

# TALENT *CONNECT*

## LEADER RESOURCE GUIDE

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### Purpose

The Talent *Connect* Leader Resource Guide walks leaders through accessing Talent Connect, entering and cascading goals, and completing performance reviews for employees.

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### Logging into Talent Connect

If you are logged into the system, you should automatically be authenticated in Talent *Connect*. However, if you are not, follow these steps to log in.

1. Access Talent *Connect* via the Intranet under **Applications**.



2. Select your account.



3. Enter your password and click **Sign in**.



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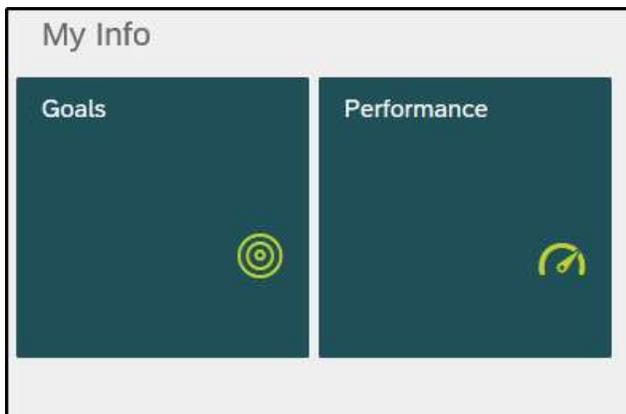
### How to Enter and Cascade Goals

Please follow the instructions below to enter your Goals into Talent *Connect*.

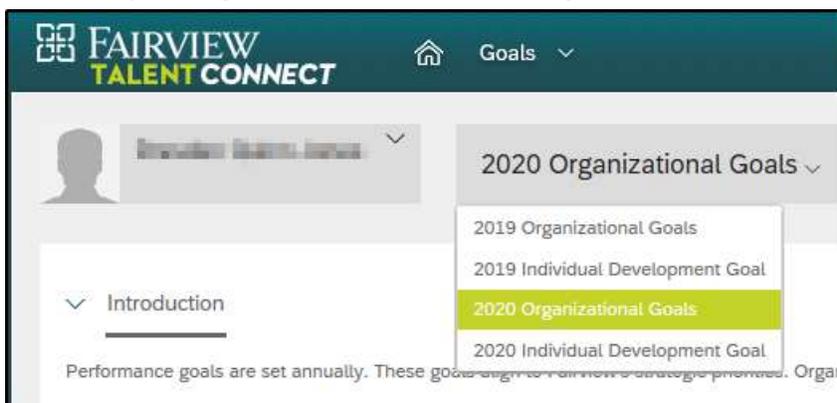
1. Access Talent *Connect* via the Intranet under **Applications**.



2. Log in if prompted.
3. Click the **Goals** tile on the home page.



4. Start with your **Organizational Goals**. Select **Organizational Goals** for the appropriate year from the drop down.



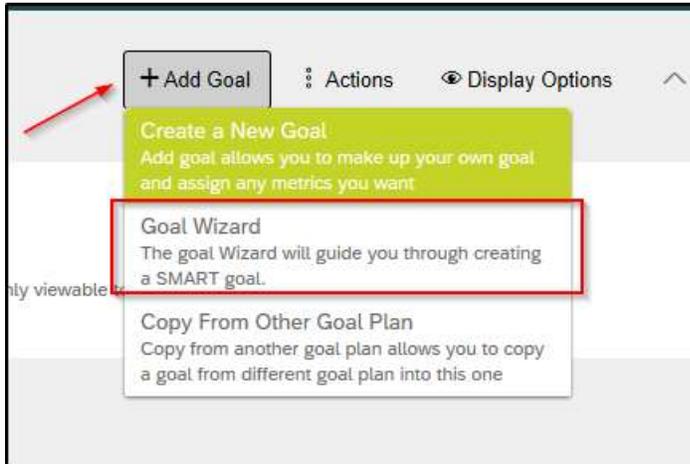
**Note:** All employees must have at least ONE organizational goal. Organizational Goals are viewable by everyone in the organization.

