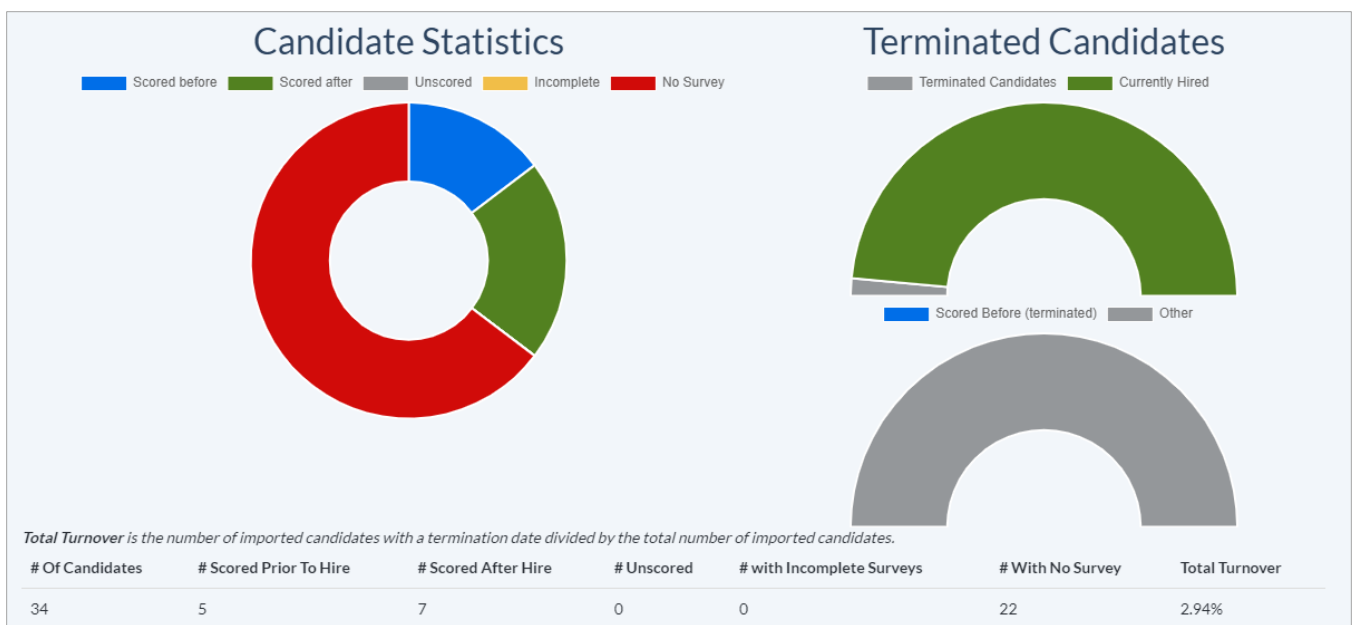


# Turnover Summary Report and Dashboard

Employee retention and turnover are among the biggest challenges facing healthcare organizations today. It's now more important than ever to identify any areas afflicted with high turnover rates and do what's needed to address any weaknesses.

Thankfully, symlr Leadership Assessment now includes the Retention Report and Dashboard. These new features offer expanded turnover reporting capabilities, making it easier than ever to determine common factors that could be contributing to your employees leaving (or staying). After identifying these elements, you can then work on reinforcing the departments, people, or roles needing it most.



## What is it exactly?

The Turnover Summary Report summarizes turnover data, imported via an Excel spreadsheet, to allow you to quickly view your employee retention and turnover criteria. In addition to the visual display, the report also generates a downloadable spreadsheet containing all the turnover data for each employee. This spreadsheet also includes employees' Staff Assessment survey scores to allow further analysis, enabling you to examine any potential correlations between Assessment scores and retention data (among other things).

This report, when examined with its exported Leadership Assessment survey scores, can be used to show utilization of the Leadership Assessment system during the hiring process, and any potential correlation between survey scores and staff retention.

The Retention Dashboard makes use of your already-imported turnover data and provides deeper capabilities than the Turnover Summary Report. Up to a full year's worth of turnover data can now be queried across all uploaded Retention/Turnover files (within the previous five years) to provide a more comprehensive representation of who's staying and who's going.

