

Performance Manager

Leader Guide





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Log-In Details

Visit: <https://pfm.healthcaresource.com/performance/wellforce>

Select the “Register” option on the page



Follow the registration instructions to create your account

Username will automatically be set to your employee ID

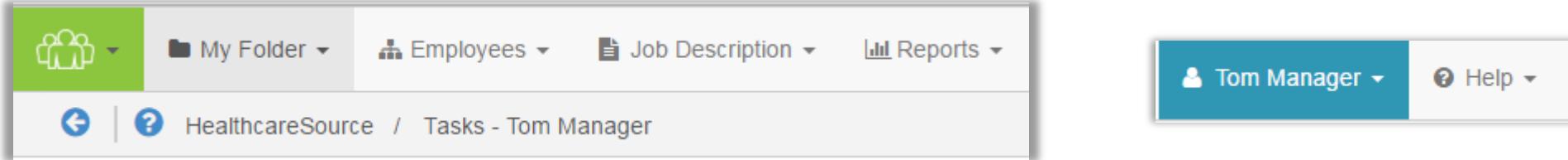
If you do not know your employee ID or if you have trouble logging in, please reach out to
HR@Wellforce.org



Leader Dashboard & Tasks



Leader Menu Options



My Folder:

- Specific to each employee user and provides access to electronic record

Employees:

- Allows manager users visibility to information for all direct reports

Job Description:

- View your employees job descriptions

Reports:

- Provides reporting capabilities for managers regarding their specific areas of responsibility



Dashboard & Tasks

The screenshot shows the Wellforce dashboard for Tom Manager, a System Manager for Supply Chain Data Management at Wellforce Inc. The interface includes a user profile, a task filter sidebar, and a main task list table.

User Profile: Tom Manager (Syst Mgr, Supply Chain Data Mg, Supply Chain at Wellforce Inc.)

Task Filter Sidebar:

- Task Types:**
 - Appraisal: In Progress (2)
 - Appraisal: Not Started (6)
 - Review Job Description (1)
- Due Date:**
 - Next 30 Days (3)
 - Past Due (6)

Task List:

Type	Task	Employee Name	Due Date	Position/Department Name
Review Job Description	Sign Job Description	Tom Manager	5/11/2020	Syst Mgr, Supply Chain Data Mg, Supply Chain
Appraisal: In Progress	Demo Appraisal Schedule	Bob Employee	5/31/2020	Manager of Communication, Admin-President
Appraisal: Not Started	Demo Appraisal Schedule	Jane Employee	5/31/2020	Manager of Communication, Admin-President
Appraisal: Not Started	Demo Appraisal Schedule	Michelle Employee	5/31/2020	Manager of Communication, Admin-President
Appraisal: In Progress	Demo Appraisal Schedule (rejected)	Sally Employee	5/31/2020	Manager of Communication, Admin-President
Appraisal: Not Started	Demo Appraisal Schedule	Michelle Employee	5/31/2020	Syst Mgr, Supply Chain Data Mg, Supply Chain

Alerts: 13 (orange button with bell icon)

Actions: (dropdown menu with icons for edit and message)

- The dashboard presents tasks that are due upon logging in
- Email notifications are automatically sent to users when a task is assigned to them
- 'Alerts' help managers stay on top of past due employee tasks

