INTRODUCTION

Welcome to the NYC Health and Hospitals Group 11 Performance Management course, Part One.

This course is designed for all non-unionized Group 11 employees and will focus on the Create and Collaborate phases of the Performance Management Process.

Click on the PDF icon to download a copy of this training.

Click on "CC" button to view the closed captions.

By the end of this course, you'll know how our organizational goals relate to the Performance Management Process.

- Understand your role as a non-unionized Group 11 employee
- Understand your role as an evaluator, if you have direct reports
- Learn how to use PeopleSoft to create individual goals
- And how to collaborate with your manager.

ALIGNING SYSTEM GOALS

Let's start by taking a closer look at our system's goals.

Our systems goals can be broken down into qualitative goals that are reflected in our mission statement and quantitative goals that are the operational steps to achieve our system's yearly strategic plan.

Quantitative goals are tracked on our system's score cards and are modified from year to year based on the updated strategic plan.

As a safety net healthcare system, the system's strategic plan is centered on our patients, our staff, and our financial sustainability.


With this understanding of our system's goals, let's take a closer look on how these goals relate to the performance management process. Each employee's goals should be aligned to the department, business unit, facility, and system-wide goals.

Here's a tip. Managers should meet with their staff and each employee to share the yearly departmental goals.

Here is an example. An Adult Medicine Practice supervisor has an individual goal to decrease no show rates by 10%, by improving outreach and appointment confirmations by the second quarter through reminder calls, follow up outreach and tracking patient no show rates after implementation of the training program.

Let's break it down. The individual goal is to conduct patient follow-up training. This goal relates to the department goal to reduce the Adult Medicine Practice's no show rate.

The department goal supports the Ambulatory Care goal to reduce no shows. Ultimately, this individual goal supports the patient experience system goal.
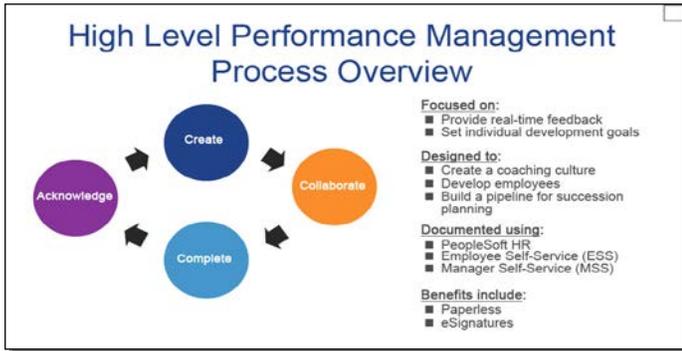
THE PERFORMANCE MANAGEMENT PROCESS

Here is a high level performance management process overview, including Create, Collaborate, Complete and Acknowledge.

This is an ongoing process that restarts at the beginning of each year.

These activities focus on real-time feedback and help set individual development goals. Also, these activities are designed to create a coaching culture, develop employees, and build a pipeline for succession planning.

NYC Health and Hospitals uses PeopleSoft HR as our system of record to track the Performance Management Process. Within PeopleSoft, Employee Self-Service and Manager Self-Service provides access to performance documents.

The benefits are that the system is paperless and uses online eSignatures.

In the Create phase, the employee creates their individual goals In Employee Self-Service.
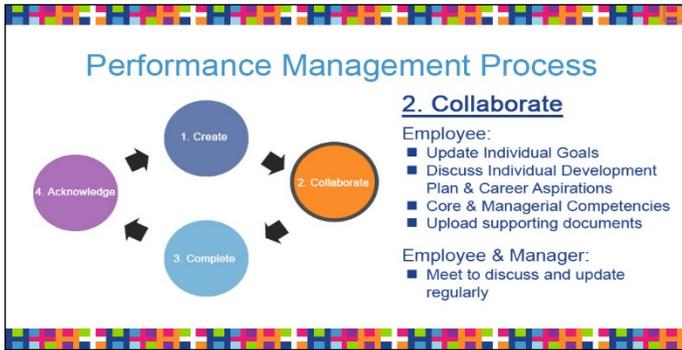
In the Collaborate phase, the employee updates their performance document to discuss with their manager regularly.

In the Complete phase, the employee makes their final edits to their performance document, evaluates their performance on their individual goals, then submits the performance document to their manager.

The manager reviews the employee's achievements and self-evaluation, evaluates the employee, meets with the employee to discuss, and then finalizes the performance evaluation.

