



## Employee User Guide

# JeffSMART User Guide

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## Contents

Chapter 1 – General Information.....	4
Login.....	4
Navigation & Icons.....	4
Online Help .....	5
What do I do if I need help?.....	5
How Do I Save My Work so That I Complete It Later?.....	7
Chapter 2 - Tasks.....	7
Accessing JeffSmart.....	7
How do I start a self-appraisal? .....	7
What Do the Icons Next to My Tasks Mean?.....	8
Why is My Task Marked as Overdue When Just Receiving a Notification? .....	8
Chapter 3 – Completing an Appraisal .....	9
Performance Appraisal Process Workflow .....	9
Completing Your Self-Appraisal .....	10
Form Sections – Non Manager .....	10
Section Weighting.....	10
Section A: Performance Evaluation .....	10
Section B: Values.....	11
Section C: Performance.....	12
Section D: Overall Performance Summary .....	14
Form Sections – Manager .....	15

# JeffSMART User Guide

---

Section Weighting - Manager .....	15
Section C: Leadership.....	15
Navigating the Form.....	16
Using the Split Screen .....	16
Check Language & Check Spelling.....	17
Add Your Comments & Signature .....	17
Responding to a Multirater.....	18
Chapter 4: My Performance .....	19
Profile.....	20
Goals .....	20
Development Plans .....	21
Feedback.....	22
Journal Note.....	22
Manager Note & Recognition .....	22
Evaluations.....	23
Job Descriptions.....	23
Documents .....	23

## Chapter 1 – General Information

### *Login*

To enter JeffSMART, type your Campus Key and Password. Click Log In to be directed to your Home page.

**Log in to JeffSmart**

Please enter your Username and Password	About This Site
<p>Enter Campus Key (e.g. abc123)</p> <p>Username : <input type="text"/></p> <p>Password : <input type="password"/></p> <p><input type="button" value="Log In"/></p> <p>Need help? Call (215) 955-7975 ☎ to reach the Operations Center. To change your password, please <a href="#">use this form</a>.</p>	<ul style="list-style-type: none"><li><b>Description</b> JeffSmart performance appraisal system.</li><li><b>Browsers Supported</b> Internet Explorer 8 and Internet Explorer 9 are the only certified browsers for JeffSmart. Pop-ups need to be allowed. Mac OS and Safari browsers are not supported. Remote Access (via RAP) - if your Windows Device is not running Internet Explorer 8 or 9, please use the JeffAPPS-Citrix Web Interface link -&gt; login via campus key/password -&gt; click the Internet Explorer icon -&gt; go to Jeffsmart via Employee tab.</li><li><b>Tutorials</b> <a href="#">Click here</a> to access JeffSmart tutorials for employees. <a href="#">Click here</a> to access JeffSmart tutorials for managers.</li></ul>

### *Navigation & Icons*

Throughout JeffSMART, you will always be able to view the Navigation Bar. This bar displays all the different sections that can be accessed while working with within JeffSMART. Your current location will always display in blue. In some sections, a secondary Navigation bar will display with additional areas to view and manage information.

Use the navigation bars instead of using your browser's Back button to reduce your chances of losing unsaved information.



In many areas throughout the JeffSMART application, you will view the following standard icons:

Previous and Next buttons will move you page to page in areas when a search or query returned more results that can be displayed on one page.

# JeffSMART User Guide

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When the Print button is clicked, you will have a choice to print either the standard list of items, or the list along with all associated details.

The Export to Excel button can be clicked to easily export information into Excel for further analysis or data manipulation.

Along with navigation icons, there are a number of status icons that you should be aware of. These icons will be used when tasks are displayed.



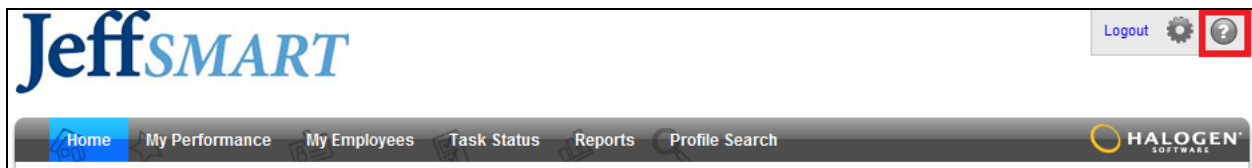
## ***Online Help***

You can access online help for JeffSMART by clicking the Help link. This link will always be located in the upper right hand corner of your screen while you are working within the system.



