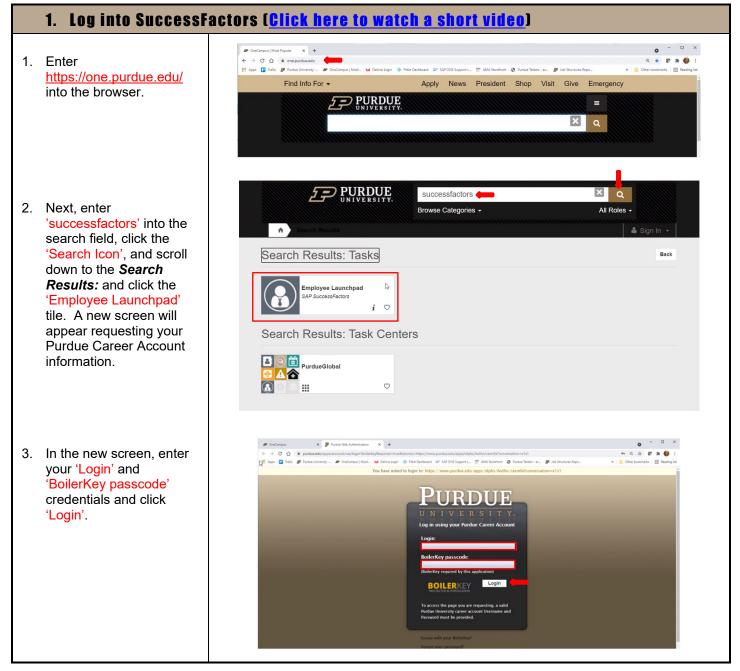


Contents

- 1. Log into SuccessFactors (pages 1 2)
- 2. Access my assessment form (pages 3 4)
- 3. Understand the performance assessment form (pages 5 7)
- 4. Add new goal(s) as appropriate (pages 8 10)
- 5. Enter goal ratings and comments (page 9)
- 6. <u>Enter competency ratings and comments</u> (page 10)
- 7. Submit my self-assessment to supervisor (page 11)
- 8. <u>Acknowledge and sign the assessment</u> (pages 12-13)
- 9. Establish the future goal plan (page 14)
- 10. Establish skills and career goals (page 15)





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Quick Reference Guide

Annual Performance Assessment (employee)

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Annual Performance Assessment (employee)

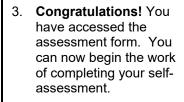
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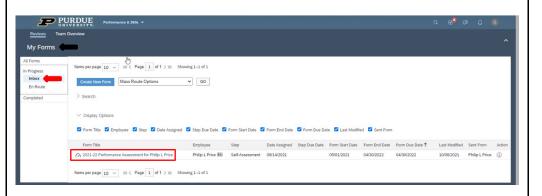
2. Access my assessment form (<u>Click here to watch a short video</u>)

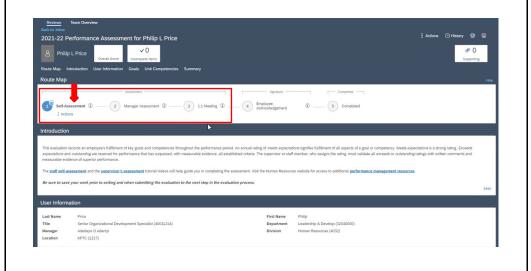
 Navigate to the SuccessFactors landingpage. Click the 'Home' drop-down menu. Next, click the 'Performance & 360s' link and the *My Forms* Screen will appear.



- 2. Once on the **My Forms** page, click 'Inbox'. This will customize how assessments appear on your screen.
- Next, scroll down and identify which assessment to open. Click the 'Form Title' name to open a specific form.







PURDUE UNIVERSITY.

