Talent Connect Process Guides for Performance Reviews

Purpose

Use this document to help you navigate the steps for performance reviews in Talent Connect.

For an Interactive Guide allowing you to see guided video and try these steps yourself, visit the <u>Interactive Technical User Guide for Leaders.</u>

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Contents

Access Review Forms in Talent Connect Complete a Self-Appraisal 360 Development Feedback Alternate Review Process Complete Review Forms Set & Cascade Goals



Using Talent Connect for Performance Reviews

Access Review Forms in Talent Connect

Purpose

Use this document to help you navigate the steps to accessing performance management forms in Talent Connect.

Contents

Access Performance Forms in Talent Connect

Access Performance Forms in Talent Connect

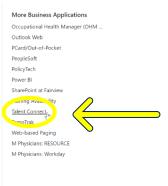
 From the Intranet home page, go to the **Applications** tab.

- 2. Select, "Talent Connect."
- Clinical Applications Childrens Hospital Resource Center Elsevier Skills Epic FICK Calculator Forms on Demand Homecare Web Chart Lab Test Directory (new) Muse Web MyChart OnCore Philips Patient Monitoring Applications UpToDate Vocera Platform Assignments Vocera Web Console

Fairview

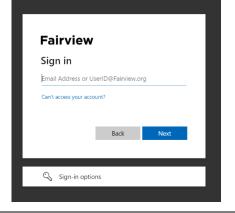
Business Applications Amcom SmartWeb Career Connection Collibra Compass: Safety Reporting ControlCheck E-time (archive) Engage Code Paging Enterprise Report Viewer (e-time/staff... Enterprise Report Viewer (ERV) EZCall Fairview Alert Admin (Everbridge) iCIMS Manager Portal iManage for Legal IT Hub Lawson HR Self-Service Learning Management System (LMS) MyTime MyTime Clinical Scheduling Extensions

Business Services 🗸 Resources 🗸 Apps 🗸 Learning & Development 🗸



3. Sign in, if required.

If you are logged into your computer, it will automatically sign in. If you need to log in, enter your Fairview email and password. Both are case sensitive.

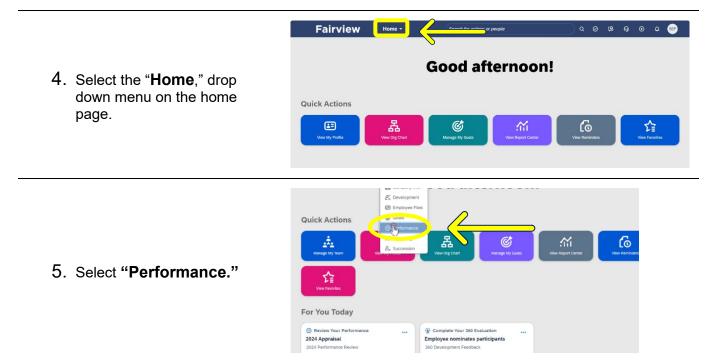


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ORGANIZATIONAL DEVELOPMENT & LEARNING

Using Talent Connect for Performance Reviews



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Complete a Self-Appraisal

Purpose

Use this document to help you fill out a self-appraisal form.

Contents

Access Your Self-Appraisal in Talent Connect

Enter Comments in the Self-Appraisal

Use the Writing Assistant in the Self-Appraisal Form

Save and Close the Self-Appraisal Form

Access Your Self-Appraisal in Talent Connect

1. From the Intranet home page, go to the **Applications** tab.

2. Select, "Talent Connect."

FICK Calculator
Forms on Demand
Homecare Web Chart
Lab Test Directory (new)
Muse Web
MyChart
OnCore
Philips Patient Monitoring Applications
UpToDate
Vocera Platform Assignments
Vocera Web Console

Fairview

Elsevier Skills

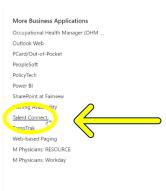
Epic

Clinical Applications

Childrens Hospital Resource Center

Business Applications Amcom SmartWeb Career Connection Collibra Compass: Safety Reporting ControlCheck E-time (archive) Engage Code Paging Enterprise Report Viewer (e-time/staff... Enterprise Report Viewer (ERV) EZCall Fairview Alert Admin (Everbridge) iCIMS Manager Portal iManage for Legal IT Hub Lawson HR Self-Service Learning Management System (LMS) MyTime MyTime Clinical Scheduling Extensions

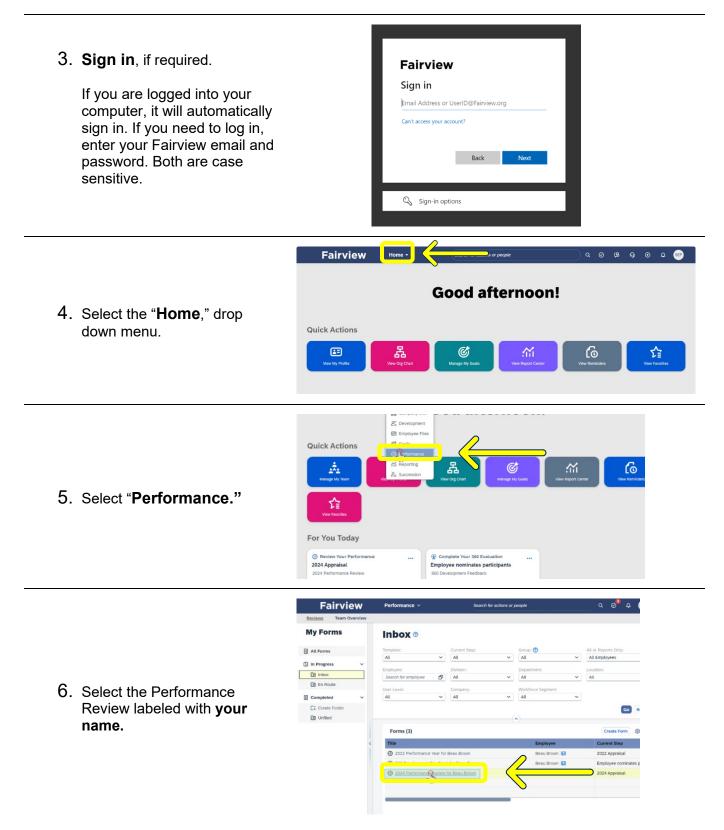
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Using Talent Connect for Performance Reviews



