Quick Reference Guide

Goal Setting and Annual Performance Review for Staff – Last updated 2/21/19

This guide includes the steps to add and maintain goals throughout the performance plan year, in addition, to the steps involved in the annual performance review process.

Hyperlinks:

Intro to Accessing SuccessFactors

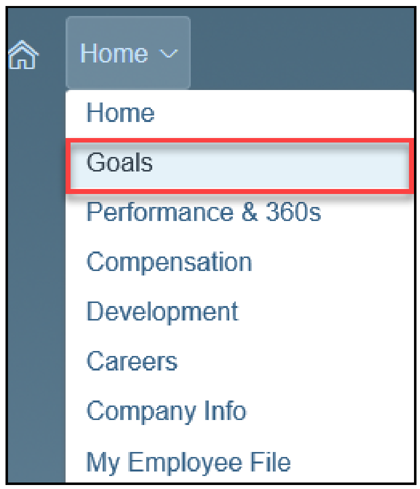
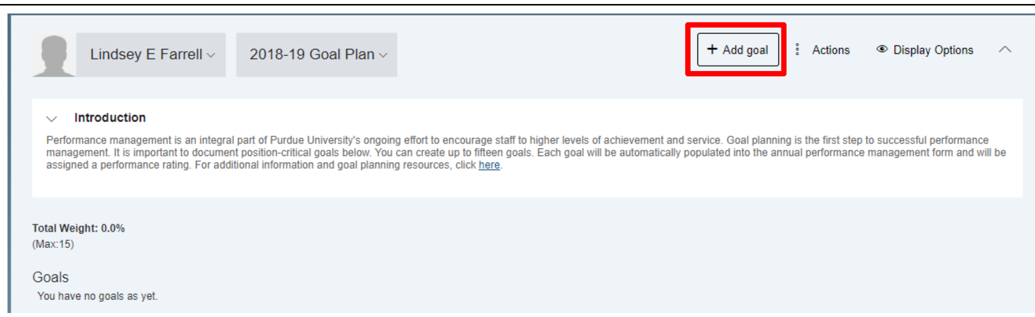
Intro to Goals Management

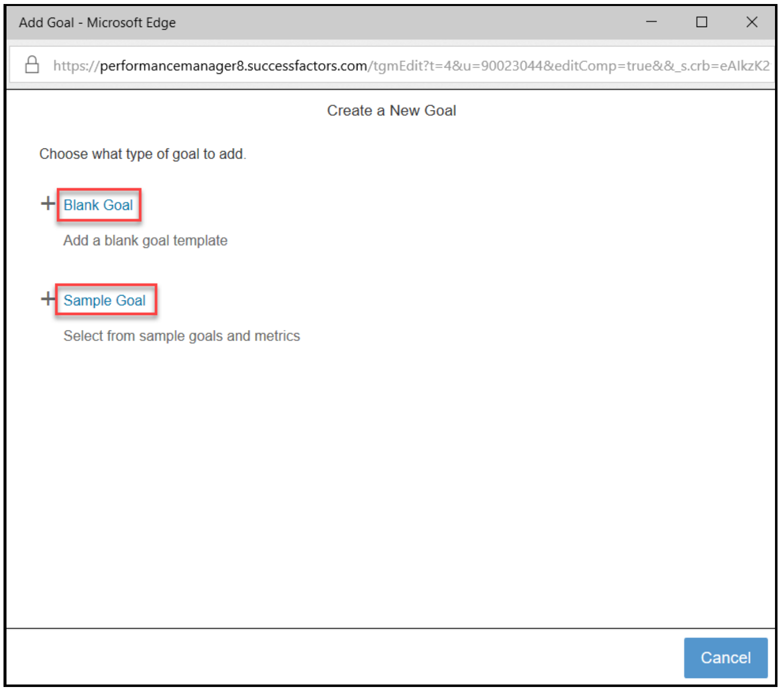
Intro to Self-Assessment for Annual Eval

