SuccessFactors: Phase 2
Annual Review Process

Presented by:
Patricia Kelly / VeLonda Dantzler
Human Resources Management
Agenda/Purpose

• Overview of Phase 1

• To familiarize you with Phase 2
  – Performance Evaluation Process
  – Evaluation Form

• To provide instructions on how to access, send and complete the Evaluation Form

• Q&A
Review of SuccessFactors

Phase 1
What is it?

- A new online performance management system that automates the **Goal Management Process** and the information that will “populate” the **Performance Evaluation**

- Two types of forms: **Planning Stage document** and the **Evaluation document**
<table>
<thead>
<tr>
<th>Current process</th>
<th>New process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual paper process</td>
<td>Automated process</td>
</tr>
<tr>
<td>Scores manually calculated</td>
<td>Scores automatically calculated</td>
</tr>
<tr>
<td>Performance forms manually routed for signatures</td>
<td>Performance forms routed electronically</td>
</tr>
<tr>
<td>Multiple printed copies of forms</td>
<td>Forms stored electronically</td>
</tr>
<tr>
<td>Data entry required by HR</td>
<td>Eliminates data entry by HR</td>
</tr>
<tr>
<td>Review dates throughout year</td>
<td>Universal review date (Aug. 1)</td>
</tr>
</tbody>
</table>
Navigating The System
Access the online performance management system using your web browser. You will receive automated notification (emails) when you need to participate in the process.
The **Home Tab** is where you access all the activities and processes in the system.
Position Description for VELOnda Yvette Dantzler

You may access training and other reference materials here: MUHA Training

Add Position Description Requirements below; Information added here will automatically populate on the performance review form.

You may view commonly used requirements and duties here:
MUHA Clinical Jobs
University Position Templates

You may access the Physical Requirements here:
MUHA Physical Requirements
University Physical Requirements

No Direct Reports

Displaying 1-1 of 1 Goals

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Purpose</td>
<td>Ability to perform job functions in an upright position (Frequent) Ability to perform job functions in a seated position (Frequent) Ability to perform job functions while walking/mobile (Frequent) Ability to climb stairs (Infrequent) Ability to climb ladders (Infrequent) Ability to work indoors (Continuous) Ability to bend at the waist (Infrequent) Ability to twist at the waist (Infrequent) Ability to squat and perform job functions (Infrequent) Ability to perform pinch operations (Infrequent) Ability to use both hands/arms (Frequent) Ability to perform repetitive motions with hands/forearms/elbows and shoulders (Frequent) Ability to reach in all directions (Frequent)</td>
</tr>
<tr>
<td>Requirements (Education, Work Experience, License, Registry and/or Certifications)</td>
<td>Bachelor's degree and two years of experience in human resources management programs. Previous experience delivering training seminars and workshops desired. Must have the ability to analyze training and development needs and resources. Must be able to communicate clearly and effectively to diverse groups of individuals. Must be able to formulate ideas for training sessions, develop training classes (that appeal to a diverse audience) and on occasion, present training sessions. Ensure that applicable federal and state training requirements are met. This includes equal access for all MUHCA University employees to participate in training and development. Must possess the ability to work independently under limited supervision. Must possess a high level of initiative and be creative. Must be familiar with different training methods and the impact of these methods upon the audience. The Training Coordinator should have the ability to determine and develop training courses designed to support the needs, vision and values of individuals, departments within MUHC and the university. The Coordinator will be responsible for the daily oversight of one Administrative Assistant who will support the Training Section of HRM.</td>
</tr>
<tr>
<td>Physical Requirements</td>
<td></td>
</tr>
</tbody>
</table>
1. Click the goal name to open the goal edit window.

2. The total cumulative weight now displays at the top of the screen.

3. If your weight does not equal 100%, you get a warning message which displays, telling you that you are under or over 100%.

4. This does not prevent you from saving the records or from leaving the screen; it is merely a visible reminder.
Performance Tab – Organizing Forms

My Forms tab stores all of your current and archived forms indefinitely.

En Route lists all forms requiring actions by others.

Completed stores copies of all your completed forms in a read only format.

