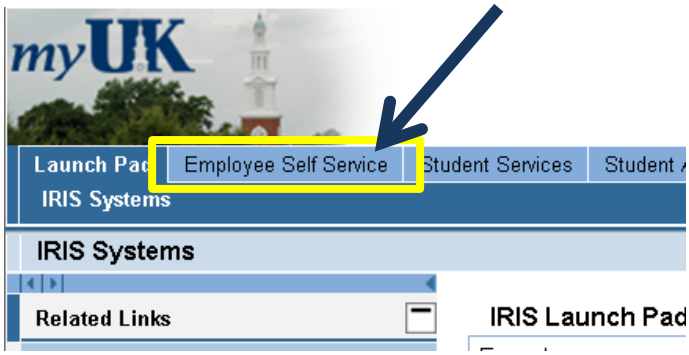
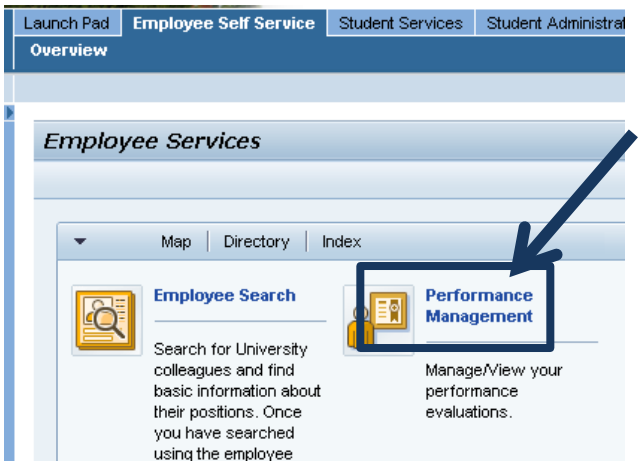
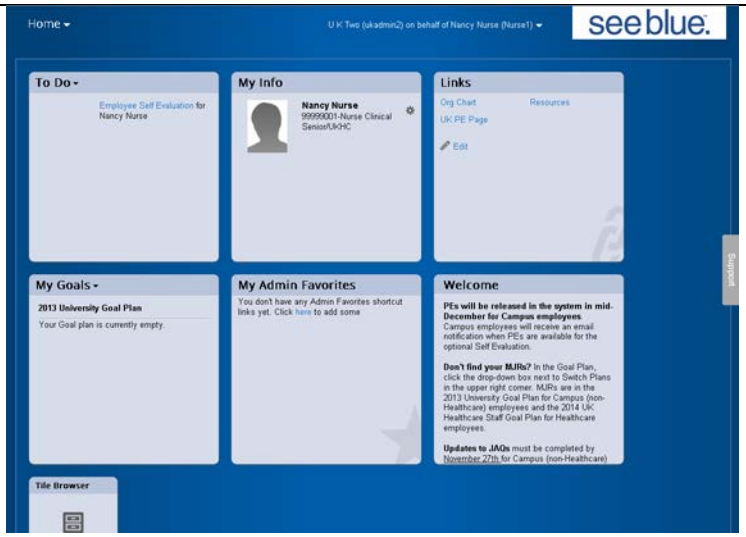
UK Online PE System – Managing the PE Process for Supervisors – Bedside Nurses and Nurse Care Techs

PE forms are not available year-round. PE forms are generated and released one to two months before the PE due date. For UK HealthCare employees, the release date is in May.

Access the UK Online PE System via myUK

Step	Action	
1	From myUK, click on the **Employee Self Service** Tab	
2	Click on the **Performance Management** link	
3	Click on the **Performance Goals and Evaluations** link This link takes you to the UK Online PE System.	

