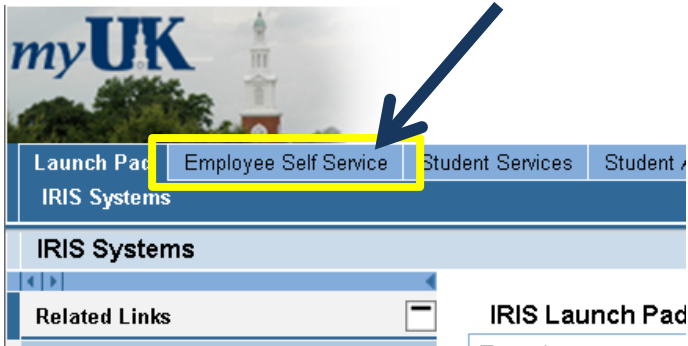
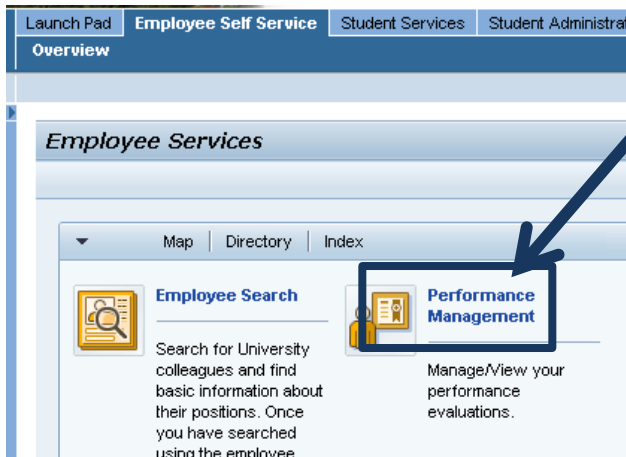



UK Online PE System – Managing the PE Process for Supervisors – Bedside Nurses and Nurse Care Techs

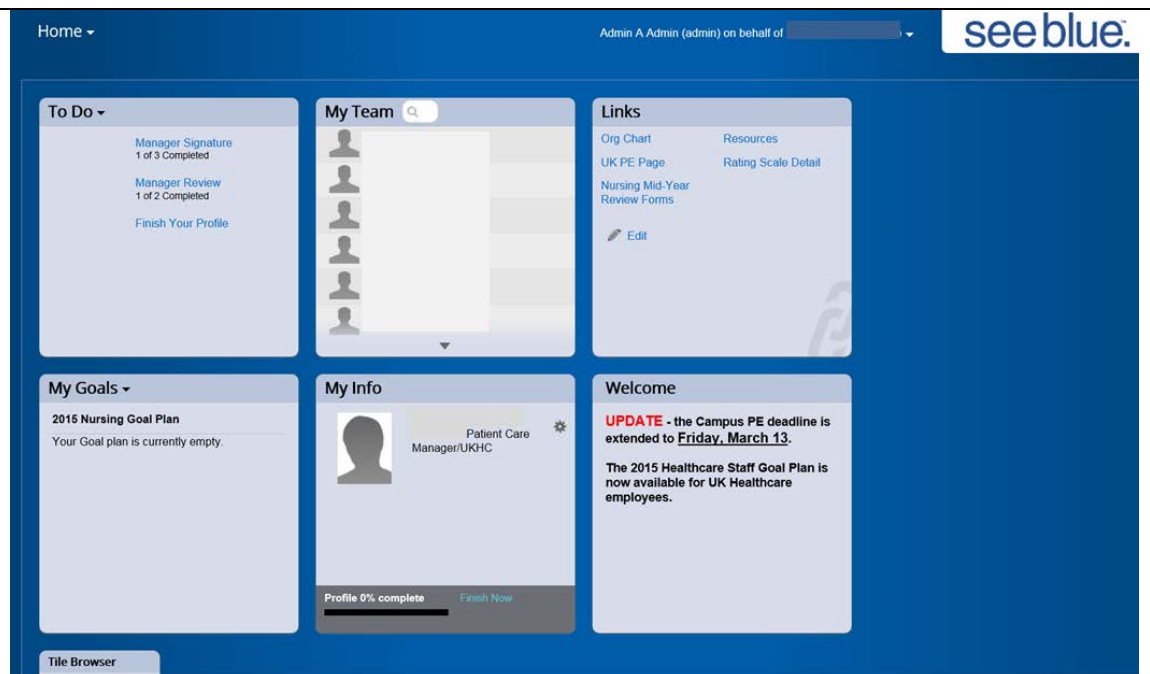
PE forms are not available year-round. PE forms are generated and released one to two months before the PE due date. For UK HealthCare employees, the release date is in May.