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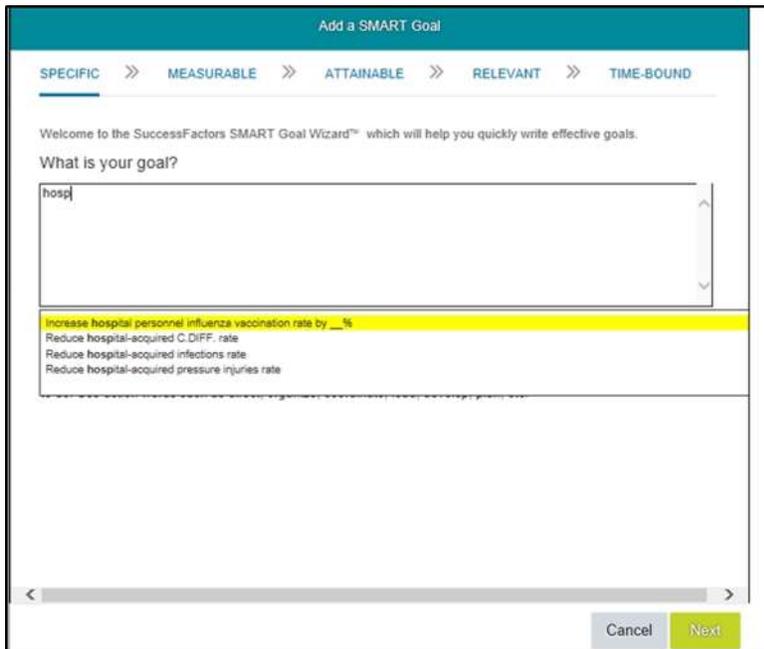
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5. Click **Add Goal** at the top right of the form and choose **Goal Wizard** from the dropdown.



6. A new window will open. In the **What is Your Goal?** text box, you can start by typing a key word. A list of potential goals will pop up. You may choose one of the pre-loaded goals or write a new goal.



7. Click **Next** once your goal is entered.

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8. Now you will choose how you will measure this goal. If you selected a pre-loaded goal, a measurement may be suggested. You can accept this or change it.

**Add a SMART Goal**

SPECIFIC    **MEASURABLE**    ATTAINABLE    RELEVANT    TIME-BOUND

Goal: Reduce hospital-acquired infections rate

How will you measure this goal?

Reduce hospital-acquired infections rate by \_\_\_

Tips: If you can't measure it, you can't manage it. Choose goals with measurable progress and establish concrete criteria for measuring the success of your goal.

Cancel    Back    **Next**

9. Click **Next** once your measurement is entered.
10. Is this goal attainable? Choose **Yes**. Choosing **No** means you cannot move forward because your goal should be attainable. Click **Next**.

**Add a SMART Goal**

SPECIFIC    MEASURABLE    **ATTAINABLE**    RELEVANT    TIME-BOUND

Goal: Reduce hospital-acquired infections rate

Measure: Reduce hospital-acquired infections rate by \_\_\_

Is this goal attainable?

No     Yes

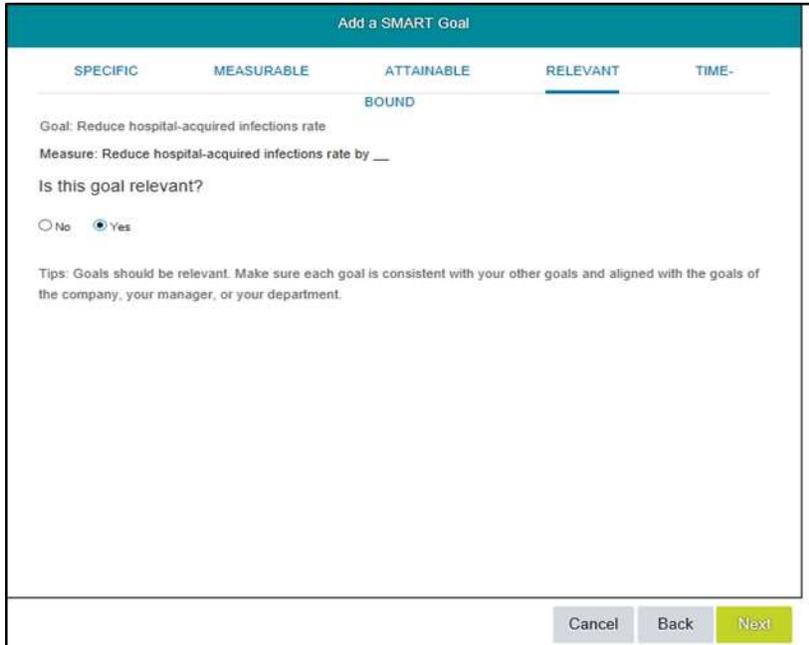
Tips: Goals must be within your capacity to reach. If goals are set too far out of your reach, you cannot commit to accomplishing them. Goals need to stretch you slightly so you feel you can do it and it will need a real commitment from you. Success in reaching attainable goals keeps you motivated.