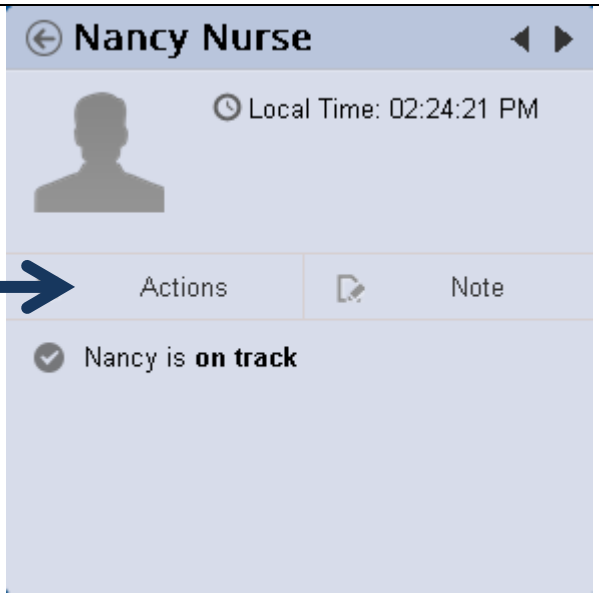
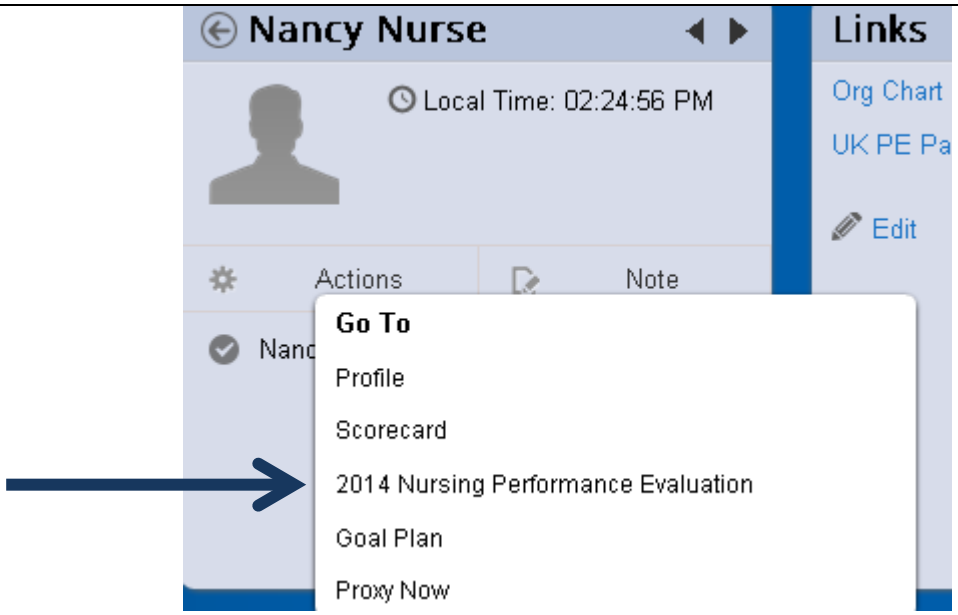
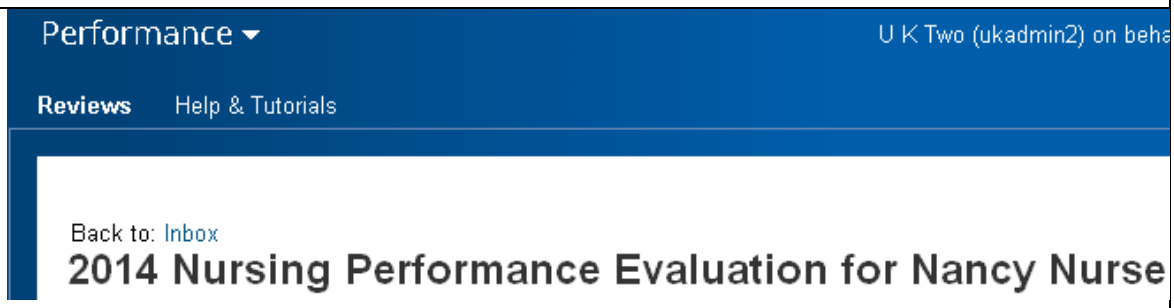
You should now see your Home page in the UK Online PE System.	

Basic Navigation – Accessing Employee Performance Evaluation Forms

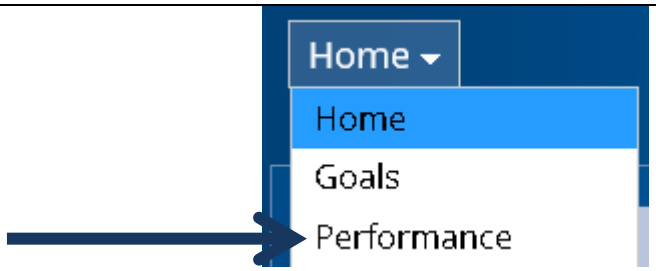
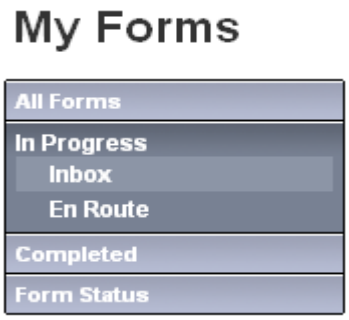
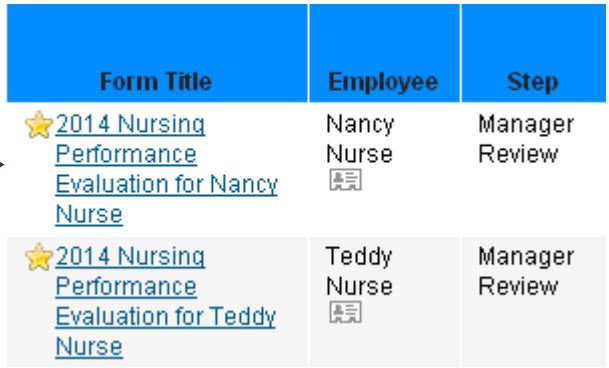
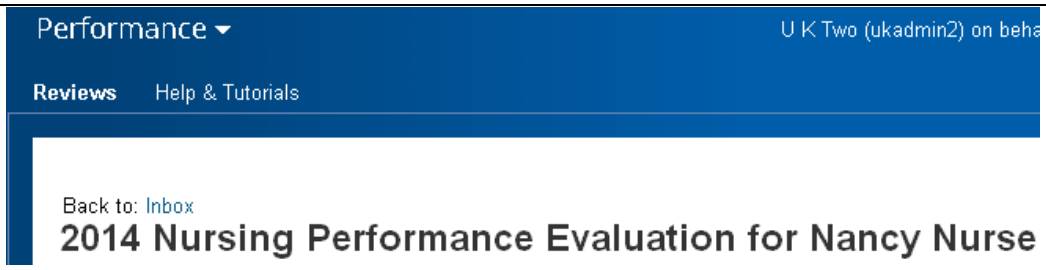
From your Home screen, you have two options when accessing your employees' PE forms.

