Performance Management (PM) is an ongoing process related to identifying, documenting, and measuring individual, team, and organizational performance throughout a fiscal year (FY; July 1 through June 30) as it relates to goal setting and alignment to organizational & divisional work plans, continuous review and documentation of performance, two-way communication on progress, along with feedback for improvement and continued development of capabilities.

For all eligible team members, the Performance Appraisal (PA) is an annual process of determining the level of individual performance throughout a fiscal year, based upon specific job function & responsibilities as well as our core values of ASPIRE (Accountability, Stewardship, Professionalism, Integrity, Respect, and Excellence). In addition, the team member’s strengths, development areas, Self-Appraisal, Secondary Reviewer comments, and where applicable, Colleague Input are all utilized in the creation of next fiscal year’s personal goals (required for all RNs: non-pilot program RNs complete outside of the Performance Management system, Pilot program RNs (Clinician 1-4 and Wage) enter into ePerformance; new requirement for all team members in FY18).

For all leaders, the FY17 Performance Appraisal evaluates performance related to five (5) established personal goals aligned with the organizational work plan (4) and leadership development (1) as well as our ASPIRE values. In addition, the leader’s strengths, development areas, Self-Appraisal, Secondary Reviewer comments, and Colleague Input are considered.

FY17 Non-RN Team Member Performance Management Process

FY17 RNs (except Clinician 1-4 and Wage) Team Member Performance Management Process

FY17 RN (Clinician 1-4 & Wage) Team Member Performance Management Process

FY17 Leader’s Personal Performance Management Process

FY17 Leader’s Team Performance Management Process
FY17 Non-RN Team Member Performance Management Process

1. **Performance Notes**: Ongoing documentation, within PeopleSoft Self Service, of your fiscal year performance; strongly encouraged to use as practice with personal goal setting (*Performance Notes job aid*)

2. **Self-Appraisal**: Required; (June 2017); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (*ePerformance*) on or around June 1st of the current fiscal year. (*Self-Appraisal Job Aid*)

3. **Colleague Input**: If requested to do so by a leader (*by invitation only; June 2017*); your perspective on a peer’s FY performance, captured in an online Performance Appraisal form. Available in ePerformance once you accept the request to participate. (*Colleague Input Job Aid*)

4. **Performance Appraisal**: Leader works on completing your PA (June and July 2017)
   a. Incorporates your Self-Appraisal and Colleague Input, if applicable
   b. Once the PA is completed, your leader submits to his/her leader for Secondary Review
   c. Once the Secondary Review is complete, your leader schedules a Performance Appraisal meeting with you

5. **Performance Appraisal Meeting**: Scheduled by your leader to review your PA as well as personal performance goals for next year (August 2017).

6. **Acknowledge Performance Appraisal**: You acknowledge your PA (August 2017)
   a. Accept
   b. Dispute
      i. **MUST be done in writing**, with **specific examples** of why he/she should be evaluated differently and on which performance factors, within ten (10) work days after the receiving the Performance Appraisal review.
      ii. **Leader MUST respond in writing** with a decision to either uphold or revise the performance appraisal, within five (5) business days.

7. **All Performance Appraisals Completed**: On or before August 31, 2017
FY17 RNs (except Clinician 1-4 and Wage) Team Member Performance Management Process

1. **SMARTS Goals:** Required (due 10/31/16); currently done outside of PeopleSoft Performance Management (ePerformance)

2. **Performance Notes:** Ongoing documentation, within PeopleSoft Self Service, of your fiscal year performance (Performance Notes job aid)

3. **Self-Appraisal:** Required; (June 2017); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) on or around June 1st of the current fiscal year. (Self-Appraisal Job Aid)

4. **Colleague Input:** Required; (June 2017); your perspective on a peer’s FY performance, captured in an online Performance Appraisal form. Available in ePerformance once you accept the request to participate. (Colleague Input Job Aid)

5. **Performance Appraisal:** Leader works on completing your PA (June and July 2017)
   a. Incorporates your Self-Appraisal and Colleague Input, if applicable
   b. Once the PA is completed, your leader submits to his/her leader for Secondary Review
   c. Once the Secondary Review is complete, your leader schedules a Performance Appraisal meeting with you

6. **Performance Appraisal Meeting:** Scheduled by your leader to review your PA as well as personal performance goals for next year (August 2017).

7. **Acknowledge Performance Appraisal:** You acknowledge your PA (August 2017)
   a. Accept
   b. Dispute
      i. MUST be done in writing, with specific examples of why he/she should be evaluated differently and on which performance factors, within ten (10) work days after the receiving the Performance Appraisal review.
      ii. Leader MUST respond in writing with a decision to either uphold or revise the performance appraisal, within five (5) business days.