## ***What do I do if I need help?***

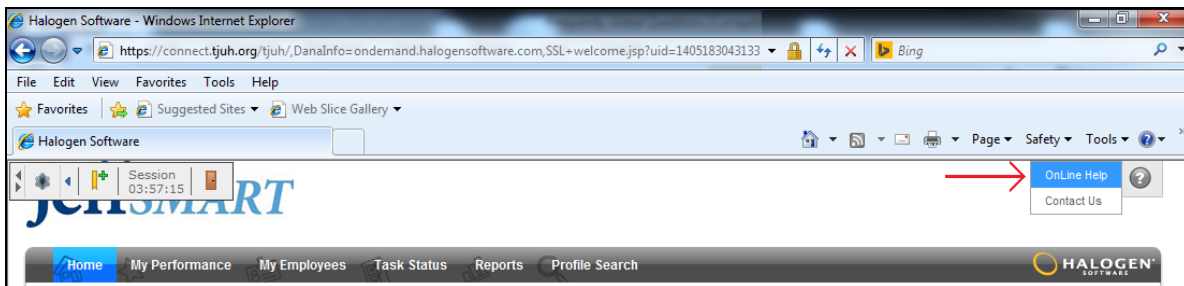
You can access online help for *JeffSMART* by clicking the **Question Mark** icon and selecting the **OnLine Help** link in the upper right hand corner of your screen while you are working within *JeffSMART*.



(Question Mark Icon)

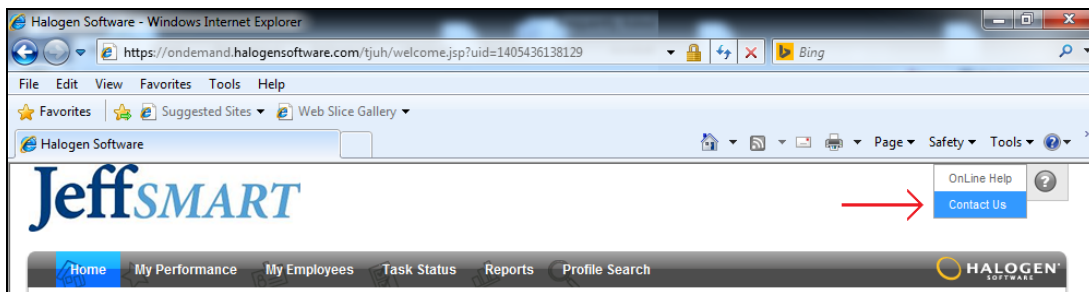
# JeffSMART User Guide

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(OnLine Help Link)

If you still can't solve your problem after using the help files, click on the **Question Mark** icon and select the **Contact Us** link to email the HR Service Center your question.



(Contact Us Link)

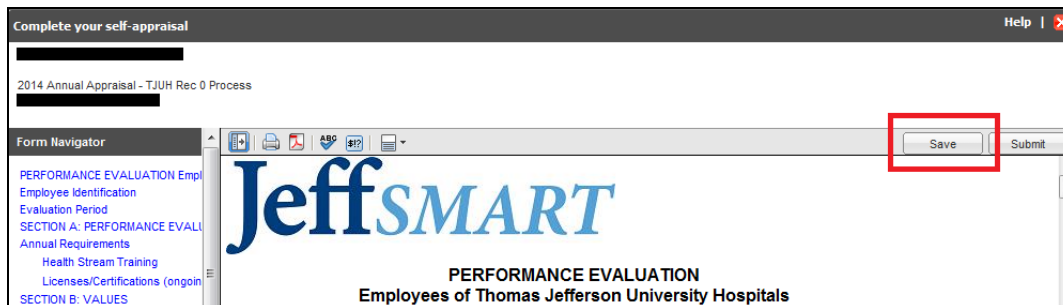
E-mail address: [HRQuestions@jefferson.edu](mailto:HRQuestions@jefferson.edu)

You can also contact the **HR Service Center** via telephone by calling [215-503-4772](tel:215-503-4772) and choosing selection **6**.

You may also refer back to the employee online tutorial that is located on the TJUH Intranet *JeffSMART* login page.

