Einstein Performance Feedback Program

User Guide: SuccessFactors Performance Management System

Human Resources Department

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Einstein Performance Feedback Program

The **Einstein Performance Feedback Program** is an ongoing process throughout the year, starting with employees setting clear goals to define what they need and want to achieve, providing feedback throughout the year, conducting check in conversations, and completing a year end assessment.

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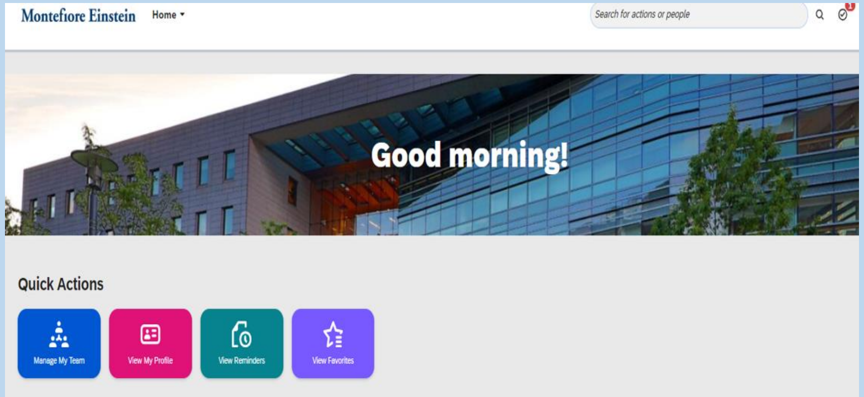
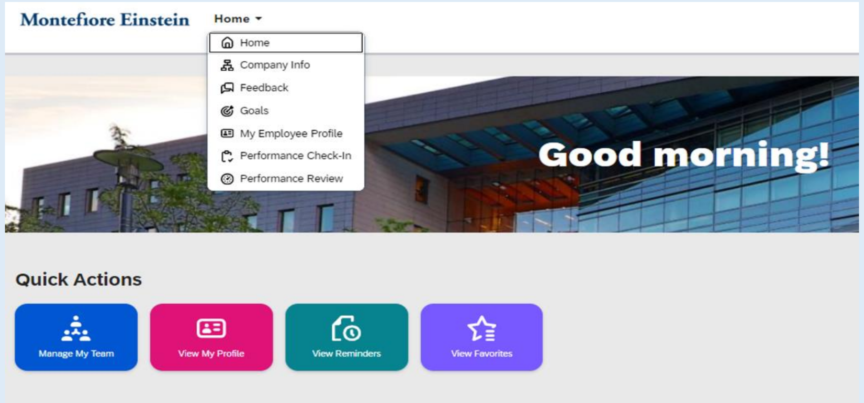
Agenda

1. Accessing and Navigating the SuccessFactors System
2. Managing Goals
3. Performance Check Ins and Feedback
4. Performance Reviews

Accessing and Navigating the SuccessFactors System

Single Sign On **Login** for SuccessFactors	Use this Link
SuccessFactors **Home Page** When you log in to SAP SuccessFactors, the **Home Page** is displayed.	
The Navigation Menu **(Home)** is available as a drop-down menu in the upper-left corner and displays the modules to which you have access. Depending on a user's role within the organization, they may see different options in the menu.	

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Managing Goals

Goals refers to Performance Goals and Development Goals. The SuccessFactors system facilitates and automates the process of creating, cascading, publishing goals and monitoring performance against goals in one central location.

Goals should be SMART:

- Specific
- Measurable
- Achievable
- Relevant
- Timebound

For more information on SMART Goals and Goal Setting click here.

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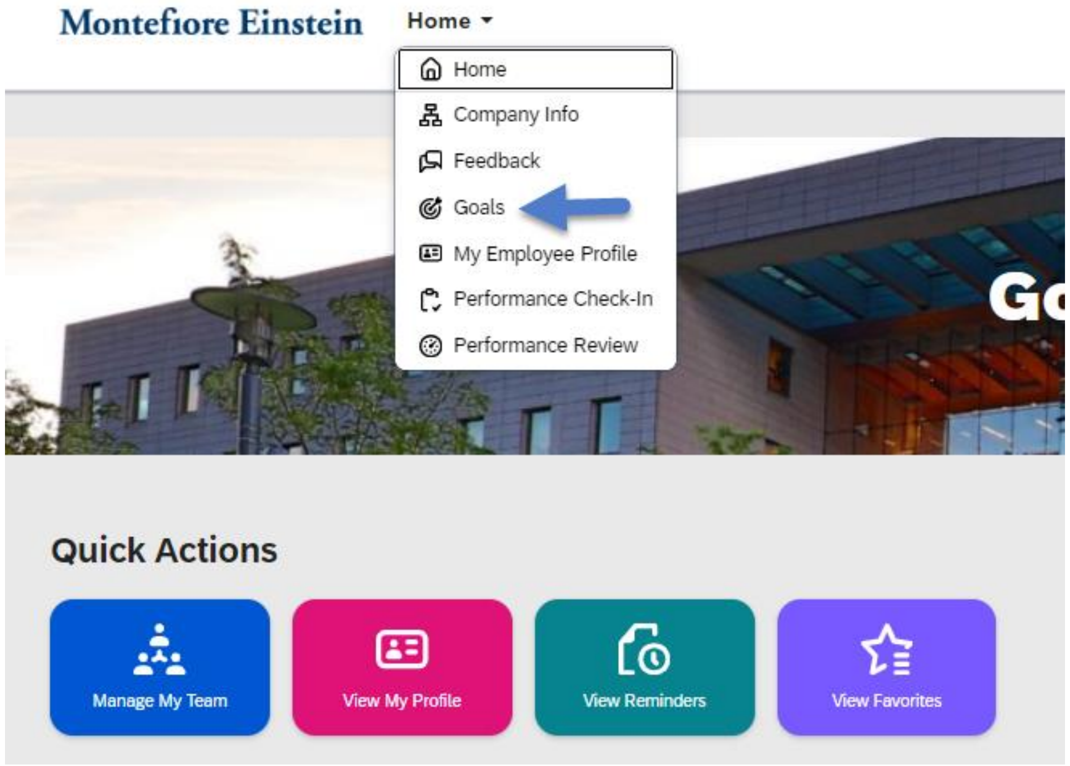
Navigating to Goals

To navigate to Performance Goals and Development Goals:

1. Upon logging in to SuccessFactors, you will see the Home page. Click the **Home** dropdown menu from the upper-left part of the page.
2. Click the **Goals** tab to access your personal Goal Plan.



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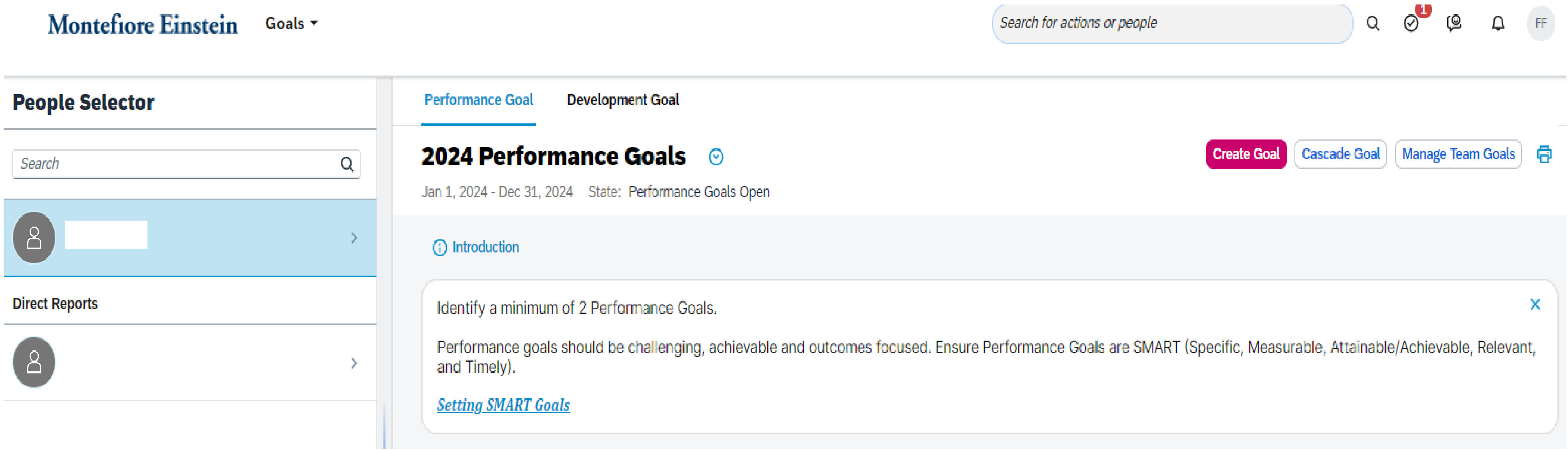
Goal Plan

Goal Plans are online worksheets used by the employee and manager to create performance goals in one central place and track progress on them throughout the year.



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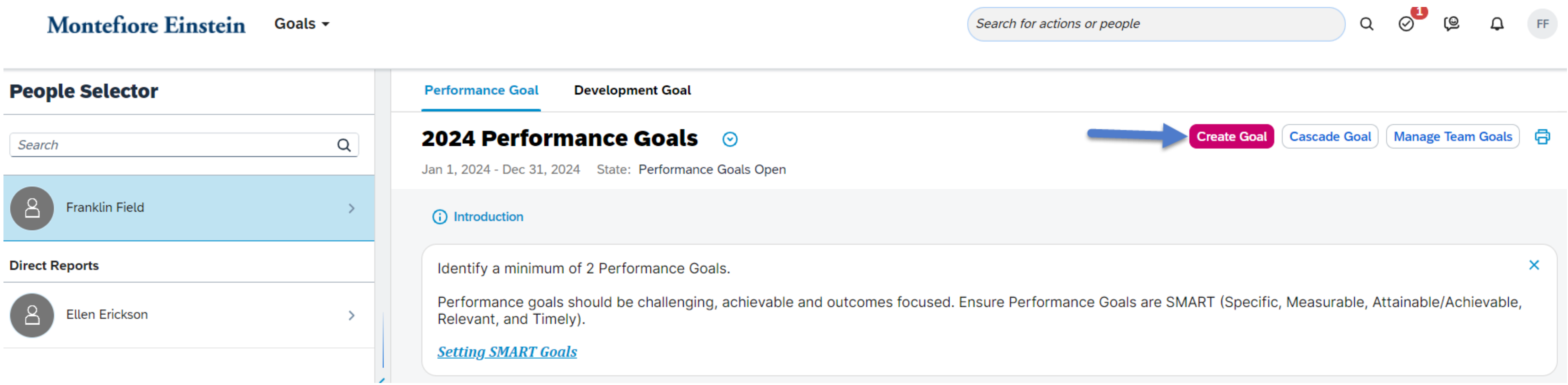
Creating Performance Goals

1. Click the **Home** menu dropdown and navigate to **Goals**
2. Click Create Goal



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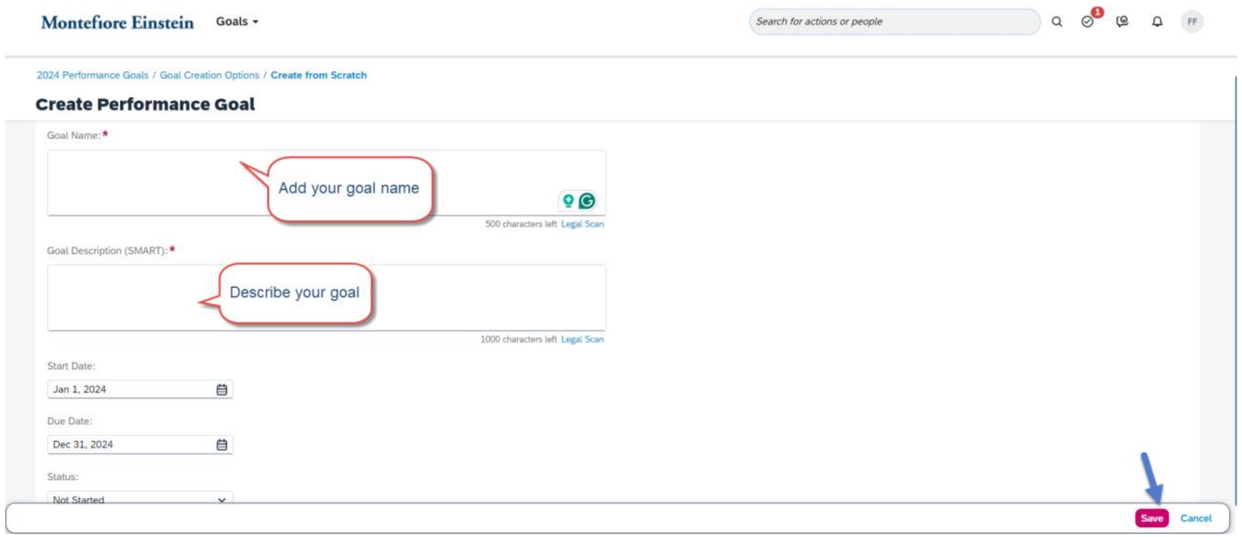
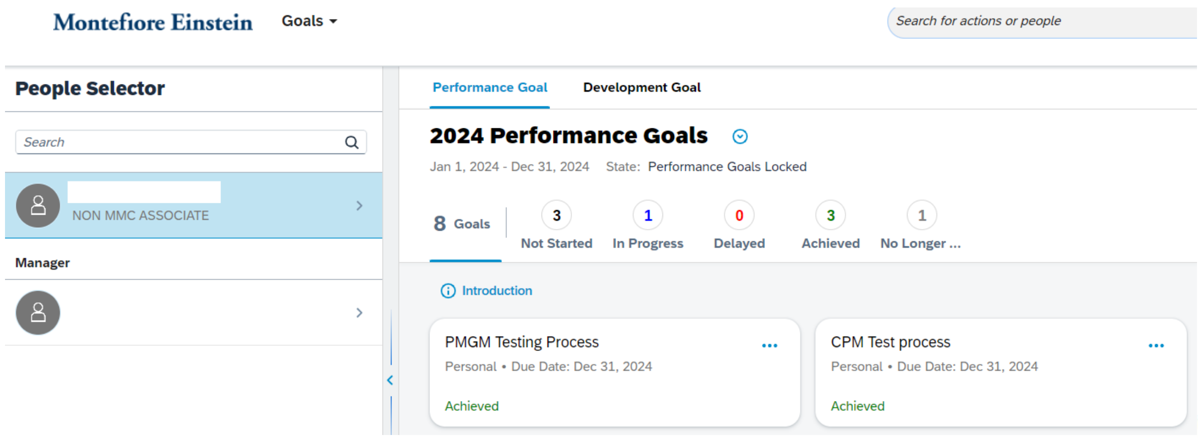
Creating Performance Goals (Continued)

Enter the goal name, description, and additional details and then click Save



Once goals are saved you can see your goal plan



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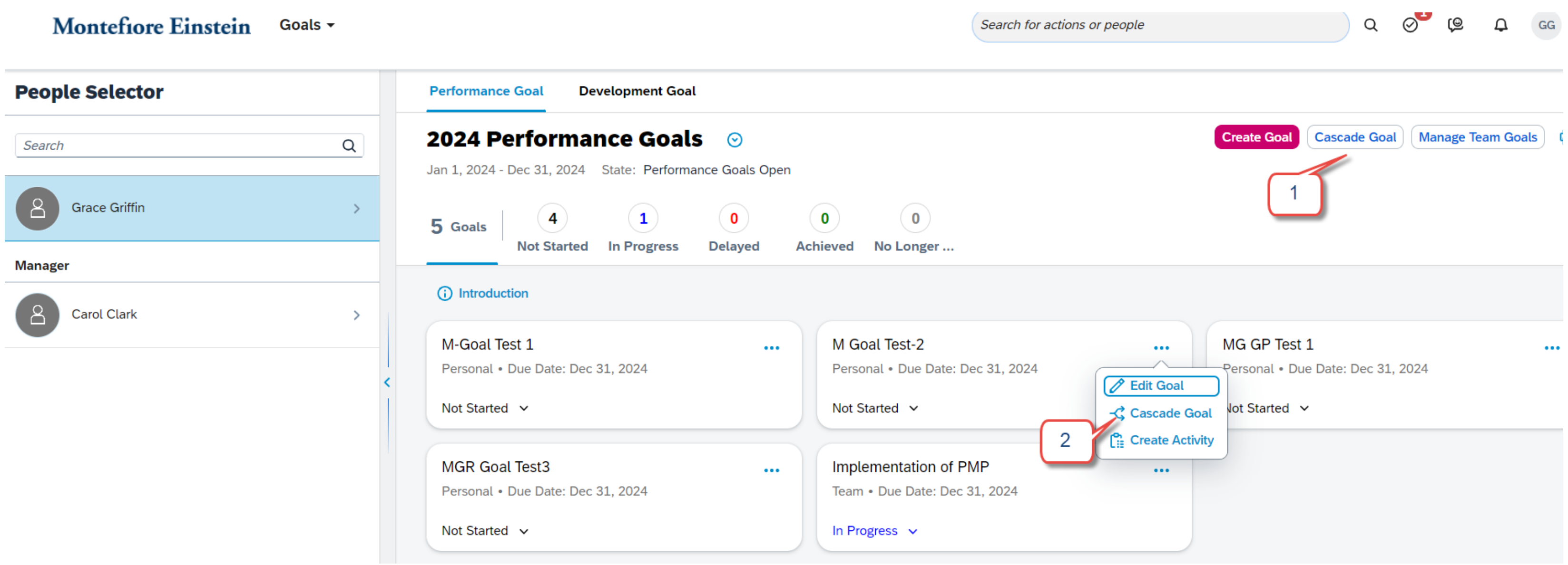
Cascade Goals

