

Cheat Sheet: Annual Evaluation, Goals, and Development Plan for Supervisors – Last updated 10/18/19

### Accessing SuccessFactors and Basic Navigation

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

From the home page, click the **Home** menu drop down and access one of the following **Performance Management** modules:

- **Performance and 360s:** *Performance* - Rate individual performance and document annual performance feedback comments. *360s* - Collect performance feedback from peers and key stakeholders.
- **Goals:** Document and track strategic and operational performance goals for the performance period.
- **Development:** Document and monitor career and development goals throughout the performance period.

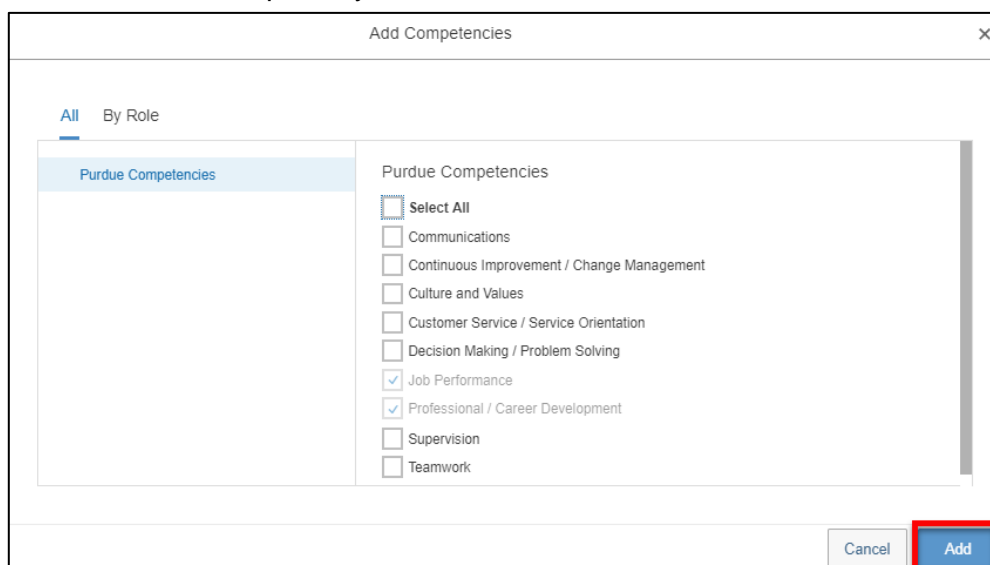
To access comprehensive videos explaining the above modules, visit the [Leadership and Organizational Development website](#).

### Performance (Annual Performance Assessment)

Two-Minute Video: [Intro to Annual Evaluation](#)

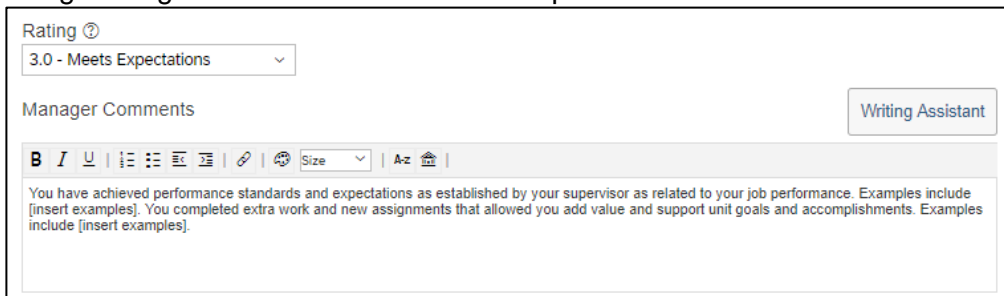
Detailed Quick Reference Guide: [Goals and Performance Review for Supervisors](#)

1. Click link '**2018-19 Performance Assessment for <EmployeeName>**' to access annual evaluation form.
2. Scroll down to the Unit Competencies section of the form and click the **Add Competency** button. 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.



The screenshot shows a window titled "Add Competencies" with a close button (X) in the top right. Inside, there are tabs for "All" (selected) and "By Role". Below the tabs is a section titled "Purdue Competencies" containing a list of competencies with checkboxes: "Select All", "Communications", "Continuous Improvement / Change Management", "Culture and Values", "Customer Service / Service Orientation", "Decision Making / Problem Solving", "Job Performance" (checked), "Professional / Career Development" (checked), "Supervision", and "Teamwork". At the bottom right of the window are "Cancel" and "Add" buttons, with the "Add" button highlighted by a red rectangle.

3. Assign ratings and enter comments for all performance criteria.



The screenshot shows a form section for a performance evaluation. At the top, there is a "Rating" dropdown menu with a help icon, currently set to "3.0 - Meets Expectations". Below this is a "Manager Comments" text area with a "Writing Assistant" button to its right. The text area contains a rich text editor toolbar with options like Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Size, and Font Color. Below the toolbar, there is a text box with placeholder text: "You have achieved performance standards and expectations as established by your supervisor as related to your job performance. Examples include [insert examples]. You completed extra work and new assignments that allowed you add value and support unit goals and accomplishments. Examples include [insert examples]."

4. Meet with employee and finalize annual evaluation.

## Development (Individual Professional Development Plan)

One-Minute Video: [Intro to Creating a Development Plan](#)  
Detailed Quick Reference Guide: [Individual Development Plan](#)

1. Click **<YourName>** and select team member to access the individual's development plan.

The screenshot shows a user interface for a development plan. At the top, there is a dropdown menu for 'Adedayo O Adeniyi' and a '2018-19 Development Plan' dropdown. Below these, there is a search bar and a list of team members. The 'Reports' section is expanded, showing 'Amy M Deitrich' and 'Hugh A Gardner'. 'Amy M Deitrich' is highlighted with a red box.

2. Click the **Edit** button to view and update development goals.

Development Goals		Description		Start Date	End Date	Status	Competencies	Action
Visibility	#	Goal Name						
Private	1.1	Obtain certification	<b>Edit</b>	description	01/01/2018	12/31/2018	On Track	Communications, Professional / Career Development

## Goals

Two-Minute Video: [Intro to Goals Management](#)  
Detailed Quick Reference Guide: [Goals and Performance Review for Supervisors](#)

1. Click **<YourName>** and select team member to access the individual's goal plan (see Step 1 above).
2. Click the **Edit** button to view and update goals.

The screenshot shows a goal management interface. A goal titled '1.2 Continuous Improvement of Procedures' is displayed. It includes a progress bar showing 40.0% completion, a status of 'On Track', and a description 'Recommend process improvements to \_\_\_ procedures by (date)'. The 'Edit' button is highlighted with a red box. Below the goal, there is a 'Comments' section with a text input field and 'Cancel' and 'Post' buttons.

3. Looking to save time? Watch a two-minute video to learn how assign an existing goal to one or more employees. View video: <https://www.purdue.edu/hr/lod/media/videos/gmpm/4/story.html>

## 360s (360 Feedback Survey)

Three-Minute Video: [Intro to Initiating 360 Feedback](#)  
Detailed Quick Reference Guide: [360 Feedback for Supervisors](#)

1. Create 360 feedback survey
2. Identify respondents
3. Select competencies
4. Distribute document to raters
5. Interpreting 360 results – View one-minute video: <https://www.purdue.edu/hr/lod/media/videos/gmpm/7/story.html>