## *How Do I Save My Work so That I Complete It Later?*

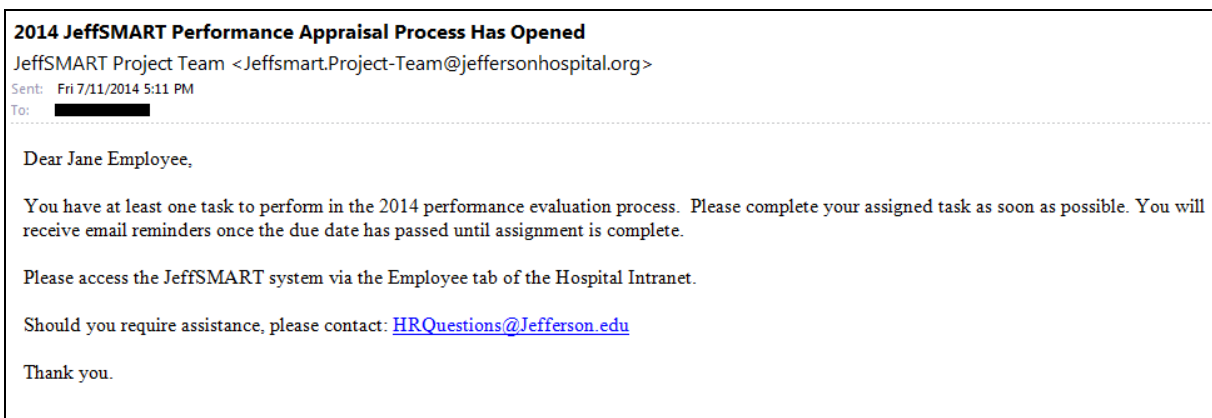
Select the **Save** button to save your work thus far. You will be able to return later to complete the appraisal by selecting the associated step on your home page.



## Chapter 2 - Tasks

### *Accessing JeffSmart*

You will automatically receive an email from the system notifying you that you have at least one task\* to complete. It will include instructions on how to access the *JeffSMART* system. After logging in, you will find assigned tasks on your home page.



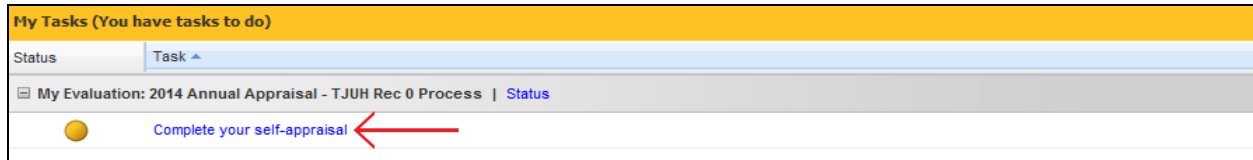
(Email Notification)

\*Tasks are defined as steps that you are responsible for completing

### *How do I start a self-appraisal?*

# JeffSMART User Guide






To start a task, click the title of the step name to open the task.



(Elect task description)

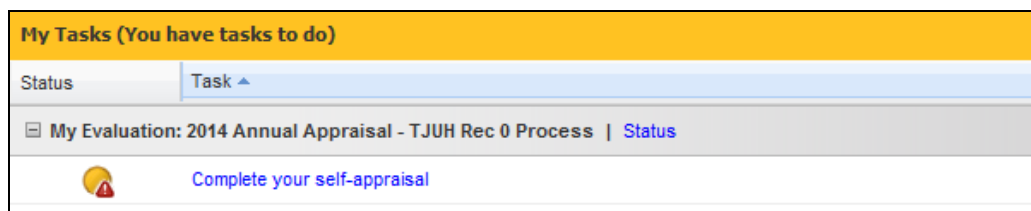
## ***What Do the Icons Next to My Tasks Mean?***

The icons that appear next to your tasks indicate the status of your task:

	Overdue	Tasks that are past due and should be prioritized
	My To-Do	Tasks that need your attention but are not yet past due
	Sent for Review	Tasks that you have sent to another employee for them to review
	Not Ready	Tasks that are not yet available to you
	Completed	Tasks that have been completed and no longer require your attention

## ***Why is My Task Marked as Overdue When Just Receiving a Notification?***

Each *JeffSMART* process follows a pre-defined series of date-driven steps. If any assigned individual along that cycle misses a due date, you may receive an overdue e-mail. In this case simply complete the task as soon as possible.



(Task Past Due)