Quick Reference Guide

Annual Performance Assessment (employee)

- 4. Here are some additional tips for accessing forms on the *My Forms* page.
- Review the **My Forms** navigation tabs on the top left-side of your screen.
- Click the 'All Forms' tab to access past and present forms assigned to you.
- Click the 'Inbox' to access assessment forms requiring your action.
- Click the 'En Route' tab to view assessment forms requiring the actions of others.
- Click the 'Completed' tab to access completed assessments appearing in your completed tab.

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	Items per page 10 ~ « < Page 1 of 1 > ») Sho	wing 1–1 of 1								



Annual Performance Assessment (employee)

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3. Understand the performance assessment form

- Become familiar with the 'Print', 'Save', and 'Attach Document' functionality appearing in the top right-side of the screen. (Attend a <u>webinar</u> or visit <u>Performance</u> <u>Management @</u> <u>Purdue (videos)</u> to learn more about these and other functions)
- 2. Become familiar with the six 'Navigation Tabs' on the top leftside the screen. Use each tab (Route Map, Introduction, User Information, Goals, Unit Competencies, and Summary) to quickly access sections of the assessment form.
- Use 'Route Map' tab to identify the location of the assessment form.
- Use 'Introduction' tab to view basic guidance for completing the evaluation and to access on-demand resources.

- Use 'User Information' tab to view relevant position data.

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expectations is	n records an employee's fulfilment of key goals and competencies throughout the performa s a strong rating. Exceeds expectations and outstanding are reserved for performance that h ceeds or outstanding ratings with written comments and measurable evidence of superior parts	as surpassed, with measurable e			
The <u>staff self-</u>	assessment of walandarus a stange with interference of a second pro- assessment and the supervisor's assessment utorial videos will help guide you in comple ve your work prior to exiting and when submitting the evaluation to the next step in th	eting the assessment. Visit the Hu	man Resources website for	access to additiona perform	ance management resources.
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Manager	Veronica A Schirm HCRS (2856)		onors College (4041)	20. 20.	



Annual Performance Assessment (employee)

- Use 'Goals' tab to navigate to the section, review HR guidance, and access resources.
 Use 'Add Goal' button to enter new goals as appropriate.
 Use the 'Edit Section Weight' functionality only when given specific direction by HR or senior leadership to make changes.
- Use 'Pencil' icon tab to edit existing criteria. Use the 'Question Mark' to view rating scale. Use 'Rating Dropdown Menu' and enter a rating. Enter 'Employee Comments' into the open field.

Use 'Unit

Competencies' tab to navigate to the section and review HR guidance. Use the 'Edit Section Weight' functionality only when given specific direction by HR or senior leadership to make changes.

Use 'Behavior Anchor Rating Scale'

to view HR guidance and gain a deeper understanding of the four competencies 'Culture and Values', 'Overall Job Performance', 'Profession/Career Development', and 'Supervision'.

tion User Information Goals Unit Competenc

als (75.0%) 🥒

Accountability for goal establishment rests with the supervisor. The supervisor ensures annual performance goals are entered correctly into SuccessFactors and are visible on the annual evaluation. The Purdue Guide for Creating Goals video explains the University's approach for establishing goals and examining the quality and effectiveness of a goal. Additional annual evaluation tutorial videos are available on the Human Resources website.

An annual rating of meets expectations signifies fulfilliment of all aspects of a goal. Meets expectations is a strong rating. Exceeds expectations and outstanding are reserved for performance that has surpassed, with measurable evidence, all established criteria. The supervisor or staff member, who assigns the rating, must validate all exceeds or outstanding ratings with written comments and measurable evidence of superior performance.



uction User Information Goals Unit Competencies Summary

Unit Competencies (25.0%) / edit section weight

Competencies assess the employee's fulfilment of overall job performance, professional development, culture and values, and supervision expectations (when applicable). An annual rating of meete expectations signifies fulfilment of all aspects of a competency. Meets expectations is a strong rating. Exceeds expectations and outsfanding are reserved for performance that has surpassed, with measurable evidence, all established criteria. The supervisor staff member, who assigns the rating, must validate all exceeds or outstanding rating with written comments and measurable evidence of superior performance. Supervisors and staff who desire additional clarity and assistance in assessing competencies can utilize the <u>behavior anchor examples</u> termine competency fulfilment.