In the Acknowledge phase, the employee receives an email with a link to acknowledge their performance evaluation.

Once the employee has acknowledge their performance evaluation, their manager receives an email with a link to view the employee's acknowledgement and comments in Manager Self-Service.

CREATE PHASE: ENTERING INDIVIDUAL GOALS

Let's take a closer look at the employee's role in the Create phase.

You will start by entering your individual goals for each business goal in Employee Self-Service. You may enter more than one goal within each business goal.

Here's a tip. Make sure that the number of individual goals equals the number of business goals.

CREATE PHASE: SMART GOALS

It is a best practice to make each individual goal a smart goal.

Smart is a mnemonic where S is for specific, M is for measurable, A is for achievable, R is for relevant, and T is for time-based.

Click on the document icon to view a list of questions that you can ask yourself when you are writing smart goals.

Here is an example of a SMART Goal for an Associate Director in the Emergency Department that is aligned to the system's financial goal.

The financial goal is to reduce the Left Without Being Seen rate by 5% by developing a new intake process to improve door-to-provider time, to improve patient safety over the next 12 months.

DEMONSTRATION: ENTERING INDIVIDUAL GOALS

Let's take a moment to see a demonstration on how to enter your individual goals in Employee Self-Service.

Performance Management Part 1 – Create and Collaborate

EMPLOYEE ACCESSING PERFORMANCE DOCUMENTS

From the NYC Health and Hospitals Insider, scroll down to the bottom of the page.
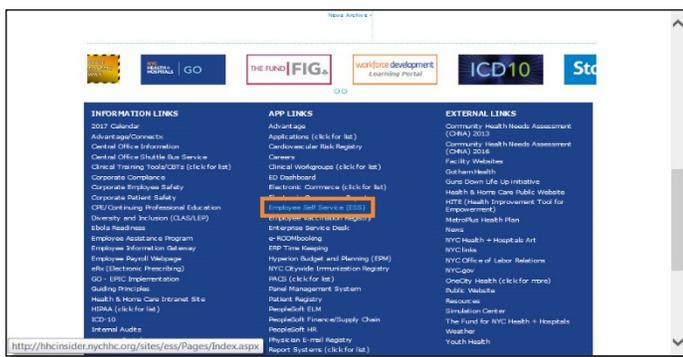
Under App Links in the center of the blue box, click on the Employee Self-Service link.
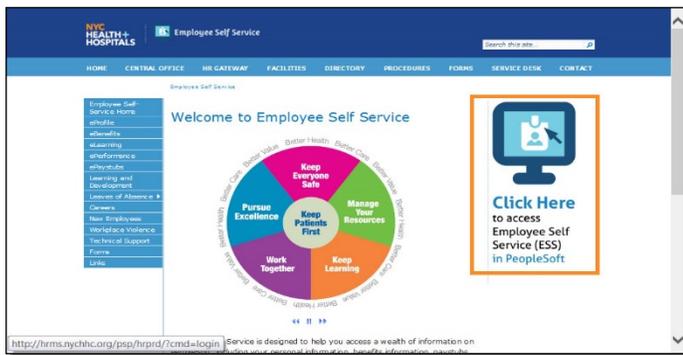
On the Employee Self-Service page, click on the Employee Self Service icon.

Enter you user ID and password.

