SuccessFactors On-Line Performance Evaluation System
Agenda

- Introductions
- Objectives
- Overview of *new* Performance Management System
- Performance Review Form
- Supervisor Tree
- Demonstration
- Hands-on Training
- Q&A
Introductions:

Please introduce yourself!
Objectives

The participant will be able to:

- Explain the new performance management process (what, who, why, how, when)
- Explain responsibilities of the supervisor and employee
- Describe the key components of new performance review form
- Describe annual performance management workflow
- Enter and then cascade position description, job responsibilities and pillar goals to direct reports
- Describe how to access and send Planning Stage Acknowledgement forms to direct reports for signature
A new online performance management system that automates the performance evaluation and goal management process and gets people more connected. It supports our organization’s shift to a common review date.

What is SuccessFactors?
What is it?

- A system for managers to record evaluation information that will “populate” the Planning Stage document and the Evaluation document
- A system that calculates evaluation scores!!!
Who will be using it?

- University employees
- MUHA employees
- UMA employees (at a later time)
Why are we doing this?

- **We heard you!** In response to the feedback received from you in the employee satisfaction surveys, we have revamped the Performance Management Process and are implementing a new online performance management system, SuccessFactors.

- SuccessFactors will:
  - Increase fairness and consistency of reviews – everyone will be reviewed at the same time, using the same format, in one system.
  - Create a strong connection between MUSC goals – leader goals – and employee goals, so that we are all working to achieve the same outcomes.
  - Give MUSC the ability to clearly differentiate between low and high performers, so that high-performing employees can be rewarded.
  - Reinforce the importance of our Standards of Behavior – all employees will be evaluated on the same standards.
Why now?

- Supports shifting to the new universal review period
- Supports leadership accountability towards goals and in delivery of performance evaluations
- Reduces subjectivity of performance reviews, makes them more objective
When are we doing this?

- Planning stages for all employees will be completed in SuccessFactors by **November 1**.
- Performance reviews will be completed in SuccessFactors
What are my responsibilities?

Managers/Supervisors/Designated Administrators

- Load PD’s for all direct reports into SuccessFactors
- Enter Pillar Goals in SuccessFactors (for leaders only)
- Cascade Pillar Goals to direct reports in SuccessFactors
- Complete all Planning Stage Acknowledgement Forms in SuccessFactors by **November 1**
What are my responsibilities?

Staff (no direct reports)

- Review and electronically sign Planning Stage Acknowledgement Form in SuccessFactors
- Attend drop-in session for staff if you need help learning about the system; this session is optional.
- Invite HR Training and Development to your staff meetings
Updates to Evaluations

- **Leader Eval:**
  - Pillar Goals: 50%
  - Job Duties: 35%
  - Standards of Behavior: 15%

- **Employee Eval:**
  - Pillar Goals: 30%
  - Job Duties: 55%
  - Standards of Behavior: 15%

Standards of Behavior statement updated.
<table>
<thead>
<tr>
<th>Current process – New process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manual paper process</strong></td>
</tr>
<tr>
<td>Scores manually calculated</td>
</tr>
<tr>
<td>Performance forms manually routed for signatures</td>
</tr>
<tr>
<td>Multiple printed copies of forms</td>
</tr>
<tr>
<td>Data entry required by HR</td>
</tr>
<tr>
<td>Review dates throughout year</td>
</tr>
</tbody>
</table>
**Workflow**

**Annual Performance Review**

**Planning Stage**
August – November

- FY 2010 Planning Stage forms created for all employees
- Supervisor creates position description, job responsibilities and pillar goals for employees
- Supervisor verifies and sends planning form to employee for signature
- Employee electronically signs planning form
- Planning form goes in permanent Completed folder

**Evaluation Stage**
May- August

- Employee completes Self-Review and sends to supervisor
- Supervisor completes employee review
- Supervisor and Employee participate in performance review meeting

**Signature Stage**
July – August

- Supervisor signs review form and sends to employee for signature
- Employee electronically signs review form, can make comments on form
- Signed form goes in permanent Completed folder
The Supervisor Tree tracks the supervisor/subordinate relationships of employees in the University. Data from the tree will be used to populate the management reporting structure.
- Proxy Rights within SuccessFactors vs. Arbor
- “In-Valid” Manager
  - Make sure the “tree” is mapped all the way to the top
Navigating The System
Log into SuccessFactors from MyRecords or the SuccessFactors site from the HR home page. Login with NetID and password.
Access the online performance management system using your web browser.