As a manger, you can cascade a performance goal to team members by:

1. Clicking on the goal
2. Click Cascade Goal



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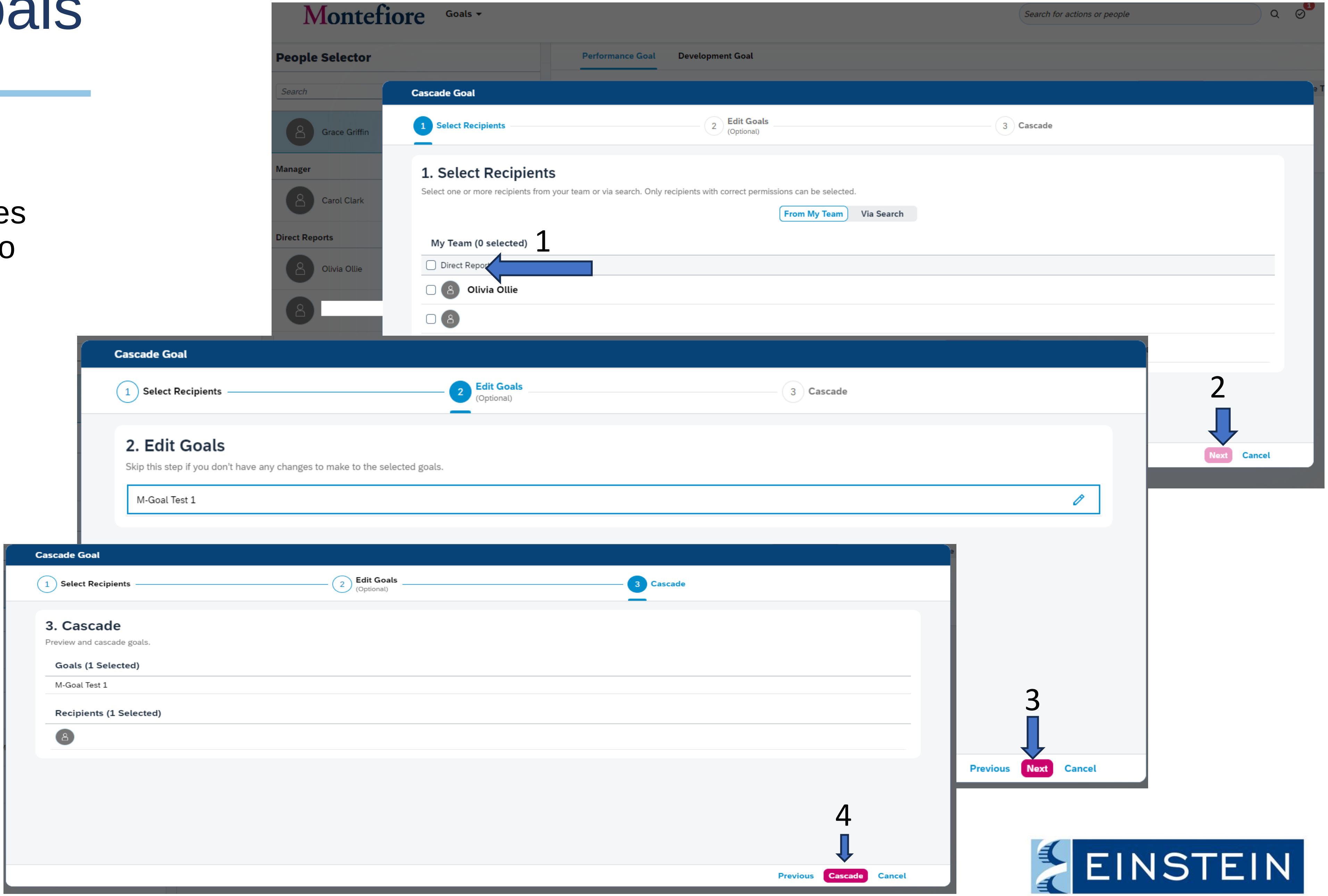
Cascade Goals
(Continued)

1. Select the employees to whom you want to cascade the goal
2. Click Next
3. Enter goal details and click Next
4. Click Cascade



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Manage Team Goals

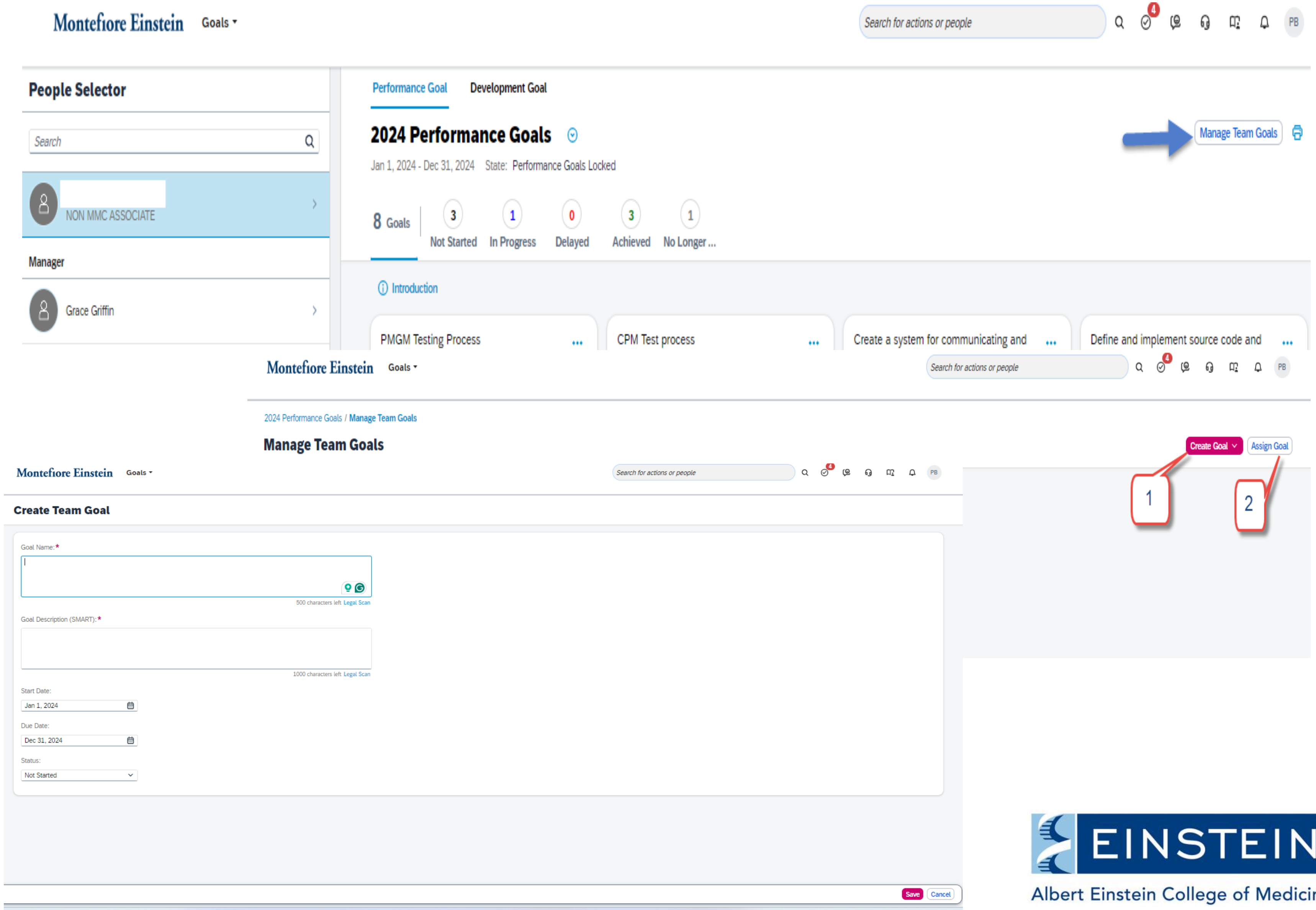
As a manager, you can set up team goals.

At the top right of the Goal Plan, click Manage Team Goals

You will see two options:

1. Create Goal
2. Assign Goal

Select create goal, enter goal details, and then save



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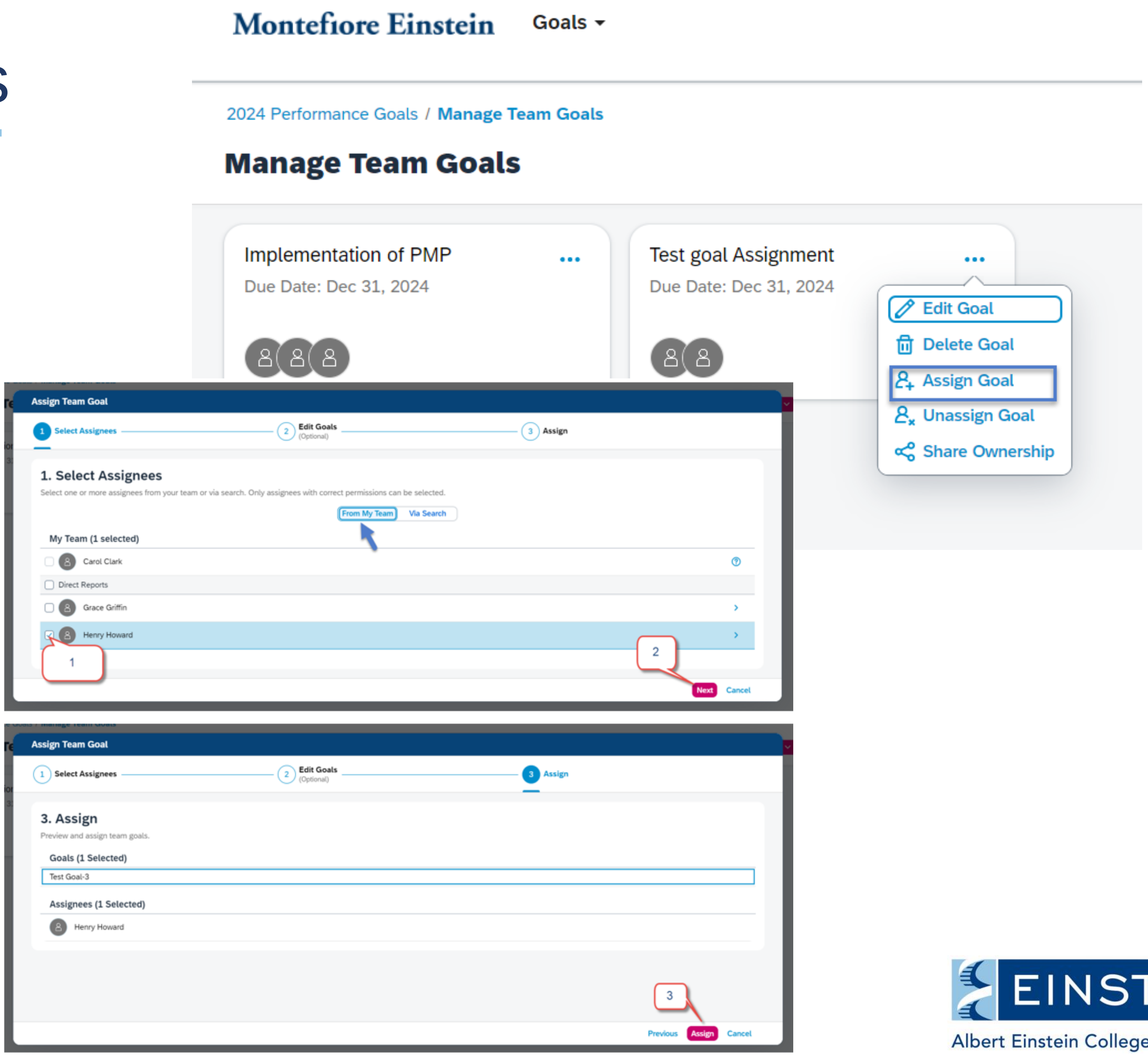
Assign Team Goals

To assign a Team Goal, select **Assign**

1. Select a Direct Report in from **My Team** by clicking the check box next to their name
2. Select next
3. Select Assign



