



RELEASE NOTES

Performance Manager 5.0.6

Release Date: December 10, 2015

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Introduction

The Performance Manager 5.0.6 release delivers several new integrations to provide even more employee development opportunities, as well as major overhauls for existing features that greatly improve performance and the overall user experience.

Highlights of this release include:

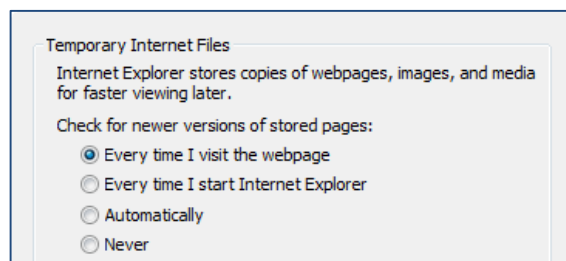
- **HealthcareSource Leadership Assessment.** Leadership Assessment is now integrated with Performance Manager, providing development reports for employees.
- **NetCompetency integration.** New NetLearning NetCompetency widgets are available for integrated clients.
- **Interface enhancements.** Checklists and the Employee List have received major updates to provide an enhanced interface and overall performance improvements.

System Requirements

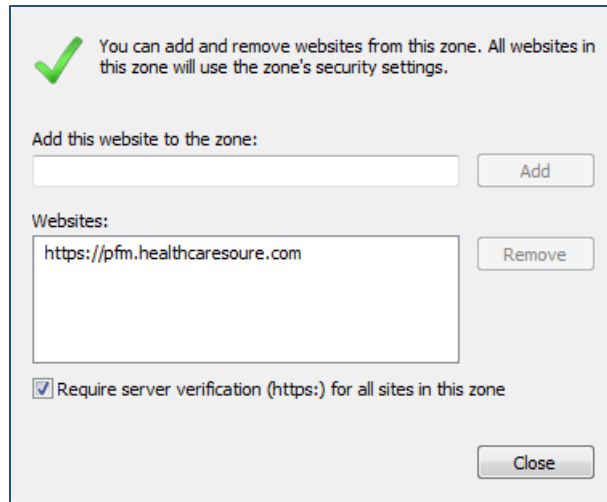
The following system specifications are the recommended minimum requirements for using Performance Manager. HealthcareSource is constantly working to expand these minimum specifications to include additional systems and browsers to ensure our customers are able to access Performance Manager from a wide range of computer setups.

Browsers: Internet Explorer 8.0 (not in Compatibility Mode)
 Internet Explorer 9.0 (not in Compatibility Mode)
 Safari 5+
 Chrome 16+
 Firefox 10+

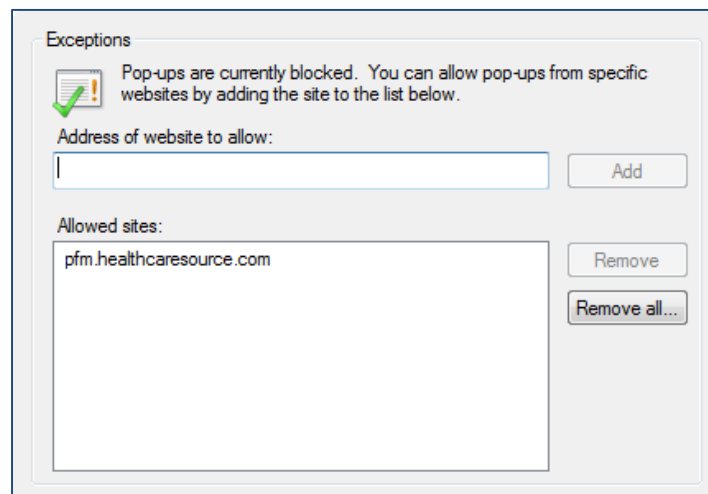
For security reasons, on shared machines you should ensure Internet Explorer is checking for a new version of the webpage with every visit. The *Every visit to the page* option should be checked under **Temporary Internet Files** settings (found on the **General** tab).