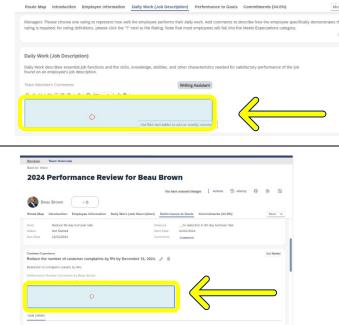
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Enter Comments in the Self-Appraisal

1. Enter comments about your Daily Work, Performance to Goals, and application of the Fairview Commitments in the text boxes

2. You will respond to each goal separately.



More 🗸

2024 Performance Review for Beau Brown

Beau Brown 🗸 🗸 🗸

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Using Talent Connect for Performance Reviews

Use the Writing Assistant in the Self-Appraisal

The Writing Assistant can add pre-written comments in the Daily Work and Commitments sections of your self-appraisal.

2024 Periormance Review for Deau Brown 🕲 History 🕞 e 6 Beau Brown v 0 Introduction Employee Info 1. Select the, "Writing rk (Job Description) Assistant," button above Vork describes essential job fu on an employee's job descript the comment box. Writing Assis / ⊻ | ⊨ ≡ ⊒ ⊒ | ⊘ | ⊘ § 1 2. Choose the name you would like used for the statements the Writing Assistant generates. Find a quote about (B Daily Work (Job Description) Daily Work describes essential job atisfactory performance of the job 3. Select a topic you wish to ct topics be comment on from the column related to your work around the topic: Improve, Meets (Expectations), or Exceeds (Expectations). 🖲 I 🔿 Beau

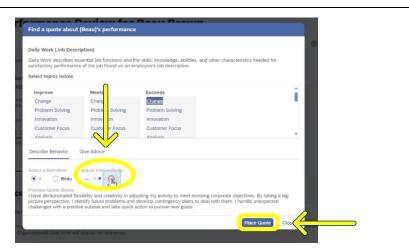
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Find a quote about (F

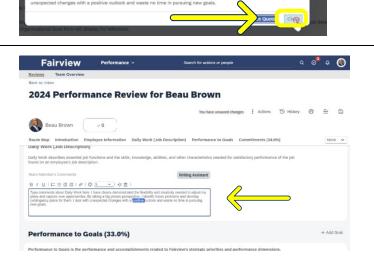
ribes es

- 4. Adjust the positivity, if desired, by selecting the plus or minus icons.
- 5. Click, "Place Quote."



6. Select "**Close**," at the bottom of the screen.

7. Review and **edit** the statement.



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Save and Close the Self-Appraisal Form

<text>

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Using Talent Connect for Performance Reviews

360 Development Feedback

Purpose

Use this document to help you create, work with, and access 360 Development Feedback Forms in Talent Connect.

Contents

Create a 360 Development Feedback Form (Leader)

Nominate Participants to Provide 360 Feedback (Team Member)

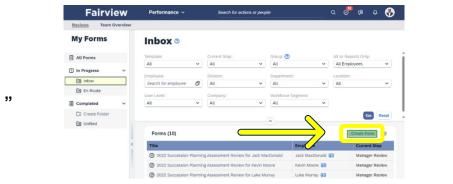
Approve Participants for 360 Feedback (Leader)

Provide Feedback for 360 Development Feedback (All)

View Completed 360 Feedback (Leader)

Create a 360 Development Feedback Form (Leader)





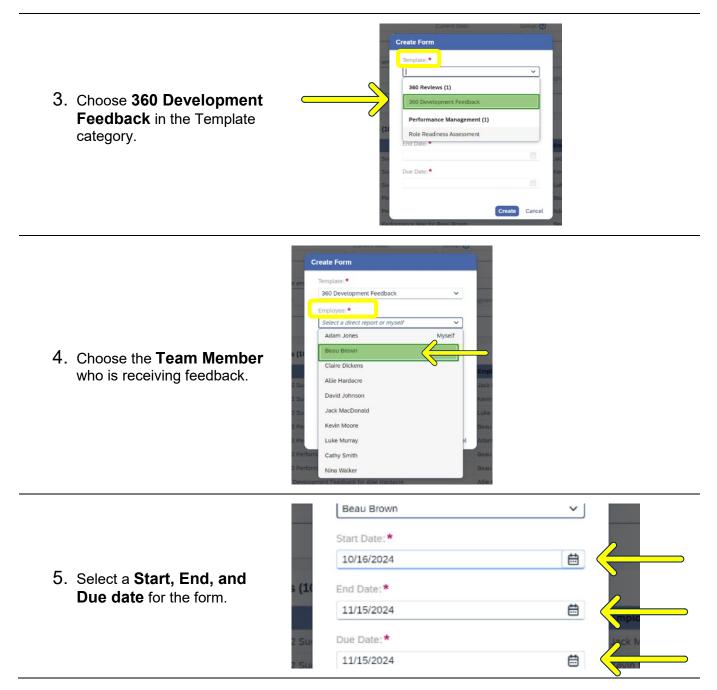
2. Select "Create Form."

and selecting "Performance."

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Using Talent Connect for Performance Reviews



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Using Talent Connect for Performance Reviews

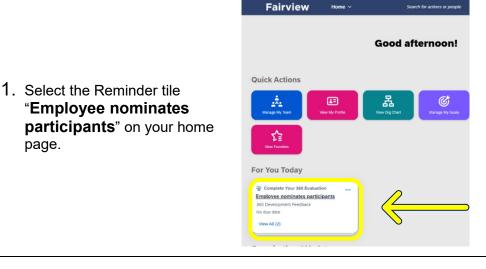
Create Form nplate:* 360 Development Feedback Employee:* Beau Brown v Start Date: * 10/16/2024 End Date:* 11/15/2024 Due Date:* 11/15/2024 Ē ated, the form will be sent to Beau When creating

Special Note

6. Select "Create."

When you create the 360 Development form, it will be sent to the Team Member to nominate participants to give feedback.

