

# SuccessFactors Performance Assessments

## Step-by-Step Process

### Performance Period 1.1.19 – 4.30.2020

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- 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.
  
- 2. Employee Completes 2019-2020 SuccessFactors Self-Assessment (3/2 – 3/13)**
  - 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.
  
- 3. Manager Evaluates Employee's 2019-2020 Performance in SuccessFactors (3/16 – 4/3)**
  - 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