



QUICK START GUIDE

Managing Feedback Lists

The updated Feedback feature in Performance Manager™ offers a redesigned interface and additional functionality for users. In addition, the administrative tools for managing the feature have been updated as well.

Overview

Updates to the Feedback feature include splitting the original **Title** field into three separate lists based on the type of feedback being created (Positive, Coaching, or Corrective). Each type now has a separate list of titles, which are automatically pulled into the **Title** field when a **Type** is selected.

The **Type** field determines the contents of the **Title** field.

Feedback

* Date Of Occurrence: 9/26/2014 Not applicable

* Type: Select Feedback Type

* Notification: Select Feedback Notification

* Title: Select Feedback Type First

Situation / Task: Suggested Text

0 / 3000

These three new lists are found on the *Custom Lists* page under the **Administrator** area. The *Feedback Lists* item now contains **Positive Title**, **Coaching Title**, and **Corrective Title** lists, each of which can be customized with titles that correspond to their types.

My Folder Employees Reports Administrator Schedule Job Description Support All Employees Goals Checklists			
settings custom list manager override user maintenance message center groups routing users language checker data maintenance			
Custom Lists			
	Custom List	Edit	Select
select	Checklists - Population		
select	Checklists - Rating		
select	Checklists - Validation		
select	Document Categories		
select	Eval Lists		
select	Feedback Lists		
	Title	Edit	
	Situation Task	Edit	
	Notification	Edit	
	Expected Results	Edit	
	Disclaimer	Edit	
	Action Taken	Edit	
	Feedback Instructional Text	Edit	
	Positive Title	Edit	
	Coaching Title	Edit	
	Corrective Title	Edit	
select	Goals Lists		
select	Job Description Lists		
select	Merit Rating Lists		
select	Professional Development		

The original **Title** list now populates the **Title** field when adding *Notes* to an employee record. Edits made to the **Title** list do not affect any values in the new **Positive**, **Coaching**, or **Corrective Title** lists.



Values in New Lists

In order to ensure users are able to locate the desired **Title** for feedback after the update has been released, the original **Title** list used by clients before the update has been copied into all three of the new lists.

In order to properly customize these lists, it is necessary to review each list and remove the items that do not correspond to the list type.

Example: *The original pre-update **Title** list for a client contains the value Policy Violation. Though this value is copied to the **Positive Title** list, it doesn't really apply – it only belongs in the **Coaching** or **Corrective Title** list. Therefore, the Policy Violation value should be removed from the **Positive Title** list.*

Adding Values to Lists

When adding new values to any of the Feedback lists, the **Value** and **Description** fields must match. While unmatching values still appear in the **Title** drop-down list, they do not properly record in the system database when selected.

Feedback Lists: [Rename](#)

	Value	Description	list order	Select
Edit	Attendance	.Attendance	1	<input type="checkbox"/>
Edit	Policy Violation	.Policy Violation	2	<input type="checkbox"/>
Edit	Performance	.Performance	3	<input type="checkbox"/>
Edit	Expiring License/Certification	.Expiring License/Certification	4	<input type="checkbox"/>
Edit	Non Compliant with Health/Training	.Non Compliant with Health/Training	5	<input type="checkbox"/>
Edit	Rounding Notes	.Rounding Notes	6	<input type="checkbox"/>
	<input type="text" value="New List Item"/>	<input type="text" value="New List Item"/>	<input type="text" value="7"/>	Add



The **Value** and **Description** fields must match!