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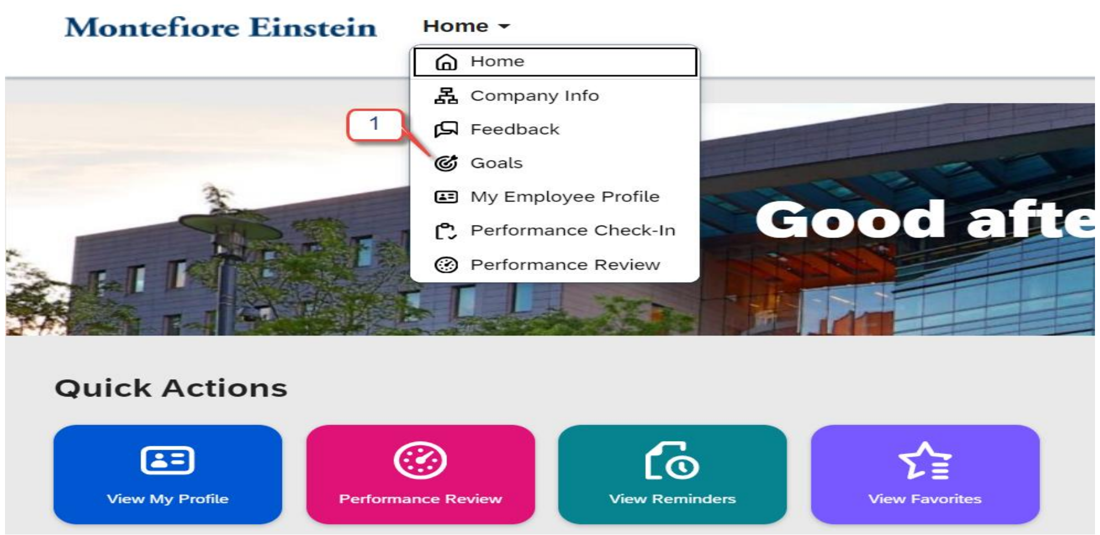
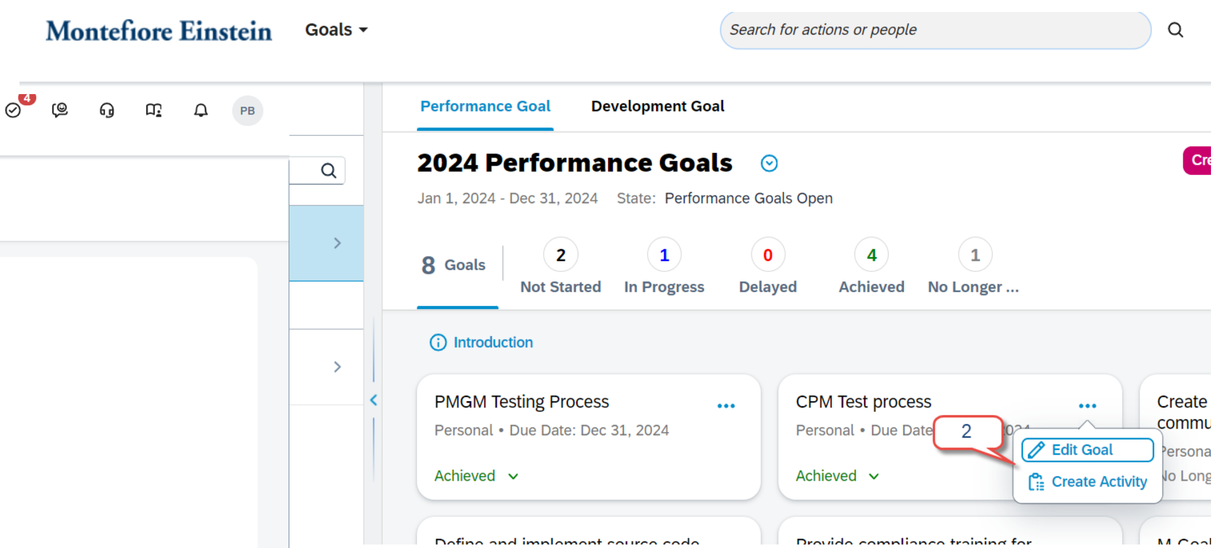
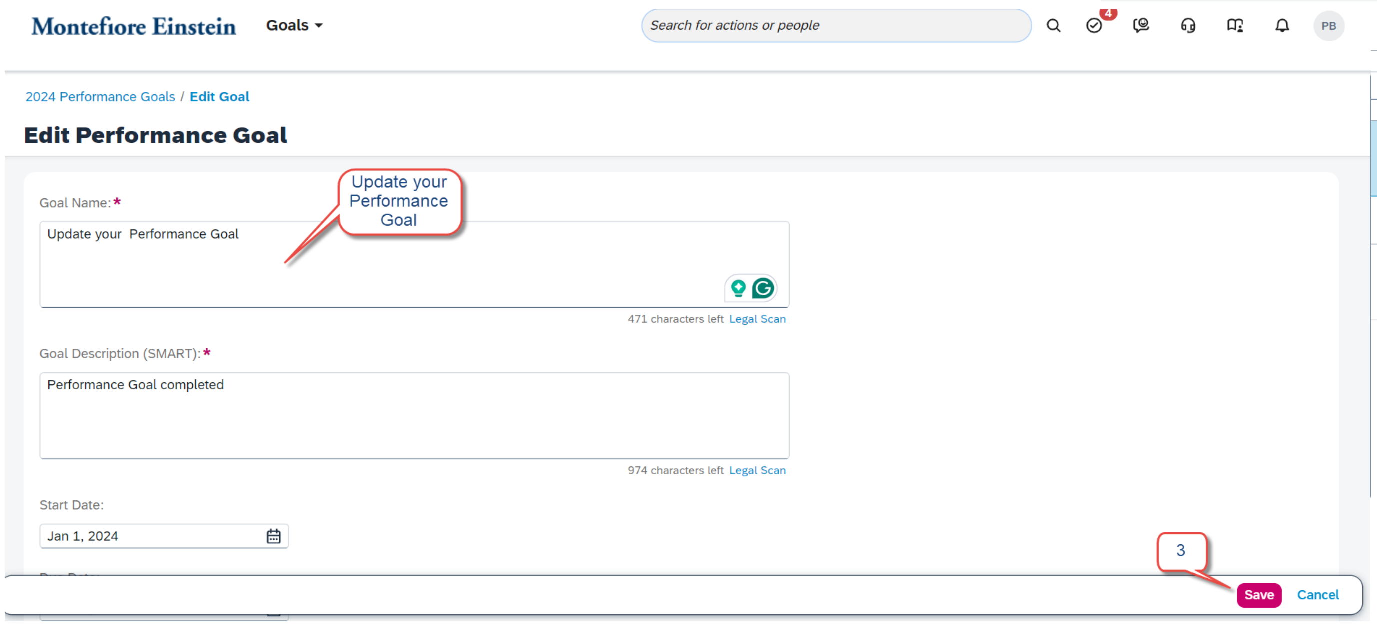
Updating Performance Goals

1. Click the **Home** menu dropdown and navigate to **Goals**
2. Click **Edit Goal**
3. Update and save





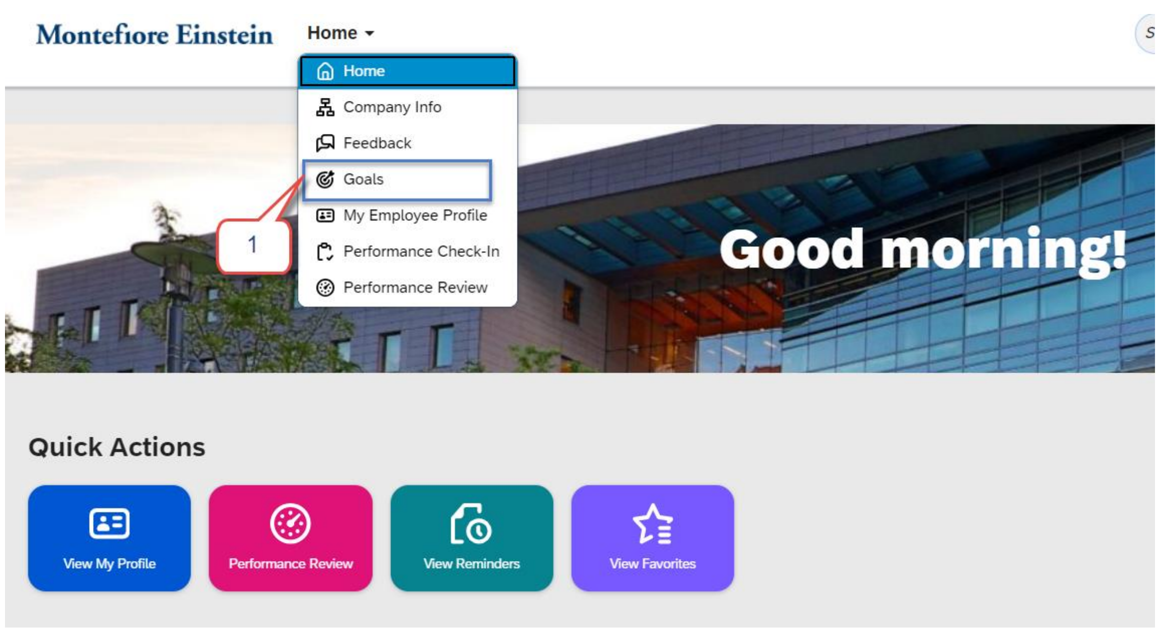


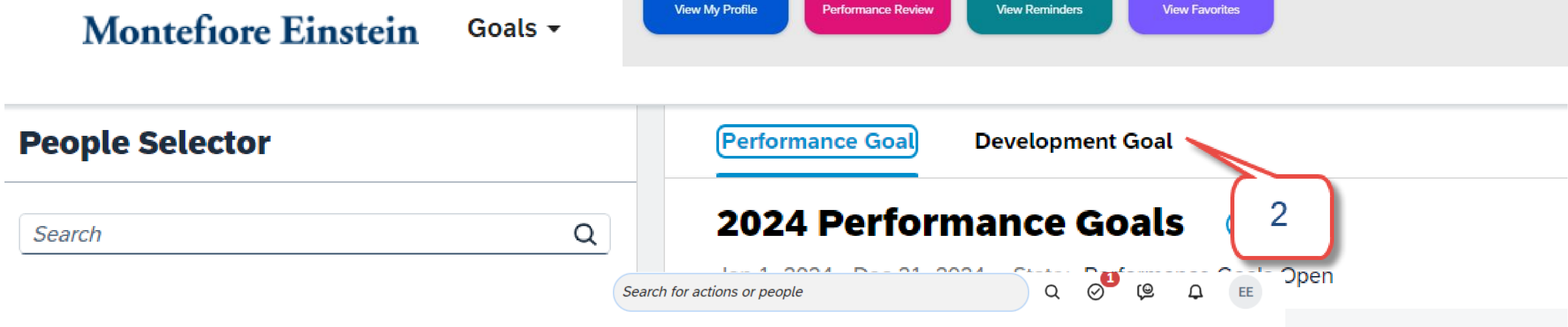
Development Goals

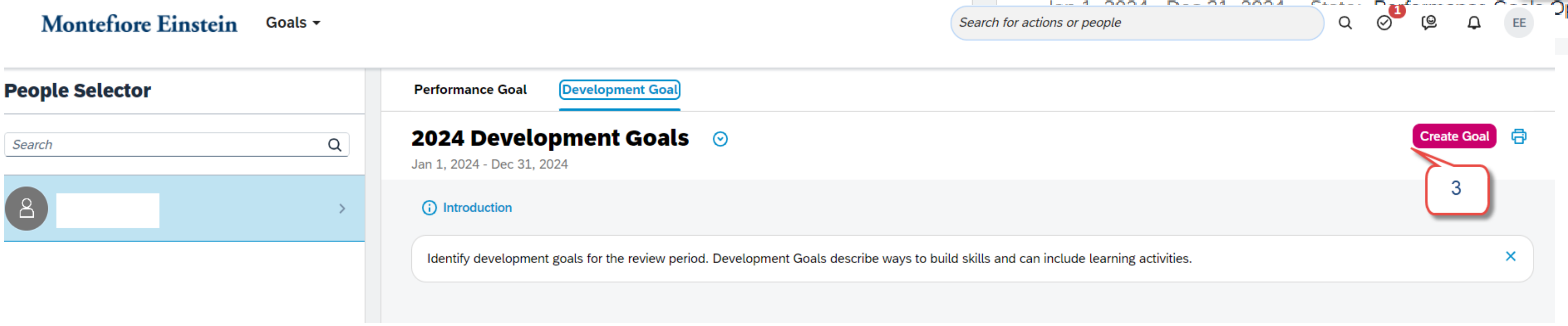
Development goals are specific objectives that individuals set for themselves to enhance their skills, knowledge, and capabilities.

Creating Development Goals

1. Click the **Home** menu dropdown and navigate to **Goals**
2. Click the Development Goal Tab
3. Click Create Goal







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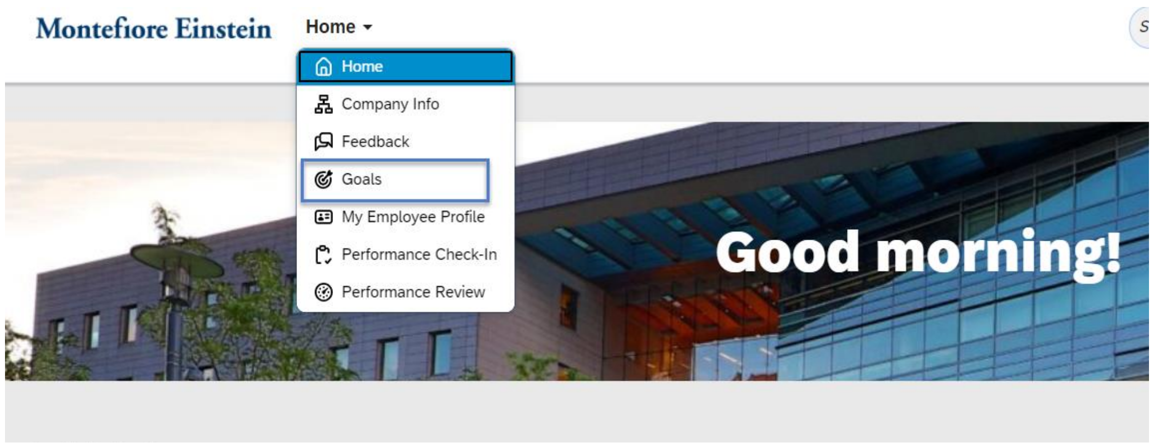
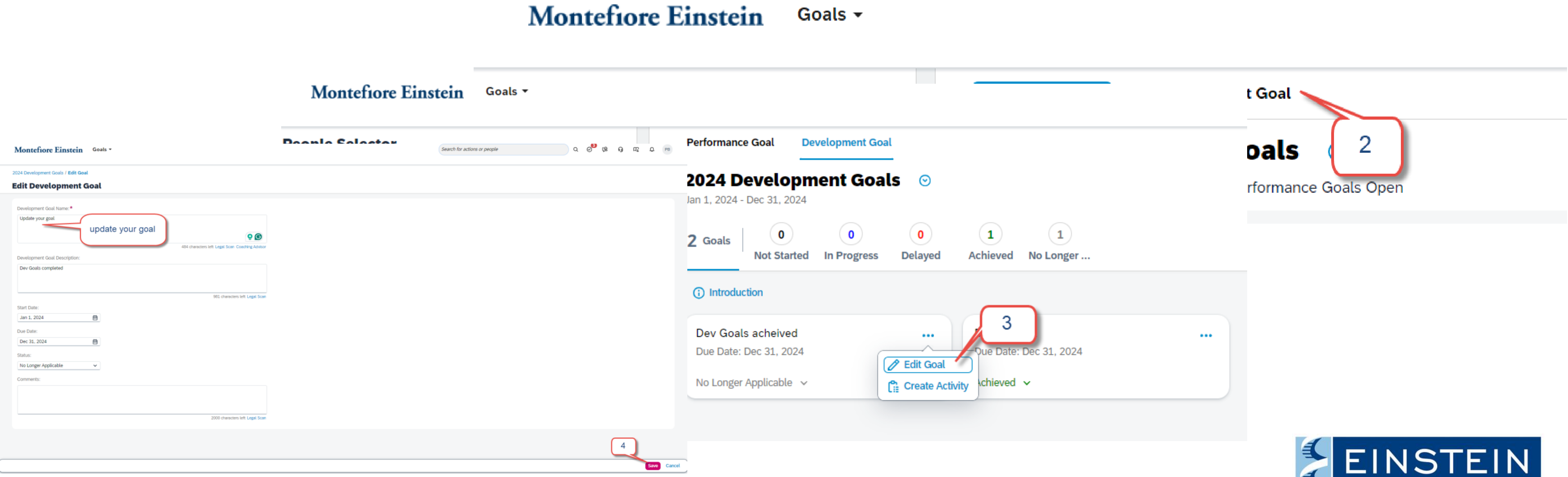
Updating Development Goals

1. Click the **Home** menu dropdown and navigate to **Goals**
2. Click the Development Goal Tab
3. Click edit goal and
4. Update and save.





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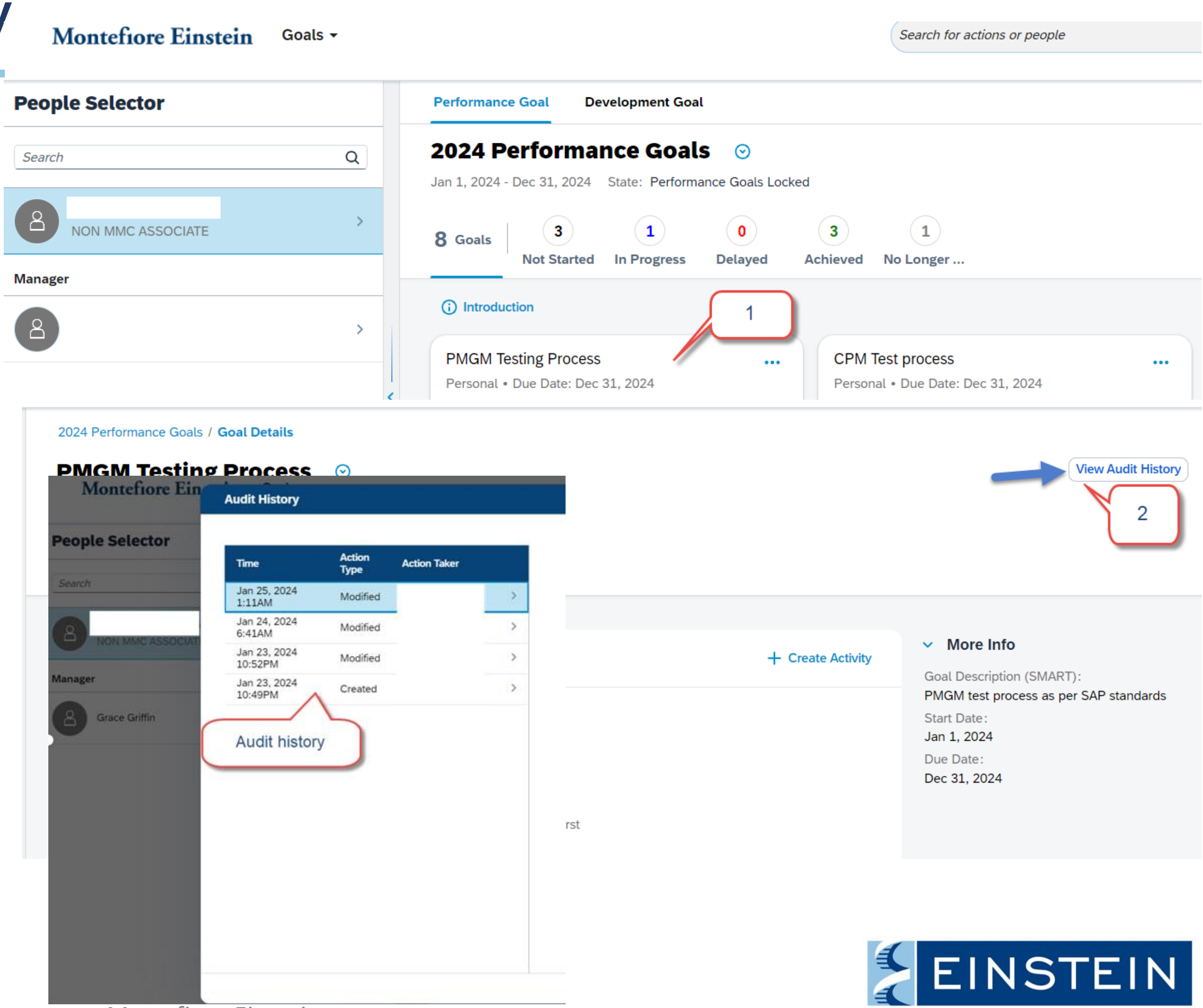
Goal Plan – Audit History

