HealthcareSource®
Quality Talent. Quality Care.

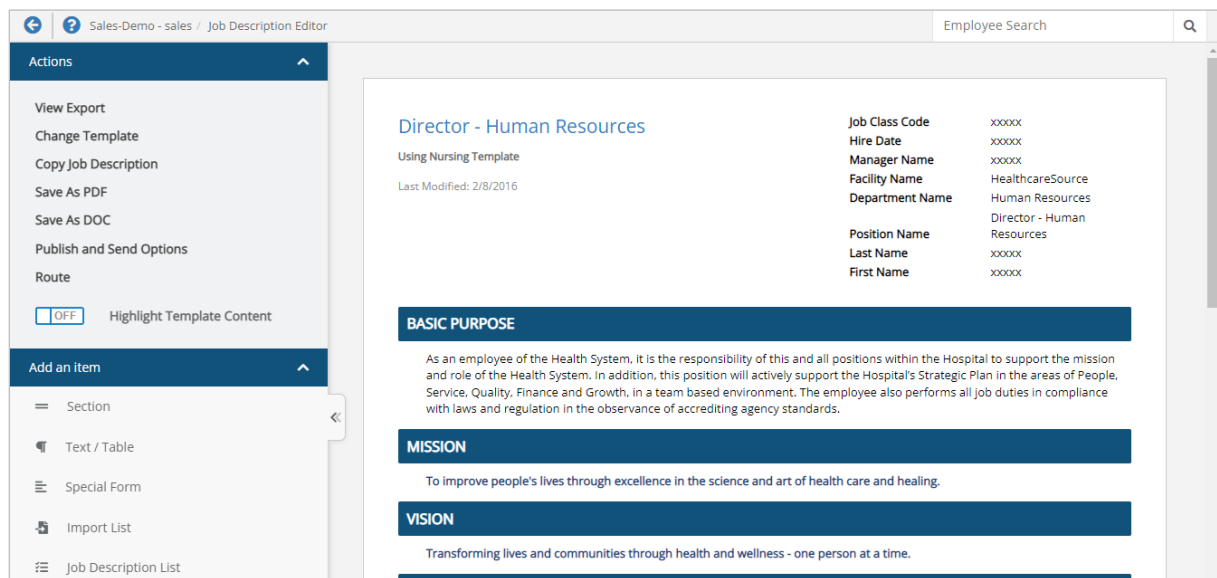# Quick Start Guide – Performance Manager

Job Descriptions

Job descriptions in Performance Manager are created by populating an existing Job Template by entering information and providing the necessary evaluation forms for appraisals. Creating Job Descriptions by starting with a template provides significant time savings when building and editing your forms.

Building a Job Description

Building a job description involves assigning a job description template to a position, adding any desired or necessary special forms, then sending the job description for review and publication. These steps take place from the *Job Descriptions* page under the **Job Description** area.

1. Select the desired job by selecting its row in the Job Descriptions table. The job description detail page opens, with data from the selected template is pre-loaded into the form.
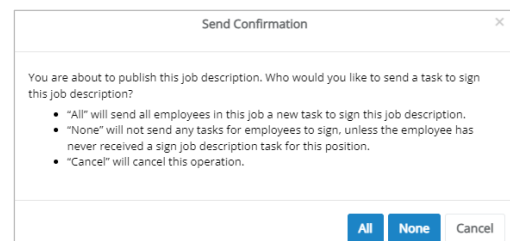

2. Make any necessary edits to the form, such as adding new sections and/or items (For more detail, please refer to **Adding Sections** and **Adding Content to Sections**).

3. When finished, select **Publish and Send Options**. A confirmation pop-up window opens. Click the desired button as instructed in the window.

   Selecting **All** publishes the job description. Signing tasks are generated for all employees who have this job description.

   Selecting **None** also publishes the job description. However, no signing tasks are generated for employees who have this job description (unless the employee never received a *Sign Job Description* task for this job in the past). The **None** option is only available if the **Allow edits without sending to employees** setting is enabled under the **Admin** area.

Adding Sections

Sections help organize your description's details. Job descriptions can contain any number of sections.

The form automatically saves your progress as items are added, so there's no Save button to click along the way.