### Retention Dashboard

Search Criteria ^

Number of Candidates: 4  
Date & Time: May 12, 2023 at 3:27 pm (EDT)

Date Range: 06/30/2018 - 06/30/2019

[Show Details](#)
[Print List](#)
[Export](#)
[Start Over](#)

Results ^

Name (Last, First)	Job Family	Manager	Job Performance	People Orientation	Task Orientation
Samplemore, Sally	Manager	Acorn, Sally	8.5	7.0	9.0
Sample, Sam	Charge Nurse	Hoff, Dave	6.5	7.0	6.0
Tester, Tommy	Charge Nurse	Crumz, Edwina	7.0	5.0	9.0
Jonese, Riley	Charge Nurse	Bernard, Angela	8.0	8.0	9.5

## How do I use it?

Once activated, users complete the report generation process from the *Reports* page. After uploading a spreadsheet file containing your employee turnover data (in .csv format) and mapping column headings to field names, the data is processed.

Generate New Report

A report can be generated after quickly and easily assigning your field names.

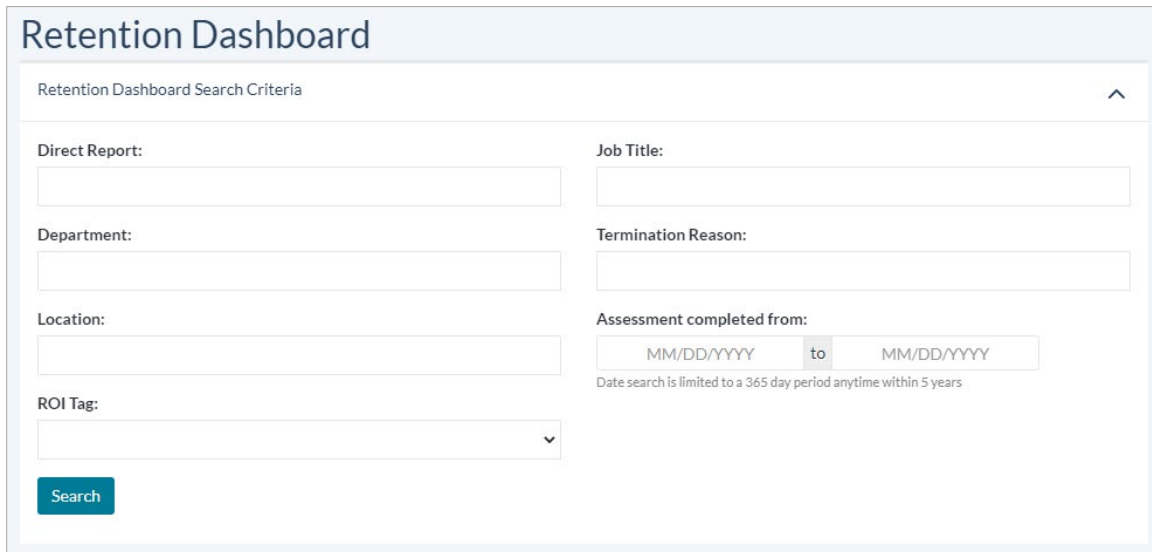
### Retention/Turnover Data Import Status Data Files

File Name	Total Rows	Processed	Uploaded at	Processed File	Status	Summary
import_retention_template.csv	3	0	2023-05-12 15:43:26	Process Now!	Mapped	Process file first
62f510ba4191f.csv	4	4	2022-09-01 06:59:34	roi_data_631090965d640.csv	Saved	<a href="#">Generate Summary</a> <a href="#">Graphs</a>
import_retention_template (18).csv	3	3	2023-04-18 09:52:42	roi_data_643ea0aacd96a.csv	Saved	<a href="#">Generate Summary</a> <a href="#">Graphs</a>
import_retention_template.csv	3	2	2022-12-03 23:38:30	roi_data_638c244605687.csv	Saved	<a href="#">Generate Summary</a> <a href="#">Graphs</a>

SAVE TO:	< don't save column >	< don't save column >	< don't save column >
HEADER:	First Name	Last Name	Full Name
1:	Tom	Tester	Tester, Tom1
2:	test	user	user, test
3:	sally	sample	Sample, Sally
4:	a	b	b, a
5:	b	Candidate	c, b
6:	fix	six	six, five
7:	Sally	Sample-Test	
8:	Sample	Candidate	
9:	Tina	Tester	
10:	Tommy	Tester	

