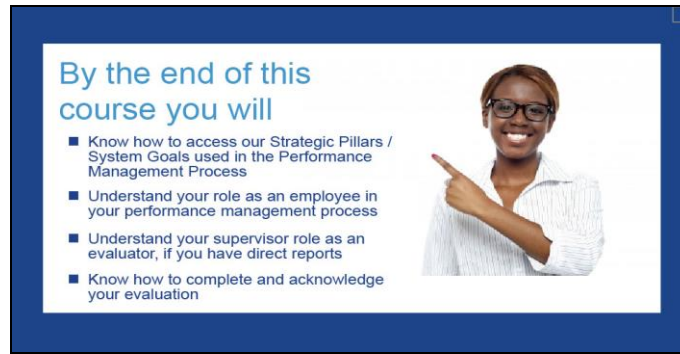


Slide 1 - Start

Slide notes: Welcome to the NYC Health + Hospitals Group 11 Performance Management course.


Click on the PDF icon to download a copy of this training. Click on "CC" button to view the closed captions.

Use navigation buttons on the player bar to continue.



By the end of this course you will

- Know how to access our Strategic Pillars / System Goals used in the Performance Management Process
- Understand your role as an employee in your performance management process
- Understand your supervisor role as an evaluator, if you have direct reports
- Know how to complete and acknowledge your evaluation



Slide 2 - End

Slide notes: By the end of this course, you'll know:

- How to access our Strategic Pillars and System's goals used in the Performance Management Process.
- Understand your role as an employee in your performance process.
- Understand your supervisory role as an evaluator, if you have direct reports.
- And how to complete and acknowledge your evaluation.



Slide 3

Slide notes: Here is a high level performance management process overview, which includes three phases: Collaborate, Complete, and Acknowledge.

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

Each phase focuses on real-time feedback and helps set individual development goals.

Also, it is designed to create a coaching culture, develop employees, and build a pipeline for succession planning.



Slide 4

Slide notes: 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 provide access to the performance evaluation.

Benefits include that it is paperless and uses eSignatures.



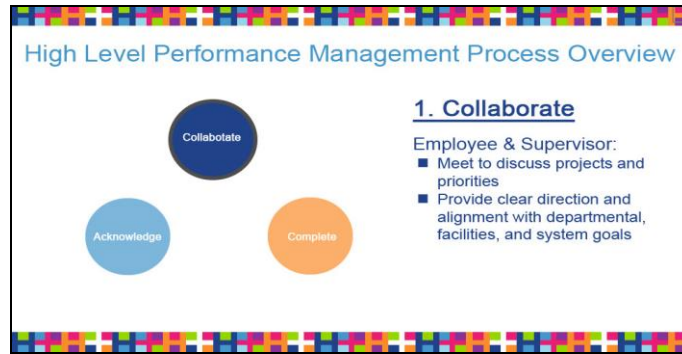
Slide 5

Slide notes: PeopleSoft has a unique feature where both you and your supervisor have your own copy of your performance evaluation.

You may enter your accomplishments with an option to enter an individual development plan and career aspirations, as well as upload supporting documentation.

Your supervisor may enter comments as well and upload performance documentation.

After you complete your self-evaluation, your copy and your supervisor's copy are merged, then your supervisor completes your performance evaluation.



Slide 6

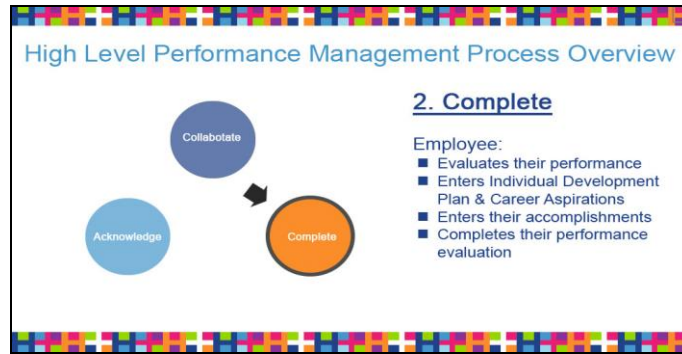
Slide notes: Let's take a closer look at each phase of the Performance Management Process.

In the Collaborate phase, you and your supervisor meet throughout the year regarding projects, priorities and how they relate to system, facility, department and individual goals.

Collaboration gives you and your supervisor a clear direction to follow throughout the year as well as the ability to adjust priorities to support your professional development.

This gives you and your supervisor the opportunity to share your observations and receive regular feedback.

This ensures that your work is in alignment with the department and system goals.



Slide 7

Slide notes: In the Complete phase, you enter your accomplishments, self-evaluate your performance against the Strategic Pillars and System Goals, Competencies and Overall Performance.

Note that you have the option to enter an individual development plan and career aspirations in the performance evaluation.

The slide features a colorful border at the top and bottom. The main content is divided into two sections. The top-left section is titled "Individual Development Plan (IDP)" and includes a bulleted list: "Milestones to assess your progress" and "Supports your professional development". To the right of this text is a photograph of a person's hands writing on a document. The bottom-left section is titled "Career Aspirations" and includes a bulleted list: "A long term and ongoing process", "A path that you want your career to follow", and "An individual development plan could be the steps to achieve". To the left of this text is a photograph of a person's hand pointing at a laptop screen.

Individual Development Plan (IDP)

- Milestones to assess your progress
- Supports your professional development

Career Aspirations

- A long term and ongoing process
- A path that you want your career to follow
- An individual development plan could be the steps to achieve

Slide 8

Slide notes: An Individual Development Plan, also known as an IDP, is a tool to help plan your career and guides your professional development with milestones to assess your progress.

It is designed to support your professional development over the next year.

A career aspiration is a path that you want your career to follow.

A career aspiration is a long term and ongoing process, unlike individual goals or an IDP, which may be the steps to achieve your career aspirations.



Slide 9

Slide notes: Next, you complete the performance evaluation and share it with your supervisor.