To View the Audit History of **Performance Goals** or **Development Goals**:

1. Click on a goal
2. Select **View Audit History**
3. You will see the audit history pop-up



Performance Check-In and Feedback

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Performance Check-In Overview

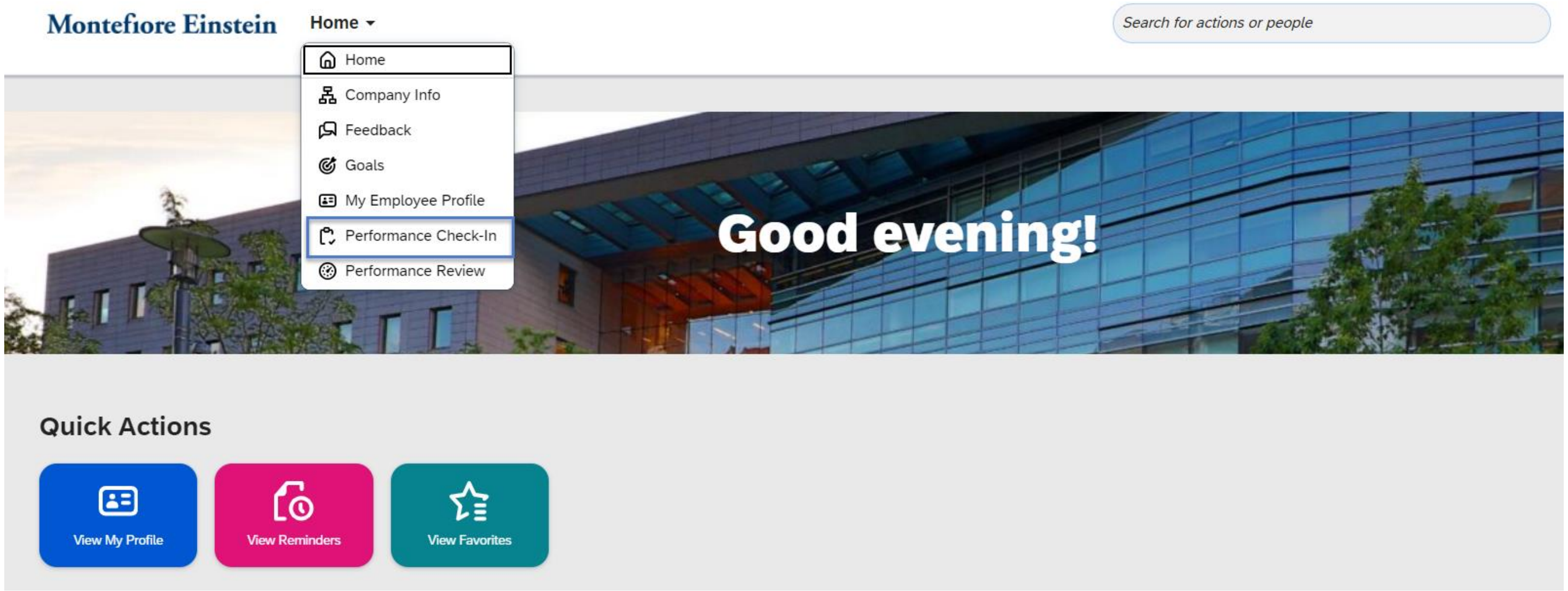
With Performance Check-In, employees get quick feedback on their work through frequent and structured conversations with their managers. Managers in turn, can track the progress of their team members.

In Performance Check-In you can:

- Create an activity (tasks that can be aligned to goals if desired)
- Create an achievement
- Request feedback
- Start a meeting discussion topic

Navigating to Performance Check-In

1. Upon logging in to SAP SuccessFactors, you will see the Home page. Click the **Home** dropdown menu from the upper-left part of the page.
2. Click **Performance Check-In**

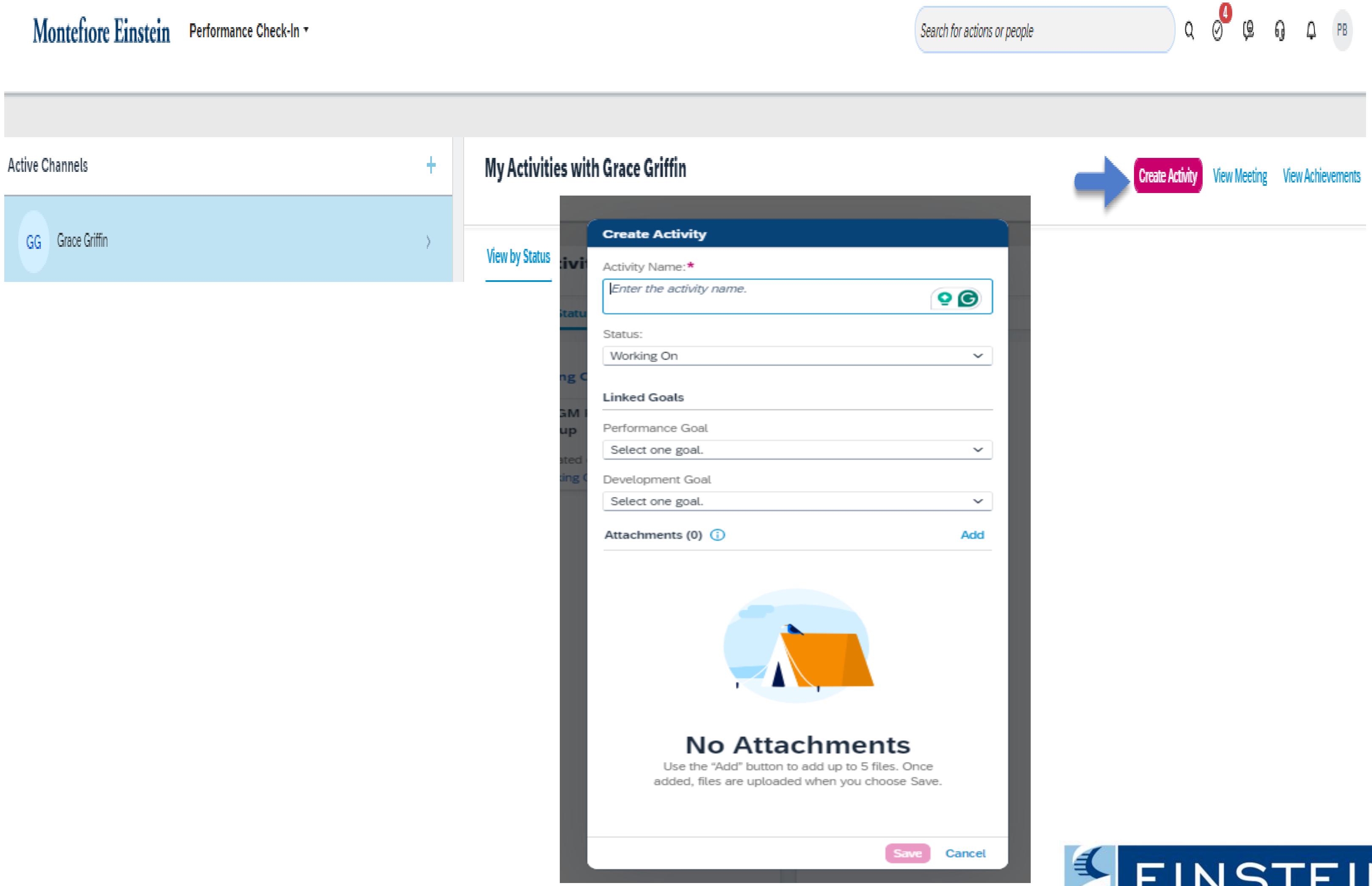


Create an Activity

The Employee and Manager can manage activities on this page.

To add a new activity:

1. Click the **Create Activity** button
2. On the pop-up window, you will be required to enter the activity name and select a status.
3. Optional: You can link this to a Goal
4. Select Save



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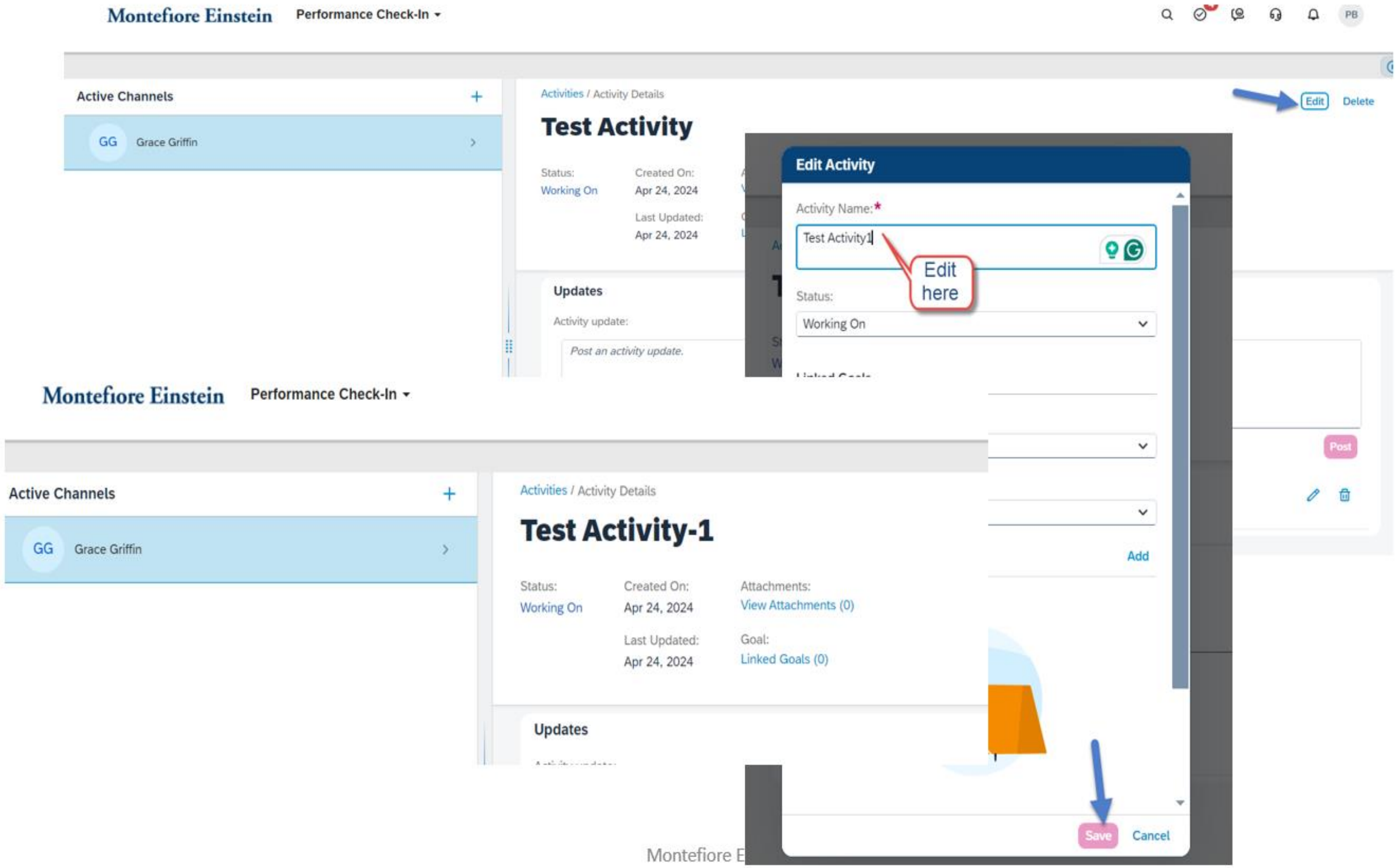
Edit an Activity

Once the activity is created you can edit the activity by selecting the activity and then:

1. Select edit on right side of the screen
2. Update your activity
3. Save the activity



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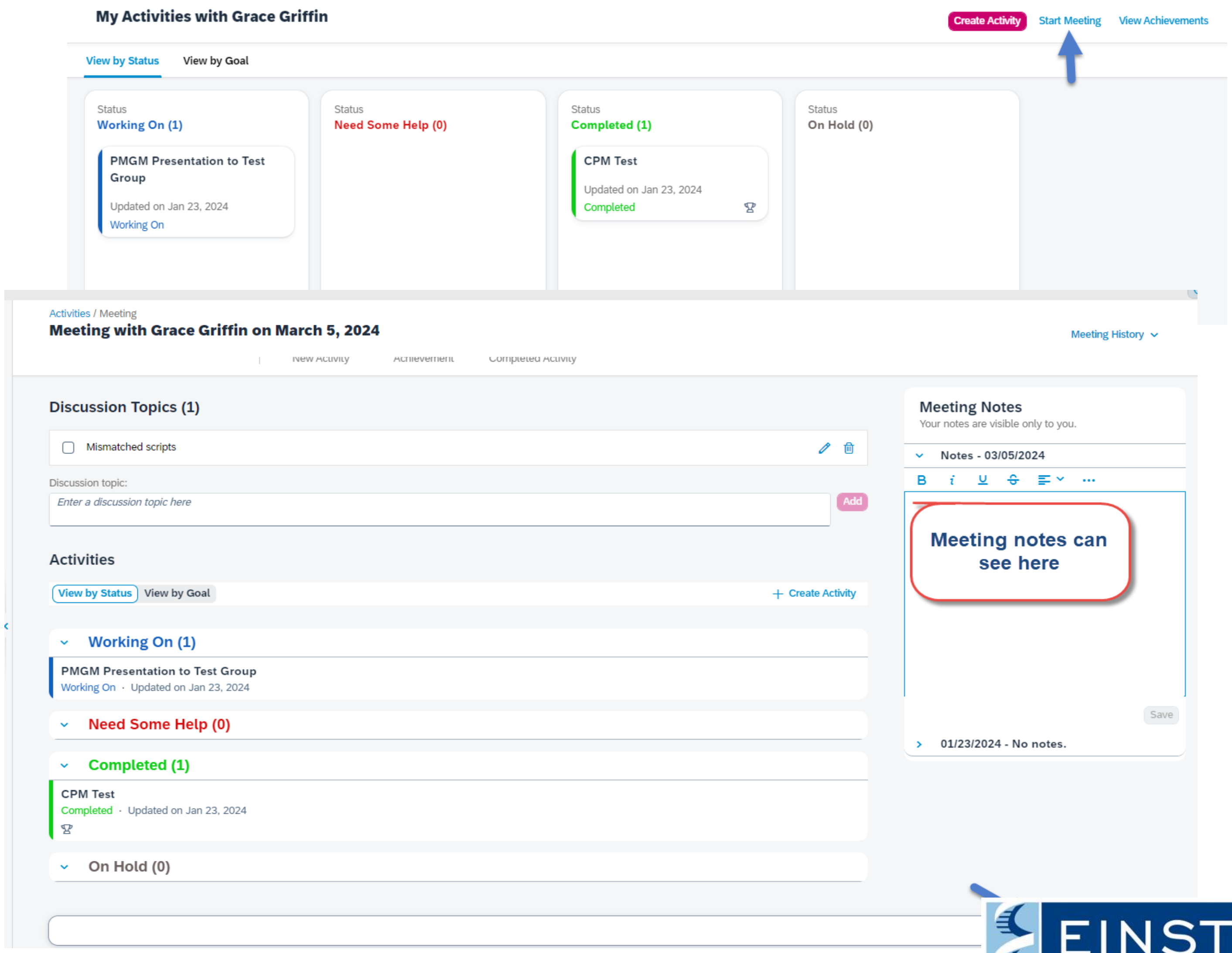
Meeting Notes

You can document a check-in by selecting **Performance Check-In** from the **Home** drop down menu and then **Start Meeting**.

