



## FY17 Manager Performance Review Instructions

Once you have logged on, you will notice that you have an inbox, "To Dos" where forms and other messages may appear. Click on the "Manager 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 employee's 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

Enter your feedback. Comments are **mandatory** for a 1 or 4 rating. Consider the employee's overall, yearlong performance in this area, and **provide clear and specific examples**. The "writing assistant" tool is also available for your use.

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

Please rate the employee's goals/accomplishments for this past Fiscal Year, FY2017.

#### Completing the Review

When you're ready, route the form to the next step in the process by selecting the "Send to Manager" button, located at the lower middle or top portion of your screen. (Note: some Managers will not have a "Send to Manager" button. They will need to route it through the next step in the process.

Once all managers have approved and reviewed, the review gets routed to HR for review.

### Face to face meeting

After HR has approved the review, you will receive an email notification (along with the employee's review in your SuccessFactors inbox) to schedule a face to face conversation with your employee(s). Together, you will complete the FY18 Workplan and Individual Development Plan.

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

Finalize these together during the face-to-face meeting.

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 containing "Goals." You can toggle between the FY18 Workplan and Individual Development Plan by using the "Switch Plan" drop down in the upper right hand side.

After the face-to-face meeting with your employee(s), the final approved and communicated review will be sent to the employee(s) for their electronic signature. Then, it will be routed back to you where you will also provide your electronic signature.