PE forms are not available year-round. PE forms are generated and released one to two months before the PE due date. For UK Campus employees, the release date is in December.

Access the UK Online PE System via myUK

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From myUK, click on the Employee Self Service Tab</td>
</tr>
<tr>
<td>2</td>
<td>Click on the Performance Management link</td>
</tr>
<tr>
<td>3</td>
<td>Click on the Performance Goals and Evaluations link</td>
</tr>
</tbody>
</table>

This link takes you to the UK Online PE System.
## Adding SuccessFactors to Internet Browser Trusted Sites

If you are not taken to the Home Page of the UK Online PE System or are using Internet Explorer, you will need to add the SuccessFactors website to your trusted sites.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From an open browser session, click on <strong>Tools</strong>, then <strong>Internet Options</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>In the Internet Options popup, click on the <strong>Security</strong> tab, then select <strong>Trusted Sites</strong>, then click on the <strong>Sites</strong> button.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the SuccessFactors URL in the <strong>Add this website to the zone: field</strong>, then click the <strong>Add</strong> button, the <strong>Close</strong> button, and finally the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**SuccessFactors URL**

https://performancemanager4.successfactors.com
Basic Navigation – Accessing Employee Performance Evaluation Forms

You have two options from your Home screen when accessing your employees’ PE forms.

<table>
<thead>
<tr>
<th>Option One:</th>
<th>My Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Locate the My Team tile</td>
<td>Calamity Forrest</td>
</tr>
<tr>
<td>• Click on the employee record you</td>
<td>Calloway Dixon</td>
</tr>
<tr>
<td>wish to view</td>
<td>Calmon Ebert</td>
</tr>
<tr>
<td></td>
<td>Calfred Gardner</td>
</tr>
</tbody>
</table>
### Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

- Click on the **Actions** link

### Favorites

- Click on the **Performance Evaluation** link

#### Go To
- Profile
- Scorecard
- 2013 University Performance Evaluation
- Goal Plan

- You are taken directly to the employee’s PE form, if it has been released

---

**Calloway Dixon**

Local Time: 11:59:39 AM

- **Calloway is on track**

---

**Calloway Dixon**

Local Time: 12:10:02 PM

- **Calloway is on track**

---

### 2013 University Performance Evaluation for Calloway Dixon

---

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### Option Two:
- From the **Home Page**, click on the **Navigation Menu** and choose **Performance**
- There are four main sections in the **My Forms** menu

| All Forms: contains all forms, currently active or completed |
| Completed: contains all completed forms |
| Form Status: view form status |

### My Forms

| In Progress: **Inbox** - contains active forms requiring your attention |
| **En Route** – contains active forms “currently with” another person in the PE process, this is normally the employee |

<table>
<thead>
<tr>
<th>Form Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌟 2013 University Performance Evaluation for Calvin Ebert</td>
</tr>
<tr>
<td>🌟 2013 University Performance Evaluation for Calming Gartner</td>
</tr>
<tr>
<td>🌟 2013 University Performance Evaluation for Calamity Forrest</td>
</tr>
<tr>
<td>🌟 2013 University Performance Evaluation for Calloway Dixon</td>
</tr>
</tbody>
</table>

### From any of the sections, Click on the PE link you would like to view in the **Form Title** column

### You are taken to the employee’s PE form

### To return to the PE form listing, click on the **Reviews** link
Completing the PE Process – Progress Line and Introduction

After accessing the PE form both the employee and supervisor can view the progress line. This gives you a quick update of which step the PE form is currently in.

There is also an introduction that explains the process from beginning to end.

<table>
<thead>
<tr>
<th>Performance Evaluation Introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>The employee may complete a self-evaluation and forward it to his or her manager. The manager will complete the evaluation and make it available for higher-level review. Once higher-level review is complete, the manager and employee will meet to discuss the evaluation. After the meeting, additional comments or rating adjustments can be made. Once this is complete, the employee and manager will sign the form.</td>
</tr>
</tbody>
</table>
Completing the PE Process - Step One: Employee Self Evaluation

The PE form in the UK Online PE System starts with an Employee Self Evaluation. If the employee chooses not to complete a self evaluation, the PE form still needs to be sent to the manager so the PE process can advance. Per University policy, the self evaluation is optional for the employee unless it is made mandatory by you or your department. You will not be able to enter your ratings and comments until the form is sent to you.

