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 RN Clinician 1-4, RN Wage, and APNs to enter goals into ePerformance; this is anticipated to be a requirement for all team members in FY19).

For all leaders, the FY18 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.

FY18 Non-RN Team Member Performance Management Process
FY18 RNs (except Clinician 1-4 and Wage & APNs) Team Member Performance Management Process
FY18 RN (Clinician 1-4 & Wage) & APN Team Member Performance Management Process
FY18 Leader’s Personal Performance Management Process
FY18 Leader’s Team Performance Management Process
FY18 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 2018); 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 2018); 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 2018)
   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 (July and August 2018).

   a. Accept
   b. Dispute
      i. MUST be done in writing, with specific examples of why you 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, 2018
FY18 RN (except Clinician 1-4 and Wage & APNs) Team Member Performance Management Process

1. **SMART Goals:** Required (due 12/31/17); 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 2018); 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 2018); 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 2018)
   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 performance goals for next year (July and August 2018).

7. **Acknowledge Performance Appraisal:** You acknowledge your PA (August 2018)
   a. Accept
   b. Dispute
      i. **MUST be done in writing,** with specific examples of why you 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, 2018
FY18 RN (Clinician 1-4 and Wage) & APN Team Member Performance Management Process

1. **SMART Goals**: Required (due 12/31/17); 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 2018); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) immediately after your leader approves your goals. (Self-Appraisal Job Aid)
4. **Colleague Input**: Required; (June 2018); 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; available after goal approval (June and July 2018)
   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 performance goals for next year (July and August 2018).
7. **Acknowledge Performance Appraisal**: You acknowledge your PA (August 2018)
   a. Accept
   b. Dispute
      i. MUST be done in writing, with specific examples of why you 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, 2018
FY18 Leader’s Personal Performance Management Process

1. **SMART Goals**: Required (due 12/31/17); 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 2018); your perspective on your FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) immediately after your leader approves your goals. *(Leader Self-Appraisal Job Aid)*

4. **Colleague Input**: Required; (June 2018); 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; available after goal approval (June and July 2018)
   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 (July and August 2018).

7. **Acknowledge Performance Appraisal**: You acknowledge your PA (August 2018)
   a. Accept
   b. Dispute
      i. **MUST** be done in writing, with specific examples of why you 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, 2018
FY18 Leader’s Team Performance Management Process

1. **SMART Goals:** Meet with team members to assist them with their goal setting; **Required** for your RN, APN and Leadership team members by 12/31/2017, optional for all other team members; RNs (Clinician 1-4 & Wage) and APNs enter goals within PeopleSoft Performance Management; non-pilot program RNs and other team members document outside of PeopleSoft Performance Management (ePerformance)

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

3. **Self-Appraisal:** Send request by 07/15/18; **Required** for all team members (June 2018); your individual team member’s perspective on his/her FY performance, captured in an online Performance Appraisal form. Available in PeopleSoft Performance Management (ePerformance) immediately after you approve leader/RN/APN online goals or for all other roles, on or around June 1st of the current fiscal year.

4. **Colleague Input:** Send request by 07/15/18; **Required** for your RN, APN and Leadership team members (June and July 2018); 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)*

5. **Performance Appraisal:** Work on completing each of your team member’s PA (June and July 2018) *(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 07/31/18)
   c. Once the Secondary Review is complete, schedule a Performance Appraisal meeting with each team member (July and August 2018)

6. **Performance Appraisal Meeting:** Scheduled with your team member to review his/her PA as well as personal performance goals for next year (August 2018).

7. **Acknowledge Performance Appraisal:** Send an electronic request for acknowledgement of the team member’s PA (August 2018)
   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.

8. **All Performance Appraisals Completed:** On or before August 31, 2018