iTacit Quick Reference Guide

Performance Management

(This document was last revised in June 2016)

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Introduction

Welcome to Performance Management, powered by iTacit. This guide is designed to walk you through common Set-Up and Maintenance activities in your top left-hand **Menu**.

For more information regarding regular Dashboard Tools and activities, please refer to the *Welcome iCourse for Employees or Managers*, assigned to you in your "My Training" dashboard tool and available in the Training Catalog.

Infrastructure Requirements

To provide a great customer experience, iTacit has some basic technology requirements and recommendations for people using it. We do our best to provide support for popular computers, laptops, tablets, and smartphones, using popular browsers.

If you have any issues with your device or browser, check our recommendations below, or contact your iTacit representative or the helpdesk@itacit.com team.

Internet Browsers

- Microsoft Internet Explorer (IE) 9 (or newer)
- Mozilla Firefox 4 (or newer)
- Safari 5.1 (or newer)
- Google Chrome 10 (and above)

Plug-Ins

- Adobe Acrobat Reader

Media Recommendations

Looking to add context to your performance reviews with supporting documentation? Great! For best results in image quality and playback, please take a look at the guidelines below:

Attachments:

Formats	Microsoft Word, PDF Document Files
iTacit now uses a document viewer to display uploaded documents. Regardless if a user has Microsoft Word on their device, they will be able to view the uploaded document.	
Maximum Size Recommendations (in MB)	
My Messages	10 MB due to mail server processing
iCourse Reference Documents, Employee Documents, Supporting Documents	20MB

Performance Management – Standard Use

To assign and manage Performance Items for staff and managers, begin with your *Performance Questionnaire*. Once attached to the *Performance Item*, the questionnaire can then be scheduled manually through the *Performance Manager* or automatically through the performance item schedule.

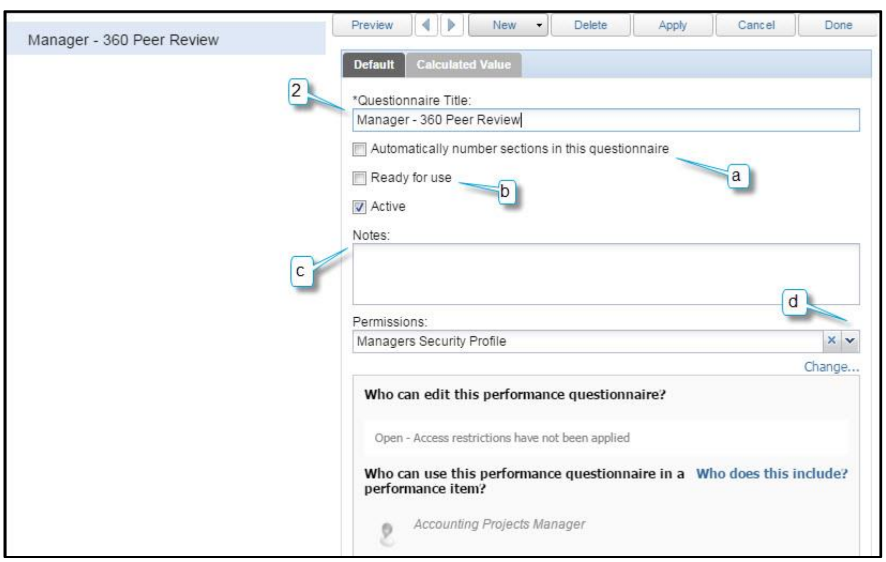
Using *Standard Responses* will simplify the creation of your Performance Questionnaire, if you are scoring based on a scale or common set of answers. You may also wish to create a new or modify an existing *Achievement Levels.* This determine impacts how the overall score is displayed whether staff results are on or below target expectations.

Create a Performance Questionnaire

1. Select **Menu** > **Performance Management** > **Performance Questionnaires**.

2. Select **New**. In the *Default* screen enter the **Questionnaire Title**.

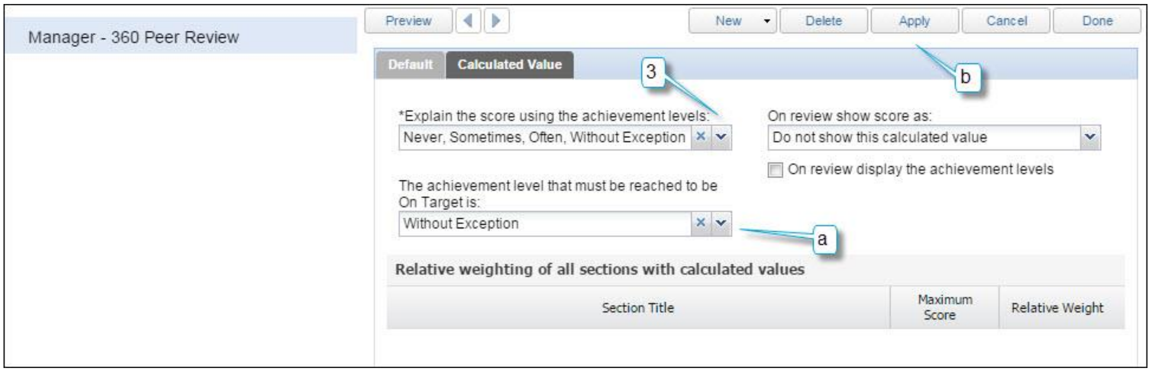
    a. Select **Automatically number sections in this questionnaire** (if applicable).
    b. Select **Ready for use** (once the questionnaire is complete).
    c. Enter **Notes** (such as the creation or version date of the questionnaire).
    d. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
        i. To set permissions without a predetermined permission group select **Change**.
            1. Search for the desired **Group**, **Business Unit**, **Job Classification**, **Role** and/or **Employee**.
            2. Select **Add** to be add your selection to the desired section.
            3. Select **Who does this include?** to view the names of employees included in the desired section.
            4. Select **X**.