You will receive automated notification (emails) when you need to participate in the process.
Home Page

The **Home Tab** is where you access all the activities and processes in the system, and where you get a bird’s eye view of the status of performance activities.
Goal Tab
In SuccessFactors a Goal Plan is like an online worksheet that records and tracks goals in one central place throughout the year.
2010 Pillar Goals for Brooke Brown

Please use this page to add or update your Pillar Goals. Pillar Goals added here will automatically populate on your performance review form once created.

It is not necessary to have a department/individual-specific goal for each Pillar Goal, only for those relevant to your job. Likewise, you may have more than one department/individual-specific goal for a Pillar.

<table>
<thead>
<tr>
<th>Service</th>
<th>Visibility</th>
<th>Last Kept</th>
<th>Type</th>
<th>Measurement</th>
<th>Weight</th>
<th>Status</th>
<th>Actual Achievement</th>
<th>Goal Rating</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve employee satisfaction with new hire organizational orientation.</td>
<td>Public</td>
<td>05/28/2009</td>
<td>Personal</td>
<td>Increase 10%</td>
<td>15.0%</td>
<td>Pending Results</td>
<td>0</td>
<td>0</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Target Results

<table>
<thead>
<tr>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
</tbody>
</table>
Create A New Goal

1. Choose what type of goal to add.
   - Personal Goal
   - Library Goal
   - Group Goal

2. Library Goals are selected from an organized library with suggested metrics.

3. Group Goals are instantly applied to an entire group of employees. This could be a specific division or department, or a selection of multiple areas.
Position Description for Brooke Brown

Add Position Description Requirements below; requirement information added here will automatically populate on the performance review form once created.

To view standard position requirements for common MUHA clinical jobs, please visit the MUHA HR web page: MUHA Clinical Jobs
To view commonly used MUSC position requirements and duties, please visit the MUSC HR web page: MUSC Position Templates

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

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Last Modified</th>
<th>Requirements (Education, Work Experience, Licensure, Registry and/or Certifications)</th>
<th>Physical Requirements</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Purpose</td>
<td>05/19/2009</td>
<td>BS</td>
<td>Tall</td>
<td></td>
</tr>
</tbody>
</table>

To deliver great care
Adding New Position Requirements
Job Responsibilities for Brooke Brown

Manager please add Job Responsibilities below. These Responsibilities will automatically populate on the employee's performance review form once created.

To view standard position requirements for common MUHA clinical jobs, please visit the MUHA HR webpage: MUHA Clinical Jobs
To view commonly used MUSC position requirements and duties, please visit the MUSC HR webpage: MUSC Position Templates

<table>
<thead>
<tr>
<th>#</th>
<th>Job Responsibility</th>
<th>Weight</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>1.1 Organizes and prioritizes nursing care activities considering the needs of the patients and other staff members.</strong></td>
<td>10.0%</td>
<td></td>
</tr>
</tbody>
</table>

- a. Organizes and prioritizes care according to patient/family needs; makes appropriate adjustments to update individualized plan of care and seeks assistance when changes in patient status occurs.
- b. Negotiates short/long term goals with the patient to develop and evaluate the individualized plan of care (based on Clinical Pathway, Guideline, Protocol) when applicable.
- c. Identifies all members of the interdisciplinary team and begins to collaborate with all members of the interdisciplinary team to improve care delivered to the patients.
- d. Utilizes the nursing process to facilitate the individualized plan of care using time and resources efficiently, and assumes accountability for plan's effectiveness.
- e. Contributes to the design, implementation and evaluation of a comprehensive culturally sensitive patient/family education plan.
### Job Responsibilities

Adding Job Responsibilities

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Job Responsibility</em></td>
<td>Fields marked with * are required.</td>
</tr>
<tr>
<td><em>Success Criteria</em></td>
<td>Fields marked with * are required.</td>
</tr>
<tr>
<td><em>Weight</em></td>
<td>Fields marked with * are required.</td>
</tr>
</tbody>
</table>

[Add Goal -- Webpage Dialog]

- **Edit your goal below.**
- **Fields marked with * are required.**

- **Job Responsibility:**
- **Success Criteria:**
- **Weight:** 0.0%
Time to Log-In
Your Turn: Experience the Goal Tab

Your Turn!