## Chapter 3 – Completing an Appraisal

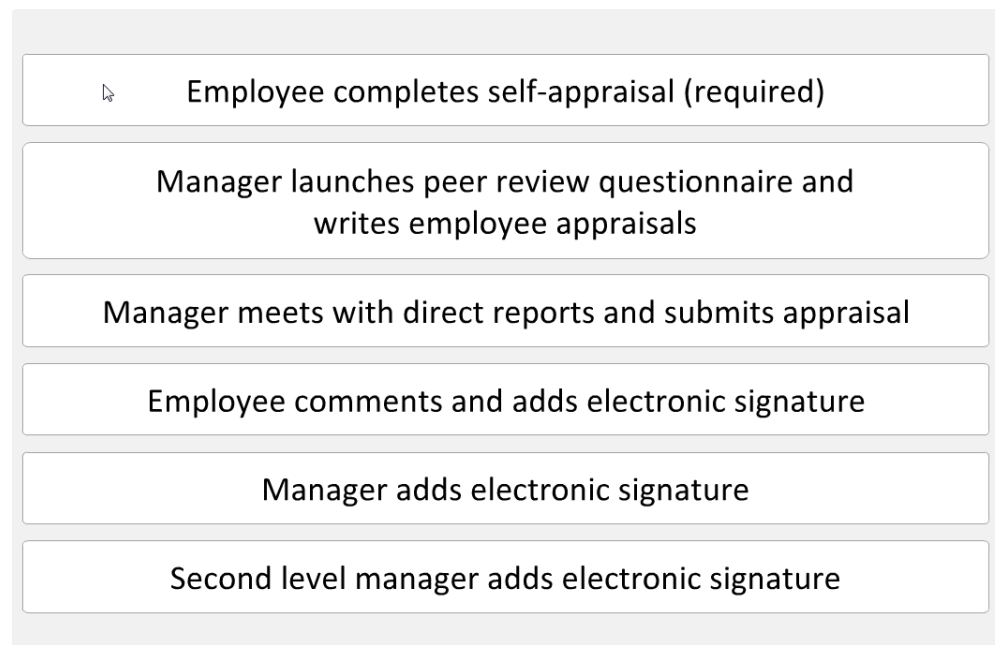
### *Performance Appraisal Process Workflow*

JeffSMART was designed for managers to evaluate employee performance and goal achievement for the past year, along with setting goals and development for the coming year. Using feedback from the employee's self-appraisal and multirater reports, completing this appraisal will allow the tracking and reporting of how an employee's individual performance relates to the organization's overall success.

The following steps outline the workflow of the Performance Appraisal Process:

1. Employee completes self-appraisal (required)
2. Manager launches peer review questionnaire and writes employee appraisals
3. Manager meets with direct reports and submits appraisal
4. Employee comments and adds electronic signature
5. Manager adds electronic signature
6. Second level manager adds electronic signature

All steps displayed can be completed within the JeffSMART system and will be explained in detail in the next chapters.



## ***Completing Your Self-Appraisal***

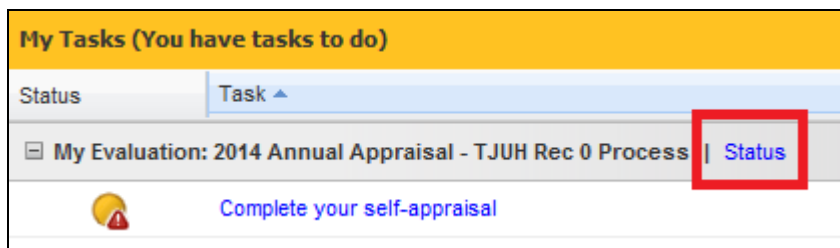
It is mandatory for all employees to write a self-appraisal.

When you have been assigned this task, a link to complete your self-appraisal will display on your Home Page. Click the link to be directed to the appraisal form.

Within the form, complete all sections by completing the performance evaluation, job duties and performance expectations, Goals, Balanced Scorecard, Professional Development Plan, and Overall Evaluation.

Click the Save button to save the form and return to it later.

Click the Submit button to submit your self-appraisal to your manager for review.



## ***Form Sections – Non Manager***

The following are the sections for the non-manager performance template.

### **Section Weighting**

Section B: Values	50%
Section C: Performance – Progress Towards Goals	50%

### **Section A: Performance Evaluation**

In this section you will be evaluated on your performance for the year. In the Annual Requirements section select if you have met or not met each requirement. If the requirement is not applicable to the employee, select N/A.

# JeffSMART User Guide

## SECTION A: PERFORMANCE EVALUATION

### Annual Requirements

**M** - Meets  
**NM** - Does Not Meet  
**N/A** - Not Applicable

	M	NM	N/A
Health Stream Training	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Licenses/Certifications (ongoing compliance)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Section B: Values

In Section B: Values these are our 6 iScore values of innovation, service excellence, collaboration, ownership, respect, and empowerment are individually measured.

## SECTION B: VALUES

TJUH has its **SCOR** values which guide our day-to-day behaviors. To further promote a consistent interpretation of the values and the expected behaviors, TJUH has defined specific behavioral anchors for each of the **SCOR** values.

### Instructions

#### EMPLOYEE:

## Section C: Performance

This section lists the Job Duties / Performance Expectations, Unit/Department/Population Specific, Annual Competency Assessment and Progress Towards Previous Goals.

### Job Duties

For the Job Duties section, you rate yourself on your overall performance of job duties, not for each individual job duty.

