

PeopleFluent Talent Management

26.11 Release Notes

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New to PeopleFluent Talent Management

PeopleFluent is pleased to announce the PeopleFluent Talent Management 26.11 update. PeopleFluent Talent Management 26.11 is released for general availability on November 3, 2026.

This documentation describes the functionality changes in PeopleFluent Talent Management 26.11, including new and updated features. If you have any questions about the enhancements or the new features, please contact your PeopleFluent representative.

Resolved Issues

PeopleFluent Talent Management 26.11 includes a number of bug-fixes and you are encouraged to review them in the Resolved Issues Report.

Document Information

This section lists any changes or updates that occur following initial publication.

Revision Information	
Revision Date:	October 06, 2026
Revised Document Version Number:	1.0
Details of Revision:	Initial publication

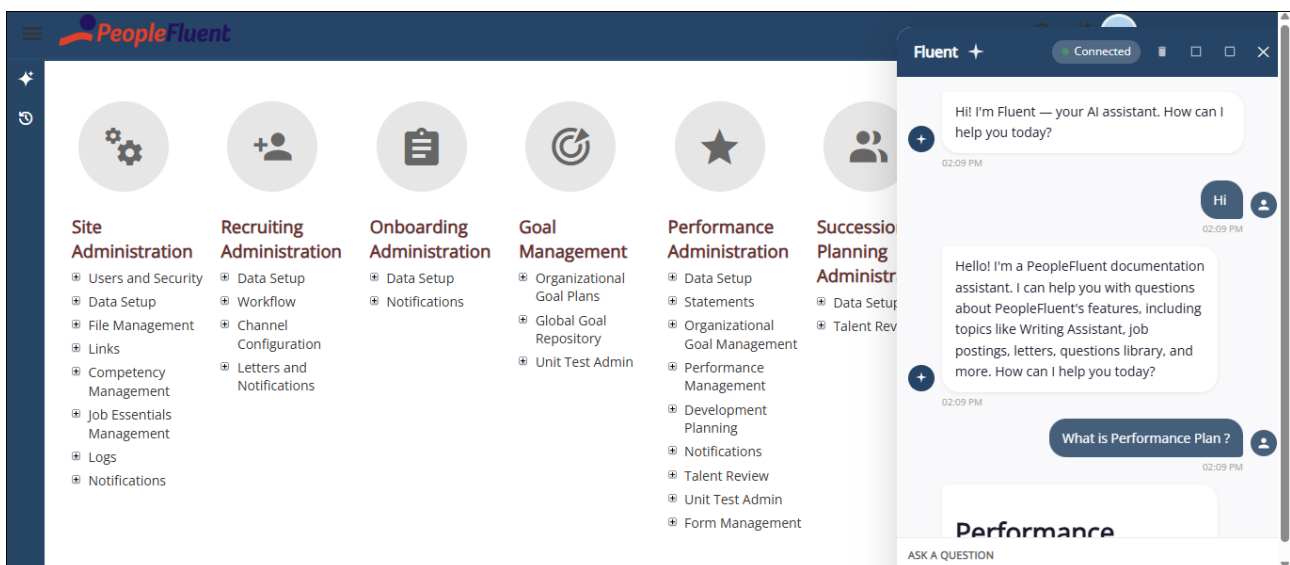
Talent Management AI Assistant - New Functionality

In release 26.07, we introduced the Talent Management AI Assistant (previously called Virtual Assistant), a tool is designed to help users to quickly get information and guidance using natural language processing. We are continuing to develop functionality around the assistant. In release 26.11, we have extended the chat interface to answer questions against customer-specific data sources. Rather than returning only generic product guidance, the assistant can reference the documentation and business rules loaded for a customer, allowing answers reflect how an organization actually uses the application.

 **Focus Area(s):** Talent Management General

 **Activation:** Please contact PeopleFluent to enable and configure the AI Assistant

 **New Permissions:** No new permission related to this feature



New Report Subjects for Worksheet Reports by Matrix Manager Area of Responsibility

Previously, ad hoc reports generated for Matrix Managers shared identical subject titles with standard direct line manager reports, such as *Salary Planning (Focal)*, making them difficult to distinguish. You can now select specific Matrix Manager report subjects during ad hoc report creation, such as *Salary Planning (Focal) Matrix Manager*, to clearly separate matrix responsibilities from direct line reporting.

 Focus Area(s): Compensation, Worksheet Reports, Matrix Manager

 Activation: ON by default

 New Permissions: No new permissions related to this feature

Selecting the Appropriate Subject

1. Go to **Main Menu > Reporting > Create New Report** or **Main Menu > Reporting > Ad Hoc Reports** and select **Create New Report**.
2. On the **New Report Subject** page, expand the **Compensation** section.
3. In the **Compensation Worksheets** section, select one of the following options:
 - **Salary Planning (Focal) Matrix Manager:** To build a report on indirect reports defined by the Matrix Manager area of responsibility from the Salary Planning worksheet.
 - **Bonus Planning (Focal) Matrix Manager:** To build a report on indirect reports defined by the Matrix Manager area of responsibility from the Bonus Planning worksheet.
 - **Stock Planning (Focal) Matrix Manager:** To build a report on indirect reports defined by the Matrix Manager area of responsibility from the Stock Planning worksheet.
 - **Total Compensation Planning Matrix Manager:** To build a report on indirect reports defined by the Matrix Manager area of responsibility from the Total Compensation Planning worksheet.
4. Click **Continue** and configure the report as necessary.