1. From the **Add an item** panel on the left of the page, click on the **Section** item in the list and drag it over to the main area of the job description template.
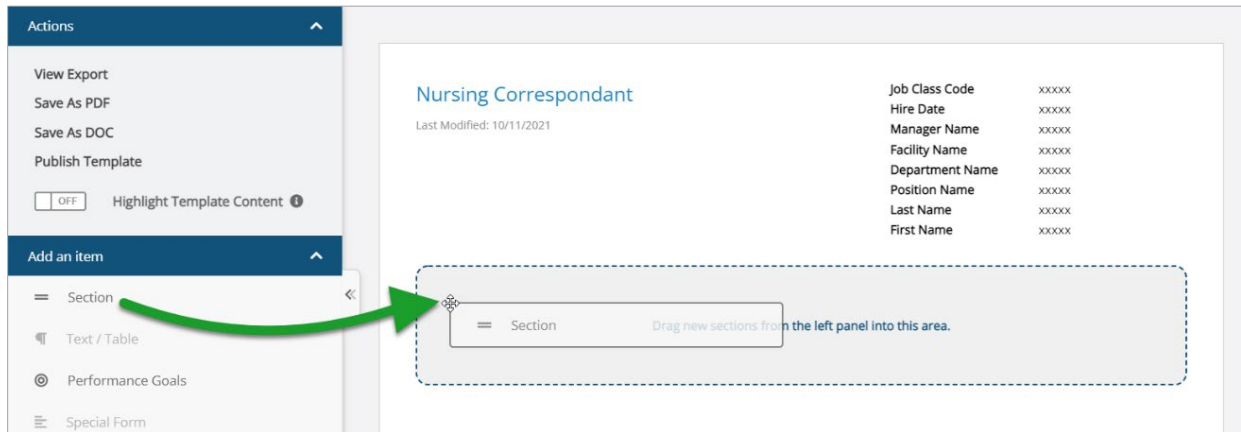
2. Once dropped into the template, the section header displays and allows you to enter a title for the new section. A text editor above the section header provides formatting options for the title (font, text size, color, alignment, etc.).
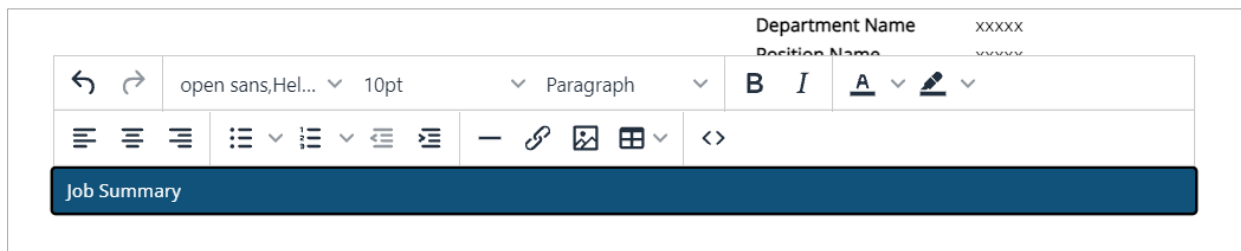

3. Select a section header to reveal appraisal display settings for that section and adjust as needed. These settings determine which appraisals the section should appear (if any).
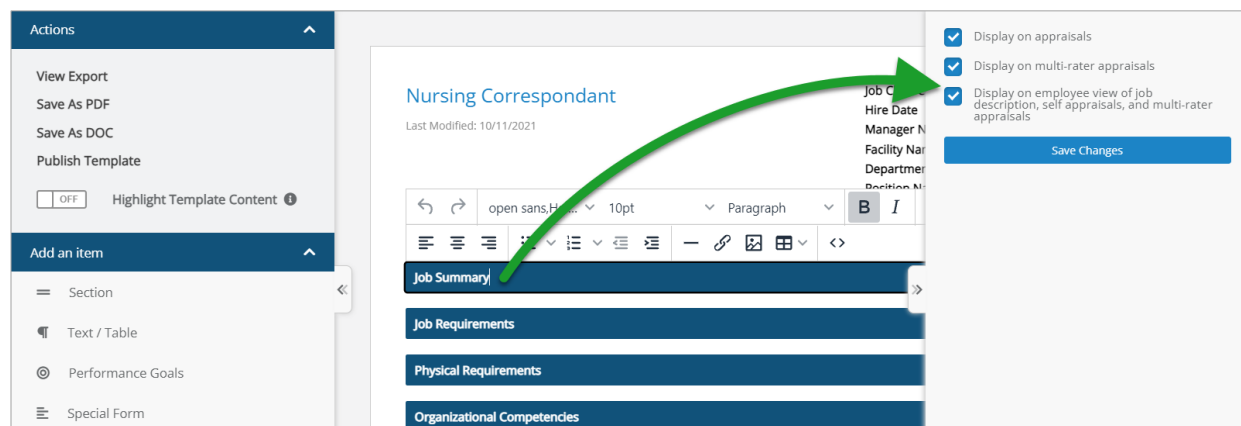
4. Repeat these steps as necessary until all desired sections have been added.

