



iTacit Quick Reference Guide

Performance Management

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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**.

Manager - 360 Peer Review

Preview [Navigation Icons] New Delete Apply Cancel Done

Default **Calculated Value**

*Explain the score using the achievement levels: Never, Sometimes, Often, Without Exception [x] [v]

On review show score as: Do not show this calculated value [v]

The achievement level that must be reached to be On Target is: Without Exception [x] [v]

On review display the achievement levels ☐

Relative weighting of all sections with calculated values

Section Title	Maximum Score	Relative Weight
---------------	---------------	-----------------



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**.

Manager - 360 Peer Review

Character

Preview [Navigation Icons] New Delete Apply Cancel Done

Default **Calculated Value**

*Section Title: Character

☒ Show this title

Description: Please complete the following set of questions as it relates to the manager in review.

☒ Show this description

☐ Automatically number questions in this section

Allow this section to be

☒ Copied (can be edited in other questionnaires)

☐ Referenced (cannot be edited in other questionnaires)

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**.

Manager - 360 Peer Review

Character

Eagerly pursues new knowled... 3

*Question:

Eagerly pursues new knowledge, skills, and methods.

Required: ☒ If this question is not required and has a score, it will be treated like a bonus question.

Multiple Choice

Use standard response set:

Never, Sometimes, Often, Without Exception

Leave score blank to denote a "Not Applicable" response.

Response	Score
Never	0
Sometimes	1
Often	2
Without Exception	3

Allow this question to be

☐ Copied (can be edited in other questionnaires)

☐ Referenced (cannot be edited in other questionnaires)



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**.

The screenshot shows the 'Performance Item' creation interface. It has tabs for 'Performance Item', 'Schedule', and 'Notification'. The 'Performance Item' tab is active. The form includes fields for Name, Description, Questionnaire, Self assess, Manager(s) assess, Active, and Permissions. Below these are three sections for permissions: 'Who can edit this performance item?', 'Who is this performance item targeted to?', and 'Who can manage employee information for this performance item?'. To the right is the 'Supporting Documents' section with a table of documents and a 'New' button. At the bottom right, there are fields for Description, File Name, and Supporting Document For. Callouts a through g point to specific elements: a points to the Description field, b points to the Questionnaire dropdown, c points to the Self assess checkbox, d points to the Manager(s) assess checkbox, e points to the Permissions dropdown, f points to the New button in the Supporting Documents section, and g points to the Apply button at the top right.

Document Name	Supporting Document For
Manager and Employee Supporting Document.docx 3 Jan, 2016	Manager(s) assess

- 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:
- Set the **Initially Due** details (if applicable).
For example, some organizations conduct an initial 6-month review, before moving to a yearly appraisal.
 - Set the **Due** criteria for the performance item.
 - 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.
 - Annual performance reviews can be due on a particular date each year.
 - 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.
 - Select **Automatically re-assign the performance item to the employee** if you wish for the performance item to recur.
 - Select **Apply**.

The screenshot shows a web interface for scheduling performance items. At the top, there are buttons for 'New', 'Delete', 'Apply', and 'Done'. Below these are three tabs: 'Performance Item', 'Schedule', and 'Notification'. The 'Schedule' tab is selected. The main content area is divided into four sections: 'Automatic Assignment', 'Initially Due', 'Due', and 'Recurrence'. Each section has specific configuration options. Callouts 'a', 'b', 'c', and 'd' are used to highlight key areas: 'a' points to the 'Initially Due' section, 'b' points to the 'Due' section, 'c' points to the 'Recurrence' section, and 'd' points to the 'Apply' button.

Automatic Assignment (Callout 3)

- ☒ Automatically assign the performance item to employees on role start date.
- ☐ Automatically assign the performance item to employees on employee start date.
- ☐ Do not automatically assign the performance item.

Initially Due (Callout a)

The performance item is initially due [] [] after assignment.

The performance item can be started [] [] prior to the initial due date.

If a start period is not specified, the performance item will start on assignment.

Due (Callout b)

- ☐ The performance item is due [] [] after assignment.
- ☒ The performance item is due on November 30th of each year.
- ☐ The performance item does not have a due date.

The performance item can be started 3 Months prior to the due date

If a start period is not specified, the performance item will start on assignment.

Recurrence (Callout c)

- ☒ Automatically re-assign the performance item to the employee.

(Callout d points to the 'Apply' button)

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**.

Performance Item Schedule Notification

*Message to send when performance evaluation is ready to be started.

Message to Employee

Subject: Performance Evaluation

Message: You have been assigned a performance self-evaluation, please complete the attached form.