Each Major Job Responsibility has its own section where the employee can self-rate and enter comments to support their rating.

Employee fields are open for input. This information will not be visible to the manager until the form is sent to the manager.

Manager fields are not open for input in this step.

To review what the rating levels mean, click on the Rating link. The window to the right will open, in which detailed information will be presented for each rating.

Reminder: Only whole numbers are permitted for MJR rating levels.
Completing the PE Process - Step One: Employee Self Evaluation, continued

Below the MJR sections, you will find the Core Competencies for UK Campus employees. These can be rated on a 1 to 3 level and are not included in the overall PE score.

The Writing Assistant gives you examples of behaviors exemplifying the Core Competencies at each rating level.

The Legal Scan can be used to identify words or phrases that might be inappropriate and unnecessary. It does not prevent the employee from using the words or phrases.

Any professional development goals entered on the Professional Development Goal Plan will be included at the bottom of the PE form. There are no rating fields for these goals as they are not included in the overall PE score.

These records can be removed from the PE form.

The PE form can be saved at any time by clicking on the Save button at the top of the screen.

The PE form can also be saved and closed to allow for multiple work sessions. To do this, click on the Save and Close button at the bottom of the screen.

The employee sends the PE form to their manager by clicking on the Send to Manager button which is at the top and bottom of the PE form. After the Legal Scan, there is a second confirmation step that must be completed before the form is sent to the manager.
Completing the PE Process - Step Two: Manager Review

After the employee sends the PE form to the manager, it is now time for the manager to input their ratings and comments related to the employee’s performance.

Employee fields are now viewable by the manager. These fields are locked and the manager cannot make any changes to what the employee entered.

The manager fields are now open for input. The information entered in these fields will not be visible to the employee until the form is sent to the employee for signature.

The Core Competencies need to be rated and part of the PE conversation even though they are not included in the overall PE rating, with the exception of UK HealthCare Leadership.
Completing the PE Process - Step Two: Manager Review, continued

The Methods of Evaluation section allows you to document how you gathered information used for the employee’s rating and performance feedback. You can select all methods that apply.

<table>
<thead>
<tr>
<th>Methods of Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select from the following Methods of Evaluation that will be used in evaluating the employee’s performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.</td>
</tr>
</tbody>
</table>

- Supervisory Observation - Supervisor evaluates the employee’s performance by direct observation of work.
- Third Party Feedback - Supervisor evaluates the employee’s performance by input based on relevant feedback from outside customers, vendors, or others.
- Peer Feedback - Supervisor evaluates the employee’s performance in part based on relevant feedback from the employee’s peers.
- Spot Checks - Supervisor evaluates the employee’s performance in part based on random spot checks of work.
- Sampling Statistics - Supervisor evaluates the employee’s performance in part based on samples of the employee’s work or statistical data that indicates the employee’s level of work or demonstrated competence.
- Project Results - Supervisor evaluates the employee’s performance in part based on actual results of projects or assignments the employee has managed or participated in.
- Self Report - Supervisor evaluates the employee’s performance in part based on the employee’s own evaluation of his/her work.

Other

The manager can also add comments to any professional development goals that appear on the employee’s PE form.

Professional Development/Other Goals

<table>
<thead>
<tr>
<th>Professional Development:</th>
</tr>
</thead>
<tbody>
<tr>
<td>work harder!</td>
</tr>
</tbody>
</table>

Status: Complete
Start: 01/01/2013
Due: 12/31/2013
Complete: 0.0%

Comments by Mobeline Manager:

The overall PE rating won’t be calculated until the PE form is saved. Click on the Save button at the top of the screen to calculate the PE rating and reveal the individual MJR ratings.

Summary

Ratings for each MJR and Core Competency are listed here. The overall rating is calculated from the MJR scores. The Core Competency ratings are not calculated into the overall rating. Professional Development goal results are also included but not rated. Overall comments on the employee’s performance can be entered in this section.

Calculated Form Overall Rating: 2.4 / 4.0
Rating: 2.4 / 4.0
2.0 - Meets Expectations
Completing the PE Process - Step Two: Manager Review – continued

The manager can enter overall comments or summary at the bottom of the PE form.

Click the **Send to 1:1 Meeting** button to advance the PE form to the next step. This button is also located at the top of the PE form.