User View of the Subject in the Worksheet Report

When creating a report in a worksheet for indirect reports, the subject will indicate that you are in Matrix Manager view.

New Report Subjects for Worksheet Reports by Matrix Manager Area of Responsibility

✓ Report Subject

2 Column Selection, Filter, and Sort

3 Grouping, Counts, and Display Columns

4 Headers and Footers

5 View Report

Stock Planning (Focal) Matrix Manager - New Report - Column Selection, Filter, and Sort

Help

Tutorial

Name	Salary	Currency	Reward Cycle	Manager	Hierarchy	Stock Plan
Robert Alamar	\$159,300	USD	Single Vehicle	Neil O'Donnell	Neil O'Donnell	Annual Stock Plan
Kristen Ard	\$62,621	USD	Single Vehicle	Patricia Milton	Patricia Milton	Annual Stock Plan
Kimberly Belcher	\$56,529	USD	Single Vehicle	Patricia Milton	Patricia Milton	Annual Stock Plan
Margaret Cottering	\$136,400	USD	Single Vehicle	Chaz Needham	Chaz Needham	Annual Stock Plan
Jason Curtis	\$96,363	USD	Single Vehicle	Derek Yorke	Derek Yorke	Annual Stock Plan
Darrell Damon	\$66,353	USD	Single Vehicle	Robert Alamar	Robert Alamar	Annual Stock Plan
Daffodil Garson	\$63,937	USD	Single Vehicle	Chaz Needham	Chaz Needham	Annual Stock Plan
Patricia Milton	\$63,551	USD	Single Vehicle	Alexandra Toscano	Alexandra Toscano	Annual Stock Plan
Chaz Needham	\$85,933	USD	Single Vehicle	Neil O'Donnell	Neil O'Donnell	Annual Stock Plan
Danielle Newton	\$72,920	USD	Single Vehicle	Robert Alamar	Robert Alamar	Annual Stock Plan

Previous

1

2

Next

(15 total rows)

Jump to page: Go

Rows per page: 10

Cancel

Previous

Continue

New Fields Added to Compensation Statements

In previous releases 23.07 and 24.04, several fields were added to compensation worksheets. However, these same fields were not added to compensation statements. In release 26.11, these fields have updated compensation statements to include the fields.

 **Focus Area(s):** Compensation, Compensation Planning, Reward Cycles
Compensation Statements

 **Activation:** ON by default

 **New Permissions:** No new permissions related to this feature

Details

The **Bonus Award Statement**, **Off-Cycle Bonus Award Statement**, **Salary Increase Statement**, **Off-Cycle Salary Increase Statement**, **Stock Award Statement**, **Off-Cycle Stock Award Statement**, and **Total Pay Statement** now contain the following fields:

- lastIncreaseDate
- jobCode
- timeInJob
- currentStatus
- lumpSumPct
- adjustToMinPct
- totalIncreasePct
- sigKey (Salary Increase and Total Pay Statements only)

Bonus Award Statements, Stock Award Statements and Total Pay Statements previously had *lastIncreaseDate*, *jobCode*, *timeInJob* and *currentStatus* listed under the BonusPlanPayment grid, StockPlanPayment grid, or both for the Total Pay statement. However, those grids are from the IncentivePlanParticipantPayment entity and not from the WorksheetRow entity. For those three statements, you will see the set of four fields listed multiple times depending on the grid.

Ability to Filter, Sort and Audit Worksheet Rows Based on Email Sent

In some cases, you may want to filter, sort or audit worksheet rows based on whether or not an email has been sent to the users. Previously, this was not possible as the existing **Email Statement** field is simply an icon that indicates an email has been sent. In release 26.11, we have added the ability to include a new field, **Email Sent**, that allows this functionality.

In addition to the worksheet, the **Email Sent** field can also be used as an input field within alerts and formulas. The time the email statement icon was clicked is recorded in audit history.

 Focus Area(s): Compensation, Compensation Planning, Reward Cycles, Email Notifications

 Activation: ON by default but requires set up

 New Permissions: No new permissions related to this feature

Enable the Email Sent Field for a Reward Cycle

To include the **Email Sent** field on a worksheet, it needs to be added as a column in the worksheet.

1. In the appropriate reward cycle, select **Column Manager** in the left menu.
2. Locate the **Email Sent** field. Set the visibility field to **Visible**.
3. Edit the column name (optional).
4. Click **Set Visibility**.

Add the Field to the Worksheet UI Configuration

1. Click **Worksheet UI Configuration** in the left menu.
2. In the Planning Worksheet view, click **Set Columns**.
3. Select **Email Sent** in the **Available Columns** column and move it to the **Selected Display Columns** column.
4. Click **OK**.

Allow Auditing of the Email Sent Column

1. Click **Options** in the left menu.
2. In the **Audit History Columns** section, click **Add**.

3. Locate the **emailSent** field. Click the corresponding checkbox.
4. Click **OK**.

Working with the Field in the Worksheet

In the **Email Statement** field, a check mark icon indicates that an email has been sent.