Option One: • Locate the **My Team** tile • Click on the employee record you wish to view	

Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

• Click on the **Actions** link	
• Click on the **Performance Evaluation** link	
• You are taken directly to the employee's PE form, if it has been released	

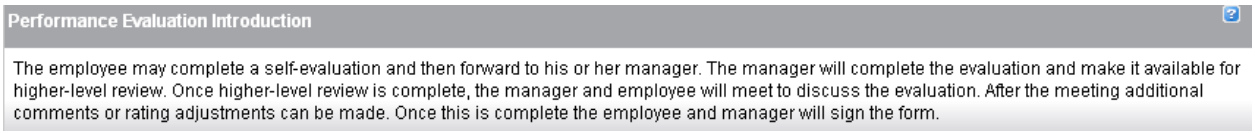
Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

Option Two: • From the **Home Page**, click on the **Navigation Menu** and choose **Performance**	
• There are four main sections in the **My Forms** menu	**All Forms:** contains all forms, currently active or completed **Completed:** contains all completed forms **Form Status:** view form status  **In Progress:** *Inbox* - contains active forms requiring your attention *En Route* – contains active forms "currently with" another person in the PE process, this is normally the employee
• From any of the sections, Click on the PE link you would like to view in the **Form Title** column	
• You are taken to the employee's PE form	
• To return to the PE form listing, click on the **Reviews** link	

Completing the PE Process – Progress Line and Introduction

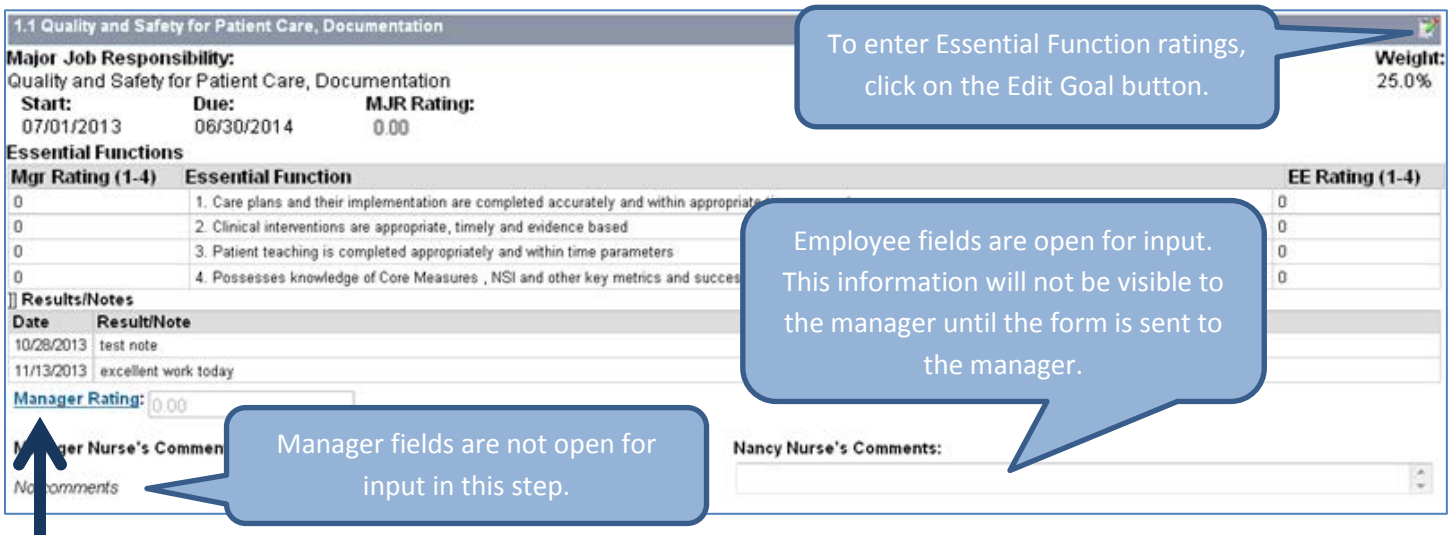
After accessing the PE form both the employee and supervisor can view the progress line. This gives you a quick update of which step the PE form is currently in.

There is also an introduction that explains the process from beginning to end.



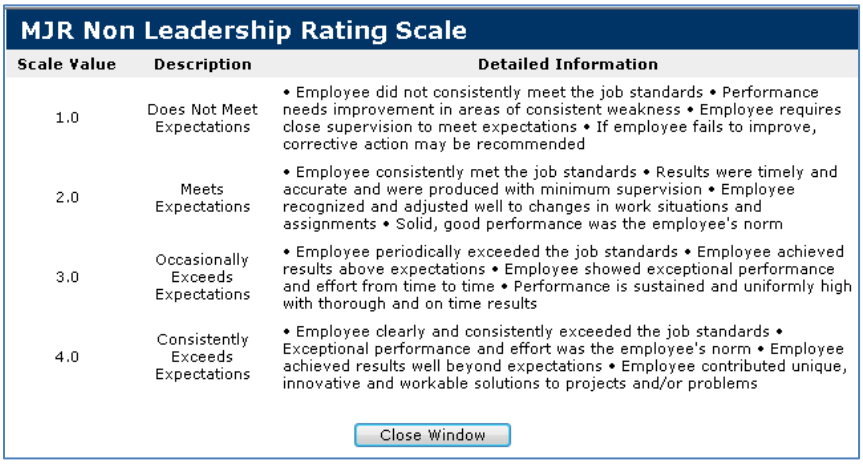
Completing the PE Process - Step One: Employee Self Evaluation

The PE form in the UK Online PE System starts with an Employee Self Evaluation. Each Major Job Responsibility has its own section where employees self-rate each Essential Function and enter comments to support their ratings.



