HealthStream Performance Pre-Launch Assessment Assignment Checklist

Provided by HealthStream Operations

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Pre-Launch

A smooth, efficient performance assessment workflow is an outcome desired by many organizations. In an effort to ensure the workflow and assessment cycle will work as expected, completing the pre-launch checklist is recommended.

Completing the checklist will assist administrators in confirming that the assessments are set up as desired and limit the need to edit assessments that have already been assigned.

Employee Accounts		
Task	**Notes**	**Status/Date**
Identify target audience: Employees receiving assessment	All Employees: Yes or No Specific Employees: Additional Details:	☐ Complete Date: ______
Identify Actors (This will help identify assessment settings):	Peers: Raters: Approvers:	☐ Complete Date: ______
Confirm all, applicable, employees have Supervisors *Tip*: Run HealthStream Analytics report *Employees without Supervisor* report		☐ Complete Date: ______
Confirm the Student Group is created following appropriate naming conventions (refer to internal policy/process) *Tip*: Use the *Student Group* report to confirm all applicable students are included	Name of Student Group:	☐ Complete Date: ______
Determine if students and managers will be attaching documents to the assessment. If so, ensure that these		☐ Complete

settings are enabled for students		Date: ______
Assignment(s)		
Task	**Notes**	**Status/Date**
Assignment Timing	Effective Date: Start Date: Due Date: End Date (if applicable):	☐ Complete Date: ______
Identify affiliation/location of assignment (Enterprise/Institution/Department)		☐ Complete Date: ______
Identify assignment naming conventions (Refer to internal policy/process for naming conventions)		☐ Complete Date: ______
Assessment Build		
Task	**Notes**	**Status/Date**
Rating Scale approval received *Note*: It is significant to the success of the assessment cycle to have the Rating Scale(s) identified and approved by Leadership (HR) prior to proceeding with creating/publishing the assessment.	Rating Scale:	☐ Complete Date: ______
Confirm desired categories are created		☐ Complete Date: ______
All Job Descriptions have been created, reviewed and shared as desired		☐ Complete Date: ______
All Statements have been created, reviewed and shared as desired (Refer		☐ Complete

to internal policy/process for statements)		Date: ______
All approved Rating Scales have been created, reviewed and shared		☐ Complete Date: ______
All Resources have been created, reviewed and shared		☐ Complete Date: ______
Performance Assessment has been named following preferred naming convention process		☐ Complete Date: ______
Performance Assessment Directions/Instructions have been reviewed/confirmed		☐ Complete Date: ______
Determine if students will complete a self-assessment as part of the performance assessment cycle		☐ Complete ☐ N/A Date: ______
Approval workflow has been identified and reviewed		☐ Complete Date: ______
Reflective plan settings have been identified and reviewed		☐ Complete Date: ______
Publish the Performance Assessment for TESTING ONLY. Ensure sharing options are set up as desired		☐ Complete Date: ______
Organizational/Divisional/Departmental Goals have been added to the system as a Building Block by the administrator	Identify the assessment templates that will include goals; determine naming convention for different templates based on included Goals, if applicable	☐ Complete ☐ N/A Date: ______

Assessment Testing		
Task	**Notes**	**Status/Date**
Assign the assessment to one or two test employees, for testing		☐ Complete Date: ______
Verify Actor Visibility settings are as desired: • Employee • Peer • Rater		☐ Complete Date: ______
Verify Statements are appearing as expected: • Resources are accessible • Risk/Outcomes and Methods of Validation(s) are set up as desired		☐ Complete Date: ______
Verify Rating Scale calculation is as desired • Section scores • Overall Assessment scores		☐ Complete Date: ______
Verify Approval workflow is set up as desired		☐ Complete Date: ______
Verify Reflective plans are working as expected		☐ Complete Date: ______
Discuss decisions in regard to preferred process if presented with the following situations: 1. Employee's Manager changes 2. Employee is terminated or goes on leave		☐ Complete Date: ______

Once the Assessment Assignment Pre-Launch Checklist has been completed:

- If all settings are as desired, proceed with assigning to applicable employees.
- If some changes to the assessment template are needed, the action required to make the change may vary. When an assessment template is published, some fields are locked down and will require a copy or new template to be created.

CAN Update on Published Assessment -- Assessment will need to be republished	**CANNOT Update on Published Assessment Copy or New Assessment Template required**
• Development Status • Name • Description • Instructions • Category • Actor Settings • Assessment Printing • Assessment Permissions ○ Typically used with assessments created/managed at an enterprise level	• Template Configuration • Assessment Scoring (includes Rating Scale • Enable Approvals • Assessment Template Outline (includes section settings) • Reflective Plan settings

Additional Resources

- Online Help: HealthStream Performance User Guides
- Online Help: Recommended Practices>HealthStream Competency /HealthStream Performance
- Online Help>Document Management