

# Using SuccessFactors during PRD Cycle

Completing the year-end review for your staff

**For:** Managers/PRD Advisors

PRD Phase:	Goal Setting	Ongoing Conversations	Year End Review
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## Task

Complete the year-end PRD review form in SuccessFactors for your staff:

**By either PRD Advisors/Managers:**

- Rating their Performance Goals and commenting on their progress
- Rate and comment on their Leadership Behaviours
- Reflect on their Development Goals

**Managers only:**

- Confirm your conversation with them regarding your ratings and comments

## Outcome

The PRD form for your staff's year-end review is completed with ratings and comments, and you have submitted the PRD form as completed.

## A note for PRD Advisors

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*PRD Advisors can enter comments and ratings but ultimately the manager is required to finalise and complete the PRD year-end review form.*

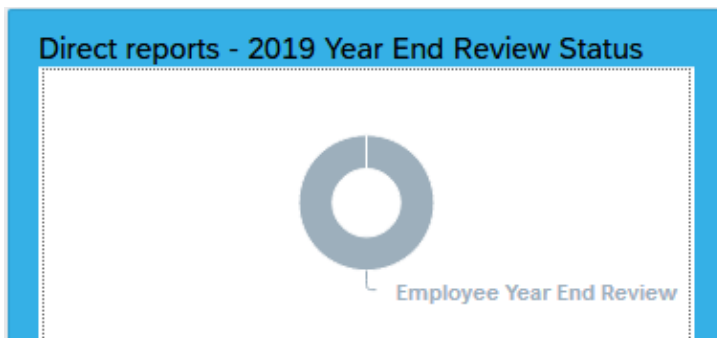
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## In SuccessFactors

[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard.

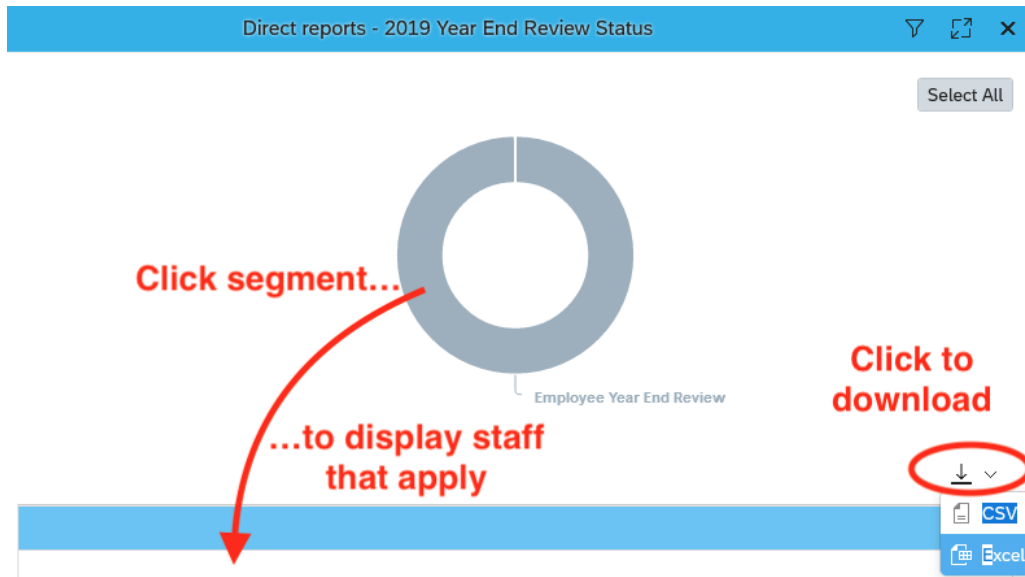
### Viewing your Direct/PRD reports PRD form status

On the home dashboard during the year-end review period will be a tile that visualises the status of the PRD review form for your direct reports or PRD reports progress:



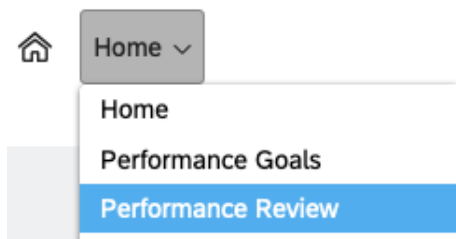
Hover over the donut graph in the panel to get a count of staff this status applies to. The graph will update as the PRD year-end review progresses from the 'Employee Year End Review' stage, to 'Manager Year End Review' and then 'Completed' stages.

Clicking on the graph will open a new window: clicking again on the status segments will show the list of staff associated with that stage. This list can be downloaded as an Excel file.