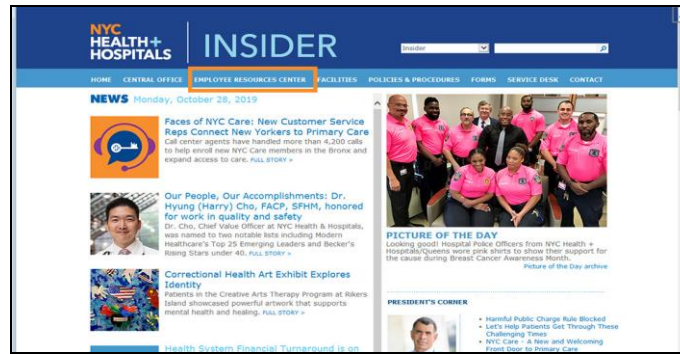
Then, your supervisor reviews your accomplishments and self-evaluation, evaluates you, and shares the completed performance evaluation with you.



Slide 10

Slide notes: In the Acknowledge phase, once your supervisor completes your evaluation in PeopleSoft, you will receive an email with a link to acknowledge your performance evaluation.

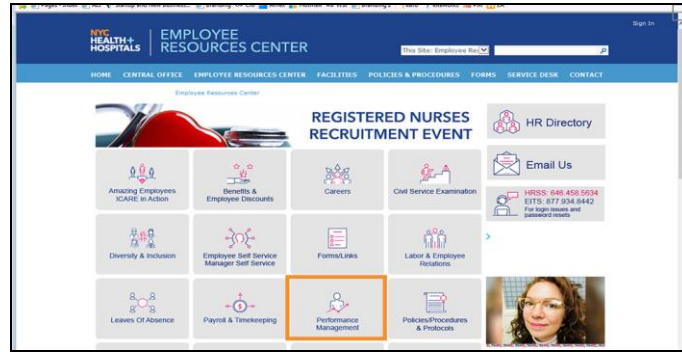
Once you acknowledge your performance evaluation, your supervisor receives an email with a link to view your acknowledgement and comments.



Slide 11

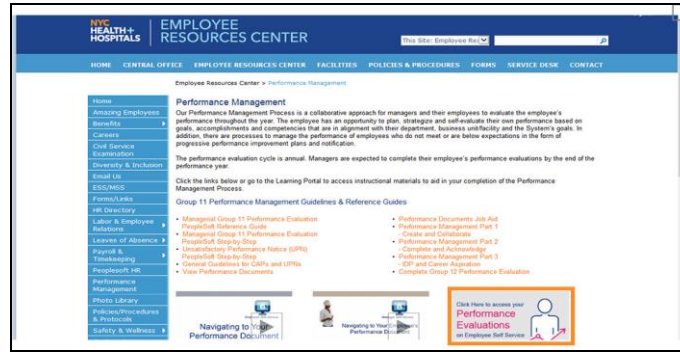
Slide notes: Now that we have reviewed the performance management process, let's see how it looks in PeopleSoft. One way to access your performance evaluation is to go to the Insider and then on the Menu bar click the Employee Resource Center link.

Performance Management



Slide 12

Slide notes: Click on the Performance Management tile.



Slide 13

Slide notes: And then click on the Performance Evaluations tile...



Slide 14

Slide notes: ...to open PeopleSoft.

Or you may receive an email from PeopleSoft with a link to open the performance evaluation.

NYC HEALTH+HOSPITALS | PEOPLESOFT HR

User ID

Password

[Sign In](#)

If you are having difficulties logging in to PeopleSoft please contact the Enterprise Service Desk at 877-826-8442 or email EnterpriseServiceDesk@nychhc.org

Slide 15

Slide notes: Sign onto PeopleSoft HR.



Slide 16

Slide notes: Click on the Performance Tile.

Performance Management

Employee Self Service Performance

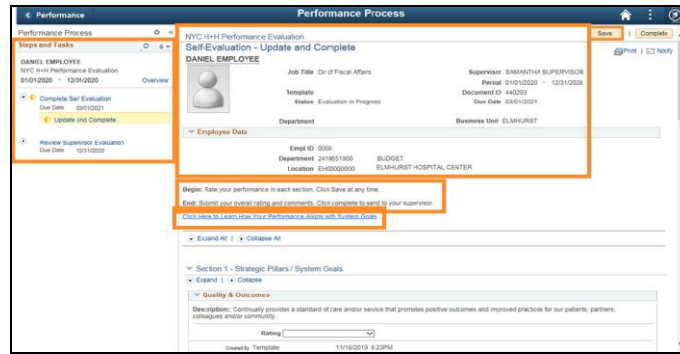
DANIEL EMPLOYEE
Dir of Fiscal Affairs (AS)

My Performance Document
Other's Performance Document

Document Type	Document Status	Period Begin / Period End	Next Due Date
NYC HHH Performance Evaluation	Evaluation in Progress	01/01/2020 12/31/2020	12/31/2020

Slide 17

Slide notes: Select the current year performance document.



Slide 18

Slide notes: Let's take a closer look at the performance evaluation.

The top left section includes the Steps and Tasks, which has your name, performance period and performance evaluation status.

On the top right is your employee information and Employee Data.

Below the employee data, you will see instructions on how begin and end the performance evaluation.

Click on the link to view supporting information on our Strategic Pillars and System Goals, ICARE values and other documentation to support the Performance Management Process.

Here's a tip - It is a best practice for you to save your work periodically.

Rating Scale includes:

- ⇒ Not Applicable
- ⇒ Below Expectations
- ⇒ Meets Expectations
- ⇒ Exceeds Expectations

Not Applicable:

- New to your role
- Not part of your job function

Exceeds or Meets Expectations:

- Requires a justification in the Overall Summary Section

Slide 19

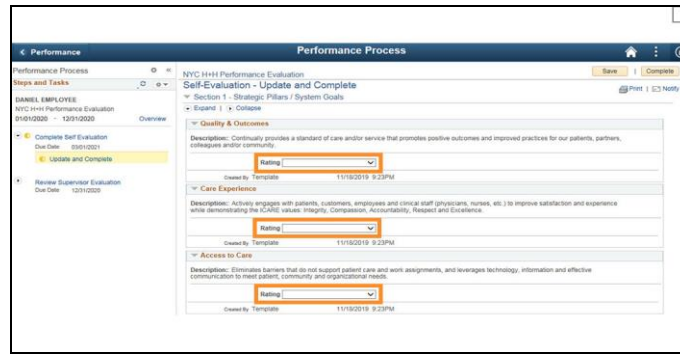
Slide notes: Next you will self-evaluate your performance.

