

# Performance Manager

Employee User 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)



# Signing Your Job Description



# Signing Your Job Description

**Dir-Financial Services**

First Name Tom  
Middle Name N/A  
Last Name Manager  
Position Code 12056  
Position Name Dir-Financial Services  
Department Code 8150  
Department Name Accounting  
Manager Name N/A  
Employee ID 1234

I understand that my electronic signature carries the same legal weight and authority as my written signature.

Name **Tom Manager** Date **10/22/2013**

Sign

Weights - (Total:100%)

Leader Template

This organization believes that each employee makes a significant contribution to our success. **We believe in working together to enrich the health and well-being of every life we touch.** This position description is designed to outline primary duties, qualifications and job scope. It is our expectation that each employee will offer his/her services wherever and whenever reasonably necessary to ensure the success of our endeavors.

Mission

EvergreenHealth will advance the health of the community it serves through our dedication to high quality, safe, compassionate, and costeffective healthcare.

Job Summary

Provides leadership for the Accounting, Decision Support Services, and Finance Departments, under the direction

Current and new employees will be required to acknowledge their job description within the Performance Manager system

To complete this task, log in to Performance Manager, visit your dashboard and select the “review job description task”

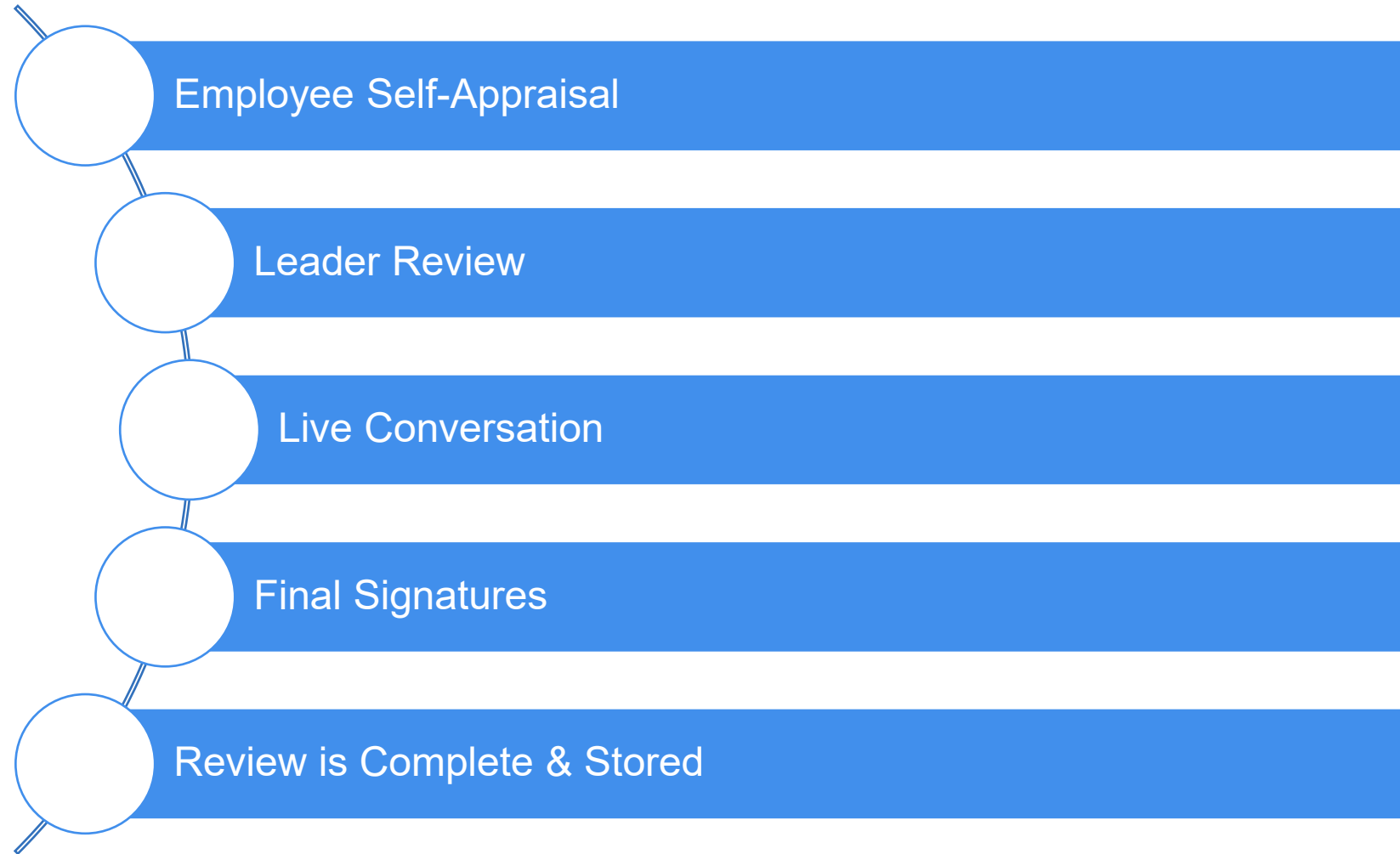
Review the job description and electronically sign off that you have received and reviewed the job description



