






Annual Performance Review: Alternate Reviewer Process Guide

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|---|---|--|
|  | Why would I need to use this optional process? | |
| | <p>The Alternate Reviewer process is an OPTIONAL function in Talent Connect that allows Managers to collaborate with other leaders to comment and rate team members' performance on the annual Performance Review form.</p> <p>This adds additional steps for leaders in Talent Connect but saves time in collecting feedback on paper or other insecure methods.</p> | |

| | Who can use this process? | Scenario |
|---|---|--|
|  | Leaders who have more than 50 direct reports | A nurse manager with 76 direct reports in Talent Connect can delegate the review forms with a supervisor who works with his 20 nurses on the night shift. (NOTE: A charge nurse cannot be an alternate reviewer.) |
|  | Leaders on leave of absence | A supervisor in Finance is going to be on parental leave during the review season and uses her manager as an alternate reviewer for the reviews for her team of eight to cover while she is out. |
|  | Leaders of transferred employees | A manager's internal transfer hire started in September of the performance year. She wants feedback from their previous manager to ensure the team member gets credit for all their accomplishments. |

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|---|--|--|
|  | Important to know | |
| | <p>NOTE: Alternate reviewers MUST be a people leader. (e.g., a charge nurse is not a people leader)</p> <ul style="list-style-type: none"> • This is not a 360 Feedback Review. This is part of the formal mandatory annual performance review documentation process. • Feedback from both reviewers is seen by the team member in their review. • The Direct Manager can edit the rating provided by the alternate reviewer but cannot edit the comments from the reviewer. • Sharing Talent Connect login credentials poses security risks for our leaders, our team members, and the organization. Do NOT share your personal log in credentials with anyone. • The Manager is responsible to lead and complete the performance review process by the deadline. | |

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How does Alternate Reviewer process work?

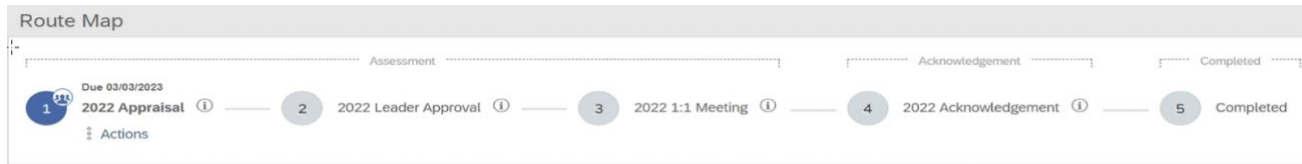
***For specific technical directions with screenshots, go to the [Performance Review User Guide](#).

| Process step | Owner | Important to know |
|--|--------------------|--|
| 1. (Optional) Self-evaluation | Team Member | <ul style="list-style-type: none"> Self-evaluation is optional (Learn more with the self-evaluation guide) Self-evaluations are due by December 31, 2023 |
| 2. Notify Alternate Reviewer | Manager | <ul style="list-style-type: none"> Invite the alternate reviewer and explain their role in the review process Give the alternate reviewer a deadline they need to meet Ensure they know where to find Talent Connect resources for technical help |
| 3. Send to Alternate Reviewer | Manager | <ul style="list-style-type: none"> Gather feedback from the alternate reviewer first Assign reviews to the alternate reviewer in Talent Connect See the Talent Connect Annual Performance Review User Guide |
| 4. Enter comments and ratings | Alternate Reviewer | <ul style="list-style-type: none"> Give thoughtful feedback – all comments will be visible to the team member Rate the employee on their daily work, performance to goals, and commitments When finished, send the form back to the manager using Talent Connect |
| 5. Review, add, and edit comments and ratings | Manager | <ul style="list-style-type: none"> Review comments from the alternate evaluator (you will not be able to edit their comments) Respond to or add any additional comments you want included in the review (optional) Review the suggested ratings for daily work, performance to goals, and commitments. If necessary, edit the ratings suggested by the alternate reviewer Review the final Overall Rating. You can accept the rating or edit the rating The form can be sent back to the Alternate Reviewer for additional collaboration |
| 6. Hold 1:1 Meeting | Manager | <ul style="list-style-type: none"> Hold the 1:1 meeting to share feedback about successes and opportunities If the comments of the Alternate Reviewer and Manager are not aligned, use it as a learning opportunity for the team member |
| 7. Finalize Form | Manager | <ul style="list-style-type: none"> If the 1:1 discussion uncovered edits – make them now This is the last chance to edit comments and ratings in Talent Connect |
| 8. Acknowledgement | Team Member | <ul style="list-style-type: none"> Team Member signs-off on their review electronically in Talent Connect |

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Visibility in Talent Connect

The performance review form is handed off to each role involved with the process like a relay. The Route Map tool in Talent Connect shows what stage of the review process the user is currently in.



The team member, alternate reviewer, and leader have different access to information on the form at various times in the process. The leader has the most visibility. See the chart below for details.

| | Team Member | Alternate Reviewer | Leader |
|--------------------------------------|---|---|--|
| When can they comment? | Appraisal (first) | Appraisal (second) after assigned by the leader | Appraisal (third), Approval, or 1:1 Meeting |
| When do they add ratings? | Team members do not rate themselves, only comment | Appraisal. Ratings can be edited by alternate reviewers which is why we recommend them to complete their review second. | Leaders can edit ratings at appraisal, approval, or 1:1. |
| Whose comments do they see and when? | Team members will see alternate reviewer and leader comments as well as the final rating in their 1:1 meeting stage. | Alternate reviewers will see the employee's comments during their appraisal. | Leaders will see team member's self-appraisal and alternate reviewer's comments and ratings. |
| Do they access the final form? | Yes. The completed form with comments and ratings from the self-review, alternate reviewer, and leader will appear in Talent Connect for the team member, alternate reviewer, and leader. | | |

 For more information on how the performance review process works in general, visit these resources:

[Performance Review Process Guide](#)
[Self-Review Process Guide](#)

[Performance Review User Guide](#)

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