Nominate Participants to Provide Feedback (Team Member)



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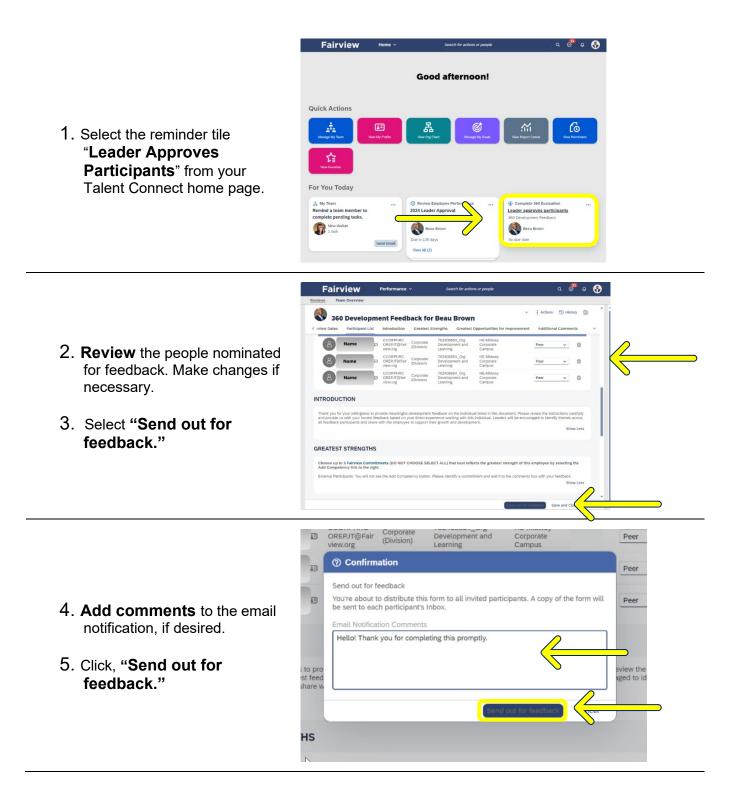
Fairview a 🎭 e e 🌒 Performance > 🚯 360 Development Feedback for Beau Brown ew Dates Participant List Introdu o add participants for 360 De ake changes to the selected feedback part 2. Click "Add Participants," above the "Raters" bar. INTRODUCTION GREATEST STRENGTHS Add Participants 0 Enter a user's name Selected Participants Туре 3. Enter a **user's name**. Add to List Cancel Selected Participants Employee Туре Emai Internal CCORPHRCO fil 4. Select the **relationship** you Department : 702408654 Org Development and Learning have to the person you're Location : HE-Midway Corporate Campus Leader : Sarah J Ward nominating to give feedback. Add to List Cancel Department : 702408654_Org Development and Learning Location : HE-Midway Corporate Campus Leader : Sarah J Ward 5. Click "Add to List" at the bottom of the pop-up. 6. Repeat for each participant.

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Using Talent Connect for Performance Reviews

Approve Participants to Provide 360 Feedback (Leader)



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Using Talent Connect for Performance Reviews

Provide 360 Development Feedback (All)

Fairview ood afternoon! Quick Actions 1. Go to your Performance 옯 : 6 Inbox by selecting the "Home" drop down 슙 menu and selecting "Performance." For You Today Employee no nates particip Organizational Updates Reviews My Forms Inbox 🛛 All Forms In Progress 🗈 Inbox En Rout 2. Select the 360 Form E Completed C o Go Reset you wish to complete. D Unfiled Forms (1) INTERS + Add GREATEST STRENGTHS Choose up to 3 Fairview Com Competency link to the right. 3. Select the "Add" 6 al Participants: You will not button to choose Sho Commitments that are strengths for the person Section Comments: nents by Sarah Elizat you are giving feedback B t ⊻ 5 ≣ × ✓ 12 pt ✓ ▲I × □I × Ⅲ Ⅲ Ⅲ ∞ ⊗ ⊗ n, for.

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Using Talent Connect for Performance Reviews

All By Role

4. Select "Fairview Commitments."



Add Compe

Select All

Achieve Result

Collaborate for Outcome

Communicate Intentionally

Engage and Inspire

Pursue Mastery
Set and Hold Standa

Embrace Diversity and Pra

- 5. Choose three Commitments that are strengths for the person receiving feedback.
 - a. Do not select "Select All."
 - b. <u>You can see the</u> <u>Fairview</u> <u>Commitments</u> <u>here.</u>
- 6. Select "Add."
- 7. Add comments about the strengths of the person receiving feedback.
- 8. Repeat the process for Areas of Opportunity for the person receiving feedback.
 - a. You will not be able to select the same Commitments as strengths and opportunities.

iews	Team Overv		ixecutive Review								
3		elonme	nt Foodha	ck for Bea	u Brown			~	Actions	1 History	0.0
	nformation	Review Dates	Introduction	Greatest Stree		est Opportunitie	the last		A della an	Changes al Comments	
toyee in	normation	Review Dates	introduction	Greatest Stree	iguis Great	est Opportuniti	es for improv	rement	Addition	at comments	
et and	Hold Standa	rds 🗇									
l set sta	andards for my v	vork that align v	vith my team and t	he organization whi	le holding mysel	f and others acco	untable.				
ngage	and Inspire	0									
I see ha	ow my purpose	connects to the	vision and values	of the organization a	and apply my ski	lisets to take acti	on and inspire	e others.			
ollabo	rate for Outc	omes 🗊									
l recog	nize we are bett	er together and	collaborate to sha	re goals, knowledge	, and expertise t	o drive successfu	ul outcomes.				
Sectio	on Comments										
Comme	ents by Sarah El	izabeth Plumb*									
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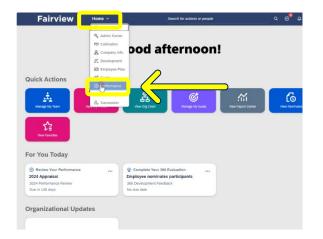
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View Completed 360 Development Feedback (Leader)