If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.

3. In the *Calculated Value* screen select the dropdown arrow by **Explain the score using the achievements levels** to select the Achievement Level scale you wish to measure the questionnaire's performance results.

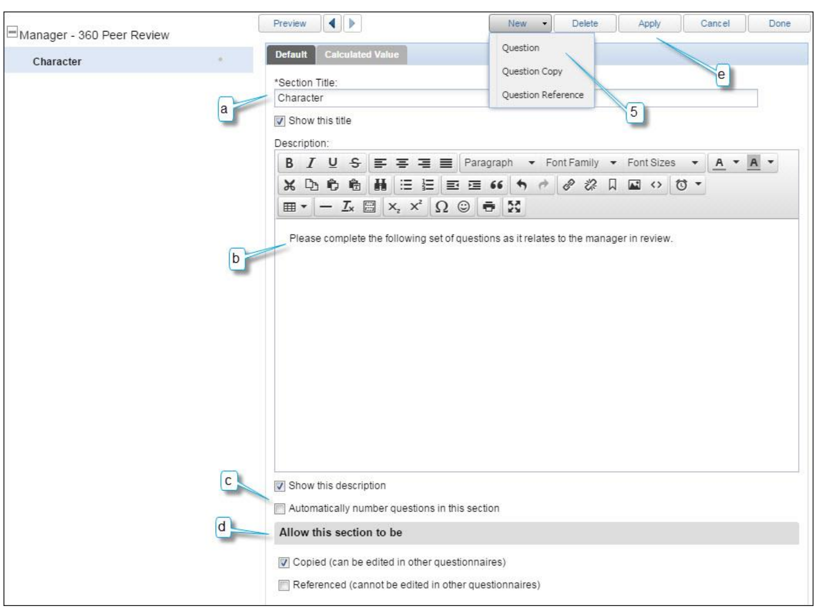
    a. Select **The achievement level that must be reached to be On Target is.**
    b. Select **Apply**.



Sections within the questionnaire may be weighed in the Calculated Value screen to provide a more accurate review of job performance.

4. To continue creating the questionnaire itself, select **New** > **Section**.

    a. Enter the **Section Title**.
    b. Enter a **Description** (if applicable).
    c. Select **Automatically number questions in this section** (if applicable).
    d. Under *Allow this section to be*:
        i. Select **Copied** (to make the section available for copy and modification).
        ii. Select **Referenced** (to make the section available for copy only).
    e. Select **Apply**.



5. With the desired section selected in the table of contents on the left select **New** > **Question**.

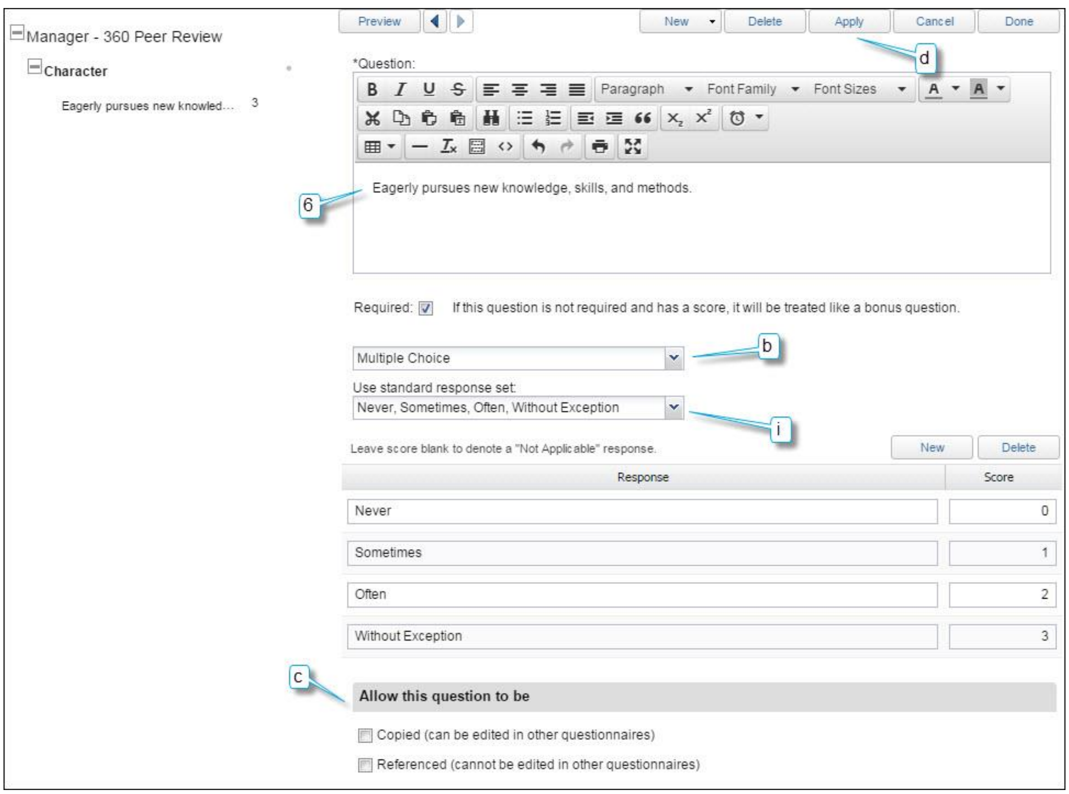
6. Enter the **Question** contents in the textbox.

    a. If the question is not required unselect the **Required** checkbox.
    b. Select the question type.

        i. **Multiple Choice** or **Multiple Select** questions are automatically scored in iTacit. Select **Use Standard response set** or create new responses following these steps:
            1. Select **New**.
            2. Enter **Response**.
            3. Enter **Score** for the selected answer.

    c. Under *Allow this section to be*:
        i. Select **Copied** (to make the question available for copy and modification).
        ii. Select **Referenced** (to make the question available for copy only).

    d. Select **Apply**.