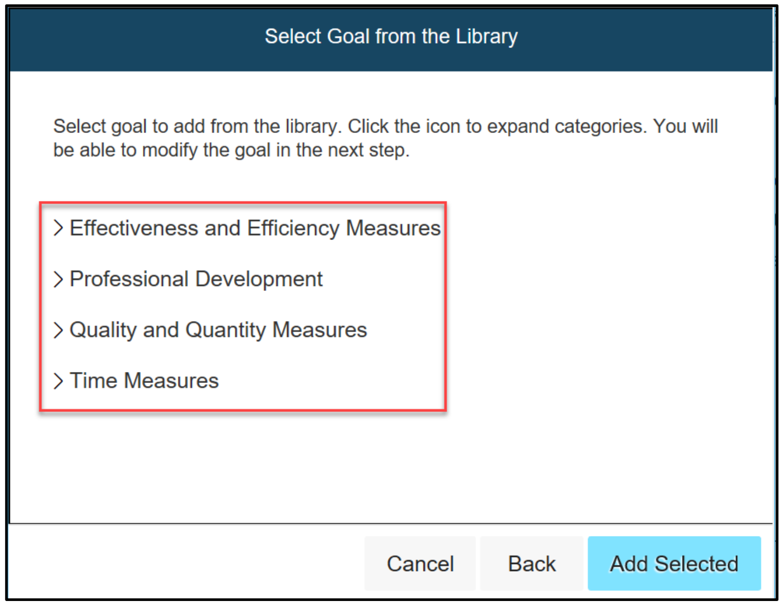
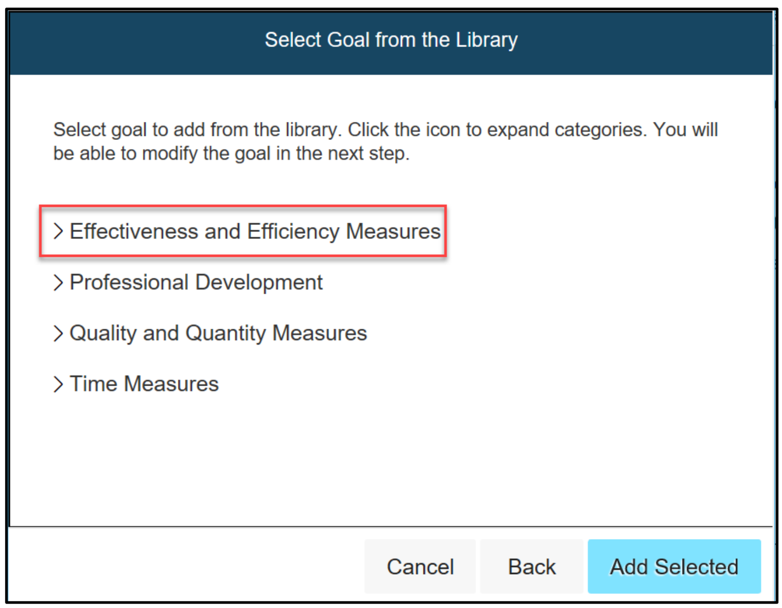
Access SuccessFactors

Visit **OneCampus (**https://one.purdue.edu/) and select **SuccessFactors**. Log in using your Purdue User ID and Boiler Key passphrase.

Add a New Goal

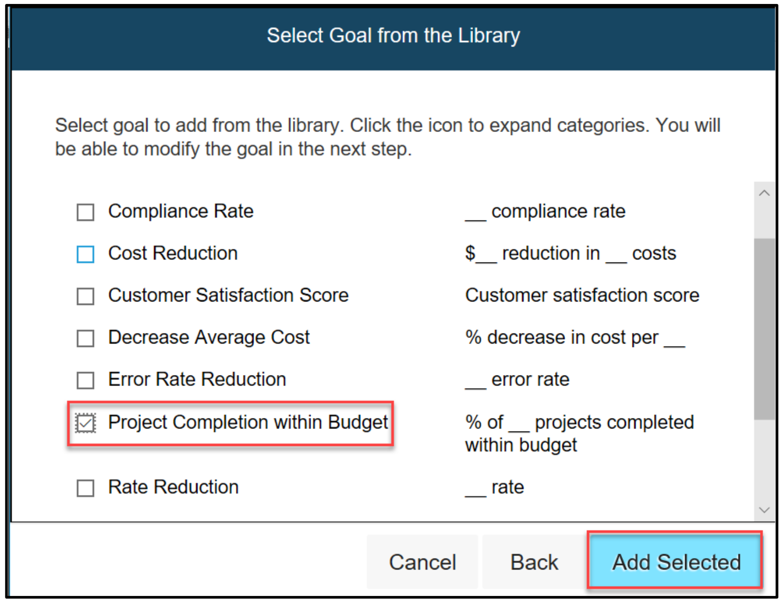
Click on **Home Menu** at top of screen and select **Goals**	
The **Goals** dashboard displays. Click **Add Goal** -> **New Goal**	

There are two options for adding a new goal. Option 1 – Click **Blank Goal.** Option 2 – Click **Sample Goal.** The next two sections cover the steps for each option starting with a **Sample Goal.** This will help provide an understanding of the different components of a goal.	

