Supervisor—Adding Notes/Feedback, Goals, Documents, & Succession
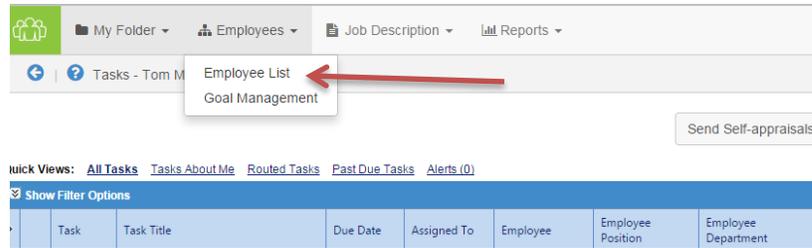
1. Login in to Performance Manager through HealthCare Source website
   https://pfm.healthcaresource.com/performance/login.aspx?c=douglascountywi
   (See "Supervisor Login and Self- Appraisal Access" for additional login assistance)
2. Click on the tab titled "Employees". A drop down will appear, enabling you to select "Employee List"

3. A list of your current employees will be provided as well as links to assist you in adding Feedback, Goals, and Documents.
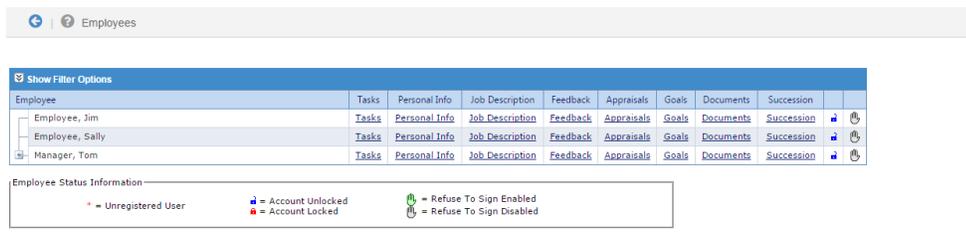
4. Click on the link with the title you are looking to add to. (You will have further access to these tabs after selecting one of them—See picture below)
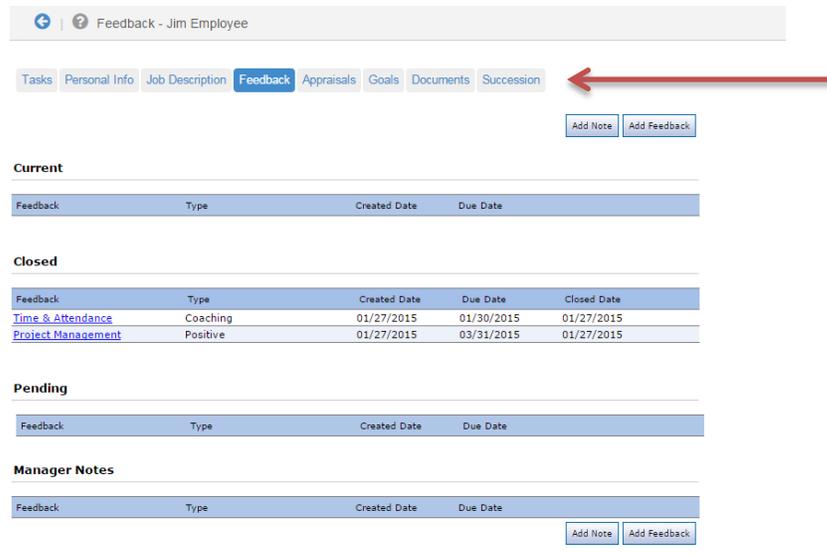
NOTES/FEEDBACK-----

5. In the "feedback" tab, select "Add Note" if you would like to add information about an employee profile for your personal reference. (This information is **NOT** viewable to employees)

6. Select "Add Feedback" if you would like to provide information that **can be seen** by the employee. (This is <u>discoverable</u> information that stays with the Employee!)
    a. The three types of feedback include
        i. Positive
        ii. Coaching
        iii. Corrective

7. Complete the feedback process and select "Send to employee" to allow them to see your comments about the feedback that has been added to their profile.

8. Employees will then sign off after reviewing the feedback and it will be saved automatically online in their "feedback folder"

GOALS

9. In the "Goals" tab, you will see any previously created goals as well as be able to add new goals by selecting "Add Development Goal" (see image below)
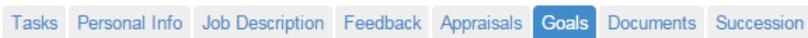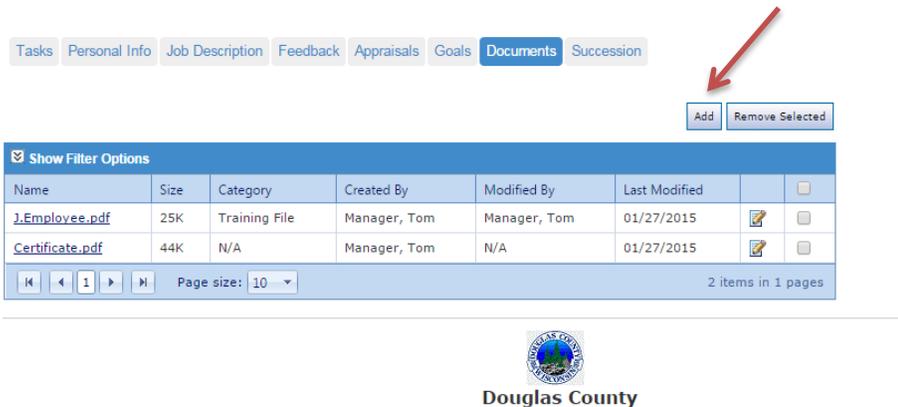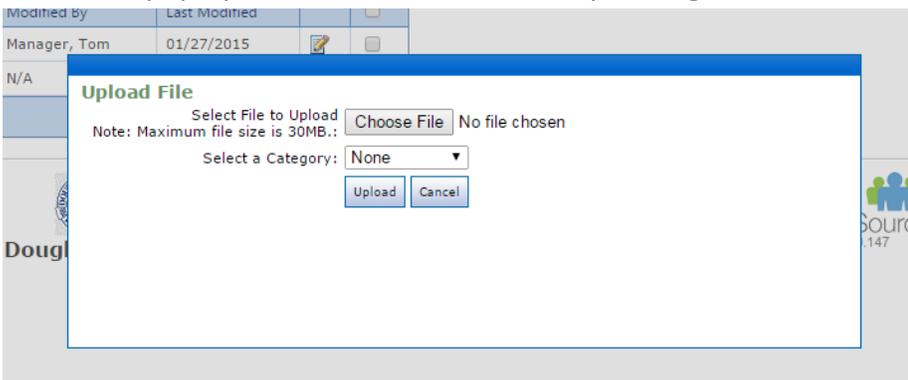

10. Complete the goal information and select "Save and Send" to allow employee review. The new goal will have been added to the employee profile.

DOCUMENTS

11. In the "Documents" tab, select the "Add" button to upload a document saved to your computer

12. Follow the pop-up box instructions to finish uploading a document.

SUCCESSION (NOT Visible to Employee)

13. In the "Succession" tab, select "Add Succession" to begin. This process allows you categorize employees and organize them as they relate to succession planning.
14. Complete the "Add Succession" instructions and select the save disk in the lower right hand corner when complete to add info to employee profile.