Cancel    Back    **Next**

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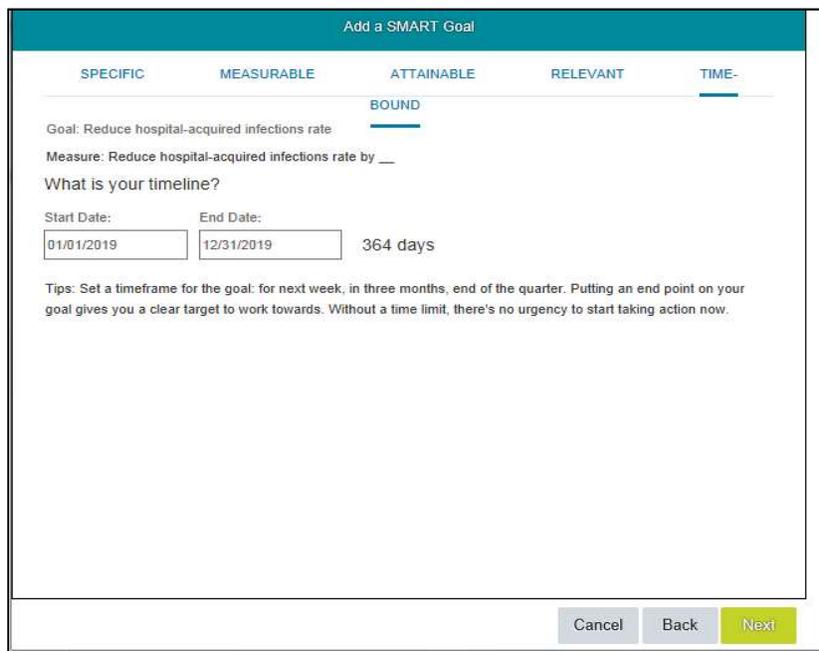
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11. Is this goal relevant? Choose **Yes**. Choosing **No** means you cannot move forward because your goal should be relevant. Click **Next**.



The screenshot shows the 'Add a SMART Goal' form with the 'RELEVANT' step selected. The goal is 'Reduce hospital-acquired infections rate' and the measure is 'Reduce hospital-acquired infections rate by \_\_\_'. The question 'Is this goal relevant?' has 'Yes' selected. A tip at the bottom states: 'Goals should be relevant. Make sure each goal is consistent with your other goals and aligned with the goals of the company, your manager, or your department.'