Performance Management Part 1 – Create and Collaborate

Click the Sign In button.
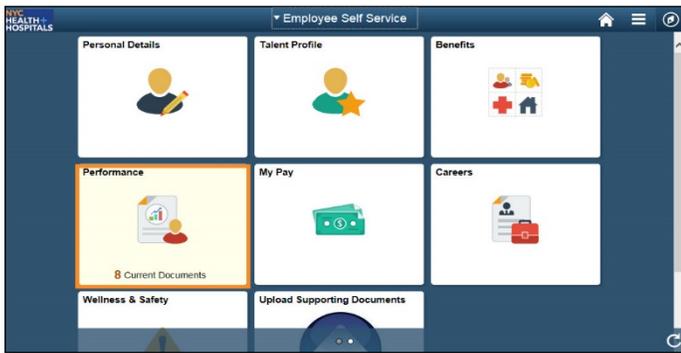
Click on the Performance box.
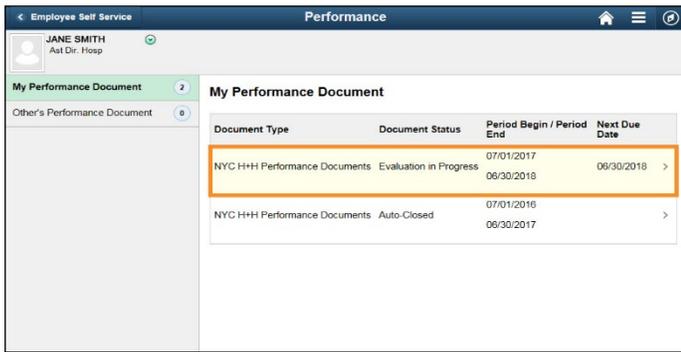
Click on the current year performance document.
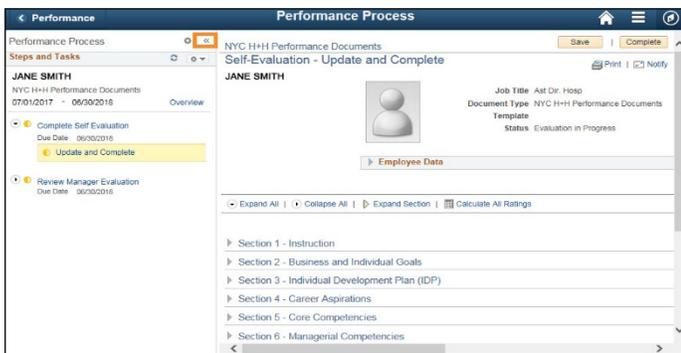
Click the Collapse button to hide the Steps and Tasks.

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Performance Management Part 1 – Create and Collaborate

Note the number of sections on your performance document vary.

If you have direct reports, either Group 11 non-unionized employees or Group 12 unionized employees, there is an additional section call Managerial Competencies.

Scroll down to continue.

Expand Section 1.

Expand the Instructions section.

Performance Management Part 1 – Create and Collaborate
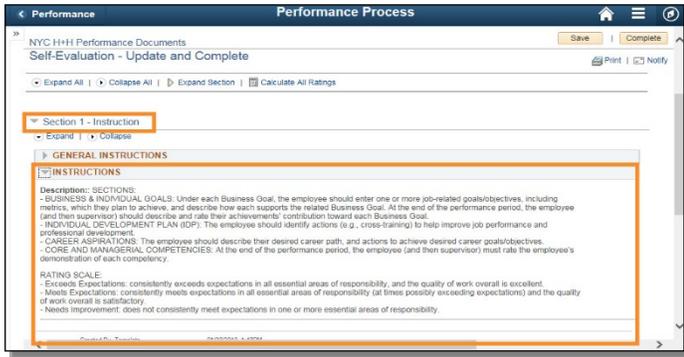
After reviewing the instructions, Collapse Section 1.
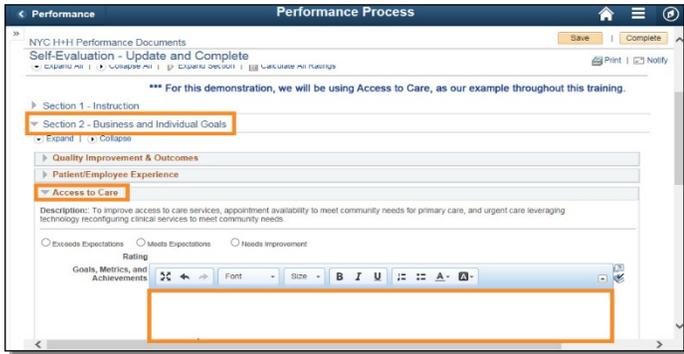
We will be using Access to Care as our example throughout this training.

Expand Section 2 to view the Business and Individual Goals section.

Expand the Access to Care business goal.
In the Goals, Metrics, and Achievements box, enter your related individual goals.

You repeat the same process for each business goal.
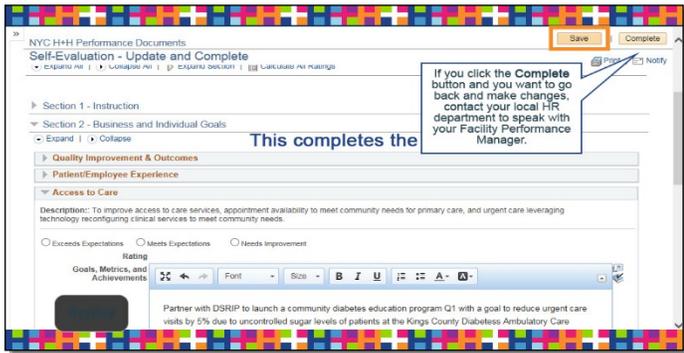
Click the Save button to update the performance document.