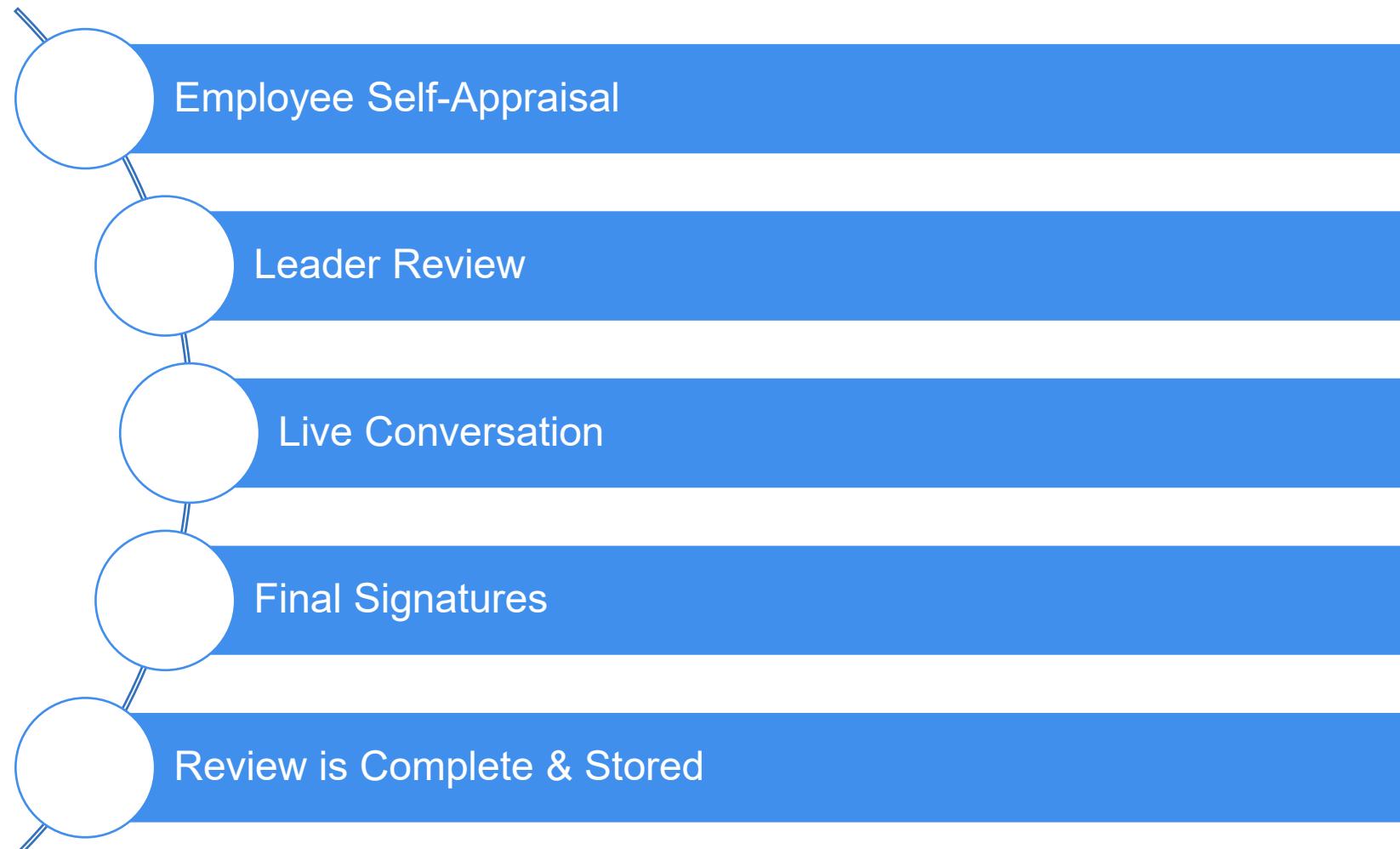


Performance Reviews

90-day Reviews and Annual Reviews



Performance Review Workflow



***Please wait until the employee self-appraisal is complete before starting the leader review.*



Performance Reviews

✓	Appraisal: In Progress	Demo Appraisal Schedule	Bob Employee	5/31/2020	Manager of Communication, Admin-President
Status	Type	Assigned To			Due Date
Complete	Self Appraisal	Bob Employee			5/17/2020
➤	Appraisal: Not Started	Demo Appraisal Schedule	Jane Employee	5/31/2020	Manager of Communication, Admin-President
➤	Appraisal: Not Started	Demo Appraisal Schedule	Michelle Employee	5/31/2020	Manager of Communication, Admin-President

Once the employee self-appraisal has been completed, the manager evaluation may begin

Look for tasks with a **green arrow**. This means that the self appraisal has been completed and is ready for the manager evaluation

- You will also receive an email notification once the employee completes a self-appraisal

Click on the task to begin the process



Performance Reviews

Select the appraisal action(s) you would like to take below:

Complete Manager Appraisal - Complete manager's appraisal of "Employee, Bob "

Due Date: 5/31/2020

Self-appraisal - Assign self-appraisal task to "Employee, Bob "

Select "Complete Manager Appraisal" and then "Continue" to begin the evaluation process

Manager of Communication

Demo Appraisal Schedule

First Name Bob

Last Name Employee

Position Code AA0067

Position Name Manager of Communication

Department Code 10324

Department Name Admin-President

Facility Name Wellforce Inc.

