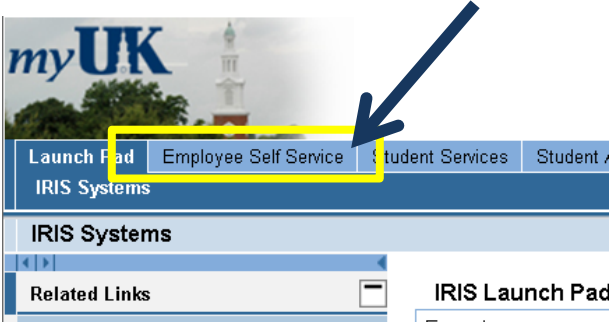
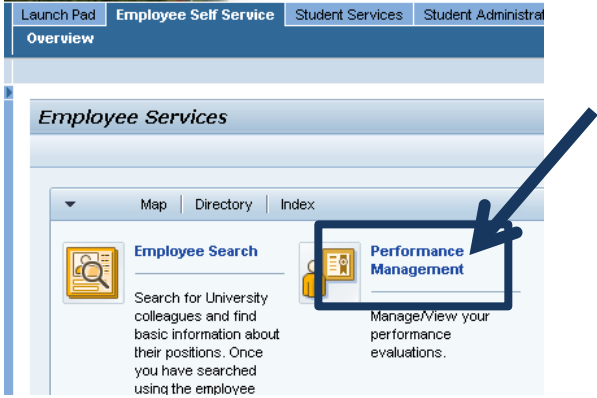
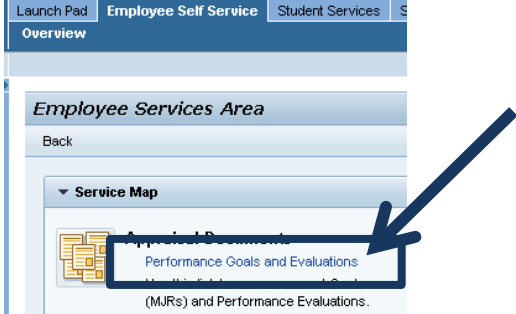


# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Online PE System Overview

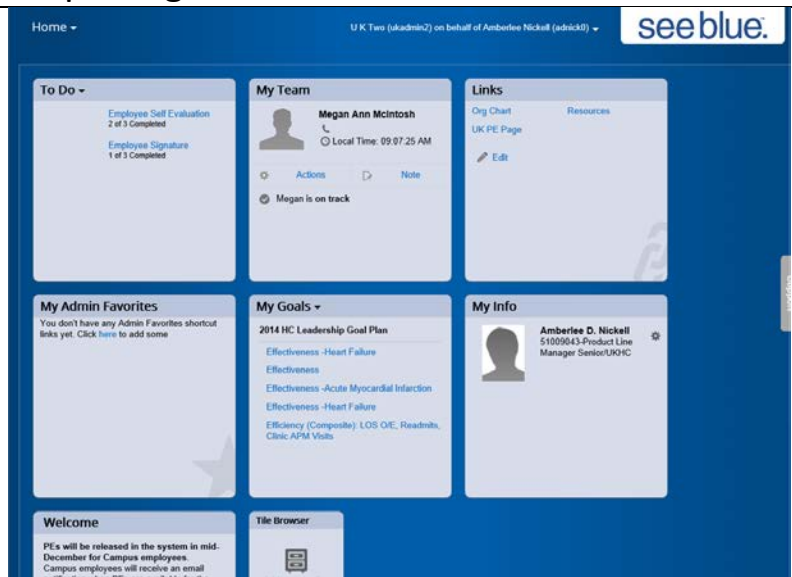
The Online PE System contains a Goal Plan that houses your Individual and Enterprise Goals. The Goal Plan is available all year long so you can document accomplishments and milestones as they occur. The year-end process starts with your Goal Plan.