Worksheet Status: ● Awaiting Submissions View: Planning Worksheet View Worksheet for: Tim Ballard Worksheet Proxy View Total Organization

View Summary Select View Show Filters Set Columns Save View Reports Charts Layout Currency Tutorial

Alert		Name	Email Sent	Individual Factor	Salary	Currency	Plan Name	Target %
		Pearl Adams			\$66,273.10	USD	Annual Incentive Plan	10.00
		Sara Performan...			\$64,080.15	USD	Annual Incentive Plan	10.00
		Sasha Successio...			\$71,856.32	USD	Annual Incentive Plan	10.00
		Andy Admin			\$71,523.02	USD	Annual Incentive Plan	10.00
		Adam Hargil			\$98,306.71	USD	Annual Incentive Plan	15.00
		Nadia Marner			\$102,149.34	USD	Annual Incentive Plan	15.00

- Select **Show Filters** to filter on the **Email Sent** field.
- Click the **Email Sent** column header to sort the column.
- Click the Audit History to view the audit of email sent.
- When you export the worksheet to Excel or CSV, the Email Sent exports as TRUE/FALSE, along side.

Fast Export of PDF Statements from Reward Cycle Worksheets

Previously, when bulk downloading statements from a reward cycle worksheet, the .zip file only included the employees listed on the page the user was currently viewing. As of release 26.11, the .zip file will include all employees in the filtered view across all worksheet pages when statements are pre-generated in reward cycle setup.

 **Focus Area(s):** Compensation, Reward Cycles, Worksheets, Statements, Statement Downloads

 **Activation:** ON by default

 **New Permissions:** No new permissions related to this feature

Ability to Pre-Generate and Bulk Export Statements for Off-Cycle Rewards

In release 26.11, we have added the ability to pre-generate reward statements for off-cycle reward cycles, as well as the ability to bulk export them from the worksheet view.

 Focus Area(s): Compensation, Reward Cycle, Off-Cycle, Reward Statements

 Activation: ON by default

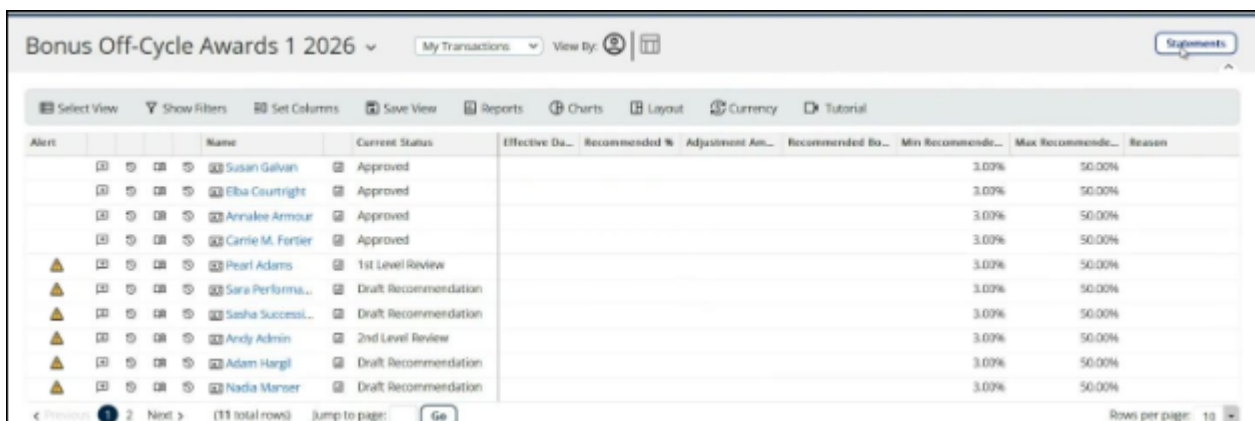
 New Permissions: No new permissions related to this feature

Pre-Generate Reward Statements

1. In the appropriate reward cycle, click the **Worksheet Processing** tab.
2. Click the **Create Pre-Generated Statements** button.
3. Select the population.
4. Click **Process**.

Export Statements from the Worksheet View

The **Statement** button displays at the top of the screen. Making sure the appropriate participant view is active, click the button, then click the PDF icon to export the appropriate statement. Statements are exported as a .zip file with one PDF per employee and a MANIFEST.TXT file listing the contents of the bundle.



Alert	Name	Current Status	Effective Da...	Recommended %	Adjustment Am...	Recommended Bo...	Min Recommende...	Max Recommende...	Reason
	Susan Galvan	Approved					3.00%	50.00%	
	Elba Courtright	Approved					3.00%	50.00%	
	Ariake Armour	Approved					3.00%	50.00%	
	Carrie M. Fortier	Approved					3.00%	50.00%	
	Pearl Adams	1st Level Review					3.00%	50.00%	
	Sara Perfor...	Draft Recommendation					3.00%	50.00%	
	Sasha Success...	Draft Recommendation					3.00%	50.00%	
	Andy Admin	2nd Level Review					3.00%	50.00%	
	Adam Hargl	Draft Recommendation					3.00%	50.00%	
	Nadia Manser	Draft Recommendation					3.00%	50.00%	

Performance Plan Delegation Wizard

When configuring performance plans, you have the ability to delegate responsibilities for distribution of work among multiple individuals. Release 26.11 introduces a wizard for configuring delegations. In addition to the guided wizard workflow, the update includes the following key improvements:

- A required delegatee, with plan selection limited to the employee when defaulting to a plan type.
- A cap on the number of delegations that can be selected at once (100+).
- Guardrails preventing manager-role delegation to an employee and preventing self-delegation.
- Expanded editing of existing delegations, including process type.
- A global delegation timeout setting.
- Automatic removal of delegations when an employee is terminated.
- A required date assignment on every delegation.

