MyPSDP
Performance Success and Development Process

2014 SMU Review Form 5-8 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
- Attachments
- 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
Logging into PSDP

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

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

DESIGN ENHANCEMENT: **Attachments** can now be added to an employee’s Self-Assessment. Only the employee can add or delete an Attachment. Only one Attachment is allowed per review form. Examples of an Attachment include metrics reporting, project plans, and client feedback.

**Step 1**
From the **Show Tools** panel, click on the **Attachments** bar at the bottom of the panel.

**Step 2**
From the **Attachments** bar, click the Add button. Select a file to attach. The file size must not exceed 1024 KB or 1 MB. Only the following file formats are allowed: .doc, .docx, .pdf, .xls, .xlsx, .rtf, .txt

Comments help identify the purpose of the file, especially if it is not clear from the filename.
Step 3
Confirm the correct file displays in the Attachments panel. To delete an Attachment, click the drop down arrow then click Delete.

The file is attached at the review level, not at individual review items. Attachments can be viewed by anyone who has access to the review. You can mouse over the comment bubble to display the comments in their entirety. Like other events, adding and removing Attachments is included in the History tab.
The supervisor will see an Attachment once the employee has submitted the self-assessment.

To view:
• Click on Attachments bar from Show Tools panel
• Comments tab to access applicable notes
• History tab to view Attachments Added event
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section

Step 1
From the Overview page, locate and click the link titled What was Achieved – Dashboard Outcomes 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.
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section

- Goals are populated in the review from the goal plan – no longer required to navigate to the goal plan
- Comments entered in the goal plan will display in the review
- Enter goal updates in the review only, do not update the Goal Plan
- Goals can be added and removed from the review
Step 2
Use this section to review the detailed goal information or to add or remove a goal from the review; to add or remove click the **Manage Section Items** button.
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section

Step 1
To create a new goal click the **Create** button in the dialogue box

Step 2
Add Goal title and description into the dialogue box

Step 3
Click the **OK** button
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section

Step 1
To add a goal from a goal plan click the **Add from Goal Plan** button in the dialogue box.

Step 2
Click the drop down arrow next to **Goal Plan Year**, choose the desired goal plan year and click **Refresh**.

Step 3
Highlight the desired goal and click the **Select** button to add it to the review.
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section

The selected goal has now been added to the bottom of the Goals list

Step 4
Click the Done button

Step 5
To review the goal details, select the Next button to page through the section
Completing the Self Assessment

What was Achieved – Dashboard Outcomes Section

Step 1
Review the goal plan fields and update as needed

Step 2
Scroll to the Comment section; click the Add button to enter comments specific to the goal

Step 3
Select a rating from the Rating drop down

Step 4
Click Next to page forward and continue until all goals have been rated and commented upon, as needed
Completing the Self Assessment
What was Achieved – Dashboard Outcomes Section Summary

Step 1
Click Show Details to display the instructions

Step 2
Review the goal weights and ratings and make updates to from summary page (Note: All goal weights combined should total 100%)

Step 3
The employee’s overall rating is calculated and displayed (but not editable) based on the ratings chosen throughout the self assessment

Step 4
Click Next to proceed to the next page
Completing the Self Assessment
How Results Were Achieved Section

**Step 1**
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.

**Instructions**
The Performance Categories are included in this section.
1. Click on the links below or the **Next** button to open each category.
2. Select a rating from the drop down menu for each item.
3. Provide specific examples to support the rating in the comment fields. **Comments are required in this section.**
4. Click the **Next** button to move to the next page.

**Competencies**
- Diversity Action Plan
- Encourages Diverse Perspectives
- Inclusive Practices
- ...
Completing the Self Assessment
How Results Were Achieved Section

**Step 2**
Select a Rating that best reflects performance in regards to the category.

**Step 3**
Enter Comments

**Step 4**
Click the Next button to page forward and continue until all performance categories have been rated and commented upon.

**NOTE:** Ratings and comments are required for each performance category.
Completing the Self Assessment

Overall Performance Rating Section

**Step 1**
Click **Show Details** review the instructions

**Step 2**
The **Rating** which best reflects overall performance has been calculated for you based on the ratings chosen throughout the self assessment

**Step 3**
Enter a comment in the **Comment** field

**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
Overall Performance Rating Section

Step 4
Save the review

Step 5
Once you have completed the entire review, click the Send to Supervisor button.

NOTE: The employee’s overall rating is calculated and displayed (but not editable) based on the ratings chosen throughout the self assessment.
Step 6
Enter any additional Comments you would like to add to the review (Note: Once you click OK, a Comments tab will be added to your review to display the comments)

Step 7
Click the OK button

Step 8
A new window will open letting you know the task was completed successfully, click the OK button
Completing the Supervisor Evaluation

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 2
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.
Step 3
In the Overall Performance Rating section, enter Comments regarding Overall Performance, especially if you override the rating.

Step 4
To enter Development Activities, click Save, then click the Module drop down arrow and highlight Development Plan to navigate to the plan.

NOTE: For additional instructions on entering development activities, please reference the Appendix section.
Step 5
Scroll down to view the Ratings Summary area. You can click on the section links to return to the section to make edits if necessary.
Completing the Supervisor Evaluation
Overall Performance Rating Section

Step 6
Save the review

Step 7
To verify all language used in comments is appropriate, click the Run Language Checker option in the Actions drop down

Step 8
Once you have completed the entire review, click the Send to One Up for Approval button

NOTE: The employee must submit their self assessment prior to submitting the review to the One Up approver
Step 9
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 to the review.

Step 10
Click the **OK** button

Step 11
A new window will open letting you know the task was completed successfully, click the **OK** button.
Step 1
The **Overall Rating** is displayed on the Overview tab for the One-Up reviewer’s convenience. Select **Show Details** to review the Section Summary Ratings or select the **Access the review summary** button to view the summary page.

Step 2
To page through all pages of the review, click the **What was Achieved** section link and click **Next** to navigate page by page.
Finalizing the Review
One Up Approval Step

Step 3
To route the form to the next step, click on the Approve/Send Back for Edits button.
Finalizing the Review
One Up Approval Step

Step 4
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 5
Click the Approve button, or choose the Reject button to send the review back to the supervisor for back for edits.

Step 6
A new window will open letting you know the task was completed successfully, click the OK button.
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.
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.
Step 1
To acknowledge the review form, click the **Acknowledge & Complete** button.
Finalizing the Review
Employee Acknowledgement and Review Completion

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 **Comments** 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.
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
For Information or Support on the Process Contact:
Elaine Lemay - HR representative

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