To review what the rating levels mean, click on the **Manager Rating** link. The window to the right will open, in which detailed information will be presented for each rating.

Reminder: Only whole numbers are permitted for Essential Function rating levels.



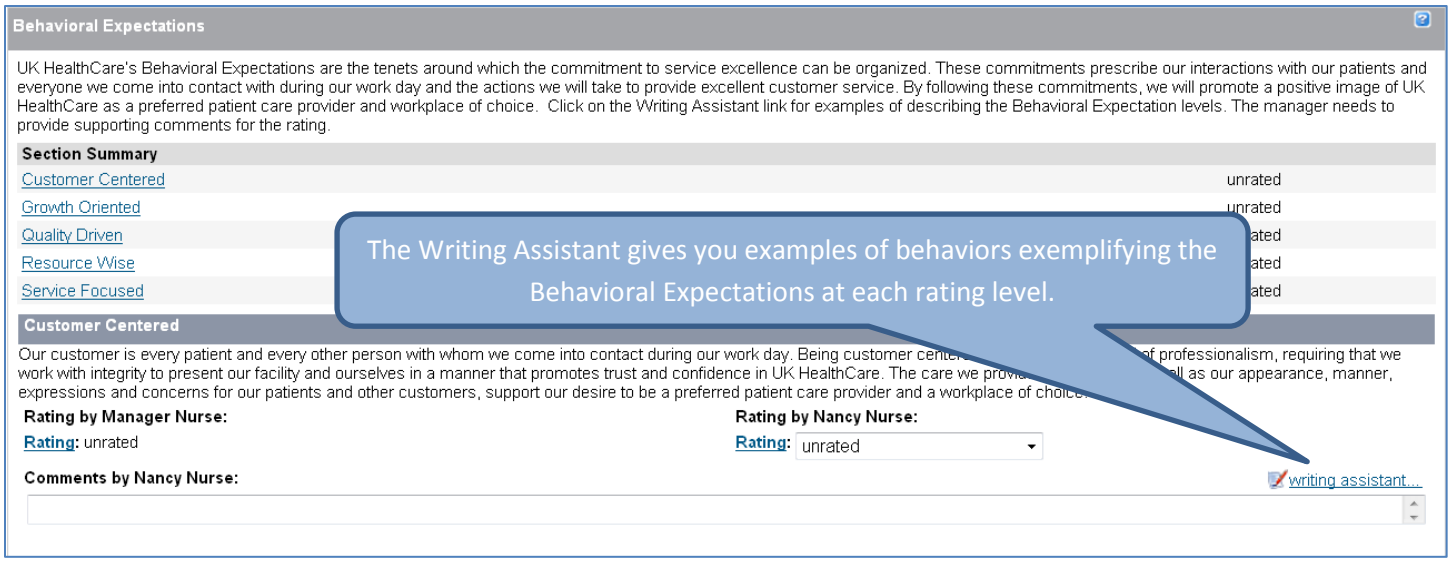
MJR Non Leadership Rating Scale

Scale Value	Description	Detailed Information
1.0	Does Not Meet Expectations	• Employee did not consistently meet the job standards • Performance needs improvement in areas of consistent weakness • Employee requires close supervision to meet expectations • If employee fails to improve, corrective action may be recommended
2.0	Meets Expectations	• Employee consistently met the job standards • Results were timely and accurate and were produced with minimum supervision • Employee recognized and adjusted well to changes in work situations and assignments • Solid, good performance was the employee's norm
3.0	Occasionally Exceeds Expectations	• Employee periodically exceeded the job standards • Employee achieved results above expectations • Employee showed exceptional performance and effort from time to time • Performance is sustained and uniformly high with thorough and on time results
4.0	Consistently Exceeds Expectations	• Employee clearly and consistently exceeded the job standards • Exceptional performance and effort was the employee's norm • Employee achieved results well beyond expectations • Employee contributed unique, innovative and workable solutions to projects and/or problems

