Purpose

Use this procedure to create a Performance Document to record a job well done or to document an area for improvement. Once this form is completed by the Supervisor it is routed to the Employee for them to acknowledge. If the Performance Document is being used to document a "Needs Improvement" then a meeting with the Employee should occur prior to the Performance Document being sent to the Employee. ***The Performance Document is an informal documentation and is not recognized by the Department of Personnel Administration as part of the formal Disciplinary process.***

Trigger

Perform this procedure when you want to create a Performance Document to recognize an Employee for a job well done or to document an area that needs improvement.

Prerequisites

- For Performance Documents where an Employee needs improvement a meeting is required explaining why the Performance Document is being created
- There is an informal need to document an employee's actions

Menu Path

Use the following URL to begin this transaction: http://sapprdep.dot.state.co.us:50000/irj/portal.

- Select **Manager Self-Service** tab ➡ **Performance** link

Transaction Code

Not Applicable

Helpful Hints

None.

Procedure

1. Start the transaction using the URL http://sapprdep.dot.state.co.us:50000/irj/portal. The *SAP NetWeaver Portal* screen displays.
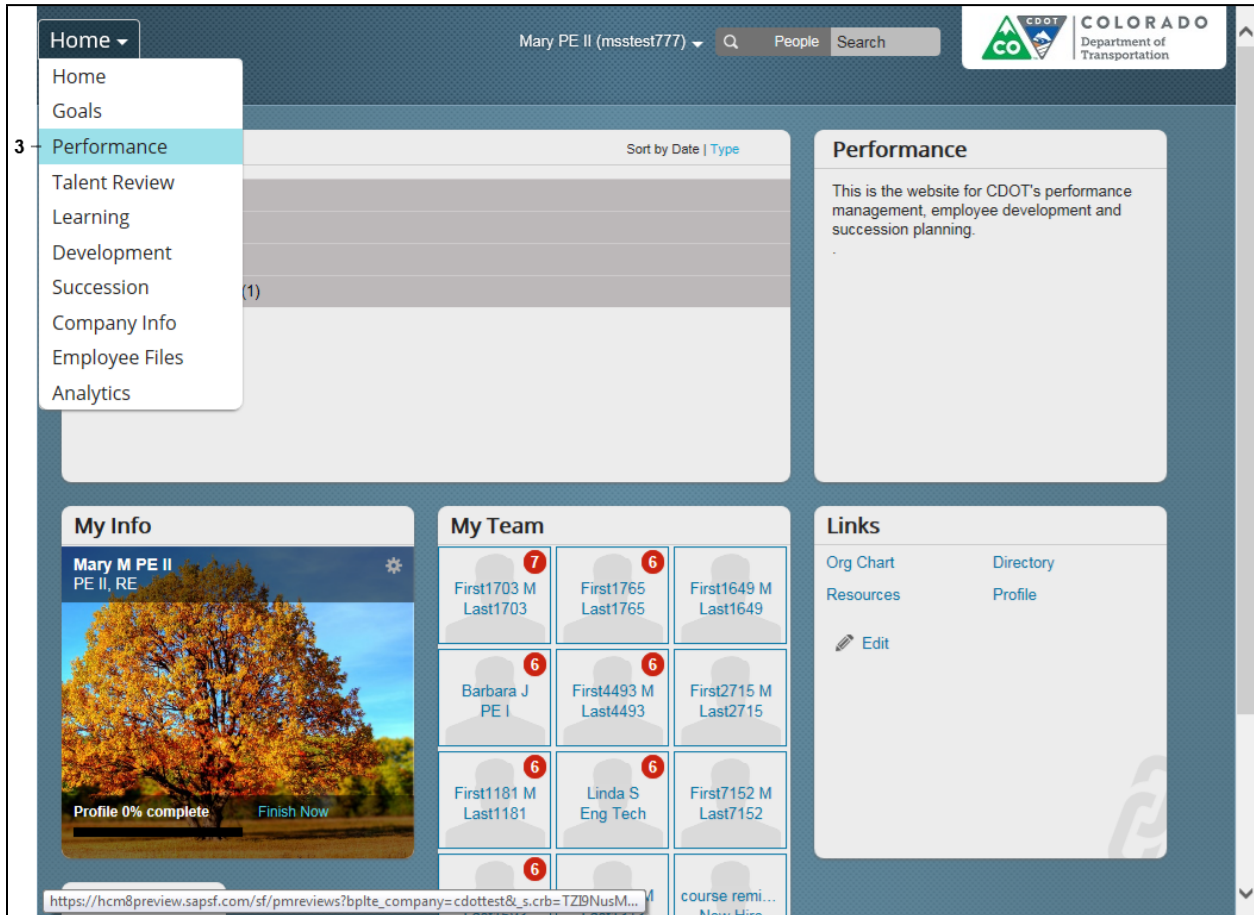
Click the **Employee Self-Service** tab in the *SAP NetWeaver Portal* screen, then select the **Performance** link in the **Performance and Development** section.

