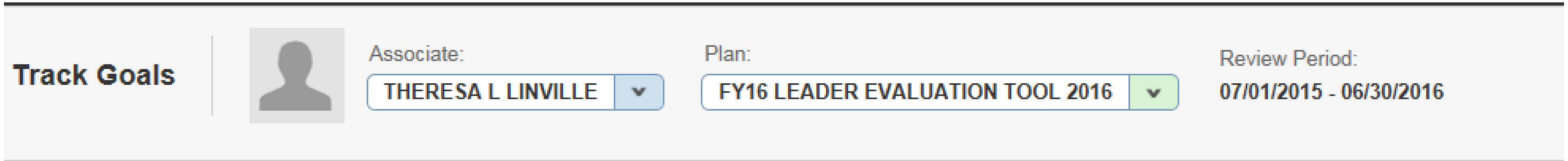
2016 PeopleFluent Refresher Training

Goal Setting – Individual Associate

- Click on GOALS from your Dashboard

- Select the associate



- Add Goal

For all plans, GOAL WEIGHTS must total 100%

Goal Setting – Multiple Associates

The goal must first be assigned to you as the Leader.

To access your goal page, click on GOALS from your dashboard.

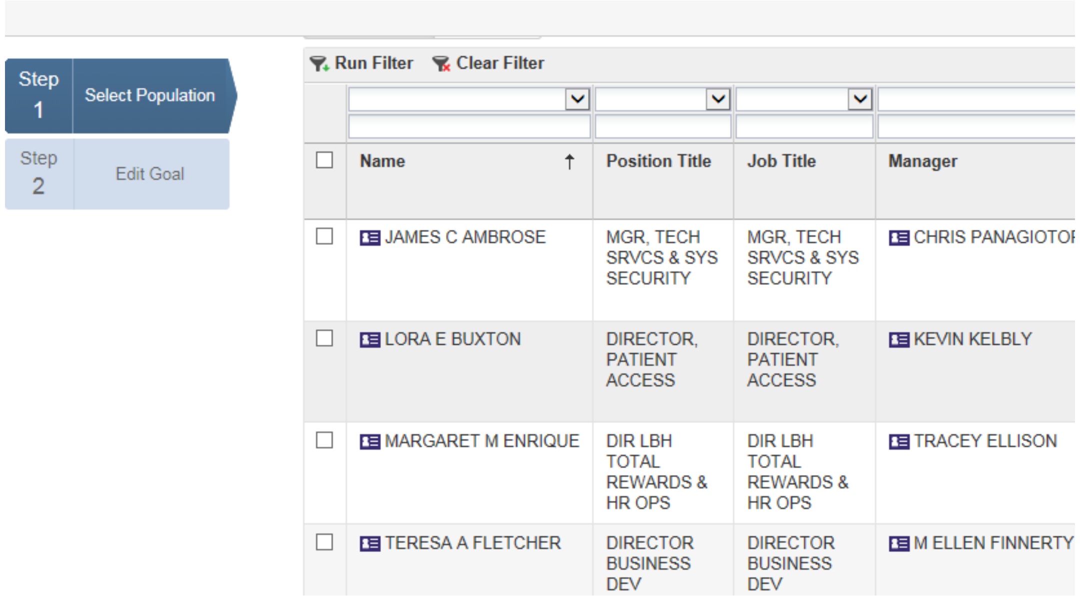
Select Plan and Goal to be Cascaded or Add a Goal.

Click on CASCADE next to the title of the Goal.

Goal Setting – Multiple Associates

This provides a list of associates to select from to assign the goal.

Once you've selected the population, click continue.



Goal Setting – Multiple Associates

You have the option to make changes to the goal for each plan level.

Once any changes are made, you must click SAVE to trigger the system to cascade the goals.

You must click on “Edit Goals for the Population” for each Plan Level.