Under **Trusted Sites**, enter *pfm.healthcaresource.com* to ensure full functionality.



Under the **Privacy** setting you will have an option to adjust your **Pop-up Blocker Settings**. Make an allowance for *pfm.healthcaresource.com* by entering the web address in the field **Address of Web site to allow** and clicking **Add**.



Release Details

The enhancements listed below for Performance Manager are controlled by system-wide permission settings. Not all users will have access to the functionality as described.

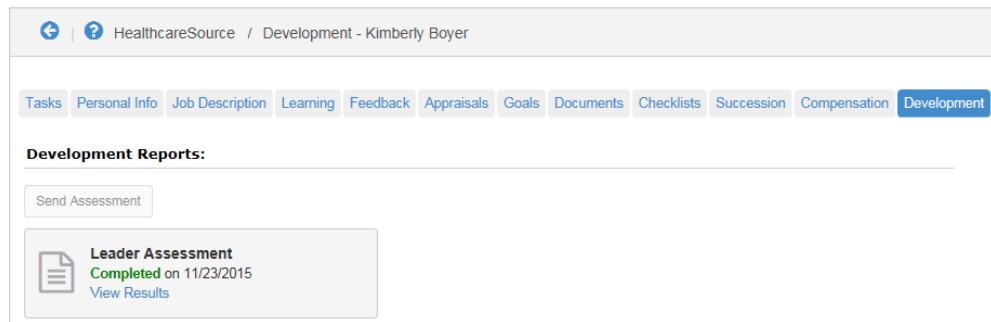
New Feature – HealthcareSource Leadership Assessment

HealthcareSource Leadership Assessments are now integrated into Performance Manager! Leadership Assessment delivers specific education and development recommendations to help prepare employees for advancement and enable managers and HR to plan for succession. This allows healthcare organizations to better prepare future leaders.

Once the integration is enabled, a new *Development* page is available in the employee profile under **My Folder**.

This page lists development reports from

assessments initiated from within Performance Manager and completed by the employee. Managers accessing this page from the **Employee List** are able to send assessments to an employee.

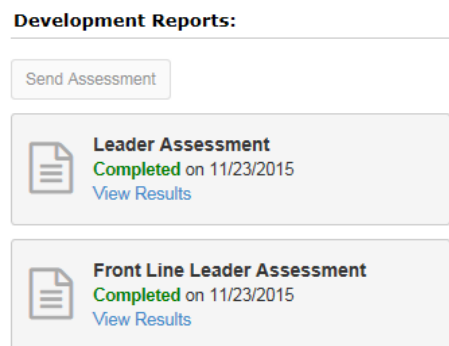


Clicking **Send Assessment** generates a new assessment request for the employee. A pop-up opens where you select the job family for the assessment. Once selected, the employee receives both an email notification with a link to the assessment, and a task within Performance Manager for the assessment.

Note: *Employees must have a work email entered into their profile in order to receive an assessment.*

Once the employee has completed the assessment, a PDF of the development report is generated and added to the *Development* page in the employee’s profile. Both managers and employees can view these development reports by clicking the **View Results** link for the desired report, which opens the PDF report in a new browser window.

Once an assessment is sent to an employee, another cannot be sent. Completed assessments can be rescored using a different job family by clicking the **Rescore** link for the desired report. When an assessment is rescored, a development report is available for each job family scored.



Clients interested in Leadership Assessment integration should contact their HealthcareSource Support representative.

Enhancements – Checklists

The Checklists feature has received performance and interface updates to provide a vastly improved user experience for validators.

Checklists now reside in a single form with expandable sections for skill groupings (as opposed to items listing on the left of the page). The headings for these groups display a number that indicates how many skills require validation. Once all the skills in a group have been completed, a green check is displayed for that group. A progress bar at the top of the form shows the completion percentage for the entire checklist.