### Access the UK Online PE System via myUK

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

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

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



**Final Results are entered in your Goal Plan.**

## Getting to Your Goal Plan from the Home Page

To access your Goal Plan:

- Use the **Navigation Menu** by clicking on **Home**, then selecting **Goals**

OR

- Click on any of the **goal links** in the **My Goals** Tile



# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Entering Final Results

For Fiscal Year 2014 you will have a maximum of two Individual and three Enterprise Goals. Make sure the Total Weight of your goals equals 100%.

**2014 HC Leadership Goal Plan for Amberlee D. Nickell** Switch Plan: 2014 HC Leadership Goal Plan

For 2014, please select up to three(3) Enterprise Goals from the Goal Library and up to two (2) Individual Goals to Indicate your specific contributions to UKHC Goals.

Cascade Selected... Delete Selected Goal Wizard Create a New Goal Copy From Other Goal Plan

**Employee Hierarchy**




Angela M Lang (amlang00) Find user:  Go [Advanced search](#)

Amberlee D. Nickell (adnick0) Megan Ann McIntosh (mamcin2)

**Display Options**

(Max:5) Total Weight: 100.0%

Individual - Maximum 2 Goals

#	Goal Name	Metric	Start	Due	Weight	Rating	Action
<input type="checkbox"/>	1.2 Effectiveness	Overall	07/01/2013	06/30/2014	20.0%	3	  

Scoring Metrics:

Achievement	Rating	Description
3	1	Does Not Meet Goal
4	2	Threshold
6	3	Target
8	4	Max

Monthly Updates:

Use the Edit Goal button to access the form to enter your final result for each goal.

To get information about Enterprise Goal Results use:

- Quality Close reports dated July 30
- Stoptight Patient Satisfaction Scores dated July 30 - 31

Enter the scoring in the **Final Result:** field and the corresponding rating will appear.


**Scoring Metrics:** Rating Scale HC Leadership Rating Scale Set Scale

Achievement	Rating	Description	Action
<input type="text" value="20"/>	<input type="text" value="1"/>	Does Not Meet Goal	
<input type="text" value="40"/>	<input type="text" value="2"/>	Threshold	
<input type="text" value="60"/>	<input type="text" value="3"/>	Target	
<input type="text" value="80"/>	<input type="text" value="4"/>	Max	

**Final Result:**

**Rating:**

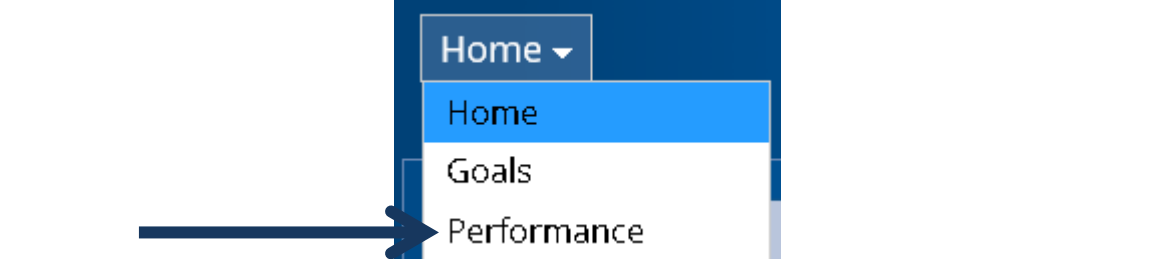
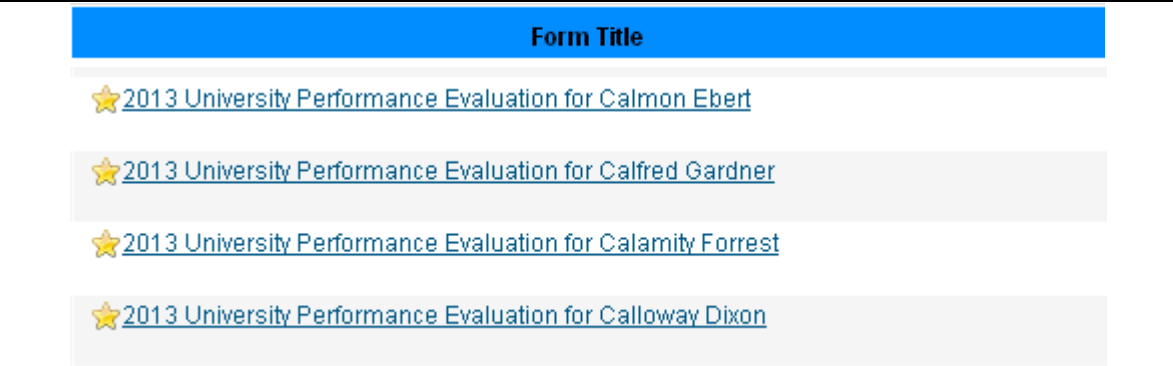
Click on the **Save Changes** button when complete.