Self Evaluation

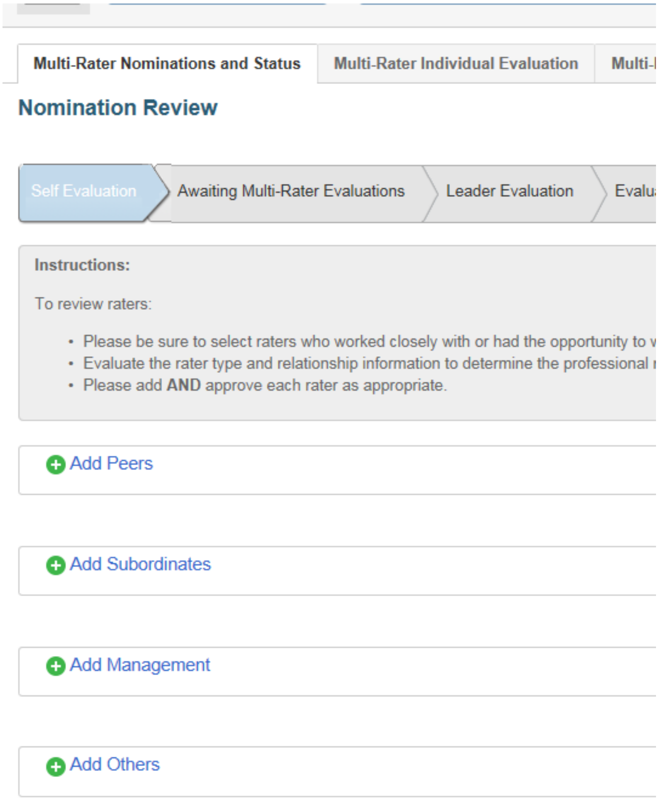
Associate completes assessment of performance over the established timeframe.

Comments are required for scores other than 3.

Multi-Rater Nominations

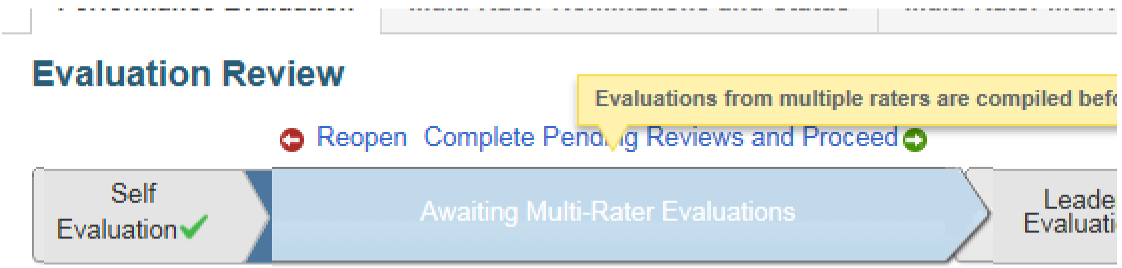
The categories provided for nominating a multi-rater are an easy way to organize the requests.

Click Add to assign a multi-rater to the evaluation



Multi-Rater Nominations

After you have selected all your multi-raters, if you've received some input and want to continue with the process or if you choose not to solicit information from others, click on "Complete Pending Reviews and Proceed".



This will move the evaluation to the next step.

Multi-Rater Evaluations

While waiting for Multi Rater 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. The Task will disappear from the Multi Rater's Dashboard and the form will no longer be accessible.

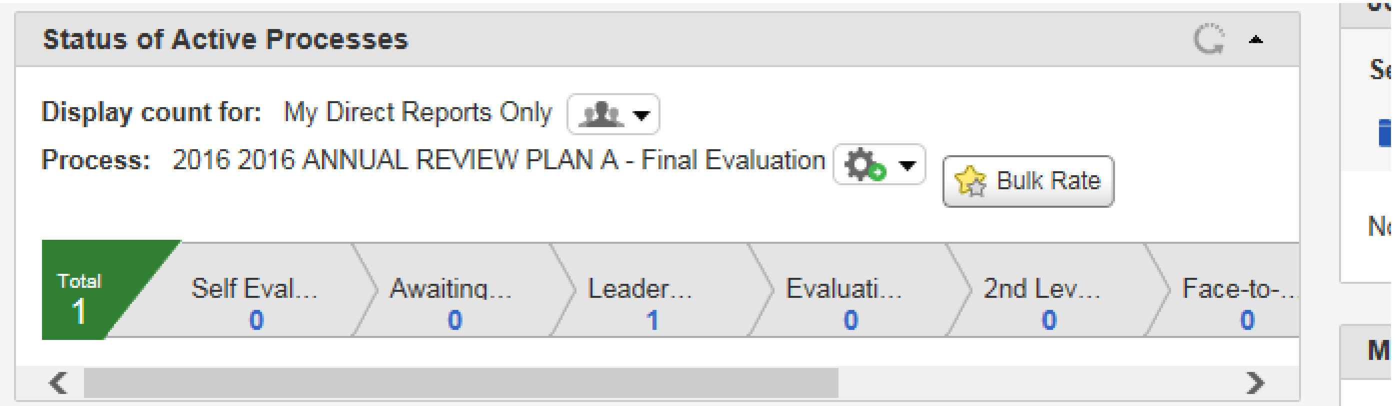
Leader Evaluation

Leader completes assessment of Associate’s performance over established timeframe. 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.