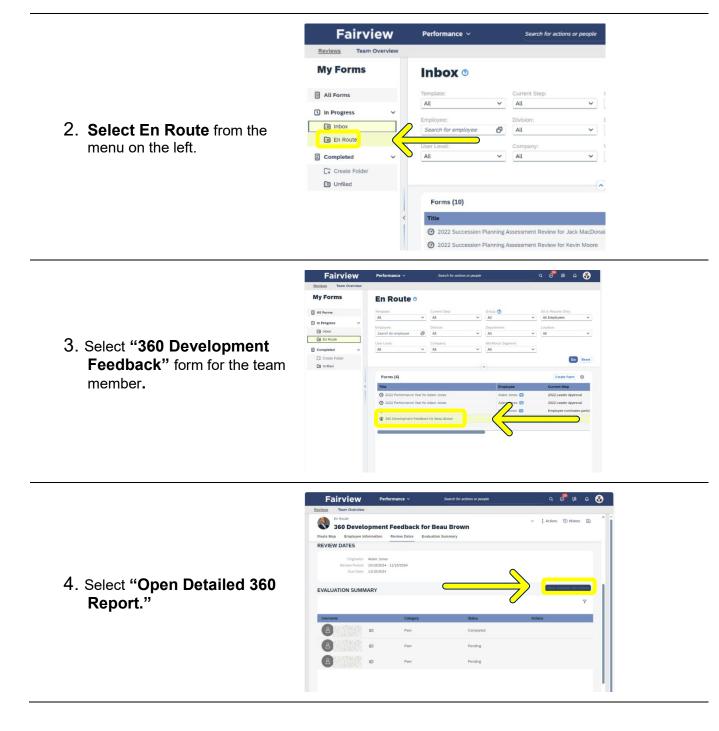
1. Go to your Performance Inbox by selecting the "**Home**" drop down menu and selecting "**Performance**."



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Alternate Reviewer

Purpose

Use this document to help you work with an Alternate Reviewer in Talent Connect.

Contents

Send a Review Form to an Alternate Reviewer

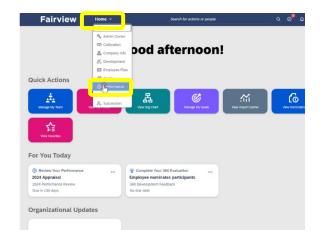
Complete a Review Form as an Alternate Reviewer

Use the Writing Assistant

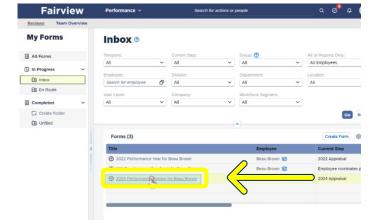
Complete a Review Form After an Alternate Reviewer

Send a Review Form to an Alternate Reviewer

 Go to your Performance Inbox by selecting the "Home" drop down menu and selecting "Performance."



- 2. Select the Performance Review labeled with **the name of the individual** you will send to the Alternate Reviewer.
 - Make sure you are selecting the review form for the **correct** year.



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Return to Alternate Reviewer Return to Main Table of Contents

ORGANIZATIONAL DEVELOPMENT & LEARNING

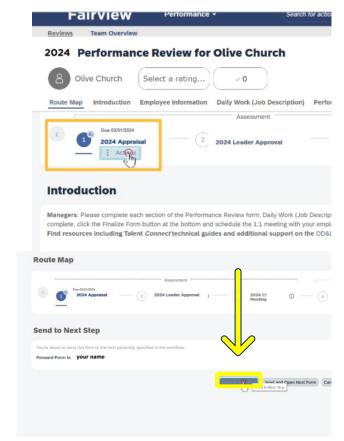
Using Talent Connect for Performance Reviews

3. Move the **review form to the second step**, if required, in the Route Map.

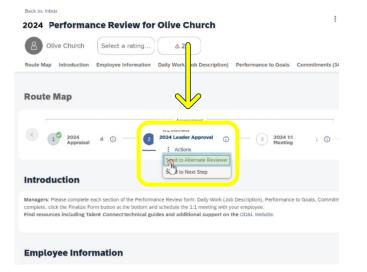
> **NOTE: Do not move the form until the team member has completed their optional self-

appraisal, if they are going to complete this. The team member can not add to, edit, or complete the self-appraisal after you move the form to the second step.

- Select the "Actions" button under the highlighted first step.
- b. Select "Send to Next Step."
- c. The warning message will say, "Forward Form to…" your name. Select **"Send to Next Step."**



- Click the "Actions," button under the second step in the Route Map.
- 5. Select "Send to Alternate Reviewer."



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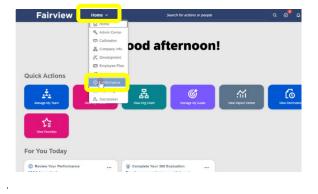
2 Select _____ 3 Confirm Search by Filtering Search by Name 6. Enter the Name of the All Employees All Divisions Alternate Reviewer in the All Departments search box. All Locations All Groups h by Filtering All User Level ~ Send to Alt - 3 Confirm 2 Select Search by Filtering Search by Nam Adam Jones, TEAM LEA All Employee 7. Click the "Select" button. All Division All De All Locations All Groups a All User Leve Search 3 Confirm 8. Select "Send" button to about to send this form to Adam Jones to ask for edits send the form and return to your inbox or **"Send and Open Next Form**" to select another form to send. Back

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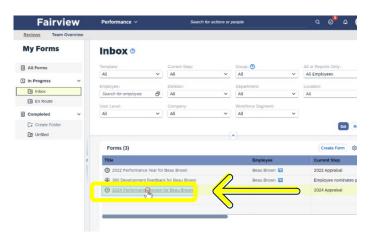


Complete a Review as an Alternate Reviewer

1. Go to your Performance Inbox by selecting the "**Home**" drop down menu and selecting "**Performance**."



- 2. Select the Performance Review labeled with **the name of the individual** you will complete.
- 3. Make sure you are selecting the review form for the **correct year**.