At NYC Health and Hospitals, we are using a four tiered rating scale, including:

Not Applicable, which applies when you are new to your role or it is not part of your job function,

Below Expectations, Meets Expectations, Exceeds Expectations

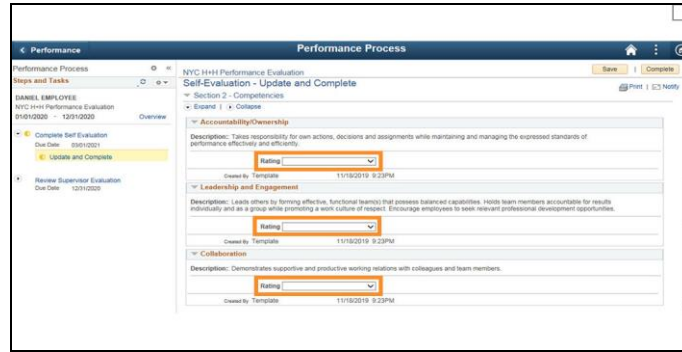
If you or your supervisor selects Exceeds or Meets Expectations, you must include a description and examples to justify this rating in the Overall Summary Section.



Slide 20

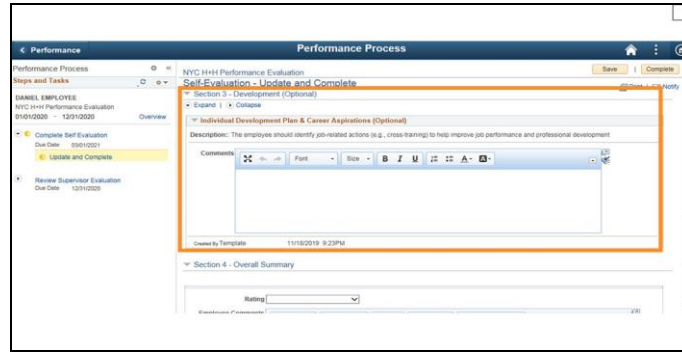
Slide notes: Scroll through Section 1, and use the drop down arrow to select your rating for each Strategic Pillar and System Goal.

As you navigate your performance evaluation, if you find that your role does not support a specific Strategic Pillar or System Goal, you have the option to select Not Applicable.



Slide 21

Slide notes: Scroll to Section 2, use the drop down arrow to select your rating for each competency, including: Accountability and Ownership, Leadership and Engagement, and Collaboration.



Slide 22

Slide notes: Scroll to Section 3, you have the option to enter an individual development plan, career aspiration or both.




Slide 23

Slide notes: Here are some examples of individual development plan activities, such as, rotational assignments, training, reading, or self-study.

Here is a list of more ideas, including working with a coach, special projects, cross training, presentations, community volunteering, professional certifications, and stretch assignments.

Cross-Train IDP Example in the Emergency Department



Director of Nursing

By the end of the year, complete cross-training in the Emergency Department to increase staffing flexibility, improve efficiency and teamwork, and better enabling her team to meet and exceed our patients' needs for safe, quality nursing care.

Slide 24

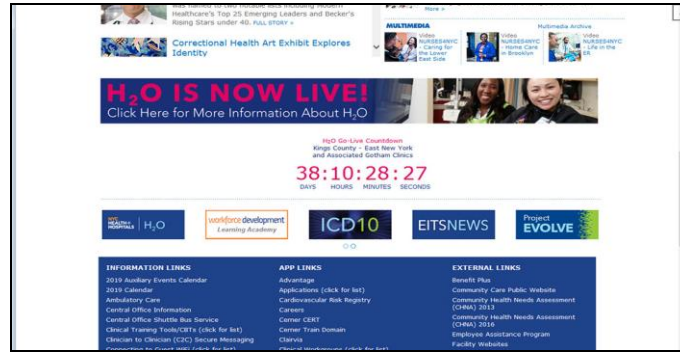
Slide notes: Here is an example for an individual development plan for a Director of Nursing.

By the end of the fiscal year, the Director of Nursing will complete cross-training in the Emergency Department to increase staffing flexibility, improve efficiency and teamwork, better enabling her team to meet and exceed our patients' need for safe, quality nursing care.



Slide 25

Slide notes: To find learning opportunities at NYC Health and Hospitals, go to the Insider...



Slide 26

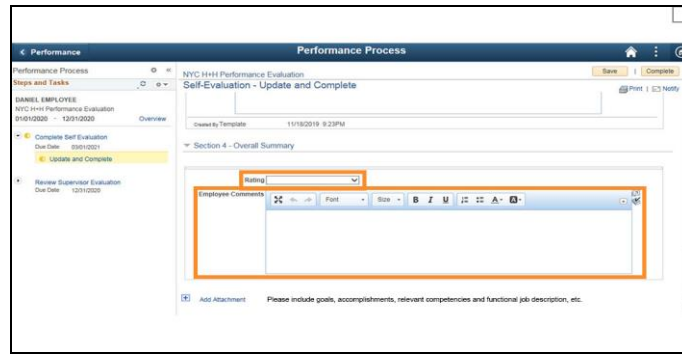
Slide notes: ...to access the Learning Academy.



Slide 27

Slide notes: On the Learning Academy, explore the courses which are updated regularly.

Here is a tip. You may want to bookmark this page.



Slide 28

Slide notes: Scroll to Section 4, and use the drop down arrow to select your Overall rating.

Note in the Employee Comments box, you may enter a statement about your self-rating.




Slide 29

Slide notes: To document your accomplishments, use the STAR technique.

Start by describing the Situation. Describe the Task that needs to be accomplished.

Describe the Action that you took. And describe the Results of your actions.

Complete - Accomplishments Example



Director
OB / GYN Practice

Access to Care System Goal

Situation: Decrease in the number of deliveries by pre-natal patients in the OB practice.