Add a Sample Goal	
Click the arrow **(>)** to the left of one of the four Purdue overarching metric and measurement categories to view sample goals and metrics.	
Select one or more goals categories. In this example, we've select **Effectiveness and Efficiency Measures.** Click the right facing arrow > to expand the category.	

Select the individual goal of **Project Completion within Budget.**

Click **Add Selected**.



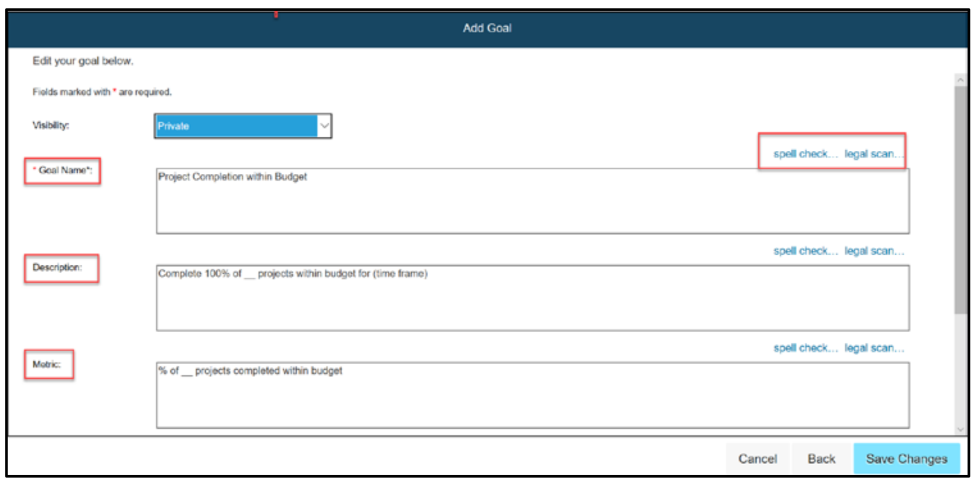
The new goal is auto-populated with the **Goal Name** (required), **Description**, and **Metric.**

Visibility defaults to *Private*. This means that the goal is only visible to the employee, their supervisor, and any supervisors up the line of supervision.

Public goals are visible the employee, their peers, their supervisor, and any other individuals up and down the line of supervision.

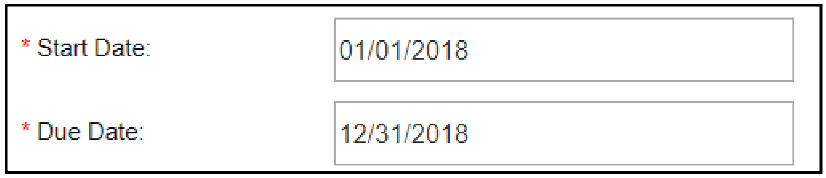
Edit the sample goal defaults to meet your needs and those of your unit.

Spell check and legal scan are available.



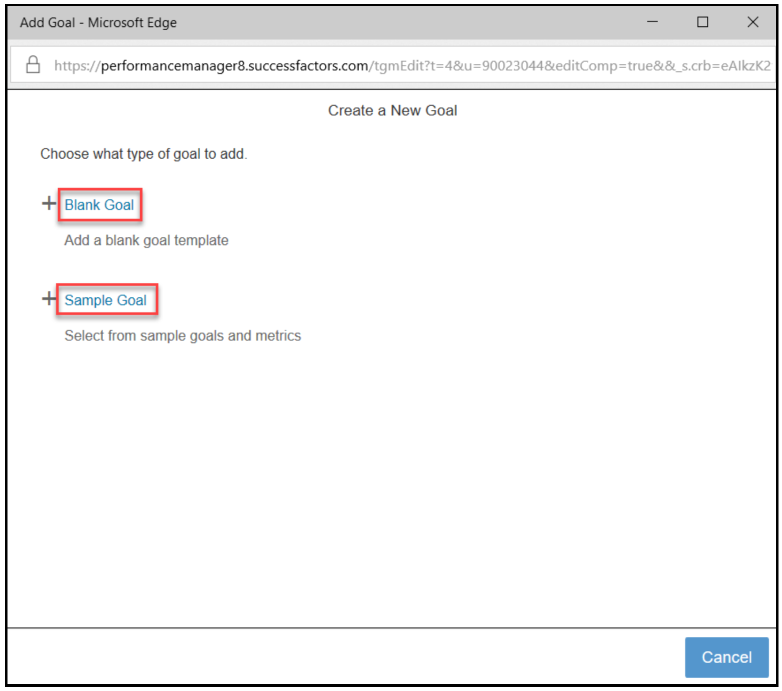
Scroll down to enter the percentage of **Weight** (required) this goal carries toward the total weight of 100% for all goals established for the performance plan year.

