

Feature Overview

Performance Vitals

symplr Performance excels at capturing and maintaining performance data for employees, from goals and appraisals to compensation and succession planning – even learning and assessment integrations. However, viewing all this collected data required visiting multiple pages within the solution. But that was then.

This is now: **Performance Vitals**. Our latest enhancement provides a one-page summary overview of an entire employee’s performance profile. Displaying all the relevant information in a single view means you no longer have to click through multiple pages in symplr Performance to gather necessary data, making it easier to get a holistic view of employee performance. Finally, all employee data you need in a single location!

What is it exactly?

Performance Vitals is a summary page that provides an overview of all performance-related information for an employee. Each area of an employee’s profile is represented with a summary card displaying pertinent data for that area, and a configurable set of tiles at the top of the page highlight the most relevant parts of their profile.

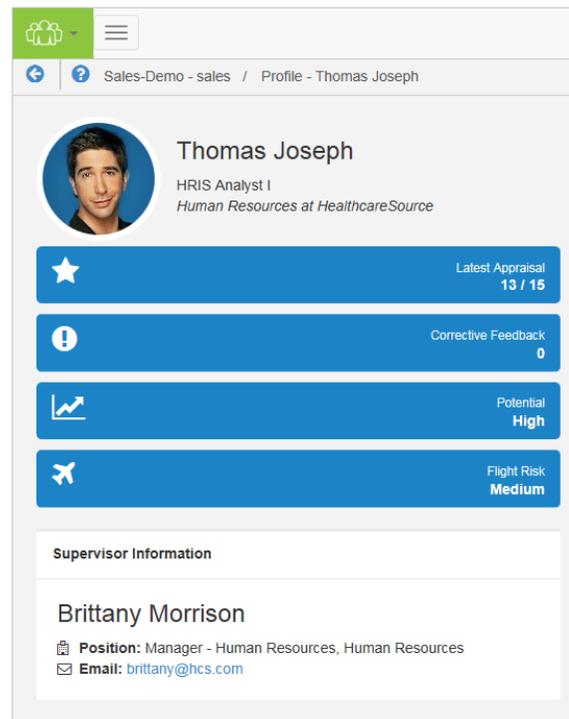
The screenshot displays the 'Performance Vitals' page for Thomas Joseph, an HRIS Analyst I at HealthcareSource. The interface includes a navigation bar at the top with options like 'My Folder', 'Employees', 'Job Description', 'Reports', and 'Admin'. The main content area is organized into several sections:

- Employee Profile:** Thomas Joseph, HRIS Analyst I, Human Resources at HealthcareSource.
- Summary Tiles:**
 - Latest Appraisal: 13 / 15
 - Corrective Feedback: 0
 - Potential: High
 - Fight Risk: Medium
- Supervisor Information:** Brittany Morrison, Manager - Human Resources, Human Resources. Email: brittany@hcs.com.
- Feedback:**
 - STAR: Positive (10/6/2016), Created By: Brittany Morrison
 - Positive patient feedback: Positive (10/6/2016), Created By: Brittany Morrison
- Development Plans:**
 - Enrich Leadership Skills: 50% (3/31/2017), Created By: Brittany Morrison
 - test: 0% (11/5/2016), Created By: Brittany Morrison
- License & Certifications:**
 - CAPM: License Issued: 10/9/2014, Expires: 10/1/2018
 - SHRM-SCP: License Issued: 3/1/2016, Expires: 12/31/2018
- Learning:**
 - Discovering What Your Customers Want: Incomplete
 - New Moms: Incomplete (Due: 1/24/2017)
 - Precepting Essentials: Adult Education: Incomplete
 - Basics of CPR: Complete (Completed: 10/11/2016)
- Appraisal:** 2016 Performance Evaluation HRIS Analyst I, Completed 10/3/2016, Score: 13 / 15
- Succession:**
 - Manager - Organization Development: Potential: High, Flight Risk: Medium, Readiness: Medium
 - Department: Human Resources, Facility: HealthcareSource
- Behavioral Assessments:** Leadership radar chart showing scores across various dimensions:
 - Achievement Orientation: 10
 - Conscientiousness: 8
 - Emotional Evenness: 6
 - Openness to Change: 4
 - Self-Confidence: 2
 - Innovating Thinking: 2
 - Multi-Tasking: 2
 - Self-Development: 2
 - Customer Orientation: 2
 - Critical Thinking: 2

This single-page view for employee data includes informational cards for all the major features available within symplr Performance, as well as pertinent information from symplr Learning for integrated clients.