4. Use the drop down menu to **select a rating** for each section: Daily Work, Performance to Goals, and Fairview Commitments.

ton	nce Review for	Beau Brown				Actions	History	é
Beau Brown	Select a rating	~ 0						
oute Map Introduction	Employee Information	Daily Work (Job Description)	Performance to Goals	Commitments (34.0%)	Respect for People	Continuous Improv	rement	
aily Work describes essentia escription.	I job functions and the skills	, knowledge, abilities, and other	characteristics needed for sa	isfactory performance of t	he job found on an emplo	yee's job		
	/	2			Ratings from Other			
Select a rating		/			There are no Ratin	gs from Others.		
	- Pm		(Malifice	Assistant				
	P Q 500 - 4 8	<u>></u>	11124	Passes a				
1 2 11- 3 2 2 1		-						
erformance to	Goals (33.0%)							
			s strategic priorities and pe	formance dimensions.				
erformance to Goals is the	performance and accomp	plishments related to Fairview'						
erformance to Goals is the lanagers: A rating is required	performance and accomp				pory. Any goal details that	were captured on th	e 2024 Organi	zati
erformance to Goals is the lanagers: A rating is required	performance and accomp	plishments related to Fairview'			pry. Any goal details that	were captured on th	e 2024 Organi	zat
erformance to Goals is the lanagers: A rating is required	performance and accomp	plishments related to Fairview'			pory. Any goal details that	: were captured on th	e 2024 Organi	zati
Performance to Goals is the Anagers: A rating is required all display for reference.	e performance and accomp	plishments related to Fairview'			pry. Any goal details that	: were captured on th	e 2024 Organi	zati
Performance to Goals is the Annagers: A rating is required all display for reference. elect One Reduce 90-day turnover	performance and accomp to rating definitions, please rate	plishments related to Fairview'			pory. Any goal details that	were captured on th	e 2024 Organi	zet
Performance to Goals is the Annagers: A rating is required all display for reference. elect One Reduce 90-day turnover	performance and accomp to rating definitions, please rate	plishments related to Fairview'			pry. Any goal details that	were captured on th	ie 2024 Organi	zet
	performance and accomp to rating definitions, please rate	plishments related to Fairview'			pry. Any goal details the Ratings from Other There are no Ratin	5	ie 2024 Organi	zat

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Using Talent Connect for Performance Reviews

Fairview Per

Beau Brown Select a rating...

2024 Performance Review for Beau Bro

- 0

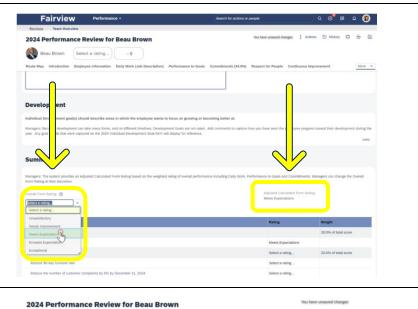
- 5. Add comments in the text box in each section to support the chosen rating.
 - a. The team member will see these comments.
- 6. Repeat this process for each section.
- Nate Way
 Interaction
 Employment Handling
 Buildy Work (Jukh Description)
 Performance to dash C commitments (Jukh)
 Respect for Proping
 Confinitionion improvement
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 Display
 Display

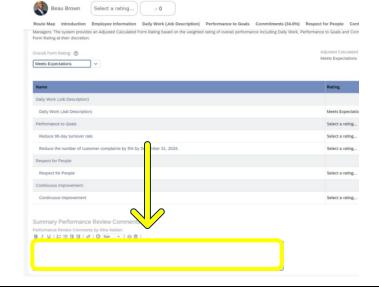
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7. In the Summary section, select an "Overall Rating."

> Talent Connect automatically computes the rating in the Adjusted Calculated Form Rating from your entries on the form. This is informational and is only visible to leaders. You can use this as a basis for your overall rating or adjust, as desired.

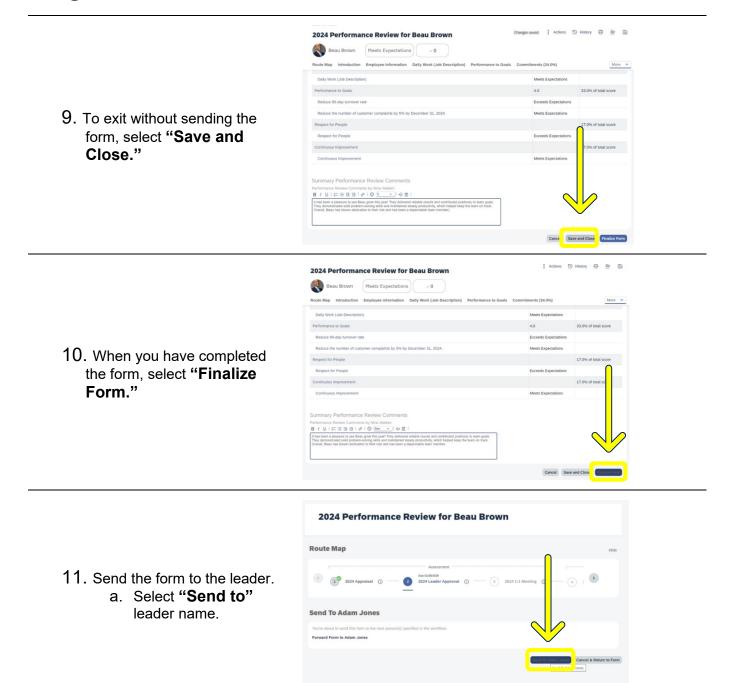






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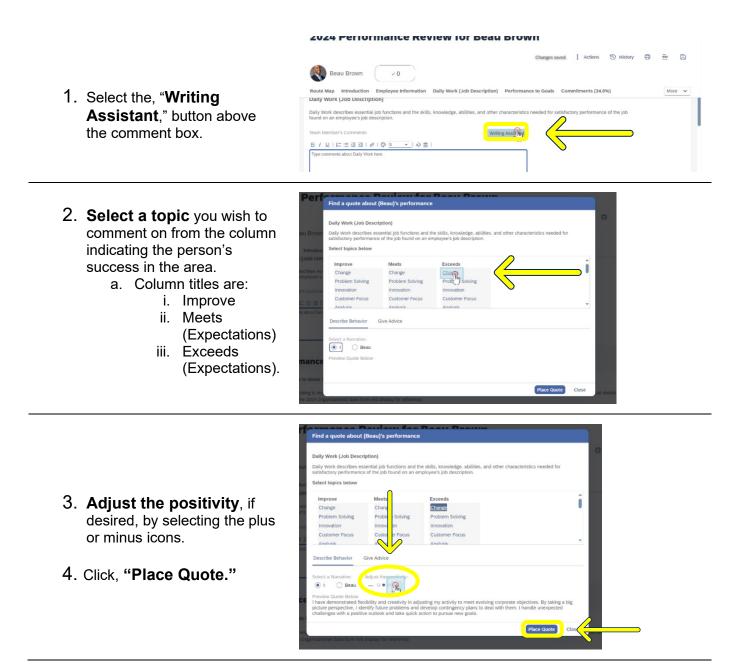