Writing Assistant

Culture and Values

Employee Comments

Demonstrates ability to maintain positive relationships that enr transparency, and impactful work.

 Rating ⑦

 Select a rating...

B I <u>∪</u> | :: :: :: :: :: | *P* | ≪ Size <u>∨</u> | Az ≜ |



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Annual Performance Assessment (employee)

 Use 'Summary' tab to navigate to the section. View a 	Route Map Introduction. User Information Gravita Unit Competitation Elemenary Summary The supervisor will use this summary section to globs the one on one semual review discussion and reduit the summary during the mest discussion meeting.	
snapshot of all goals	Name	Weight
and competencies	Goets	75.0% of total score
	Faculty Stamup Funding	20.0%
appearing on the	Business Area Surplus/Deficit	30.0%
form.	Financial Management Training	15.0%
	Business Area Cash Flow Projection	10.0%
	Training and Development	10.099
	Fiscal Approver Delegation	15.0%
	Unit Competencies	25.0% of total score
	Culture and tables	
	Overall Job Performance	
	Professional / Garreer Development	
	Supervision (Only rate supervisors against this competency.)	
	Overall Comments on Annual Performance Assessment Subjects Comments. There excellent and a contract is provide outliar-data per potential castomer and the webling tender, and finding new ways of "Song business as usual." There had the the excellent and the contract is provide outliar-data and an excellent and the event of the ev	



Quick Reference Guide

Annual Performance Assessment (employee)

	4. Add new goal(s)	as approprate	
1.	Click 'Goals' and navigate to the section. Next, click 'Add Goal' tab and select the 'Add Goal' option. A <i>Create a</i> <i>New Goal</i> screen will appear.	The Purdue Guide for Creating Goals video explains the University's approach for establishing goals and examining the quality and effectiveness of a goal. Additional annual select a go available on the Human Resources website. From Kris	+ Add Goat ew goal from scratch or val from goal library ten's Goal Plan ng goal from Kristen's its and measurable Less
-	Once on the Create a New Goal screen, click 'Blank Goal' and a new screen will appear allowing you to enter goal criteria. (watch a short video)	Create a New Goal Choose what type of goal to add. Blank Goal Personal Goals allow you to make up your own goal and assign any metrics you want. Sample Goal Library Goals are selected from an organized library with suggested metrics. Cancel	
2.	Staff are encouraged to work with their supervisors to enter criteria into all fields appearing on the goal plan. However, 'Goal Name', 'Weights', 'Start Date', and 'Due Date' are the only required fields. Lastly, be sure to	Fields marked with * are required. Visibility: Private * Goal Name*: Faculty Startup Funding Description: Improve faculty unrestricted funds / startup funding in FY21 and plan for in FY22, FY23 contributions Metric: - Accuracy of Projections - Timeliness of Budget Preparations and Disbursements - Quality of Guidance	
-	click the 'Save Changes' button after entering the goal criteria. Data will be lost if the save changes button is not clicked. View the <u>Purdue</u> <u>Guide for Creating</u> <u>Goals video</u> (5 minutes) for additional support.	• Weight: 20.0 % • Start Date: 05/01/2020 • Due Date: 04/30/2021 % Complete: 100.0 % Status: On Track Comments: None	Charges



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Annual Performance Assessment (employee)