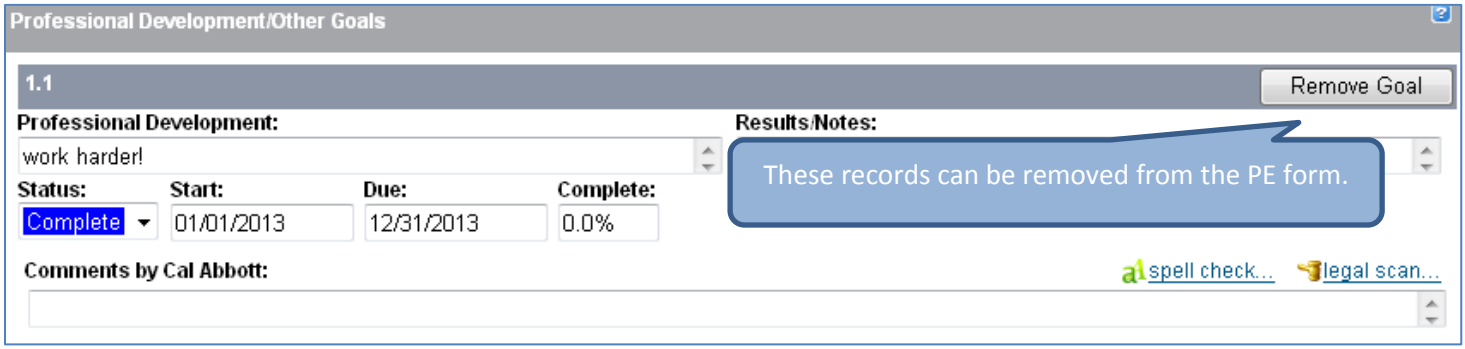
Close Window

Completing the PE Process - Step One: Employee Self Evaluation, continued

Below the MJR sections, you will find the Behavioral Expectations. These can be rated on a 1 to 3 level and are not included in the overall PE score, unless you are UK HealthCare Leadership.



Any professional development goals entered on the Professional Development Goal Plan will be included at the bottom of the PE form. There are no rating fields for these goals as they are not included in the overall PE score.



	The PE form can be saved at any time by clicking on the **Save** button at the top of the screen.
Save and Close	The PE form can also be saved and closed to allow for multiple work sessions. To do this, click on the **Save and Close** button at the bottom of the screen.
Send to Manager	The employee sends the PE form to their manager by clicking on the **Send to Manager** button which is at the top and bottom of the PE form. ***After the Legal Scan, there is a second confirmation step that must be completed before the form is sent to the manager.***

Completing the PE Process - Step Two: Manager Review

After the employee sends the PE form to the manager, it is now time for the manager to input their ratings and comments related to the employee's performance.

1.1 Quality and Safety for Patient Care, Documentation

Major Job Responsibility: Quality and Safety for Patient Care, Documentation

Weight: 25.0%

Start:	Due:	MJR Rating:
07/01/2013	06/30/2014	0.00

Essential Functions

Mgr Rating (1-4)	Essential Function	EE Rating (1-4)
0	1. Care plans and their implementation are completed accurately and within appropriate time parameters.	0
0	2. Clinical interventions are appropriate, timely and evidence based	0
0	3. Patient teaching is completed appropriately and within time parameters	0
0	4. Possesses knowledge of Core Measures , NSI and other key metrics and successf	

Results/Notes

Date	Result/Note
10/28/2013	test note
11/13/2013	excellent work today

Manager Rating: 0.00

Manager Nurse's Comments:

Nancy Nurse's Comments:

Add supporting notes here.

Employee fields are now viewable by the manager. These fields are locked and the manager cannot make any changes to what the employee entered.

The manager fields are now open for input. The information entered in these fields will not be visible to the employee until the form is sent to the employee for signature.

After clicking on the Edit Goal button, you can enter ratings for each Essential Function.

Essential Functions:

Mgr Rating (1-4)	Essential Function	EE Rating (1-4)	Action
0	1. Care plans and their implementation are completed accurately and within appropriate time parameters.	0	
0	2. Clinical interventions are appropriate, timely and evidence based.	0	
0	3. Patient teaching is completed appropriately and within time parameters.	0	
0	4. Possesses knowledge of Core Measures , NSI and other key metrics and successfully demonstrates during patient care.	0	

Click the Save Changes button at the bottom of the screen when finished.

Completing the PE Process - Step Two: Manager Review, continued

Behavioral Expectations

Team Rater

UK HealthCare's Behavioral Expectations are the tenets around which the commitment to service excellence can be organized. These commitments prescribe our interactions with our patients and everyone we come into contact with during our work day and the actions we will take to provide excellent customer service. By following these commitments, we will promote a positive image of UK HealthCare as a preferred patient care provider and workplace of choice. Click on the Writing Assistant link for examples of describing the Behavioral Expectation levels. The manager needs to provide supporting comments for the rating.

Section Summary	
Customer Centered	2.0 - Meets Expectations
Growth Oriented	unrated
Quality Driven	unrated
Resource Wise	unrated
Service Focused	unrated

The Behavioral Expectations need to be part of the PE conversation even though they are not included in the overall PE rating, with the exception of UK HealthCare Leadership.

Customer Centered

Our customer is every patient and every other person with whom we come into contact during our work day. Being customer centered demands a high level of professionalism, requiring that we work with integrity to present our facility and ourselves in a manner that promotes trust and confidence in UK HealthCare. The care we provide our patients, as well as our appearance, manner, expressions and concerns for our patients and other customers, support our desire to be a preferred patient care provider and a workplace of choice.

Rating by Manager Nurse:

Rating: 2.0 - Meets Expectations

Rating by Nancy Nurse:

Rating: 2.0 - Meets Expectations

Comments by Nancy Nurse:

Add supporting comments here.

Comments by Manager Nurse:

writing assistant...

Manager's supporting comments entered here.

Team Rater	You can use the Team Rater function to rate multiple employees on Behavioral Expectations at the same time.

2014 Nursing Performance Evaluation Behavioral Expectations

Save | Cancel | Print Preview

Save any changes made.