Form Status enables managers to monitor performance process progress of team members.
Performance Tab – Organizing Forms

1. Click on the Performance tab.
2. Select the desired form status (In Progress, Inbox, En Route, Completed).
3. View the form details, including title, employee, step, date assigned, and other relevant information.
SuccessFactors: Phase 2
Annual Review Process
Manager/Supervisor Verification: Manager receives form, confirms that all form sections are complete (job responsibilities, position description, etc., confirms goal section weights equal 100%. When ready manager clicks “Send to Next Step.”
**Employee Self-Review:** Employee receives form, conducts self-review by providing ratings and comments throughout the form as appropriate. When ready the employee clicks “Send to Next Step.”
Opt Out Acknowledgment Option

Standards of Behavior

Complies to University Standards of Behavior by:
- Supporting the mission of the Medical University of South Carolina through adherence to its policies, procedures, and Code of Conduct
- Maintaining a safe workplace through the adherence of safety and security protocols
- Being accountable for the appropriate use of time and resources
- Displaying an outstanding attitude, maintaining an appropriate/professional appearance, and being fully accountable for interactions with customers, coworkers, and the MUSC leadership
- Delivering exemplary customer service, including AIDET and the 10/5 rule
- Appropriately sharing information without violating confidentiality
- Promoting cooperation among all members of the MUSC community
- Supporting and embracing diversity in a respectful environment

Definitions/Success Criteria:
- 4: Role model. Consistently displays exemplary behavior for others to follow or emulate and exceeds expected behavioral norms. Typically exceeds expected behavioral norms. Anticipates the needs of customers and provides service that meets or exceeds expectations. When faced with challenges or problems, identifies the issues and develops solutions without waiting to be directed to do so. Works collaboratively with co-workers and customers to implement solutions to challenges or other problems. An individual that routinely receives positive acknowledgment from customers.
- 3: Exhibits all of the expected standards of behavior, and displays many of the behavioral characteristics of a role model, just not as consistently or completely.
- 2: Exhibits behavior that is consistent with Standards of Behavior. Does what is necessary. May need coaching to improve one or more areas of expected behavior.
- 1: Consistently exhibits behavior that fails to meet one or more of the Standards of Behavior.

Rating by DANA S. TUMBLESTON:

Rating: UNRATED

Section Comments:

Employee Comments:

Employee Self-review Opt Out Acknowledgement

Please place a check in the checkbox should you choose to not participate in the employee self-review process.

By checking this section you are informing your supervisor that you do not wish to provide input to the review process prior the supervisor rating your review.

[ ] Employee Self-review Opt Out Acknowledgement: Option

Comments by VELONDA YVETTE DANTZLER:

Rating by VELONDA YVETTE DANTZLER:

Rating: UNRATED

- 4.0 - Role Model Behavior
- 3.0 - Models standards of behavior most times
- 2.0 - Models standards of behavior inconsistently
- 1.0 - Does not model standards of behavior.
Manager Review: Manager receives forms, and provides ratings and comments throughout the evaluation as appropriate. Manager can also print the form prior to sending to the employee.
### Rating the Employee

**Definitions/Success Criteria:**
- **4**: Role model. Consistently displays exemplary behavior for others to follow or emulate and exceeds expected behavioral norms. Typically exceeds expected behavioral norms. Anticipates the needs of customers and provides service that meets or exceeds expectations. When faced with challenges or problems, identifies the issues and develops solutions without waiting to be directed to do so. Works collaboratively with co-workers and customers to implement solutions to challenges or other problems. An individual that routinely receives positive acknowledgement from customers.
- **3**: Exhibits all of the expected standards of behavior, and displays many of the behavioral characteristics of a role model, just not as consistently or completely.
- **2**: Exhibits behavior that is consistent with Standards of Behavior. Does what is necessary. May need coaching to improve on one or more areas of expected behavior.
- **1**: Consistently exhibits behavior that fails to meet one or more of the Standards of Behavior.

**Rating by DANA S. TUMBLESTON:**
- Rating: UNRATED
  - 4.0: Role Model Behavior
  - 3.0: Models standards of behavior most times
  - 2.0: Models standards of behavior inconsistently
  - 1.0: Does not model standards of behavior.

**Rating by VELONDA YVETTE DANTZLER:**
- Rating: UNRATED

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**Section Comments:**

**Supervisor Comments:**
- Employee Comments: No comments

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**Managers**

**Employee**
Rating your Pillar Goals

**Pillar: Service**

**Goal:**
TEST (SF)

**Measurement:**
TEST (SF)

**Status:**
Pending Results

**Achievement Targets:**

<table>
<thead>
<tr>
<th>Target Results</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>1</td>
</tr>
<tr>
<td>40</td>
<td>2</td>
</tr>
<tr>
<td>60</td>
<td>3</td>
</tr>
<tr>
<td>80</td>
<td>4</td>
</tr>
</tbody>
</table>

Pillar Goals added under the Goal Plan tab will automatically populate in this section.