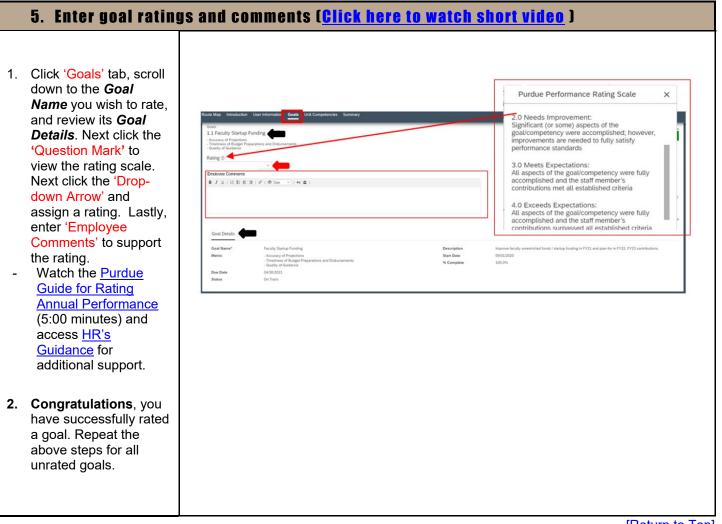
3. Congratulations , you have successfully added a new goal to your goal plan. The goal will also appear on your assessment form. Repeat the above process to add additional goals.	- Quality of Guidance Rating ① 3.0 - Meets Expectation Manager Comments	Funding 2 12		.20.9% of tool score Gentrad
additional goalo.	Goal Name* Metric Due Date	Faculty Startup Funding - Accuracy of Projections - Timikiness of Biology Preparations and Disbursements - Quality of Quiddince 04/30/2021	Description Start Date % Complete	Improve faculty unrestricted funds / startup funding in FY21 and plan for in FY22, FY23 contributions. 05/01/2020 100.0%
	Status	On Track		
				[Return to Top]

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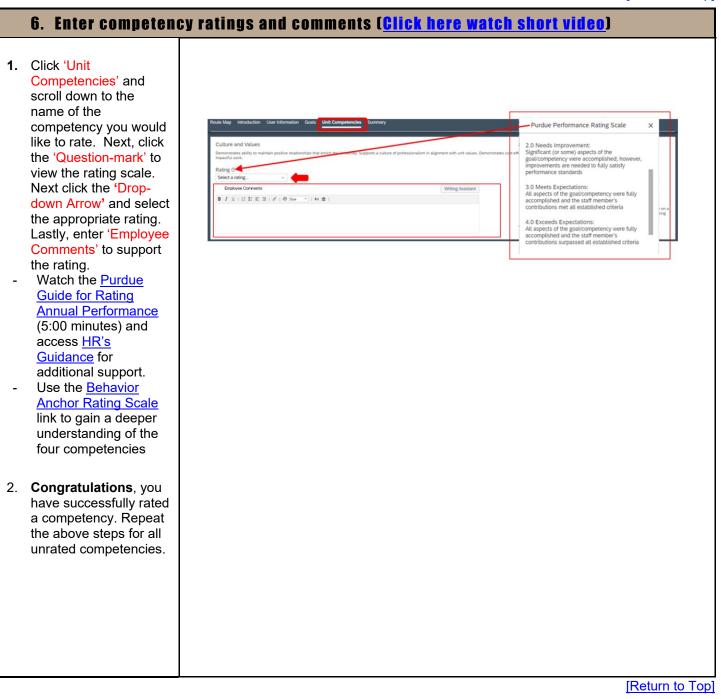
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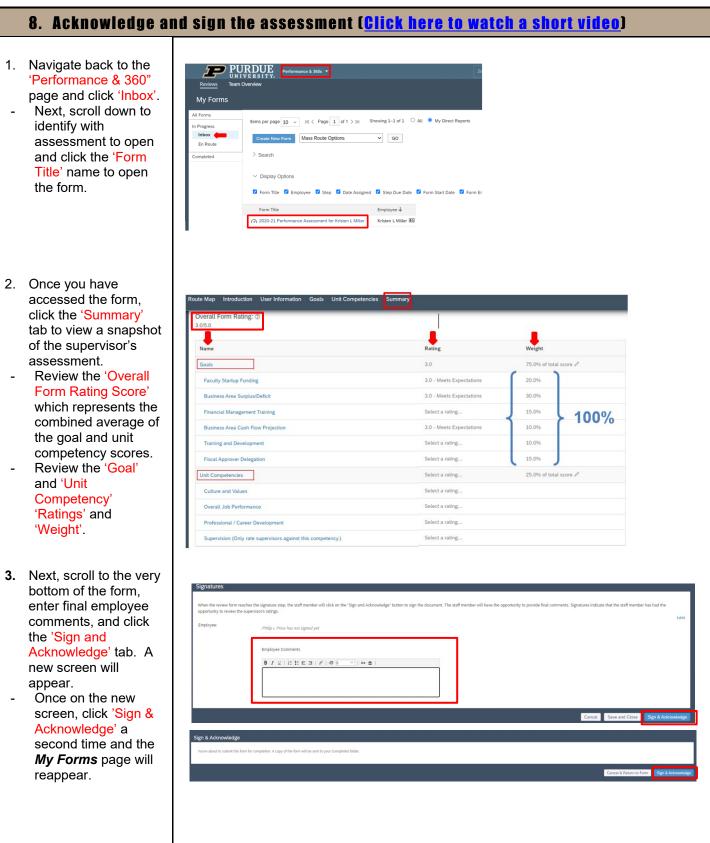
7. Submit my self-assessment to supervisor