SuccessFactors: Home
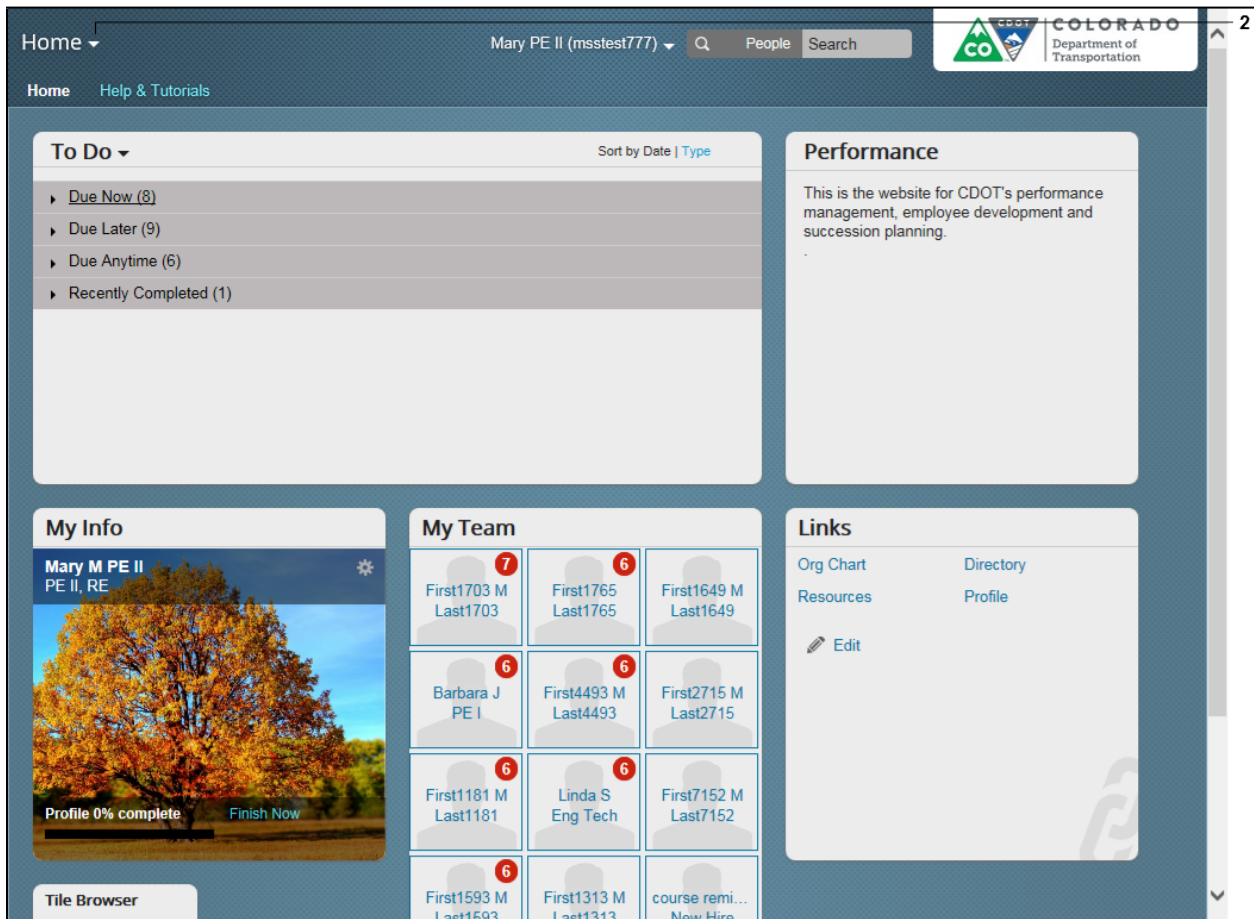
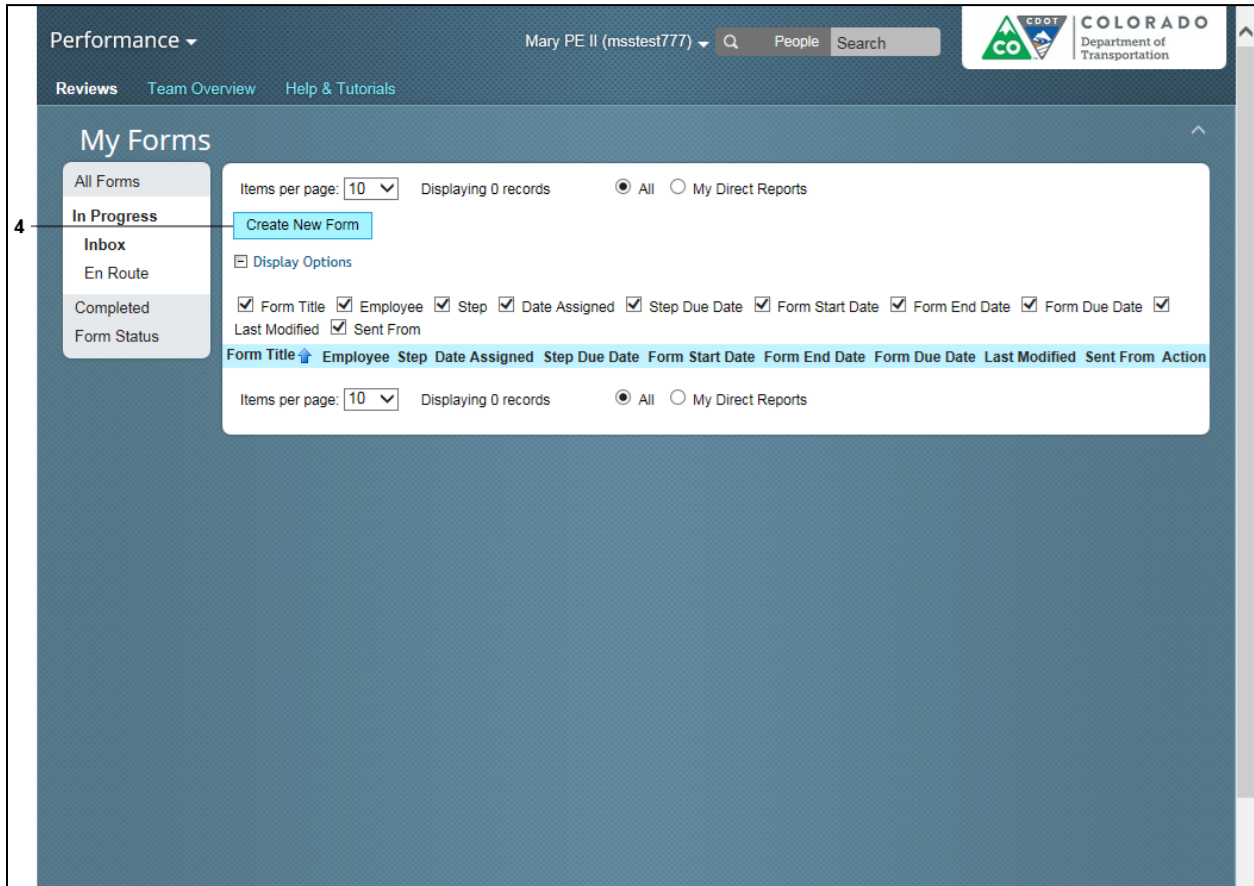**2.** Click **Home** drop-down button [ ].