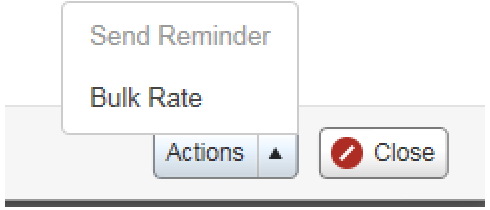
Leader Evaluation – BULK RATING

To evaluate a group of associates at once, you can bulk rate.

Under "Status of Active Processes", select plan, click on Leader Evaluation



Under Actions, click on BULK RATE



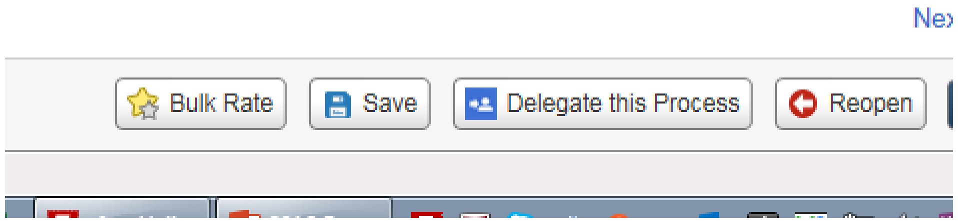
Leader Evaluation – BULK RATING

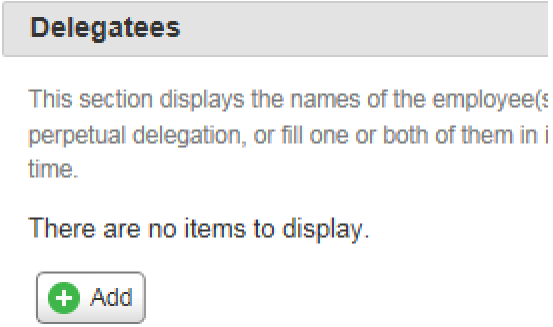
Click on Select an Essential Function or SPIRIT Value

Select the Essential Function and rate the Associates using the drop down box.

Delegation

Reviews can be DELEGATED to another Leader for completion. This could be used if you have a new transfer or you are a new leader. As the delegator, you remain responsible for the review and can view/provide input at any time.





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.

Face to Face

During this state, the Associate's Self Evaluation become available to the leader and is used for the meeting with the associate.

If you have an associate who is on the Clinical Ladder, you will review both evaluations **at the same time and Associates will have to sign off on both evaluations.**

The Merit Matrix will be published on the intranet by July 25, 2016.

Employee Talent Profile Review

While at this state, the Associate is encouraged to update work experience along with education, licenses and certifications. When completed, click the Submit button to move forward.

We have moved this from the beginning of the workflow. We ask that during the face-to-face you remind or help associates with this step so that it does not hold up the completion of the evaluation.

Associate Sign Off

During this state the Associate must acknowledge the final results of their evaluation. While Associates 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.

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 the Leader.

What Happens Next

- HRIS runs a report of completed evaluations
- HR Compensation double checks each report for accuracy
- Pay changes are uploaded into the system
- Payroll is provided a report for lump sums or retro payments

2016 Common Review

- The Review Process will open 7/25/2016 and remain open until 11/28/2016.
- The Common Review Date is 9/25/2016.
- Review your Status of Active Processes for each plan often. Send reminders/motivate Associates to keep the evaluation moving through the process.

REMEMBER – The evaluation must be signed by the Associate. It will remain OUTSTANDING until it is signed.

HARD STOP DATE

All reviews must be completed and processed by November 28, 2016 due to the system changes with the new year.

NO EXCEPTIONS!!!

Tips

- Self Evaluation and Awaiting Multi Rater Responses can occur simultaneously
- Multi Rater Nominations screen gives you 4 options: Peers, Subordinates, Management and Others (only you can see what option was picked)
- Evaluations will remain in Awaiting Multi Rater Responses until the Leader has opted to Complete Pending Reviews and Proceed
- Leader will be able to Bulk Rate Associates’ Essential Functions and SPIRIT values for all reviews residing in the same workflow state

Tips - Continued

- Self and Leader Evaluation cannot be submitted if a comment does not exist for a 1,2,4 or 5 rating
- 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
- 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

Tips - Continued

- 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 acknowledgment
- 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