12. Choose the start and end date for your goal. Click **Next** when dates are entered.

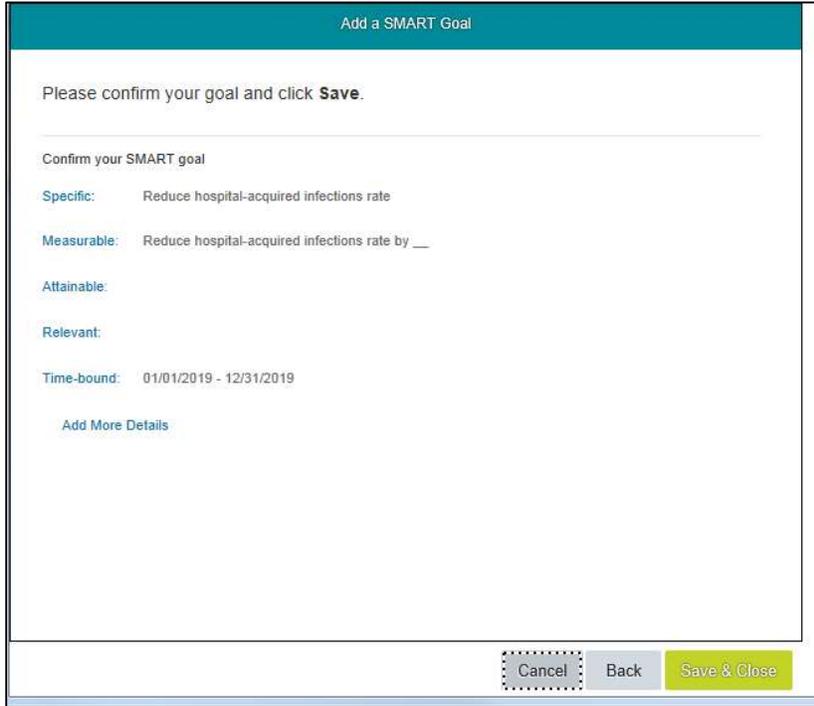


The screenshot shows the 'Add a SMART Goal' form with the 'TIME-' step selected. The goal is 'Reduce hospital-acquired infections rate' and the measure is 'Reduce hospital-acquired infections rate by \_\_\_'. The question 'What is your timeline?' has 'Start Date: 01/01/2019' and 'End Date: 12/31/2019' entered, resulting in '364 days'. A tip at the bottom states: 'Set a timeframe for the goal: for next week, in three months, end of the quarter. Putting an end point on your goal gives you a clear target to work towards. Without a time limit, there's no urgency to start taking action now.'

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13. Review your goal details. To change any details, click the **Back** button. To discard the goal, click **Cancel**. If you are satisfied with the goal, click **Save and Close**.



The screenshot shows a confirmation window titled "Add a SMART Goal". The main heading is "Please confirm your goal and click **Save**." Below this, it says "Confirm your SMART goal". The goal details are listed as follows: "Specific: Reduce hospital-acquired infections rate", "Measurable: Reduce hospital-acquired infections rate by \_\_\_", "Attainable:", "Relevant:", and "Time-bound: 01/01/2019 - 12/31/2019". There is a link "Add More Details" below the time-bound section. At the bottom right, there are three buttons: "Cancel" (dotted border), "Back" (solid border), and "Save & Close" (yellow background).

Your newly created goal will appear on your goal form.

14. Next, you will connect your organizational goal to one of the Performance Dimensions. To do this, click the **Edit** link for your newly created goal.



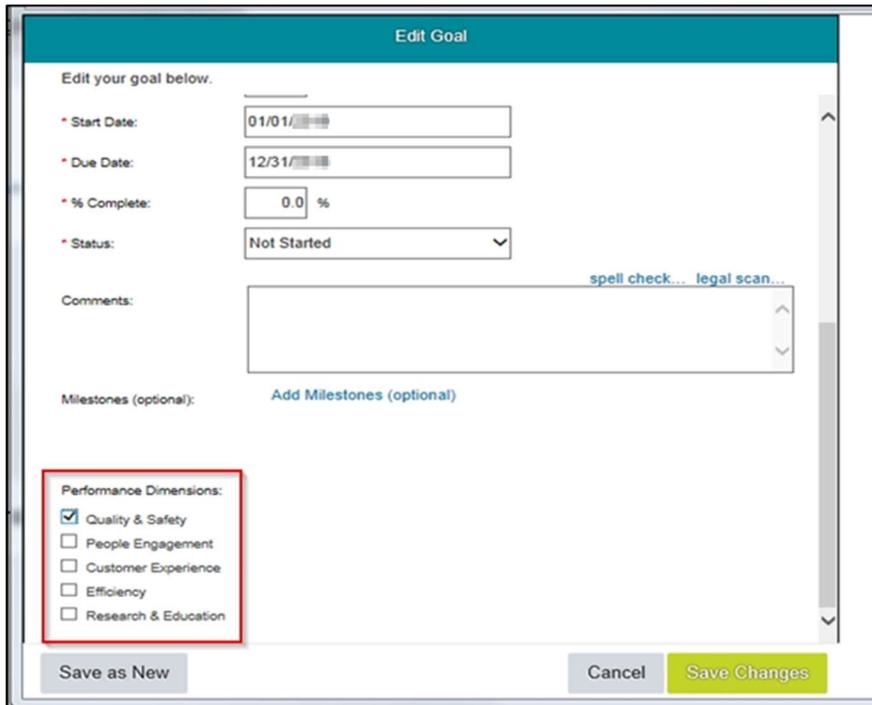
The screenshot shows a list of goals. At the top, it says "Displaying 1-1 of 1 Goals". Below that, it shows "Total Weight: 0.0%" with a warning icon and "Min: 1.0% (Min:1)". The goal is listed as "Organizational Goal" with a checkbox and the text "Reduce hospital-acquired infections rate". To the right of the goal text is an "Edit" link. Further to the right, under the heading "Measure", is the text "Reduce hospital-acquired infections rate by \_\_\_".