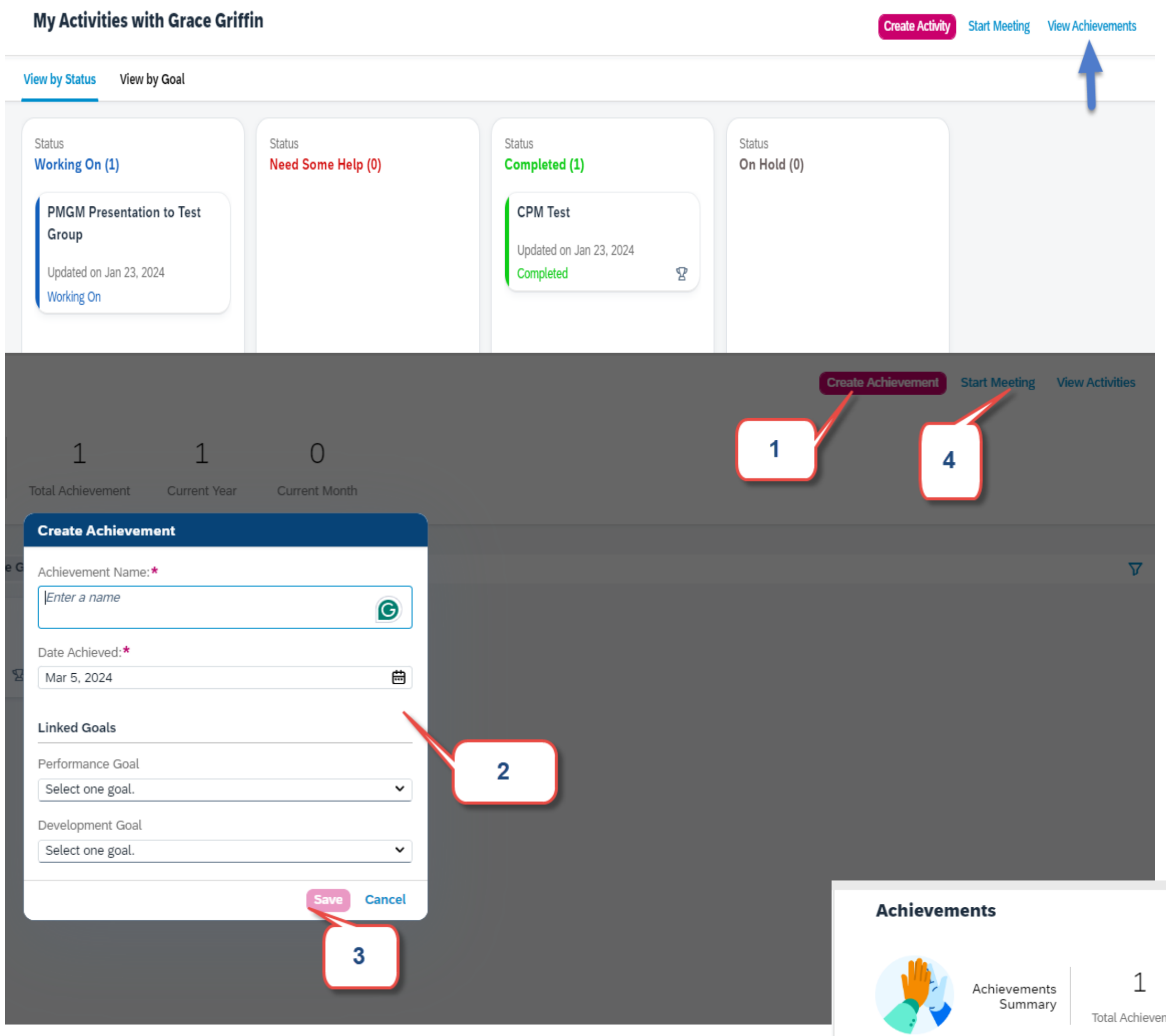
You can post updates to activities and goals during this meeting or at any time during the performance cycle.



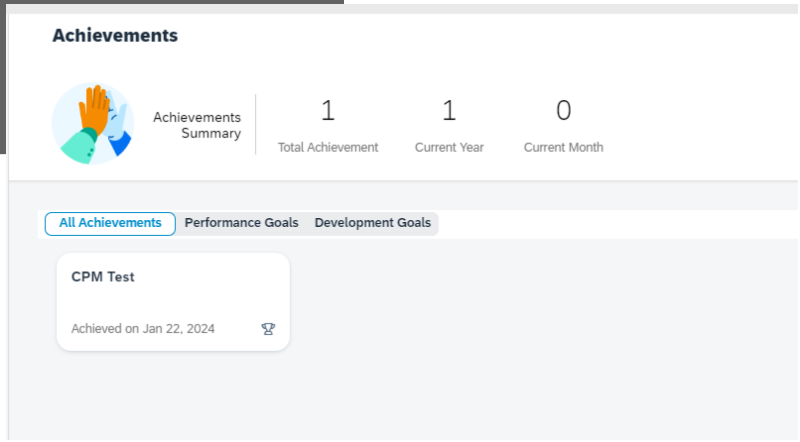
Achievements

Achievements record your accomplishments throughout the year. With this feature, you can quickly and easily capture the things you have achieved in the workplace.

1. Create achievements by selecting **View Achievements**
2. Add your achievement
3. Save
4. You can **Start Meeting** to take notes on your achievements during a meeting with your manager



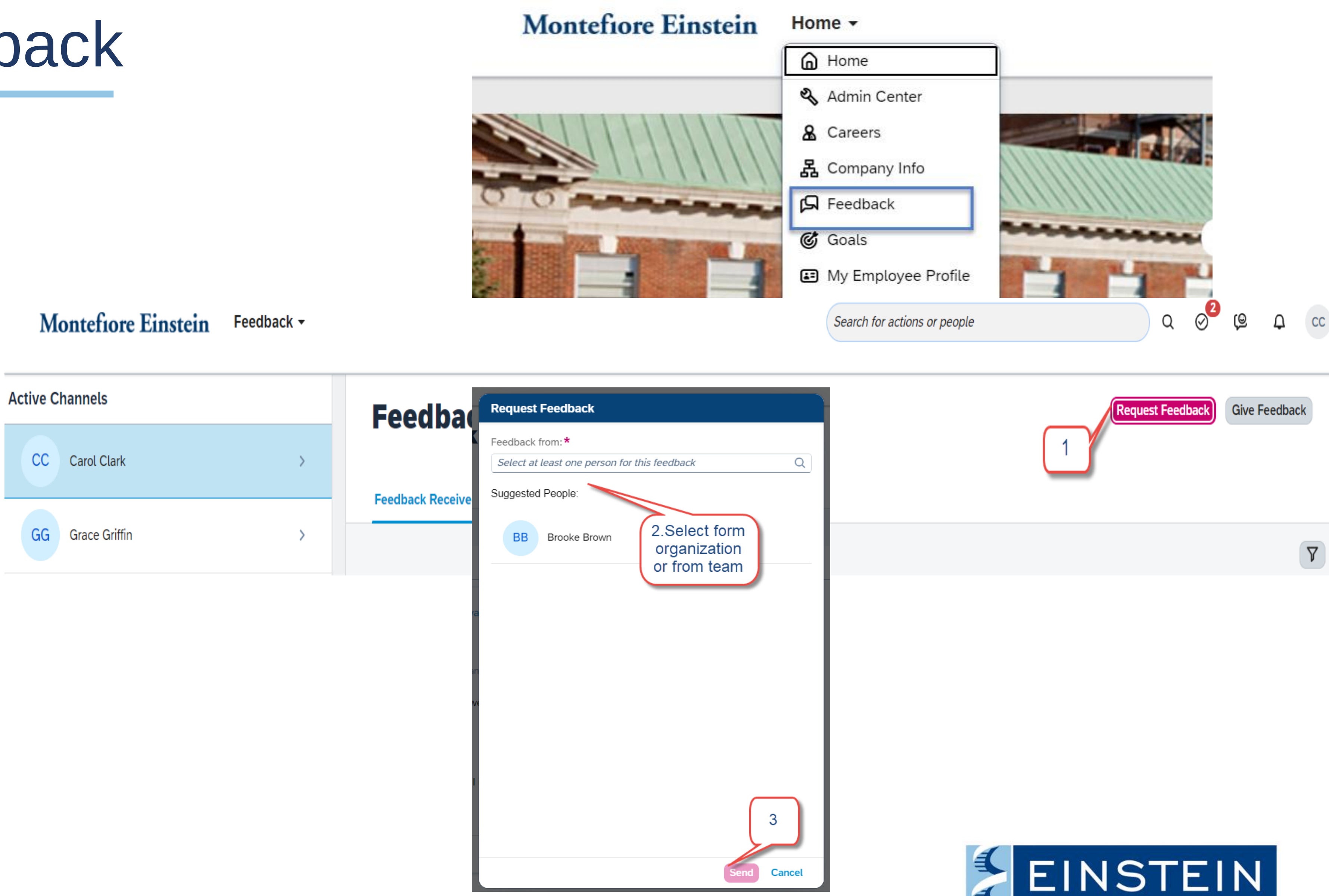
You can view your achievements:



Requesting Feedback

Click the **Home** drop down and select **Feedback**

1. Select Request feedback
2. Select anyone in the organization or from your team.
3. Send



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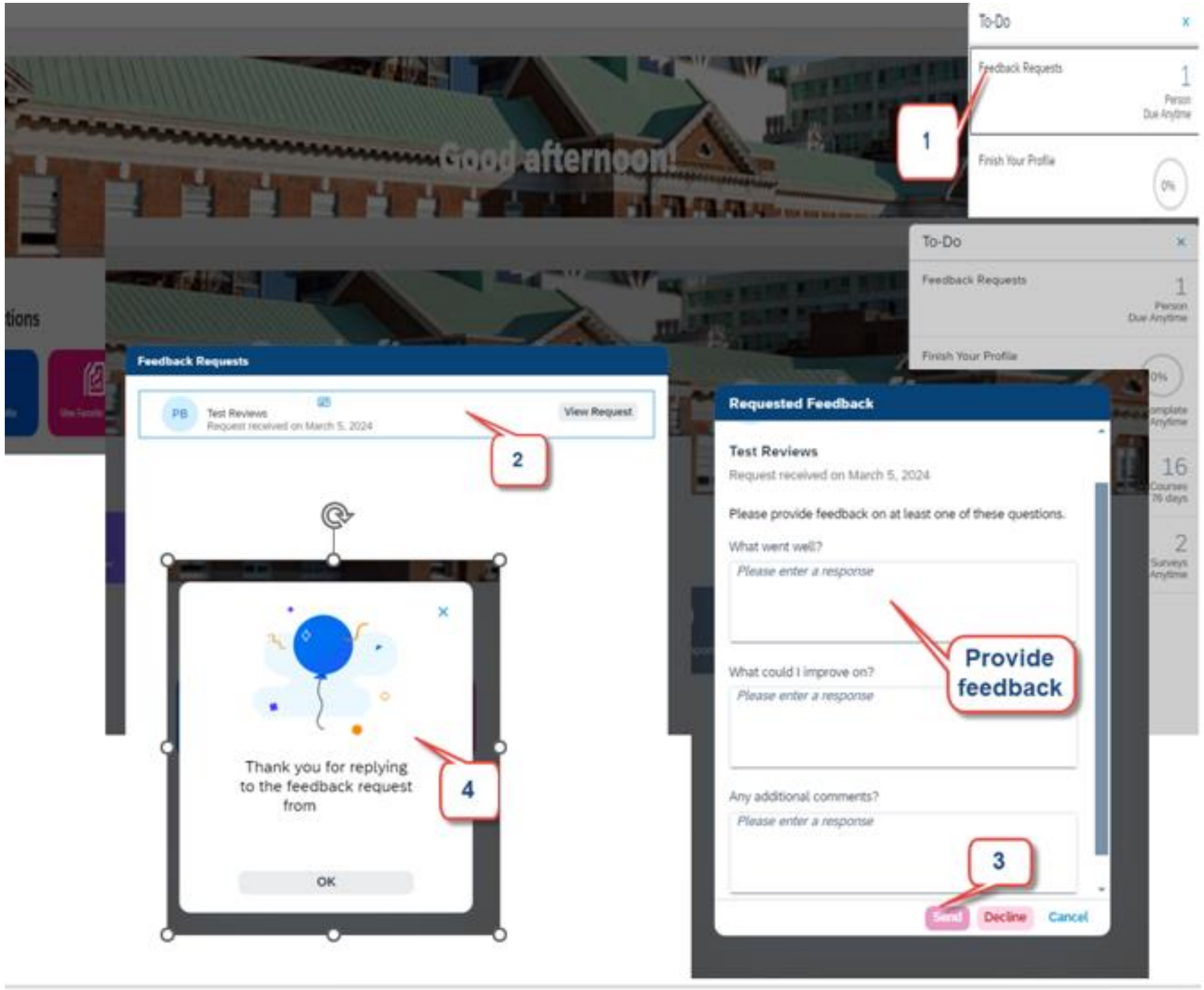
Provide Feedback

Click on Feedback via the Home page (in **To-Do** list on top right with check mark icon):

1. Click on Feedback Request
2. Click on View request
3. Provide required feedback and select send
4. You will see confirmation pop up



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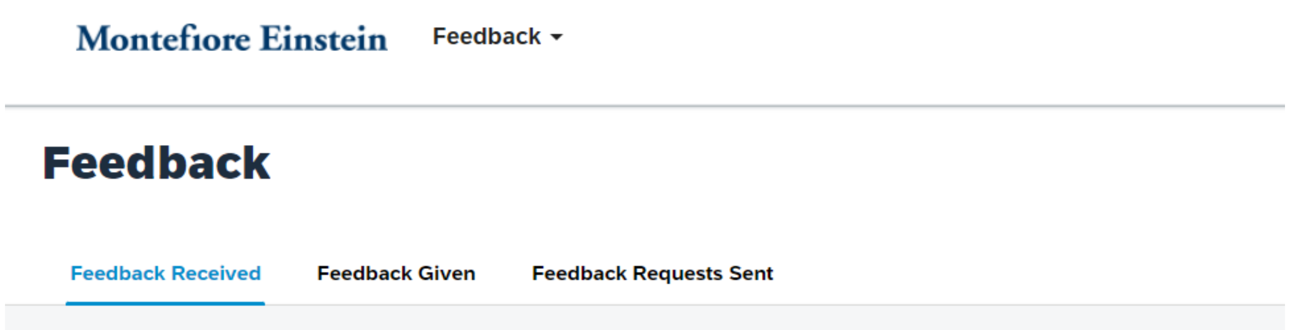
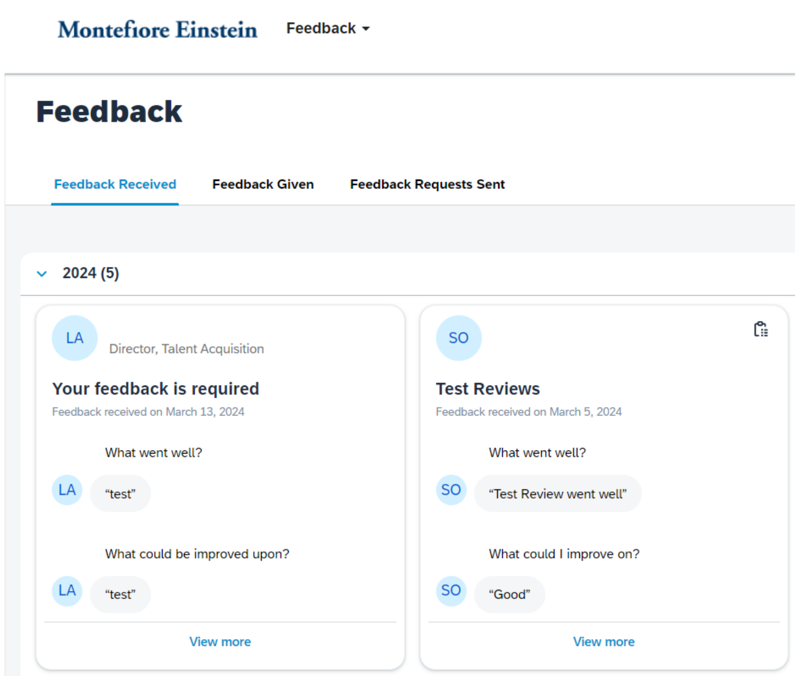
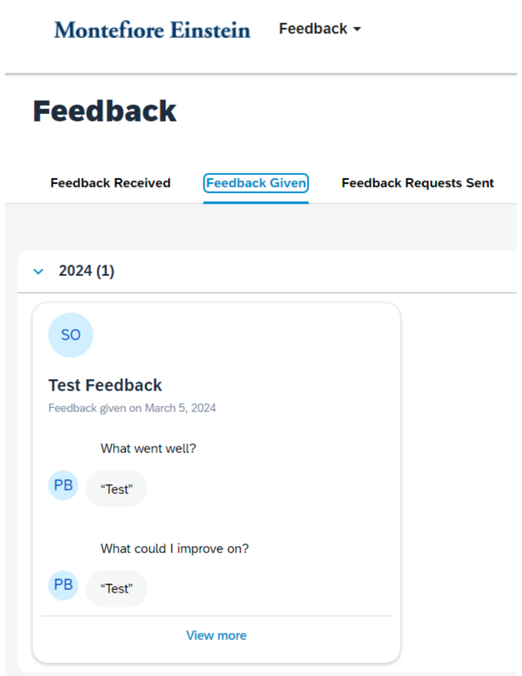
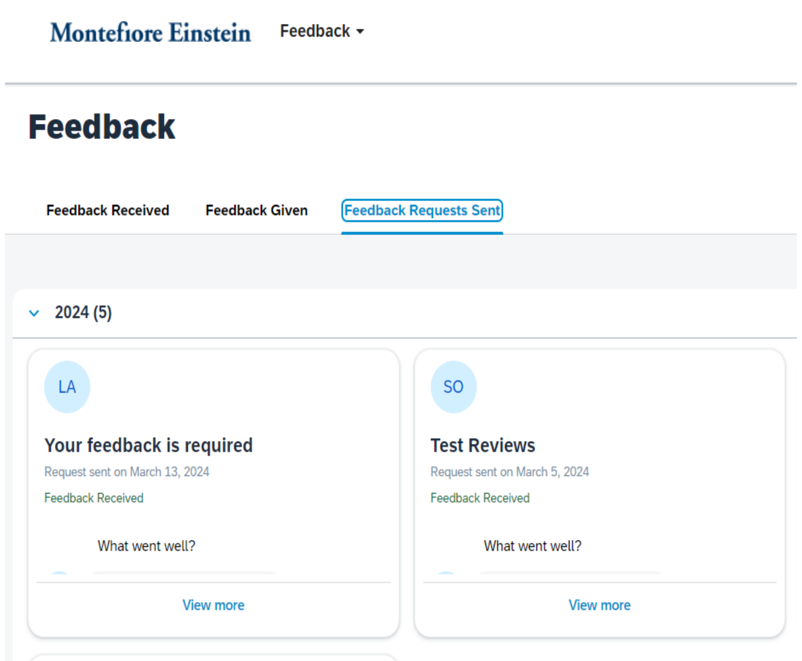
View Feedback