There are several system configuration settings that allow you to define the delegation wizard options and their default values.

 Focus Area(s): Performance, Performance Plans, Delegations Activation: ON by default New Permissions: No new permissions related to this feature

Configure the Delegation Wizard on the System Level

You can configure system settings to define the delegation wizard options and their default values.

1. Go to **Administration Home > Performance Administration > Data Setup > Performance Settings**.
2. Locate and configure the delegation fields. The field list displays the current default values for each field. Click the edit icon to change the Value field.
 - **Visible Delegation Types:** Specify which delegation types users can choose from (*Global, Year to Delegate, Plan Specific*).
 - **Default Delegation Type:** Specify which value will be the default option in the Delegation Type field.

- **Default Delegation Process Types:** Specify which processes are pre-selected.
- **Default Delegation Role Types:** Specify which roles can be delegated. This list drives the Role options in the wizard, preventing users from selecting an inappropriate role for delegation.
- **Default Keep Delegator:** Specify which items remain with the delegator by default (*Tasks, Notifications, Reminders*).
- **Max Process Owners per Employee:** Specify the maximum number of process owners that can be added for an employee.

Using the Delegation Wizard

1. In the appropriate performance plan, click **Delegation Options** in the left menu.

Note that this tab appears only if **Will this plan allow the delegation of process roles?** is set to **Yes** on the **Basics** tab.

2. Click **Add**.

3. Configure the screens:

- **Step 1: Select Designation/Plan:** Choose the delegator, role, delegation type, year/plan, process types and keep-delegator options.
- **Step 2: Select Employees:** Select one or more employees to delegate.
- **Step 3: Select Process Owners:** Assign process owner(s) per employee, set delegation start/end dates.
- **Step 4: Review & Confirm:** Review the summary grid and save.

Repeat the steps above to create additional delegations. Click the delete icon on a delegation to delete.

Delegations: Delegating for Robert Alamar

Select Delegation/PlanSelect EmployeesSelect Process OwnersReview & Confirm

Instructions

Review and Confirm

✓ You are managing delegations for Robert Alamar

✓ Role: **Manager**

✓ Delegation Type: **Plan Specific**

Name	↑	Employee ID	Position Title	Manager	Process Owner
 Danielle Newton		000004415092	Manager Quality Assurance	Robert Alamar	Alexandra Toscano

(1 total rows)Rows per page: 10

Previous

Cancel

Save

Performance Plan Workflow Automation

In release 26.11, we are introducing automatic processing for specific tasks in performance plan workflow including:

- Initiating newly eligible employees automatically who become eligible after the process has started.
- Removing employees automatically who are no longer eligible.
- Moving participants to complete automatically.
- Completing the performance process itself once the work is finished with the ability to remove related tasks.

Auto settings are configured per workflow process (Goal Setting, Interim Evaluation, Final Evaluation) and run on a schedule, moving plans through workflow steps based on pre-defined dates.

-
-  Focus Area(s): Performance, Performance Plans, Workflow
 -  Activation: ON by default
 -  New Permissions: No new permission related to this feature
-

Auto Process Setup

Automatic processes are set up per plan in Workflow Process Management.

1. Go to **Administration Home > Performance Administration > Performance Management > Workflow Process Management**.
2. Click the manage icon for the appropriate plan.
3. In the left menu, select the appropriate workflow process.
4. Scroll to the **Auto-Process Settings** section and click **Add**. Configure the auto process.
 - **Enable Process:** Select the checkbox to make the process active immediately. Leaving it unchecked saves the configuration without running it.
 - **Type (Required):** Select the workflow task you would like to automate.
 - **Start Date** and **End Date:** Select the date window during which the process should run.

The Complete Performance Process type does not contain a Start Date option, only an End Date option, which is the date the the workflow will automatically complete.

- **Send Notifications:** Select the checkbox to send email notifications when the process is complete.
- **Remove Tasks?:** Appears only when the **Complete Performance Process** type is selected. Click the checkbox to remove tasks associated with the completed plan.
- **Population Library:** Choose if the auto-processing rule should apply to all eligible employees or to only a subset. If you select **Subset of Eligible Population**, choose the population in the **Select Process Population View** field. To edit the view, select **Edit Process Population Criteria View**.

5. Click **Save**.

6. Repeat these steps to include additional auto processes for the workflow.

Disable or Delete an Automatic Process

- To disable an auto process, click the edit icon and clear the **Enabled** checkbox for the process.
- To delete an auto process, click the delete icon for the appropriate process.

Competencies in Performance Plan Goal Forms

In release 26.11, we have added the ability to include a **Competencies** section in performance plan goal forms. This allows employees to track competencies, comments and feedback alongside their goals year-round, rather than just during review periods.

- 🎯 Focus Area(s): Performance, Goal Forms, Competencies
- ⚡ Activation: ON by default but requires set up
- 🔑 New Permissions: No new permissions related to this feature

⚡ Enabling and Adding the Competencies Section

Be sure you have assigned a workflow process in the **Goal Setting Process** tab so the Goal Form tabs are available.

1. In the appropriate performance plan, click the **Basics** tab. In the **Basics** section, locate the **Add Competency for Goal Setting** field and click **Yes**.