#### SECTION C: PERFORMANCE

##### JOB DUTIES/PERFORMANCE EXPECTATIONS

Abstract and enter medical records according to the Atlas Glossary and maintains a 95% accuracy rate.
Abstract charts according to the Premier Data Dictionary and maintain a 95% on DQR.
Assess Quality Measure abstracting
Identify misfiled documentation, charts with potential deficiencies and abstracting problems.
Run Premier error list at end of each month and make appropriate corrections in system.
Send question to Quality Demo at Premier when unclear how to proceed with abstracting.
Take list of charts to be abstracted from the Premier Website and enter the charts into HIMD chart request system.
Train Documentation Specialists
Train Quality Measure abstractors

### Job Duties / Performance Expectations

For the Unit/Department/Population Specific you rate yourself on the individual departmental duty / goal, if listed.

# JeffSMART User Guide

## Unit/Department/Population Specific

**Performance Rating**

**M** - Met  
**NM** - Not Met  
**N/A** - Not Applicable

**Validation Method**

**OW** - Observation of Work  
**EW** - Evidence of Work  
**N/A** - Not Applicable

			Performance Rating			
			M	NM	N/A	Validation Method

## Annual Competency Assessment

For Annual Competency Assessment, you will rate yourself on each annual competency.

### Annual Competency Assessment

**Performance Rating**

**M** - Met  
**NM** - Not Met  
**N/A** - Not Applicable

**Validation Method**

**OW** - Observation of Work  
**EW** - Evidence of Work  
**N/A** - Not Applicable

		Performance Rating			Validation Method
		M	NM	N/A	
1. Enter the competency to the right.	<b>test</b>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/> OW <input type="checkbox"/> EW <input type="checkbox"/> N/A
2. Enter the competency to the right.	<b>test2</b>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/> OW <input type="checkbox"/> EW <input type="checkbox"/> N/A

## Progress Towards Previous Goals

This is where you can provide a rating and comment on achievement for goals set in the previous year's goal evaluation form. Previous goals set within JeffSMART will be automatically populated in this section. You can add and delete goals.

Progress Towards Previous Goals		Score: 3.00 / 3.00
Goals		Score
Title: test		3.00 / 3.00
Rating: Exceeds		
Individual SMART Goal	<input type="text" value="test"/>	
Achievement	<input type="text" value="test"/>	

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**SECTION D: OVERALL PERFORMANCE SUMMARY**

## Section D: Overall Performance Summary

The summary score has been determined for your guidance based on the evaluation of the sections. You should select the appropriate rating based on your overall performance.

Please note that if the overall rating is "Opportunity for Improvement" then the manager is responsible for completing the Improvement Action Plan on the Manager form. Also, for the Career/Professional Development Plan, the manager is responsible for completing. The employee can add comments if he /she desires.

### SECTION D: OVERALL PERFORMANCE SUMMARY

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Your overall Performance Summary reflects your success at demonstrating the Jefferson SCOR Values and the outcome of achieving your Goals.

### OVERALL PERFORMANCE

Rating: Exceeds

## ***Form Sections – Manager***

The only difference between the non-manager performance template and the manager template is the additional Leadership section. This section follows the Values section of the form.

## **Section Weighting - Manager**

Section B: Values	50%
Section C: Leadership Success Factors	15%
Section D: Performance – Progress Towards Goals	35%

## ***Section C: Leadership***

This section is only included in the manager performance templates for Nurse Manager, Non-Clinical Manager, and VP Magnet forms.

### **SECTION C: LEADERSHIP SUCCESS FACTORS**

Thomas Jefferson University and Hospitals' **Leadership Success Model** includes behaviors that have been identified as those that leaders at Jefferson need in order to be successful at Jefferson in our changing environment. To promote a consistent interpretation of the Leadership Success Factors, we have provided rating definitions for each factor, at each rating level.

#### **Instructions**

#### **EMPLOYEE:**

Self Evaluation – There are two rating definitions listed under each rating level. These are examples of behaviors for each Leadership Success Factor. Choose the rating level that most closely aligns with how effectively you demonstrate that Leadership Success Factor.

#### **MANAGER:**

There are two rating definitions listed under each rating level. These are examples of behaviors for each Leadership Success Factor. Choose the rating level that most closely aligns with how effectively the employee demonstrates that Leadership Success Factor.

### **Leadership Success Factors**

Score:  / 3.00

#### **Transforms**

**Exceeds**

Anticipates the changing business environment and consistently develops innovative solutions that challenge the status quo and meet future needs. Fosters an environment that encourages employee innovation.

Creates a climate where people feel included and tied to the organization's vision. Inspires and engages people to drive organizational change and transformation.

**Achieves**

Develops and supports employees in developing innovative solutions that reflect changing business environment and challenge the status quo.

Leads people through change by creating a compelling case for action; drives implementation.