If you click the Complete button and you want to go back and make changes, you may contact your local facility Human Resources department to speak with Facility Performance Manager to make your performance document available for editing.

This completes the demonstration of entering your individual goals.

To view this demonstration again, click the Replay button or click the Next Arrow to continue.
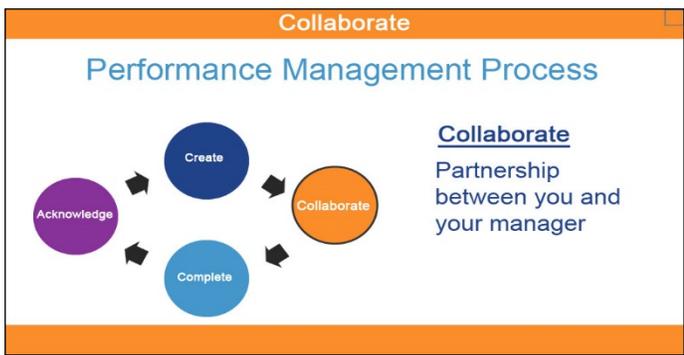
COLLABORATE PHASE: PARTNERSHIP BETWEEN EMPLOYEE AND MANAGER

The next phase in the performance management process is the Collaborate phase.

This phase represents the partnership between you and your manager.

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PeopleSoft facilitates collaboration with a unique feature that allows both you and your manager to enter information in Employee Self-Service and Manager Self-Service throughout the year.

Both you and your manager have your own copy of your performance document.

You can make updates to your individual goals, your individual development plan, your career aspirations, and upload supporting documentation.

Your manager may enter notes and upload supporting documentation.

Throughout the year you can collaborate with your manager by meeting with your manager regularly to confirm that your individual goals are in alignment with the department's goals as well as update your individual goals based on changes in work assignments and update your accomplishments.

Take time to discuss your individual development plan as you get more information on developmental opportunities that become available to you.

Your manager is responsible to provide their feedback on your individual goals, accomplishments, and individual development plan.

Your manager may also keep electronic notes on their version of your performance document.

**Performance Management Part 1 – Create and Collaborate**
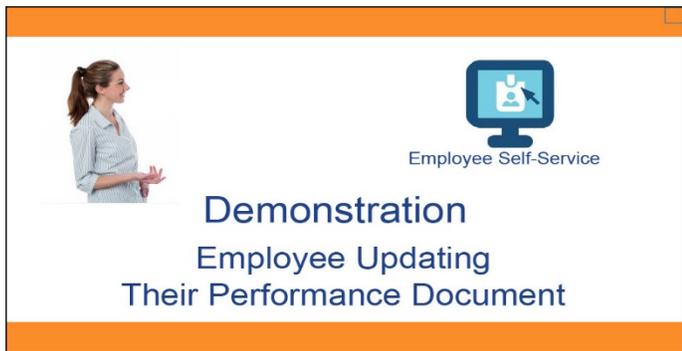
DEMONSTRATION: EMPLOYEE UPDATES PERFORMANCE DOCUMENT

In Employee Self-Service, we'll see a demonstration of an employee updating their performance document.
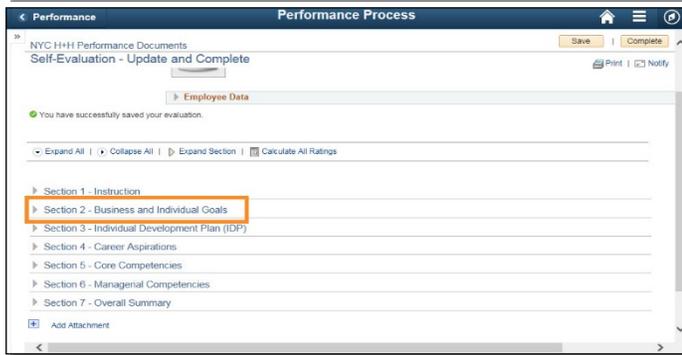
Expand Section 2 - Business and Individual Goals to update your individual goals.