- 1. Click 'Summary' and navigate to the section. View a snapshot of all goals and competencies appearing on the assessment form.
- Add the goal weights together. *A cumulative goal weight of 100%* is **required** prior to submitting the assessment to the next step. A cumulative goal total above or below 100% will result in an error message when attempting to advance the form.
- 2. Next, scroll to the very bottom of the form and click 'Submit to Manager for Review' and a new screen will appear.
- Once on the new screen, click 'Submit to Manager for Review' a second time and the *My Forms* page will appear.
- 3. Congratulations! You have sent your selfassessment to your manager. The form now appears in your 'En Route' tab showing action is required by your supervisor.

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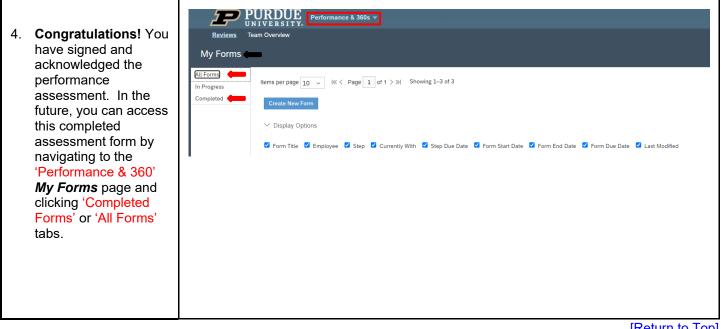


Annual Performance Assessment (employee)