**Opportunity for Improvement**

Does not champion change or adapt to the fluctuating business environment by designing new solutions. Discourages or fails to support the sharing of new ideas by employees.

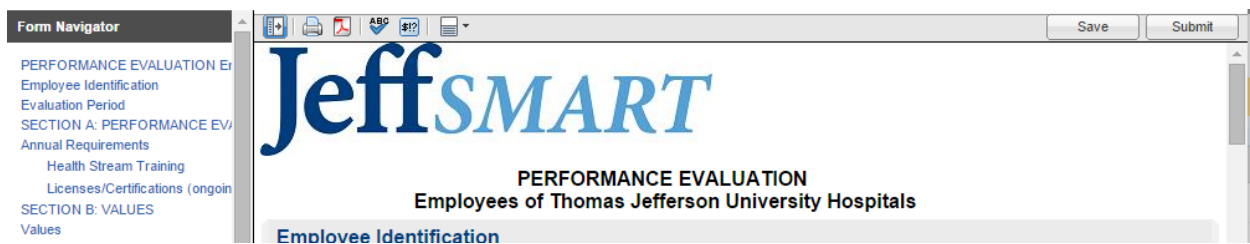
Is unable to articulate a vision for the future and/or the need for change. Does not motivate team to support change initiatives and transformation.

## ***Navigating the Form***

As you complete a form, you can quickly view a specific section using the left navigator.

Within the Form Navigation area, click the link for the section you want to view. The selected section will display in the appraisal window.

Click the Expand/Collapse Navigation button to display or hide the Form Navigation area.

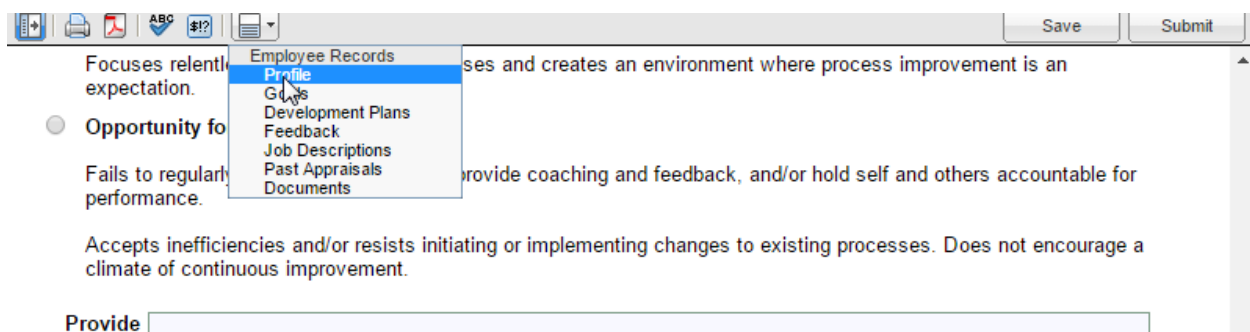


## ***Using the Split Screen***

While completing an appraisal form, click the split screen icon to view your self-appraisal and information contained in your My Performance area in a scrolling window below the current form.

See the My Performance section of this tutorial for detailed instructions on how to filter and manage Performance information.

Use the Up and Down arrows to hide and display the split screen, and the X button to close the split screen view.





## ***Check Language & Check Spelling***

JeffSMART includes a spell and language check tool. Press the Check Spelling icon at the top of the form to check the entire form for spelling mistakes, or click the Check Spelling icon within the form to check a specific section.

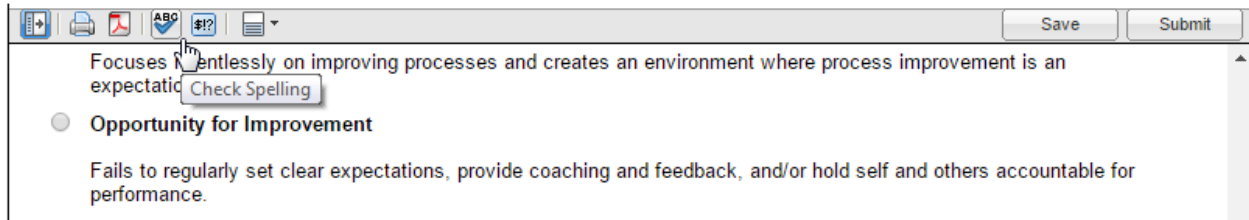
The CheckLanguage tool will flag words that may be offensive and offer suggestions for replacement words; such as replacing the word “lazy” with “unmotivated”.

The spell and language check will run automatically when you complete the form.