Using the checklist form is similar to before, where validators address required fields for skills. When finished with a skill, clicking the **Complete This Item** finalizes that skill for the checklist; no further edits can be made to that specific skill. There's also a **Save This Item** button that allows you to begin work on a skill and save your progress so you can return at a later date to complete the item. The **Clear** button for a skill removes all entries you have made in the available fields.

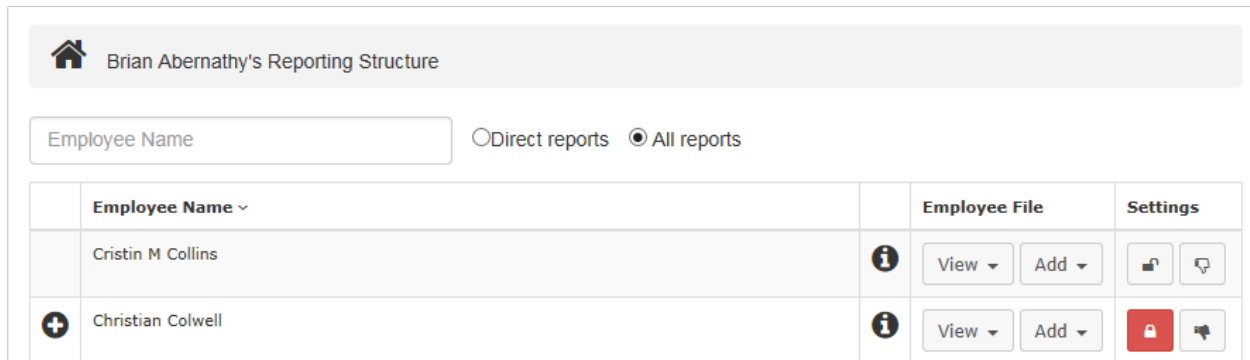
Once all skills have been marked as Complete, the checklist can be closed by clicking the **Complete Checklist** button at the bottom of the form. This generates a PDF of the completed checklist that is added to the employee's profile for viewing.

Some skills contain a Help icon (?) within the skill form. This provides *Manager Help* for the specific skill, which is opened in a pop-up window when the icon is clicked. This help text is configured by administrators when setting up skills from the *Master Lists* page under **Admin**.

Clicking the name of the employee in the form header expands the header to display the additional information about the employee. Other features of the checklist include the ability to print the form (using the print icon in the form header), and buttons that allow you to **Expand All** and **Collapse All** groupings in the checklist for quick access to items.

Enhancements – Employee List

The *Employee List* page under **Employees** has also undergone an interface overhaul to provide additional functionality and modernize the overall interface. These enhancement significantly improve the overall responsiveness of the employee list.



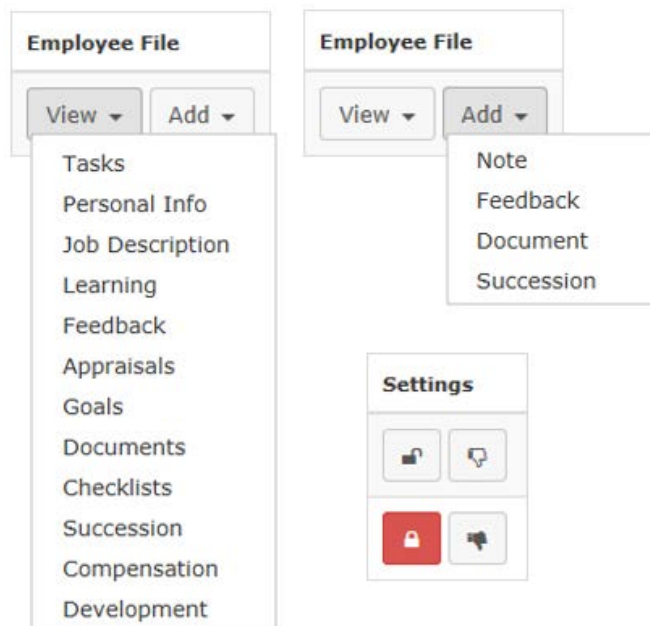
Brian Abernathy's Reporting Structure			
Employee Name <input type="text"/>		<input type="radio"/> Direct reports <input checked="" type="radio"/> All reports	
Employee Name	Employee File	Settings	
Cristin M Collins	<input type="button" value="View"/> <input type="button" value="Add"/>	<input type="button" value="Lock"/> <input type="button" value="Unlock"/>	
+ Christian Colwell	<input type="button" value="View"/> <input type="button" value="Add"/>	<input checked="" type="button" value="Lock"/> <input type="button" value="Unlock"/>	