Repeat **steps 4 – 6** to continue creating sections and questions.

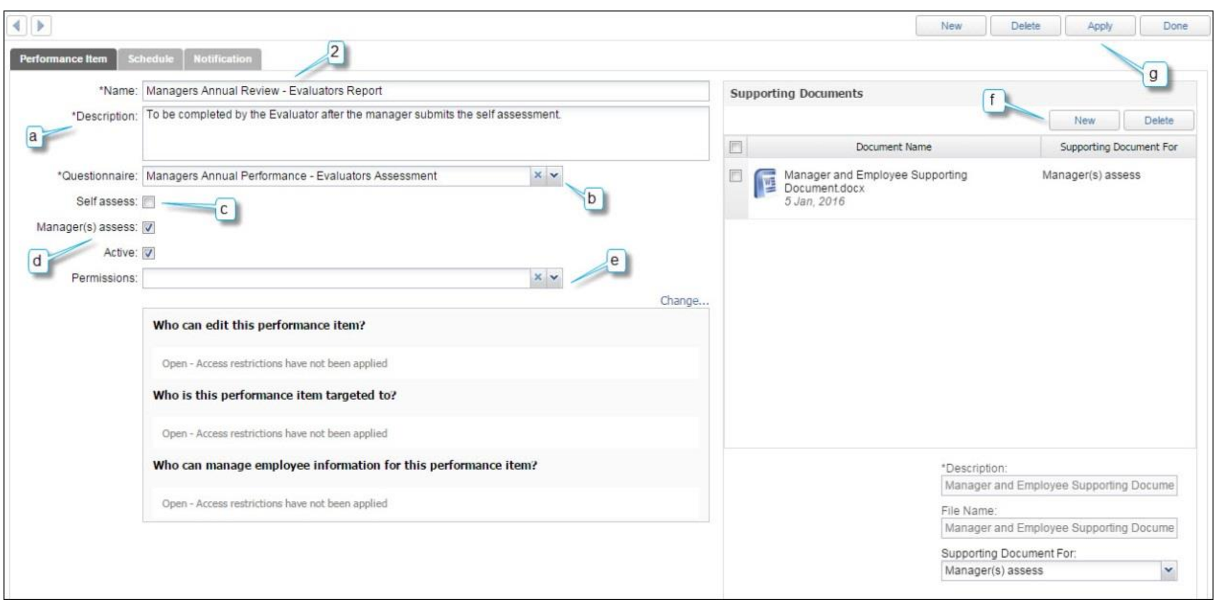
7. Select **Done**.

Create a Performance Item

The Performance Item contains the Performance Questionnaire, as well as any regular schedule settings and notifications for assignment to staff.

1. Select **Menu** > **Performance Management** > **Performance Items**.
2. Select **New**. In the *Performance Item* screen enter the **Name** of the performance item.

    a. Enter the **Description** of the performance item.
    b. Select the **Questionnaire** to associate with the performance item.
    c. Select **Self assess** (for the employee(s) to complete the performance questionnaire).
    d. Select **Manager(s) assess** (for the employee's manager(s) to complete the questionnaire).
    e. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
        i. To set permissions without a predetermined permission group select **Change**.
            1. Search for the desired **Group**, **Business Unit**, **Job Classification**, **Role** and/or **Employee**.
            2. Select **Add** to add your selection to the desired section.
                - "**Who can edit this performance item?"** – will limit the employees who have access to modify the Performance Item itself.
                - "**Who is this performance item targeted to?"** – will dictate the group of employees automatically assigned the Performance Item through the schedule.
                - **"Who can manage employee information for this performance item?" -** will limit visibility of the item and results only to identified groups/ individuals. Without selecting particular individuals/roles, the employee's manager and indirect manager will be able to see Performance results based on your organization's reporting structure.
            3. Select **X**.



    f. In the **Supporting Documents** section select **New** to add a file to the performance item.
    g. Select **Apply**.

3. In the *Schedule* section, select whether the Performance Item will be manually assigned, or automatically assigned to new employees based on their start date:

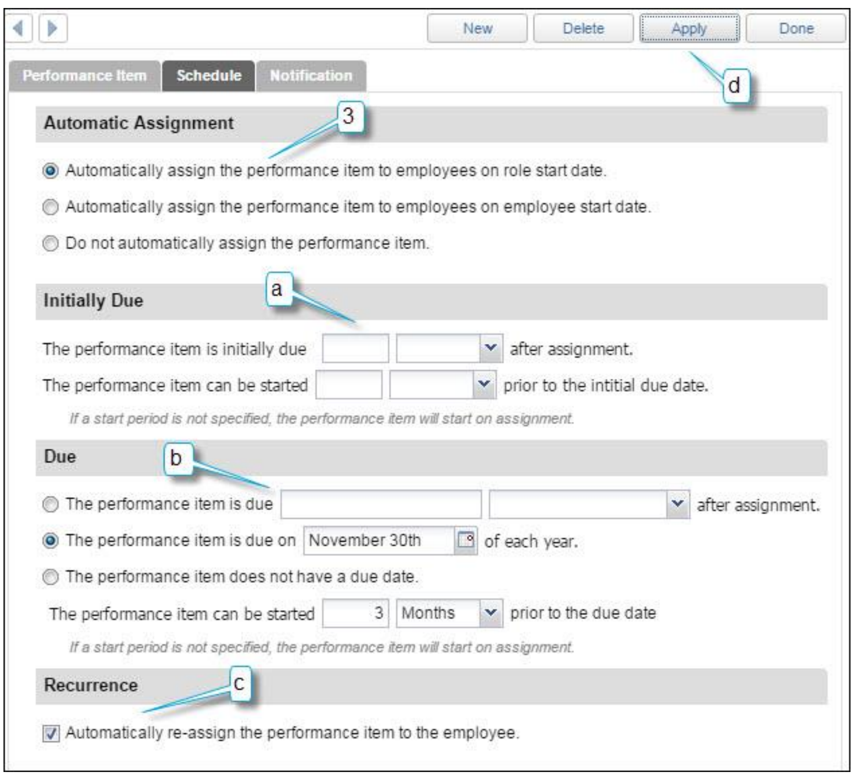
   a. Set the **Initially Due** details (if applicable).

      For example, some organizations conduct an initial 6-month review, before moving to a yearly appraisal.

   b. Set the **Due** criteria for the performance item.
      i. Performance items can be due within a certain timeframe from assignment. This selection is often used when employees are automatically assigned the item based on start date.
      ii. Annual performance reviews can be due on a particular date each year.
      iii. Performance reviews that are manually assigned may not need a due date in this schedule, as it will be set at the time of assignment.

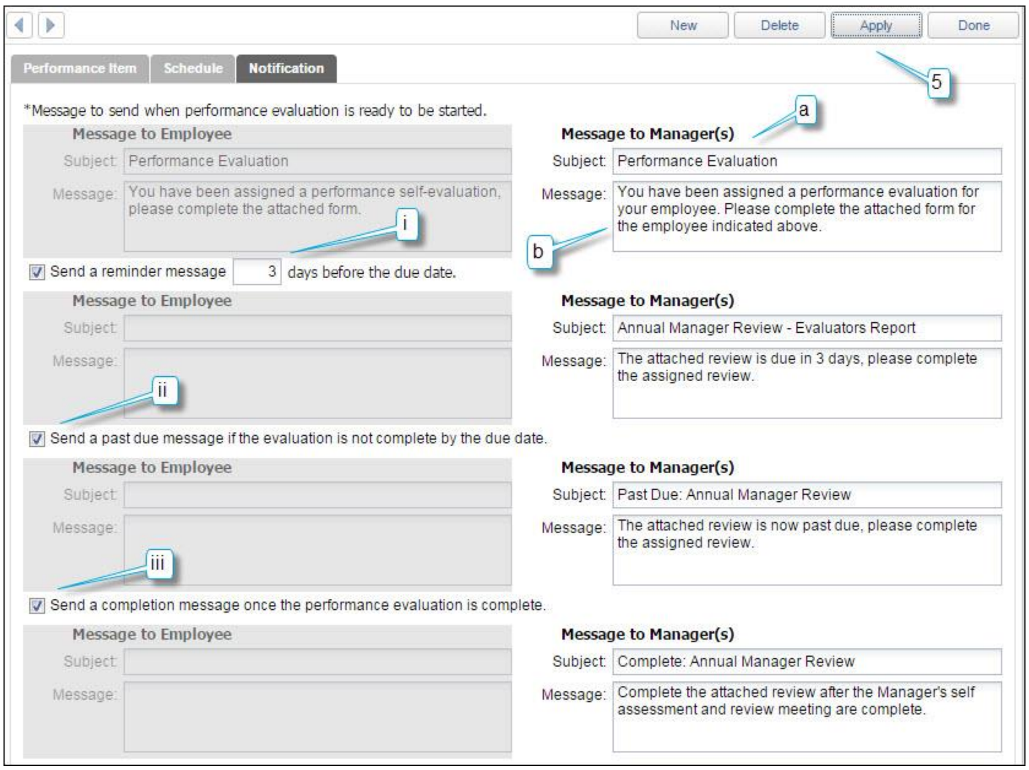
   c. Select **Automatically re-assign the performance item to the employee** if you wish for the performance item to recur.

   d. Select **Apply**.



4. In the *Notification* section, set the **Employee and Manager(s)** email notifications.
    a. Enter the **Subject** of the message.
    b. Enter the context of the **Message**.
        i. In addition to the notification employees will receive when a performance evaluation is ready to be started, these additional messages can also be sent:
            1. Send a reminder # days before the due date
            2. Send a past due message if the evaluation is not complete by the due date
            3. Send a completion message once the performance evaluation is complete

5. Select **Done**.



Schedule a Performance Review

Manually scheduling a Performance Item provides the ability to select specific start and end dates or to schedule the performance based on the pre-set Performance Item schedule.