An appraisal form can be printed at any time by clicking the Print icon at the top of the form. Select Normal Print or Condensed Print. Normal Print will print the form as it is shown on your screen, while Condensed Print will print a shorter, condensed version of the form. To keep sections together on a page, deselect Allow Sections to break across pages.

Click OK when finished. The appraisal form will appear in a new browser. You may now print the appraisal form using your browser’s print function.

By clicking the Export to PDF button, you can export an appraisal form to PDF at any time. Once the Export to PDF button is clicked, the file will open in PDF format in a new window where you can use the appropriate icons to Save or Print the file.



## ***Add Your Comments & Signature***

Once your manager has completed writing your appraisal, you will be required to add your electronic signature to the appraisal form.

When you have been assigned this task, a Signature link will display on your Home page. Click the link to open the completed appraisal.

Review the form, and at the bottom, enter any comments that you have regarding the content of the appraisal or the meeting with your manager.

# JeffSMART User Guide

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When finished, click the Sign-off link to add your electronic signature. Enter your password and click OK. A date and time stamp will be added to the bottom of the form.

Once you have signed off, the form will be sent back to your manager for signoff.

## Employee Acknowledgement

Click the hyperlink to review the employee acknowledgements statement and confirm review below.

 [Attach Feedback](#)

## Employee Comments

## Evaluator Comments

## ***Responding to a Multirater***

You may be requested to participate in a Multirater evaluation to provide feedback on the performance for another employee. If you have been requested to participate in a Multirater assessment, the CompleteMultirater Assessments link will appear on your Home page. Click the task selector and click the Edit Multiraterlink.

The Multirater assessment form will display.

Complete the assessment by entering a rating for each section. Select Not Applicable if you can not accurately rate the employee for any given item. Enter comments as required. If you have not comments to enter, type N/A, as a response is necessary in this area.

Click the Submit button when you are finished completing the assessment. All questions must be answered to be able to submit the form. Once you click the Submit button, the answers will be sent to

# JeffSMART User Guide

the requesting manager and you will no longer be able to make any changes to the assessment.

My Tasks (You have tasks to do)			
Status	Task	Due Date	Completed
My Evaluation: V10 TRAINING   Status			
	Complete your self-appraisal (required)	03/10/2011	N/A
V10 TRAINING   Status			
	Complete multi-rater assessments (1 To-Do)	03/06/2011	0 of 1

## Chapter 4: My Performance

The My Performance tab contains all the performance information that is related to you as an employee. You will have access to this section throughout the year, and it is recommended to enter this area on a regular basis to keep all your employee performance information up-to-date.

Please note that your line of management and HR also have access to your My Performance area.

The screenshot shows the 'My Performance' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'Profile', 'Goals', 'Development Plans', 'Feedback', 'Evaluations', 'Job Descriptions', and 'Documents'. The 'Profile' tab is active, displaying the following information:

- Justin Employee**  
Dir Operation Support  
Last Updated 04/13/2015
- Direct Manager: James Manager  
Department: Operations Support

This is a duplicate of the screenshot above, showing the same 'My Performance' tab interface with the 'Profile' tab selected and displaying Justin Employee's information.

# JeffSMART User Guide

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## ***Profile***

Your Employee Profile holds your basic employee information. This information is read-only and can only be edited by HR.

## ***Goals***

The Goals area will store all the objectives that have been assigned to you within the JeffSMART system. A Goal can be assigned to you 2 different ways:

-During an appraisal process, any newly set goals that have been entered in the form by your manager will be populated into your Goals area.

-Throughout the year, your manager may manually add goals directly in your Goals area.

You are encouraged to update your goal status on a regular basis to keep all information up-to-date. This information will be accessible to management for goal reporting throughout the year.

To view goal details on the main screen, click the + icon beside the title.

Click the title of the goal to open the window.

You will not be able to edit the content of the goal, although you will be able to use the dropdowns and radio buttons to select the current Status, PercentComplete and ProcessFlag. Green indicates that the objective is on track to be completed on time, orange indicates that the objective is at risk of not being completed on time, and red indicates that the objective is not on track to be completed on time. By default, no flag is set.

If you want automatic reminders emailed to you before the goal due date, click the reminder checkbox and enter the number of days before the due date that the message should be sent. Add a recurring message by using the checkbox below.

Click OK when finished.

While in the Goals section, you can click the Options button to display a number of filtering options for the goals. You can display or hide goals with certain statuses, based on Dates, or only show goals that were set during a specific performance appraisal process.

Click the Refresh List button to apply the filters you selected. Click the Options button again to close the filter area.

