# PERFORMANCE MANAGEMENT

## LEADER FAQS – PERFORMANCE MANAGEMENT

### Purpose

These frequently asked questions (FAQs) can help provide answers and guidance to team members regarding performance reviews, Talent Connect, and more. Click a link below to find answers to questions related to that topic.



## Performance Review: General questions

**Can leaders document coaching conversations and corrective action in Talent Connect?**

The performance review should encompass all feedback, both positive and areas of opportunity. Prior to entering coaching or corrective action feedback, be certain you are connecting with your HR (Human Resource) Representative.

**When are Performance Reviews due?**

The deadline for 2023 reviews is March 1, 2024. There are **no extensions** for the 2023 Performance Year.

**What is the cutoff date for team members who will not need a performance review for the performance year in question?**

*For the 2023 Performance Year*, any team member hired October 1st or later will not need a performance review for 2023. The cutoff date may change year-to-year. Leaders should continue to have 30- and 90-day conversations with team members hired after October 1.

**Are there different cutoff dates for different team member groups?**

No, all forms are launched on the same date.

**Should team members complete a self-evaluation?**

A self-evaluation is encouraged but not required. The self-evaluation form is found in Talent Connect and is due by December 31, 2023.

Encourage your employees to go into the Talent Connect system and complete a self-evaluation. Find Self-Evaluation Information here.

**Should 360 Feedback be used as part of the Performance Review process?**

The 360 Feedback process is built into Talent Connect and is an optional, collaborative process between the team member and their leader. For more information on the 360 Feedback process, see the 360 Philosophy and FAQs.

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**Will the leader get a final copy of the performance review once the team member acknowledges it?**

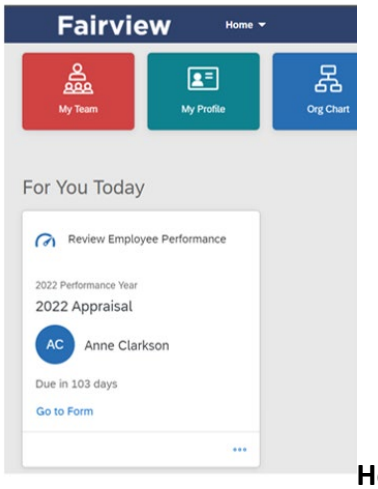
Yes, completed reviews will be available in the leader and team member's *Completed* folder in Talent Connect.

**What if I have many direct reports? Can others assist me with writing and conducting the performance conversation?**

Yes. Talent Connect allows you to share the review process with an Alternate Reviewer. **This should only be done under the following circumstances:**

1. You have more than 50 team members
2. You expect to be on Leave of Absence (LOA) during the performance review cycle
3. You have a team member who transferred to your team, and you want feedback from their previous leader

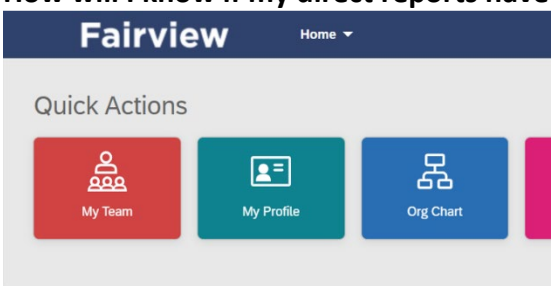
You can find out more about the Alternate Review process here.




**How do I know if I have tasks to complete in Talent Connect?**

If you have tasks to complete, you will see a **To Do** tile on your home screen.

**How will I know if my direct reports have tasks to complete?**




The **Manage My Team** tile will indicate if you have direct reports that require attention.

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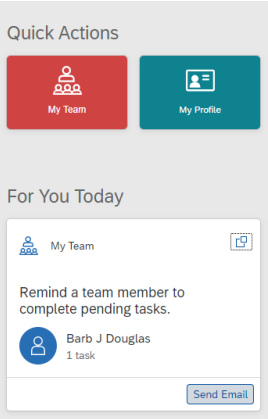
**How do I know which tasks my direct reports need to complete?**

If you click into the list, you will see any tasks that need to be completed.