Manager Name Tom Manager

Employee Number BobEmployee

The fillable, one-page appraisal form will then open in your web browser



Performance Reviews

DUTIES & RESPONSIBILITIES

In order of importance, list essential areas of responsibility, major job duties, special projects and key objectives for this position. These items should be evaluated throughout the year and included in the written annual evaluation.

50%

A. Evolve the Wellforce message and its communications efforts as the system continues to grow

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

Employee Self-appraisal

Employee, Bob

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

B. Partner with communications leaders at Wellforce member organizations to identify and develop communications strategies and content.)

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

Employee Self-appraisal

Employee, Bob

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

- Employees are rated on job-specific responsibilities and professional standards
- Select the appropriate rating for each area
- The employee's self-appraisal feedback will appear in the blue boxes throughout the appraisal form



Performance Reviews

PROFESSIONAL STANDARDS 50%

Accuracy & Thoroughness
I deliver work that is thoughtful, strategic and carefully reviewed. I continuously identify opportunities for improvement for myself and for the organization.

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

Manager Comments
0/2000

Employee Self-appraisal
Employee, Bob
 Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

- Selecting an “Outstanding” or and “Unsatisfactory” rating will require you to leave a comment explaining why the employee is exceling in this area or needs improvement
- Optional comments can be added on other ratings by selecting the comment-box icon, next to the appraisal point



Performance Reviews

OVERALL RATING

Based on the scores above your overall rating is:

Outstanding Highly Effective Satisfactory Needs Improvement Unsatisfactory

- The system will select a suggested overall rating based off the average performance ratings in the review. You may override this if you choose

The above is intended to describe the general contents and requirements of work being performed by people assigned to this classification. It is not intended to be construed as an exhaustive statement of all duties, responsibilities or skills of personnel so classified.

RECOMMENDATION FOR PAY FOR PERFORMANCE INCREASE

Please recommend the increase based on employee's performance as documented in this evaluation.

Above 3% - requires VP approval
 3.00%
 2.75%
 2.50%
 2.25%
 2.00%
 1.75%
 1.50%
 1.25%
 1.00%
 0.75%
 0.50%
 No pay increase at this time

- If applicable, recommend an annual salary increase based on the employee's performance

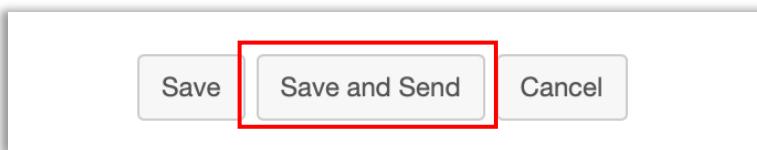


Performance Reviews

- Select “Save” to save the appraisal.



- To review the appraisal with your employee, open the saved appraisal task and select **“employee view”**
 - You can save the appraisal as a PDF, print or view on your computer



- Once you have met with the employee to discuss the evaluation, select “Save and Send” to finalize the appraisal and send back to the employee for signature.
- Once the employee signs, you will be required to sign off as well



