MyPSDP
Performance Success and Development Process

2014 SMU Review Form 2-4 Training

MyHIRE
(Recruiting)
MyHIRE provides a streamlined recruitment experience by providing a web-based application and employment tracking process from the initial application through onboarding.

MyPSDP
(Performance)
The Sutter Health Performance Success & Development Process (PSDP) streamlines and improves goal setting, succession planning and performance management/measurement.
Training Topics

Click on any of the links below to jump straight to that section.

- Logging into MyPSDP
- Accessing the Performance Review
- Review Form Overview
- Requesting Feedback
- Completing the Self Assessment
- Completing the Supervisor Evaluation
- Finalizing the Review
- Accessing the Completed Review
- Support Information
Logging into PSDP
Pre-Login Screen

https://sutterhealth.taleo.net

Step 1: This is a Pre-Login Screen. After reviewing, select OK

Step 2: At the User Sign In window, Enter **Username** and **Password**

Step 3: Click the **Sign In** button

Important login information:
- You will have 5 attempts to login before being locked out of the system – if locked out call the Help Desk at 1-888-888-6044
- The system auto saves every 10 minutes
- You will be logged out of the system after 30 minutes of inactivity
Step 4: Click the Performance tab in the top left hand corner
Step 1: In the "My Tasks" area click the Write employee review task to view it’s details
Step 1
The Review tab (also known as the Overview page) displays General Information, Review Instructions and review form Section links.

Step 2
Click the Show Details button to view Author and Supervisor information.

Step 3
The Overview or Table of Contents in the left panel gives you access to the various sections within the Review.

Step 4
The circles in each section of the Overview represent 2 things - 1/2 of the circle fills when you complete the rating in that section and 1/2 fills when you complete the comment. If a section of the review does not have a rating or comment that half will not fill.
**Step 5**
Use the **Previous** and **Next** buttons to page through the Review Form Sections

**Step 6**
You can also use the **Overview** or **Table of Contents** links to jump to various sections of the Review
Step 7
The **Workflow** tab shows all the steps the review must go through in order to complete the review process.

**NOTE:** When a step has been completed, the step circles will display in green.
Step 8
To save the review, select the **Save** icon toward the top left corner of the review

Step 9
To print the review or any parts of the review, select the **Print** icon toward the top left corner of the review
Step 10
A separate **Print Options** window will display, choose which sections you would like to print, whether or not you would like to include things like the Instructions or Feedback and whether or not you would like to display empty rating and comment fields.

![Print Options window](image)

**NOTE:** Select the Additional Information option to include the Accountabilities in the print preview.

Step 11
Select the **Print** button to display a Print Preview.
Step 12
A separate window will open with the review as a .pdf file, allowing you to select File and then Print to print the review form.
Requesting Feedback

Step 1
Select the Ask For Feedback button from the top right corner of the review form, located within the Show Tools panel.
Requesting Feedback

Step 2
Choose who you would like feedback from

Step 3
Choose which sections you would like feedback on

Step 4
Update/edit the comments if necessary

Step 5
Select the Send button

NOTE: Accountabilities will not be viewable by the feedback recipient. Copy and paste applicable Accountabilities into the comment section for feedback.
Step 6
Once Feedback is received, the feedback will be viewable to the recipient only in the Show Tools panel

Step 7
To add the feedback comments into the review and make them visible to the employee and approver, highlight them

Step 8
Next drag and drop into the Comments area of the review form and edit/update as necessary
Step 1
From the **Overview** tab, locate and click the link titled **Principal Accountabilities** to access the first section of the review or choose the **Access the review** button.

**NOTE:** The supervisor and employee can begin working on the review at the same time.
Step 2
You will need to enter the Accountabilities from the job description into the review form. Click on the Principal Accountability links or click on the Next button to enter each accountability (this can also be done by your supervisor)
Completing the Self Assessment
Principal Accountabilities Section

Step 3
Choose a Rating

Step 4
Enter the Principal Accountability Description (there is a 1,000 character limit)

Step 5
Click on the Next button and continue until you have entered and rated all Principal Accountabilities
Step 6
Review the Instructions and then click the Overall Principal Accountabilities Rating link or the Next button to move to the next page
Completing the Self Assessment
Principal Accountabilities Ratings Section

Step 7
Select a Rating

Step 8
Enter Comments regarding overall performance in the Principal Accountabilities area

Step 9
Click on the Next button and continue to the next section

NOTE: The system automatically spell checks comment field text by underlining misspelled words in red. Right click the misspelled word to view and select correct options.
Completing the Self Assessment
How Results Were Achieved Section

Step 10
In the **How Results were Achieved** section review the instructions and use the **Next** button to page through, rate and comment on each performance category.
Step 11 Select a Rating that best reflects performance in regards to that standard

Step 12 Enter Comments

Step 13 Click the Next button to page forward and continue until done rating and commenting on each performance category
Completing the Self Assessment

Overall Performance Rating Section

Step 14
In the **Overall Performance Rating** section, enter **Comments** regarding your Overall Performance