After all final results have been entered and saved; you will need to access the PE Form to complete the PE process.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Accessing Performance Evaluation Forms

<p>From the <b>Home Page</b>, click on the <b>Navigation Menu</b> and choose <b>Performance</b></p>		
<p>There are four main sections in the <b>My Forms</b> menu</p>	<p><b>All Forms:</b> contains all forms, currently active or completed</p> <p><b>Completed:</b> contains all completed forms</p> <p><b>Form Status:</b> view form status</p>	<p><b>My Forms</b></p> <ul style="list-style-type: none"> <li>All Forms</li> <li>In Progress             <ul style="list-style-type: none"> <li>Inbox</li> <li>En Route</li> </ul> </li> <li>Completed</li> <li>Form Status</li> </ul> <p><b>In Progress: <i>Inbox</i></b> - contains active forms requiring your attention</p> <p><i>En Route</i> – contains active forms “currently with” another person in the PE process, this is normally the employee</p>
<p>From any of the sections, Click on the PE link you would like to view in the <b>Form Title</b> column</p>		

## 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.

**Performance Evaluation Introduction**

The employee will complete the review and then forward to their manager. The manager will then complete their section, have a discussion with the employee. Once this is complete both parties will sign the form.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## 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 goal has its own section where you can enter comments to support your ratings / results. **Your Individual and Enterprise Goals account for 75% of your overall performance evaluation score.**

**Reminder!**

### Leadership Goals

**IMPORTANT: DO NOT enter or update the Final Rating for each goal in this form. Enter Final Ratings ONLY in the HC Leadership Goal Plan in order to calculate the goal rating. Any Final Result entered or updated in the Performance Evaluation form will not calculate the goal rating.**

1.1

Goal Type: Individual - Maximum 2 Goals

Goal Name :	Metric :	Start :	Due :	Weight :	Final Result :
Effectiveness -Heart Failure	can type anything	07/01/2013	06/30/2014	20.0%	1

Scoring Metrics :

Achievement Rating	Description
0.93	1 Does Not Meet Goal
0.95	2 Threshold
0.98	3 Target
1	4 Max

Monthly Updates :

Date	Actual
	test <a href="#">delete</a>

[Add Monthly Update](#)

Milestones :

Description	Date
test <a href="#">delete</a>	

[Add Milestones](#)

Rating: 4


Angela M Lang's Comments:

No comments

Subjects Comments:

Employee fields are open for input. This information will not be visible to the manager until the form is sent to the manager.

Manager fields are not open for input in this step.

**Tip:** Save often so you don't lose any of the information you have entered. Click on the **Save** button  at the top of the screen to save the form and continue working.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

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

Below the Goal sections, you will find the Behavioral Expectations that apply to UK HealthCare Employees. **These account for 25% of your overall performance evaluation score since you are UK HealthCare Leadership.**

**Behavioral Expectations**

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](#)
- [Growth Oriented](#)
- [Quality Driven](#)
- [Resource Wise](#)
- [Service Focused](#)

**Customer Centered**

Our customer is every patient and every other person with whom we come into contact during our work day. Being customer centered requires 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, show our desire to be a preferred patient care provider and a workplace of choice.