The search field above the table provides a partial-word search on employee names. The table is automatically filtered based on each character that's entered into the search field – meaning you'll see the table update with every keystroke. Options next to the search field provide the ability to display only **Direct reports**, or show **All reports** (your direct reports AND their direct reports) listed together.

The table itself has been simplified to reduce visual clutter and made it easier to view and access employee information. An Employee File column now provides one-click access to all the available pages in the employee profile, as well as the ability to immediately add new records.

The **View** menu under Employee File lists all of the pages for an employee's record. Selecting an option from **View** opens the selected page. The **Add** menu contains the pages where you can add new records. Selecting an option from **Add** (*Note, Feedback, Document, Succession*) directly opens a blank form for the selected item. No need to open the desired page first in order to add new records.

The Settings column in the table contains toggles for locking an employee account and enabling the refuse to sign feature for an employee. A new permission has been added that controls managers' access to change both of these settings.



Employee File

View ▾ Add ▾

- Tasks
- Personal Info
- Job Description
- Learning
- Feedback
- Appraisals
- Goals
- Documents
- Checklists
- Succession
- Compensation
- Development


Employee File

View ▾ Add ▾





- Note
- Feedback
- Document
- Succession

Settings

The first column of the table contains a plus sign icon (+) when that employee has direct reports of their own. Clicking this icon reloads the table to display all the direct reports for the selected employee. When in this direct reports view, the breadcrumbs bar for the page indicates which employee's direct reports are currently being viewed. Clicking the minus sign icon returns you to the main view of the table.

 [Brian Abernathy](#) / [Christian Colwell's Direct Reports](#)




Employee Name Direct reports All reports

 Employee Name ▾	Employee File	Settings
Cory Cary	 View ▾ Add ▾	 

< < 1 > >

Page size: 10 ▾
 Displaying items 1 - 1 of 1

Finally, the informational icon in each employee row displays the employee's **Facility**, **Department**, and **Position** when hovering your cursor.

	Employee File	Settings
	View ▾ Add ▾	 
<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> Facility: Healthcaresource (201) Department: Food Services (888) Position: Cook (185) </div>		

Enhancements – NetLearning integration

Item 1: New NetCompetency widgets

Ref# 102531, 102534, 102535, 102536

Three new NetLearning widgets are now available for integrated clients with access to NetCompetency through NetLearning:

- **myValidations.** The **myValidations** widget displays validations to be completed. The two tabs available in the widget allow you to complete validations by searching for a specific **Competency** or **Learner**. Validations can be performed for multiple competencies on a single learner, or a single competency for multiple learners.
- **[NC] Assign Competency (Detailed).** Similar to the **[NC] Assign Competency** widget, this widget allows you to assign competencies to individual learners or groups. The main difference between the two is the **Detailed** widget allows you to expand rows for competencies to view individual skills for the selected competency.
- **[NC] Reports.** This widget provides managers with access to information related to both learner and competency activities, including competency assignments, progress through assignments, and tracking devices for administrators and supervisors.

