



## FY 2017 Employee Performance Review Instructions

Once you have logged in to SuccessFactors, you will notice that you have an inbox, "To Dos" where forms and other messages may appear.

Click on the "Employee Self Review" hyperlink to begin the process.

The performance review form has 2 sections that you need to complete:

Section 1 - Competencies

Section 2 - Goals/Accomplishments

### For Section 1, "Competencies", add Rating & Comments

#### Add a rating

Select the rating from the menu that best represents your proficiency.

Rating	Description
1 Needs Improvement/Development	Further development and improvement is recognized. An opportunity area for an Individual Action Plan.
2 Meets Expectations	This is a good rating! Performance is solid with minor deviations.
3 Exceeds Expectations	Accomplishments are regularly above expected levels.
4 Substantially Exceeds Expectations	Consistently demonstrating exceptional accomplishments, far exceeding normal expectations.

#### Add comments

Here's where you enter your evaluation feedback. Consider your overall, year - long performance in this area, and provide clear and specific examples if applicable. **If you give yourself a "4" in any section, you are required to provide comments and specific examples of your performance that substantially exceeded expectations.**

### For Section 2, "Goals/Accomplishments"

Please look backwards to rate your goals/accomplishments for the past Fiscal Year (FY2017).

If you did not enter goals in the system last year, click on the "Create a new Goal" to add in goals that were previously discussed during the past fiscal year. For each goal you enter, you will be required to select a "Goal Category". If a goal does not clearly align under one of objectives, you can select 'Other - Role Specific Goals'.

#### Completing the Review

When you're ready, route the form to your manager by selecting the "Send to Manager" button, located at the lower middle or top portion of your screen.

Your manager will now complete your assessment.

During the first half of June, your manager will schedule time for both of you to review the evaluation. You will have an opportunity to read and make comments prior to providing your electronic signature.

### **FY18 Goals/Workplan & Individual Development Plan**

As part of your self-review, identify your top 3 priorities for FY18 and create action plans for targeted improvement areas. You will finalize these together with your manager.

You may provide updates on the FY18 Goals/Workplan and Individual Development Plan throughout the 2018 Fiscal year even after the FY17 performance review form is completed.

From the home screen, the "Home" tab on the upper left hand side is a drop-down menu containing "Goals." You may toggle between the FY18 Workplan and Individual Development Plan by using the "Switch Plan" drop-down menu in the upper right hand side.