Task: Improve engagement of current pre-natal patients & establish new relationships with community providers.

Action: Establish partnerships with neighborhood clinics, ambulette services, & local community practices to create a targeted community pre-natal care-to-delivery outreach program.

Result: Increased awareness of pre-natal-to-delivery services & increased OB deliveries in the OB practice, increasing the number of deliveries by 2%.

Slide 30

Slide notes: Let's take a look at an accomplishment example for a Director of an OB practice.

The system goal is about access to care.

The situation is a decrease in the number of deliveries by pre-natal patients in the OB practice, which can lead to reduced revenue and continuity of care for the pregnant patient.

The task is to improve engagement of current pre-natal patients and establish new relationships with community providers to have their patients deliver their babies at the OB practice.

The action taken is to improve retention of current pre-natal patients and establish partnerships with neighborhood clinics, ambulette services, and local community practices to create a targeted community pre-natal care-to-delivery outreach program.

The result is increased awareness of pre-natal-to-delivery services and increased OB deliveries in the OB practice, increasing the number of deliveries by 2% in the upcoming year.

Non-Clinical Employee Accomplishments Example



Director
Population Health

Care Experience System Goal

Situation: Participation in Plant Based Lifestyle was low in the second half of the year.

Task: Generate new ideas, materials and incentives that would result in at least a 15% increase in participation from the year.

Action: Designed a new promotional packet and highlighting the program's benefits through community board meeting and community based organizations. I also set-up a webinar to share the information for those who were not able to attend meetings.

Result: Increased program enrollment by 20 percent over the same period last year.

Slide 31

Slide notes: Let's take a look at a another accomplishment example for a Director of Population Health.

The system goal is about the care experience.

The situation is the participation in the Plant Based Lifestyle program dropped by 10 percent in the past year.


The task is to generate new ideas, materials and incentives that would result in at least a 15 percent increase in program participation.

The action taken is to designed a new promotional packet and highlighting the program's benefits, then distribute at community board meetings and local community based organizations.

In addition, webinars were hosted to share the information for those who were not able to attend meetings.

The result was in increased program enrollment by 20 percent over the same period last year.

Non-Clinical Employee Accomplishments Example



Senior Director
Revenue Cycle
Administration

Financial Sustainability System Goal

Situation: Processing time of invoices was taking three months between receipt of goods and services.

Task: Increase invoice processing efficiency to one month.

Action: Monitored, compiled and analyzed data on invoice processing time and found that proper documentation was not provided causing increased processing delays.

Result: 20% reduction in processing time through the additional training and linking to supporting documents on an intranet site.

Slide 32

Slide notes: Let's take a look at one more accomplishment example for a Senior Director of Revenue Cycle Administration.

The system goal is Financial Sustainability.

The situation was the invoice processing time was taking three months between invoicing and receipt of goods and services.

The task was to increase invoice processing efficiency to one month.

The action taken was to monitor, compile and analyze data on invoice processing time.

It was found that often proper documentation was not provided to process the invoice, thereby causing increased processing delays.

The result was a 20% reduction in invoice processing time, through the additional employee training and linking to supporting documents on an intranet site.

The screenshot displays a web application interface for performance management. The main window is titled "Performance Process" and "NYC H4H Performance Evaluation". The current step is "Self-Evaluation - Update and Complete". The interface includes a sidebar with navigation options: "Steps and Tasks", "Overview", "Complete Self Evaluation", "Update and Complete" (highlighted), and "Review Supervisor Evaluation". The main content area shows a "Section 4 - Overall Summary" with a "Rating" dropdown menu and an "Employee Comments" text area with a rich text editor toolbar. Below the text area is an "Add Attachment" button with a red arrow pointing to it, and a note: "Please include goals, accomplishments, relevant competencies and functional job description, etc."

Slide 33

Slide notes: After you are finished entering your accomplishments in the Employee Comments box, next select your Overall rating.

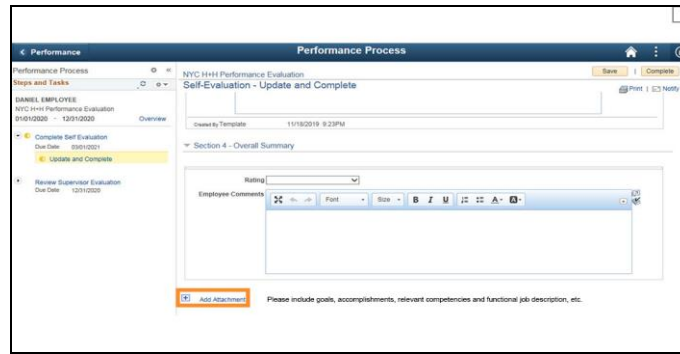
You also have the option to attach supporting documentation related to your accomplishments.



Slide 34

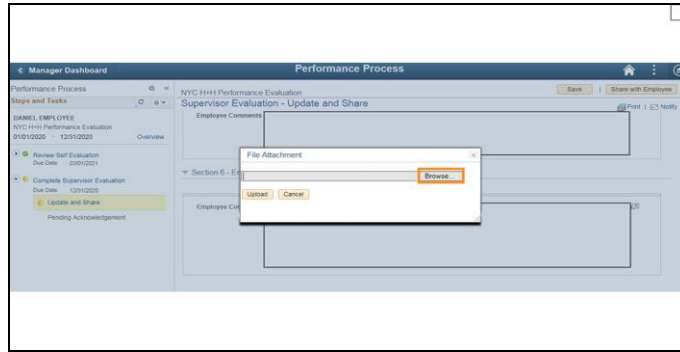
Slide notes: These attachments can be a detailed list of accomplishments, or work samples that demonstrate an your contributions to your role, for example presentations, project plans, or a reports created in Excel.

In addition, you may attach other supporting documents, like a functional job description, job-specific competencies, certificates of completion, and recognitions.