Completing the PE Process - Step Three: 1:1 Meeting

The PE form is parked at the 1:1 Meeting step until the face-to-face meeting between the manager and employee has occurred. While the form is in this step:

- Upper-level management can review PE forms for employees in their direct reporting line
- Employees cannot view any ratings or comments entered by their manager
- The manager can use the Online PE System to display the PE form, or print a hard copy for use during the face-to-face meeting
- Managers can make edits to their fields on the PE form based on information gained during the face-to-face meeting with the employee

After the face-to-face meeting has occurred and any edits made, the manager will send the PE form to the employee for signature using the **Send to Employee for Signature** button. This button can be found at the top and bottom of the PE form.
UK Online PE System – Managing the PE Process for Campus Supervisors

Completing the PE Process - Step Four: Employee Signature

In this step, the employee can view the completed PE form, seeing the manager’s ratings and comments, methods of evaluation, and the overall PE rating. These fields are now locked and no changes can be made.

1.1

Goal: UK
Major Job Responsibility:
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)

Essential Function: create action plan

Job Standard: SOX compliance rate

Weight: 20.0% Start: 01/01/2013

Due: 12/31/2013 Complete: 100.0% Status: Complete

Rating by Mobeline Manager:
Manager Rating: 2.0 - Meets Expectations
Mobeline Manager's Comments:

Rating by Col Abbott:
Rating: 2.0 - Meets Expectations
Subjects Comments:

Explain rating: Provide examples of employee's performance to support your rating
Can include additional comments to support self-rating.

Methods of Evaluation

Please select from the following Methods of Evaluation that will be used in evaluating the employee's performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.

☐ Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
☐ Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
☐ Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
☐ Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
☐ Sampling Statistics - Supervisor evaluates the employee's performance in part based on samples of the employee's work or statistical data that indicates the employee's level of work of demonstrated competence
☐ Project Results - Supervisor evaluates the employee's performance in part based on actual results of projects or assignments the employee has managed or participated in
☐ Self Report - Supervisor evaluates the employee's performance in part based on the employee's own evaluation of his/her work

Other

Summary

Ratings for each MJR and Core Competency are listed here. The overall rating is calculated from the MJR scores. The Core Competency ratings are not calculated into the overall rating. Professional Development goal results are also included but not rated. Overall comments on the employee’s performance can be entered in this section.

Calculated Form Overall Rating 2.4 / 4.0

<table>
<thead>
<tr>
<th>Major Job Responsibilities</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)</td>
<td>2.0 - Meets Expectations</td>
</tr>
</tbody>
</table>

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Completing the PE Process - Step Four: Employee Signature – continued

The employee can view the overall comments entered by the manager.

The employee’s signature acknowledges the one-to-one conversation has taken place and the PE form has been reviewed. The signature does not necessarily mean the employee agrees with the content of the PE form.

The employee has the opportunity to add final comments of their own.

Click on the Sign button to electronically sign the PE form and send it to the manager.

Completing the PE Process - Step Five: Manager Signature

The manager can view any final comments added by the employee during the previous step.

The manager can now add their final comments before signing.

Click on the Sign button to electronically sign the PE form to complete the process.
**Viewing Completed PE Forms and Completion Status**

To view completed PE forms, go to your **Performance** page, click on the **Completed** section, then:

- Click on the link in the **Form Title** column to view completed PE forms.

To get a quick visual of your team’s completion data, click on the **Form Status** link:

- **Form Status section: Aggregate view**

```
<table>
<thead>
<tr>
<th>Form Title</th>
<th>Employee</th>
<th>Form Start Date</th>
<th>Form End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 University Performance Evaluation</td>
<td>Cal Abbott</td>
<td>01/01/2013</td>
<td>12/31/2013</td>
</tr>
</tbody>
</table>
```

- **Form Status section: Individual view**

```
<table>
<thead>
<tr>
<th>Employee</th>
<th>Manager Review</th>
<th>1:1 Meeting</th>
<th>Employee Signature</th>
<th>Manager Signature</th>
<th>Date</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frank Manager</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Calthea Dean</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Calthea Durr</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Calthea Forest</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
</tbody>
</table>
```

Legend: ☑️ Completed
☑️ Completed Form
⚠️ Requires Your Attention
 ❗️ Terminate