SuccessFactors: Home

3. Select **Performance** option Performance from the drop-down menu.

If you are not taken to the *Reviews* page, click the link for *Reviews* and proceed to step four.
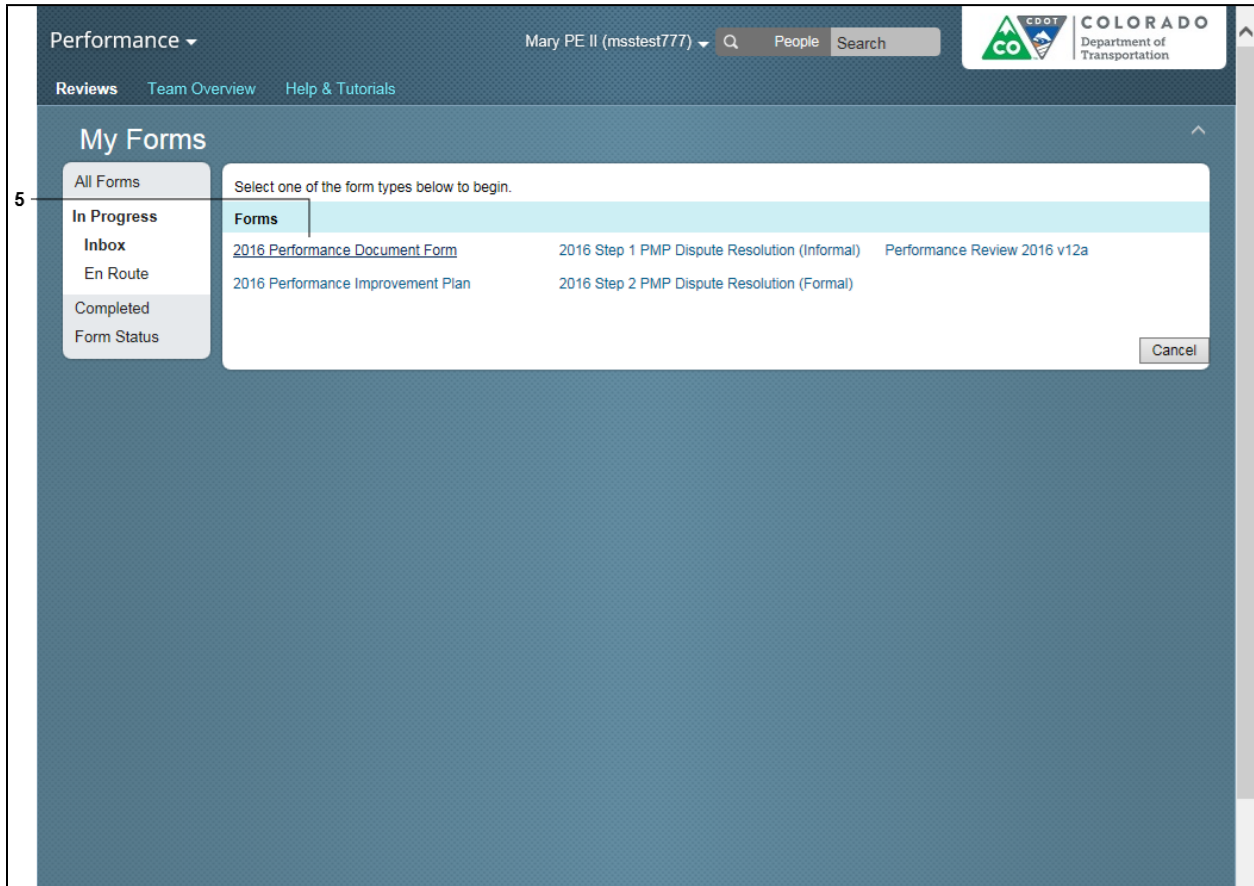
SuccessFactors: My Forms