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.	

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

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

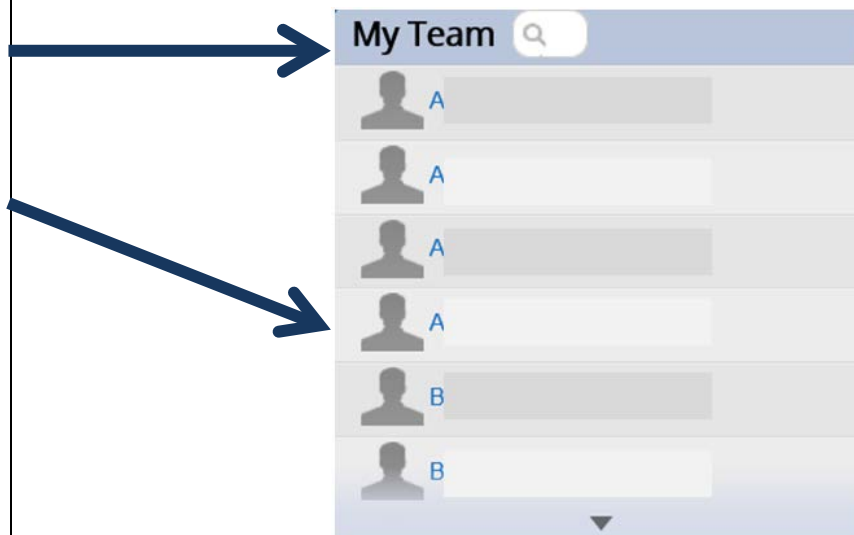


Basic Navigation – Accessing Employee Performance Evaluation Forms

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

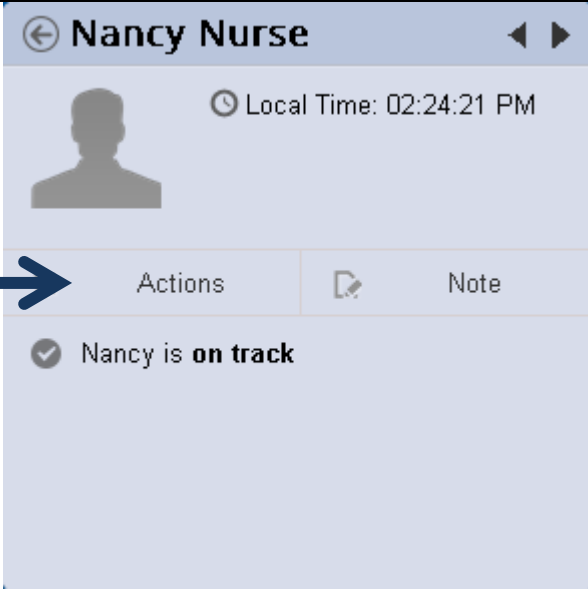
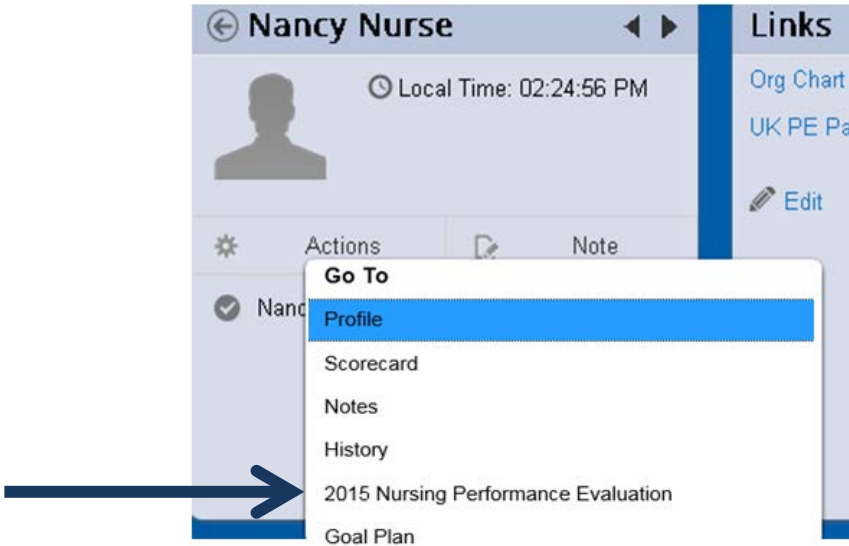
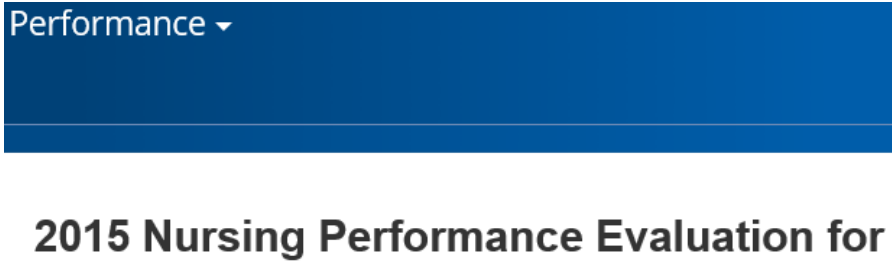
Option One:

- Locate the **My Team** tile
- Click on the employee record you wish to view



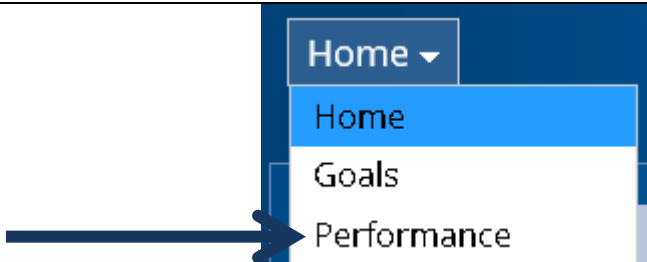


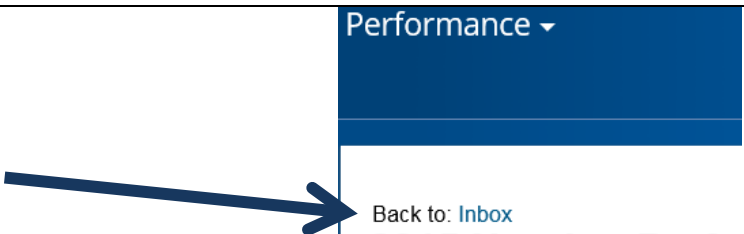
UK Online PE System – Managing the PE Process for Supervisors – Bedside Nurses and Nurse Care Techs

Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

<ul style="list-style-type: none"> Click on the Actions link 	
<ul style="list-style-type: none"> Click on the Performance Evaluation link 	
<ul style="list-style-type: none"> You are taken directly to the employee's PE form, if it has been released 	

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

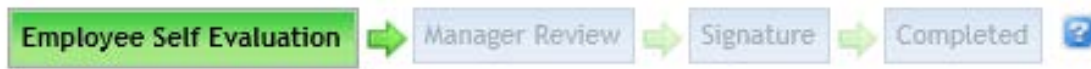
Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

<p>Option Two:</p> <ul style="list-style-type: none">From the Home Page, click on the Navigation Menu and choose Performance									
<ul style="list-style-type: none">There are four main sections in the My Forms menu	<p>All Forms: contains all forms, currently active or completed</p> <p>Completed: contains all completed forms</p> <p>Form Status: view form status</p>	<p>My Forms</p> <div><p>All Forms</p><p>In Progress</p><p>Inbox</p><p>En Route</p><p>Completed</p><p>Form Status</p></div>	<p>In Progress: <i>Inbox</i> - 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>						
<ul style="list-style-type: none">From any of the sections, Click on the PE link you would like to view in the Form Title column	 <table><thead><tr><th>Form Title</th><th>Employee</th><th>Step</th></tr></thead><tbody><tr><td>★ 2015 Nursing Performance Evaluation for</td><td></td><td>Manager Review</td></tr></tbody></table>			Form Title	Employee	Step	★ 2015 Nursing Performance Evaluation for		Manager Review
Form Title	Employee	Step							
★ 2015 Nursing Performance Evaluation for		Manager Review							
<ul style="list-style-type: none">You are taken to the employee's PE form	 <h2>2015 Nursing Performance Evaluation for</h2>								
<ul style="list-style-type: none">To return to the PE form listing, click on the Inbox link	 <p>Performance ▾</p> <p>Back to: Inbox</p> <h2>2015 Nursing Perfo</h2>								

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

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 may complete a self-evaluation and then forward to his or her manager. The manager will complete the evaluation and make it available for higher-level review. Once higher-level review is complete, the manager and employee will meet to discuss the evaluation. After the meeting additional comments or rating adjustments can be made. Once this is complete the employee and manager will sign the form.