**Note:** Only connect your goal to ONE Performance Dimension.

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15. Scroll down to **Performance Dimensions**. Select the Performance Dimension that your goal pertains to.



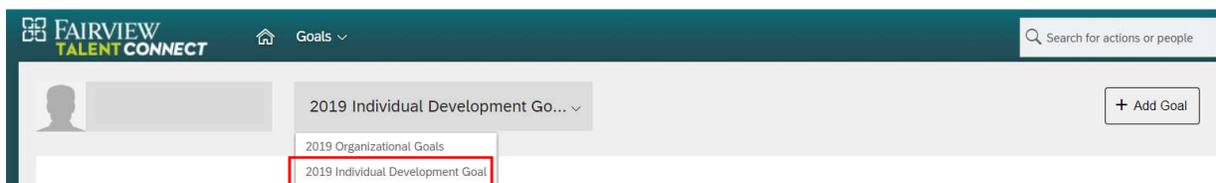
**Note:** Adding a weight to your goal is *not* required. However, you may choose to do that if you would like to.

16. When you have made all the edits you wish to make, select **Save Changes** at the bottom of the form.

17. Repeat the process with any additional organizational goals.

18. Now you will add your Development Goal(s). Select **Individual Development Goal for the appropriate year** from the drop down.

**Note:** Development Goals are only viewable by you and your direct leader.



19. In the goal form, click **Add Goal** and choose **Goal Wizard**.

20. Follow the same steps to complete the entry of your development goal(s); however, there is no need to connect your development goal(s) to a Performance Dimension.

21. Your goals have been recorded in Talent *Connect*! You may track progress in Talent *Connect* throughout the year from the Goal tile.

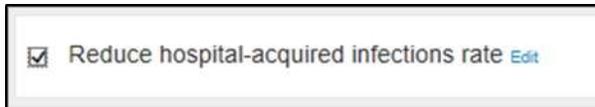
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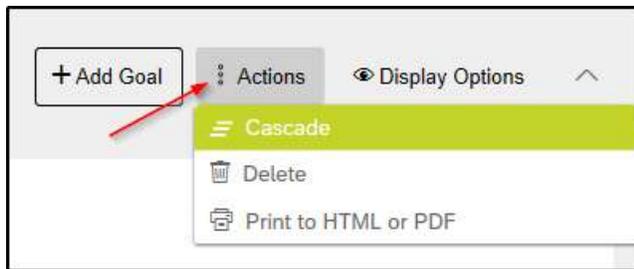
**Note:** Goals entered in the Goal tile will also be displayed in the Performance Review form. You will be able to edit goals from the Performance Review form using the same steps as outlined above.

### Cascading Goals – Leaders Only

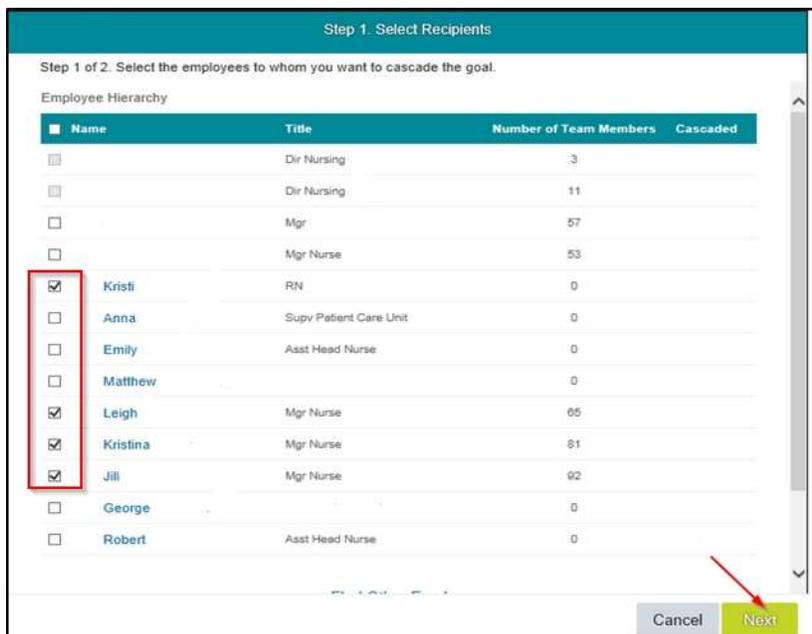
1. To cascade a goal to an employee, start by clicking the box to the left of the goal(s) you wish to cascade.