Additional Performance Review Items

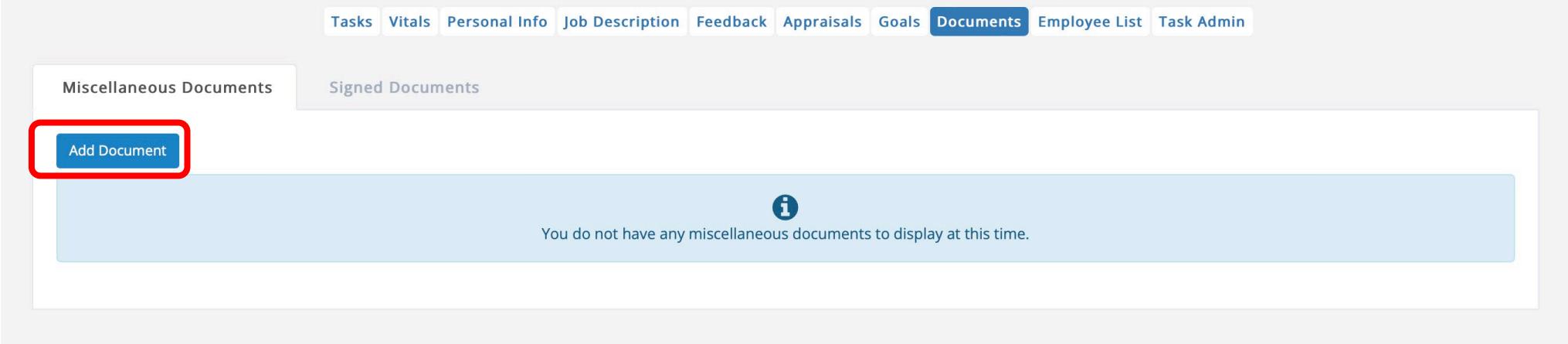
- **Electronic Cabinet:** completed appraisals are stored in the employee's electronic cabinet and can be accessed at any time by the employee, manager or HR
 - To access this information, visit the "My Folder" tab in Performance Manager
- **Language Checker:** Performance Manager will scan and flag potentially inappropriate language in appraisal comments
 - If the system flags your verbiage, please carefully review the comment to ensure that it is appropriate and adjust if needed
 - The verbiage flag is a "soft warning" and will not stop the appraisal from being completed or sent to the employee



Tools & Features



Document Upload

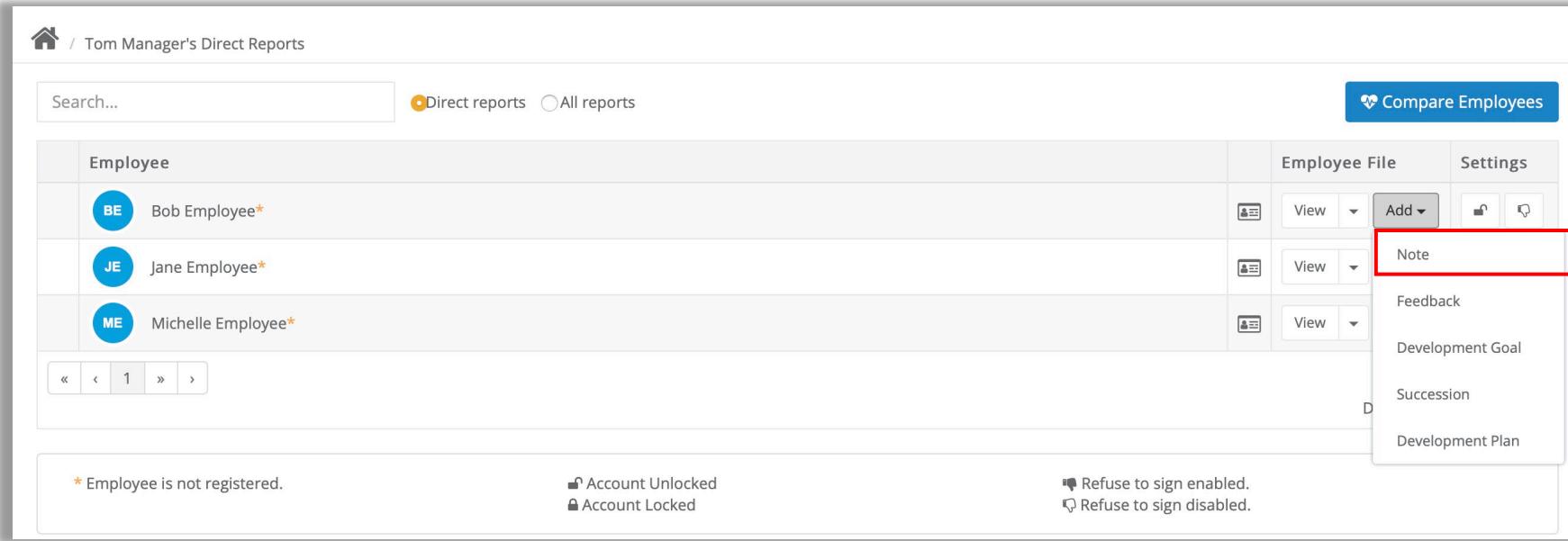


The screenshot shows a software interface for managing employee documents. At the top, there is a navigation bar with tabs: Tasks, Vitals, Personal Info, Job Description, Feedback, Appraisals, Goals, **Documents**, Employee List, and Task Admin. The 'Documents' tab is currently selected. Below the navigation bar, there are two tabs: 'Miscellaneous Documents' and 'Signed Documents'. The 'Miscellaneous Documents' tab is active. Inside this tab, there is a blue button labeled 'Add Document' which is highlighted with a red rectangular border. Below this button, there is a light blue information box containing the text 'You do not have any miscellaneous documents to display at this time.' with an information icon (a blue circle with a white 'i').

