

# 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

HealthcareSource  
Performance Manager®

Username

Password

Log In ➔

[Register |](#) [Trouble signing in? ▾](#)

Follow the registration instructions to create your account

Username will automatically be set to your employee ID

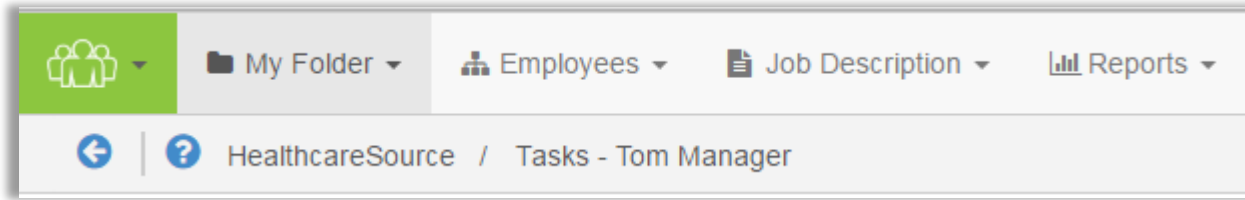
If you do not know your employee ID or if you have trouble logging in, please reach out to [HR@Wellforce.org](mailto:HR@Wellforce.org)



# 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 dashboard for Tom Manager, Syst Mgr, Supply Chain Data Mg, Supply Chain at Wellforce Inc. features a top navigation bar with a bell icon and 13 alerts. The left sidebar contains filters for Task Types and Due Date. The main area displays a 'My Task List' table with columns for Type, Task, Employee Name, Due Date, and Position/Department Name. The table lists tasks such as 'Review Job Description', 'Appraisal: In Progress', and 'Appraisal: Not Started' for various employees, with due dates ranging from 5/11/2020 to 5/31/2020. A search bar is located above the table, and an 'Actions' dropdown is in the top right corner of the table area.

**Filters**

**Task Types**

- ☐ Appraisal: In Progress (2)
- ☐ Appraisal: Not Started (6)
- ☐ Review Job Description (1)

**Due Date**

- ☐ Next 30 Days (3)
- ☐ Past Due (6)