2. Click the **Actions** tab in the upper right-hand corner. Select **Cascade** from the dropdown.



3. Click the boxes to the left of the names of the employees you wish to cascade the goal to.



4. Click **Next**.

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5. Edit the goal to display as you would like the employee(s) to see it. Your original goal on your goal plan will not change.
6. Click **Cascade** when you're done editing.

Step 2. Edit Goal

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

Fields marked with \* are required.

Already Cascaded To: none

Type: Create My spell check... legal scan...

\* Goal: Reduce hospital-acquired infections rate spell check... legal scan...

\* Measure: Reduce hospital-acquired infections rate by \_\_\_ spell check... legal scan...

\* Weight: 50.0 %

\* Start Date: 01/01/2019

\* Due Date: 12/31/2019

\* % Complete: 0.0 %

\* Status: Not Started

Comments: spell check... legal scan...

Cancel Back **Cascade**

7. You will get a pop-up box confirming the cascade. Click **Ok**. The selected employee(s) will get an alert in the system that they now have a new cascaded goal.



8. The names of the employees to whom you cascaded the goal to will appear below your original goal.
9. You will receive an alert if any of these employees alter the cascaded goal.

Reduce hospital-acquired infections rate [Edit](#)

Reduce hospital-acquired infections rate by \_\_\_ 50.0% Not Started 01/01/2019 12/31/2019 0.0%

**Alert - Aligned Down goal modified by Jill | 12/14/18 3:36 PM clear alert**

Goal aligned down to Kristi  
Reduce hospital-acquired infections rate 50.0% Not Started 01/01/2019 12/31/2019 0.0%

Goal aligned down to Leigh  
Reduce hospital-acquired infections rate 50.0% Not Started 01/01/2019 12/31/2019 0.0%

Goal aligned down to Kristina  
Reduce hospital-acquired infections rate 50.0% Not Started 01/01/2019 12/31/2019 0.0%

Goal aligned down to Jill  
Reduce hospital-acquired infections rate by 5% 25.0% **On Track** 01/01/2019 12/31/2019 0.0%

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10. Your goal(s) have been cascaded in Talent Connect! You may track progress in Talent Connect throughout the year.

### How to Complete a Performance Review Form

Please follow the instructions below to complete a Performance Review form in Talent *Connect*.

1. Access Talent *Connect* via the Intranet under **Applications**.



2. Log in if prompted using your organizational credentials.
3. Choose the **Performance** option under the Home drop-down menu



4. Select the appropriate **Performance Year for [Employee Name]** form for the appropriate employee.

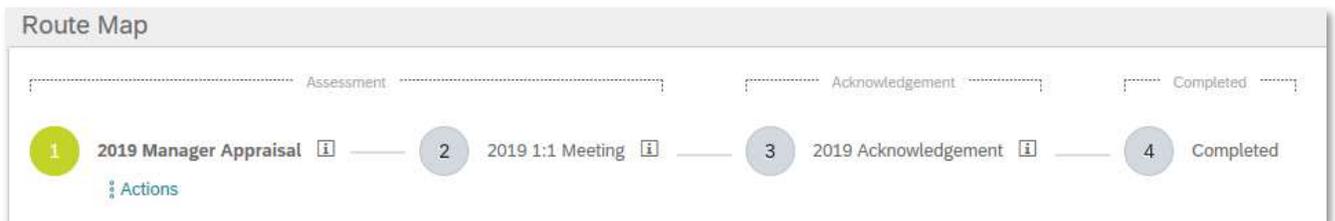
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Form Title ↑	Employee	Step	Date Assigned	Step D
2019 Performance Year for Heather Rubin	Heather Rubin	2019 Manager Appraisal	09/04/2019	
2019 Performance Year for Kristina Ray-Lucas	Kristina Ray-Lucas	2019 Manager Appraisal	09/04/2019	

**Note:** You can click on a column's header title to sort by that column.

- Once open, the review form will display a Route Map. The Route Map lets the user know what step the performance review process is in.