4.   Click **Create New Form** button   Create New Form   .

SuccessFactors: My Forms
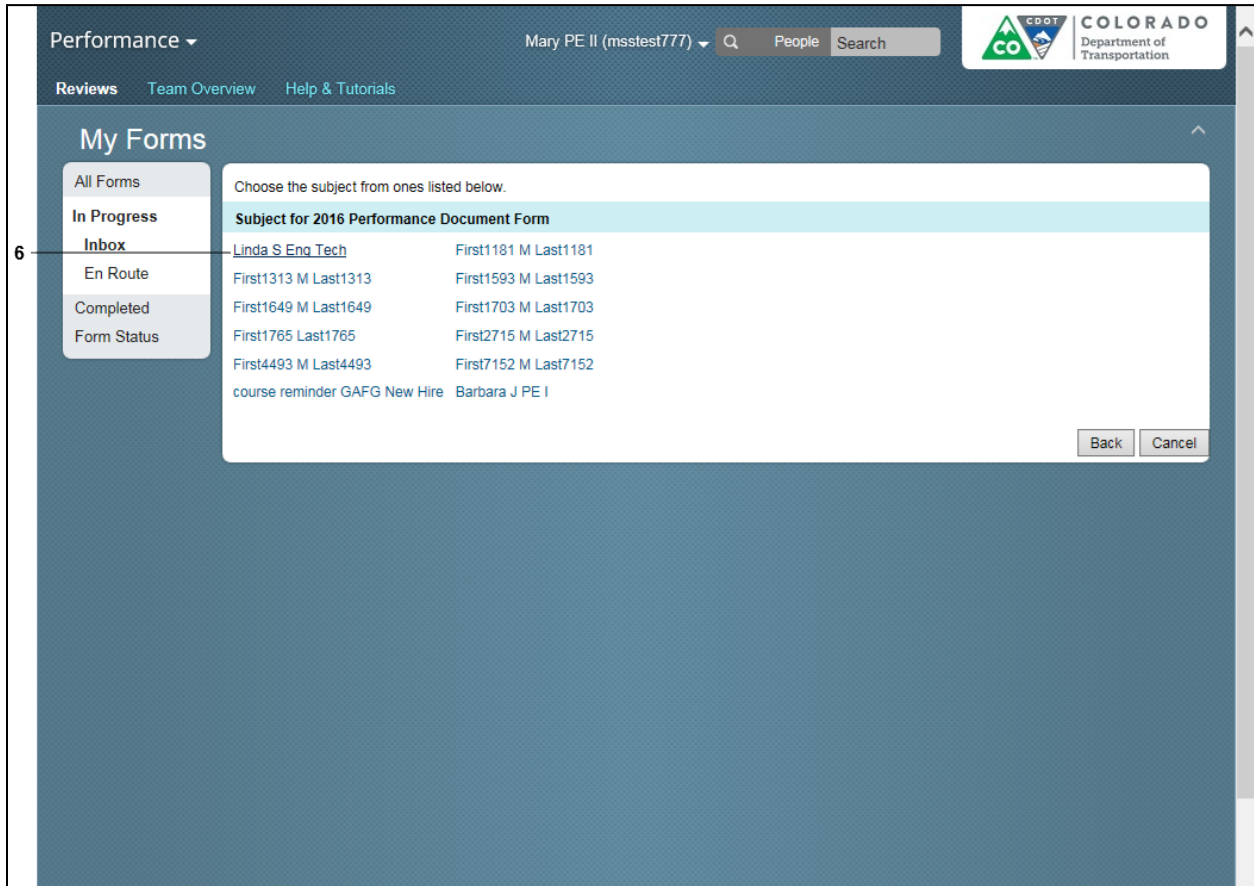
5. Click **2016 Performance Document