Completing the PE Process - Step One: Employee Self Evaluation

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

2.1
Goal: UKHC
Major Job Responsibility : Quality and Safety for Patient Care
Essential Function : Care plans and their implementation are completed accurately and within parameters.
Job Standard :
To be determined by supervisor and employee
Weight : 5.0%
Start : 07/01/2014
Rating by
Manager Rating: unrated
Comments:
No comments

Due :
06/30/2015
Rating by
Rating: unrated
Subjects Comments:
[spell check...](#) [legal scan...](#)

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.

To review what the rating levels mean, click on the **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.

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

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

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 by the employee and the ratings input from the manager accounts for 10% of the overall PE rating.

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 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

Rating: Rating

Managers Comments:

No comments

Subjects Comments:

[writing assistant...](#) [spell check...](#) [legal scan...](#)

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

The Legal Scan can be used to identify words or phrases that might be inappropriate and unnecessary. It does not prevent the employee from using the words or phrases.

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 rating.

Professional Development/Other Goals

1.1

Professional Development:

My goal this year is to continue to study for OCN Certification.

Status: On Track

Start: 07/01/2014

Due: 06/30/2015



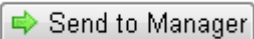
Complete: 0.0%

Results/Notes:

Comments by

Remove Goal

These records can be removed from the PE form.

	The PE form can be saved at any time by clicking on the Save button at the top of the screen.
	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.
	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.

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

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.

2.1

Goal: UKHC
Major Job Responsibility: Quality and Safety for Patient Care
Essential Function: Care plans and their implementation are completed parameters.
Job Standard:
To be determined by supervisor and employee

Weight: 5.0%
Start: 07/01/2014

Rating by
Manager Rating: unrated

Comments:
[spell check...](#) [legal scan...](#)

Rating by
Rating: 2.0 - Meets Expectations
Subjects Comments:
Employee comments here.

06/30/15

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. **NOTE:** You can enter overall comments at the bottom of the PE form instead of commenting on each individual MJR if you wish.

2.9

Goal: UKHC
Major Job Responsibility: Service
Essential Function: Meeting Unit-specific Enterprise Patient Centeredness Goal (Cascade from Leadership Goal)
Job Standard:
To be determined by supervisor and employee

Weight: 5.0%
Start: 07/01/2014

Due: 06/30/2015

In Goal 2.9: Service, the manager will enter a unit-specific goal and result in the Job Standard field. This is the only goal that is required to have information in the Job Standard field.

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

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

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	Rating
Customer Centered	Rating
Growth Oriented	Rating
Quality Driven	Rating
Resource Wise	Rating
Service Focused	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
Rating:

Managers Comments:
[writing assistant...](#) [spell check...](#) [legal scan...](#)

Rating by
Rating: Rating

Subjects Comments:
No comments

The Methods of Evaluation section allows you to document how you gathered information used for the employee's rating and performance feedback. You can select all methods that apply.

Methods of Evaluation

Please select from the following Methods of Evaluation that will be used in evaluating the employee's performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.

- ☐ Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
- ☐ Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
- ☐ Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
- ☐ Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
- ☐ Sampling Statistics - Supervisor evaluates the employee's performance in part based on sample's of the employee's work or statistical data that indicates the employee's level of work of demonstrated competence
- ☐ Project Results - Supervisor evaluates the employee's performance in part based on actual results of projects or assignments the employee has managed or participated in
- ☐ Self Report - Supervisor evaluates the employee's performance in part based on the employee's own evaluation of his/her work

Other

Professional Development/Other Goals

1.1
Professional Development:
My goal this year is to continue to study for OCN Certification.
Status: **Start:** **Due:** **Complete:**
Comments by

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

[spell check...](#) [legal scan...](#)

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

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

Summary

Ratings for each MJR and Behavioral Expectation are listed here. The overall score is calculated through a scale adjusted rating that combines the MJR scores and Behavioral Expectation scores, while accounting for the two different rating scales. Professional Development goal results are not rated. Overall comments on the employee's performance can be entered in this section.