Expand the Access to Care business goal.
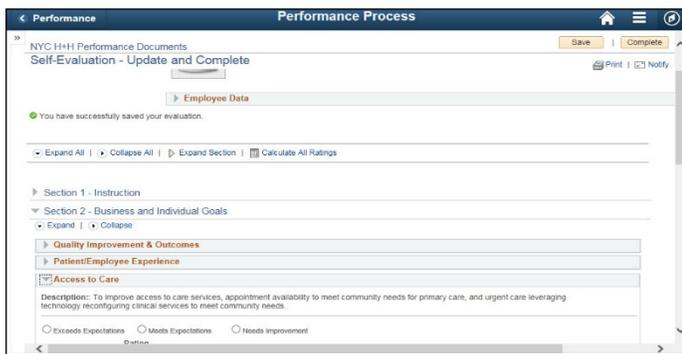
Scroll down.

Performance Management Part 1 – Create and Collaborate

In the Goals, Metrics, and Achievements text box, make any edits to your individual goals.

Click the Save button to update the performance document.

This completes the demonstration of updating your performance document.

To view this demonstration again, click the Replay button or click the Next Arrow to continue.
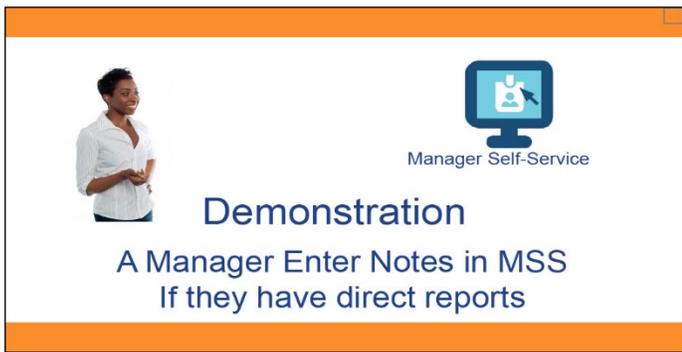
DEMONSTRATION: MANAGER ENTERS NOTES IN MSS

Now we will see a demonstration of a manager entering notes for a Group 11 non-unionized employee in Manager Self-Service.


**MANAGER ACCESSING EMPLOYEE'S PERFORMANCE DOCUMENT**

In Employee Self-Service, enter your user ID and your password.

Click the Sign In button.

**Performance Management Part 1 – Create and Collaborate**
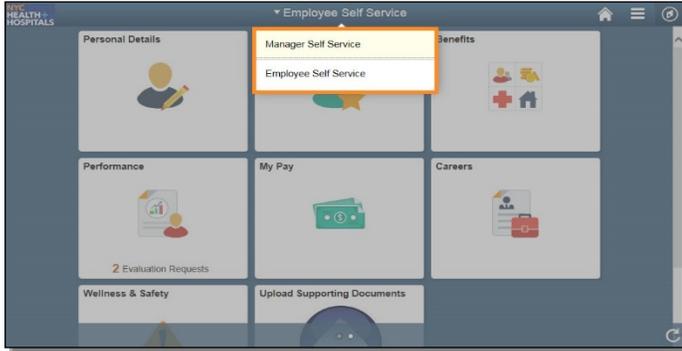
Click on the drop down to switch from Employee Self-Service to Manager Self-Service.

Click on the Manager Dashboard.
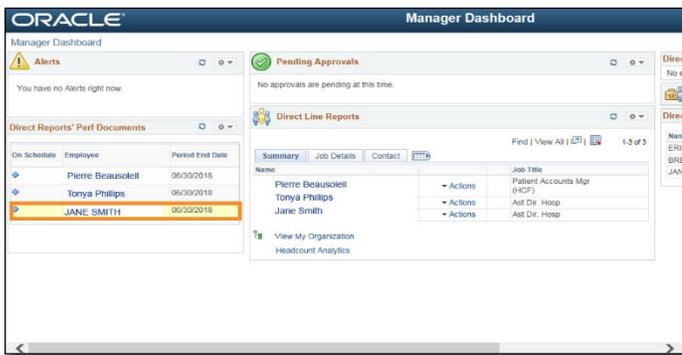
Select the employee in which you would like to add some notes.
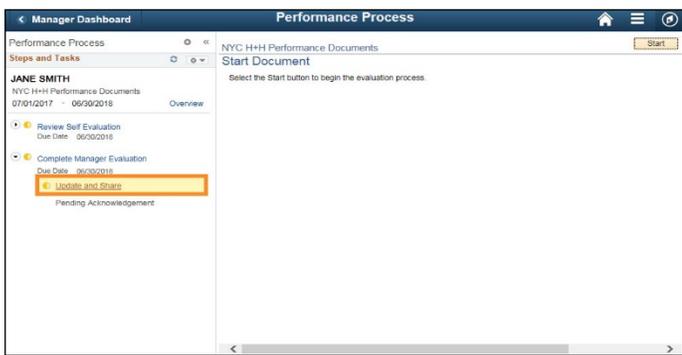
Click the Update and Share link.