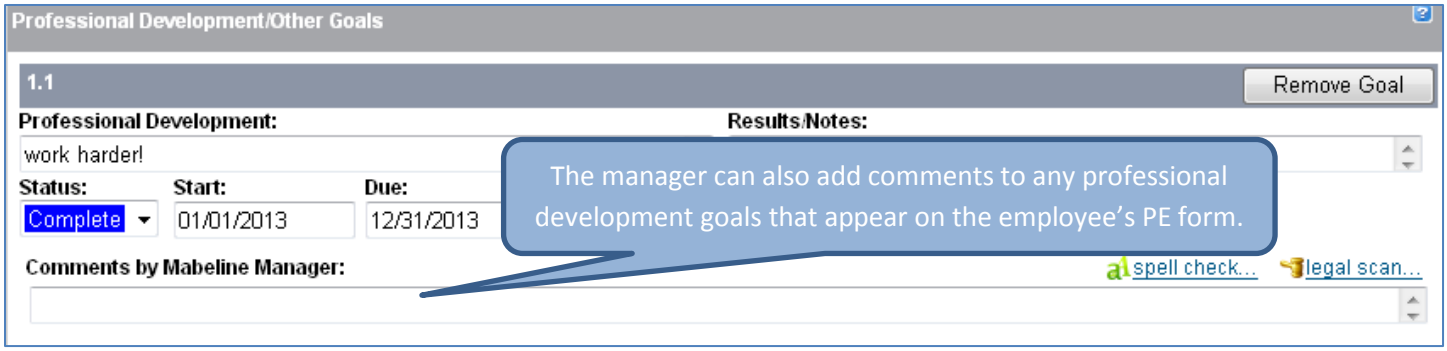
	Barry NCT	Carey NCT	Harry NCT	Mary NCT	Nancy Nurse	Teddy Nurse
Customer Centered	1 **2** 3	1 2 3	1 2 3	1 2 3	1 **2** 3	1 2 **3**
Growth Oriented	**1** 2 3	1 2 3	1 2 3	1 2 3	1 2 3	1 **2** 3
Quality Driven	1 2 **3**	1 2 3	1 2 3	1 2 3	1 2 3	1 2 **3**
Resource Wise	1 2 **3**	1 2 3	1 2 3	1 2 3	1 2 3	1 2 **3**
Service Focused	1 2 **3**	1 2 3	1 2 3	1 2 3	1 2 3	1 **2** 3

Any comments entered will feed back to the employee's PE form.

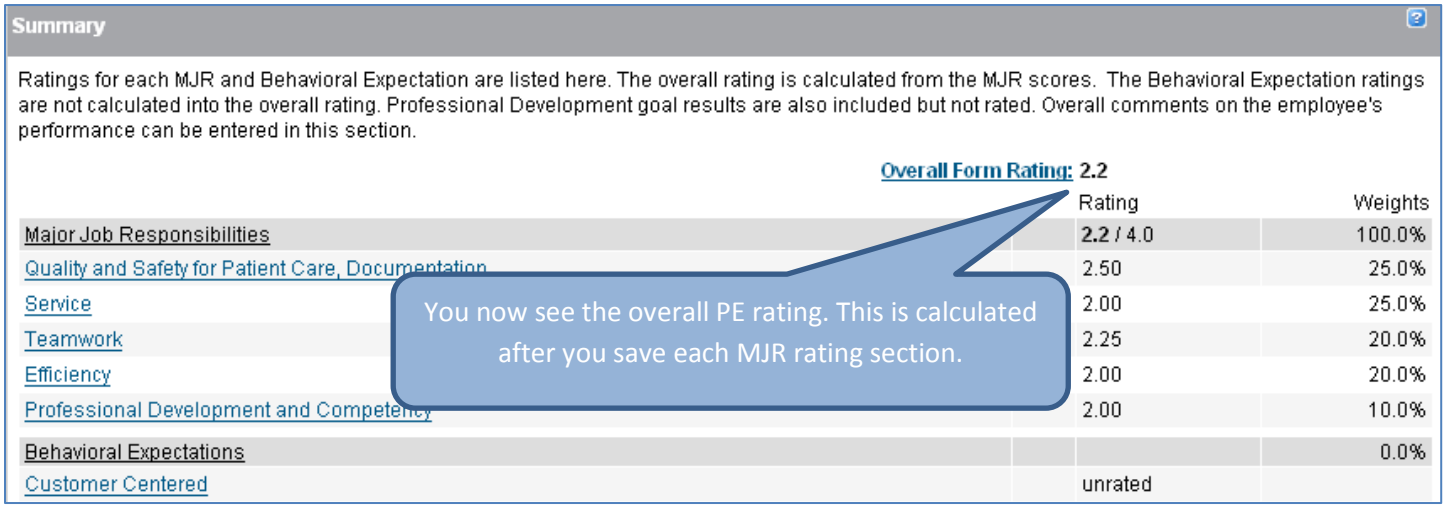
Click on the desired rating.

Click the I'm Done button to return to the PE form.