(*Note*: Weighting for all goals must equal 100% at the time of the annual performance review.)

Scroll down to enter the **Start Date** (required) and **End Date** (required).	
Continue to scroll down to enter the **% Complete** and **Status**.	
Click **Save Changes**.	

Add a Blank Goal

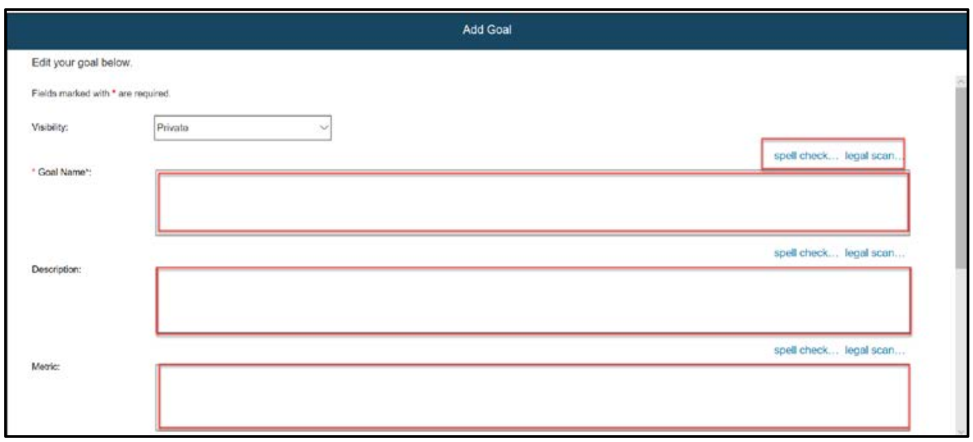
Next, click **Blank Goal.**



The upper portion of the new goal contains the **Goal Name,** a **Description**, and **Metric**; all three of these fields appear blank.

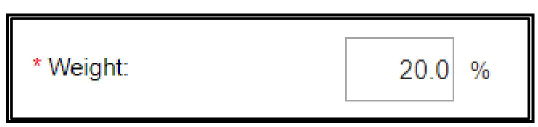
Enter a **Goal Name** (required) and a **Description** and **Metric** (optional).

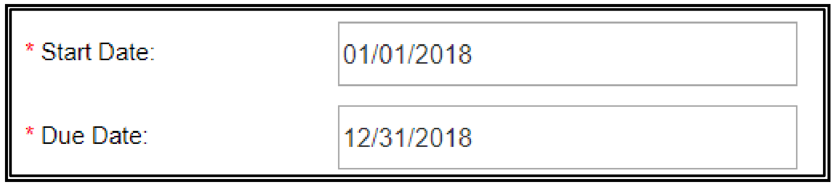
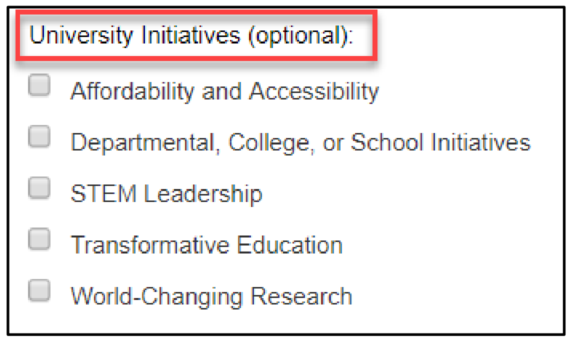
Spell check and **legal scan** are available.