This field also manages another new feature in 26.11, please see [Enable Plan Competencies During Goal Setting and Allow Feedback](#) for additional information.

2. Click **Save**.
3. Select the appropriate Goal Form from the left menu (**Employee Goal Setting Form, Manager Goal Setting Form, etc.**).
4. Click the main **Actions** menu for the form and select **Configure form sections**.
5. Click **Add Section**.
6. Click the **Competencies** option.
7. Click **OK**. The section is added and can be configured as necessary.

Enable Plan Competencies During Goal Setting and Allow Feedback

In release 26.11, we have added the ability to enable competencies in the feedback form for a performance plan during goal setting. This allows reviewers to provide feedback for the competencies in the form year-round, without waiting for interim or final evaluation.

 Focus Area(s): Performance, Performance Plans, Competencies, Goals

 Activation: ON by default but must be enabled for a performance plan

 New Permissions: No new permissions relate to this feature

Enable the Setting in the Performance Plan

1. In the appropriate performance plan, click the Basics tab.
2. In the **Basics** section, locate the **Add Competency for Goal Setting** field and click **Yes**.

This field also manages another new feature in 26.11, please see [Competencies in Performance Plan Goal Forms](#) for additional information.

3. Click **Save**.

Viewing and Providing Feedback in the Form

When the setting is enabled, the feedback form will display associated competencies. Historical feedback data (if any) is displayed with the competencies. Here, you can rate the competencies from within the feedback.

Expanded AI Writing Support for Performance Evaluation and Goal Forms

Previously, the AI rewrite feature was only available for specific comment fields in performance plan forms. In release 26.11, we have expanded this functionality. The AI rewrite feature can now be enabled for all text areas/rich text fields across the performance forms.

Key changes include:

Updated Interface: The "Rewrite" button has been replaced with a compact icon. The redesign also introduces a side-by-side comparison popup showing the original text and the suggested text together.

Contextual Guidance: Users can toggle "Rewrite guidance" to automatically incorporate record context, such as goals, competency ratings, and talent assessments, into the prompt using Velocity merge fields.

Text Refinements: Post-generation, refinement options allow users to adjust suggestions (Shorten, Formal, Elaborate, Refine).

Field-Specific Output: Plain Text Area fields now return text without formatting to preserve line breaks and lists, preventing HTML tags from appearing in standard text boxes.

 Focus Area(s): Performance, Performance Plans, Evaluation Forms, Goal Forms

 Activation: Please contact PeopleFluent to have this feature enabled

 New Permissions: No new permissions related to this feature

Enable Form Fields for AI

1. In the appropriate performance plan, select a form in the left menu. **Note:** This feature is not available for **Cascade Goal** forms or **Goal Copy** forms.
2. Locate the appropriate field and open it for editing.
3. Click the **Enable AI** checkbox.
4. Click **Save**.

The screenshot shows a software interface for configuring goal forms. A modal dialog titled "Edit Field Properties - Expected Res..." is open, allowing configuration for a field named "Expected Result".

Form display name: Set Goals

Section: Goals

plans.

Field Properties:

- Editability:** Read/Write
- Field Label:** Expected Result
- Field Level Help Text:** Indicates the result required for successful completion of this goal.
- Show Audit History:** ☐
- Enabled AI:** ☐

Buttons: Cancel, Save

Background Interface:

- Form display name:** Set Goals
- Section:** Goals
- Goal Title:** [Icon]
- Goal Category:** [Icon]
- Goal Weight:** [Icon]
- Expected Result:** [Icon]
- Alignment:** [Icon]
- Development:** [Icon]
- Goal Weight:** 50%
- Date:** 04/28/2010 (MM/dd/yyyy)

AI Performance Context

In release 26.11, we are introducing AI Performance Context. This functionality allows you to generate employee performance summaries from historical reviews and recent feedback. Reviewers can access talent profiles, goals, feedback, and prior reviews directly within the evaluation form via an AI summary or a side-by-side split window. Additionally, the integrated chat interface provides instant access to specific records on demand, such as previous goal comments or talent assessment data.

 **Focus Area(s):** Performance, Talent Assessments, Goals, Evaluation

 **Activation:** Please contact PeopleFluent to have this feature enabled

 **New Permissions:** No new permissions related to this feature, however new Authorities must be assigned to a role in order to expose it to users

Assign the Role Authorities

1. Go to **Administration Home > Site Administration > Users and Security > Roles**.
2. Locate the appropriate role and click the edit icon .
3. Click the **Authorities** tab in the left menu.
4. Click **Add**.
5. Locate and assign one or more of the following Authorities:
 - **Can Access Performance AI Context:** Roles with this authority can use the Performance AI context on assessment forms.
 - **Can Access Goal Setting AI Context:** Roles with this authority can use the Goal Setting AI context on goal setting forms.
 - **Can Access Talent Profile AI Context:** Roles with this authority can use the Talent Profile AI context.

Usage Examples

Talent Profile

The screenshot displays the 'Talent Profile' page for Joe Anton. The left sidebar contains navigation links: Personal Information, Current Position & Organization, Compensation, Work History, Education & Skills, Experience Inventory, Resume & Attachments, Performance, Feedback, Mobility & Travel, Development (selected), Journal, Talent Assessment, Career Plan, and Succession Plan. The main content area is titled 'Competency Gap' and 'Current Development Activities'. It includes a summary table for development activities, which is currently empty. Below this is a section for 'Licenses and Certifications'. On the right, an 'AI Help Assist...' chat window is open, showing a conversation about the user's talent profile and development activities. The chat window includes a 'Documents' tab, a 'Talent Profile' tab, and a 'TRY ASKING' section with suggested questions. At the bottom of the page, there are buttons for 'Spell Check', 'Print', 'Statements', and 'Save'.