**Rating by Angela M Lang:**  
[Rating:](#) Rating

**Angela M Lang Comments:**  
 No comments

**Rating by Amberlee D. Nickell:**  
[Rating:](#) Rating

**Amberlee D. Nickell Comments:**  
[writing assistant...](#)

The Writing Assistant gives you examples of behaviors exemplifying the Behavioral Expectations at each rating level.

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.

**Professional Development**

**1.1** Remove Goal

**Professional Development:** Participates on division wide committees

**Results/Notes:** Completed 2

**Status:** None **Start:** 01/01/2013 **Due:** 12/31/2015 **Complete:** 0.0%

**Comments by Amberlee D. Nickell:**

These records can be removed from the PE form.

<input type="button" value="Save and Close"/>	The PE form can be saved and closed to allow for multiple work sessions. To do this, click on the <b>Save and Close</b> button at the bottom of the screen.
<input type="button" value="Send to Manager"/>	The employee sends the PE form to their manager by clicking on the <b>Send to Manager</b> button which is at the top and bottom of the PE form.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Completing the PE Process - Step Two: Manager Review

After you send the PE form to your manager, it is now time for the manager to enter their comments related to your performance and Behavioral Expectations ratings.

**Leadership Goals**

**IMPORTANT: DO NOT enter or update the Final Rating for each goal in this form. Enter Final Ratings ONLY in the HC Leadership Goal Plan in order to calculate the goal rating. Any Final Result entered or updated in the Performance Evaluation form will not calculate the goal rating.**

**1.1**

Goal Type: Individual - Maximum 2 Goals

Goal Name : Effectiveness -Heart Failure    Metric : can type anything    Start : 07/01/2013    Due : 06/30/2014    Weight : 20.0%    Final Result : 1

Scoring Metrics :

Achievement	Rating	Description
0.93	1	Does Not Meet Goal
0.95	2	Threshold
0.98	3	Target
1	4	Max

Monthly Updates :

Date	Actual
	test

Milestones :

Description	Date
test	

Rating: 4

Angela M Lang's Comments:    Subjects Comments: No comments

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

**Behavioral Expectations**

UK HealthCare's Behavioral commitments prescribe our... take to provide excellent cu... patient care provider and w... The manager needs to prov...

ellence can be organized. These... ng our work day and the actions we will... e image of UK HealthCare as a preferred... riber the Behavioral Expectation levels.

Section Summary	Rating
<a href="#">Customer Centered</a>	Rating
<a href="#">Growth Oriented</a>	Rating
<a href="#">Quality Driven</a>	Rating
<a href="#">Resource Wise</a>	Rating
<a href="#">Service Focused</a>	Rating

**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 Angela M Lang: Rating: Rating

Angela M Lang Comments: writing assistant...

Rating by Amberlee D. Nickell: Rating: 2.0 - Meets Expectations

Amberlee D. Nickell Comments: No comments

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.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

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

**Professional Development**

**1.1** Remove Goal

**Professional Development:** Participates on division wide committees

**Results/Notes:**

**Status:** None **Start:** 01/01/2013 **Due:** 12/31/2015 **Complete:** 0.0%

**Comments by Angela M Lang:**

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

**Summary**


Use this section to summarize the employee's performance during the review period.

