

Performance Management Terminology

- **Dashboard** – First page you see when logging in to PeopleClick Authoria. It is the HOME page for this system. Most navigation will occur from this page.
 - **Widgets** – Individual sections on the Dashboard. For Example: About Me, My Tasks and My Company
 - **Tasks** – Actions within the system that need to be completed. Section on Dashboard to keep you on track. Emails will be sent when a Task needs attention.
 - **Workflows** – Displays different states in which the review process can reside. Previous State must be completed before next state can begin. Each state is represented with its own arrow. When the majority of states are initiated and/or completed, a status email will be generated to those involved in that state.
 - **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.
 - **Talent Profile** – Area providing all Talent information contained within the system on Associates. 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 Leader's Leaders.
 - **Review Meeting** – Same as Face to Face
 - **Cascading Goals** – Ability to create “common goals” and mandate them to your Associates
 - **Bulk Rate** – Allows leaders to record and review ratings of multiple Associates at one time. Applicable to Essential Functions and SPIRIT Values only
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Department Orientation Checklist Workflow

MultiRater
Nominations

- Process Owner: Leader
- Responsibility: Select others to assist with completion of Checklist or close process

Self Evaluation

- Process Owner: Newly Hired Associate
- Responsibility: Indicate whether Checklist Items were completed

Awaiting
MultiRater
Responses

- Process Owner: Leader
- Responsibility: Can close process or send reminders to those assisting

Manager
Evaluation

- Process Owner: Leader
- Responsibility: Indicate whether Checklist Items were completed

Face to Face

- Process Owner: Leader
- Responsibility: Meet with Associate and confirm all Items were completed

Completed

- Process Owner: Human Resources
- Responsibility: Close out process

90 Day Conversation Workflow

Self Evaluation

- Process Owner: Newly Hired Associate
- Responsibility: Complete responses to four conversation questions

Face to Face

- Process Owner: Leader
- Responsibility: Review Associate's responses and send Thank Yous to those who helped make them successful

Completed

- Process Owner: Human Resources
- Responsibility: Close out process

90 Day Transfer Workflow

Self Evaluation

- Process Owner: Associate
- Responsibility: Respond to four questions

Manager Evaluation

- Process Owner: Leader
- Responsibility: Answer three questions with Complete vs Not Complete

Face to Face

- Process Owner: Leader
- Responsibility: Meet with Associate, review their responses and send Thank You Notes to those who helped them transition successfully

Completed

- Process Owner: Human Resources
- Responsibility: Close out process

6 Month Evaluation Workflow

Manager Evaluation

- Process Owner: Leader
- Responsibility: : Answer three questions with Complete vs Not Complete

Face to Face

- Process Owner: Leader
- Responsibility: Meet with Associate review with them your responses and comments

Associate Sign Off

- Process Owner: Associate
- Responsibility: Acknowledge via check box completion & provide comments if desired

Completed

- Process Owner: Human Resources
- Responsibility: Close out process

Annual Evaluation Workflow

Self Evaluation

- Process Owner: Associate
- Responsibility: Complete evaluation of Essential Functions, SPIRIT Values and Goals

Awaiting MultiRater Responses

- Process Owner: Leader
- Responsibility: Select others, if desired, to evaluate Associate's Essential Functions and SPIRIT Values

Manager Evaluation

- Process Owner: Leader
- Responsibility: Complete assessment of Associate (Essential Functions, SPIRIT Values and Goals)

Face to Face

- Process Owner: Leader
- Responsibility: Review evaluation results and comments with Associate

2nd Level Manager Review

- Process Owner: 2nd Level Leader
- Responsibility: Review evaluation and provide comments

Associate Sign Off

- Process Owner: Associate
- Responsibility: Acknowledge completion via a check box. Last opportunity for comments.

Completed

- Process Owner: Human Resources
- Responsibility: Close out process

Goal Setting Workflow 2011

Track Goal
Process

- Process Owner: Leader
- Responsibility: Input goals established during previous review

Complete

- Process Owner: Human Resources
 - Responsibility: Close out process
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Goal Setting Workflow 2012

Manager Sets Goals

- Process Owner: Leader
- Responsibility: During 2011 review, discuss and begin to establish 2012 evaluation goals

Employee Review

- Process Owner: Associate
- Responsibility: Review and accept or suggest changes to goals

Employee Sign Off

- Process Owner: Associate
- Responsibility: Acknowledge acceptance of goals via checkbox

Track Goal Progress

- Process Owner: Associate and Leader
- Responsibility: Periodically update goals with achievements or challenges

Complete

- Process Owner: Human Resources
- Responsibility: Close out process