Form** link 2016 Performance Document Form .

SuccessFactors: My Forms
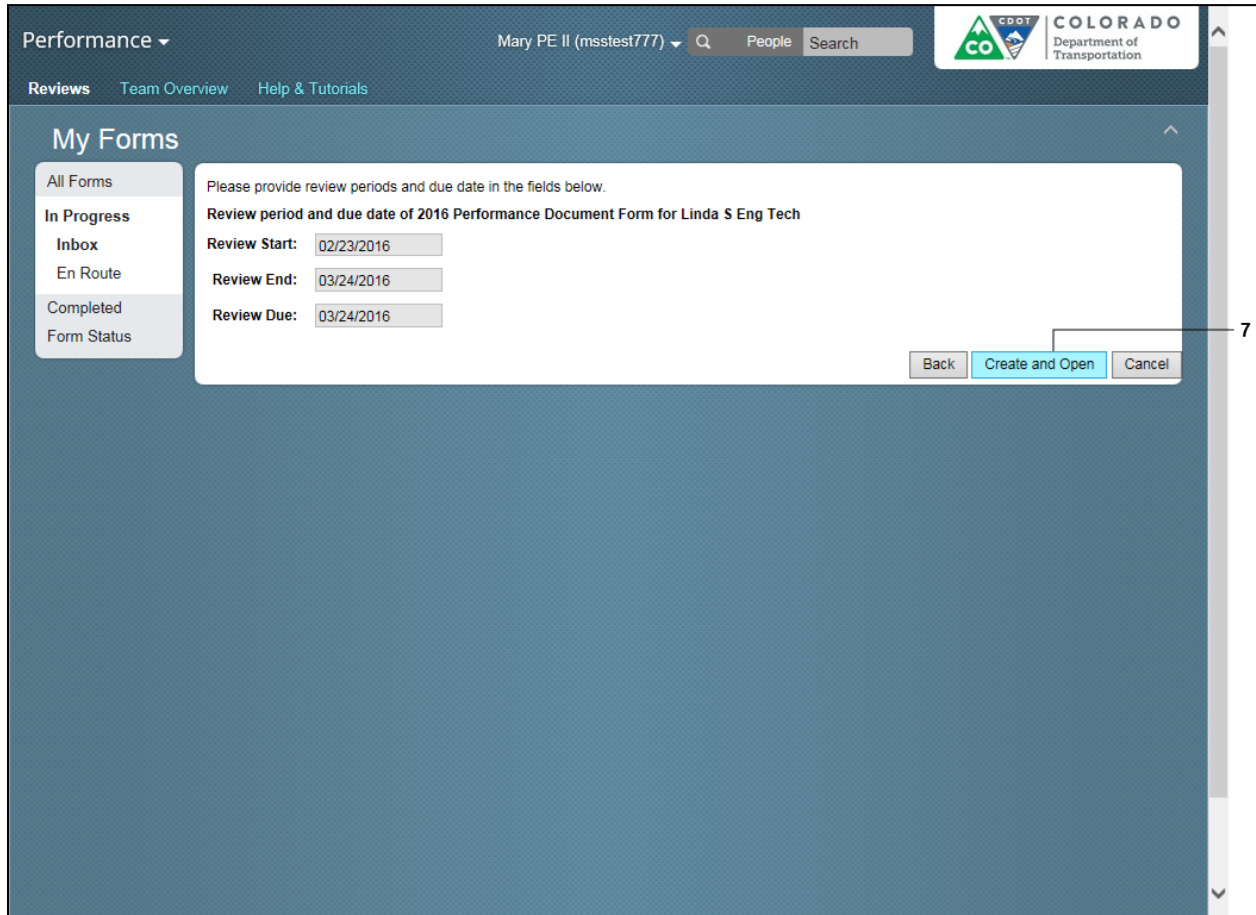
6.   Click the link for the employee's name.