- Before you begin, ensure you have the correct employee's form open by reviewing the Employee Information section.

Employee Information			
First Name	Debra	Last Name	James
Title	Mgr IOL Operations	Division	Corporate (Division)
Department	702408654_System Learning and Develop	Location	702408654
Employee Id	00000		

- Scroll to the **Performance to Goals** section.

**Note:** Employees must have at least one organizational goal on their Performance Review form. Goals should be preloaded onto the Performance Review form, based on the goals entered at the beginning of the year in the Goal form.

You may also add a goal by selecting the **+ Add Goal** in the Goals section. You will be able to create a new goal from scratch or use the SMART Goal Wizard. You may also edit goals by selecting the **pencil** icon next to the goal.



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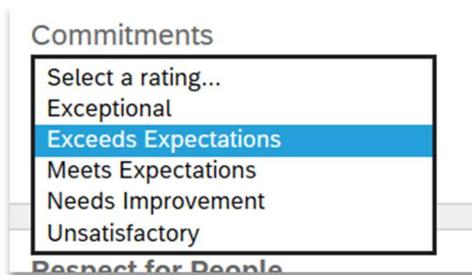
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11. Scroll to the **Commitments** section.

**Note:** To learn more about each of the ten Commitments, click on any of the links below **Respect for People** or **Continuous Improvement**.

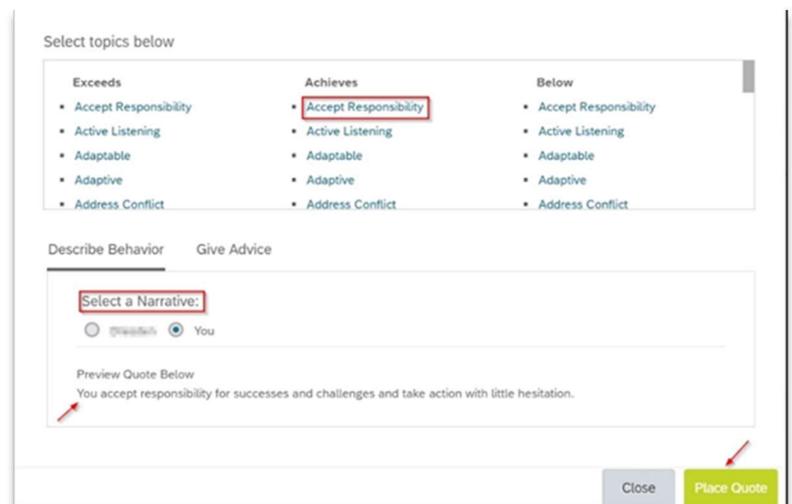


12. Choose ONE rating for the Commitments and enter comments in the comments box.



**Note:** You may use the Writing Assistant by clicking the **Writing Assistant** button above the Comments boxes for Respect for People and Continuous Improvement.

- This will allow you to select pre-written quotes about the employee's ability to demonstrate the Commitments in their work.
- The comments reflect example behaviors at each rating level (Unsatisfactory, Needs Improvement, Meets Expectations, Exceeds Expectations, Exceptional).
- Once you choose the quote, you can choose a narrative (2<sup>nd</sup> or 3<sup>rd</sup> person), preview the quote, and place the quote in the Comments box.
- The quote can be manually edited once placed.



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13. Scroll to the **Functional Excellence** section.

14. Choose a rating from the **Ratings** drop down. A rating is required.



The screenshot shows the 'Functional Excellence' section of a performance review form. A dropdown menu is open, displaying the following options: 'Select a rating...', 'Exceptional', 'Exceeds Expectations' (highlighted in blue), 'Meets Expectations', 'Needs Improvement', and 'Unsatisfactory'. Below the dropdown, there is a text input field for 'Comments by James M. Evenden:' and a rich text editor toolbar with options for 'Size', 'Az', and a home icon.

