

# Using SuccessFactors during PRD Cycle

Completing the year-end review

**For:** All Staff

|            |              |                       |                 |
|------------|--------------|-----------------------|-----------------|
| PRD Phase: | Goal Setting | Ongoing Conversations | Year End Review |
|------------|--------------|-----------------------|-----------------|

## Task

Complete your year-end PRD review form in SuccessFactors by:

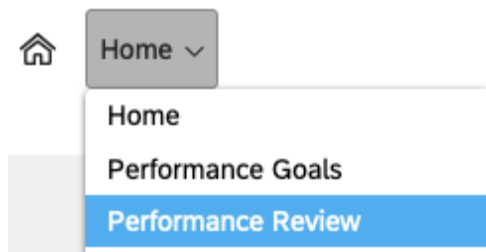
- Rating your Performance Goals and commenting on your progress
- Rate and comment on your Leadership Behaviour
- Rate and reflect on your Development Goals

## Outcome



Your PRD form for your year-end review is completed with ratings and comments, and you have submitted the PRD form to your PRD Advisor/Manager.

## In SuccessFactors

[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard – click the 'Home' drop-down list to select 'Performance Review':

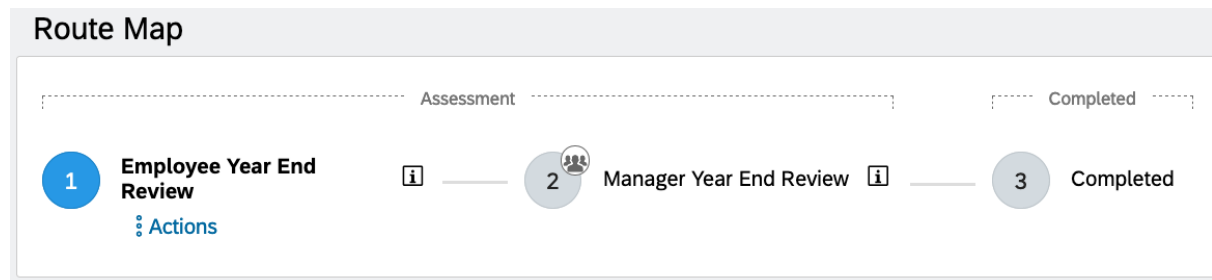


The 'Performance Review' page will display – click on your 'performance plan' form:

| My Forms    |  |  |
|-------------|--|--|
|             | Form Title   | Employee   |
| All Forms   |  2019 Performance Plan - lightweight version for Bravo Bugner | Bravo Bugner  |
| In Progress |  |  |
| Inbox       |  |  |
| En Route    |  |  |
| Completed   |  |  |
| Form Status |  |  |

## Completing the PRD year-end review

There are two stages to completing the year-end review form – the first is shown in the 'Route Map' as 'Employee Year End Review' and is for all staff to complete and outlined in this document:



## Rating and commenting your performance goals

Scroll down to the 'Performance Goals' section.

1: For each Performance Goal choose an 'Employee Rating' from one of five options (definitions are provided by clicking on the question mark icon), then enter a supporting comment:

[Expand All](#) [Collapse All](#)

∨ Conduct security audits every (every 12 months)

---

Goal Detail

1 audits conducted

Employee Rating <sup>?</sup>

Successfully met

Bravo Bugner's Comments

**B** *I* U | | Size  |

2: At the end of the 'Performance Goal' section enter an overall comment reflecting your overall performance:

## Overall comments on Performance Goals

### \* Bravo Bugner's Comments

**B** *I* U | | Size  |

## Rating and commenting on your leadership behaviours

1: Similarly to the Performance Goals section you choose one of five 'Employee Rating' for each Leadership Behaviour:

### 1. Shape the future

By taking a University-wide perspective to understand

#### Manager Rating ?

Select One...

#### Employee Rating ?

Consistently demonstrates

2: After rating each leadership behaviour, enter an overall comment on your Leadership Behaviour:

## Overall comments on Leadership Behaviours

### \* Bravo Bugner's Comments

**B** *I* U | | | Size  |

---

Scroll then to the Development Goals section.

## Commenting on your development goals

You will see Development Goals listed in that section.

There are no ratings for Development Goals:

Current Role

Learn to screen capture

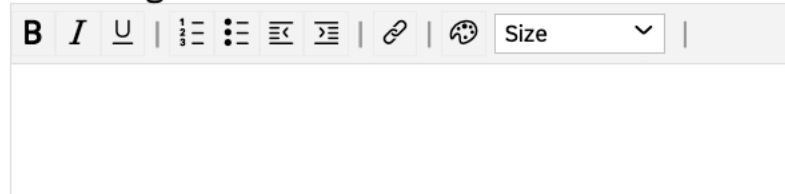
**Achievements**

Goal Details

Enter comments reflecting on your overall development for the PRD cycle:

## Overall comments on Development Goals

### Bravo Bugner's Comments

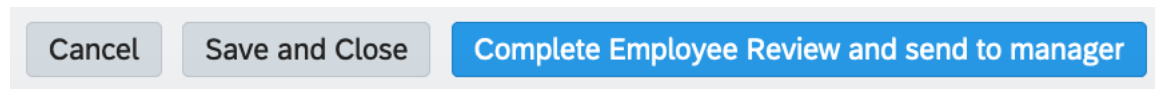


### Finalising the form to send on to your PRD Supervisor/Manager

At the bottom of the form is a series of buttons.

#### I only have a Manager

If you only have a manager to send the year-end review form to then you will only have the option to send to your Manager:



After clicking the button, write a short email notification in the box provided, then click the 'Complete Employee Review...' button to confirm.

#### I also have a PRD Mentor

You will have a choice of who you wish to send the form to after clicking the following button:



You will then have an option of which person to send to – by default your PRD Advisor is selected:

### Complete Employee Review and send to [username]

You are about to send this form to the next person(s) specified in the workflow.

Juli Bienvenu  Zeke Feldklein

#### Email Notification Comments

---

Add an email notification comment to your PRD Supervisor then click the 'Complete Employee Review and send to...' button to confirm:



## Next Steps

Your PRD Advisor/Manager will receive an email notification that you have completed the 'Employee Year End Review' performance form and it is available in their 'Performance Review' inbox.

---

*You and your PRD Advisor/Manager will either meet before or after submission of your year-end performance review form.*

---

## Receiving the Year End Review form back

If your PRD Advisor/Manager sends the form back to you to revise/amend entries simply follow the above process for completing and send the form back.

---

*Your PRD is completed when your Manager completes the form in their step.*

---