SuccessFactors Performance Assessments
Step-by-Step Process
Performance Period 1.1.19 – 4.30.2020

1. Manager Sets up Employee’s 2019-2020 SuccessFactors Performance Assessment
   A. Manager sets up the employee’s performance assessment by ensuring the goals and competencies sections are weighted appropriately and that the employee’s current goals are populated in the assessment.
   B. Refer to the Supervisor: Set Up the Performance Assessment – QRG for detailed instructions.

   A. If employee chooses not to do a self-assessment in SuccessFactors this step may be skipped.
   B. Refer to the Employee: Complete Self-Assessment – QRG for detailed instructions.

   A. Gather documentation/materials to assist with writing the performance assessment
      • Major accomplishments and projects, committee involvement, professional development, etc.
   B. Review employee’s SuccessFactors self-assessment (if applicable)
   C. Evaluate employee’s performance taking into consideration the essential duties and responsibilities of the position. Provide specific examples for each goal and competency rating.
   D. Refer to the Supervisor: Evaluate an Employee’s Performance – QRG for detailed instructions.

4. Manager Conducts 1:1 Meeting Performance Assessment Meeting (5/1 – 5/22)
   A. Meet one-on-one with employee to deliver performance assessment.
   B. Refer to the Tips for a Successful Performance Discussion – QRG

5. Manager Finalizes Employee’s SuccessFactors Performance Assessment and Submits
   A. Manager enters overall comments on the SuccessFactors performance assessment.
   B. Manager submits SuccessFactors performance assessment to employee for signature and acknowledgement.
   C. Refer to the Supervisor: Finalize Employee’s Performance Assessment – QRG for detailed instructions.

6. Employee Electronically Signs and Acknowledges the Performance Assessment
   A. Employee enters overall comments, electronically signs and acknowledges the assessment.
   B. Refer to the Employee: Sign and Acknowledge Performance Assessment – QRG for detailed instructions.

7. Set Up Employee’s SuccessFactors Goal Plan for 2020-2021 Performance Period (May)
   A. Manager creates Employee’s Goal Plan for next performance period.
   B. Refer to the Supervisor: Set Up Employee’s Goal Plan – QRG for detailed instructions.

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