1. Select **Menu** > **Performance Management** > **Performance Manager**.

2. Select **Schedule**.

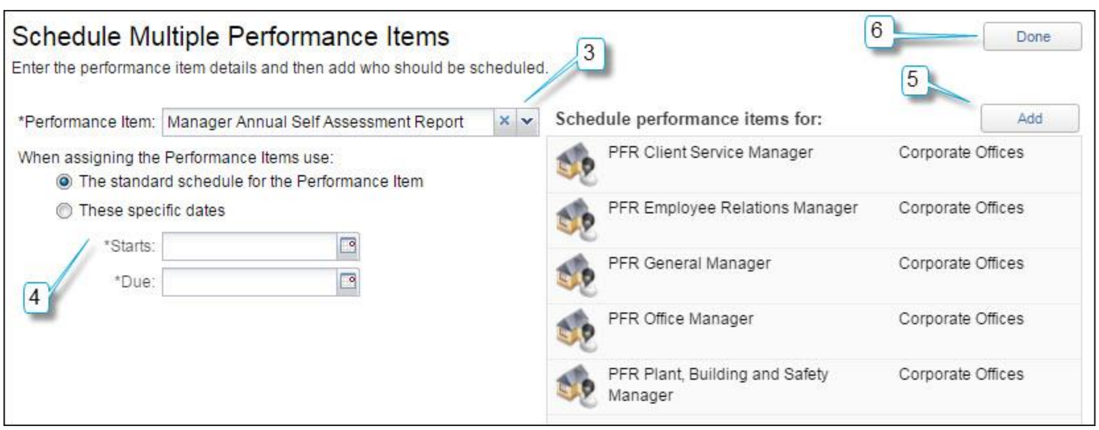
3. Select the desired **Performance Item**.

4. If there is no schedule outlined in the performance item, set the specific **Start** and **Due** dates.

5. In the *Schedule performance items for* section select **Add**.

    a. In the *Search by* section select the desired employees to receive the performance item by **Name**, **Role**, **Job Classification**, **Business Unit** and/or **Group**.
    b. In the *Or Choose* section select the desired employees to receive the performance item by **My Direct Reports** and or **My Direct and Indirect Reports**.
    c. Select **Add**.
        i. Select **Who does this include?** to view the names of employees included in the desired section.
    d. Select **Done**.

6. Select **Done**.



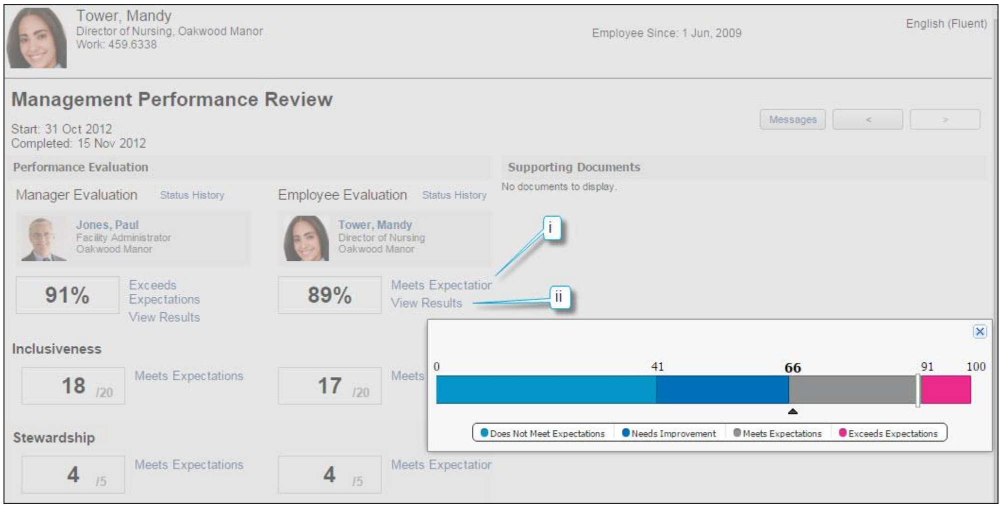
7. A confirmation window will appear confirming the performance item is being scheduled. Select **OK**.

Managing a Performance Reviews

Select **Team Performance** dashboard tool on the *Home* page to manage performance reviews.

View Performance Results

1. At the bottom of the screen select the **List View** tab.
    a. Select the employee performance item to view.
        i. Select the results to display the graphical view.
        ii. Select **View Results** to view the responses for the selected section.
            1. Select **Print Preview** to print the selected section.



Edit Performance Status

2. At the bottom of the screen select the **List View** tab.
    a. Select the employee performance item to edit.
    b. Select **Action** >
        i. **Reassign (Manager)** to pass the questionnaire to an alternate manager, if applicable. Performance items can be passed between managers until it is published (see note below).
        ii. **Place on hold** to place the performance item on hold.
        iii. **Take off hold** to reactivate the performance item (the performance status will revert to previous status).
        iv. **Cancel** to cancel the performance item.

Performance Items that have published, rather than saved are “**Complete**” and can no longer be edited. If there is a need to modify the item, it will need to be deleted and re-assigned.

Deleted Performance Items **cannot** be recovered – they will need to assigned and completed again.