- To upload documents such as goals that are recorded outside of the system, select the employee from your employee list
- Then select the documents tab on the profile
- Lastly, select “Add Document” and choose the document that you would like to upload
- The document will be stored on the employee’s file and can be downloaded and reviewed at any time



Manager Notes



The screenshot shows a software interface for managing employee direct reports. At the top, there is a navigation bar with a home icon, the text 'Tom Manager's Direct Reports', a search bar, and buttons for 'Direct reports' and 'All reports'. To the right of the search bar is a 'Compare Employees' button. Below the navigation is a table titled 'Employee' with three rows: 'Bob Employee*', 'Jane Employee*', and 'Michelle Employee*'. Each row has a small circular icon with initials (BE, JE, ME) and a 'View' button. To the right of the table is a vertical menu with options: 'Employee File' (selected), 'Settings', 'View', 'Add', 'Note' (which is highlighted with a red box), 'Feedback', 'Development Goal', 'Succession', and 'Development Plan'. At the bottom of the interface, there are status indicators: 'Employee is not registered.' (with a note about account status), 'Account Unlocked' (with a note about refuse to sign), and 'Account Locked' (with a note about refuse to sign).

- Employee “Notes” can be used for internal notes that are not shared with the employee and are not directly sent to HR
- To add a journal entry about an employee, visit your employee list, select add under employee file and click “Note.”
- Notes are not visible to your employees, though they are discoverable by HR



Manager Notes

Add Manager Notes

Occurrence Date:

Title:

Manager Notes

Note:

B *I* U ~~S~~

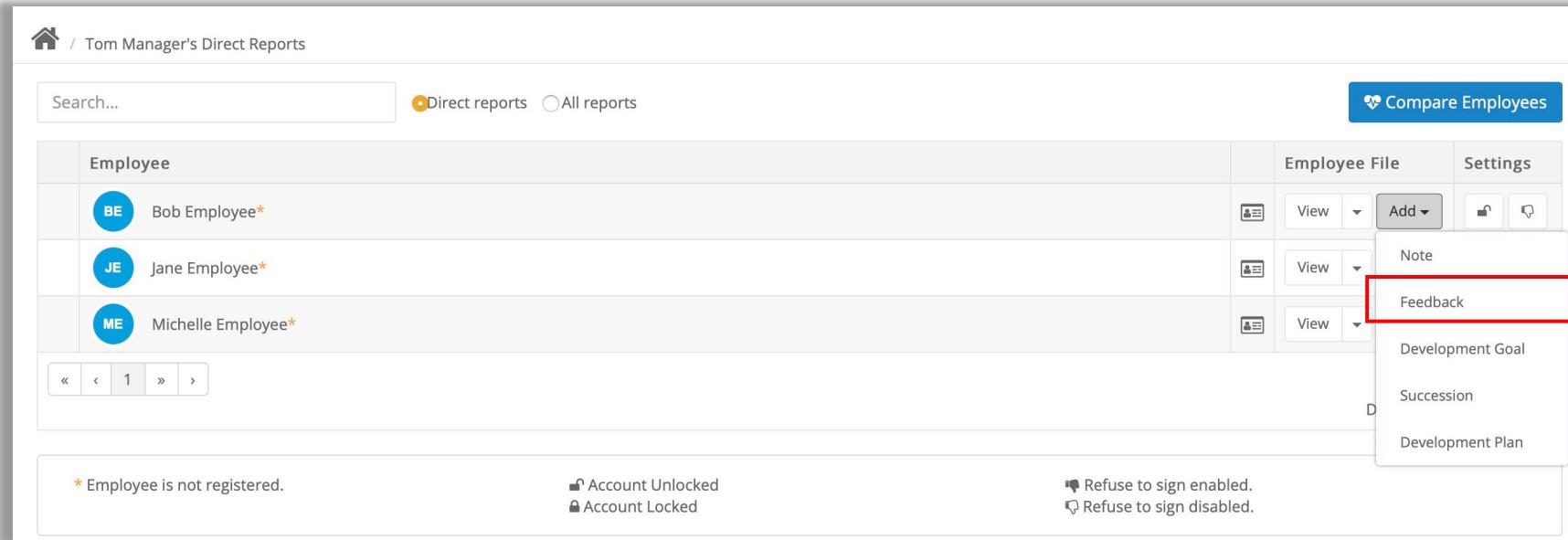
0 / 3000

Upload a Document:

Click here or drag and drop to upload a doc to this note



Feedback



The screenshot shows a software interface for managing employee direct reports. At the top, there is a navigation bar with a home icon, the text 'Tom Manager's Direct Reports', a search bar, and two radio buttons for 'Direct reports' and 'All reports'. To the right of the search bar is a 'Compare Employees' button. Below the navigation is a table titled 'Employee' containing three rows: 'Bob Employee*' (with icon BE), 'Jane Employee*' (with icon JE), and 'Michelle Employee*' (with icon ME). Each row has a 'View' button with a dropdown menu and an 'Add' button. The 'View' dropdown menu for the first row is open, showing options: 'Note' (disabled), 'Feedback' (highlighted with a red box), 'Development Goal', 'Succession', and 'Development Plan'. At the bottom of the table are navigation arrows and a note: '* Employee is not registered.' Below the table, there are status indicators: 'Account Unlocked' and 'Account Locked' on the left, and 'Refuse to sign enabled' and 'Refuse to sign disabled' on the right.

- Feedback is a way to provide positive, coaching or corrective feedback
- Corrective feedback is routed to HR for approval before being sent to the employee
 - Corrective feedback is not a replacement for formal discipline. Please see your HR team for more details.
- To submit feedback, visit your employee list, select add and then click feedback



Feedback

* Date Of Occurrence:	6/8/2020 <input type="button" value="Calendar"/>	<input type="checkbox"/> Not applicable
* Type:	Select Feedback Type <input type="button" value="▼"/>	
* Notification:	Select Feedback Notification <input type="button" value="▼"/>	
* Position:	Select User's Position <input type="button" value="▼"/>	
* Title:	Select Feedback Type First <input type="button" value="▼"/>	
Situation / Task:	<u>Suggested Text</u> 0 / 3000	
Action Taken:	<u>Suggested Text</u> 0 / 3000	
Expected Result:	<u>Suggested Text</u> 0 / 3000	
Comments:	 0 / 3000	
Associate a Document:	<input type="button" value="▼"/> (To upload additional files click here)	
* Discussed With Employee:	<input type="button" value="Calendar"/>	<input type="checkbox"/>
* Due Date:	<input type="button" value="Calendar"/>	<input type="checkbox"/>



Development Goals

The screenshot shows a software interface for managing employee development goals. The top navigation bar includes a home icon, the text 'Tom Manager's Direct Reports', a search bar, and buttons for 'Direct reports' and 'All reports'. A 'Compare Employees' button is also present. The main content area displays a table of employees with columns for 'Employee', 'Employee File', and 'Settings'. The 'Employee' column lists three employees: 'Bob Employee*' (with icon BE), 'Jane Employee*' (with icon JE), and 'Michelle Employee*' (with icon ME). The 'Settings' column for each employee includes a 'View' button, an 'Add' button, and a dropdown menu. The 'Development Goal' option in the dropdown for Bob Employee is highlighted with a red box. Other options in the dropdown are 'Note', 'Feedback', 'Succession', and 'Development Plan'. At the bottom of the page, there are status indicators: 'Employee is not registered.' (with a note icon), 'Account Unlocked' (with a key icon), 'Account Locked' (with a lock icon), 'Refuse to sign enabled.' (with a person icon), and 'Refuse to sign disabled.' (with a person icon). Navigation arrows at the bottom left indicate page 1 of 1.