Example: Linda S Eng Tech
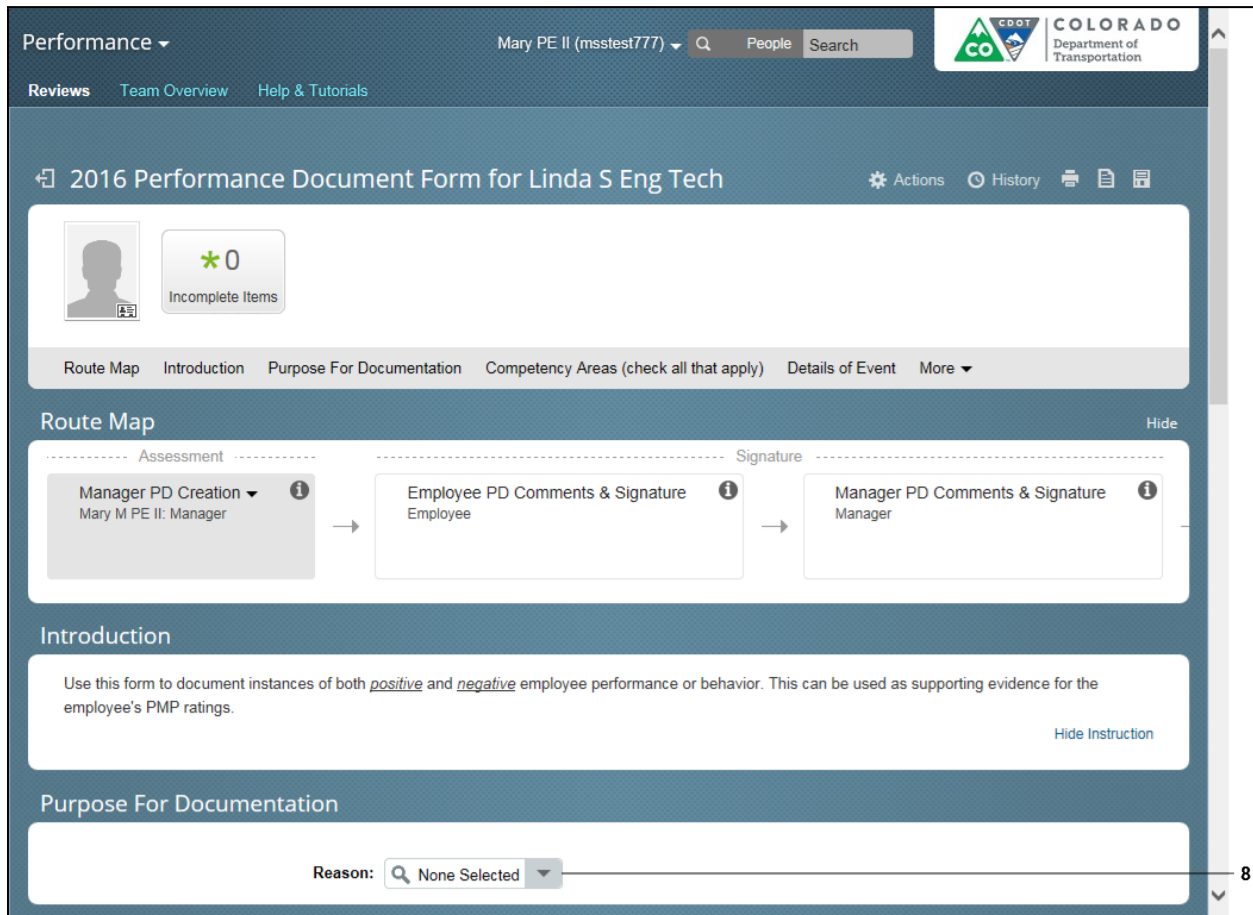
SuccessFactors: My Forms