**Calculated Form Overall Rating 3.1 / 4.0**

<b>Leadership Goals</b>	<b>Rating</b>
<a href="#">Effectiveness -Heart Failure</a>	3.2 / 4.0
<a href="#">Effectiveness</a>	4
<a href="#">Effectiveness -Acute Myocardial Infarction</a>	3
<a href="#">Effectiveness -Heart Failure</a>	3
<a href="#">Effectiveness -Heart Failure</a>	4
<a href="#">Efficiency (Composite): LOS O/E, Readmits, Clinic APM Visits</a>	2
<b>Behavioral Expectations</b>	<b>2.2 / 3.0</b>
<a href="#">Customer Centered</a>	2.0 - Meets Expectations
<a href="#">Growth Oriented</a>	3.0 - Exceeds Expectations
<a href="#">Quality Driven</a>	2.0 - Meets Expectations
<a href="#">Resource Wise</a>	2.0 - Meets Expectations
<a href="#">Service Focused</a>	2.0 - Meets Expectations
<b>Professional Development</b>	
<a href="#">Participates on division wide committees</a>	
<a href="#">Participates in patient satisfaction initiatives</a>	

**Overall Comments**

**Comments by Angela M Lang:**

The overall PE rating won't be calculated until the PE form is saved. Click on the **Save** button  at the top of the screen to calculate the PE rating and reveal the individual Behavioral Expectations ratings.

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.

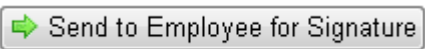


# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## 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 goal comment fields and Behavioral Expectations on the PE form based on information gained during the face-to-face meeting with the employee. *If Final Results corrections are needed, return to the Goal Plan to make those corrections.*

	<p>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 <b>Send to Employee for Signature</b> button. This button can be found at the top and bottom of the PE form.</p>
---	---

## Completing the PE Process - Step Four: Employee Signature

In this step, you 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.**

**Leadership Goals** ?

IMPORTANT: DO NOT enter or update the Final Rating for each goal in this form. Enter Final Ratings ONLY in the HC Leadership Goal Plan in order to calculate the goal rating. Any Final Result entered or updated in the Performance Evaluation form will not calculate the goal rating.

**1.1**

Goal Type: Individual - Maximum 2 Goals

Goal Name : Effectiveness -Heart Failure      Metric : can type anything      Start : 07/01/2013      Due : 06/30/2014      Weight : 20.0%      Final Result : 1

Scoring Metrics :

Achievement	Rating	Description
0.93	1	Does Not Meet Goal
0.95	2	Threshold
0.98	3	Target
1	4	Max

Monthly Updates :

Date	Actual
	test

Milestones :

Description	Date
test	

**Rating:**

Angela M Lang's Comments: Subjects Comments:  
No comments No comments

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Completing the PE Process - Step Four: Employee Signature - continued

Behavioral Expectations	
<p>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.</p>	
<b>Section Summary</b>	<b>2.4 / 3.0</b>
<a href="#">Customer Centered</a>	2.0 - Meets Expectations
<a href="#">Growth Oriented</a>	3.0 - Exceeds Expectations
<a href="#">Quality Driven</a>	2.0 - Meets Expectations
<a href="#">Resource Wise</a>	2.0 - Meets Expectations
<a href="#">Service Focused</a>	3.0 - Exceeds Expectations

Summary	
<p>Use this section to summarize the employee's performance during the review period.</p>	
<b>Calculated Form Overall Rating 3.2 / 4.0</b>	
	Rating
<b>Leadership Goals</b>	<b>3.2 / 4.0</b>
<a href="#">Effectiveness -Heart Failure</a>	4
<a href="#">Effectiveness</a>	3
<a href="#">Effectiveness -Acute Myocardial Infarction</a>	3
<a href="#">Effectiveness -Heart Failure</a>	4
<a href="#">Efficiency (Composite): LOS O/E, Readmits, Clinic APM Visits</a>	2
<b>Behavioral Expectations</b>	<b>2.4 / 3.0</b>
<a href="#">Customer Centered</a>	2.0 - Meets Expectations
<a href="#">Growth Oriented</a>	3.0 - Exceeds Expectations
<a href="#">Quality Driven</a>	2.0 - Meets Expectations
<a href="#">Resource Wise</a>	2.0 - Meets Expectations
<a href="#">Service Focused</a>	3.0 - Exceeds Expectations

The employee can view the overall comments entered by the manager, if any.