**NOTE:** The employee’s overall rating is calculated and displayed (but not editable) based on the ratings chosen throughout the self assessment.
Completing the Self Assessment
Overall Performance Rating Section

Step 15
Save the review

Step 16
Once you have completed the entire review, click the Send to Supervisor button.
Completing the Self Assessment
Overall Performance Rating Section

Step 17
Enter any additional Comments you would like to add to the review (Note: Once you click OK, a Comments tab will be added after the Workflow tab in your review)

Step 18
Click the OK button

Step 19
A new window will open letting you know the task was completed successfully, click the OK button
Step 1

Follow the same steps outlined for the Self-Assessment. The Supervisor’s Rating and Comment fields will be on the left-hand side of the review.

**NOTE:** The supervisor and employee can begin working on the review at the same time. Ratings and comments will not be visible to the supervisor until the review is submitted to the supervisor by the employee.
Step 1
The **Rating** which best reflects overall performance has been calculated for you

You can choose to override the **Overall Rating** and document it in the **Comments** field. Once you do, an eraser icon will appear next to the **Overall Rating**, clicking the icon will allow you to return the rating back to the **Calculated Rating**

**NOTE:** The Overall Rating field will not calculate or display a rating until the Supervisor has rated the review
Completing the Supervisor Evaluation
Overall Performance Rating Section

Step 2
In the **Overall Performance Rating** section, enter **Comments** regarding Overall Performance, especially if you override the rating.

Step 3
To enter Development Activities, click **Save**, then click the **Module** drop down arrow and highlight **Development Plan**.

**NOTE:** For additional instructions on entering development activities, please reference the **Appendix** section.
Completing the Supervisor Evaluation
Overall Performance Rating Section

Step 4
Scroll down to view the Ratings Summary area. You can click on the links to return to the section to make edits if necessary.

**NOTE:** This area will not display ratings for sections with multiple ratings or with no ratings.
Completing the Supervisor Evaluation
Overall Performance Rating Section

Step 5
To verify all language used in comments is appropriate, click the Run Language Checker option in the Actions drop down.

Step 6
Save the review.

Step 7
Once you have completed the entire review, click the Send to One Up for Approval button.
Step 8
Enter any additional Comments you would like to add to the review. **NOTE:** These comments become a permanent part of the review and can be seen by all participants in that review. Once you click OK, a History tab will be added after the Review tab.

Step 9
Click the OK button.

Step 10
A new window will open letting you know the task was completed successfully, click the OK button.
Finalizing the Review
One Up Approval Step

Step 1
The **Overall Rating** is displayed on the Overview tab for the One-Up Approver’s convenience. Select **Show Details** to review the Section Summary Ratings or select the **Access the review summary** button to page through every page of the review.
Step 2
To route the form to the next step, click on the **Approve/Send Back for Edits** button
Step 3
Enter any additional Comments you would like to add to the review. NOTE: These comments become a permanent part of the review and can be seen by all participants in that review. Once you click OK, your Comments will be added to this step in the History tab (audit trail) of the review.

Step 4
Click the Approve button, or choose the Reject button to send the review back to the supervisor for edits.

Step 5
A new window will open letting you know the task was completed successfully, click the OK button.
Finalizing the Review
Performance Discussion/Supervisor Acknowledgement

Step 1
At this point, you will have the Performance Review Discussion with the employee. Once that meeting has taken place, click the Acknowledge & Send to Employee button to Acknowledge the Review and route it to the Employee for Acknowledgement.
Finalizing the Review
Performance Discussion/Supervisor Acknowledgement

**Step 2**
Enter any additional **Comments** you would like to add to the review. **NOTE**: These comments become a permanent part of the review and can be seen by all participants in that review. Once you click **OK**, your **Comments** will be added to the **History** tab in the review.

**Step 3**
Click the **OK** button.

**Step 4**
A new window will open letting you know the task was completed successfully, click the **OK** button.
Finalizing the Review
Employee Acknowledgement

Step 1
To Acknowledge the review form click the **Acknowledge & Complete** button
Step 2
Enter any additional Comments you would like to add to the review. NOTE: These comments become a permanent part of the review and can be seen by all participants in the review. Once you click OK, your Comments will be added to the Comments tab and are accessible by all who participated in this review.

Step 3
Click the OK button.

Step 4
A new window will open letting you know the task was completed successfully, click the OK button.
Step 1
As an employee all of your reviews will remain in the Reviews area, even once completed.

Step 2
For the Supervisor and One Up, to access an employee’s completed Performance Review form, click on the More link on your Employee Center Home Page.

NOTE: The supervisor will receive an email when the review has been completed by the employee.
Support Information

- For Information or Support on the Process Contact:
  HR representative Elaine Lemay at 510-869-6739

Call:
Help Desk at 916-363-2233 or 1-888-888-6044 for password issues
or
Employee Support Line at 916-297-8300 or 855-398-1631, option 3 for all other support