Activity #1 – Position Description
Your Turn: Experience the Goal Tab

Activity #2 – Job Responsibilities
Questions about the Goal Tab???
Creating, Accessing & Routing Evaluations
**Forms 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.
Workflow: Your Forms & Process
Manager 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.”

Manager Review: Manager receives forms, and provides ratings and comments throughout the evaluation as appropriate. Manager can also send the form to the employee during this step. 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.”

Signature: Employee Signs, then Manager Signs (in that order).

Review Complete: Copy of completed form filed in the completed folder of both employee and manager.
University Form Sections

Review: Printing, Saving, Notes, Audit Trail, Get Feedback, Form Sections, Section Weighting Warnings and Required Ratings

- **Introduction**: Details process expectations and review scoring.
- **Employee Information**: Auto-populates from employee data file.
- **Review Information**: Auto-populates with dates of review cycle and review due date.
- **Position Description**: Auto-populate on form from Position Description Plan under Goal tab
- **Job Responsibilities**: Auto-populate on form from Job Responsibilities Plan under Goal tab
- **Standards of Behavior**: Hard Coded to form
- **Pillar Goals**: Auto-populate on the form from the Pillar Goal Plan under Goal tab
- **Performance Rating Summary**: Score auto calculates based on manager ratings.
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**: 2.43 / 4.0

<table>
<thead>
<tr>
<th>Job Responsibilities</th>
<th>Rating</th>
<th>Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizes and prioritizes nursing care activities considering the needs of the patients and other staff members.</td>
<td>2.75 / 4.0</td>
<td>35.0%</td>
</tr>
<tr>
<td>Push medis</td>
<td>2.0 - Expected Performance (able to perform independently; performance is fully acceptable)</td>
<td>10.0%</td>
</tr>
<tr>
<td>Test Job Responsibility to Cascade</td>
<td>3.0 - Role Model Performance (Proficient; skilled; effective and efficient)</td>
<td>25.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pillar Goals</th>
<th>Rating</th>
<th>Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve employee satisfaction with new hire organizational orientation.</td>
<td>2.04 / 4.0</td>
<td>50.0%</td>
</tr>
<tr>
<td>Increase Patient Satisfaction</td>
<td>4</td>
<td>15.0%</td>
</tr>
<tr>
<td>Increase average length of customer relationship - 10% by [date]</td>
<td>0</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Standards of Behavior</th>
<th>Rating</th>
<th>Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Models standards of behavior most times</td>
<td>3.0 / 4.0</td>
<td>15.0%</td>
</tr>
</tbody>
</table>
Training Review
Manager selects direct reports

Manager enters information into system...
  – Position Description
    • (Training/Education, Physical Reqs, etc.)
  – Pillar Goals
  – Job Duties
  – Standards of Behavior are hard-coded into the form
Review Time

- System Administrator notifies Manager of required action within SuccessFactors
- Manager logs into system
- Selects Evaluation document
- 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)
- Ratings must be discussed with next level of mgt (Reviewer) prior to issuing to employee!!!!!
Manager and Employee should review and discuss!

Employee “signs” review on-line and sends back to Manager

Manager signs and maintains review in the system.
Overview of the System

• Employee information comes from the HR/Payroll system (HERMIT) and the Supervisor Tree

• Employee Social Security Number is not transferred to SuccessFactors

• System and security
  All transmissions between SuccessFactors are encrypted with 128 – bit SSL

• Documents never leave the SuccessFactors server
  Emails are sent each time a document is “sent” to another user
  The emails do not have the document as an attachment
  The documents are in the system
Meeting Adjourned!
Thanks and have a great day!
VeLonda Dantzler, Training Coordinator

Patti Kelly, Project Manager for SuccessFactors

Edra Pinckney, Employee Relations Consultant