ePerformance – Quick Reference

Performance Management: Planning (Exempt)

Quick Reference Topics

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Introduction to Performance Management

- Performance Management Process
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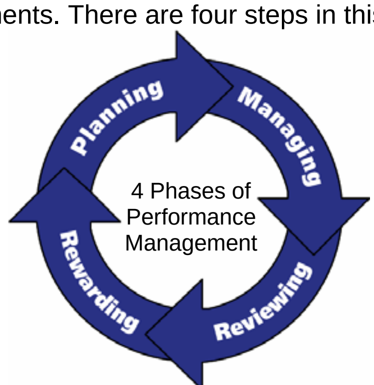
Performance Management Process

Performance management is an ongoing process that defines performance expectations, monitors ongoing performance, communicates results and rewards accomplishments. There are four steps in this process:



For Support

1. Visit the Growth and Development sections on McKNet at http://mcknet.mckesson.com
2. Contact the Employee Services Center at 1-866-772-6601. Say "HR", then say "Navigational Assistance."
3. Contact your local HR Representative.

Logging onto ePerformance

1. Access McKNet at http://mcknet.mckesson.com
2. Sign on using your User ID (which is your "e" id) and password, and click the **Sign In** button.
3. **Employees**: To access your performance document:
   - Click on the **My Life and Career** tab
   - Click the Access Your Performance Document link located in the Growth and Development section

   Managers: To access your direct reports' performance documents:
   - Click the **My Team** tab, and open the Growth and Development page
   - Click the Access Performance Documents link.

Phases for the ePerformance Online Document

This table represents the phases a **typical online performance document** should follow throughout the fiscal year.

Phase	Employee Tasks	Manager Tasks
Planning	Add/Edit/Update the performance document.	Add/Edit/Update the performance document.
		Click **Planning Complete** - starts 'Tracking' phase.
Tracking		Add/ Edit/Update the performance document if needed
	Add comments and ratings.	Add comments and ratings.
	At Mid-Year, enter Mid-Year comments.	At Mid-Year, enter Mid-Year comments, conduct Mid-Year Review with employee and click **Mid-Year Review Conducted**.
	At Year-End, complete self-assessment.	At Year-End, enter final ratings and comments. Conduct year-end review with employee. Click **Year-End Review Conducted** – starts 'Review Conducted' phase.
Review Conducted	Review document, add Year-End comments and click **Acknowledge** – starts 'Acknowledged' phase	None.
Acknowledged	None.	Enter comments in the Manager Year-End Comments section only if needed. Document goes automatically into 'Complete' phase.
Complete	None.	None.

Performance Planning

- Roles in the 'Planning' phase
- Creating a Performance Plan
- Completing the 'Planning' phase
- Copy / Cascading Items (Manager function)

Roles in the 'Planning' Phase

Responsibility	Supervisor	Employee
Understand organization and department goals	x	x
Identify key job responsibilities and projects for the employee and help develop a performance plan	x	
Provide input on or draft performance plan	x	x
Identify competencies necessary for successful achievement of the result	x	x
Engage in ongoing discussions about performance progress	x	x
Communicate any changes in department priorities and/or expectations	x	
Ensure objectives are comparable to those set by supervisors of other employees in similar roles	x	

Creating a Performance Plan

Below is the sample screen capture of a performance document.

Job Data Information

Name:	Employees, Joe	**Supervisor Name:**	Manager, Jane
EmplID:	12345	**Grade:**	505
Job Title:	HRIS Manager 3	**Document Status:**	Planning
Begin Date:	04/01/2007	**End Date:**	03/31/2008

Expand All Sections | Collapse All Sections | Print Document | File Attachments
Mission / Vision / Goals | Business Scorecard | Shared Principles | Performance Mgmt Overview

- Performance Objectives
- Competencies
- Shared Principles (ICARE)
- Individual Development Plan
- Mid-Year Comments
- Year-End Review

Based on the performance document sections, below are the basic steps for creating a plan:

1. **Performance Objectives section**
   - Suggested 3 - 7 SMART objectives total with a maximum of 10. Each can align with a Scorecard goal which you can find under the Business Scorecard section.
   - Supervisors should include an additional developmental objective for Developing Others.
     1. Navigate to the Performance Objectives section and click the Expand arrow.
     2. Click the Add / Delete Performance Objectives Criteria link.
     3. Click the **Add Performance Objectives** button.
     4. In the Short Description field, type a brief description for that objective.
     5. In the Description field, type a SMART description for that objective.
     6. (Optional) In the Supports field, use the drop-down list to select which McKesson Scorecard goal this objective may support.
     7. (Optional) Select the Critical checkbox if this objective is critical to your performance or the performance of the business unit for this fiscal year.
     8. **If you are done adding performance objectives**, click **Save and Return to Plan**. When the Save confirmation screen is displayed, click **OK**.
        OR
        If you have additional performance objectives to add, click **Save and Return to Add Performance Objectives**. When the Save confirmation screen is displayed, click **OK**. Then repeat steps 3 – 8 for each additional performance objective.

2. **Competencies section**
   - The nine Core Competencies measure the skills, knowledge, and behaviors you use to reach your objectives. Together with your manager, select the tier with which you should align (Professional, Leader, or Executive), then select at least 5 of the 9 competencies. You may also add additional functional or technical as necessary.
   - **To delete a listed competency**:
     1. Navigate to the Competency section and click the Expand arrow.
     2. Click the Add / Delete Competency Criteria link.
     3. Locate the competency that you want to delete and click the associated **Delete** button.
     4. At the Delete Confirmation page, click either **Yes – Delete** or **No – do not delete**.
     5. To go back to the performance document, click the return link.
        OR
        To add additional competencies, click the **Add Competencies** button and begin at step 4 in the following tasks.
   - **To Add an existing competency (one of the original core set of 9):**

1. Navigate to the Competency section and click the Expand arrow.
2. Click the Add / Delete Competency Criteria link.
3. Click the **Add Competencies** button.
4. Click the **Add a pre-defined competency** radio button, and then click the **Next** button.
5. If you leave the Title field blank and click the **Search** button, the page will display all the core competencies that have been deleted from that performance document.
6. Locate the competency you want to add, and then click the **Save and Add Competencies** button
   or
   Click **Save and Return to plan** button.
7. When the Save Confirmation page is displayed, click **OK** and continue to add competencies or click **Return to Maintain Documents** button.

- **To Add your own competency (e.g. technical or sales):**
  1. Navigate to the Competency section and click the Expand arrow.
  2. Click the Add / Delete Competency Criteria link.
  3. Click the **Add Competencies** button.
  4. Click the **Add your own item competency** radio button, and then click the **Next** button.
  5. In the Short description field, enter the title of the competency (e.g.: Negotiations)
  6. In the Description field, enter a description of the competency.
  7. **If you are done adding competencies,** click **Save and Return to Plan**. When the Save confirmation screen is displayed, click **OK**.
     OR
     If you have additional competencies to add, click **Save and Add Competencies** button. When the Save confirmation screen is displayed, click **OK**. Then repeat steps 3 – 8 for each additional competency you want to add.

3. **Shared Principles (ICARE) section**
   - The ICARE section is part of everyone's performance plan. This section will be commented and rated as a whole versus individual principles.
   - During the Planning phase, no comments or ratings are required in this section.
   - To review the ICARE definitions and details, click the Shared Principles link on top of the page.

4. **Individual Development Plan section**
   - Supervisors and employees can create 1 - 4 SMART development objectives.
   - Development objectives are not rated; however, they should help employees succeed in their objectives for the year.
   - **To Add a Development Objective:**
     1. Navigate to the Individual Development section and click the expand arrow.
     2. Click the Add / Delete Individual Dev. Plan Criteria link.
     3. Click the **Add Individual Development Plan** button.
     4. In the Short description field, enter the title of the Development objective (e.g.: XYZ Certification)
     5. In the Description field, enter a description of the Development objective. Answer the questions on the screen to guide you.
     6. **If you are done adding Development objectives,** click **Save and Return to Plan**. When the Save confirmation screen is displayed, click **OK**.
        OR
        If you have additional Development objectives to add, click Save and Add Individual Development Plan button. When the Save confirmation screen is displayed, click **OK**. Then repeat steps 3 – 8 for each additional Development objective you want to add.