You can View Feedback Received, Feedback Given, Feedback Sent tabs









Employee Self Assessments and Year-End Reviews

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Employee Review Process

SuccessFactors Performance Management streamlines the employee review process. It gives you powerful tools to capture individual employee performance accurately, clearly, and objectively for an engaged, focused, and highly productive workforce.

The year-end review process ensures that employees have an opportunity to provide their feedback on their performance in addition to capturing the manager's feedback.

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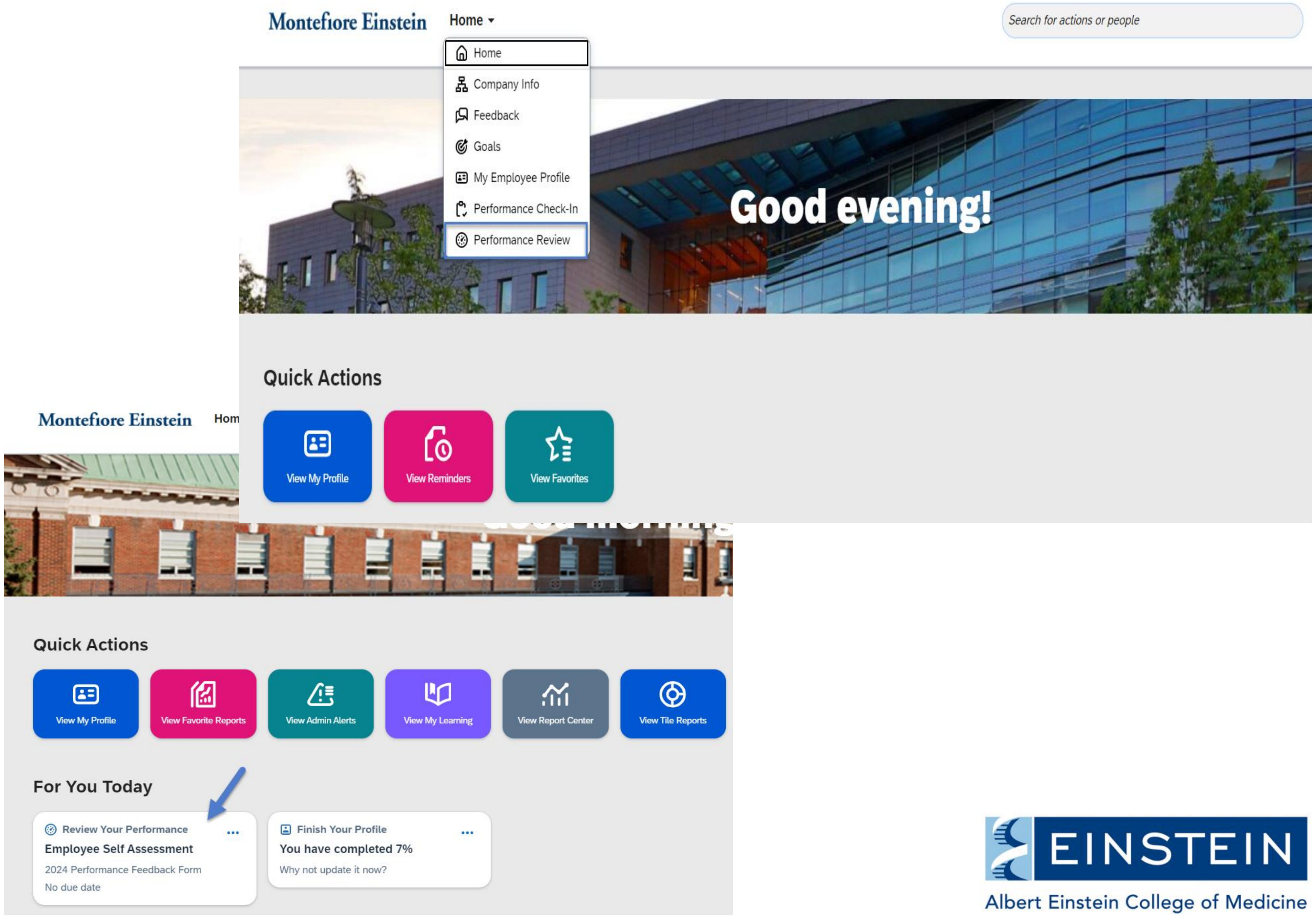
Accessing Performance Review Forms via the Home Page

1. Click the **Home** drop down menu from the upper-left part of the page. Click **Performance Review.**
2. Tasks related to performance steps are listed as To Do items on the Home page and become active links to the form when user input is required.



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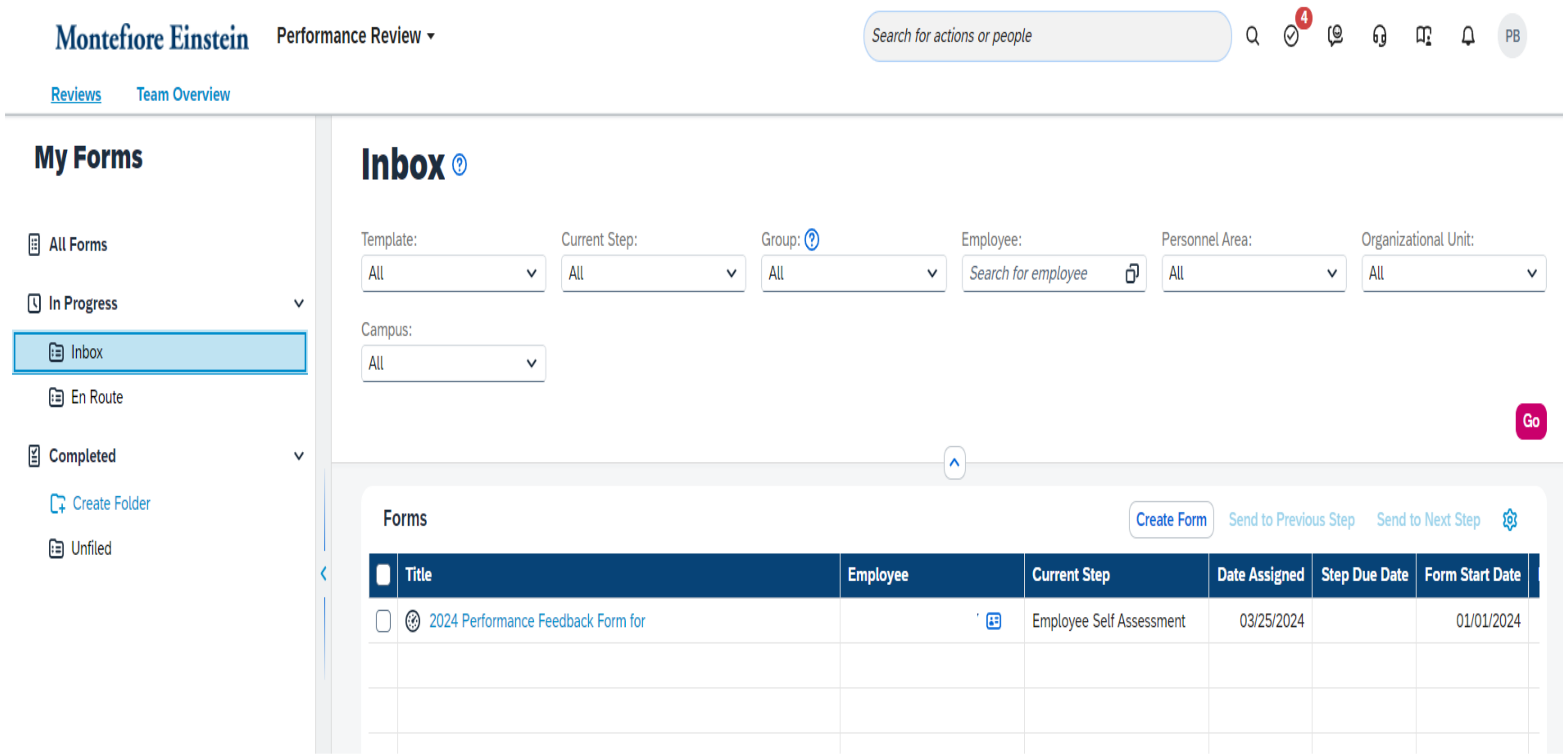
Accessing Performance Review Forms via the Inbox

- Upon logging in to SAP SuccessFactors, you will see the **Home page**. Click the **Home** dropdown menu from the upper-left part of the page.
- Click **Performance Review**
- From the Home page, another way to access the performance review is by clicking the **Performance Tile** on the Homepage.
- You will be directed to your performance **Inbox**. Click on the form link to access the form.



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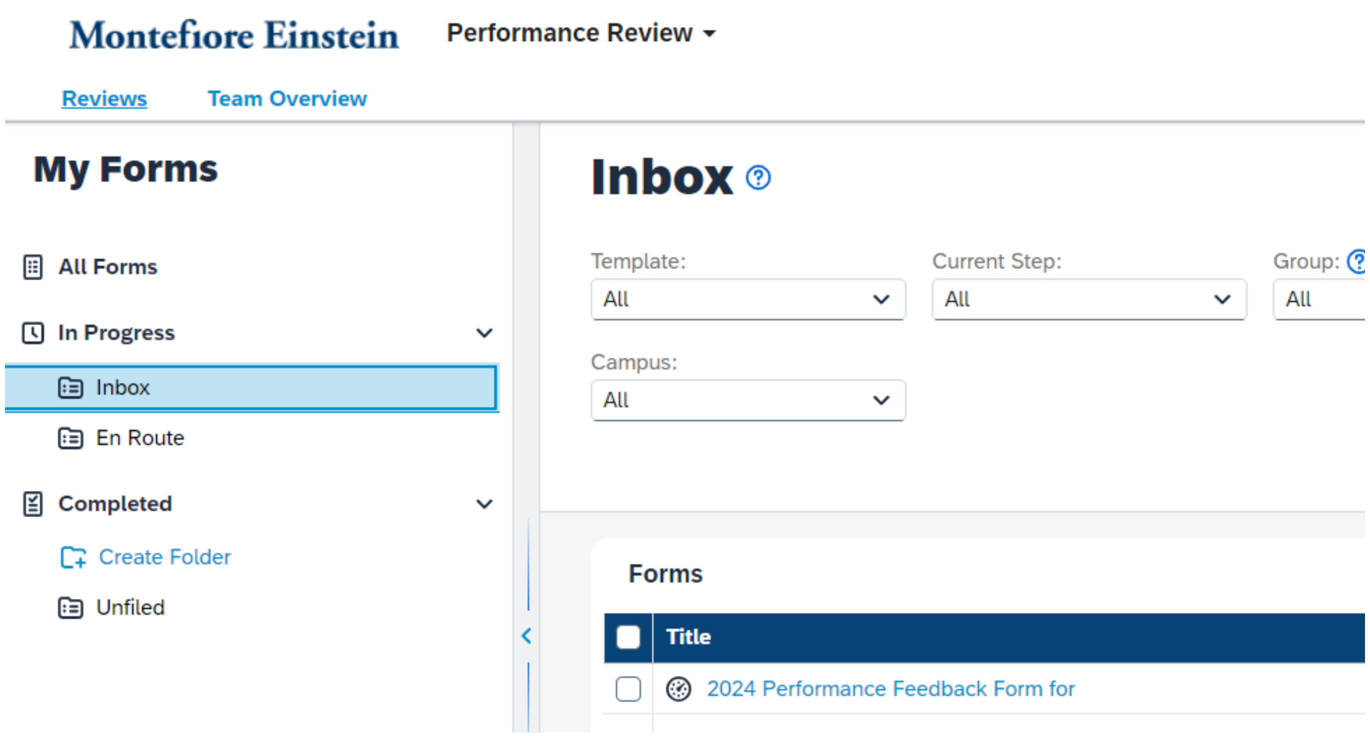
Performance Page Folders

Under the Reviews tab, you can access In-Progress and Completed Forms.

- **All forms** - Shows all of your performance forms
- **In Progress**:
  - **Inbox** - Manages all the forms requiring your input.
  - **En Route** - Stores read-only copies of all the active forms you have worked on and sent to other people for action.
- **Completed** - Stores read-only copies of all the active forms you have worked.



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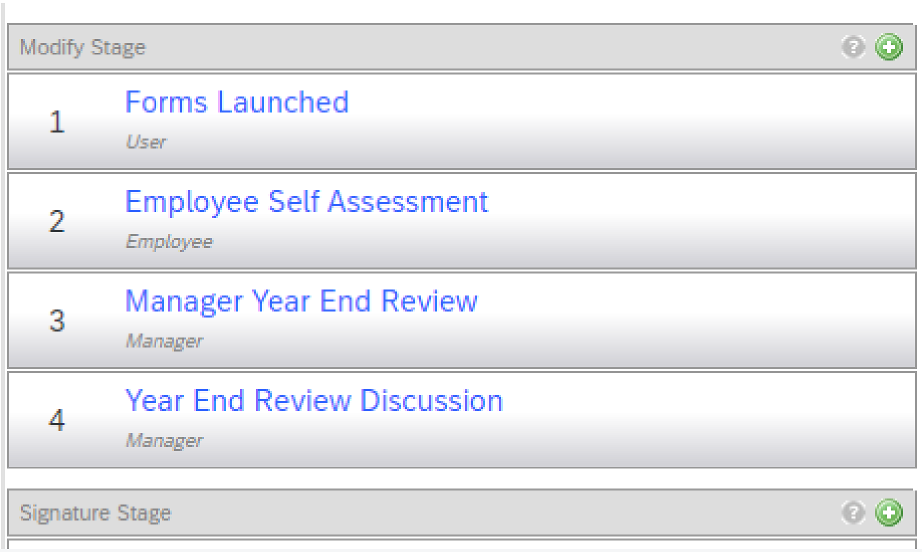
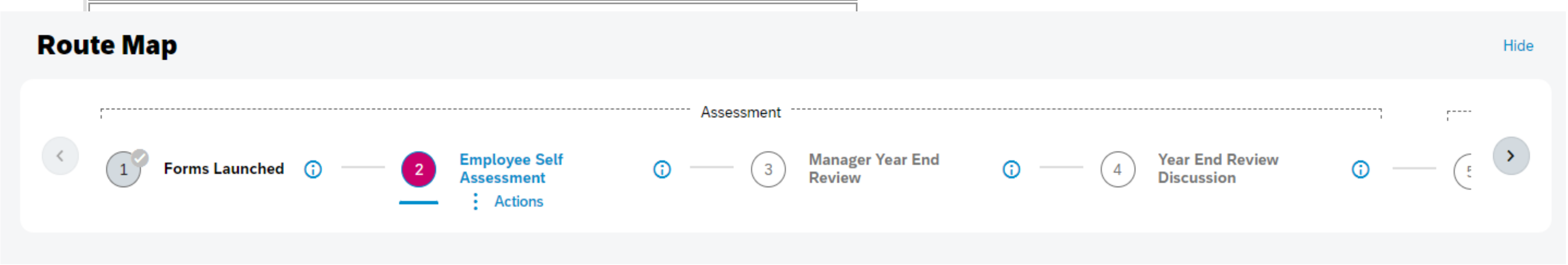
Performance Process Flow Route Map

The route map shows the order of the steps performance forms follow.