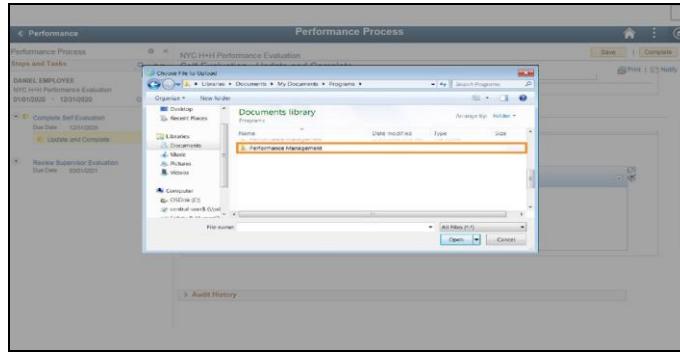
Slide 35

Slide notes: Let's see how to attachment a document in PeopleSoft. Click on the Add Attachment link.



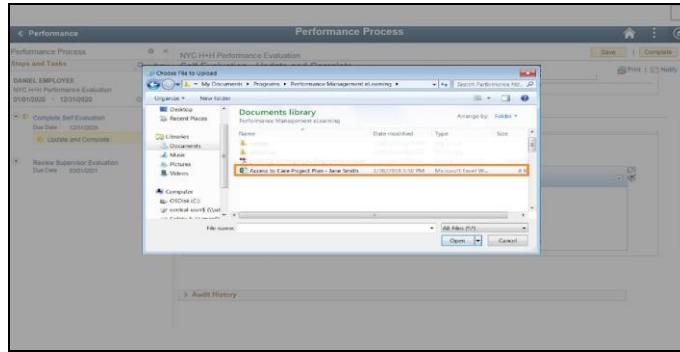
Slide 36

Slide notes: Click the Browse button to search for the file to attach.



Slide 37

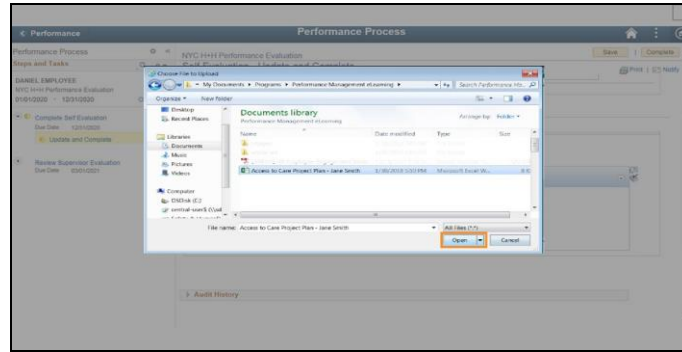
Slide notes: Go to the file location.



Slide 38

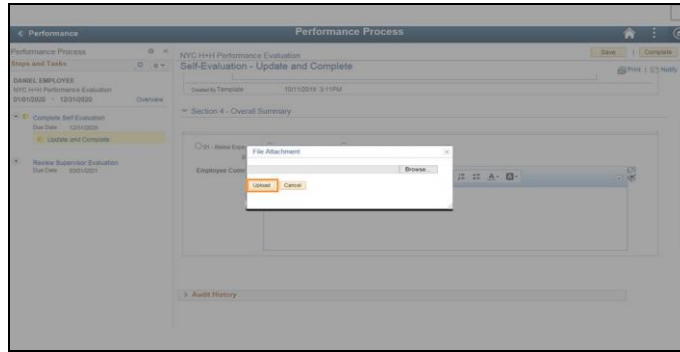
Slide notes: Select the file to be attached.

Performance Management



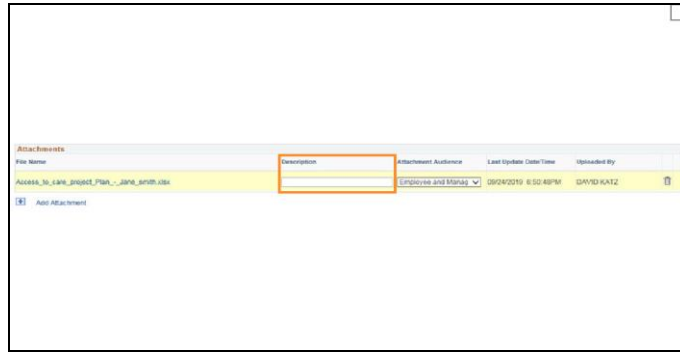
Slide 39

Slide notes: Click the Open button.



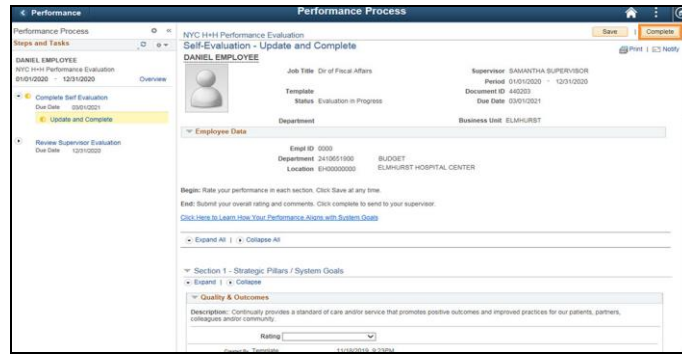
Slide 40

Slide notes: Click the Upload button.



Slide 41

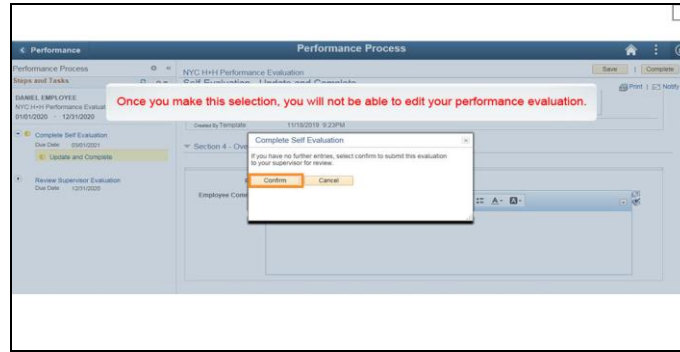
Slide notes: You have the option to enter a file description.