Calculated Form Overall Rating **2.3 / 4.0**

	Rating	Weights
Major Job Responsibilities	2.2 / 4.0	
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	3.0 - Occasionally Exceeds Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Service	2.0 - Meets Expectations	5.0%
Service	3.0 - Occasionally Exceeds Expectations	5.0%
Service	2.0 - Meets Expectations	5.0%
Service	3.0 - Occasionally Exceeds Expectations	5.0%

Overall Comments


Comments by

Save and Close

Close Without Saving

Get Feedback

Send to Employee Signature


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 MJR and Behavioral Expectations ratings. **Please ensure each MJR and Behavioral Expectation has been rated.**

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

Click the **Save and Close** button to save and hold the form while you have the face-to-face meeting with the employee.

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

- Employees cannot view any ratings or comments entered by their manager on the UK Online PE System
- The manager can use the UK 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
- NOTE: No changes can be made to the rating or comments fields once the form is sent to the 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.
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HR Training & Development
As of 04/08/15

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

Completing the PE Process - Step Three: 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 Responsibilities

In this section employees will self-rate and managers will rate the employee's performance of the MJRs. Updates to the job standards can be made in this section. MJR and Essential Function updates cannot be made here - those updates must be made in the Position Description System.

2.1

Goal: UKHC

Major Job Responsibility : Quality and Safety for Patient Care
Essential Function : Care plans and their implementation are completed accurately and within appropriate parameters.

Job Standard : To be determined by supervisor and employee

Weight : 5.0%

Start : 07/01/2014

Due :
06/30/2015

Rating by

Manager Rating: 2.0 - Meets Expectations

Comments:

Manager comments here.

Rating by

Rating: 2.0 - Meets Expectations

Subjects Comments:

Employee comments here.

Methods of Evaluation

Please select from the following Methods of Evaluation that will be used in evaluating the employee's performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.

- ☒ Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
- ☐ Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
- ☐ Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
- ☒ Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
- ☐ Sampling Statistics - Supervisor evaluates the employee's performance in part based on sample's of the employee's work or statistical data that indicates the employee's level of work or demonstrated competence
- ☒ Project Results - Supervisor evaluates the employee's performance in part based on actual results of projects or assignments the employee has managed or participated in
- ☐ Self Report - Supervisor evaluates the employee's performance in part based on the employee's own evaluation of his/her work

Other

Summary

Ratings for each MJR and Behavioral Expectation are listed here. The overall score is calculated through a scale adjusted rating that combines the MJR scores and Behavioral Expectation scores, while accounting for the two different rating scales. Professional Development goal results are not rated. Overall comments on the employee's performance can be entered in this section.

Calculated Form Overall Rating 2.3 / 4.0

	Rating	Weights
Major Job Responsibilities	2.2 / 4.0	
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	3.0 - Occasionally Exceeds Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Quality and Safety for Patient Care	2.0 - Meets Expectations	5.0%
Service	2.0 - Meets Expectations	5.0%
Service	3.0 - Occasionally Exceeds Expectations	5.0%
Service	2.0 - Meets Expectations	5.0%
Service	3.0 - Occasionally Exceeds Expectations	5.0%

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

Completing the PE Process - Step Three: Employee Signature, continued

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

Signature

Sign below

Employee: _____
Nancy Nurse

Manager: _____
Manager Nurse

Section Comments:
Comments by Nancy Nurse:

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

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

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.

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

Completing the PE Process - Step Four: 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.

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

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

My Forms

All Forms

In Progress

Completed

Create New Folder

Un-Filed

Form Status

Items per page: 10

Showing 1–1 of 1

Create New Folder

Display Options

☒ Form Title

☒ Employee

☒ Form Start Date

☒ Form

Form Title

☐ 2014 HC Leadership Performance Evaluation for

☐ 2015 Nursing Performance Evaluation for

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

My Forms

All Forms

In Progress

Completed

Form Status

Aggregate

Individual

- Form Status** section:
Aggregate view

2013 University Performance Evaluation

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

- Form Status** section:
Individual view

2013 University Performance Evaluation

Employee	Employee Self Evaluation	Manager Review	1:1 Meeting	Employee Signature	Manager Signature	Due	Other
	Employee	Manager	Manager	Employee	Manager		
➔ 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