**Is there a way to remind my team members they have tasks due?**

A leader will receive what is called a 'Nudge Card' when their direct report has overdue items in the 'For You Today' section. You will see this as a task on your homepage. This will send an email from Talent Connect to that team member using the template below. You can modify and cc yourself on this email.

**Is there a way to track completion for my team through Lawson?**

Yes, there are reports available through Lawson Manager Self-Service in Workforce Metrics in the **Goals** section.


## Team member Acknowledgement of Performance Review

**When a leader signs off on the performance review, when does the team member get a copy?**

Once the form is acknowledged by the team member, the form is considered complete and will be available in the leader and team member's **Completed folder** in Talent Connect.

**Can leaders print a paper copy for team members to sign?**

No, team members must acknowledge their performance review in Talent Connect.

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**Should I share the most up to date job description with the team member at the 1:1 performance conversation?**

Yes, an important part of the process is the conversation between the manager and the team member to discuss the performance review content, job description and expectations. The team member will electronically acknowledge that they have reviewed the job description.

**What if a team member is unable (ex. leave of absence) or refuses to acknowledge the review?**

An important part of the process is the conversation between the manager and team member to discuss the performance review content, job description, and expectations. One step includes the electronic acknowledgement by the team member. If the team member is unable (ex. leave of absence) or refuses to complete this action, please make a note as to the circumstances and attach it to the team member's record in Talent Connect. The review will be left in acknowledgement status until it is automatically moved to completion on the designated due date.

### Review for Team members Who Transfer Departments

- **Reviews for a team member who transferred to your department *mid-year*:**

  Since the review encompasses the entire performance year, reaching out to the previous leader to get feedback would be beneficial.

  Use the Alternate Reviewer feature to send a team member's review form through Talent Connect to their previous leader for feedback. More information on the Alternate Reviewer process can be found here.

- **Reviews for team members who transferred to your department at the *end of the year*:**
  - If the team member transferred toward the end of the performance review year, it is important to ask the previous leader to do a written assessment of the team member's performance prior to transferring to your team. You should use the Alternate Reviewer process in Talent Connect to gather this feedback. It may even be helpful for the previous leader to participate in the 1:1 performance conversation.

- **Reviews for team members who transfer in *January*:**
  - You do not need to write the review for the previous performance year if that team member did not work on your team during that time. However, you do need to help ensure that the review is completed. Collaborate with the team member's previous leader, who is responsible for completing the review.
    - Use the Alternate Reviewer process in Talent Connect to have the team member's previous leader complete the performance review. More information on the Alternate Reviewer process can be found here.
    - For the 1:1 conversation, the previous leader may conduct the meeting individually with the team member or both you and the previous leader can meet with the team member; or you can meet individually with the team member and share the previous leader's feedback.

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### Reviews and LOA

**What if a team member is on a Leave of Absence (LOA)? When should I complete the review?**

If a team member will be on LOA during the performance review, the leader should complete the review and advance it to the acknowledgement stage. The leader should plan on sharing the review within 1-2 weeks of the team member's return to work.

**What if a manager is on a LOA? Is someone else able to complete the reviews?**

Yes. You may use the Alternate Reviewer feature in Talent Connect. Reviews must be completed by another people leader. More information on the Alternate Reviewer process can be found here.

### Goals

For general Goals FAQs, please see more information on the OD&L website.

**Once goals are entered, how will leaders pull them into the Performance Review form?**

Organizational goals will automatically populate in the Performance Review form. Once leaders begin Performance Reviews, goals that were previously added into Talent Connect will already be available. Leaders and Team members can also add new goals or edit goals in the performance review form.

**How do you add goals in Talent Connect?**

Please see Entering and Cascading Goals in Talent Connect.