Completing the Planning Phase

The Planning phase is complete when the manager and the employee have held a meeting (face-to-face meeting is recommended) and discussed and reviewed the performance document and all of its components:

- Performance objectives,
- Competencies,
- Development objectives and
- reviewed the ICARE section

Managers are responsible for completing the Planning Phase. To complete the Planning phase, the manager will access the performance document and click the **Planning Complete** button after having reviewed the content for accuracy. The performance document now goes into the 'Tracking' phase.

Copy / Cascade Items (Supervisors Only)

The Copy / Cascade Items function is designed to give managers the ability to copy from an existing document (either their own plan or one of their direct reports plans) or create new item(s) and cascade them to one or all of their (direct or indirect) reports.
This tool is especially useful to managers who have the same performance objectives, set of core competencies, or similar development objectives for more than one of their reports. Items can be cascaded to just one employee

or as many employees as the manager chooses (as long as they report up to the manager).

NOTE: Notify your employees that you have established specific items for them so they don't delete them.

1. Click the **Copy/ Cascade Items** button from the main Performance Management screen
2. In the Choose a Section field, use the drop-down list to select a section and then click the Continue button. You can copy / cascade from the following sections:
   - Competencies
   - Individual Development Plan
   - Performance Objectives
3. You have two options:
   - Click the **Add** button – if you want to add a new item
     OR
   - Click the **Copy** button – if there is an existing item that you want to copy from (either your own or one of your direct reports)
   - Follow the appropriate set of instructions to compete the Copy / Cascade function.

To Add a new Competency/ Development Plan Objective/ Performance Objective:

1. Click the **Add** button.
2. In the Short description field, enter the title of the competency.
3. In the Description field, enter a description of the competency.
4. Click the **Continue to Select Employees** button. The employees that you "own" performance documents for are displayed. ONLY the performance documents in the Planning and Tracking status are displayed.
5. To copy to your indirect reports, click the **View My Organization** button.
6. Choose one or more employee(s) to copy / cascade the specific section item to by clicking the check box next to their name, and then click **Copy Item to Select Employees** button.
7. At the Save confirmation page, click OK.
8. **If you are done with the Copy / Cascade function,** click the Return to Maintain Document link to display the performance document.
   OR
   If you have additional items to Copy / Cascade, repeat the appropriate steps above.

To Copy an existing Competency/ Development Plan Objective/ Performance Objective:

1. Click the **Copy Existing Item** button.
2. Use the drop-down list to choose which performance document (either your own performance document or a one of your direct reports) to copy the item from.
3. **A. If you choose to copy from a performance document of one of your direct reports**
   - Select their name to view their available competencies on their current plan.
   - Click the **Continue** button.
   - To copy an item, select it by clicking the appropriate radio button, and then click the **Copy Selected Item** button.

   B. If you choose to copy from your own performance document
   - Click the **Continue** button.
   - To copy an item, select it by clicking the appropriate radio button, and then click the **Copy Selected Item** button.

   Note: If there are no items displayed, that means the performance document you selected to copy from doesn't contain Competencies.
4. If necessary, you can edit the description or click the **Continue to Select Employees** button.
5. To copy to your indirect reports, click the **View My Organization** button.
6. Choose one or more employee(s) to copy / cascade the competency to by clicking the check box next to their name, and then click Copy to **Select Employees** button.
7. At the Save confirmation page, click **OK**.
8. If you are done with the Copy / Cascade function, click the Return to Maintain Document link to display the performance document.

Printing Performance Documents

You can print the performance document at any point in time. With the document opened:

1. To print what is currently expanded in the document (what you see on the screen), click the Printer icon at the top of the toolbar.
2. To print the entire document, click Print Document.

Reports

Managers have access to run reports for your team (direct and indirect reports).

Two reports are of particular importance for the Planning phase:

- **Development Plan (.pdf)**: To see the development plans for your employees. It lists each person's development plan on one page.
- **Performance Objectives (.pdf**): To see the performance objectives for your employees. It lists each person's performance objectives on one page.

For more information on running reports, refer to the Reports Quick Reference guide.