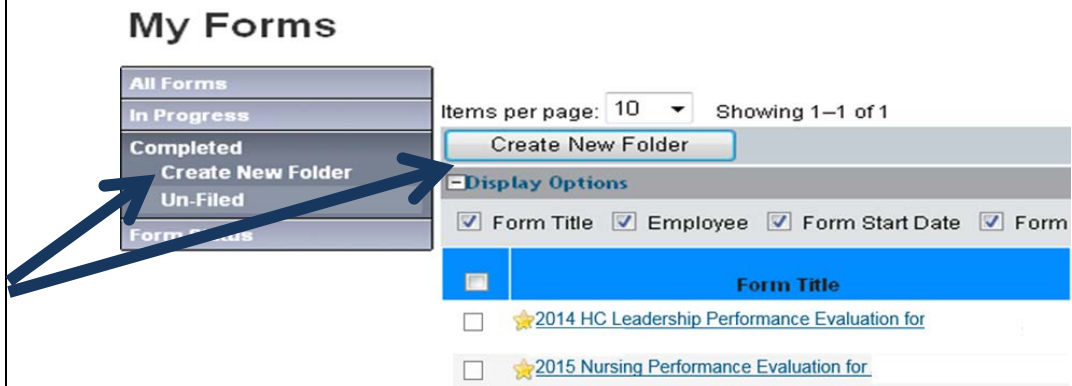
Legend: ✓ Completed 📄 Completed Form ⚠ Requires Your Attention 📄 Enroute

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

Organizing Completed PE Forms

You can create folders to organize completed PE forms. While you are in the **Completed** section,

- Click on either of the **Create New Folder** options.

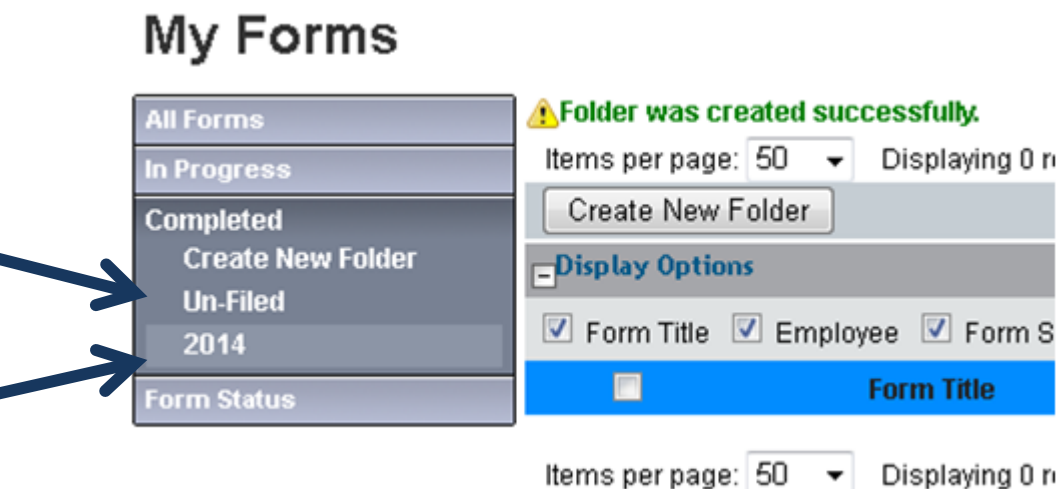


You can name your folders as you wish. Some managers group by year, others group by employee, while others group by area.



When you create a new folder, you will automatically be viewing the folder. To go back to the completed PE forms listing, click on the **Un-filed** link.

To view the contents of a folder, click on the folder link.



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

Moving Completed PE Forms to Folders

To move multiple forms to a folder at the same time,

- Click the **check boxes** next to the forms you wish to move
- Then, select desired folder from the **Move to Folder** drop down
- Then, click the **Move** button

My Forms

The screenshot shows the 'My Forms' interface. On the left, there is a sidebar with a tree view containing 'All Forms', 'In Progress', 'Completed', 'Create New Folder', 'Un-Filed', and '2014'. The main area displays a list of forms with columns for checkboxes, form titles, employee names, and due dates. A 'Move to Folder' dropdown menu is open, showing 'Select Folder', 'Un-Filed', and '2014'. A 'Move' button is visible next to the dropdown. Arrows indicate the workflow: selecting checkboxes, choosing a folder from the dropdown, and clicking the 'Move' button.

You can also move all of the forms at the same time by selecting the top check box and following the steps above.

Forms

The screenshot shows the 'Forms' interface. It features a sidebar with a tree view containing 'ns', 'ress', 'te', 'ate New Folder', 'Filed', '4', and 'tatus'. The main area displays a list of forms with checkboxes, form titles, and employee names. An arrow points to the top checkbox, indicating that selecting it allows for moving all forms at once.