7. Click **Create and Open** button [Create and Open].

The review periods and the due dates of the form are fixed and must not be changed.

SuccessFactors: Performance Review

8. Click **Reason** drop-down button .

SuccessFactors: Performance Review

9. Select the Performance Document type from the drop-down menu.

Example: Congratulations

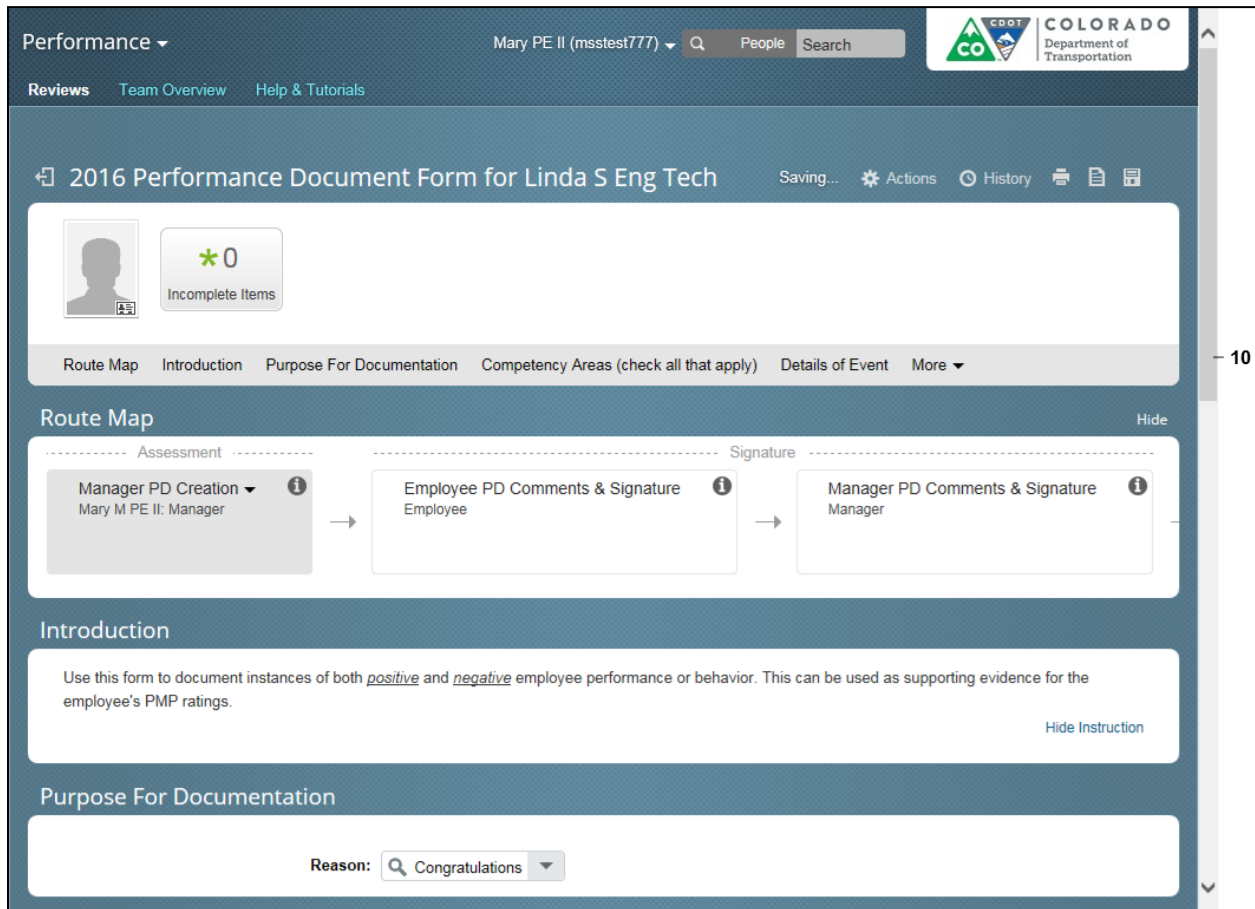Performance Documents may also be created to address areas that an employee needs to improve. If this is the case, select *Needs Improvement* instead of *Congratulations*.