Access to these widgets are controlled by NetLearning system permissions. The **My Validations** and **[NC] Assign Competency** widgets are located on the *NetCompetency* page under **Employees**. The [NC] Reports widget can be found on the *Learning* page under **Reports**.

Item 2: Widget visibility

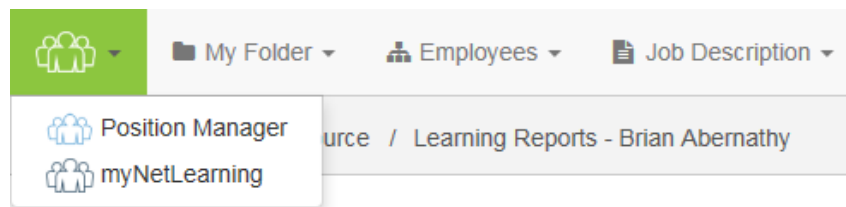
Ref# 106381

Users can no longer view widgets that they do not have permissions to use. When no widgets are available on a page, a message is displayed informing them that widgets have not been enabled.

Item 3: NetLearning navigation link

Ref# 103710

The navigation link to NetLearning in Performance Manager, found in the drop-down menu by clicking the Performance Manager logo in the navigation bar, can now be disabled so the link does not appear.



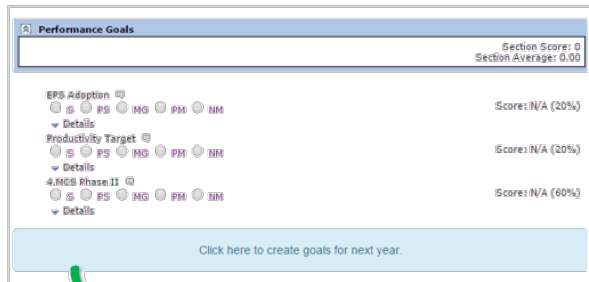
This is ideal for clients who use Performance Manager as their default landing page and want to force the use of NetLearning functionality exclusively through Performance Manager. This can be configured by a HealthcareSource Support representative.

Enhancements

Item 1: Appraisal shortcut to performance goals

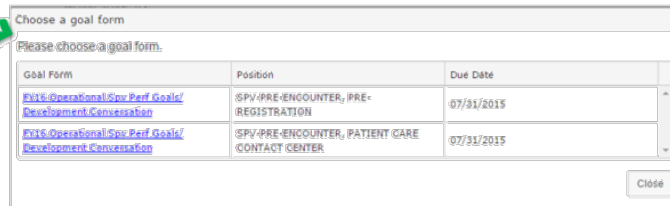
Ref# 105269

A new setting now allows managers to create new performance goals for employees directly from the appraisal form. When enabled, a new button labeled **Click here to create goals for next year** appears under the Performance Goals section of the appraisal form. Clicking this button opens a pop-up window displaying any unapproved performance goal forms for the employee.



Once a goal form is selected, managers can edit any existing goal for the employee, as well as add and approve goals.

If the employee does not have unapproved goal tasks, the pop-up window displays a message stating, “[EMPLOYEE NAME] does not have an unapproved goal form at this time.”



This feature, which is enabled by default, is controlled by a setting found under the **Goal Settings** section on the *Settings* page under **Admin**.

Additional items

The table below lists additional improvements. These items include changes or modifications that may or may not be actively displayed to end users.

Ref#	Page or Area	Description
106996	Checklists	A max character limit of 5000 characters has been added to the Comments field for checklists.
104678	Schedules	Schedules can now be assigned to a Manager group that consists of all users in the default Manager role in Performance Manager. There's no need to create a separate manager group/role.
107260 107440	Inline help	Inline help has been added to new pages in Performance Manager, and updated for those areas receiving interface and functionality updates.

Bug Fixes

Ref#	Page or Area	Description
106221	Impersonation	Integrated clients using an external single sign on identity provider (ADFS) were unable to utilize the Impersonation feature. This has been resolved.