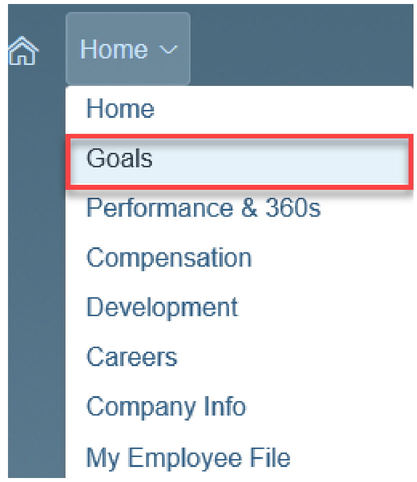
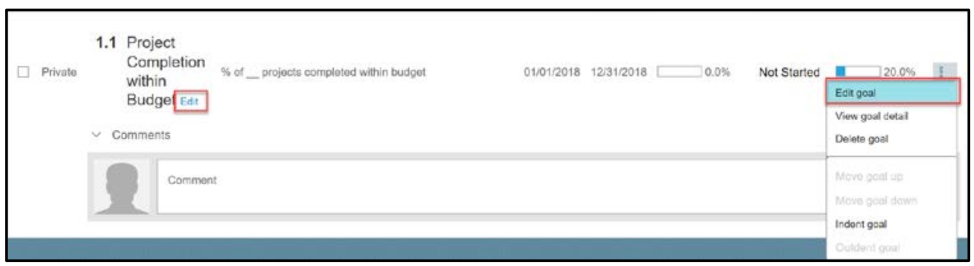
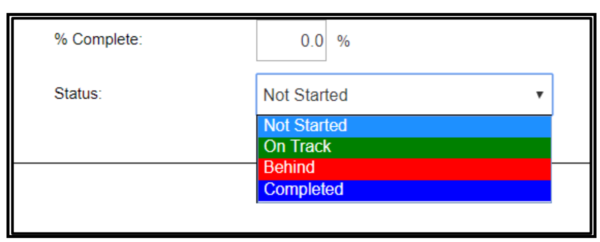


Scroll down to enter the percentage of **Weight** (required) this goal carries toward the total weight of 100% for all goals established for the performance plan year.

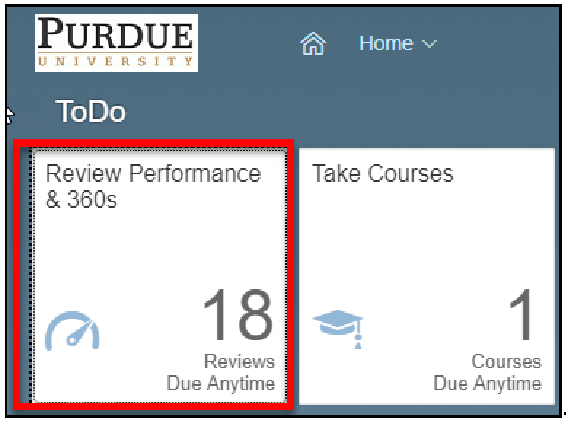
(*Note*: Weighting for all goals must equal 100% at the time of the annual performance review.)



Scroll down to enter the **Start Date** (required) and **End Date** (required).	
Scroll down to enter the **% Complete** and **Status**.	
Lastly, scroll down to select **University Initiatives (optional).** *(Note*: When a goal from the sample library is added, the **University Initiatives** do not display, however, they can be viewed when editing the goal.)	

Edit a Goal	
Click on **Home Menu** at top of screen and select **Goals**	
The **Goals** dashboard displays. To track your progress or to edit a goal there are two options from the Goals dashboard: Option 1 – Click **Edit** next to the name of the desired goal. Option 2 – Click  below **Actions** and select **Edit goal.** (*Note*: Indented (subordinate) goal weights are applied to the total goals weight of 100%.) In this example, click **Edit**.	
Scroll down to enter **% Complete** and/or select a **Status**. (*Note*: Edits to **Goal Name**, **Description**, and **Metric** can also be made throughout the performance plan year.)	
Click **Save Changes**.	

Complete Self-Assessment Annual Evaluation

<table>
<tr>
<td>From the Home page, To Do section, click the Review Performance & 360s tile.</td>
<td>
</td>
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<tr>
<td>Click Employee updates goals and completes self-assessment.</td>
<td>
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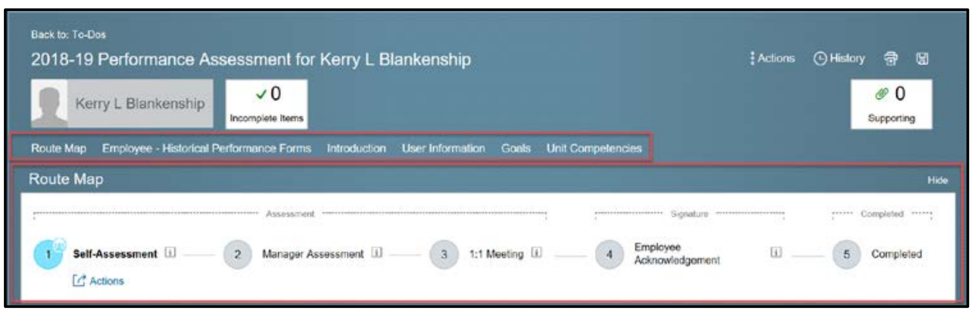
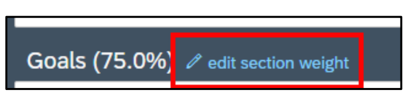
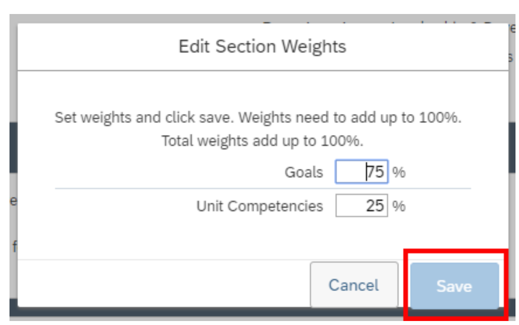
<tr>
<td>The Performance Assessment dashboard provides:

1. Navigational jump links to each section of the form.

2. A process flow Route Map that tracks where you are in the process and the steps completed.</td>
<td>
</td>
</tr>
<tr>
<td>You can also execute Actions including legal scan and spell check, view History including performance and 360 reviews, attach Supporting documents, print, save as a PDF, or save changes to the assessment.</td>
<td>
</td>
</tr>
<tr>
<td>Scroll down to the section titled Goals. This is the first section in the form.

Note: If your unit is utilizing weighting other than the 75% goals/25% competencies weighting, click Edit Section Weight and enter the appropriate weights (as defined by your unit)</td>
<td>


</td>
</tr>
</table>

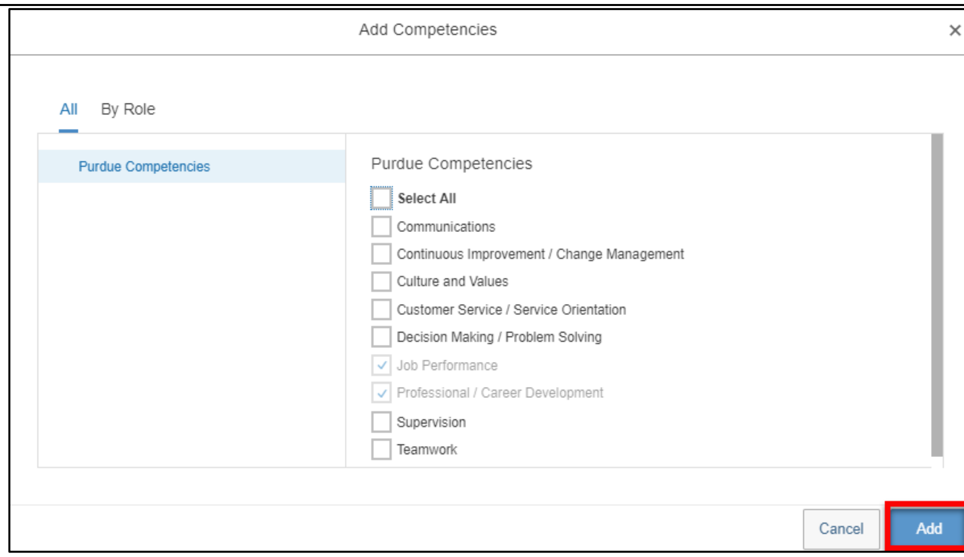
All the goals maintained throughout the performance plan year are automatically loaded into the self-assessment form during the Performance Review period.

From here you can add a **Rating** and **Employee Comments** for your manager's review for each goal.

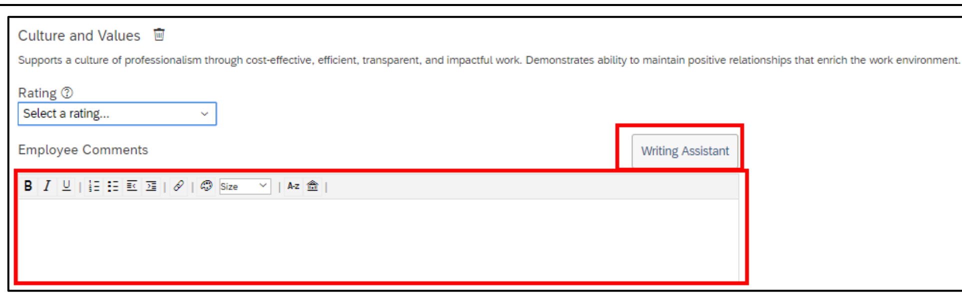
You can also enter **Overall Comments on Goal Achievement**. (optional)

Next, scroll down to complete the **Unit Competencies** section add click **Add Competency**

Ensure a checkmark is placed beside the competencies utilized by your unit. Add checkmarks, as appropriate, and click **Add** to save the unit competencies in the form. Remove competencies by selecting the adjacent trash icon next to the competency name.