15. Enter **Manager Comments**. Comments are required in all sections with a comment box.



The screenshot shows the 'Functional Excellence' section of a performance review form. The 'Rating' dropdown is set to 'Exceeds Expectations'. Below it, there is a text input field for 'Performance Review Comments by James M. Evenden:' and a rich text editor toolbar with options for 'B', 'I', 'U', 'List', 'Text', 'Link', 'Size', 'Az', and a home icon.

16. Scroll to the **Development** section. This section is not rated. However, comments are required.



The screenshot shows the 'Development' section of a performance review form. It contains the following text: 'Individual Development goal(s) should describe areas on which the employee wants to focus on growing or becoming better at. rated.' and 'Managers: Add comments to capture how you have seen the employee progress toward their development during the year.'

17. Enter **Comments** about the employee's development through the rating period.

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Individual Development  
Goals   
Measurement

\* Performance Review Comments by James Q. Coulter:

**B** *I* U | | | | | | | S | Az

This is a required field. The form will not route if it is empty.

18. Scroll to the **Summary** section. The system will automatically calculate an average, weighted **Overall Form Rating** based on your ratings in the Performance to Goals, Functional Excellence, and Commitment areas.

Overall Form Rating:

Exceptional

Name	Description
Performance to Goals	Exceptional: Consistently surpasses expectations in goals and behaviors; role models & inspires others
example	Exceeds Expectations: Frequently exceeds expectations in goals and behaviors
fdsafd	Meets Expectations: Achieves goals and demonstrates consistent behaviors
Commitments	Needs Improvement: Inconsistently meets expectations in goals and behaviors
Commitments	Unsatisfactory:
Functional Excellence	
Functional Excellence	

19. Enter comments for the **Summary** section. Comments are required in all sections with a comment box.

Summary Performance Review Comments

\* Performance Review Comments by James Q. Coulter:

**B** *I* U | | | | | | | S | Az

This is a required field. The form will not route if it is empty.

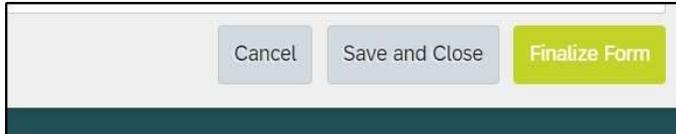
**Note:** The Summary Comments should be used to summarize overall performance from through the year.

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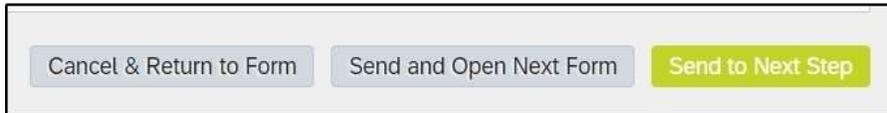
20. Once the form is complete, select **Save and Close** or **Finalize Form**.



- a. **Save and Close** will save the form and allow you to make additional changes and comments before the form's due date.
- b. **Finalize Form** means you are ready to send it to the next step and do not need to make any additional changes. Once you select this, you will not be able to edit the form.

**Note:** You will receive an error message if any required fields have not been complete, or if goal weight percentage does not equal 100%. Make sure all fields are complete and organizational goals total a weight of 100%.

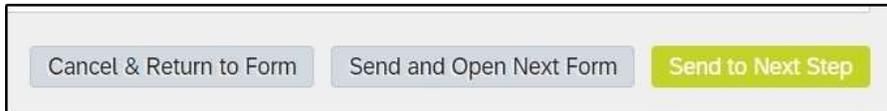
21. After choosing **Finalize Form**, select **Send to Next Step**. This routes the form to the next step, which is the 1:1 Meeting.



**Note:** Once you send the form to the Next Step, you cannot move it back to Manager Appraisal if additional edits are needed. Only send the form to the next step once you are sure it is final and near its due date (i.e., mid-February).

22. Schedule and hold the 1:1 Performance Conversation with the employee.

23. Once the 1:1 Performance Conversation is complete, scroll to the bottom of the form and click **Send to Next Step**.



24. This routes the form to the employee.

- a. The employee will receive an email informing them that they need to log into Talent *Connect* to acknowledge the Performance Conversation has been completed.

**Note:** Employees cannot see your completed review (ratings and comments) until after the 1:1 conversation and after the form is moved to the Acknowledge step.