**My 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

- 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

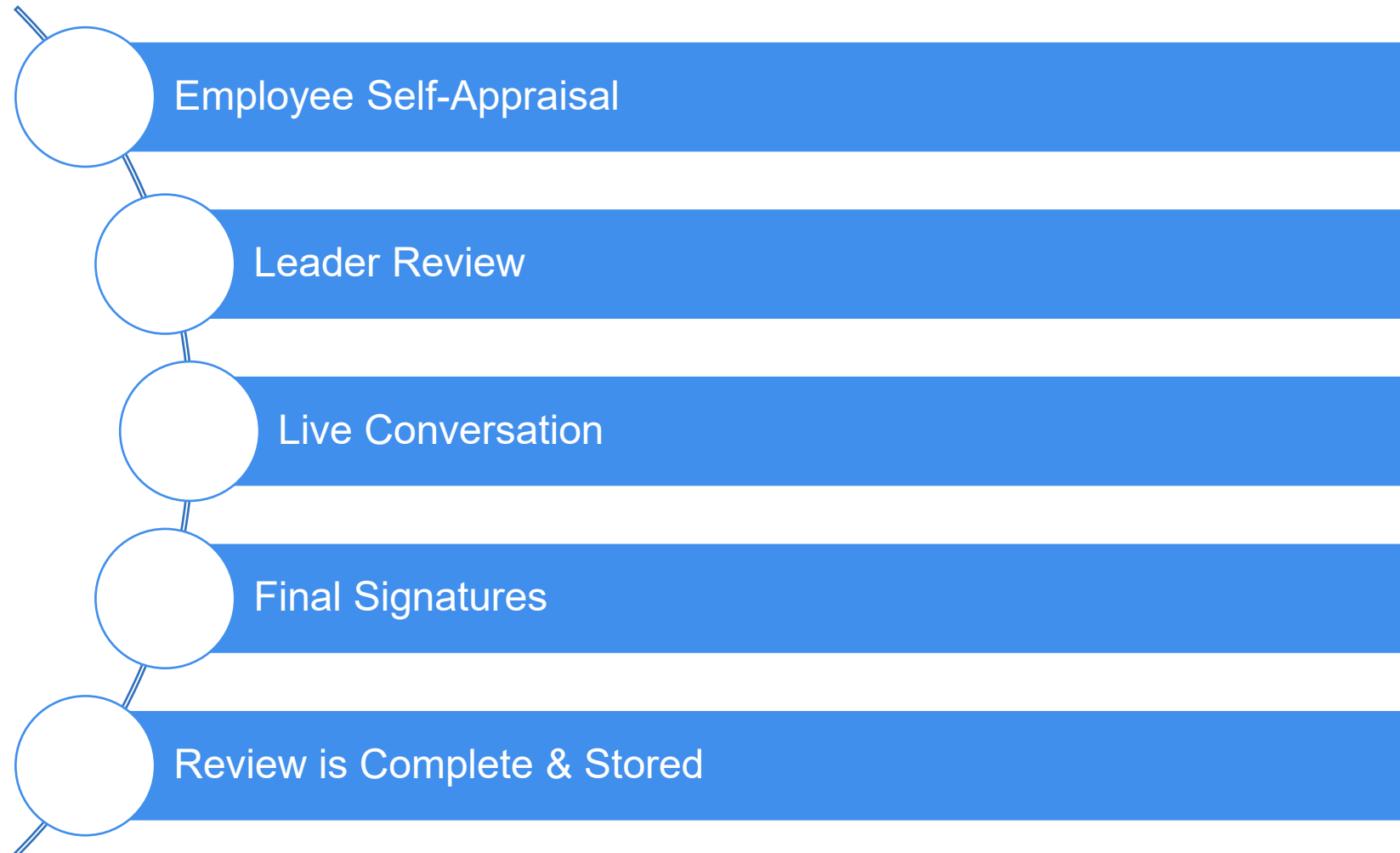


# Performance Reviews

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

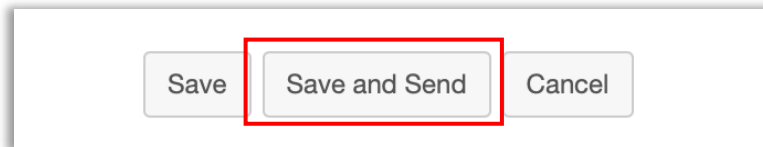


# Performance Reviews

- 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

Tasks Vitals Personal Info Job Description Feedback Appraisals Goals Documents Employee List Task Admin

Miscellaneous Documents Signed Documents

Add Document

**i**  
You do not have any miscellaneous documents to display at this time.

- 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 the 'Tom Manager's Direct Reports' page. At the top, there is a search bar and radio buttons for 'Direct reports' (selected) and 'All reports'. A 'Compare Employees' button is on the right. Below is a table with columns for 'Employee', 'Employee File', and 'Settings'. The table lists three employees: Bob Employee\*, Jane Employee\*, and Michelle Employee\*. For each employee, there is a 'View' button in the 'Employee File' column and an 'Add' button in the 'Settings' column. A dropdown menu is open from the 'Add' button for Bob Employee, showing options: 'Note' (highlighted with a red box), 'Feedback', 'Development Goal', 'Succession', and 'Development Plan'. At the bottom, there is a status bar with a note '\* Employee is not registered.' and icons for 'Account Unlocked', 'Account Locked', 'Refuse to sign enabled', and 'Refuse to sign disabled'.

Employee	Employee File	Settings
Bob Employee*	View	Add
Jane Employee*	View	Add
Michelle Employee*	View	Add

« < 1 > »

\* Employee is not registered.

Account Unlocked  
 Account Locked

Refuse to sign enabled.  
 Refuse to sign disabled.

- 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

Cancel

Save & File

Save As Draft



# Feedback

Home / Tom Manager's Direct Reports

Search... ☐ Direct reports ☐ All reports [Compare Employees](#)

Employee	Employee File	Settings
Bob Employee*	View  Add	
Jane Employee*	View	
Michelle Employee*	View	

« < 1 > »

\* Employee is not registered.

Account Unlocked Account Locked





Refuse to sign enabled. Refuse to sign disabled.

- Note
- Feedback**
- Development Goal
- Succession
- Development Plan

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



# Development Goals



The screenshot shows a web interface for managing direct reports. At the top, there's a breadcrumb 'Home / Tom Manager's Direct Reports'. Below it is a search bar and two radio buttons: 'Direct reports' (selected) and 'All reports'. A 'Compare Employees' button is on the right. The main table has columns for 'Employee', 'Employee File', and 'Settings'. It lists three employees: Bob Employee\*, Jane Employee\*, and Michelle Employee\*. Each row has a 'View' button in the 'Employee File' column and an 'Add' button in the 'Settings' column. A dropdown menu is open from the 'Add' button for Michelle Employee, showing options: 'Note', 'Feedback', 'Development Goal' (highlighted with a red box), 'Succession', and 'Development Plan'. At the bottom, there are status messages: '\* Employee is not registered.', 'Account Unlocked / Account Locked', and 'Refuse to sign enabled / disabled'.