Performance Management Part 1 – Create and Collaborate
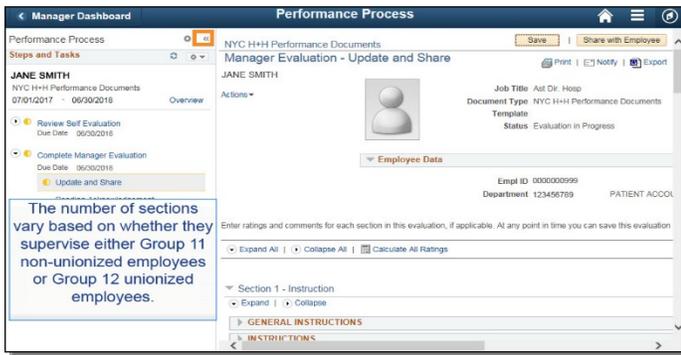
Remember the number of sections vary based on whether they supervise either Group 11 non-unionized employees or Group 12 unionize employees.

To continue, click the Collapse button to hide the Steps and Tasks.
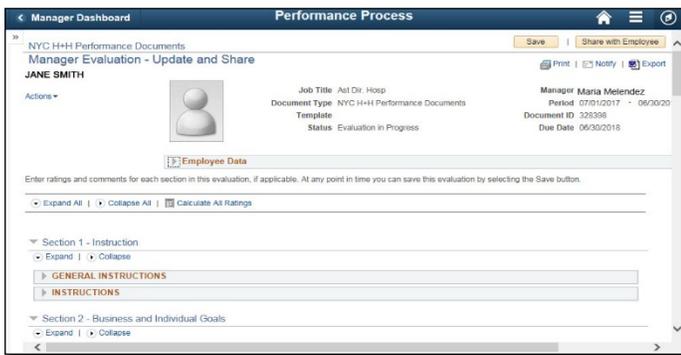
Scroll down.
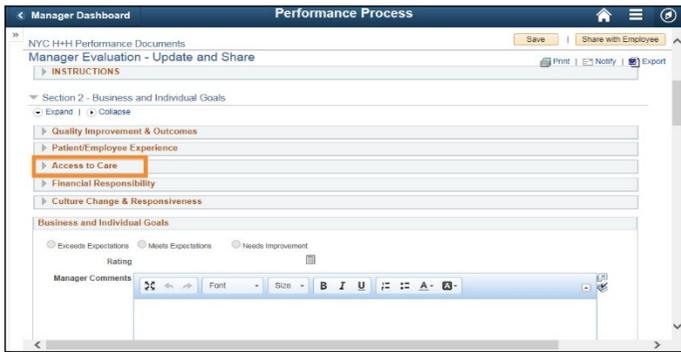
Under Section 2 - Business and Individual goals, expand the Access to Care business goal.
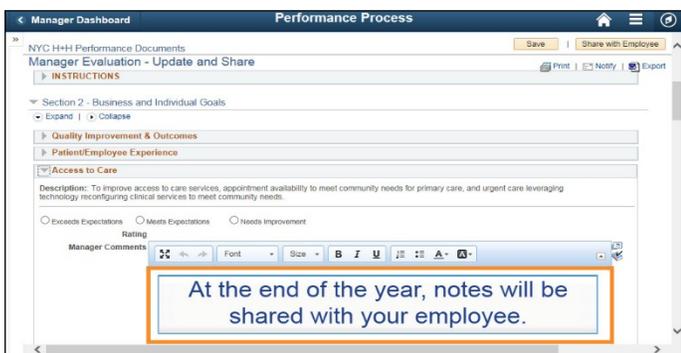
In the Manager Comments box, enter your notes on your employee's progress on projects throughout the year.

At the end of the year, you may edits your notes that will be shared with your employee.