Export Performance Reviews

3. At the bottom of the screen select the **List View** tab.

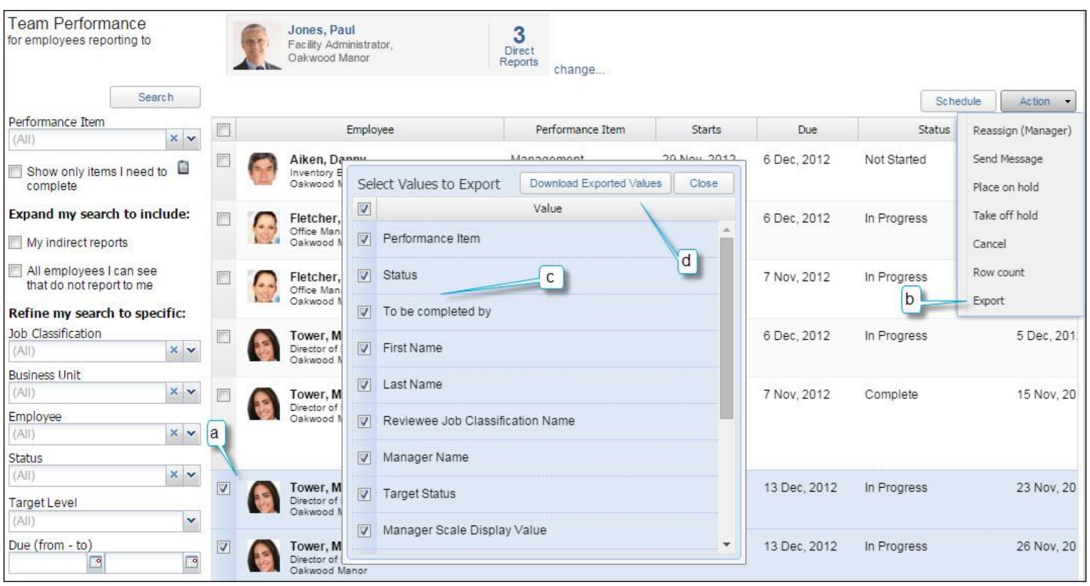
    a. Select the employee performance item to export into Excel.
    b. Select **Action** > **Export**.
    c. Place a checkmark beside the information you want to include from **Select Values to Export** list provided.

Some clients prefer to include all available values in the export, then to sort, manipulate, and delete extra information in Excel afterwards.

You may find it easiest to export the following recommended values:

- Performance Item
- Status
- Manager Name
- Manager Display Value
- Reviewee Display Value
- First and Last Name
- Due
- As of date

    d. Select **Download Exported Values**.
    e. A confirmation window will display. Select **Yes**.



Performance Management – Configuration

Creating and modifying *Achievement Levels*, *Standard Responses*, and *Performance Questionnaire* and *Performance Item Permission Groups* will allow you to standardize across performance reviews for multiple reviews, employee groups, or evaluation years.

Create Achievement Levels

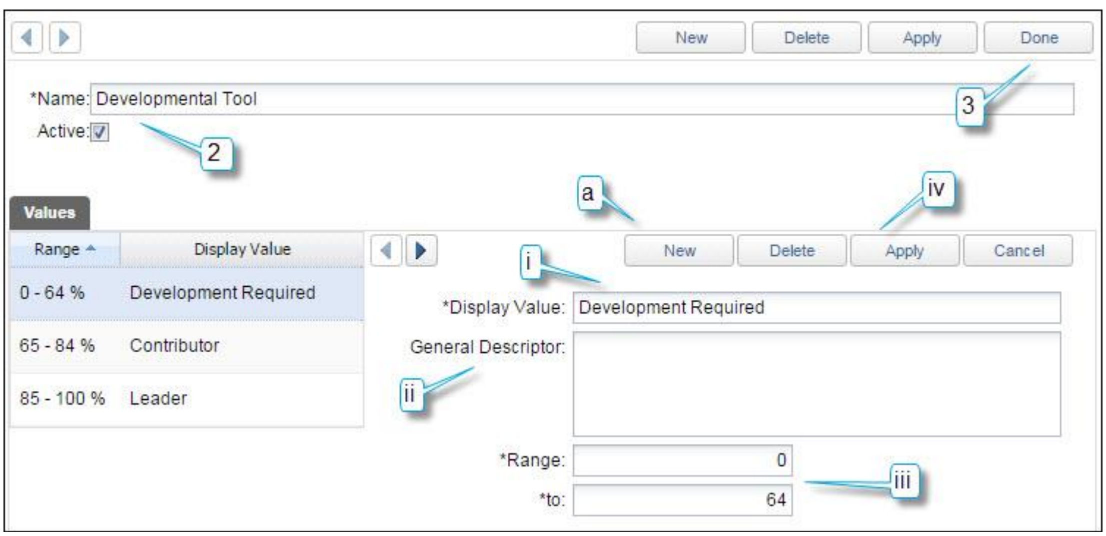
Achievement Levels are used to explain the scoring for Performance Questionnaires. This scale will be used to determine whether the employee is On Target, when viewing all employee results in the Team Performance tool.

1. Select **Menu** > **Performance Management** > **Achievement Levels**.

2. Select **New**. Enter the **Name** of the set of achievement levels.

    a. In the *Values* section select **New**.
        i. Enter the **Display Value** option.
        ii. Enter **General Descriptor** (if applicable).
        iii. Enter the **Range** and **to** for the selected achievement level.
        iv. Select **Apply**.
    b. Repeat **steps above** to continue creating the response set.

3. Select **Done**.



Create a Set of Standard Responses

Standard Responses are used as Multiple Choice or Multiple Select answers in Performance Questions, maintaining consistency in scoring.