**If team members update their progress to goals in Talent Connect throughout the year, will leaders be able to see it?**

Yes. Leaders should have regular check-ins with their direct reports regarding their progress to organizational and development goals. Use the Comment box for each goal to record progress and conversations.

**What is a Cascaded Goal?**

A cascaded goal is the preferred method of creating a goal and assigning it to your team. Documentation on www.odandl.org in the Performance Management section has instructions for how to create a cascaded goal.

### Pay

Please speak to your leader to ask specific questions regarding pay and watch for updates from your usual channels (ex. Leader News) for more information.

### Ratings

Please see Performance Management Ratings Information.

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**My team member's final rating seems higher than I thought it would be. What happened**?

The review is weighted, so Performance to Goals is 33%, Daily Work is 33%, and Commitments make up 34% of the overall rating.

Behind the scenes, Talent Connect calculates the overall rating based on how each goal and commitment category is rated. There is a rounding process in the formula that will occasionally round a team member's overall rating up. A leader must select a final rating for each team member. In most cases you will accept the system rating, but you have the latitude to select the rating you believe best represents your team member's performance.

### Regulatory and Compliance

**The performance review policy requires ongoing competency review for clinical staff. Is that included?**

The annual performance review meets regulatory requirements for competency review.

### Scope – Who is included?

**How will Talent Connect be applicable to physician practices where the non-physician administrators manage the Lawson items but not the performance reviews?**

Physician leaders will follow the same process for their Physician and Advanced Practice Provider direct reports as non-physician leaders.

**Is the same form for step-in-grade team members? How about Union team members?**

The process is the same for all team members.

**Is the same form used for casuals? What if it is their secondary (aka level 2) position?**

First and second level (also known as primary and secondary) reviews will have unique forms and are titled to designate the level. All forms are available in Talent Connect, regardless of FTE (Full Time Employee).

If a team member has more than 2 positions, the leader(s) of positions 3 and higher will be notified about the process from the Team member Relations Team.

**What is the cut off hire date for performance reviews in the current performance year?**

Team members hired October 1st or later during the performance year in question will not require a performance review.

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### Talent Connect System

**How is the Talent Connect website accessed?**

Please see the Performance Review User Guide.

**Are Directors able to see their supervisor's direct reports reviews in Talent Connect?**

No. Only the direct leader can see a team member's performance reviews, ratings, and comments.

**Where do we find resources for words and phrases when writing a performance review?**

The Writing Assistant in Talent Connect will help you with writing examples for each of the Fairview Commitments.

**Am I required to provide written comments?**

No. Comments are not required but are encouraged. Your team member has contributed for a year and deserves feedback on their strengths and opportunities.

**Can edits be made after the 1:1 conversation and before the team member acknowledges?**

Yes, the entire performance review document is editable by the leader until the leader clicks **Confirm 1:1 Meeting** and the review moves to the Team member Acknowledgement step.

**Can leaders print a copy of the performance review?**

Leaders can print (or create a pdf copy of) a review at any time in the process by clicking on the print icon in the upper right-hand corner of Talent Connect.

**Why am I getting a nudge to complete something when I am done with everything?**

Leaders who have direct reports who are also leaders, will get a nudge when that leader has items left to do.

### Other

**Will leaders be asked to document all 1:1 meetings with team members in Talent Connect?**

Leaders must click a button acknowledging they completed a 1:1 discussion about the performance review with each team member.

**Is 360 Feedback going to be expected or a tool suggested for use during the FPR process?**

A 360 Feedback process is integrated directly into Talent Connect. It is an optional, collaborative process between the team member and the leader. More information on the 360 Process can be found here.

**How are reviews written for float pool staff that work with multiple leaders?**

The primary leader assigned in Lawson should write the review and collaborate with other leaders to gather feedback.

**What is the best web browser to use to see the icons in Talent Connect?**

Answer: Chrome.

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