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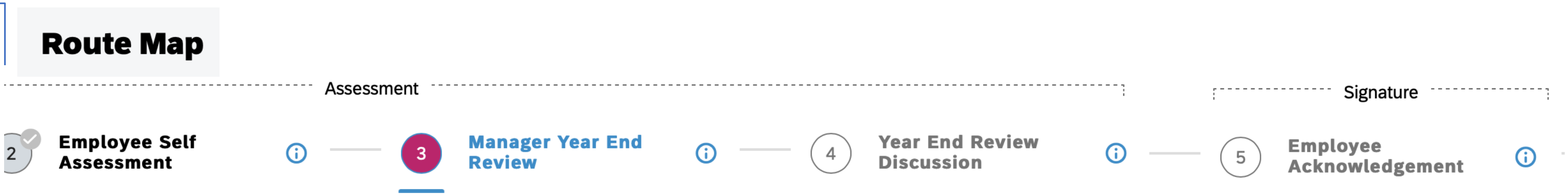
Performance Form Steps

The route map shows the order of the steps performance forms follow.

The Route Map will be viewable at the top of the form. Check marks indicate that a step is complete, and the current step number is highlighted in pink.



Performance Forms will go through the following steps after they are launched:

1. Employee Self-Assessment
2. Manager Year End Review
3. Year End Review Discussion (Employee and Manager)
4. Employee Acknowledgement

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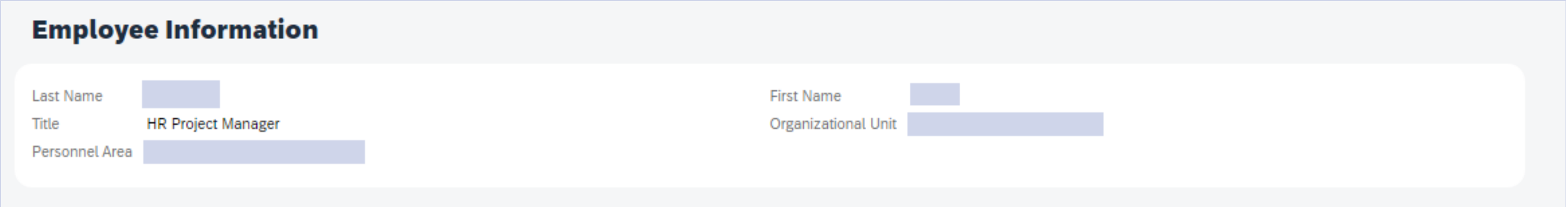
Performance Form Sections

Employee Information



Employee Information

Last Name

First Name

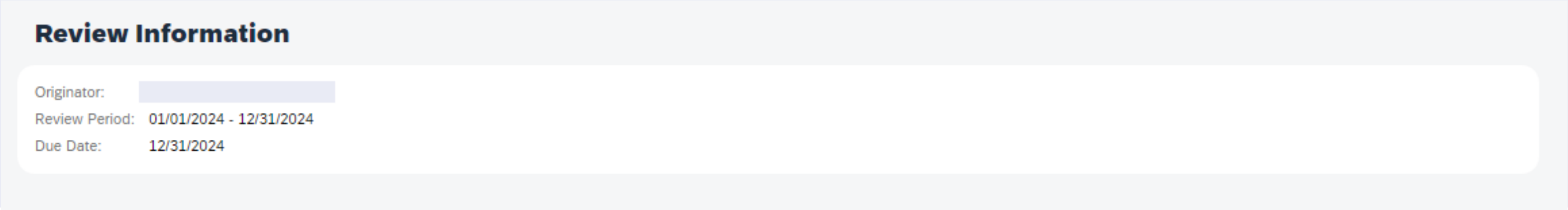
Title: HR Project Manager

Organizational Unit

Personnel Area

Review Information

Shows the Originator who launches the form, the review period, and due date.



Review Information

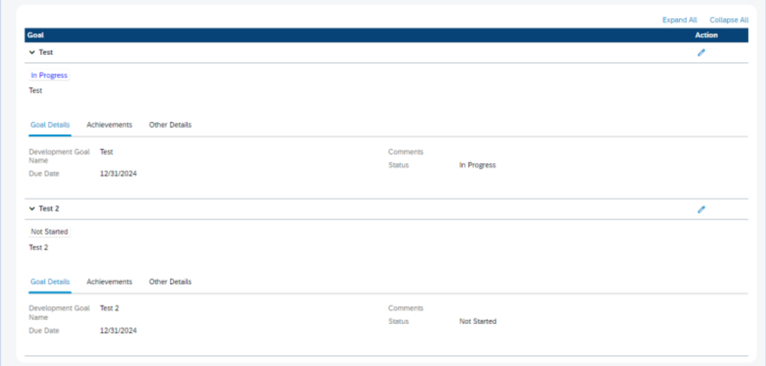
Originator:

Review Period: 01/01/2024 - 12/31/2024

Due Date: 12/31/2024

Goals Section

Performance Goals and Development Goals will automatically populate in this section.



Expand All · Collapse All

Goal	Action
Test	

In Progress

Test

Goal Details · Achievements · Other Details

Development Goal Name: Test

Due Date: 12/31/2024

Comments

Status: In Progress

Goal	Action
Test 2	

Not Started

Test 2

Goal Details · Achievements · Other Details

Development Goal Name: Test 2

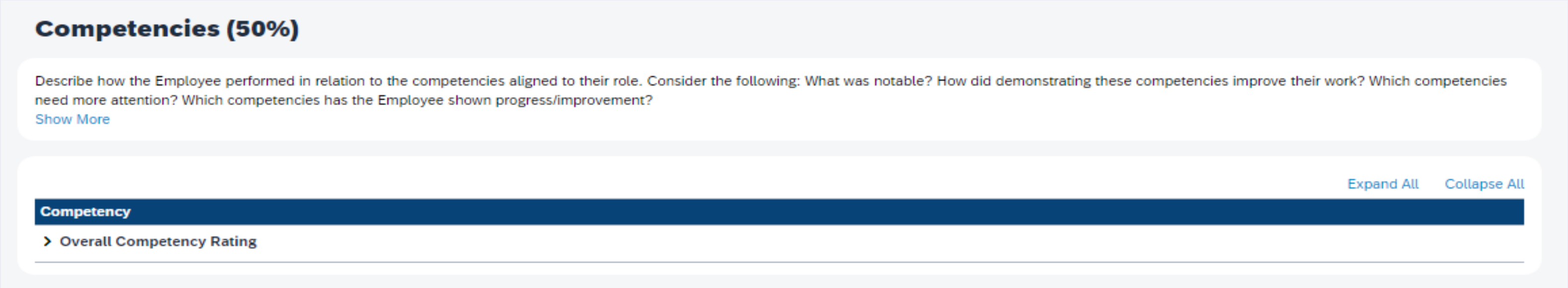
Due Date: 12/31/2024

Comments

Status: Not Started

Job Competencies

aligned to the role



Competencies (50%)

Describe how the Employee performed in relation to the competencies aligned to their role. Consider the following: What was notable? How did demonstrating these competencies improve their work? Which competencies need more attention? Which competencies has the Employee shown progress/improvement?

Show More

Expand All · Collapse All

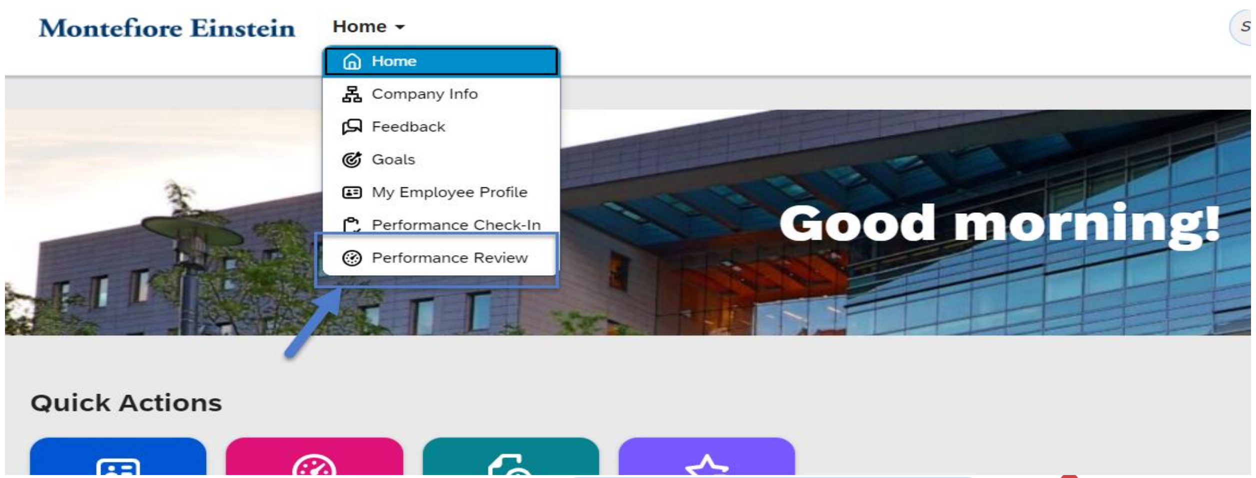
Competency
Overall Competency Rating

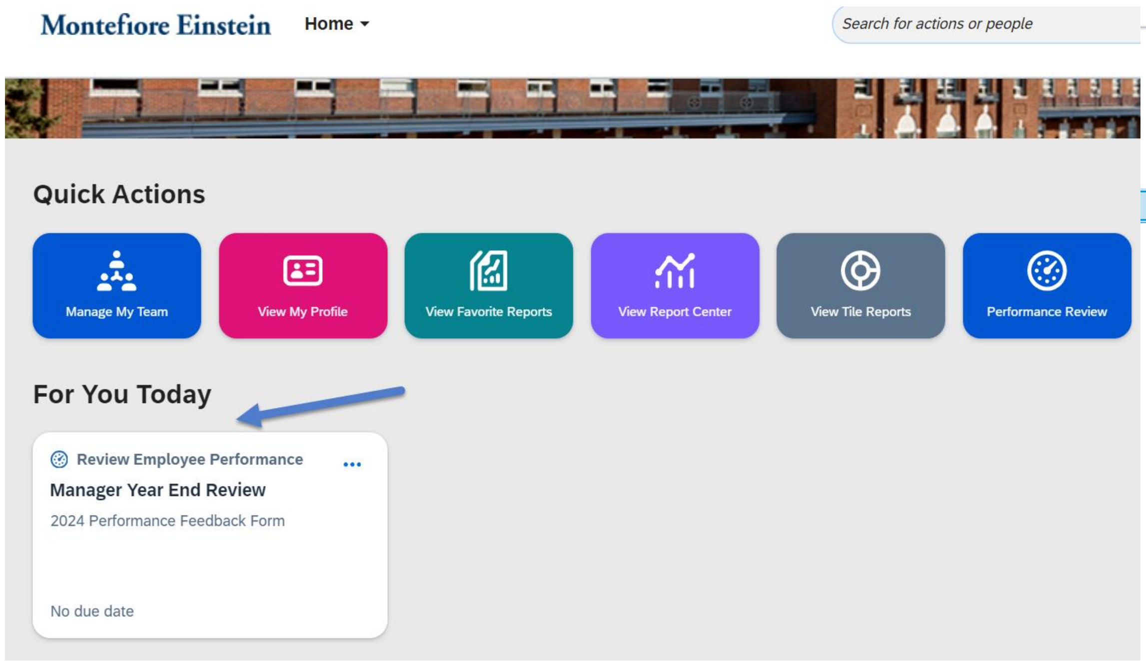
Comment Sections

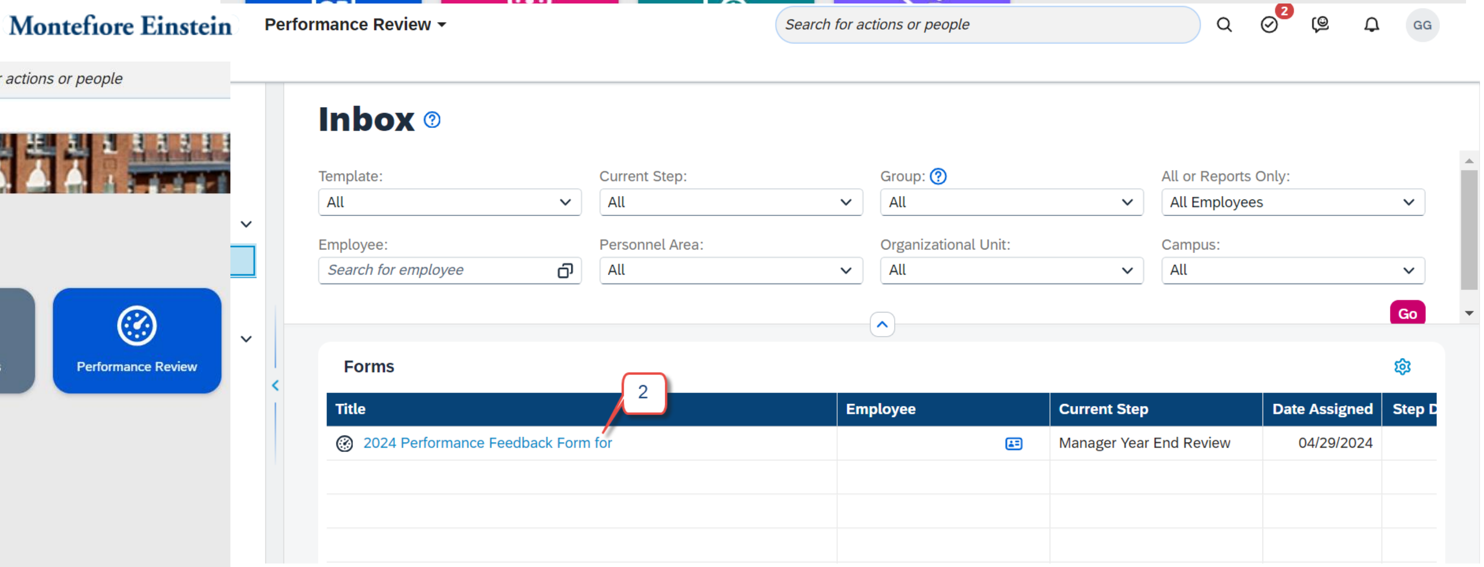
Multiple areas for employees and managers to comment

Manager Performance Review

1. Select **Performance Review** from the **Home** drop down
2. Click on the **2024 Performance Feedback Form** for a direct report (when in the Manager Year End Review step)