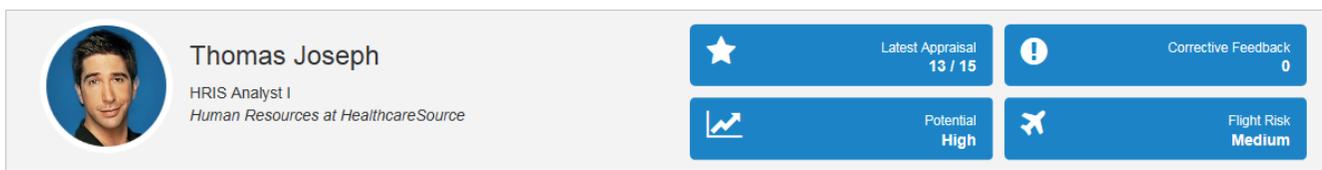
Additional integrations with symplr solutions allows you to access Performance Vitals from within symplr Recruiting as well. This allows necessary users, such as Hiring Managers, to easily access performance data on internal applicants, removing the need to contact managers for that information.

The standard view for the *Performance Vitals* page displays the informational cards in a three-column view under the initial employee profile header. However, as all symplr solutions move towards mobile compatibility, this layout automatically adjusts based on the size of the browser window – shrinking down to two columns, then eventually a single scrollable column – so you’re always able to access the information you need regardless of the size of the screen you’re currently using.



Employee Profile Header

The employee profile header at the top displays the employee name and picture (if available), as well as their current position, department, and company. (For employees with multiple positions, Performance Vitals shows their primary position at the organization.)



The tiles display key performance and profile information at a glance. Though only four tiles can display in the employee profile header at a time, there are six available informational tiles to choose from:

1. **Appraisals.** Shows the results from the most recently completed appraisal. Depending on the evaluation method used, this tile displays the Merit Rating, Total Weighted Average, or Total Score.
2. **Feedback.** Displays the number of corrective feedback items added to the employee’s profile.
3. **Potential.** Shows the employee’s potential rating from succession.
4. **Flight Risk.** Shows the employee’s flight risk rating from succession.
5. **Learning.** Displays the number of incomplete learning assignments from symplr Learning.
6. **Development Plans.** Displays the completion percentage from the most recent development plan.

Informational Cards

Just like the tiles, informational cards on the *Performance Vitals* page are also configurable. The difference here is that there is no limitation to the number of cards that can be displayed – the Performance Vitals page is able to display all eight available cards in a single view.

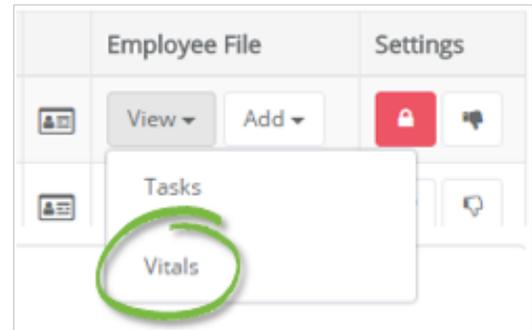
Informational cards are shown on the *Performance Vitals* page even if there is no information to display. When cards have multiple entries, a scroll bar is added to the card so all the data can be viewed without having to increase the size of the card itself.

