

# Performance Evaluation Form for Managers



After the employee completes the self review, the form is routed to the manager for review. The manager provides an assessment of performance against agreed goals and competencies listed on the form during the Manager Review. In this guide learn the basic features of the form and process as well as the steps to complete the Manager Review.

## 1 Getting Started

To get started, select the Manager Review link on the To-Dos list. Forms requiring actions or input are available in the Inbox on the Performance tab which organizes all current and completed forms in a series of folders.

## 2 Form Sections (see Form Sections)

Form Sections display the information required to complete the form. Sections are added as the form moves through the review process. Instructions are provided for each section.

## 3 Ratings

Use the rating drop down to select a rating that represents the employee's performance on the item listed. Click on the Rating link to view an expanded definition of each rating listed on the drop-down menu.

## 4 Comments

Use the comments field listed for each item on the form to provide comments evaluating progress, demonstration of performance, and/or examples to support the ratings provided.

## 5 Comment Tools

Comments support rich text formats including colors, bold, and bullets. Click in a comments text box and the toolbar appears. Tools include: **Spell Check** | **Legal Scan** | **Writing Assistant**

## 6 Form Status/Route Map

The current performance stage is highlighted in bright green on the form with required routing actions listed below the progress bar. Routing options are listed below the current stage and vary by participant and differ during the performance process.

**Send** - Sends the form to the next step.

**Route** - Routes the form between manager and employee for iterative steps without advancing to the next process stage.

**NOTE:** After selecting the review option, the form automatically starts the Spell Check and Legal Scan of comments. Complete the scans before sending the form to the next step.

## 7 Form Toolbar

**View Form** - Changes display to full form.

**View By Section** - Changes display to section by section.

**View By Item** - Changes display to item by item on an individual section.

**Spell Check** - Spell checks all comments on the form.

**Legal Scan** - Searches all comments and flags potentially inappropriate words.

**Print** - Prints the form.

**Save** - Saves changes and updates to the entire form.

**Form History** - Review the history of the form through the process.

**Notes** - Review notes and reminders written about the employee.

**Audit Trail** - Displays audit trail information related to the process.

**Add to Calendar** - Creates a calendar entry for the next form step due date.

## Performance Management Quick Reference Guide

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