**Performance Management Part 1 – Create and Collaborate**
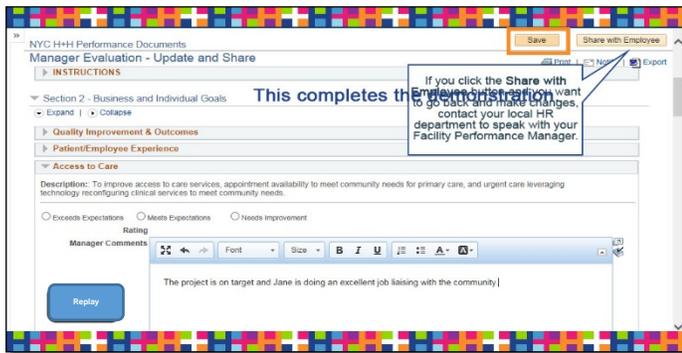
Click the Save button to update the performance document.

If you click the Share with Employee button and you want to go back and make changes, you may contact your local facility Human Resources department to speak with Facility Performance Manager to make your employee's performance document available for editing.

This completes the demonstration of a manager enter notes and updating their version of the performance document.

To view this demonstration again, click the Replay button or click the Next Arrow to continue.
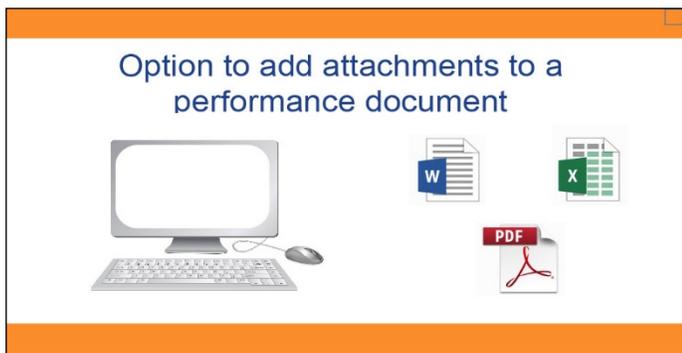
DEMONSTRATION: ATTACHING SUPPORTING DOCUMENTS

Both you and your manager have the option to add attachments to a performance document.

These attachments can be work samples that demonstrate an employee's contributions to their role, for example a presentation, a project plan, or a report created in Excel.

In addition, other supporting documents like functional job descriptions, job-specific competencies, certificates of completion, and recognitions can be attached to the performance document.


Click on the Add Attachment link.

**Performance Management Part 1 – Create and Collaborate**
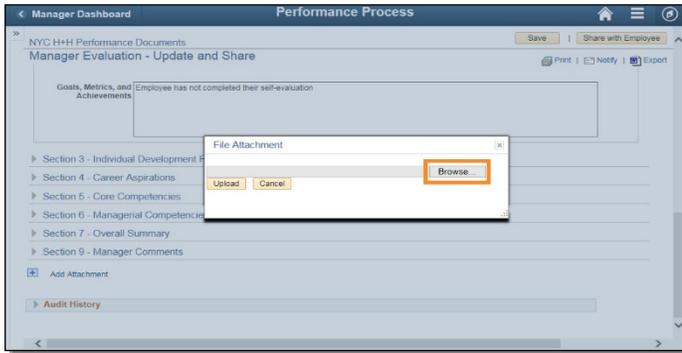
Click the Browse button to search for the file to attach.
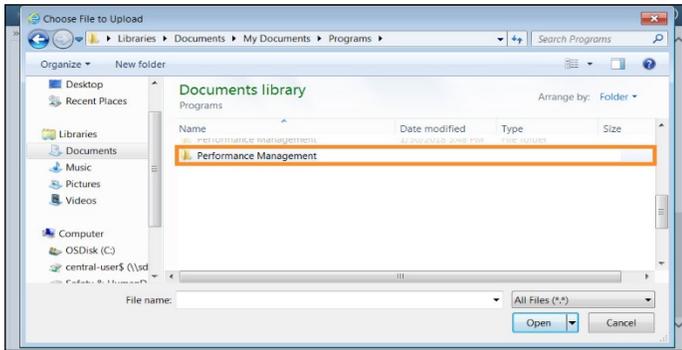