- 1. Supervisor Information.** Lists the employee's manager and their position, department, and contact information (email and/or phone number). If an employee has multiple managers, they are all listed in this informational card.
- 2. License & Certification.** Shows the details of any licenses and certifications for the employee along with their current status.
- 3. Appraisal.** Displays details from the latest appraisal for the employee, including the name of the appraisal, related position, completion date, and scoring results.
- 4. Succession.** Displays details from all available succession plans in the employee's profile, including visual representations for Potential, Flight Risk, and Readiness for each plan.
- 5. Feedback.** Displays all feedback items in the employee's profile. Though tiles in the employee profile header only shows the number of corrective feedback items, this Feedback card shows details for all types of feedback left for the employee.
- 6. Learning.** Available for clients with integrated symplr Learning solutions, this card displays a list of incomplete and complete learning assignments for the employee.
- 7. Development Plans.** Displays all development plans in the employee's profile along with the overall completion percentage for each plan.
- 8. Behavior Assessments.** Displays the results of any assessment completed by the employee. A **radar chart** of the results helps define competencies for the employee, with overall scores available by hovering over the chart's data points. Clicking the **View Report** link opens the PDF report from the assessment in a new browser window.
- 9. 360 Review.** This card displays any 360 reviews for the employee. The card includes the schedule title for the review, the applicable employee position, the status of the review, and a due date (if the review is still in progress).
- 10. Performance Goals.** Lists performance goals the employee has completed within the past year, along with the goal's due date.
- 11. Job Descriptions.** Lists any job description the employee has signed within the past year and the date it was signed.
- 12. Compensation.** Shows all compensation cycles for the employee within the past year, along with a color-coded status of the cycle.
- 13. Training & Assessments.** Lists any training and assessment activities the employee has completed within the past year, along with the completion date and any associated credit hours.

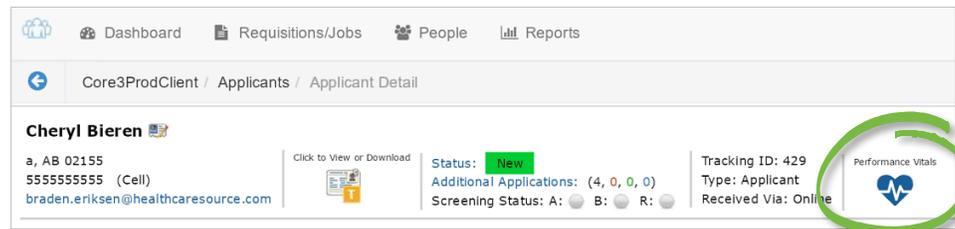
How do I use it?

Using Performance Vitals simply means opening the page for a selected employee and viewing their information. Performance Vitals can be opened from within symplr Performance and symplr Recruiting.

In symplr Performance, a new *Vitals* option is available in the **View** menu on the *Employee List* page. Selecting this option opens Performance Vitals, which resides within symplr Performance so it has the usual navigation bar and functionality at the top of the page.



In symplr Recruiting, a new Performance Vitals icon appears in the header of the *Applicant Detail* page when available for internal applicants. Clicking this icon opens a new browser window or tab displaying the *Performance Vitals* page. This new page contains the Performance Vitals information only; it does not include a navigation bar.



The Fine Print

Nothing to worry about, just some of the finer details you should be aware of as you use Performance Vitals.

- Access to Performance Vitals is limited to managers and administrators.
- Data shown in tiles and cards on the Performance Vitals page is from the past calendar year.
- The Succession tiles (Potential and Flight Risk) display values from succession plans in the employee's profile. If multiple succession plans exist, the average values from available plans is shown.
- Use of Performance Vitals is limited to clients using **EmployeeID** as a unique identifier in symplr Performance, symplr Recruiting, and symplr Learning.
- There is currently no view available for non-employees (i.e. external applicants in symplr Recruiting).
- Performance Vitals is available to all symplr Performance clients via a setting in the **Admin** area. However, access from symplr Recruiting must be configured by a symplr Support Specialist – so feel free to reach out to them via phone at (866) 323-3030, or by emailing talentsupport@symplr.com and they'll be happy to set it up.