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Use the Writing Assistant in a Review Form



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Find a g te about (Beau)'s ork (Job Description) ork describes essential job functions and the skills, knowle elect topics below Î 5. Select "Close," at the bottom of the screen. - 000 + 🔿 Beau CIO Fairview م 🕙 م 🔇 2024 Performance Review for Beau Brown hanges : Act ons 🕲 History \varTheta 🖻 🖻 Beau Brown 🗸 O More 🗸 6. Review and **edit** the ity Work (Job Description) Work describes essential job fun I on an employee's job descriptic statement. Writing Assistant 1 旦| に三己己| タ| Q 5 -) 収金| Performance to Goals (33.0%) + Add Goal

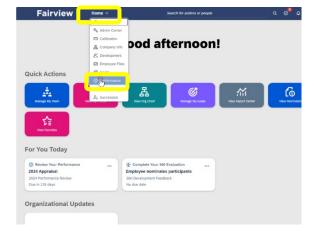
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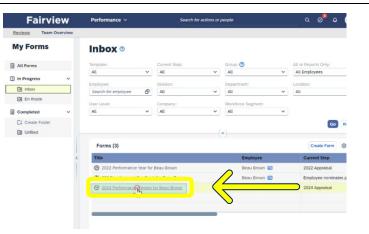
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Complete a Review After an Alternate Reviewer

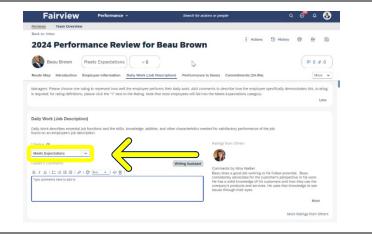
1. Go to your Performance Inbox by selecting the "**Home**" drop down menu and selecting "**Performance**."



- 2. Select the Performance Review labeled with **the name of the individual** you will complete.
- 3. Make sure you are selecting the review form for the **correct year**.



- 4. **Review the Ratings** given by the Alternate Reviewer for Daily Work, Performance to Goals, and Fairview Commitments.
- 5. Adjust the ratings if necessary.



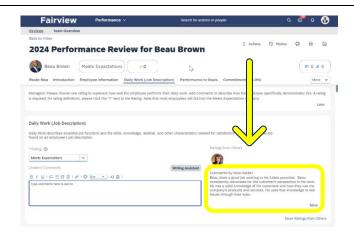
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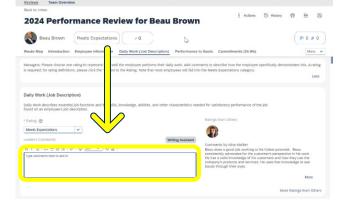
Using Talent Connect for Performance Reviews

Fairview

6. **Review the comments** written by the Alternate Reviewer in all three sections.

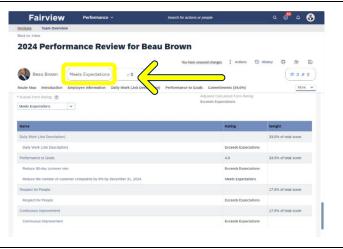


- 7. Write your own **comments** in the text box for each section.
 - a. Respond or add to the Alternate Reviewer's comments as appropriate.
 - b. If there is a difference of opinion, use it as an opportunity for discussion.



8

8. Review and edit, if desired, the **Overall Rating** for the team member.

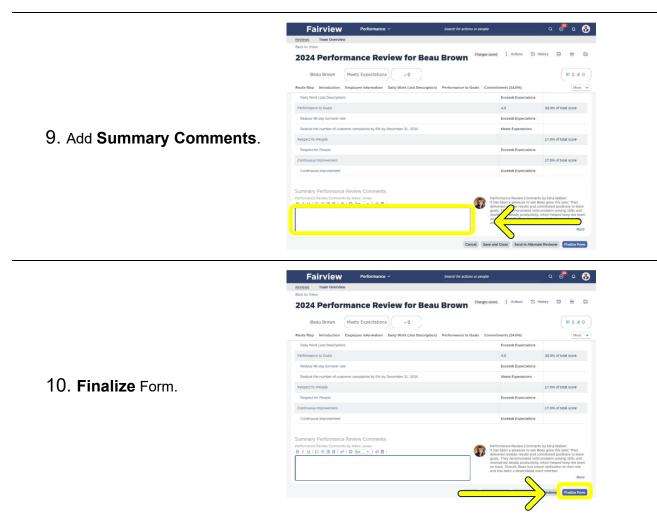


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Using Talent Connect for Performance Reviews



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Completing the Review Form

Purpose

Use this document to help you navigate the steps to entering goals in Talent Connect and for leaders to cascade goals to their direct reports.

Contents

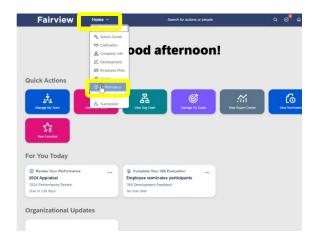
Complete Review Forms in Talent Connect

Use the Writing Assistant in a Review

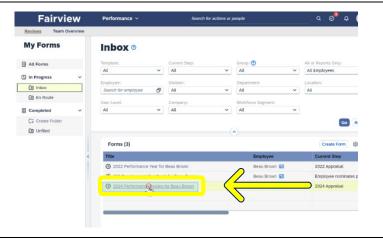
After the 1:1 Meeting

Complete Review Forms in Talent Connect

 Go to your Performance Inbox by selecting the "Home" drop down menu and selecting "Performance."