☒ Send a reminder message 3 days before the due date.

Message to Employee

Subject:

Message:

☒ Send a past due message if the evaluation is not complete by the due date.

Message to Employee

Subject:

Message:

☒ Send a completion message once the performance evaluation is complete.

Message to Employee

Subject:

Message:

Message to Manager(s)

Subject: Performance Evaluation

Message: You have been assigned a performance evaluation for your employee. Please complete the attached form for the employee indicated above.

Message to Manager(s)

Subject: Annual Manager Review - Evaluators Report

Message: The attached review is due in 3 days, please complete the assigned review.

Message to Manager(s)

Subject: Past Due: Annual Manager Review

Message: The attached review is now past due, please complete the assigned review.

Message to Manager(s)

Subject: Complete: Annual Manager Review

Message: Complete the attached review after the Manager's self assessment and review meeting are complete.

New Delete Apply 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**.

The screenshot shows the 'Schedule Multiple Performance Items' form. It includes a dropdown for 'Performance Item' (set to 'Manager Annual Self Assessment Report'), radio buttons for scheduling (selected: 'The standard schedule for the Performance Item'), and date fields for '*Starts:' and '*Due:'. A table lists employees with their roles and business units. Callouts 3 through 6 point to the 'Performance Item' dropdown, the 'Add' button, the 'Add' button, and the 'Done' button respectively.

Schedule performance items for:	
PFR Client Service Manager	Corporate Offices
PFR Employee Relations Manager	Corporate Offices
PFR General Manager	Corporate Offices
PFR Office Manager	Corporate Offices
PFR Plant, Building and Safety Manager	Corporate Offices

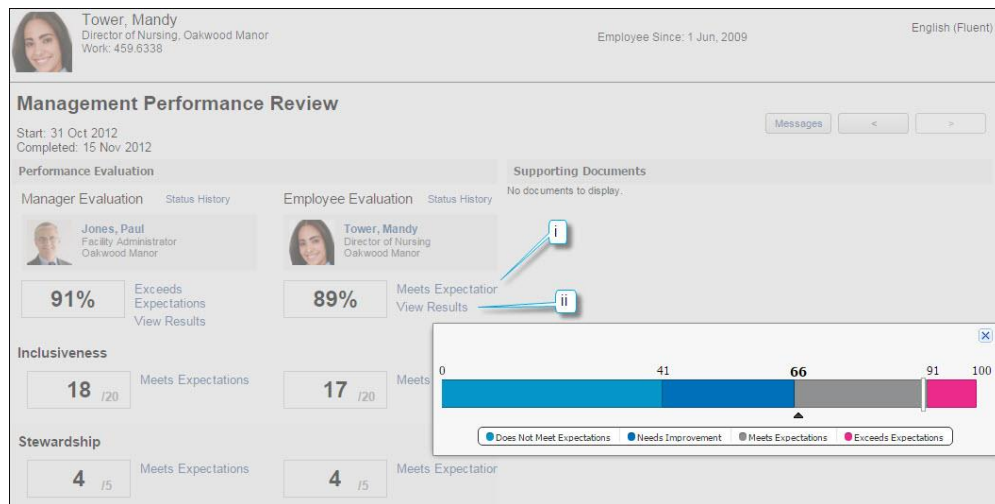
7. A confirmation window will appear confirming the performance item is being scheduled. Select **OK**.

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.

The screenshot shows the 'Team Performance' interface for employees reporting to Paul Jones, Facility Administrator at Oakwood Manor. The interface includes a search bar, a list of performance items, and a table of performance items. A callout box labeled 'a' points to the 'Show only items I need to complete' checkbox, and a callout box labeled 'b' points to the 'Action' dropdown menu.

Employee	Performance Item	Starts	Due	Status
Aiken, Danny Inventory Expeditor, Oakwood Manor	Management Review	29 Nov, 2012	6 Dec, 2012	Not Started
Fletcher, Shelley Office Manager, Oakwood Manor	Management Performance Review	29 Nov, 2012	6 Dec, 2012	In Progress
Fletcher, Shelley Office Manager, Oakwood Manor	Management Performance Review	31 Oct, 2012	7 Nov, 2012	In Progress
Tower, Mandy Director of Nursing, Oakwood Manor	Management Performance Review	29 Nov, 2012	6 Dec, 2012	In Progress



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 be assigned and completed again.