- Development goals are desired achievements for employees to work on throughout the year
- To assign a development goal, visit your employee list, click add and then select development goal
 - Managers also have the ability to assign the same goal to multiple members of your team at the same time
- Goals can be individual, departmental or organizational



Development Goals

Add Goal

Created By	
Date Created	6/8/2020
Employee	BOB EMPLOYEE
*Type	Select Goal Type
*Title	
Details	
Measure	
*Due Date	<input type="text"/>

* Indicates Required Field

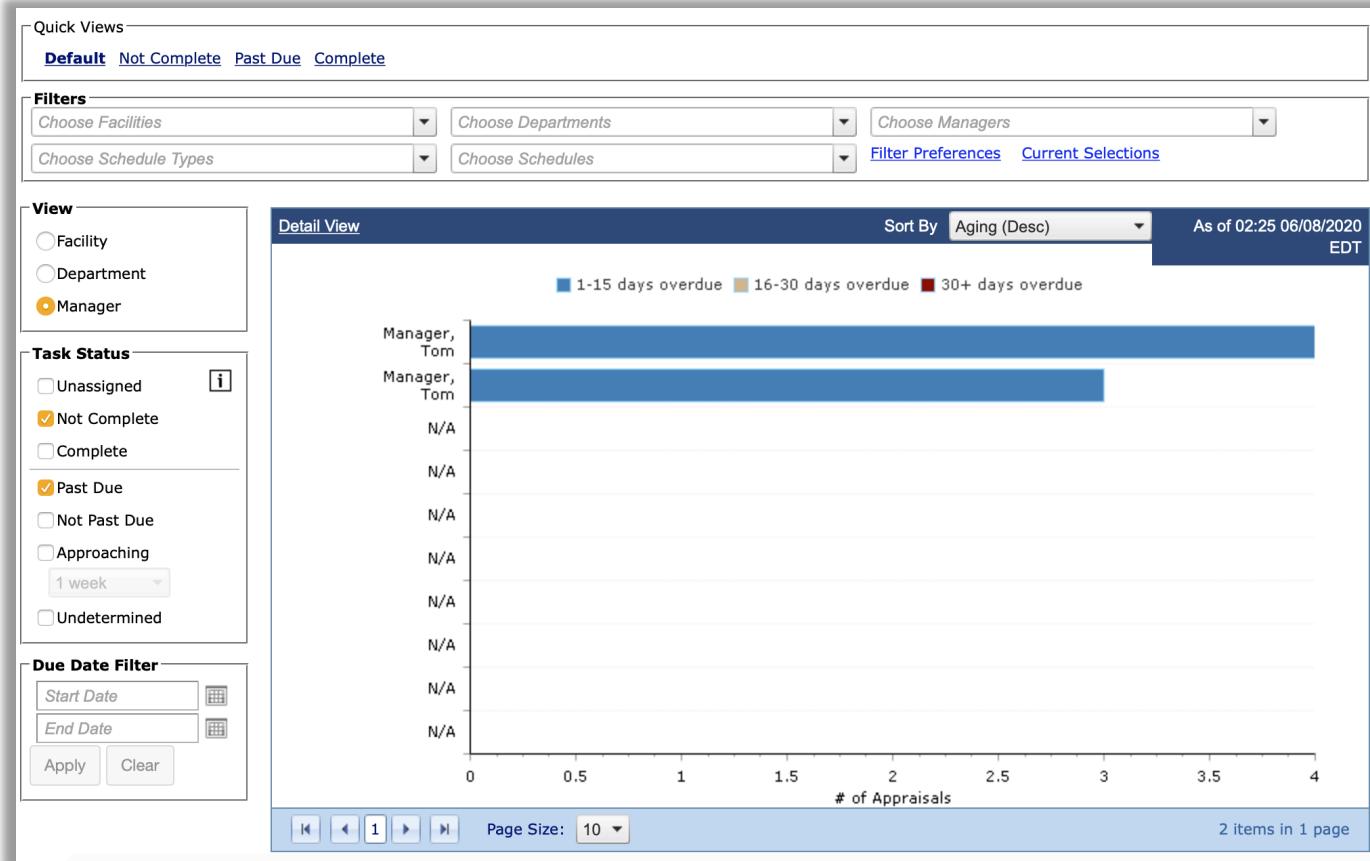
Save & Send

Save & Exit

Cancel



Reporting



Visit “appraisal status reporting” in the reporting tab for a customizable report that details the status of your employee’s annual reviews

Questions

Please contact: Kyle Walker,
kyle.walker@wellforce.org, with any
questions or requests for system
support.