You are encouraged to document your accomplishments for each competency in the space provided. Click **Writing Assistant** for sample wording.



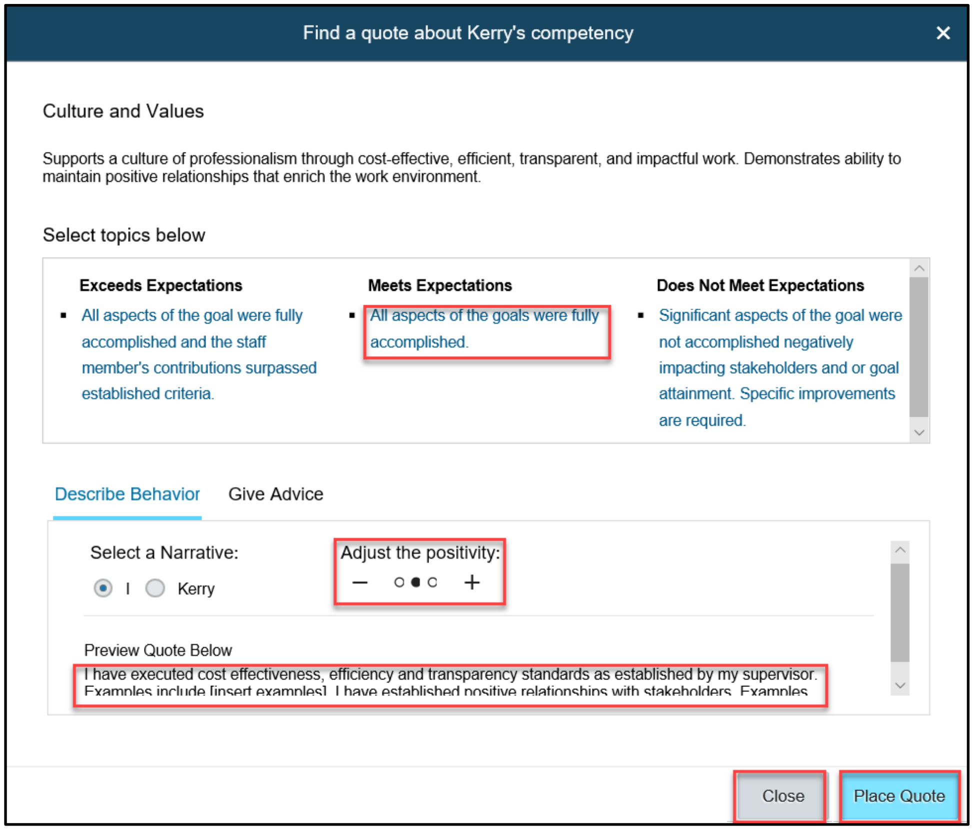
For each unit competency sample language is provided that aligns to three performance levels.

Click the performance level; sample language appears in the **Preview Quote Below** section.

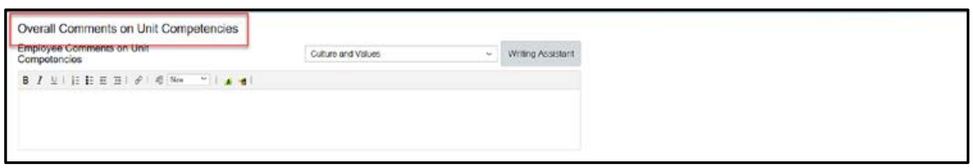
From here you can **Adjust the positivity (- / +)**.

Once you are satisfied with the wording, click **Paste Quote** and **Close.**

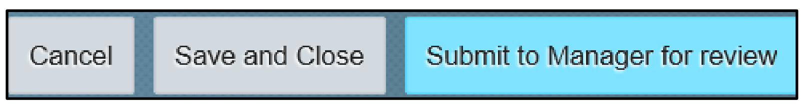
Edit sample language as appropriate



You can also enter **Overall Comments on Unit Competencies.** (optional)