- 2. Select the Performance Review labeled with the name of the individual you will complete.
- 3. Make sure you are selecting the review form for the **correct year**.



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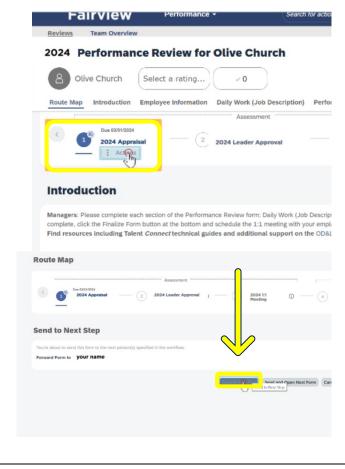
Using Talent Connect for Performance Reviews

4. Move the **review form to the second step**, if required, in the Route Map.

> **NOTE: **Do not move the** form until the team member has completed their optional selfappraisal, if they are going to complete this. The team member can not add to edit

member can not add to, edit, or complete the self-appraisal after you move the form to the second step.

- a. Select the "Actions" button under the highlighted first step.
- b. Select "Send to Next Step."
- c. The warning message will say, "Forward Form to..." your name. Select **"Send to Next Step."**
- 5. Use the drop down menu to **select a rating** for each section: Daily Work, Performance to Goals, and Fairview Commitments.



2024 Performant	ce Review for	Beau Brown				Actions S History	é
Beau Brown	Select a rating	~ 0					
Route Map Introduction I	Employee Information	Daily Work (Job Description)	Performance to Goals	Commitments (34.0%)	Respect for People	Continuous Improvement	
Daily Work describes essential jo description.	ob functions and the skills	, knowledge, abilities, and other c	characteristics needed for sa	tisfactory performance of th	he job found on an emp	loyee's job	
		\wedge			Ratings from Oth	ers	
Select a rating		/			There are no Rat	ings from Others.	
	<u>a</u>	<u> </u>		Assistant			
			Whitey	(Assistant			
BIUIDEE	Q 528 · 42	$\mathbf{\vee}$					
Performance to 0	Goals (33.0%)	i i					
		vishments related to Fairview's	strategic priorities and pe	rformance dimensions.			
Managers: A rating is required; fo	erformance and accomp	uishments related to Fairview's			tory. Any goal details th	at were captured on the 2024 Orga	nizati
Performance to Goals is the pa	erformance and accomp	uishments related to Fairview's			tory. Any goal details th	at were captured on the 2024 Orga	nizati
Performance to Goals is the pa	erformance and accomp	uishments related to Fairview's			tory. Any goal details th	at were captured on the 2024 Orga	nizati
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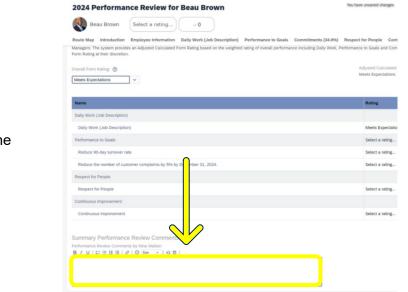
Using Talent Connect for Performance Reviews

- 6. Add comments in the text box in each section to support the chosen rating.
 - a. The team member will see these comments.
- 7. Repeat this process for each section.

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- 8. In the Summary section, select an "Overall Rating."
- 9. Talent Connect automatically computes the rating in the Adjusted Calculated Form Rating from your entries on the form. This is informational and is only visible to leaders. You can use this as a basis for your overall rating or adjust, as desired.

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10. Add comments to the Summary section.

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Return to Completing the Review Return to Main Table of Contents

ORGANIZATIONAL DEVELOPMENT & LEARNING

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Use the Writing Assistant in a Review

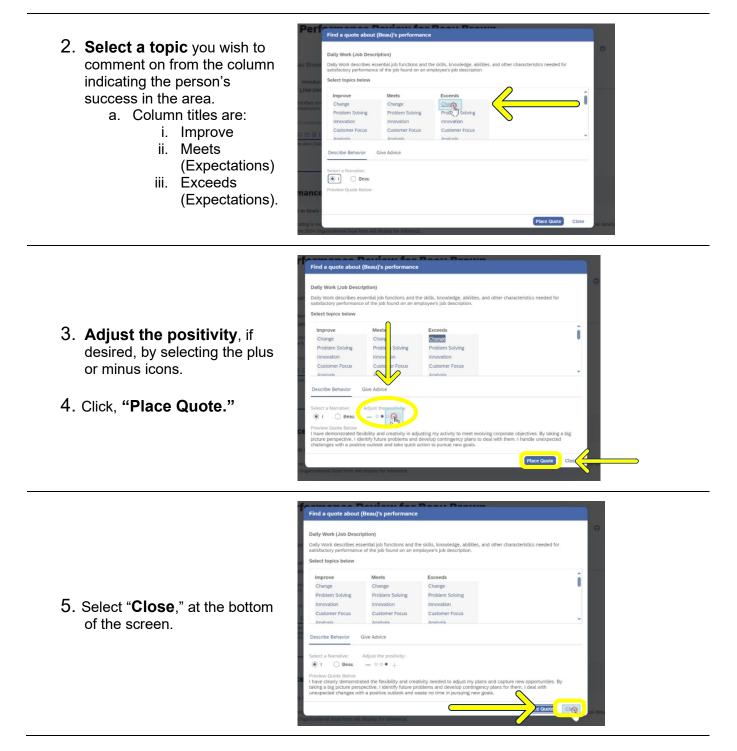
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Using Talent Connect for Performance Reviews



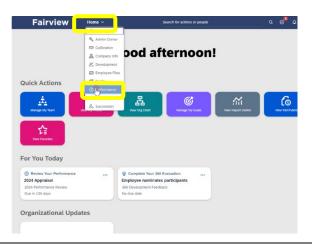
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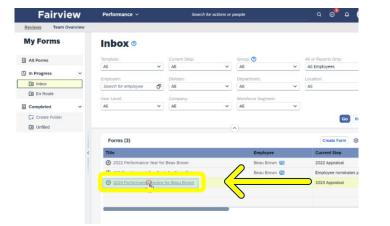
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	Performance to Goals is the performance and accomplishing	ents related to Fairview's strategic priorities and performance dimensions.	

