Supervisors Guide for Creating a University Success Factors Annual & Annual Catch-Up Planning Documents

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Beginning August 1st 2014, the University will no longer be distributing Planning documents for the Annual Review Period or for those employees coming out of a Probationary or Trial review status.

Each supervisor or designated proxy now has the ability and option to create the planning stage document from the Performance tab for their direct reports.

Once the supervisor creates the Planning Stage document, the email notification from the system will continue to be generated.

The Success Factors System will continue to create planning stages for those employees who are beginning a Probationary or Trial Review.

Remember to input your data entry for each employee under the goals tab in the following sections prior to initiating the form:

- 2015 Pillar Goals
- Job Responsibilities
- Position Description
How to create a Planning Stage Document:

• Log into Success Factors
• If you need to act on behalf of a supervisor, be sure to proxy as the supervisor for the employee that you initiating the Planning Stage for
• Select the Performance Tab from the home page to open the next window

Continue to the next page
The Performance Tab will display the My Forms window.

Click on the Create New Form button located on the top left side of the screen.

This will display the window that contains the form name that you will be selecting.

Click on the link to move to the next screen.
The next screen displays the direct reports for the supervisor.

Click on the name of the employee you would like to send the form to.

This will now display the window for you to change the review dates as needed.

Please refer to the next section on **Guidelines for Planning Stage Dates.**
Guidelines for Planning Stage Dates:

Annual Planning Stage Dates:

Review Start Date:
– Always use the default date of 08/01/20XX

Review End Date:
– Always use the default date of 7/31/20xx

Review Due Date:
– Always use the default date of 10/01/2014

Annual Catch-Up Planning Stage Dates:

Review Start Date:
– Change the default date of 08/01/20XX to reflect the end date of the probationary/trial period the employee is completing

Review End Date:
– Always use the default date of 7/31/20xx

Review Due Date:
– Always use the default date of 10/01/2014
• After you have entered in the dates click on the create and open button on the bottom right hand side of the page to open the form.

![Image of create and open button](image.png)

• Once you open the form, the process will follow the route map for assigned to the form.

![Route map image](image.png)

• Also once the form is initiated, the supervisor must complete the Fiscal Accountability Standard prior to sending the form to the employee for signature.

• If you have initiated the form and need to exit the system there is no need to issue another form. The previously issued form will be displayed on the Performance Tab under My Forms.