Adding Content to Sections

After all the desired sections have been added, begin adding content to those sections. This is done the same as adding Sections: drag-and-drop the desired content from the **Add an item** pane on the left to under the heading where the content should appear.
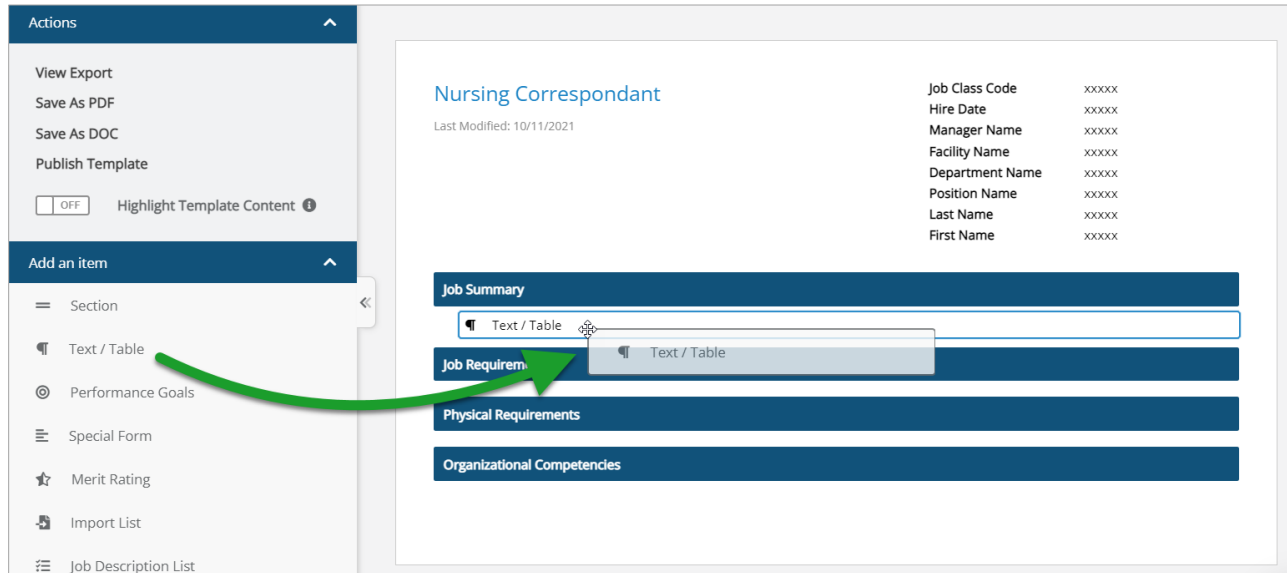
There are various types of items that can be added. Depending on the type of content, additional options are displayed upon adding (e.g. selecting pre-defined content, checking specific items to include, bullet types, appraisal display options). Available content options include:

- **Text/Table**. An open text field that supports basic text entry and the insertion of tables.

- **Performance Goals**. Adds a new section to the template that automatically populates with performance goals pulled from individual employee profiles. Only one Performance Goals section can be added to a job description template.

- **Special Form**. Special forms are generic or universally applicable sections of information. Adding Special Form content to the template opens the **Add Special Form** pop-up window that prompts you to select a pre-defined form.

  Once a form is selected, contents of that form are displayed so you can check specific items to include. The window also prompts you to select bullet types and appraisal display options.

- **Merit Rating**. Similar to Performance Goals, this item adds a new section to the template that automatically populates with merit rating content. Only one Merit Rating section can be added to a job description template.

- **Import List**. This option is used to copy/paste content from external sources such as Word documents. (Details about this process can be found in the **Appendix**.)

- **Job Description List**. Similar to Special Forms, adding a Job Description List item opens a pop-up window with options for selecting pre-defined content, choosing which list items to include, formatting bulleted items, and, when applicable, including an evaluation list for the selected items.

Editing Existing Job Descriptions

Existing job descriptions can be edited at any time. Editing a job description template automatically updates all job descriptions that use that template, even if they are currently published and active.

To begin editing a job description, click the row for the job description to be updated. This displays the existing job description form in edit mode. This allows you to modify existing items in the description and add new sections and content by drag-and-dropping desired items from the panel on the left of the page.

Appendix: Import List

The **Import List** item provides a way to quickly add lists into sections of job templates by copy and pasting content from external sources such as Word documents or other online systems.

When **Import List** is added to a section of your template, an *Import List* pop-up window opens for you to add, format, and configure content. The window outlines each step in the process in different sections to make it easy to add desired content to the template.

1. **Step 1: Format Text**. Type in or copy-and-paste desired content into the text box. Use the available formatting tools at the top of the text field to make any necessary formatting changes.

2. **Step 2: Review & Edit**. Content added to the text box is automatically parsed and displayed here. Deselect (uncheck) any items to remove them from the import process.

3. **Step 3: Evaluation List**. Use the drop-down to select an evaluation list to apply to the selected items.

4. **Step 4: Display Settings**. Select the appraisals you want to use the imported items.