

## 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.

Sales-Demo - sales / Job Description Editor		Emp	oloyee Search	Q
Actions ^				í
View Export Change Template Copy Job Description Save As PDF Save As DOC Publish and Send Options Route	Director - Human Resources Using Nursing Template Last Modified: 2/8/2016	Job Class Code Hire Date Manager Name Facility Name Department Name Position Name Last Name First Name	x0000X x0000X HealthcareSource Human Resources Director - Human Resources x0000X	
OFF Highlight Template Content	BASIC PURPOSE			
Add an item	As an employee of the Health System, it is the responsibil and role of the Health System. In addition, this position w Service, Quality, Finance and Growth, in a team based en with laws and regulation in the observance of accrediting	vill actively support the Hospital's Strategic vironment. The employee also performs a	Plan in the areas of People,	
Text / Table	MISSION			
E Special Form	To improve people's lives through excellence in the scien	ce and art of health care and healing.		
- Import List	VISION			
₩ Job Description List	Transforming lives and communities through health and	wellness - one person at a time.		

- 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.

Actions			
View Export			
Save As PDF	Nursing Correspondant	Job Class Code Hire Date	XXXXX
Save As DOC	Last Modified: 10/11/2021	Manager Name	XXXXX
		Facility Name	XXXXX
Publish Template		Department Name	XXXXXX
OFF Highlight Template Content		Position Name	XXXXXX
OFF Highlight Template Content ()		Last Name	XXXXX
Add an item		First Name	xxxxx
= Section	«		
Text / Table	= Section Dra	ag new sections from the left panel into this area.	
Performance Goals	L		
🖹 Special Form			

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.).

		Department Name XXXXX
ightarrow	open sans,Hel \vee 10pt	✓ Paragraph ✓ B I A ✓ A ✓
≡ ≡		
ob Summa	ry	

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).

Actions ^		Display on appraisals
View Export Save As PDF Save As DOC Publish Template	Nursing Correspondant Job c Last Modified: 10/11/2021 Manage Facility Departm	r N Nar Save Changes Ner
OFF Highlight Template Content	Specific     open sans,Here:     10pt     ∨ Paragraph     >     B     I       I     I     I     I     I     I     I     I	λι-
= Section 《	Job Summary	»
Text / Table	Job Requirements	
Performance Goals	Physical Requirements	
🖹 Special Form	Organizational Competencies	

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.

Actions			
View Export Save As PDF Save As DOC Publish Template	Nursing Correspondant Last Modified: 10/11/2021	Job Class Code Hire Date Manager Name Facility Name Department Name Position Name Last Name First Name	20000X 20000X 20000X 20000X 20000X 20000X
Add an item ^			
= Section 《	Job Summary		
Text / Table	Job Requirem		
Performance Goals	Physical Requirements		
🖹 Special Form			
1 Merit Rating	Organizational Competencies		
- Import List			
🖅 Job Description List			

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.

			Add Special Form	
Cho	ose a special	l form		
G	eneral Activi	ty		~
Star	nd/Walk	Sit		
~	6-8 hours		6–8 hours	
	4-6 hours		4-6 hours	
	2-4 hours	~	2-4 hours	
	1-2 hours		1-2 hours	
	None		None	
	ose a bullet Disc Display on		isals	~
~			rater appraisals	
~	Display on appraisals	emplo	eyee view of job description, self appraisals, and multi-rater	

- 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.

<b>tep 1.</b> Fo			You may	need 1	to adjust for	natting (e.g. bullets, line			view & Edit ms to exclude from the template/Job Description. Use the available drop-
<ul><li>←</li><li>←</li><li>1. Pr</li></ul>	B oven ex cellent	I U xperience knowled	A ~ e as a reg ge of <b>nu</b>	gistere ursing			downs 1. 2. 3. 4.	to sel	Excellent knowledge of <b>nursing care methods and procedures</b> Excellent knowledge of <b>emergency care</b> In-depth knowledge of health and safety guidelines and procedure
1. In pr	-depth <b>ocedu</b>	knowled	ge of <b>he</b> ation, de	ealth a	and safety	guidelines and etc.) and willingness			at all times
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1. In pr to OL » LI » SP <b>tep 3.</b> Ev he selecter <b>asis after</b> i	-depth rocedur follow AN aluatio	knowled <b>res</b> (sanit them at on List - C	ge of <b>he</b> ation, di all times <i>Dptiona</i>	ealth a econta ;	and safety amination e	tc.) and willingness	The sel basis a D	ected <b>fter in</b> isplay	at all times splay Settings d display settings are applied to all items. This can be changed on a per-item mport.

- 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.