Goal Setting Form

The screenshot displays the 'Set Goals' page for Michelle Frasier. The top navigation bar shows the user's name, 'Employee: Michelle Frasier', and the 'Select a Plan' dropdown set to 'Annual Performance Appraisal 2025-2025'. The 'Review Period' is '01/25/2025 - 12/31/2025'. A progress bar at the top indicates the current step: 1. Employee Sets Goals (In Progress), followed by 2. Manager Review, 3. Track Goal Progress, and 4. Completed. The main content area is titled 'INSTRUCTIONS' and provides guidance on how to set goals. Below this, a 'Collapse Group' button is visible. The goal setting form includes a 'Goal Title' field with the text 'Reduce hospital-acquired infections (HAI) by 15%', a 'Measure' dropdown set to 'Internal', and a 'Goal Weight' field set to '25%'. The 'Expected Result' field contains the text 'Reduce hospital-acquired infection rate 15% versus the prior calendar year through consistent infection-prevention practice, isolation compliance, and unit-based huddles'. The 'Due Date' field is set to '12/31/2026'. On the right, an 'AI Help Assist...' chat window is open, showing a conversation about the user's goal setting process. The chat window includes a 'Documents' tab, a 'Goals + Talent' tab, and a 'TRY ASKING' section with suggested questions. At the bottom of the page, there are buttons for 'More Actions', 'Save', and 'Submit'.

Evaluation

Interim Evaluation Review

MF

Employee: Michelle Frazier

Select a Plan: Annual Performance Appraisal 2025-2026 - Cycle 1

Review Period: 01/01/2026 - 06/30/2026

Quick Jump Menu

Employee Information

Overview

Goals

Competencies

Talent Assessment

Job Essentials

Overall

Measure: Percent of admissions with med-rec completed within 24 hours; chart-audit sample each quarter.

Due Date: 12/31/2026

Actual Results:

Alignment: Align With Organizational Goals

Development Activities: [Add Activities](#)

Meet Joint Commission documentation standards on chart audits

Weight: 15%

Goal Title: Meet joint Commission documentation standards on chart audits

Goal Category: Financial

Weight: 15%

Expected Result: Achieve at least 95% compliance on quarterly joint Commission documentation chart audits

Emp: Self R

Emp: Com

Man: Rating

Emp:

AI Help Assistant +

Document Performance + Talent

Michelle Frazier - 9/4/2026, 11:55:16 AM

Note: This is the only overall rating gap in your evaluation. Your other competency ratings (like **Communication** and **Clinical Documentation Accuracy**) show perfect alignment (gap of 0.0), which suggests strong self-awareness in those areas.

Sources: Overall Action Complete Action Required (Employee Self Rating, Manager's Rating, Gap)

12/08/2026

FOLLOW UP

In my 'Competencies (10) Action Complete Action Required' section, where I showed perfect alignment with my manager on Communication and Clinical Documentation Accuracy, what specific competencies am I rating myself lower on compared to my manager, and how do those gaps compare to the 1.0 point gap in my Overall rating?

Looking at my 'Goals (5) Action Complete Action Required' section, are there goals where I'm underestimating my progress or completion status similar to how I underestimated myself in the Overall rating, and what would closing those gaps mean for my goal achievement?

In my 'Development History' and 'Current Development Activities' sections, what development priorities or growth areas have I identified that might explain why I'm rating myself more conservatively than my manager in the Overall Action Complete Action Required section?

ASK A QUESTION

Ask a question about your documents...

More Actions Feedback Save Reopen Complete

Performance Plan Formula AI Assistant

Performance plan formulas are written in a scripting syntax that few administrators use often enough to remain fluent. As a result, writing formulas is typically one of the slower, more error-prone steps in plan configuration.

The Formula Assistant adds AI support directly inside the formula editor, allowing administrators to describe a calculation in plain text rather than recalling exact syntax.

It works alongside existing authoring tools rather than replacing them. Standard validation remains unchanged: Syntax Check and the Test Suite evaluate AI-assisted formulas just as they do hand-written ones.