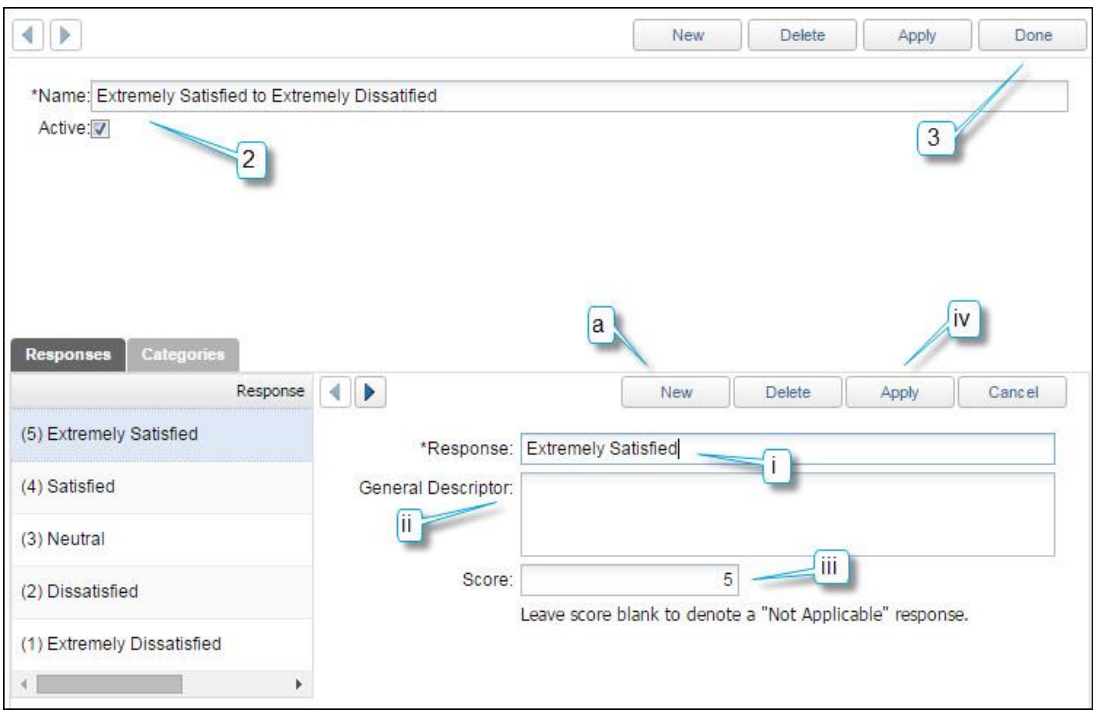
1. Select **Menu** > **Performance Management** > **Standard Responses**.

2. Select **New**. Enter the **Name** of the set of standard responses.

    a. In the *Responses* section select **New**.
        i. Enter the **Response** option.
        ii. Enter **General Descriptor** (if applicable).
        iii. Enter the **Score** for the selected response.
        iv. Select **Apply**.

    b. Repeat **above steps** to continue creating the response set.

3. Select **Done**.



Create Performance Questionnaire Permissions

Permission Groups can be set up to help in the set-up of multiple Performance Questionnaires involving the same individuals in the Edit and Who Can Use groups.

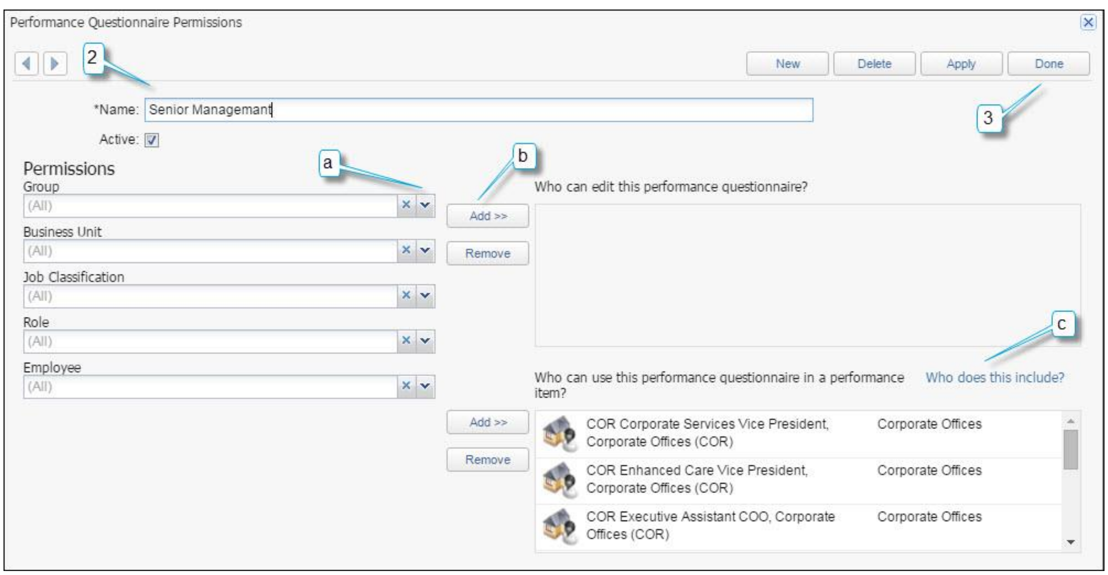
1. Select **Menu** > **Performance Management** > **Performance Questionnaire Permissions**.

2. Select **New**. Enter the **Name** of the permission group.

    a. Search for the desired **Group**, **Business Unit**, **Job Classification**, **Role** and/or **Employee**.
    b. Select **Add** to be add your selection to the desired section.
    c. Select **Who does this include?** to view the names of employees included in the desired section.

3. Select **Done**.

If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.



Create Performance Item Permissions

Permission Groups can be set up to help in the set-up of multiple Performance Items involving the same individuals in the Edit, Target, and Review groups.