Go to the file location.
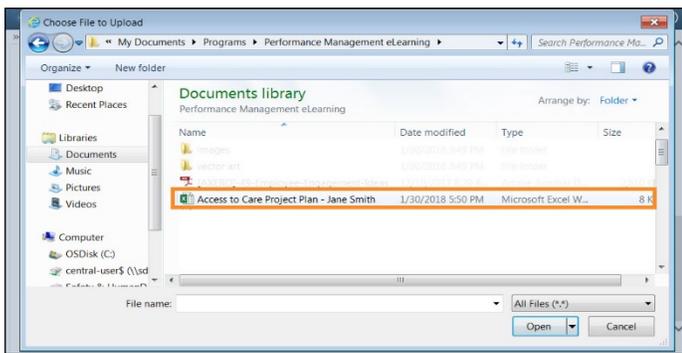

Select the file to be attached.
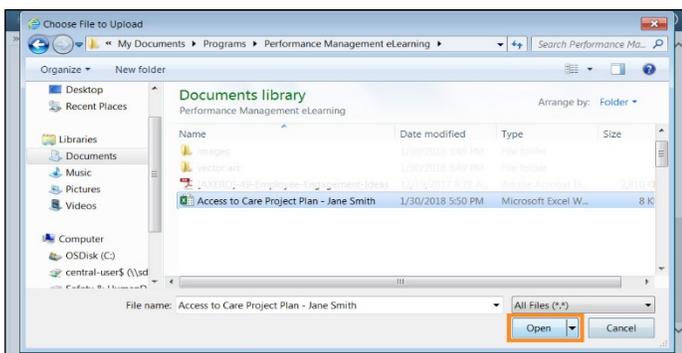

Click the Open button.

Performance Management Part 1 – Create and Collaborate
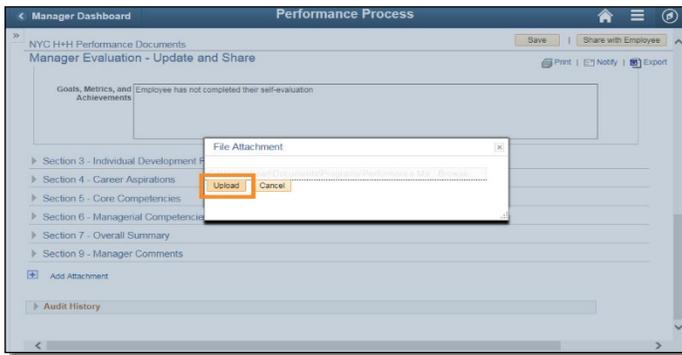

Click the Upload button.
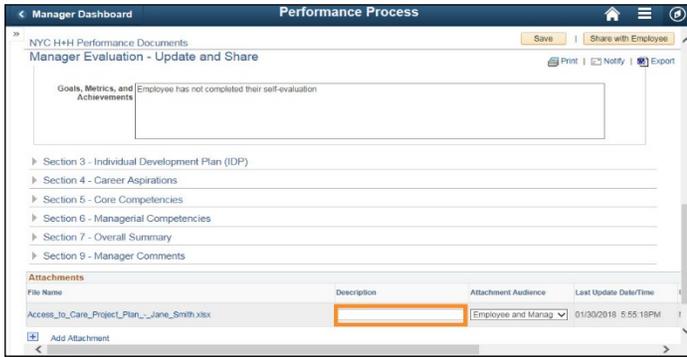
You have the option to enter a file description.

Click the Save button to update the performance document.

This completes the demonstration of attaching files to a performance document.

To view this demonstration again, click the Replay button or click the Next Arrow to continue.

REVIEW

Let's do a quick review.

You learned about the entering individual goals in the Create phase.

You learned about updating your performance document, saw how a manager is able to enter notes and update their copy of your performance document, and how to add file attachments in the Collaborate phase.

Note that there will be additional eLearning modules on how to create an Individual Development Plan and Career Aspirations.

Performance Management Part 1 – Create and Collaborate

Now that we have reviewed the Create and Collaborate phases of the performance management process, keep in mind that the process remains the same for each year.

And that the strategic goals are updated each year as well.

Click on the PDF icon to download a copy of this training.

For any questions about the performance management process, email your questions to performancemgmt@nychhc.org, or you can click on the Learning Portal to view supporting documents about the Performance Management process.

Congratulations. You have completed part one of the performance management course for group 11 non-unionized employees, reviewing the Create and Collaborate phases.

Continue to the next course in the series, Performance Management Part 2, reviewing the Complete and Acknowledge phases of the performance management process, which can be found under MyLearning on the PeopleSoft ELM.

Click the Exit icon on the player bar to register your course completion.