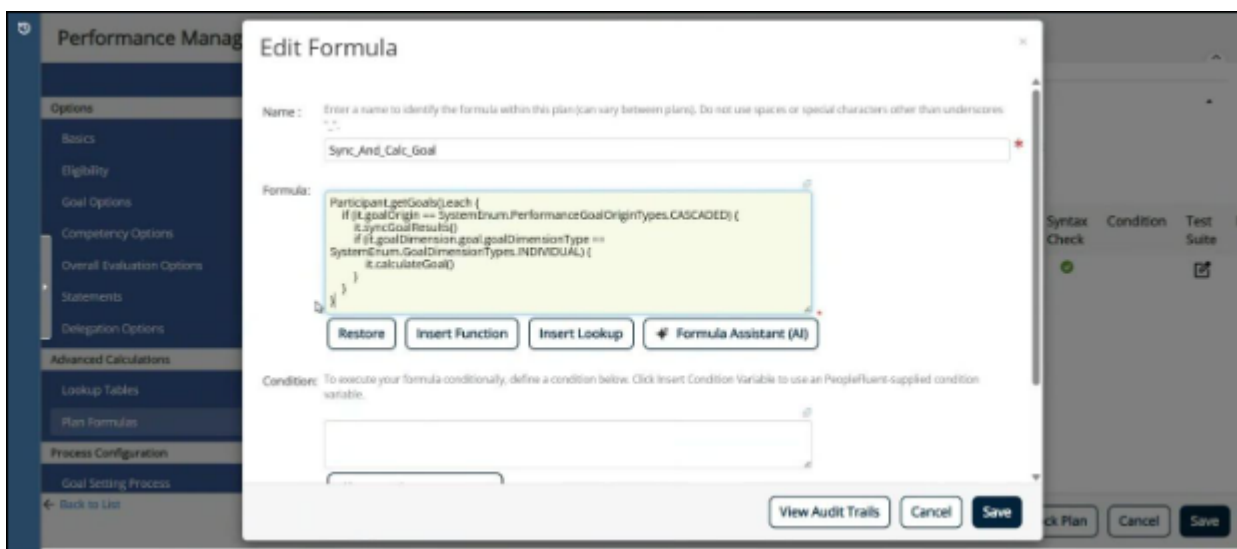
🎯 Focus Area(s): Performance, Performance Forms, Formulas, Formula Editor

⚡ Activation: Please contact PeopleFluent to have this feature enabled

🔑 New Permissions: No new permissions related to this feature

Using the Assistant

1. In the appropriate plan, select **Plan Formulas**.
2. Add a new formula or open an existing formula for editing.
3. Click the **Formula Assistant AI** button to generate an AI formula.
4. Refine the formula as appropriate.



Specify Performance Plan Population Threshold Percentage

In the case that incorrect eligibility criteria is configured for a performance plan, the system may trigger an initiation with a large population, that cannot be stopped once it is started. To help prevent this, we have added a new setting that allows you to set a percentage of your total active user population. If the run exceeds your specified threshold percentage, the initiation is automatically canceled and logged as an error, preventing unintended mass assignments.

 Focus Area(s): Performance, Performance Plans, Plan Eligibility, Plan Initiation

 Activation: ON by default

 New Permissions: No new permissions related to this feature

Configure the Threshold Percentage

By default, the setting is configured for 100%. To update the setting:

1. In the appropriate performance plan, click the Basics tab and locate the **Threshold Population Percentage** section.
2. Enter the correct percentage in the field.
3. Click **Save**.

It is best practice to set the threshold a little above the largest legitimate single run for the plan. A plan that normally initiates a third of the workforce needs a higher ceiling than one that adds a handful of new hires each month, and a threshold set too tight will block valid initiations.

What Happens when the Threshold is Exceeded?

If the projected population exceeds the threshold, initiation stops and an error is logged. The log details the attempted participant count, the percentage of the total workforce it represents, and the plan's configured threshold limit.

Ability to Stop Background Performance Plan Processes

In release 26.11, we have added the ability for specific roles (with the appropriate security group assigned) to manually stop performance plan background processes. In the event that a process was launched in error, or needs to be halted for other reasons, the process can be stopped by these role users.

-  Focus Area(s): Performance, Performance Plans, Workflow Processes
-  Activation: ON by default
-  New Permissions: <text>

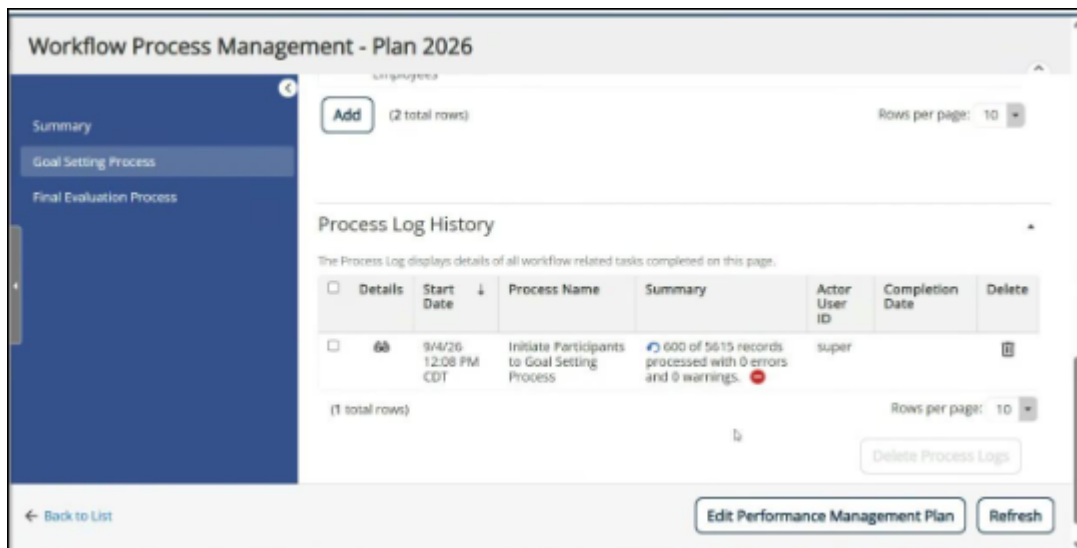
Assign the Security Group to a Role

In order to be able to stop processes, a user's role must be assigned the **Can Stop Performance Processes** security group. It is assigned by default to the Performance Administrator and Super Administrator roles but can be assigned to additional roles.