- 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	<input type="text"/>
Details	<div></div>
Measure	<div></div>
*Due Date	<input type="text"/> 

\* Indicates Required Field

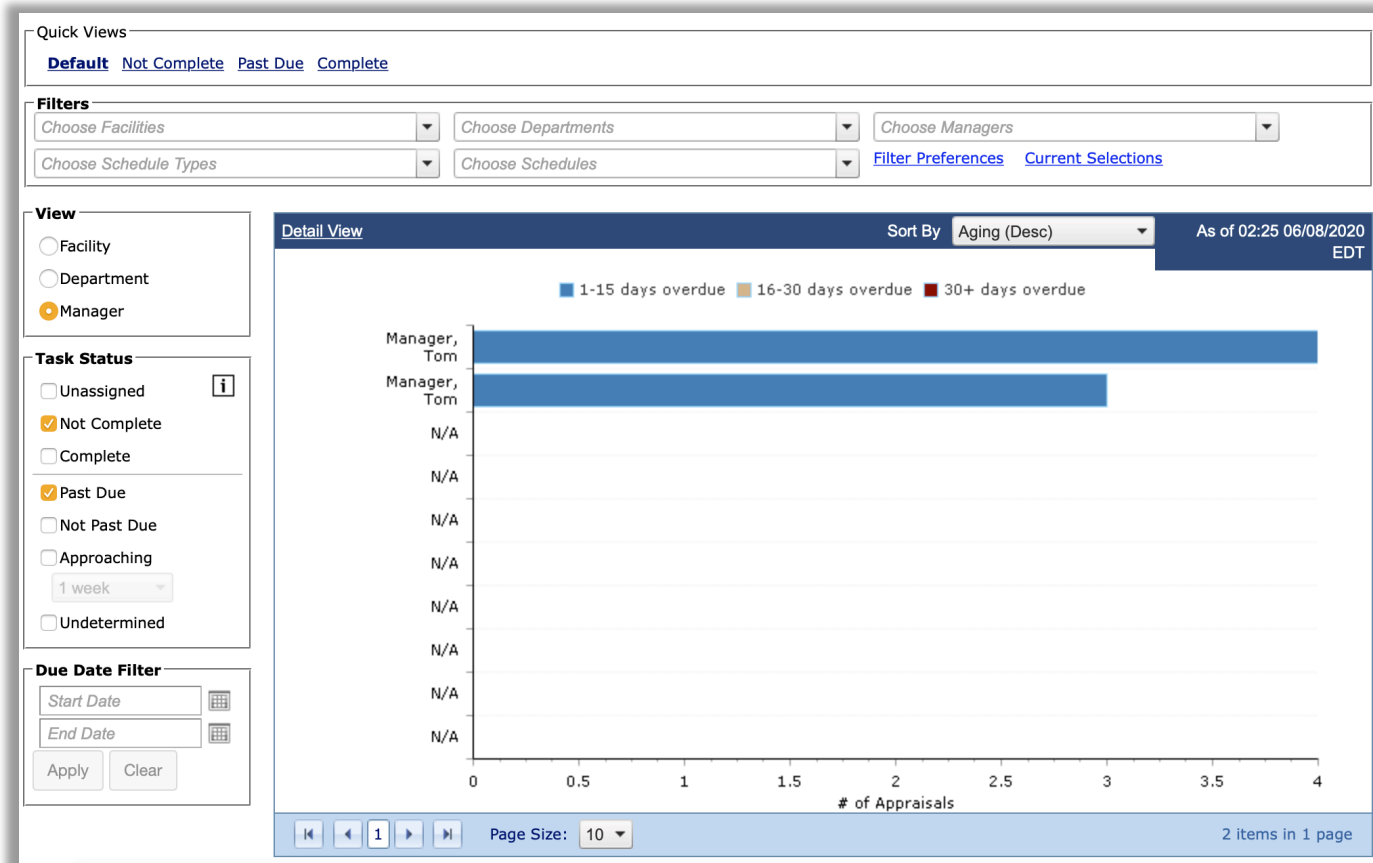
Save & Send

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](mailto:kyle.walker@wellforce.org), with any  
questions or requests for system  
support.