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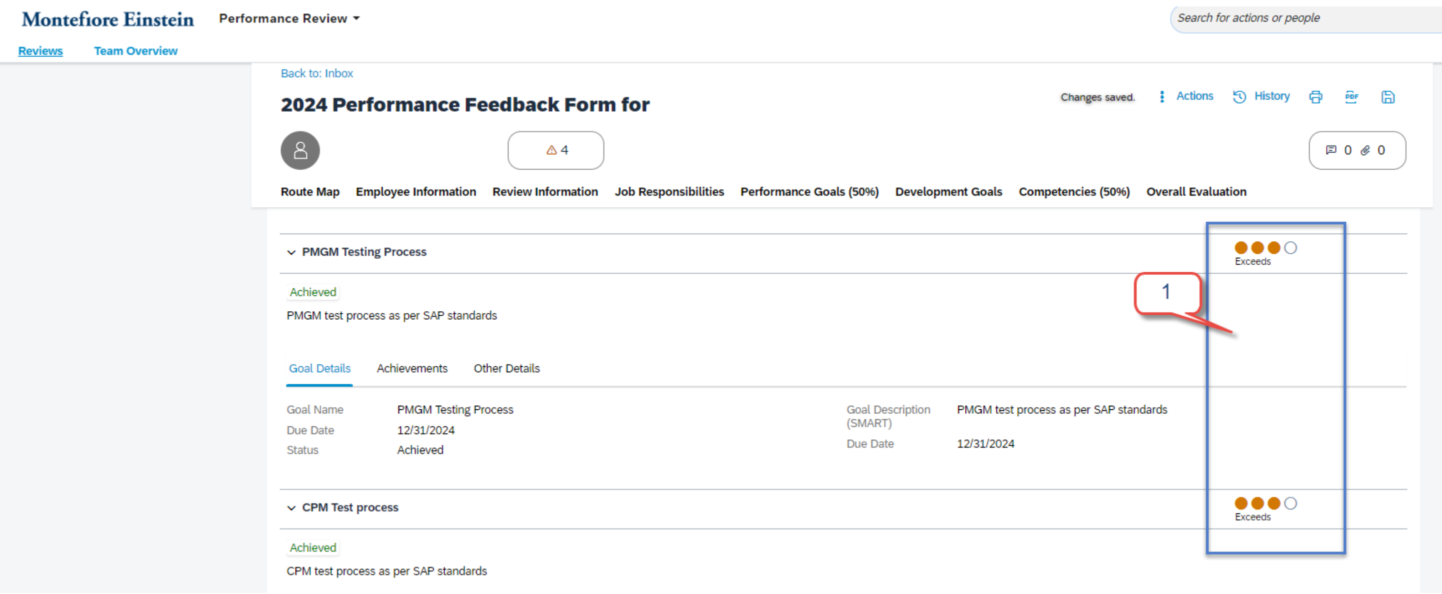
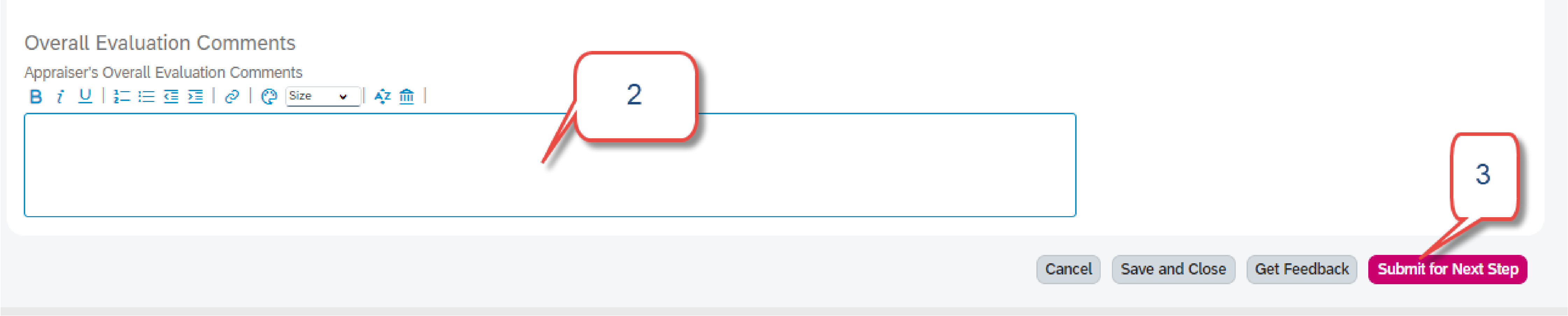
Ratings and Comments

1. **Complete the ratings** and **comments** in the Competency and Performance Goal sections
2. Add manager overall comments
3. Click **Submit for Next Step** button





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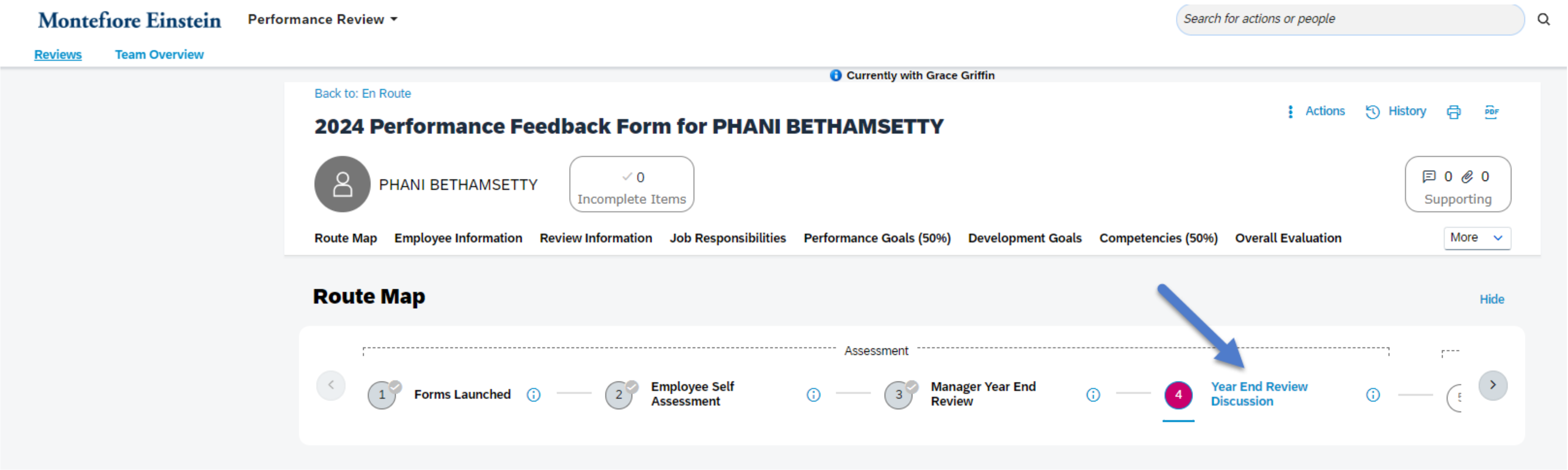
Manager Meets with Employee Step



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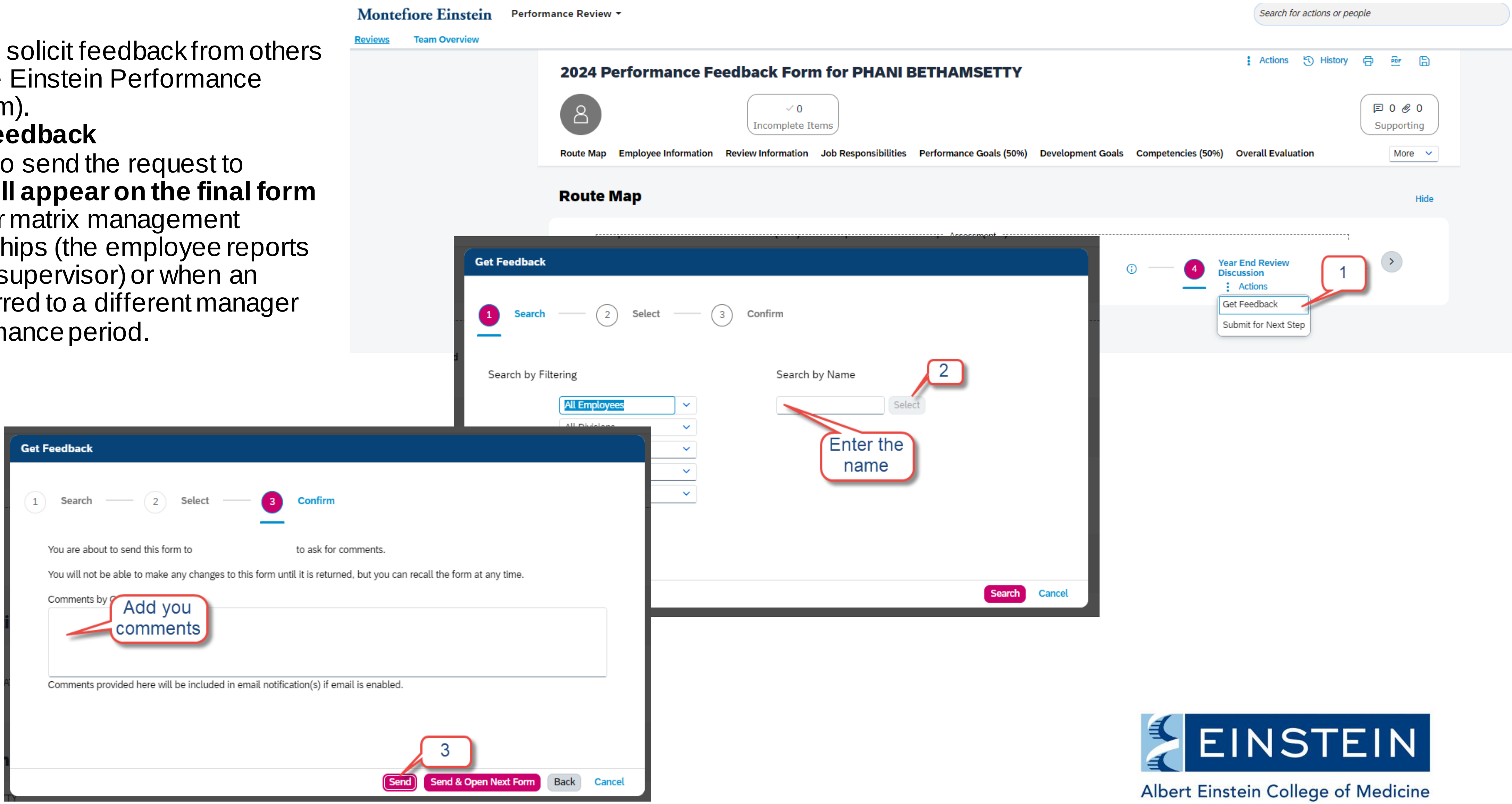
Requesting Feedback From the Form

There are **two methods to request feedback while you are writing an employee's review.**

Get Feedback (to solicit feedback from others participating in the Einstein Performance Feedback Program).

1. Click **Get Feedback**
2. Select who to send the request to

This feedback will appear on the final form and is effective for matrix management reporting relationships (the employee reports to more than one supervisor) or when an employee transferred to a different manager during the performance period.



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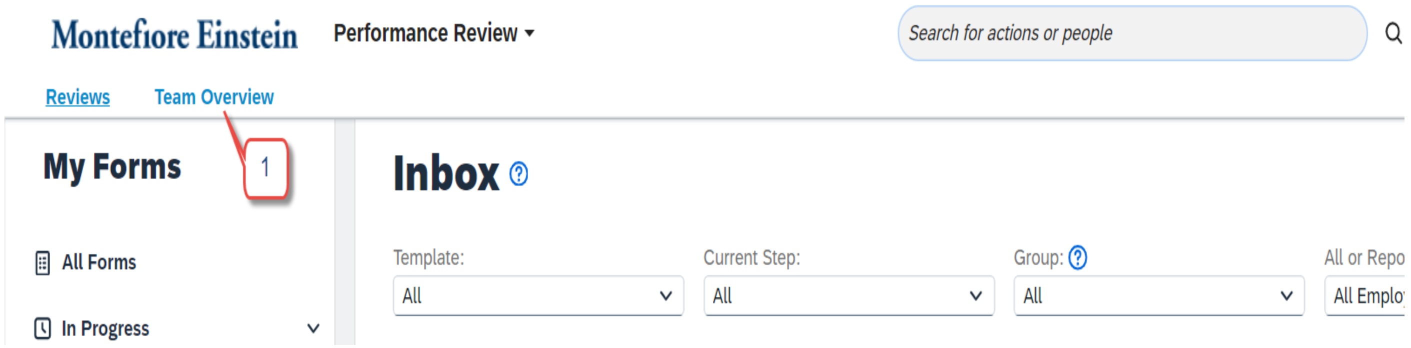
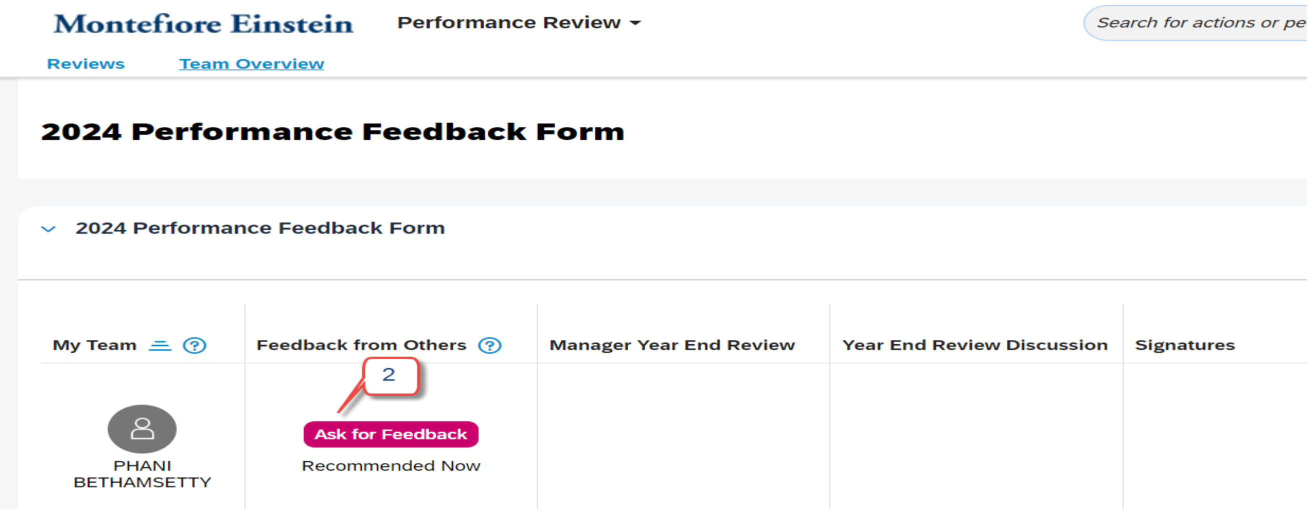
Requesting Feedback From the Form

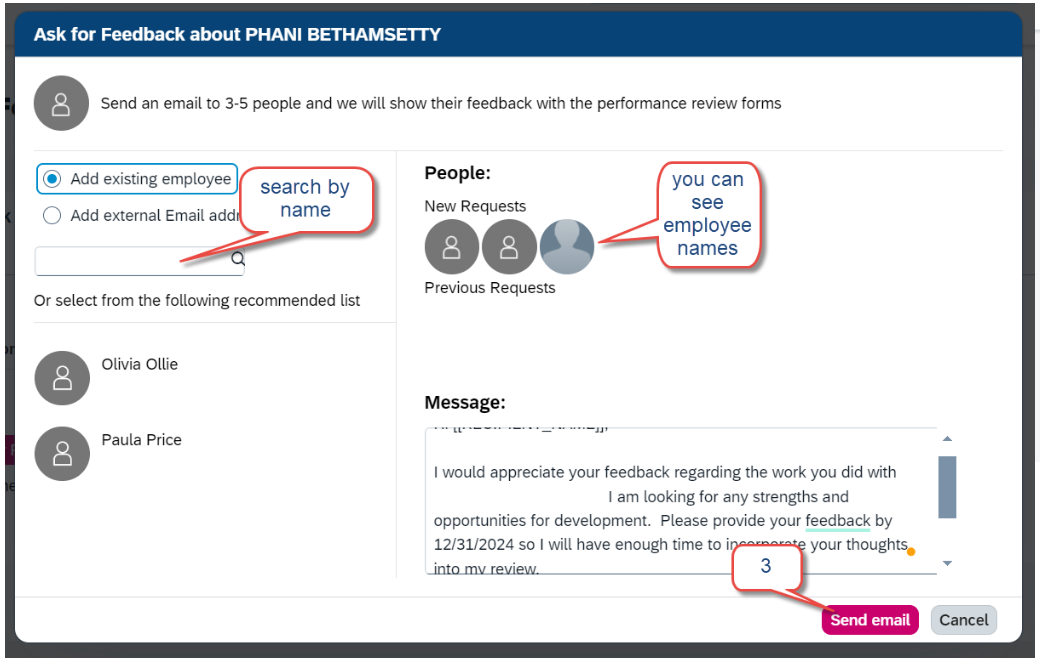
There are **two methods to request feedback while you are writing an employee's review.**

Team Overview

1. Select **Team Overview**
2. Select **Ask for Feedback** and send this request to one or more internal and external people (regardless of their participation in the Einstein Performance Feedback Program.)







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For Additional Information:

Visit the **Performance Feedback Program** section of the **Learning Network** intranet site for additional training resources.

For questions related to the Performance Feedback Program or using the SuccessFactors system, please email: **einstein-performancefeedback@einsteinmed.edu**