1. Go to **Administration Home > Site Administration > Users and Security > Roles**.
2. Locate the appropriate role and open it for editing.
3. Click the **Security Groups** tab.
4. Click **Add**.
5. Locate and select the **Can Stop Performance Processes** security group.
6. Click **OK**.

Stopping a Process

1. Go to **Administration Home > Performance Administration > Performance Management > Workflow Process Management**.
2. Click the manage  icon for the appropriate plan to open it.
3. Select the appropriate process from the left menu and scroll to **Process Log History**.
4. When the process is running a stop control displays in the **Summary** column.
5. Click the stop control. Enter a comment to record why the process was halted. The system will complete the chunk it is currently processing and then terminate the operation.
6. Click the icon in the **Details** column for the log row to see the per-participant entries and confirm exactly where the process stopped.



Important! Stopping a process stops only that processes. If multiple processes are configured to automatically run in sequence, stopping a process will not stop subsequent processes. Each process must be stopped individually.

Update Cascading Goal Targets & Results for Newly Eligible Employees

When a performance plan is configured to cascade individual goals, participants are added to the **Targets & Results** tab of the goal when the plan is initiated. Previously, participants who became eligible and were added to a plan after the initial launch were missing from this tab. This caused errors and required a manual workaround to add them. In release 26.11, we added a new plan setting that automatically adds newly eligible individuals to the Targets & Results tab before their plan is initiated.

-  Focus Area(s): Performance, Performance Plans, Cascading Goals
-  Activation: ON by default but must be enabled for the performance plan
-  New Permissions: No new permissions related to this feature

Enable the Setting in the Performance Plan

The steps below assume that the **Does this plan support cascading goals?** field on the **Goal Options** tab is set to **Yes**.

1. In the performance plan, click the **Cascading Goals** tab in the left menu.
2. Click the **Automatically add individuals to Targets & Results tab** checkbox.
3. Click **Save**.

Newly eligible employees will be added to the Targets & Results page prior to initiation.

Override Email Summaries for Manual Workflow Notifications

You can configure a performance plan to group task and workflow status notifications into a summary email, rather than sending separate emails for every change. Previously, you could only override this setting for automatic notifications, allowing them to send immediately instead of waiting for the digest. Manual notifications sent from a workflow state could not bypass the summary digest. In release 26.11, we added a workflow setting that allows manual reminders to be sent immediately as well.

 Focus Area(s): Performance, Performance Plans, Notifications

 Activation: ON by default

 New Permissions: No new permissions related to this feature

Configure the Workflow State

The steps below assume that the **Send Tasks and Notifications in Summary Digest?** field on the **Basics** tab of the plan is set to **Yes**, and that the workflow state is configured to send manual reminders.

1. In the performance plan, choose the process configuration in the left menu (Goal Setting Process, Interim Evaluation Process, Final Evaluation Process).
2. Click the wrench icon  for the appropriate workflow state and select **Configure Reminders**.
3. In the **Manual Reminder Email Summary** section, click the **Override Email Summary for Manual Reminders:** checkbox.
4. Click **Save**.

Letter Template Drop-Down Field Sorting Fix

Previously, the letter template drop-down fields presented options in an unpredictable order, forcing administrators to scan the full list to find the appropriate template. In 26.11, this has been fixed so that templates display in alphabetical order.

-
-  Focus Area(s): Recruiting, Templates, Letter Templates
 -  Activation: ON by default
 -  New Permissions: No new permissions related to this feature
-

Data Feeds and APIs

This section describes changes made to data feeds and APIs. For more information on data feeds and flat files, refer to the PeopleFluent Talent Management 26.11 Control Data Guide and the PeopleFluent Talent Management 26.11 Data Mapping Guide.

Changes to Existing Data Feeds and APIs

The PeopleFluent Talent Management API has been updated to v1.38.261100.

Summary of Changes

Data Feed	Description
Performance Delegation Clear Performance Delegation	The <code>`IsGlobal`</code> boolean element has been removed and replaced by the <code>`DelegationType`</code> enumeration (<code>`Global`</code>, <code>`YearToDelegate`</code>, <code>`PlanSpecific`</code>). - A new optional <code>`YearToDelegate`</code> element (<code>`xs:int`</code>) has been added to support delegating across all processes for a given year (required only when <code>`DelegationType`</code> is set to <code>`YearToDelegate`</code>). - The <code>`Process`</code> element is now optional and ignored when <code>`DelegationType`</code> is <code>`YearToDelegate`</code>. - The <code>`PerformancePlan`</code> element is now required only when <code>`DelegationType`</code> is set to <code>`PlanSpecific`</code>.

New Data Feeds and APIs

This update does not include any new data feeds or APIs.

Additional Documentation Resources

The following additional documentation resources are available:

Documentation	Description
Hardware and Software System Requirements	Available on Customer Community. Provides information on workstation requirements, recommended and supported browsers, and supporting third-party applications.
Online Help	Available in the Talent Management application. Provides help content for administrators and end users.
Resolved Issues	Available on Customer Community. Provides information about resolved issues addressed in this update.
Training Manuals and eLearning Modules	Please contact your PeopleFluent representative to schedule training.

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