Signature	
<p>The electronic signature belows represent your acknowledgement of this form.</p>	
Employee:	Amberlee D. Nickell
Manager:	Angela M Lang
Section Comments:	
Comments by Amberlee D. Nickell:	
<input type="button" value="Save and Close"/> <input type="button" value="Close Without Saving"/> <input type="button" value="Sign"/> <input type="button" value="Angela M Lang"/>	

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.

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

Click on the **Sign** button to electronically sign the PE form and send it to the manager.

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Completing the PE Process - Step Five: Manager Signature

**Signature**



The electronic signature belows represent your acknowledgement of this form.

Employee: Amberlee D. Nickell 07/22/2014  
Amberlee D. Nickell

Manager: \_\_\_\_\_  
Angela M Lang

Section Comments:  
**Comments by Angela M Lang:**

\_\_\_\_\_

Save and Close Close Without Saving  Amberlee D. Nickell  Sign


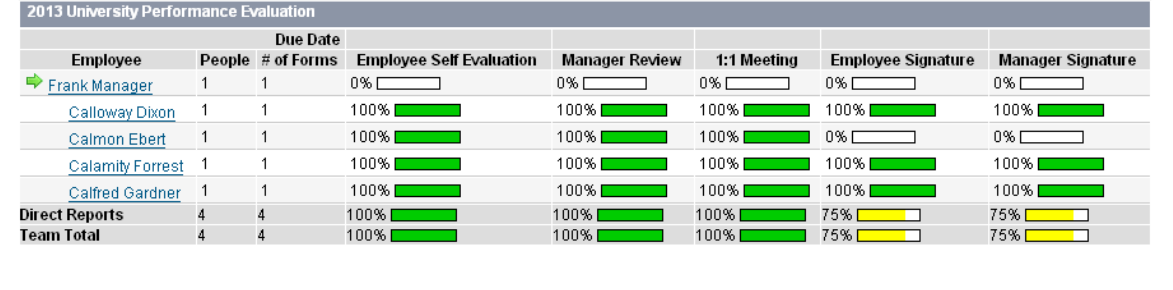
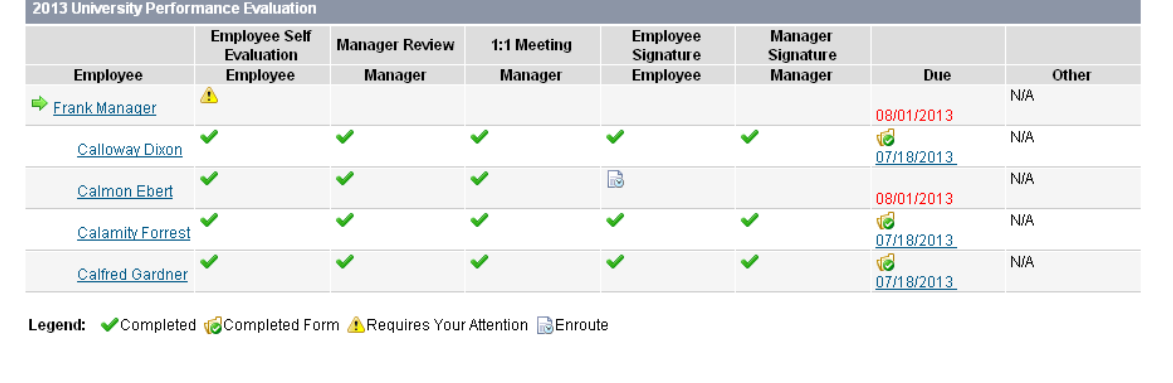
The manager can view any final comments added by the employee during the previous step.

The manager can now add their final comments before signing.