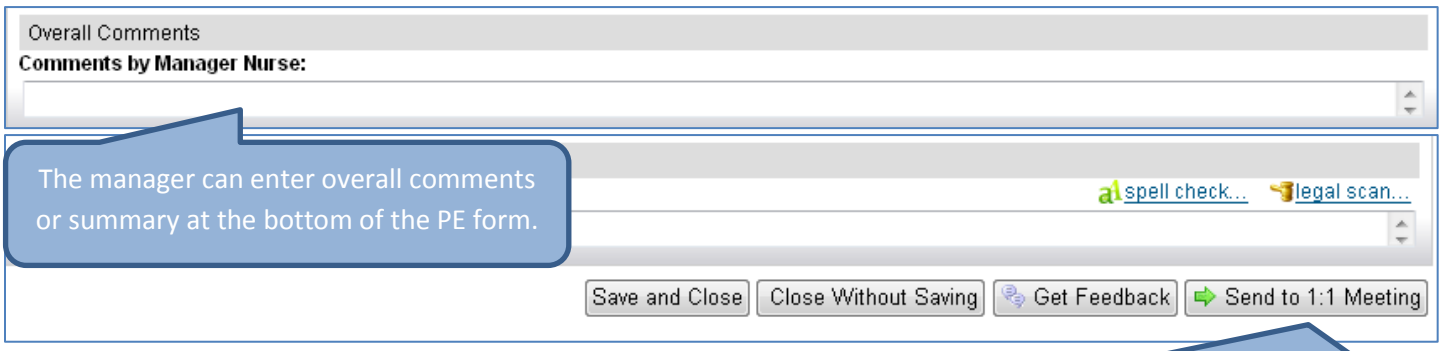
Completing the PE Process - Step Two: Manager Review, continued



The manager can also add comments to any professional development goals that appear on the employee's PE form.



You now see the overall PE rating. This is calculated after you save each MJR rating section.



The manager can enter overall comments or summary at the bottom of the PE form.

Click the **Send to 1:1 Meeting** button to advance the PE form to the next step. This button is also located at the top of the PE form.

Completing the PE Process - Step Three: 1:1 Meeting

The PE form is parked at the 1:1 Meeting step until the face-to-face meeting between the manager and employee has occurred. While the form is in this step:

- Upper-level management can review PE forms for employees in their direct reporting line
- Employees cannot view any ratings or comments entered by their manager
- The manager can use the Online PE System to display the PE form, or print a hard copy for use during the face-to-face meeting
- Managers can make edits to their fields on the PE form based on information gained during the face-to-face meeting with the employee

Send to Employee for Signature	After the face-to-face meeting has occurred and any edits made, the manager will send the PE form to the employee for signature using the **Send to Employee for Signature** button. This button can be found at the top and bottom of the PE form.

Completing the PE Process - Step Four: Employee Signature

In this step, the employee can view the completed PE form, seeing the manager's ratings and comments and the overall PE rating. These fields are now locked and no changes can be made.

Major Job Responsibility: Quality and Safety for Patient Care, Documentation — **Weight:** 25.0%

Start:	Due:	MJR Rating:
07/01/2013	06/30/2014	3.00

Essential Functions

Mgr Rating (1-4)	Essential Function	EE Rating (1-4)
3	1. Care plans and their implementation are completed accurately and within appropriate time parameters.	4
3	2. Clinical interventions are appropriate, timely and evidence based.	3
3	3. Patient teaching is completed appropriately and within time parameters.	3
3	4. Possesses knowledge of Core Measures , NSI and other key metrics and successfully demonstrates during patient care.	4

]] Results/Notes

Date	Result/Note
03/21/2014	Test notes
03/21/2014	Test
03/21/2014	Mgr test note

Manager Rating: 3.00

Manager Nurse's Comments: Manager's supporting comments here.

Nancy Nurse's Comments: Add supporting notes here.

Summary

Ratings for each MJR and Behavioral Expectation are listed here. The overall rating is calculated from the MJR scores. The Behavioral Expectation ratings are not calculated into the overall rating. Professional Development goal results are also included but not rated. Overall comments on the employee's performance can be entered in this section.

Overall Form Rating: 2.2

	Rating	Weights
Major Job Responsibilities	2.2 / 4.0	100.0%
Quality and Safety for Patient Care, Documentation	2.50	25.0%
Service	2.00	25.0%

Overall Comments

Comments by Manager Nurse:
Manager's overall comments entered here.

The employee can view the overall comments entered by the manager.

Signature

Sign below

Employee: _____
Nancy Nurse

Manager: _____
Manager Nurse

The employee's signature acknowledges the one-to-one conversation has taken place and the PE form has been reviewed. The signature does not necessarily mean the employee agrees with the content of the PE form.

Section Comments:

Comments by Nancy Nurse:

The employee has the opportunity to add final comments of their own.

Save and Close | Close Without Saving | Sign | Manager Nurse

The employee clicks on the **Sign** button to electronically sign the PE form and send it to the manager.

Completing the PE Process - Step Five: Manager Signature

Overall Comments

Comments by Manager Nurse:
Manager's overall comments entered here.

Signature

Sign below

Employee: *Nancy Nurse* *04/23/2014*
Nancy Nurse

Manager:
Manager Nurse

Section Comments:

Comments by Nancy Nurse:
Employee's final comments entered here.
Comments by Manager Nurse:
Manager's final comments entered here.

Save and Close | Close Without Saving | Nancy Nurse | Sign

The manager can view any final comments added by the employee during the previous step.