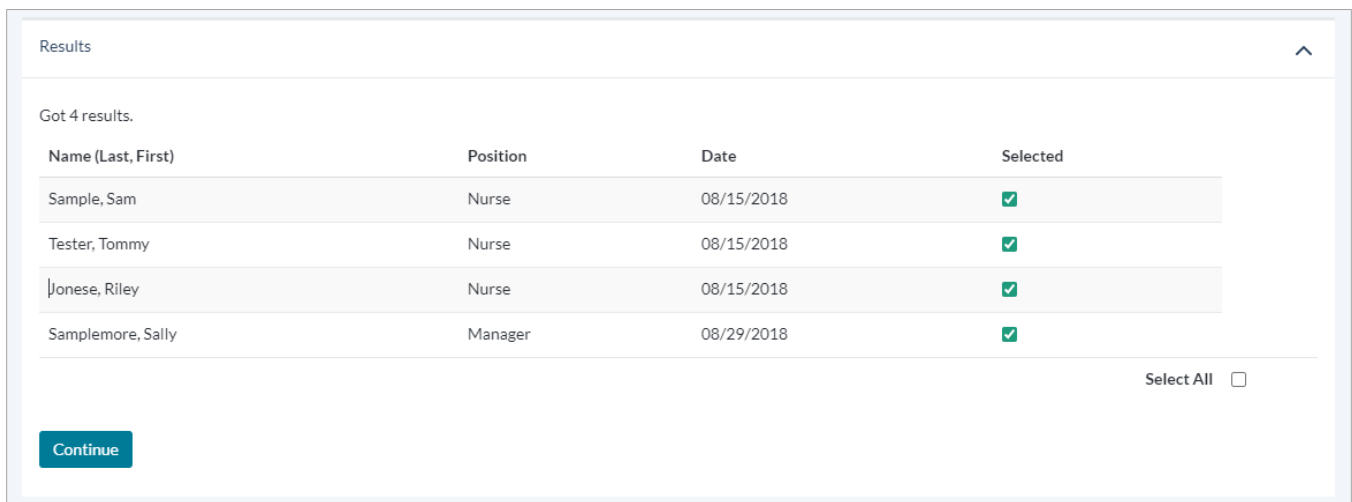
After these simple steps, your turnover summary report is available from the *Import Status* page. There are two methods of viewing this information. Clicking **Generate Summary** displays the report on-screen within Leadership Assessment. Alternately, clicking the .csv file link under the Status column lets you download a spreadsheet containing more detailed Leadership Assessment data, including each employee's assessment survey scores.

To access the Dashboard, click the **Retention Dashboard** button in the upper-right corner. This opens the search form.



The image shows a web form titled "Retention Dashboard" with a sub-header "Retention Dashboard Search Criteria". The form contains several input fields: "Direct Report:", "Job Title:", "Department:", "Termination Reason:", "Location:", "Assessment completed from:" (with a date range selector "MM/DD/YYYY to MM/DD/YYYY" and a note "Date search is limited to a 365 day period anytime within 5 years"), and "ROI Tag:". A "Search" button is located at the bottom left of the form.

To use this tool, users must have completely imported and processed at least one retention/turnover file - this ensures the appropriate data to run queries on exists in the system. After specifying the search criteria and adding a date range, clicking **Search** displays any matches (up to 200) in the lower half of the *Retention Dashboard* page. Check off any people you want to examine, then click **Continue** to display the *Results* page.



The image shows a "Results" page with a table of 4 results. The table has columns for "Name (Last, First)", "Position", "Date", and "Selected". All four rows have a checked box in the "Selected" column. Below the table is a "Select All" checkbox and a "Continue" button.

Name (Last, First)	Position	Date	Selected
Sample, Sam	Nurse	08/15/2018	<input checked="" type="checkbox"/>
Tester, Tommy	Nurse	08/15/2018	<input checked="" type="checkbox"/>
Jonese, Riley	Nurse	08/15/2018	<input checked="" type="checkbox"/>
Samplemore, Sally	Manager	08/29/2018	<input checked="" type="checkbox"/>

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On the *Results* page, there are two ways of viewing this information. Clicking **Show Details** displays the results including detailed Leadership Assessment scores. If this display turns out to be too many numbers, clicking **Show Summary** reverts to the simplified view. Additionally, clicking **Print List** lets you print out or save a PDF of the results data, including each employee's detailed assessment scores.

## The Fine Print

Nothing to worry about, just some of the finer details you should be aware of regarding this feature.

- The Retention Dashboard is available free of charge for all existing symplr Leadership Assessment users.
- Access to the dashboard is controlled by a user-level permission setting. Before activating this feature, it may be helpful to know beforehand which members, departments, and/or facilities within your organization would benefit from this feature.
- To activate this feature in your organization, please reach out to a symplr Support specialist by calling 866-323-3030 or emailing [talentsupport@symplr.com](mailto:talentsupport@symplr.com).