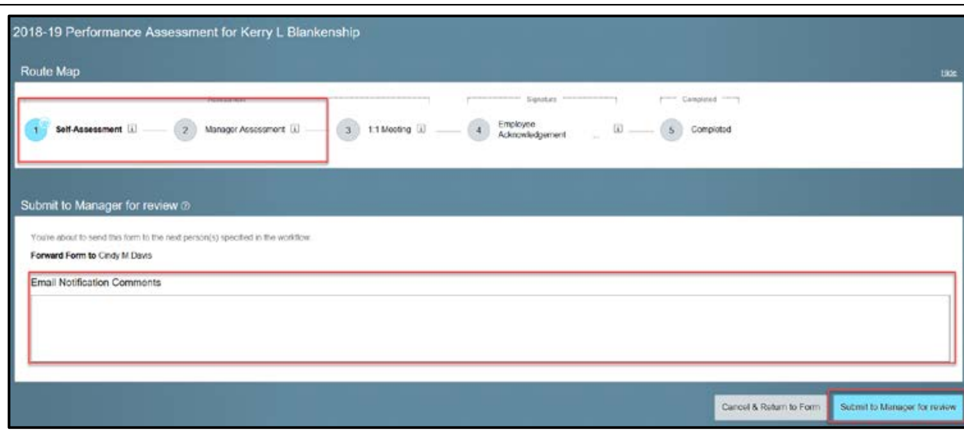


If the self-assessment form is complete, click **Submit to Manager for review**.

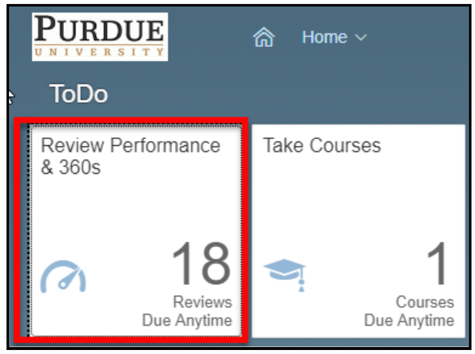
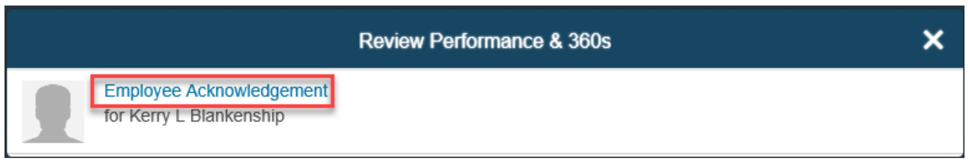
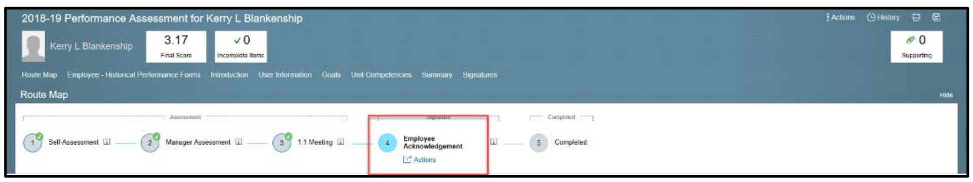
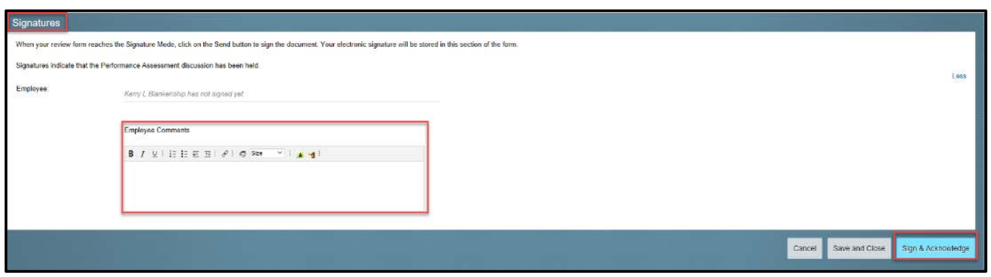


Enter additional comments (optional). If comments are entered, they will appear in email notification to manager.

Click **Submit to Manager for review** and your manager will receive an email notification.



Enter Electronic Signature

After your manager has completed your performance evaluation, the completed performance assessment is routed back to you for an electronic signature of acknowledgment. From the **Home** page, **To Do** section, click the **Review Performance & 360s** tile.	
Click **Employee Acknowledgement**.	
Your **Performance Assessment** form indicates the process is at Step 4: **Employee Acknowledgement.**	
Scroll down to review the assessment including comments and ratings from your manager. Scroll to the bottom to the **Signatures** section. Add **Employee Comments** regarding the final assessment (optional) before submitting your electronic signature. Click **Sign and Acknowledge.**	
Confirm by clicking **Sign and Acknowledge** again. The annual performance assessment is complete.	
The completed assessment is stored in the **Completed** folder on the **Performance** dashboard.