Slide 42

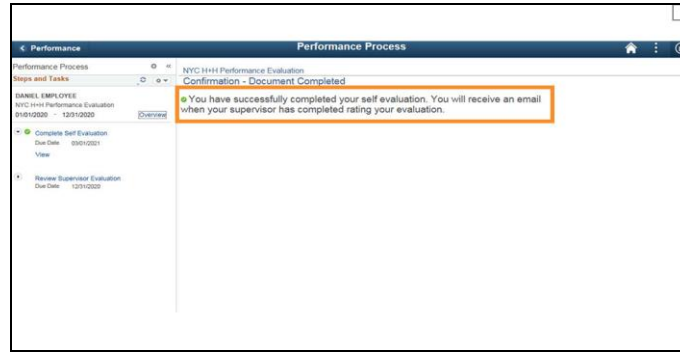
Slide notes: Once you have entered your self-ratings, comments, and supporting documentation, let's see how to complete and share your performance evaluation with your supervisor.

Click the Complete button to electronically submit the performance evaluation to your supervisor.



Slide 43

Slide notes: Click the Confirm button. Once you make this selection, you will not be able to edit your performance evaluation.



Slide 44

Slide notes: This message confirms that you have successfully completed your self-evaluation.

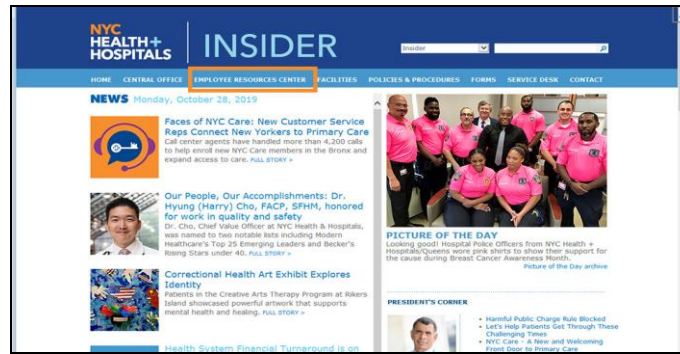


Slide 45

Slide notes: The next step is for your supervisor to evaluate your performance.

As a supervisor, you have two ways to view a direct report's performance document.

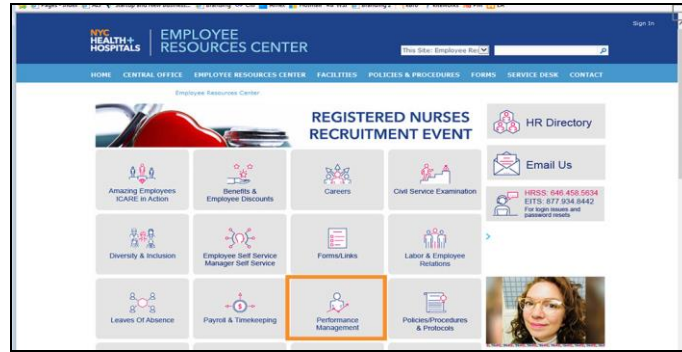
Either click the link in the email sent to you to start the performance evaluation process.



Slide 46

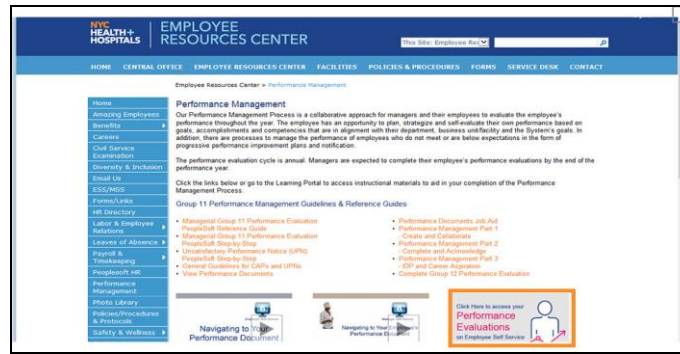
Slide notes: Or go to the Menu bar on the Insider and click the Employee Resource Center link.

Performance Management



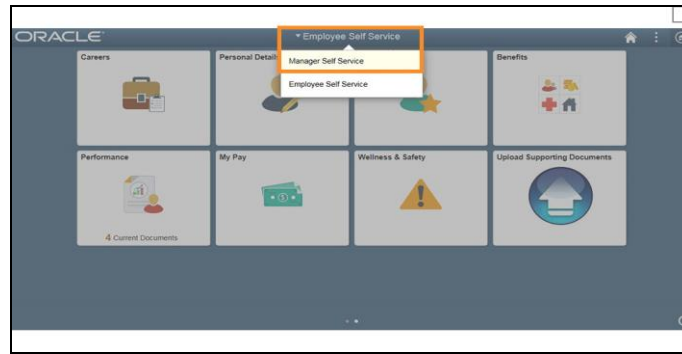
Slide 47

Slide notes: Click on the Performance Management tile.



Slide 48

Slide notes: And then click on the Performance Evaluations tile to open PeopleSoft.



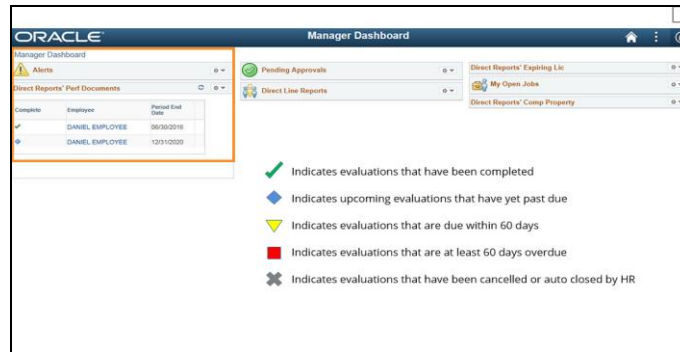
Slide 49

Slide notes: Click on Employee Self Service the drop down drop to select Manager Self Service.



Slide 50

Slide notes: Click on the Manager Dashboard tile.

