Associate.
- During the Associate Sign Off state Associates will have the opportunity to add comments as they acknowledge review completion. Review will not move to the Completed state until the Associate has submitted their acknowledgement.
- If the Leader would like to see the comments made by the Associate, they can do so once in the Completed state by going to the Talent Profile.
- Once in the Completed state, the review can be found under Recent Performance History/Past Performance History and Evaluation Processes. In Recent Performance History/Past Performance History the results of the review can be seen and the full review can be viewed by clicking on the glasses.
Transfers

90 Day Transfer

Tips for Completing 90 Day Transfer:

- Leader will not have access to the form until Associate has fully completed and submitted their Self Evaluation
- Self Evaluation consists of four questions requiring open ended responses
- Leaders will complete only one section, Evaluation of Performance, where you will address 4 questions using Complete/Not Complete responses
- If a Not Complete response is selected, comments are mandatory.
- If a Not Complete response is chosen for the question: “Associate has successfully completed the Transfer/Promotion Review Period”, a paper Action Plan needs to be created and sent to HR for review prior to the Face to Face meeting. Reminder this will become an electronic Performance Improvement Plan in the near future
- During Face to Face, Leader will have the ability to make additional comments that may arise from discussion with the Associate
- Once in the Completed state, the review can be found under Recent Performance History/Past Performance History and Evaluation Processes. In Recent Performance History/Past Performance History the results of the review can be seen and the full review can be viewed by clicking on the glasses.
- **Recognition:** If the Associate recognized another Associate during this review, please return to Dashboard and send a recognition note while the Associate is still with you. Be sure Face to face has been submitted first.
Annual Evaluations


Tips for Completing Annual Review Goal Process:

- Goals can be added during the Track Goal Progress state.
- Leaders can individually assign goals by searching for the Associate and selecting Add Goal.
- Leaders can cascade goals by adding the goal to themselves and choosing the Cascade option.
- Throughout the year, all Goals will remain in this state allowing Leaders and Associates to provide updates and/or make changes. There are two options when communicating an update or change; Communicate Changes, Acknowledge Changes.
- Goals can exist in three different states: Pending, Active, Modified.
- An Annual Review can be completed with goals in the Track Goal Progress state.
- This workflow is only moved to the Completed by Human Resources state.

Tips for Completing Annual Review:

- Self Evaluation and Awaiting MultiRater Responses (MultiRater nominations) can occur simultaneously.
- MultiRaters must be added and then approved in order for the request to be sent to them.
- Evaluation will remain in Awaiting MultiRater Responses until the Leader has opted to Complete Pending Reviews and Proceed.
- If leaders elect not to nominate MultiRaters, they can advance through the Awaiting MultiRater state once the Self Evaluation has been completed by selecting Complete Pending Reviews and Proceed.
- Leader will be able to view MultiRater responses while completing their review.
- Associate’s Self Evaluation will not be visible to the Leader until the completion of the Leader Evaluation state.
- Leaders will be able to Bulk Rate Associates’ Essential Functions and SPIRIT values for all reviews residing in the same workflow state, Leader Evaluation.
- Leaders Evaluation cannot be submitted if a comment does not exist for a 1, 2, 4 or 5 rating. (Same as current process)
- During Face to Face, Leader will have the ability to make additional comments that may arise from discussion with the Associate. However, ratings cannot be changed.
- 2nd Level Leader form is the same as the Leader Evaluation form.
• While there is a special section for 2nd Level Leader comments in the Overall Section, if the 2nd level Leader wants to include comments on a specific Essential Function, Goal or SPIRIT value, they can share the comment box with the Leader.

• During the Associate Sign Off state Associates will have the opportunity to add comments as they acknowledge review completion. Review will not move to the Completed state until the Associate has submitted their acknowledgement.

• If the Leader would like to see the comments made by the Associate, they can do so once in the Completed state by going to the Talent Profile.

• Once in the Completed state, the review can be found under Recent Performance History/Past Performance History and Evaluation Processes. In Recent Performance History/Past Performance History the results of the review can be seen and the full review can be viewed by clicking on the glasses.
Glossary of Common Terms

Active Processes
Widget where Workflows are housed. It shows which Workflow state the Associate currently resides as well as all workflows that need attention. Multiple Workflows can be present in the Active Processes Widget at any given time.

Bulk Rating
Allows Leaders to record and review ratings for multiple Associates at one time. Applicable to Essential Functions and SPIRIT values only.

Cascading Goals
Ability to create “common goals” and mandate them to your Associate.

Competency
A job competency is the Essential Function from the Associate’s job description.

Dashboard
The HOME page for the system. It provides a central location from which most navigation will occur.

Evaluation Process
An evaluation process is the sequence in which an Associate’s competencies and performance against goals is measured.

Goal Setting Process
A goal setting process is the sequence in which an Associate and Leader establish the Associate’s goals for an evaluation process to measure against. The process comprises of Leader sets Goals, Associate reviews and accepts or suggests changes to goals, Associate signs off on established goals.

Performance Management Plan
For the Hospital’s purposes, there are several Performance Management Plans. They are:
- 30 Day New Hire (Department Orientation Checklist)
- 90 Day New Hire Conversation
- 90 Day Transfer
- 6 Month Evaluation
- Annual Evaluation (several varieties addressing each goal level)

Review Meeting
Same as Face to Face

Smart Grids
Smart Grids are customizable grid structures for displaying data. Smart Grids offer a number of options for easily organizing data. If an icon has a double set of data sheets in front, a Smart Grid is available to run data.
Talent Profile
The Talent Profile provides quick access to all Talent information on an Associate that is contained in the system. Everyone’s Talent Profile is accessible. However, varying degrees of information are available depending on the reporting relationship.

Talent Assessment
Ability to record Potential, Status, Promotability, Flight Risk, Loss Impact and Retention Information. Data is required during the annual evaluation and is posted to the Talent Profile. This information can only be accessed by the Associate’s Leader and their Leaders’ Leader.

Tasks
Actions within the system that need to be completed. There is a section on the Dashboard to keep you on track. Emails will be sent when a Task needs attention.

Widgets
Individual sections on the Dashboard. For example: About Me, My Tasks and My Company

Workflow
A workflow represents the order in which decisions are made and actions are performed to complete a Review process. It displays different states in which the review process can reside. The previous state must be completed before the next state can begin. Each state is represented with its own arrow. For most states, emails are generated to those involved in the state when it is initiated.