8. **All Performance Appraisals Completed:** On or before August 31, 2017
FY17 RNs (Clinician 1-4 and Wage) Team Member Performance Management Process

1. **SMARTS Goals:** Required (due 10/31/16); enter into PeopleSoft Performance Management (ePerformance)
2. **Performance Notes:** Ongoing documentation, within PeopleSoft Self Service, of your fiscal year performance *(Performance Notes job aid)*
3. **Self-Appraisal:** Required; (June 2017); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) on or around June 1st of the current fiscal year. *(Self-Appraisal Job Aid)*
4. **Colleague Input:** Required; (June 2017); your perspective on a peer’s FY performance, captured in an online Performance Appraisal form. Available in ePerformance once you accept the request to participate. *(Colleague Input Job Aid)*
5. **Performance Appraisal:** Leader works on completing your PA (June and July 2017)
   a. Incorporates your Self-Appraisal and Colleague Input, if applicable
   b. Once the PA is completed, your leader submits to his/her leader for Secondary Review
   c. Once the Secondary Review is complete, your leader schedules a Performance Appraisal meeting with you
6. **Performance Appraisal Meeting:** Scheduled by your leader to review your PA as well as personal performance goals for next year (August 2017).
7. **Acknowledge Performance Appraisal:** You acknowledge your PA (August 2017)
   a. Accept
   b. Dispute
      i. MUST be done in writing, with specific examples of why he/she should be evaluated differently and on which performance factors, within ten (10) work days after the receiving the Performance Appraisal review.
      ii. Leader MUST respond in writing with a decision to either uphold or revise the performance appraisal, within five (5) business days.
8. **All Performance Appraisals Completed:** On or before August 31, 2017
FY17 Leader’s Personal Performance Management Process

1. **SMARTS Goals: Required (due 10/31/16)**; Five 5 Personal Goals – 4 aligned to organizational work plan and 1 leadership development (ePerformance) (Goals Job Aid)

2. **Performance Notes:** Ongoing documentation, within PeopleSoft Self Service, of your fiscal year performance (Performance Notes job aid)

3. **Self-Appraisal: Required;** (June 2017); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) on or around June 1st of the current fiscal year. (Leader Self-Appraisal Job Aid)

4. **Colleague Input: Required;** (June 2017); your perspective on a peer’s FY performance, captured in an online Performance Appraisal form. Available in ePerformance once you accept the request to participate. (Colleague Input Job Aid)

5. **Performance Appraisal:** Leader works on completing your PA (June and July 2017)
   a. Incorporates your Self-Appraisal and Colleague Input
   b. Once the PA is completed, your leader submits to his/her leader for Secondary Review
   c. Once the Secondary Review is complete, your leader schedules a Performance Appraisal meeting with you

6. **Performance Appraisal Meeting:** Scheduled by your leader to review your PA as well as personal goals, aligned with the organizational work plan and focused on development, for next year (August 2017).

7. **Acknowledge Performance Appraisal:** You acknowledge your PA (August 2017)
   a. Accept
   b. Dispute
      i. **MUST be done in writing**, with specific examples of why he/she should be evaluated differently and on which performance factors, within ten (10) work days after the receiving the Performance Appraisal review.
      ii. **Leader MUST respond in writing** with a decision to either uphold or revise the performance appraisal, within five (5) business days.

8. **All Performance Appraisals Completed:** On or before August 31, 2017
FY16 Leader’s Team Performance Management Process

1. Receive an FY17 Leader’s Guide (06/08/16)
2. Attend a SMARTS Goals Education Session (07/01/16 – 09/30/16)
3. SMARTS Goals: Meet with team members to assist them with their goal setting; Required for your RN and Leadership team members by 09/30/2016, optional for all other team members; Pilot program RNS (Clinician 1-4 & Wage) enter goals within PeopleSoft Performance Management; non-pilot program RNs and other team members document outside of PeopleSoft Performance Management (ePerformance)
4. Performance Notes: Ongoing documentation, within PeopleSoft Manager Self Service, of your team’s fiscal year performance (Leader Performance Notes job aid)
5. Self-Appraisal: Send request by 07/15/16; Required for your RN and Leadership team members, optional for all other team members (June); your individual team member’s perspective on his/her FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) on or around June 1st of the current fiscal year.
6. Colleague Input: Send request by 07/15/16; Required for your RN and Leadership team members (June and July 2017); you request the perspective of one or more peers of your team member on his/her FY performance, captured in an online Performance Appraisal form. Available in ePerformance once the nominee accepts your request to participate. (Request Colleague Input Job Aid)
7. Performance Appraisal: Work on completing each of your team member’s PA (June and July 2017) (Leader Performance Appraisal Job Aid)
   a. Incorporate his/her Self-Appraisal and Colleague Input, if applicable
   b. Once the PA is completed, submit the PA to your leader for Secondary Review (suggested by 07/31/16)
   c. Once the Secondary Review is complete, schedule a Performance Appraisal meeting with each team member
8. Performance Appraisal Meeting: Scheduled with your team member to review his/her PA as well as personal performance goals for next year (August 2017).
9. Acknowledge Performance Appraisal: Send an electronic request for acknowledgement of the team member’s PA (August 2017)
   a. Team member accepts, PA is complete
   b. Team member disputes:
      i. Team member MUST notify you in writing, with specific examples of why he/she should be evaluated differently and on which performance factors, within ten (10) work days after the receiving the Performance Appraisal review.
      ii. You MUST respond in writing with a decision to either uphold or revise the performance appraisal, within five (5) business days from receiving the written dispute.
10. All Performance Appraisals Completed: On or before August 31, 2017