### Opening the PRD year-end review

On the home dashboard click the 'Home' drop-down list to select 'Performance Review':



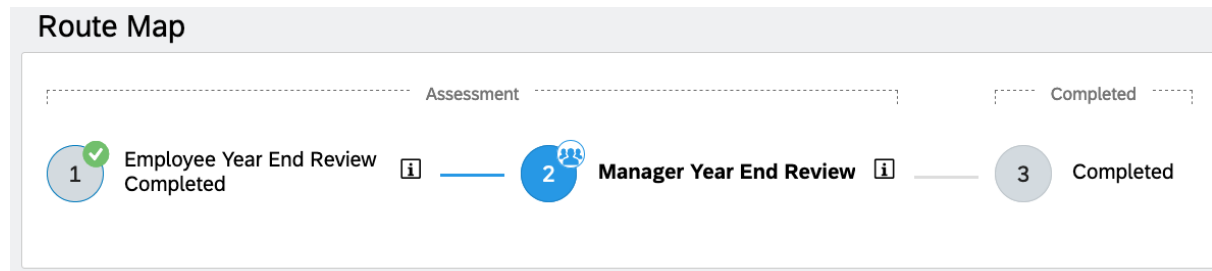
The 'Performance Review' page will display – click on the 'performance plan' for the staff member you want to review:

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

## Completing the PRD year-end review

There are two stages to completing the year-end review form – the second is shown in the 'Route Map' as 'Manager Year End Review' and is for Managers to complete as outlined in this document.

*PRD Advisors can enter comments and ratings but ultimately the manager is required to finalise and complete the PRD year-end review form.*



## Rating and commenting on staff performance goals

Scroll down to the 'Performance Goals' section.

1: For each Performance Goal choose an 'Official Rating' from one of five options, then enter a comment. Use the question mark symbol for rating definitions:

Expand All Collapse All	Official Rating ?	Action
Conduct security audits every (every 12 months)	●○○○○ Select One...	
<b>Goal Detail</b> 1 audits conducted		<b>Completed</b>
<b>Juli Bienvenu's Comments</b> 	<b>Ratings from Others</b>  <b>Employee Rating by Bravo Bugner ?</b> ●●●○ 3.0 - Successfully met <b>Bravo Bugner's Comments</b> The security audit was carried out as per specifications.	

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

**Overall comments on Performance Goals**

\* Juli Bienvenu's Comments

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

**Bravo Bugner's Comments**  
 The security audit was carried out as per the agreed timeframe and processes.

[Rating and commenting on staff leadership behaviours](#)

1: Similarly to Performance Goals section you chose one of five 'Official Rating' for each Leadership Behaviour. Use the question mark symbol for rating definitions:

**1. Shape the future**

By taking a University-wide perspective to understand the broader and longer term factors that may impact UON.

\* Manager Rating ?

○ ○ ○ ○ ○ Select One...

**Ratings from Others**

**Employee Rating by Bravo Bugner ?**

3.0 - Consistently demonstrates

2: After rating your staff's leadership you next enter an overall comment on their Leadership Behaviour:

**Overall comments on Leadership Behaviours**

\* Juli Bienvenu's Comments

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

**Bravo Bugner's Comments**  
 In carrying out my performance goals this year I have undertaken to consistently demonstrate leadership capabilities for my level.

Scroll then to the Development Goals section.

[Commenting on staff 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

Leave a comment reflecting on your staff's overall development for the PRD cycle:

Overall comments on Development Goals

Juli Bienvenu's Comments

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

Bravo Bugner's Comments

Screen capturing is a useful skill that has enhanced staff guides and general communication i have produced.

## Finalising the form to complete the PRD

### For PRD Advisors

There will be a button indicating to send the form on to the manager – in this example the PRD Advisors will send the form on to the manager, Cirillo Canton, to review and finalise:

### For managers

Only you can finalise the PRD year-end review, however:

#### If your staff member also has a PRD Advisor

You have the option of sending the PRD year-end review form back to the PRD Advisor (eg: Kip Greggersen) or the employee to add further information, otherwise you can finalise the PRD form.

#### If your staff member does not have a PRD Advisor

You can send the PRD year-end review form back to the employee if you required further information to be included otherwise you can finalise the PRD form.

#### If you have sent the form back to a PRD Advisor or the staff member

The year-end review form will appear back in the appropriate person's 'inbox' in SuccessFactors.

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*Please notify the recipient that the form is back in their inbox.*

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## Sign-off and finalising the PRD year-end review form

Scrolling to the bottom of the form to reveal the sign-off agreement which must be checked.

### Final Sign Off by Manager

  \* I have had a conversation with my employee and they understand the final overall rating.

You then click the 'Finalise PRD' form button

## Next Steps

Your staff member's PRD year-end review form is complete and available in their 'completed' folder in SuccessFactors.