After the 1:1 Meeting

 Go to your Performance Inbox by selecting the "Home" drop down menu and selecting "Performance."



- 2. Select the Performance Review labeled with **the name of the individual** you will complete.
- 3. Make sure you are selecting the review form for the **correct year**.

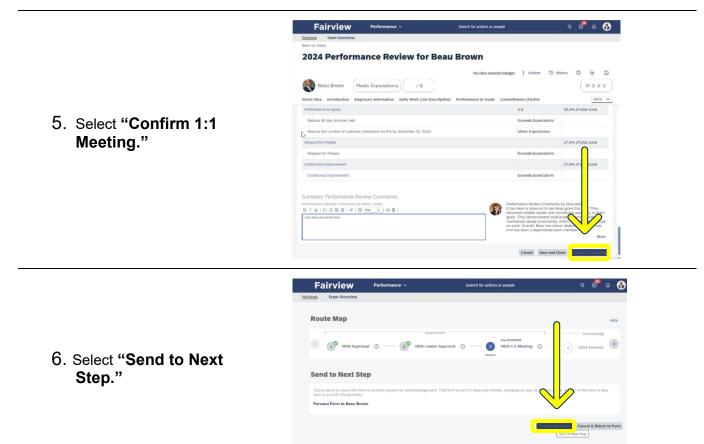


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Using Talent Connect for Performance Reviews

4. Make any needed edits to the form.



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Entering & Cascading Goals

Purpose

Use this document to help you navigate the steps to entering goals in Talent Connect and for leaders to cascade goals to their direct reports.

Contents

Access Goal Forms in Talent Connect

Set Organizational or Individual Development Goals

For Leaders: Cascade Goals

Additional Resources

Access Goal Forms in Talent Connect



1. From the Intranet home page, go to the **Applications** tab.

2. Select, "Talent Connect."

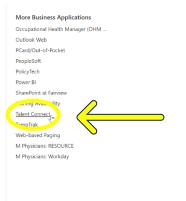
Watch a 30-second video showing you how to <u>Access Goal Forms in</u> <u>Talent *Connect*</u>.

Clinical Applications Childrens Hospital Resource Center Elsevier Skills Epic FiCK Calculator Forms on Demand Homecare Web Chart Lab Test Directory (new) Muse Web MyChart OnCore Philips Patient Monitoring Applications UpToDate Vocera Plaform Assignments Vocera Web Console

Fairview

Business Applications Amcom SmartWeb Career Connection Collibra Compass: Safety Reporting ControlCheck E-time (archive) Engage Code Paging Enterprise Report Viewer (e-time/staff... Enterprise Report Viewer (ERV) EZCall Fairview Alert Admin (Everbridge) iCIMS Manager Portal iManage for Legal IT Hub Lawson HR Self-Service Learning Management System (LMS) MyTim MyTime Clinical Scheduling Extensions

Apps 🗸



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Using Talent Connect for Performance Reviews

3. Sign in, if required.

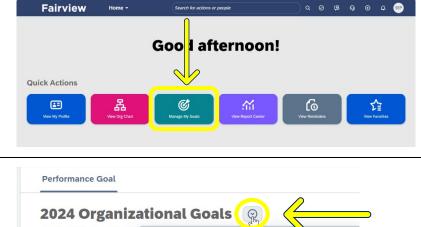
If you are logged into your computer, it will automatically sign in. If you need to log in, enter your Fairview email and password. Both are case sensitive.



Home

4. Click the "Manage My Goals," tile on the home page.

5. Use the **expander arrow** next to the title to select Organizational Goals or Individual Development Goals.





Special Note

Some people may have an additional tab at the top of their page under the blue banner labeled "Development Goal." This tab does not have a function and will bring you to an error message. Unfortunately, it cannot be removed.

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Using Talent Connect for Performance Reviews

Set Organizational or Individual Goals



Watch a 45-second video showing you how to <u>Set Organizational and</u> <u>Individual Development Goals.</u>

Performance Goal

- Select, either
 "Organizational Goals," or "Individual Development Goal," using the expander arrow next to the title on your Goals page.
 - a. Double check that you select the correct year.
- 2. Click, "**Create Goal,**" at the top of the page.





3. Select how you'd like to create your goal. You can create your own goal from scratch, copy a goal from a previous goal plan, or browse from a library of goals.

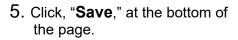
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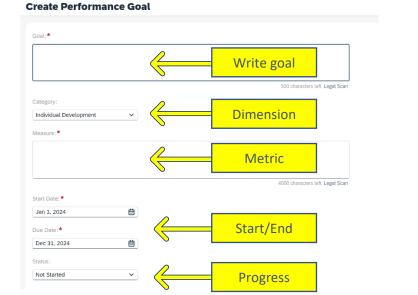
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Using Talent Connect for Performance Reviews

- 4. Enter your goal.
 - a. Write your **goal**.
 - b. Identify which performance dimension your goal matches.
 - c. Set a **measurement metric**.
 - d. Determine start and end dates.
 - e. Set a progress status.
 - f. Add **Comments** or **Milestones** if you choose.







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For Leaders: Cascade Goals to your Team



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Using Talent Connect for Performance Reviews

Cascade Goal Bedit Goals 1 Select Goals 2 Select Recipie 3. Edit Goals teduce 90-day turnover rate 5. Edit the goal, if desired, by selecting the Pencil tool in the box next to the goal. 6. Click, "Next." 7. Click, "Cascade," at the 4. Cascade bottom of the screen. Goals (1 Selected) ecipients (9 Selected) Allie Hardacre TEAM LEADER Beau Brown TEAM LEADER Cathy Smith TEAM LEADER

Additional Resources

Create a Goal from Library

Talent *Connect* offers a list of goals by department that are pre-populated in the system. These are generic thought starter goals to help you come up with goal ideas. This option is available when you create your goal.

Copy From Other Goal Plan

Talent *Connect* offers a list of other goal plans – both prior organizational goals and your own individual goals from previous years. These goals can help you come up with the goal ideas for the current year. This option is available when you create your goal.

For More Information

For more information about Talent *Connect* visit Organizational Development & Learning at <u>https://odandl.org/performance-management</u>.

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