Progress Flag	Linked	Employee Goal	% Complete	Weight	Entered By	Modified Date	Due Date
		Finance & Operations	2%	0	James Manager	04/09/2015	
		Finance & Operations	2%	0	Jennifer Manager	06/27/2014	
		Growth	2%	0	James Manager	04/09/2015	
		Growth	2%	0	Jennifer Manager	06/27/2014	
		HealthStream	2%	0	Matthew Durso	01/09/2013	06/30/2013
		People	2%	0	James Manager	04/09/2015	
		People	2%	0	Jennifer Manager	06/27/2014	

## ***Development Plans***

The Development Plan area stores all development plans that have been assigned to you. A development plan can be assigned to you 2 different ways:

- During an appraisal process, any development plans that are assigned to you by your manager within the appraisal form will be populated in your Development Plan area.
- Throughout the year, you, your manager or HR Representative may manually add development plans directly in your Development Plan area.

Like Goals, you are encouraged to update your development plan status on a regular basis to keep all information up-to-date. This development plan information will be accessible to management for reporting throughout the year.

To view development plan details on the main screen, click the + icon beside the title.

Click the title of the development plan to open the development plan window. Use the dropdown to select the current Status.

-Click OK when finished.

To add a new development plan, click the Add button.

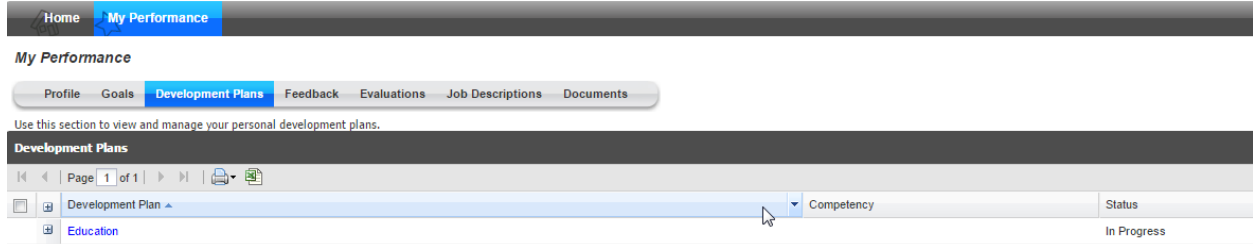
-Enter all the applicable development plan information.

-Click OK when finished.

Finally, while in the Development Plan section, you can click the Options button to display a number of filtering options for the development plans. You can display or hide development plans with certain statuses or based on Dates.

Click the Refresh List button to apply the filters you selected. Click the Options button again to close the filter area.

# JeffSMART User Guide



## Feedback

The feedback tab has 3 options: Add a Journal Note – My Performance, Manager Note and Recognition.

## Journal Note

The Performance Journal area allows you, your Manager, and HR Representative to track your accomplishments throughout the year so that they can be highlighted during future appraisal processes.

To view performance journal note details on the main screen, click the + icon beside the note title.

Click the title of the performance journal note to open the note window.

To add a new performance journal note, click the Add button and complete the fields as required.

-If you would like management and HR to be able to see the note, click the Allow management to view this note checkbox. If left unchecked, only you will be able to view this note.

-Click OK when finished.

Notice that if you choose to allow management to view the note, the text Shared will display in the Sharing column. If you choose to keep the note private, no text will display in this column.

Click the Options button to be able to filter by created or modified date.



## Manager Note & Recognition

The manager has the ability to add manager notes and recognition that can both be shared with the employee.

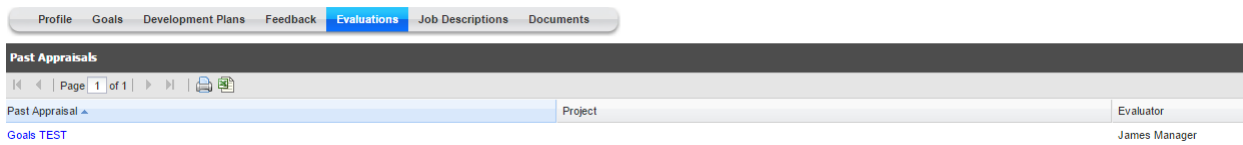
# JeffSMART User Guide



## Evaluations

The Evaluations area allows you to view any of your past appraisals completed within the eAppraisal system.

A list of appraisal processes that you were included in will be listed in the Past Appraisal column. Click the Title link to open the appraisal.



## Job Descriptions

The Job Description section will be automatically populated with your Job Description details for your reference. These sections are not editable. You can view all the different job descriptions that you have been associated with as part of previous performance reviews. You can click on the job description links to view the details.



## Documents

Your manager, HR Representative and the eAppraisal Administrator all have access to import documents they feel are significant to your performance. Imported documents can be viewed at any time in the Documents section.

To view an imported document, click the title link of the document you want to view.