1. Select **Menu** > **Performance Management** > **Performance Item Permissions**.

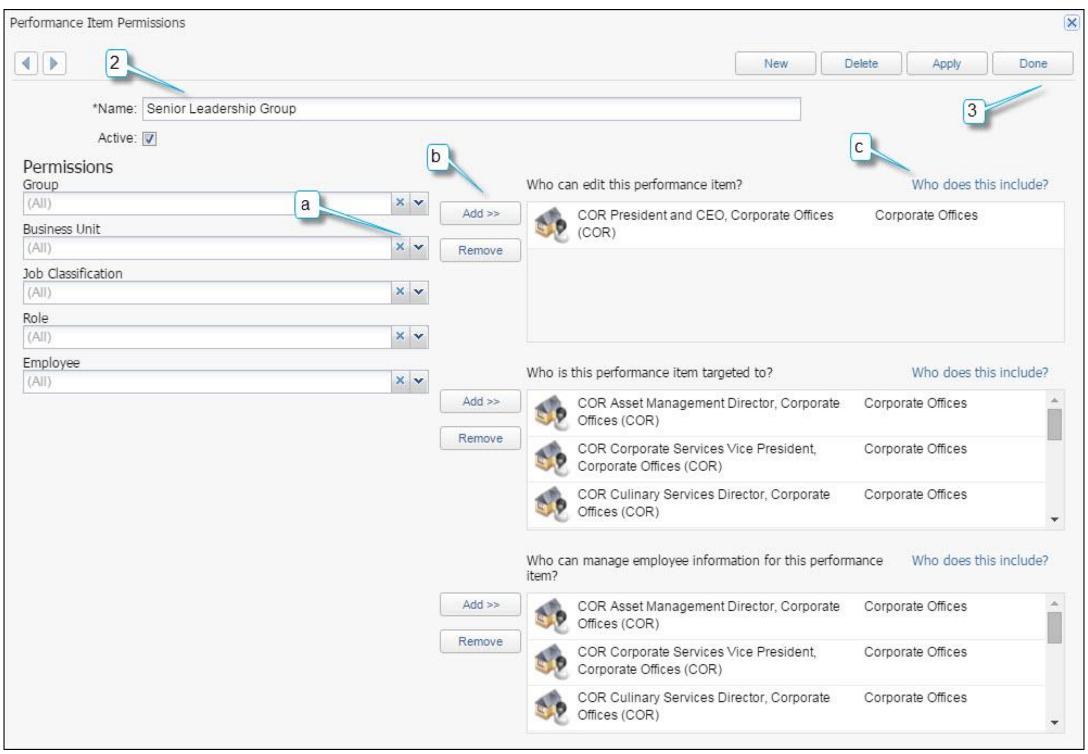
2. Select **New**. Enter the **Name** of the permission group.

    a. Search for the desired **Group**, **Business Unit**, **Job Classification**, **Role** and/or **Employee**.
    b. Select **Add** to be add your selection to the desired section.
    c. Select **Who does this include?** to view the names of employees included in the desired section.

    Adding employees to the **"Who can manage employee information for this performance item?"** group will limit visibility of the performance item and results only to these individuals. For a Performance Item some organizations choose to restrict access to the Administrator/CEO and HR group alone. Without selecting particular individuals/roles, the employee's manager and indirect manager will be able to see Performance results based on your organization's reporting structure.

3. Select **Done**.

If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.



The Media Library

All audio, video, and image files for your Performance Items are stored in the Media Library, so they may be shared and used in multiple documents.

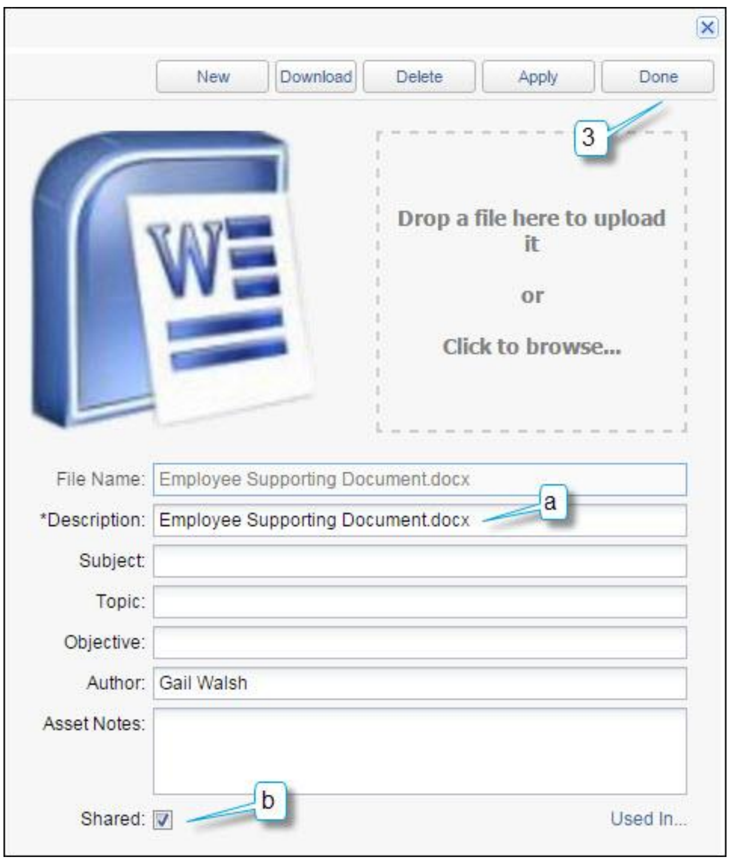
1. Select **Menu** > **Performance Management** > **Media Library**.

Create a new media library item:

2. In the *Media Browser* screen:

    a. Enter a **Description** for the item.
    b. Place a checkmark in the box by **Shared** to ensure your media item is available for use by others.
    c. Select **Browse** to search for the media file you would like to upload.

3. Select **Done**.



View an existing media library item:

4. In the *Media Browser* screen:

a. Enter **Keywords** to search for the desired media library item.
b. Select **Search**.
c. Select the item to display its details on the right side of the screen.
d. Select textbox of the area you would like to edit
   i. Select **Download** to download a copy of the file to your computer.
   ii. Select **Delete** to remove the file form the Media Library.
e. Select **Used In** to view the list of performance reviews that are utilizing the selected media file.

5. Select **Done**.