

# Performance Evaluation Form for Employees



The Performance process starts with the employee providing a self assessment of performance against agreed goals and competencies listed on the form during the Employee Self Review. In this guide learn the basic features of the form and process as well as the steps to complete the Self Review.

## 1 Getting Started

To get started, select the Employee Self 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 your 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 you.

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

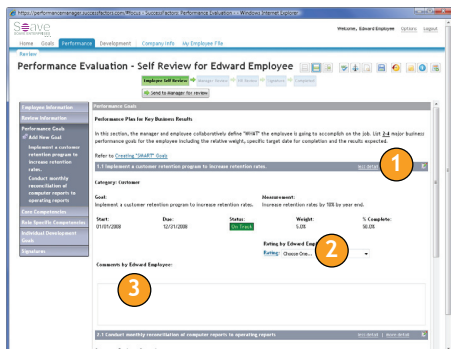
**Add to Calendar** - Creates a calendar entry for the next form step due date.

## Performance Management Quick Reference Guide

SuccessFactors Confidential. For internal use by licensed SuccessFactors customers only.

© 2006 SuccessFactors Incorporated. All rights reserved. SuccessFactors, and the SuccessFactors logo are registered trademarks of SuccessFactors Incorporated in the United States.

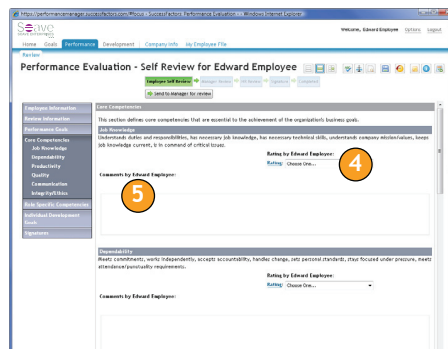
# Form Sections



## Performance Goals

In this section, the manager and employee collaboratively define “WHAT” the employee is going to accomplish on the job. Goals are automatically transferred from the goal plan to the form.

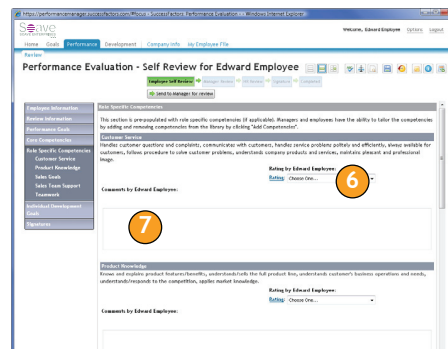
- 1 Use edit icon to update the details of the goal.
- 2 Rate your level of performance on the goal.
- 3 Provide comments evaluating progress, demonstration of performance, and/or examples to support the rating.



## Core Competencies

Core competencies are essential to the achievement of the organization’s business goals. All employees are evaluated on these competencies important to Soave.

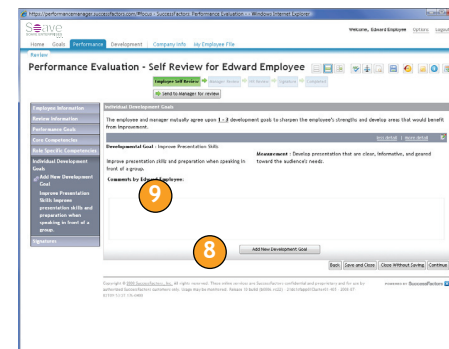
- 4 Rate your level of performance on the each of the competencies listed on the form.
- 5 Provide comments evaluating progress, demonstration of performance, and/or examples to support the rating.
- 6 Rate your level of performance on the each of the competencies listed on the form.



## Core Values

This section is pre-populated with role specific competencies. These competencies are specific to your role in the organization.

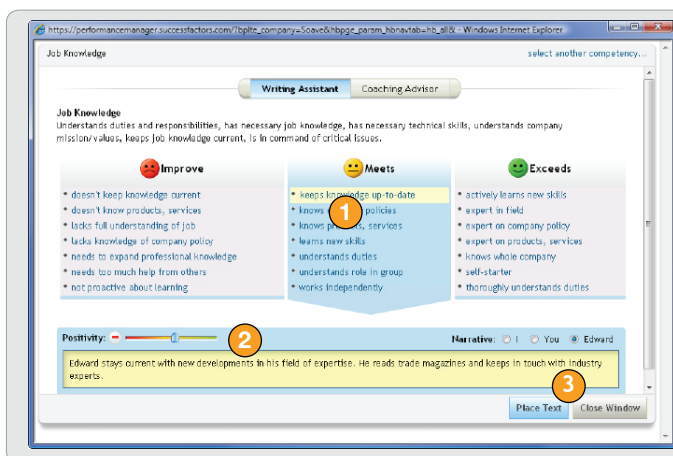
- 7 Provide comments evaluating progress, demonstration of performance, and/or examples to support the rating.
- 8 Rate your level of performance on the each of the competencies listed on the form.



## Development Goal

You and your manager mutually agree upon 1 – 3 development goals to sharpen your strengths and develop areas that would benefit from improvement.

- 8 Click the **Add New Development Goal** button to add development goals directly to the form.
- 9 Provide comments evaluating progress, demonstration of performance, and/or examples to support the rating.



## Spotlight: Writing Assistant

The Writing Assistant provides suggested text to quickly build review comments for competencies and values. Use the **Writing Assistant** to review sample descriptions of behaviors and performance levels. To add comments to the review, click the **Writing Assistant** link in the **Comments** toolbar. A new window will appear.

- 1 Select attributes and display suggested text.
- 2 Change the positivity and the narrative of the text.
- 3 Click the **Place Text** button to insert the text in the comments field. Multiple text can be added to each comment field. This is only a guide. You should edit the text to tailor it to your specific review feedback.