

Procedure	Annual Performance Evaluation Procedure	Effective Date:	January 2013
Procedure #	5.7		
Functional Area	Training and Org. Development	Revised Date(s)	01/14/2013

Purpose:

The purpose of this procedure is to complete an employee annual performance evaluation using the online SuccessFactors Performance Management System.

Log in Procedure:

1. Log into my.emich.edu and click on the “Employee” tab.
2. Click “Enter Here” to enter into SuccessFactors Performance Management Systems.”

The Performance Evaluation Form is passed between the employee and manager in six (6) stages:

1. Planning
2. Self-Review
3. Manager Review
4. Discussion
5. Signature
6. Completion

No stage may be skipped without contacting the SuccessFactors Performance Evaluation system administrator in the Human Resource Department at 734.487.3431

Stage 1 – Planning (July 1 – May 30)

During the Planning stage, the employee and manager may concurrently work on all sections of the Performance Evaluation Form. Activities include:

- Creation of SMART objectives via the Objectives Tab located along the top of the SuccessFactors Home page.
 - Open the Objective Plan
 - Click “Create New Objective”
 - Fill out the New Objective criteria. Required items are marked with a red asterisk.

- Clear measures of success for each objective is agreed upon
- Individual Competencies are discussed
- Development Plan is created and timeline for completion of Plan is discussed

Stage 2 – Self Review (June)

During the Self-Review stage, the employee provides rating and comments on the electronic form.

- The Supervisor must move the form to Self Review by clicking on the grey button at the top of each employee’s form labeled, “Move Form to Self Review”
- The Employee will receive the form, open it from their SuccessFactors home page, and provide self-ratings and comments on each Objective and Competency.
- The Employee must then send the form to Manager Review.
- The Employee sends the form from Self Review to Manager Review by clicking on the grey button at the top of their form labeled, “Move Form to Manager Review.”

Stage 3 – Manager Review (June)

During the Manager Review stage, the manager provides rating and comments on the electronic form.

- The Supervisor will receive the form, open it from their SuccessFactors home page, and provide ratings of the employee’s performance for each Objective and Competency.
- The Supervisor must then move the form to Discussion.

Stage 4 – Discussion (end of June)

During the Discussion stage, the manager schedules a face-to-face meeting with the employee to discuss ratings, comments, and gaps between the employee and managers’ ratings. The manager and employee will reach an agreement on any necessary changes to the form prior to the signature stage. This is the last opportunity for any changes to be made.

- The Supervisor moves the form to Discussion by clicking on the grey button at the top of each employee’s form labeled, “Move Form to Discussion.”
- The Discussion step is a place holder, and the form stays in the Supervisor’s SuccessFactors home page.
- When the Discussion has taken place the Supervisor must move the form to Employee Signature.

Stage 5 – Signature (end of June)

During the Signature stage, the employee first provides an electronic signature to the form and then forwards the form to the manager for an electronic signature.

- The Manger moves the form to Employee Signature by clicking on the grey button at the top of each employee’s form labeled, “Move Form to Employee Signature.”

- The Employee will receive the form, open it from their SuccessFactors home page, and e-sign the form by clicking on the grey button at the top of the screen labeled, “Employee Sign.”
- After the Employee confirms their e-signature the form will automatically move to Manager Sign.
- The Manager will receive the form, open it from their SuccessFactors home page, and e-sign the form by clicking on the grey button at the top of each employee’s form labeled, “Manager Sign.”
- After confirming their e-signature the form will automatically move to the Completed folder located in both the Employee’s and Manager’s “My Forms” tab located at the top of any screen in SuccessFactors.

Stage 6 – Complete (July)

The completed form is retained in the SuccessFactors Performance Management System folder under Complete. Both the employee and manager have the ability to send the form to others in the organization by clicking on the grey button at the top of a completed form labeled, “Send Copy.”

Human Resources will automatically receive a copy of every completed Form and run reports to track form completion status.