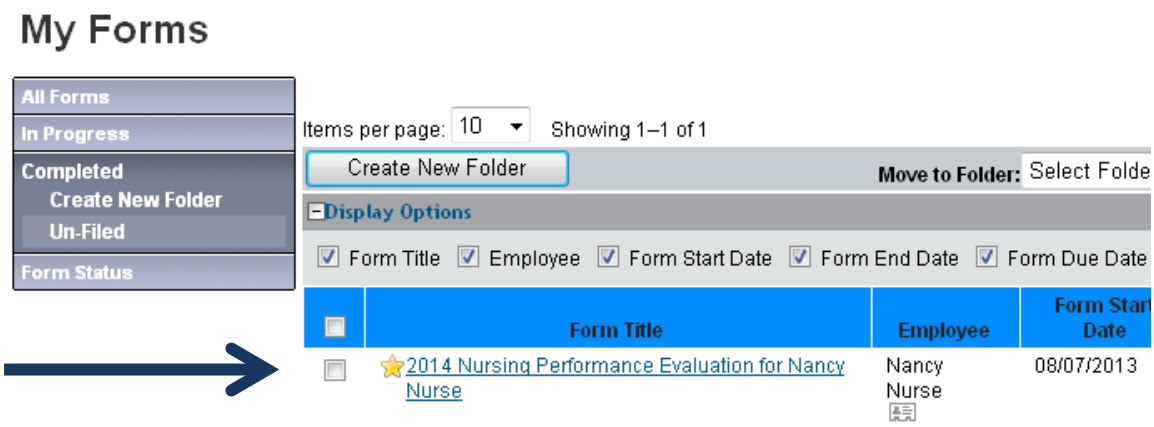
Click on the **Sign** button to electronically sign the PE form to complete the process.

The manager can now add their final comments before signing.

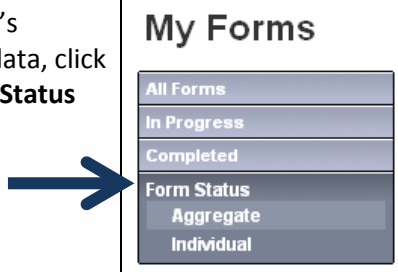
Viewing Completed PE Forms and Completion Status

To view completed PE forms, go to your **Performance** page, click on the **Completed** section,

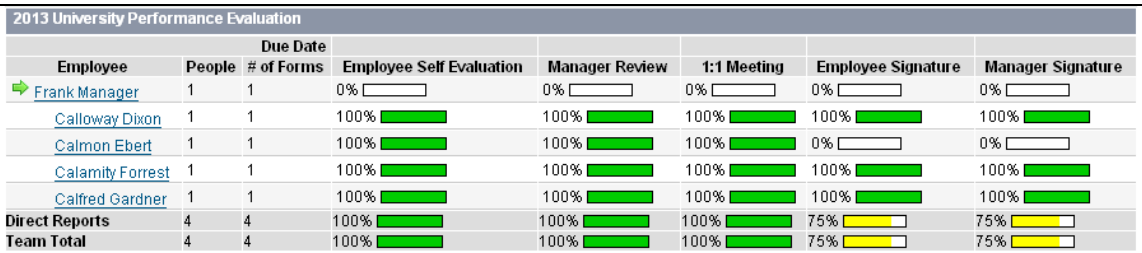
- Click on the link in the **Form Title** column to view completed PE forms



To get a quick visual of your team's completion data, click on the **Form Status** link



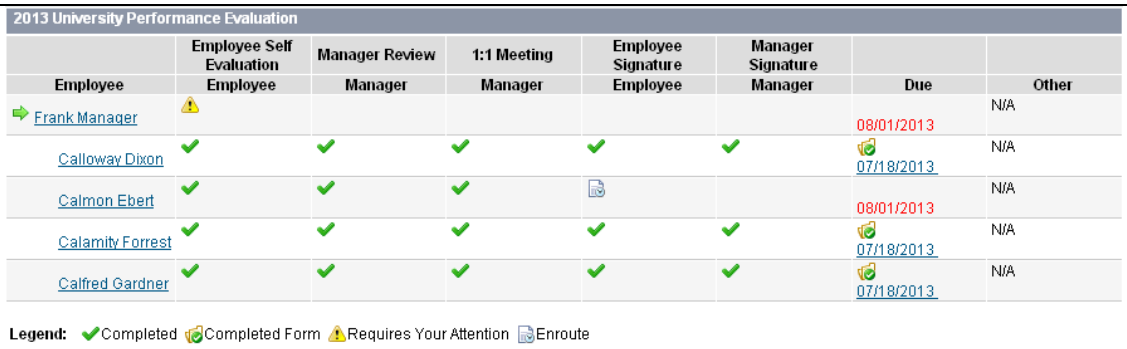
- **Form Status** section: **Aggregate** view



2013 University Performance Evaluation

Employee	People	Due Date # of Forms	Employee Self Evaluation	Manager Review	1:1 Meeting	Employee Signature	Manager Signature
Frank Manager	1	1	0%	0%	0%	0%	0%
Calloway Dixon	1	1	100%	100%	100%	100%	100%
Calmon Ebert	1	1	100%	100%	100%	0%	0%
Calamity Forrest	1	1	100%	100%	100%	100%	100%
Calfred Gardner	1	1	100%	100%	100%	100%	100%
Direct Reports	4	4	100%	100%	100%	75%	75%
Team Total	4	4	100%	100%	100%	75%	75%

- **Form Status** section: **Individual** view



2013 University Performance Evaluation

Employee	Employee Self Evaluation Employee	Manager Review Manager	1:1 Meeting Manager	Employee Signature Employee	Manager Signature Manager	Due	Other
Frank Manager	⚠					08/01/2013	N/A
Calloway Dixon	✔	✔	✔	✔	✔	07/18/2013	N/A
Calmon Ebert	✔	✔	✔			08/01/2013	N/A
Calamity Forrest	✔	✔	✔	✔	✔	07/18/2013	N/A
Calfred Gardner	✔	✔	✔	✔	✔	07/18/2013	N/A

Legend: ✔Completed Completed Form ⚠Requires Your Attention Enroute