# Performance Reviews



# Performance Review Workflow





# Performance Review Self-Appraisal

SE

Sally Employee  
Manager of Communication  
Admin-President at Wellforce Inc.

Filters

Task Types

☐ Appraisal: Review Appraisal 1

☐ Review Job Description 1

☐ Self Appraisal 2

My Task List

Search...






Type	Task	Employee Name	Due Date	Position/Department Name
Review Job Description	Sign Job Description	Sally Employee	5/11/2020	Manager of Communication, Admin-President
Self Appraisal	Self Appraisal : Demo Appraisal Schedule	Sally Employee	5/17/2020	Manager of Communication, Admin-President

- Employees will be required to complete a self-appraisal at the time of their 90-day and annual performance review
- You will receive an email notification from Performance Manager when your self-appraisal task has been assigned
- Log in to Performance Manager and select self-appraisal from your dashboard to begin the process





# Performance Review Self-Appraisal

- A. Evolve the Wellforce message and its communications efforts as the system continues to grow   
☐ 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
- C. Work with subject matter experts to create and edit communications content (videos, blogs, web content, social media, news stories, emails, white papers, case studies, infographics, etc.)   
☐ Outstanding ☒ Highly Effective ☐ Satisfactory ☐ Needs Improvement ☐ Unsatisfactory
- D. Act as the liaison with contracted services across all Wellforce members   
☐ Outstanding ☐ Highly Effective ☐ Satisfactory ☒ Needs Improvement ☐ Unsatisfactory
- E. Lead a group of member internal communications experts to ensure WF member employees are informed of and engaged with developments at Wellforce that may or may not affect their local organization   
☒ Outstanding ☐ Highly Effective ☐ Satisfactory ☐ Needs Improvement ☐ Unsatisfactory

Comments


I excel in communicating with team members.

43/2000

- The system will prompt you to rate yourself on 5 job-specific responsibilities and 5 – 8 professional standards
  - Your manager will also rate your performance in the same areas
- Selecting an “outstanding” or “unsatisfactory” rating will require you to input a comment explaining the reason for your rating



# Performance Review Self Appraisal

 ***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.***

Appraisal Comments

0/3000

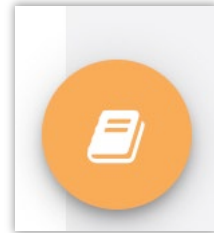
- Once you have completed the appraisal points, please enter any overall evaluation comments at the end of the page
- Select “Save and Send” to send your feedback to your supervisor, who will then complete your performance review



# Additional Features



# Employee Journal



The screenshot shows a modal window titled "Add Journal Entry" with a close button (X) in the top right corner. Below the title is a subtitle: "Make a note to yourself. This is not visible to your manager." The form contains three main sections: 1. "Title" with a text input field and a character count "0 / 1000". 2. "\* Note" with a larger text area and a character count "0 / 5000". 3. "Event date" with a calendar icon and a date input field. At the bottom left of the modal is a link that says "View your journal".

- Select the Journal Icon at the bottom right-hand corner to make a journal entry.
- Journal entries may include accomplishments that employees would like to reflect back on during their annual performance appraisal.
- Journal entries are not visible to your manager or other employees, though they are discoverable by HR.



# Questions

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