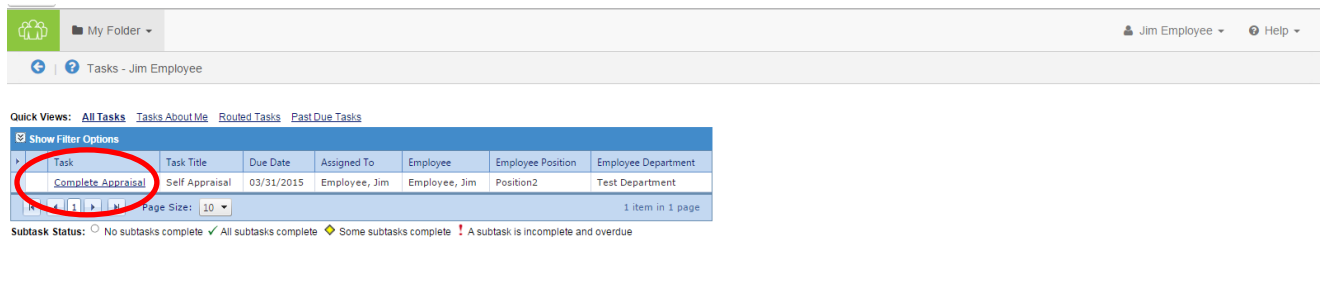


Department Leadership Login and Self-Appraisal Access

1. Go to
<https://pfm.healthcaresource.com/performance/login.aspx?c=douglascountywi>
2. If registered, Login with username and password
 - a. If not registered. Click “Register” and proceed through registration process
(You will need your employee ID number for this!)
3. After signing in you will see a page similar as follows



Quick Views: [All Tasks](#) [Tasks About Me](#) [Routed Tasks](#) [Past Due Tasks](#)

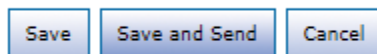
Show Filter Options

Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department
Complete Appraisal	Self Appraisal	03/31/2015	Employee, Jim	Employee, Jim	Position2	Test Department

Page Size: 10 1 item in 1 page

Subtask Status: No subtasks complete All subtasks complete Some subtasks complete A subtask is incomplete and overdue

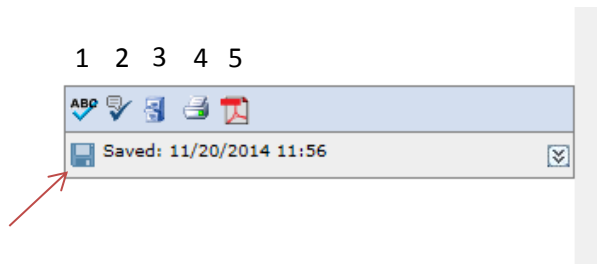
4. The task list will have an appraisal titled “Appraisal” in blue. If you have already clicked the appraisal before it will be titled “Complete Appraisal” (as seen above)
5. Upon opening the appraisal, please read all instructions as well as the scoring ratings before beginning the evaluation.
6. At the bottom of the evaluation form page will be three options:



7. “Save” allows you to save the form and exit for later completion. Automatic saving will be in effect every minute but this feature creates the ability to save immediately after editing and exit.
8. Complete the evaluation and click “Save and Send” to forward the evaluation on to your supervisor for review.
9. “Cancel” will back you out of the form without saving (within a minute) and return you to the home page screen.

Scroll Box tips

A useful feature of the Healthcare Source software is a box located on the right side of the screen that will drag down as you scroll from question to question.



This feature has many useful tools to assist in the completion of the evaluation form.

1. Spell Check- Helps with grammar in comment boxes
2. Language Checker- This will highlight “questionable” language to be considered for rephrasing. This allows employees to avoid using offensive terms or derogatory slangs.
3. Filing Cabinet- Allows for manager uploaded files to be opened and viewed in one organized space. Individuals can copy and paste from these documents into comment boxes if needed.
4. Print- Prints page with current markings, ratings, comments, etc.
5. PDF- allows evaluation form to be saved into a PDF file

The save icon (red arrow) allows the evaluator to save progress at any time. Automatic saving is done every minute but the save option can be useful to ensure a comment is saved in the event a computer failure occurs.

This box can be used throughout the evaluation process and be very helpful to the person completing the evaluation.