Click the pad and pencil 1
1. Status: Goal Accomplishment
2. Keep the rating Scale MUHA
3. Place rating inside the “Actual Achievement field”
4. Save Changes
**Pillar: Service**

**Goal:**
Customer Satisfaction score of 84% or better on responses in a timely and effective manner.

**Measurement:**
Minimum achievement of 84% for goal accomplishment.

**Status:**
Goal Accomplishment

**Achievement Targets:**

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</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>61</td>
<td>2</td>
</tr>
<tr>
<td>84</td>
<td>3</td>
</tr>
<tr>
<td>93</td>
<td>4</td>
</tr>
</tbody>
</table>

**Rating by DANA S. TUMBLESTON:**

**Rating:** [ ]

**Supervisor Comments:**
[spell check] [legal scan]

**Rating by VELOINDA YVETTE DANTZLER:**

**Rating:** [ ]

**Employee Comments:**
No comments

**Pillar: Quality**

**Goal:**
Customer Service Satisfaction score of 84% or better on deliver quality products and services.

**Measurement:**
Minimum achievement of 84% for goal accomplishment.

**Status:**
Pending Results

**Achievement Targets:**

<table>
<thead>
<tr>
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<tr>
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Overall Rating Performance Rating

Definitions/Success Criteria:
- Role model: Consistently displays exemplary behavior for others to follow or emulate and exceeds expected behavioral norms. Typically exceeds expected behavioral norms. Anticipates the needs of customers and provides service that meets or exceeds expectations. When faced with challenges or problems, identifies the issues and develops solutions without waiting to be directed to do so. Works collaboratively with co-workers and customers to implement solutions to challenges or other problems. An individual that routinely receives positive acknowledgement from customers.
- Exhibits all of the expected standards of behavior, and displays many of the behavioral characteristics of a role model, just not as consistently or completely.
- Exhibits behavior that is consistent with Standards of Behavior. Does what is necessary. May need coaching to improve on one or more areas of expected behavior.
- Consistently exhibits behavior that fails to meet one or more of the Standards of Behavior.

Rating by DANA S. TUMBLESTON:
- Rating: UNRATED
  - 4.0 - Role Model Behavior
  - 3.0 - Models standards of behavior most times
  - 2.0 - Models standards of behavior inconsistently
  - 1.0 - Does not model standards of behavior.

Rating by VELONDA YYETTE HANTZLER:
- Rating: UNRATED

Performance Rating Summary

In the space below please provide summary observations and comments regarding the employee's overall performance rating, including accomplishments, overall strengths and areas for development.

Employee must not have scored a "1" on any job responsibilities, a "1" on behavioral standards or a score of "1" on the attainment of three or more pillar goals to be eligible for any authorized performance-based pay in that year.

Overall Performance Rating: 3.5 / 4.0

Click save (floppy icon) to update overall performance rating score.
Error Message – Incomplete Form
When ready the manager schedules a **Performance Review Meeting** with the employee.

At the conclusion of the meeting the leader sends the form to the signature step by clicking “Send to Next Step.” The form can be printed out for this process.
Signature: Employee Signs, then Manager Signs (in that order).
Employee Signs, then Manager Signs (in that order).
Review Complete:

Copy of completed form filed in the completed folder of both employee and manager
In review:

- System Administrator notifies Manager via email message of required action within SuccessFactors
- Manager logs into system
- Selects Evaluation document
- Review document and forwards document to employee for:
  - SELF-REVIEW
- Employee sends document with their ratings and comments to manager (record purposes only)
- Manager rates employee (Pillar Goals, Duties, Standards of Behavior)
- If applies to your division: Ratings must be discussed with next level of mgmt (Reviewer) prior to issuing to employee!!!!!
Performance Review Meeting: Manager and Employee should review and discuss! (Form can be printed prior to signing).

- Employee signs review on-line and sends back to Manager
- Manager signs and maintains review in the system.
You may find the entire presentation on the University Human Resources Webpage under SuccessFactors/training.
THANK YOU