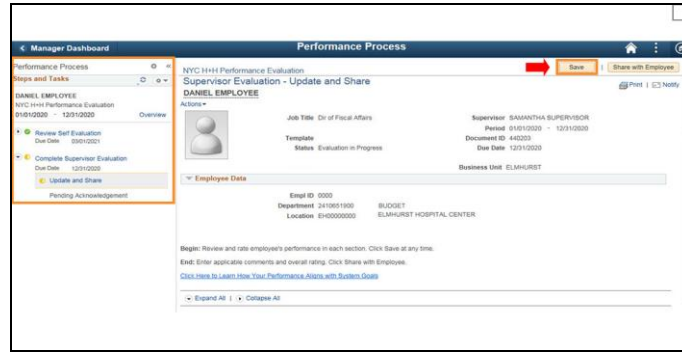


Slide 51

Slide notes: Under the Manager Dashboard, go to the Direct Reports' Performance Documents section.

You will see a checkmark next to each employee with a completed performance evaluation.

Here is a legend of other statuses that you may see next to an employee's name, including completed, upcoming, due within 60 days, 60 days overdue, or cancelled or auto closed by Human Resources.



Slide 52

Slide notes: In the Steps and Tasks area, you will see the status of the direct report's performance document.

Here's a tip - It is a best practice for you to save your work periodically.



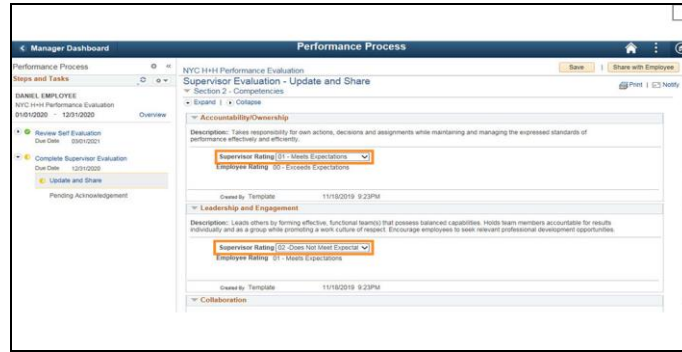
Slide 53

Slide notes: Now the supervisor's and employee's versions of the performance evaluation are merged.

Each section now displays the direct report's self-rating and a location for you to rate the employee on each Strategic Pillar, System Goal, and Competencies, as well as a location to provide an Overall rating.

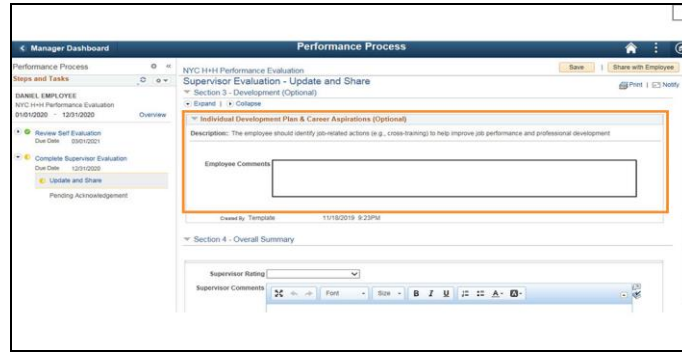
Use the drop down arrow to rate your direct report's on the Strategic Pillars and System Goals.

If you find that your direct report's role does not support a specific Strategic Pillar or System Goal, you have the option to select Not Applicable.



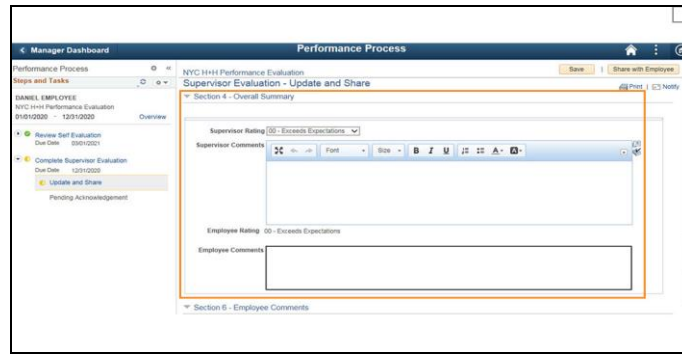
Slide 54

Slide notes: Next use the drop down arrow to rate your direct report's competencies.



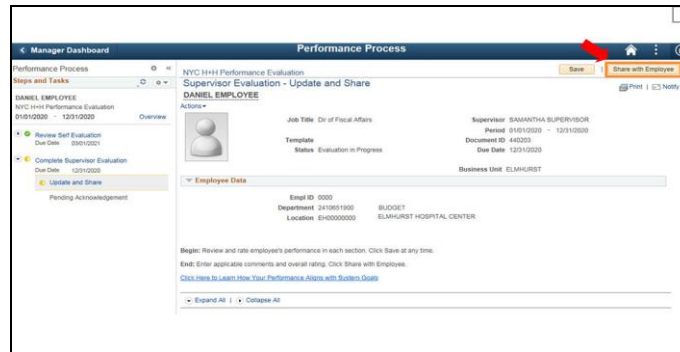
Slide 55

Slide notes: As a supervisor, you are able to view an employee's individual development plan and career aspirations.



Slide 56

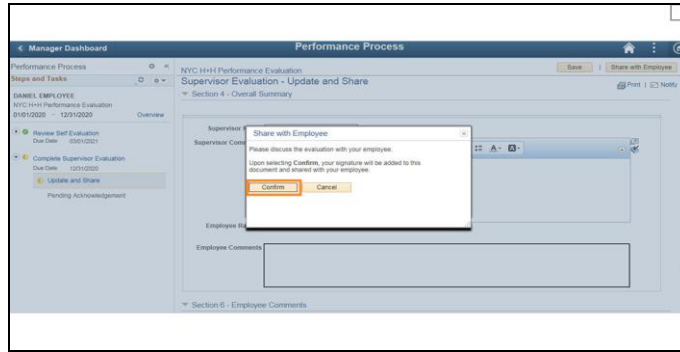
Slide notes: In Overall Summary, you have your own section to provide an overall rating using the drop down arrow, as well as you have the ability to add comments and add attachments.



Slide 57

Slide notes: As supervisor, you can save your work and then electronically share the performance document by clicking the Share with Employee button, so that your direct report may acknowledge the performance evaluation.