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

# UK Online PE System – Completing the PE Process – UK HealthCare Leadership

## Viewing Completed PE Forms and Completion Status

<p>To view completed PE forms, go to your <b>Performance</b> page, click on the <b>Completed</b> section,</p> <ul style="list-style-type: none"> <li>Click on the link in the <b>Form Title</b> column to view completed PE forms</li> </ul>	 <p><b>My Forms</b></p> <p>All Forms In Progress <b>Completed</b> Create New Folder Un-Filed Form Status</p> <p>Items per page: 10 Showing 1–7 of 7</p> <p>Create New Folder</p> <p>Move to Folder: Select Folder Move</p> <p>Display Options</p> <p><input checked="" type="checkbox"/> Form Title <input checked="" type="checkbox"/> Employee <input checked="" type="checkbox"/> Form Start Date <input checked="" type="checkbox"/> Form End Date <input checked="" type="checkbox"/> Form Due Date <input checked="" type="checkbox"/> Completed On</p> <table border="1"> <thead> <tr> <th>Form Title</th> <th>Employee</th> <th>Form Start Date</th> <th>Form End Date</th> </tr> </thead> <tbody> <tr> <td><a href="#">★2013 University Performance Evaluation for Cal Abbott</a></td> <td>Cal Abbott</td> <td>01/01/2013</td> <td>12/31/2013</td> </tr> </tbody> </table>	Form Title	Employee	Form Start Date	Form End Date	<a href="#">★2013 University Performance Evaluation for Cal Abbott</a>	Cal Abbott	01/01/2013	12/31/2013																																																																
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<ul style="list-style-type: none"> <li><b>Form Status</b> section: <b>Aggregate</b> view</li> </ul>	 <p>2013 University Performance Evaluation</p> <table border="1"> <thead> <tr> <th></th> <th>Employee</th> <th>People</th> <th># of Forms</th> <th>Employee Self Evaluation</th> <th>Manager Review</th> <th>1:1 Meeting</th> <th>Employee Signature</th> <th>Manager Signature</th> </tr> </thead> <tbody> <tr> <td></td> <td>Frank Manager</td> <td>1</td> <td>1</td> <td>0% <input type="checkbox"/></td> <td>0% <input type="checkbox"/></td> <td>0% <input type="checkbox"/></td> <td>0% <input type="checkbox"/></td> <td>0% <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Calloway Dixon</td> <td>1</td> <td>1</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td>Calmon Ebert</td> <td>1</td> <td>1</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>0% <input type="checkbox"/></td> <td>0% <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Calamity Forrest</td> <td>1</td> <td>1</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td>Calfred Gardner</td> <td>1</td> <td>1</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> </tr> <tr> <td><b>Direct Reports</b></td> <td></td> <td>4</td> <td>4</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>75% <input type="checkbox"/></td> <td>75% <input type="checkbox"/></td> </tr> <tr> <td><b>Team Total</b></td> <td></td> <td>4</td> <td>4</td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>100% <input checked="" type="checkbox"/></td> <td>75% <input type="checkbox"/></td> <td>75% <input type="checkbox"/></td> </tr> </tbody> </table>		Employee	People	# of Forms	Employee Self Evaluation	Manager Review	1:1 Meeting	Employee Signature	Manager Signature		Frank Manager	1	1	0% <input type="checkbox"/>	0% <input type="checkbox"/>	0% <input type="checkbox"/>	0% <input type="checkbox"/>	0% <input type="checkbox"/>		Calloway Dixon	1	1	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>		Calmon Ebert	1	1	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	0% <input type="checkbox"/>	0% <input type="checkbox"/>		Calamity Forrest	1	1	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>		Calfred Gardner	1	1	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	<b>Direct Reports</b>		4	4	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	75% <input type="checkbox"/>	75% <input type="checkbox"/>	<b>Team Total</b>		4	4	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	100% <input checked="" type="checkbox"/>	75% <input type="checkbox"/>	75% <input type="checkbox"/>
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