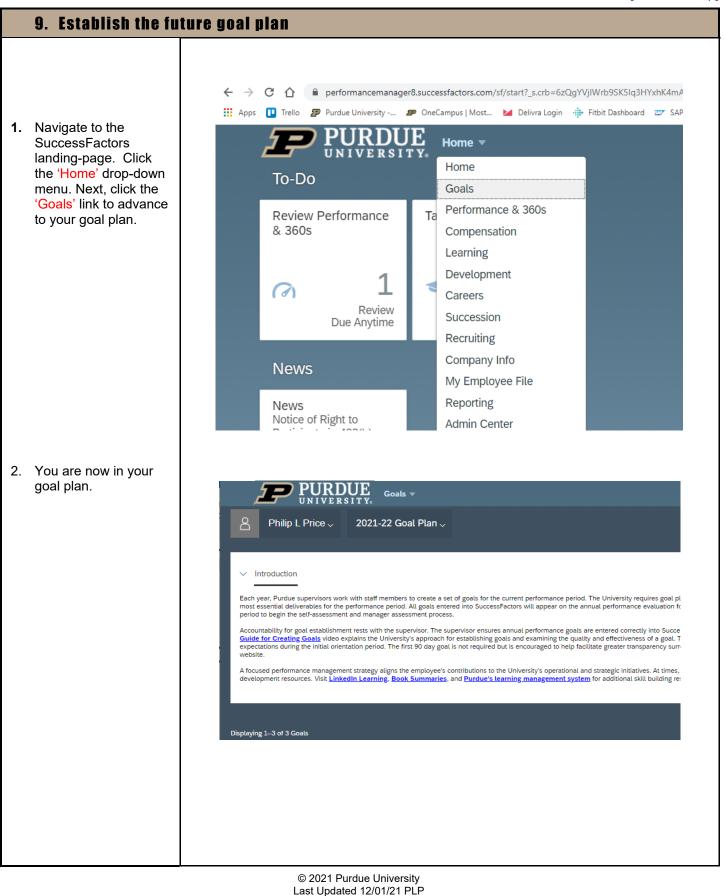
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FURDUE Goals -3. Navigate to the top of Philip L Price \sim 2021-22 Goal Plan \sim Oisplay Options the plan and observe 2020-21 Goal Plan the goal plan date. 2021-22 Goal Plan Click the 'Goal Plan Introduction 2022-23 Goal Plan Drop Down Button', Each year, Purdue supervisors vol performance. Every employee must 2019 Goal Plan the annual performance evaluation must reveauauon nome will be accessible to the supervisor and employee by the last quarter of the performance period. All goals entered into SuccessFactors will appear on the annual performance evaluation must reveauauon nome will be accessible to the supervisor and employee by the last quarter of the performance period. The university requires goal planning as the first step to successful asset the most essential deliverables for the performance period. All goals entered into SuccessFactors will appear on the annual performance evaluation must reveauauon nome will be accessible to the supervisor and employee by the last quarter of the performance period to begin the selfand select the 'Desired Goal Plan'. Accountability for goal establishment rests with the supervisor. The supervisor ensures annual performance goals are entered correctly into SuccessFactors and reviewed regularly by the supervisor and employee throughout the performance period. The <u>Purdue Guide for Creating Goals</u> video explains the University's approach for establishing goals and examining the quality and effectiveness of a goal. The <u>First 9D pays of Employment</u> Goal Outline provides guidance for identifying the new hyberclations during the initial orientation period. The first 9D pays of Employment Goal Outline provides guidance for identifying the new hyberclations during the initial orientation period. The first 9D pays goal is not required but is encouraged to help facilitate greater transparency surrounding goal expectations. Additional goal planning turbrial videos are available on the Human Resources website. The desired goal plan will appear on your A focused performance management strategy aligns the employee's contributions to the University's operational and strategic initiatives. At times, new goals require new skill sets. Visit Purdue's <u>career development website</u> to access staff training and career development resources. Visit <u>Linkedin Learning, Book Summaries</u>, and <u>Purdue's Learning</u> management system for additional skill building resources. screen. E Goals 🔻 ŪN VERSIT Congratulations! You 4. have successfully 8 Philip L Price ~ 2022-23 Goal Plan \sim + Add Goal navigated to your 'Future Goals Plan'. Next, click the 'Add Introduction Goal' button to begin adding goals to the Each year, Purdue supervisors work with staff members to create a set of goals for the current performance period. The University requires g plan. For additional performance. Every employee must have a set of goals that represent the most essential deliverables for the performance period. All goals (instructions on how to add a new goal, reference page 8 of this quick reference guide or watch this short video.



Annual Performance Assessment (employee)

	10. Establish skills	and career development goals
1.	Navigate to the SuccessFactors landing-page. Click the 'Home' drop- down menu. Next, click the 'Development' link and advance to your development plan.	To-Do Review Performance & 360s Reviews Due Anytime To-Do Goals Performance & 360s Development Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Development Courses Due Anytime
2.	You are now in your 'Development Plan'. Before advancing, click the 'Introduction Drop-Down Menu' to access skills and career development resources available to Purdue employees and supervisors.	Pripe Price Undugment Par Image: Distance Image: Distance
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Annual Performance Assessment (employee)