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 a Facility Performance Manager to make your employee's performance evaluation available for editing.



Slide 58

Slide notes: Click the Confirm button.



Slide 59

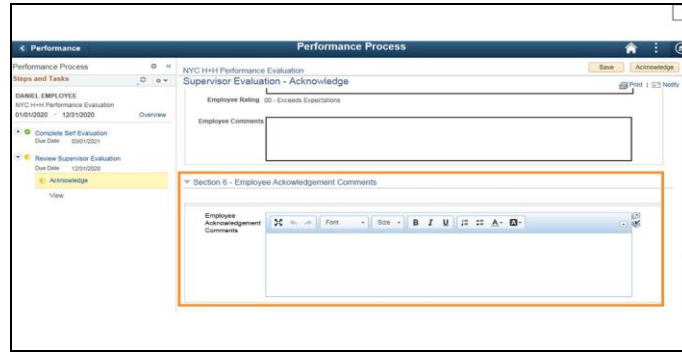
Slide notes: Click the Manager Dashboard back arrow at the top left to return to the Manager Dashboard.



Slide 60

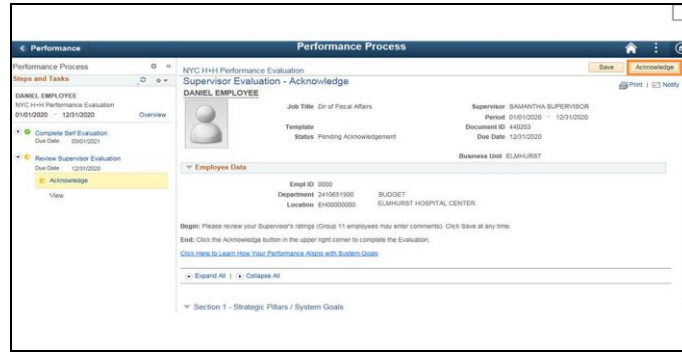
Slide notes: You, as an employee, will receive, an email with a link to view you're completed performance evaluation for you to acknowledge.

Alternatively, you can access the performance document through the Employee Resources page under Performance Management.



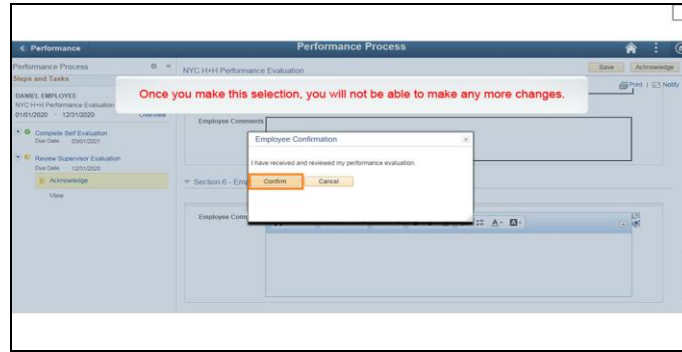
Slide 61

Slide notes: Before you acknowledge your performance evaluation, you have the option to enter any comments in Section 6 Employee Acknowledgement Comments.



Slide 62

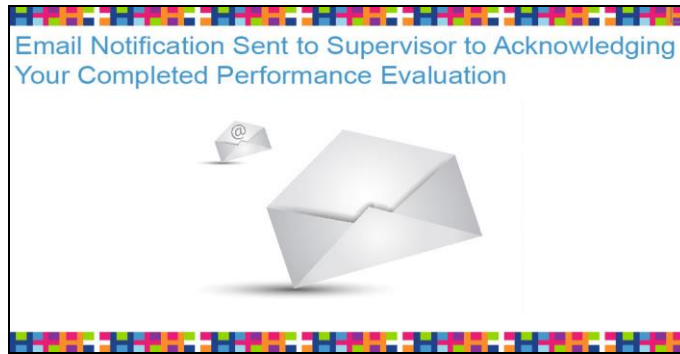
Slide notes: Next let's see how acknowledge your performance evaluation. To do so, click the Acknowledge button to begin the digital acknowledgement process.



Slide 63

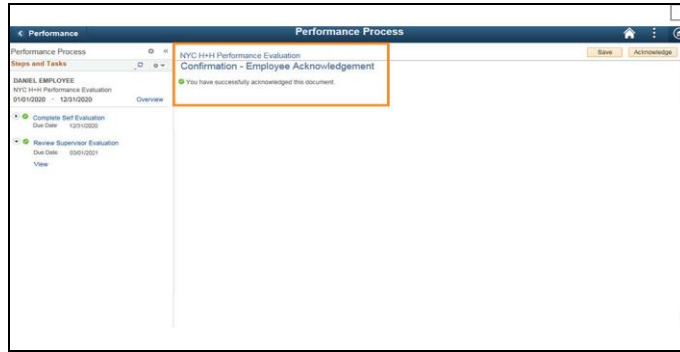
Slide notes: Click the Confirm button.

Once you make this selection, you will not be able to make any more changes.



Slide 64

Slide notes: After you acknowledge your performance evaluation, your supervisor receives an email with a link to view the completed performance evaluation.



Slide 65

Slide notes: Both you and your supervisor are able to view the completed performance evaluation in PeopleSoft HR.



Slide 66

Slide notes: This completes the Performance Management Process for managerial employees and their supervisors.

The process remains the same each year.

To view any updates to the Strategic Pillars and System Goals, go to the Employee Resources Center, under Performance Management to view the most recent information.

Congratulations

You have completed the Performance Management for Managerial Employees.

You may take a screenshot of this page for your training records.

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


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

Voiceover Provided by

- Deborah Shea

Images from [freedigitalphotos.net](#)

- Ambro
- Fantassista
- Stockimages

& 

The slide features a colorful, multi-colored border at the top and bottom. The text is centered and uses a mix of blue and black fonts. There are several icons: a PDF icon, a small red square icon, and a logo for 'Learning Brothers'.

Slide 67

Slide notes: Congratulations. You have completed Performance Management for Managerial Employees.

For any questions about the performance management process, go to the Employee Resources Center under Performance Management to view supporting documents about the performance management process.

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