Export Performance Reviews

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

- Select the employee performance item to export into Excel.
- Select **Action > Export**.
- 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

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

The screenshot shows the 'Team Performance' interface for employees reporting to Jones, Paul (Facility Administrator, Oakwood Manor). The interface includes a search bar, filters, and a table of performance items. A 'Select Values to Export' dialog box is open, allowing users to select fields to export. The 'Download Exported Values' button is highlighted with a blue arrow labeled 'd'. The 'Export' button in the 'Action' menu is highlighted with a blue arrow labeled 'b'. The 'Status' field in the list is highlighted with a blue arrow labeled 'c'. The 'Performance Item' field in the list is highlighted with a blue arrow labeled 'a'.

Employee	Performance Item	Starts	Due	Status	Reassign (Manager)
Aiken, Dennis	Inventory Management	20 Nov, 2012	6 Dec, 2012	Not Started	Send Message
Fletcher, Office Man			6 Dec, 2012	In Progress	Place on hold
Fletcher, Office Man			7 Nov, 2012	In Progress	Take off hold
Tower, M			6 Dec, 2012	In Progress	Cancel
Tower, M			7 Nov, 2012	Complete	Row count
Tower, M			13 Dec, 2012	In Progress	Export
Tower, M			13 Dec, 2012	In Progress	

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**.

The screenshot shows the 'Achievement Levels' configuration window. At the top, there are buttons for 'New', 'Delete', 'Apply', and 'Done'. The main form has a '*Name:' field containing 'Developmental Tool' (callout 3) and an 'Active:' checkbox (callout 2). Below this is a 'Values' section with a table:

Range	Display Value
0 - 64 %	Development Required
65 - 84 %	Contributor
85 - 100 %	Leader

To the right of the table is a sub-form for editing a value (callout a). It has buttons for 'New', 'Delete', 'Apply', and 'Cancel'. The sub-form fields are: '*Display Value:' (callout i) with 'Development Required', 'General Descriptor:' (callout ii) with an empty text box, '*Range:' (callout iii) with '0', and '*to:' with '64'. Callout iv points to the 'Apply' button in the sub-form.

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**.

The screenshot shows the 'Standard Responses' interface. At the top, there are buttons for 'New', 'Delete', 'Apply', and 'Done'. Below these, the '*Name:' field contains 'Extremely Satisfied to Extremely Dissatisfied', with a callout '3' pointing to it. The 'Active:' checkbox is checked, with a callout '2' pointing to it. Below the name field, there are two tabs: 'Responses' and 'Categories'. The 'Responses' tab is active, showing a list of responses: (5) Extremely Satisfied, (4) Satisfied, (3) Neutral, (2) Dissatisfied, and (1) Extremely Dissatisfied. To the right of this list, there are buttons for 'New', 'Delete', 'Apply', and 'Cancel'. Below the list, the '*Response:' field contains 'Extremely Satisfied', with a callout 'i' pointing to it. The 'General Descriptor:' field is empty, with a callout 'ii' pointing to it. The 'Score:' field contains the number '5', with a callout 'iii' pointing to it. Below the score field, there is a note: 'Leave score blank to denote a "Not Applicable" response.' There are also callouts 'a' and 'iv' pointing to the 'New' and 'Apply' buttons respectively.

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**.

Performance Questionnaire Permissions

New Delete Apply Done

*Name: Senior Management

Active: ☒

Permissions

Group (All) x v

Business Unit (All) x v

Job Classification (All) x v

Role (All) x v

Employee (All) x v

Add >> Remove

Who can edit this performance questionnaire?

Who can use this performance questionnaire in a performance item?

Who does this include?

COR Corporate Services Vice President, Corporate Offices (COR)	Corporate Offices
COR Enhanced Care Vice President, Corporate Offices (COR)	Corporate Offices
COR Executive Assistant COO, Corporate Offices (COR)	Corporate Offices

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**.

The screenshot shows the 'Media Browser' window. At the top, there are buttons: 'New', 'Download', 'Delete', 'Apply', and 'Done'. On the left is a large blue icon with the letters 'WE'. On the right is a dashed box containing the text 'Drop a file here to upload it or Click to browse...'. Below this is a form with the following fields: 'File Name:' (containing 'Employee Supporting Document.docx'), '*Description:' (containing 'Employee Supporting Document.docx'), 'Subject:', 'Topic:', 'Objective:', 'Author:' (containing 'Gail Walsh'), and 'Asset Notes:'. At the bottom left is a 'Shared:' checkbox which is checked. At the bottom right is a 'Used In...' link. Three callouts are present: '3' points to the dashed upload box, 'a' points to the '*Description:' field, and 'b' points to the 'Shared:' checkbox.

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 from the Media Library.
- e. Select **Used In** to view the list of performance reviews that are utilizing the selected media file.

5. Select **Done**.