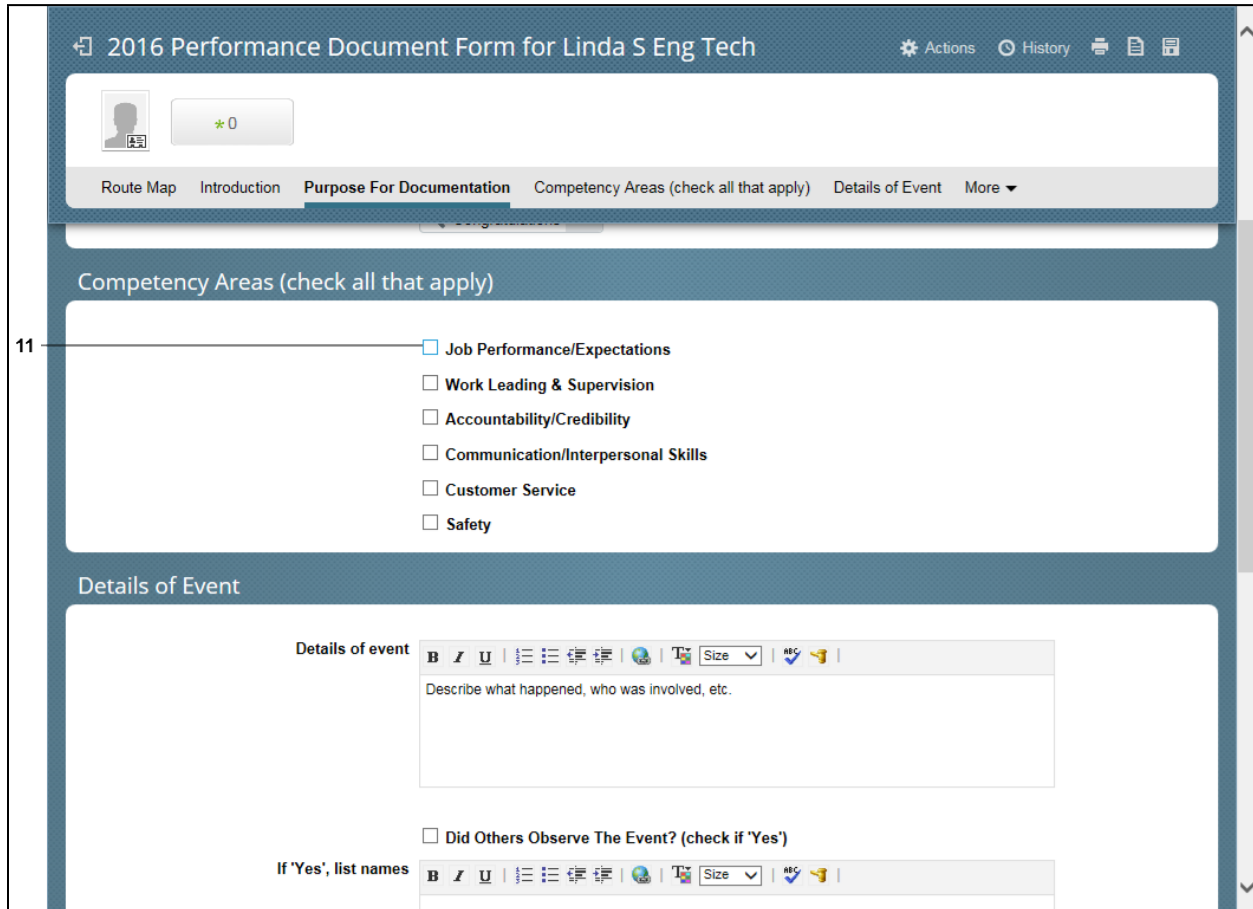**SuccessFactors: Performance Review - Windows Internet Explorer**

10.   Use the vertical scroll bar to view the competency areas.

Starting in 2016, SuccessFactors forms have bookmarks under the Employee picture, Clicking on this link takes to the specific section of the document.

SuccessFactors: Performance Review

11.   Select **Job Performance/Expectations** check box ☐.

Enter one or more of the competency areas that apply to the actions the employee took that resulted in the Performance Document.

SuccessFactors: Performance Review

12. As required, complete/review the following fields:

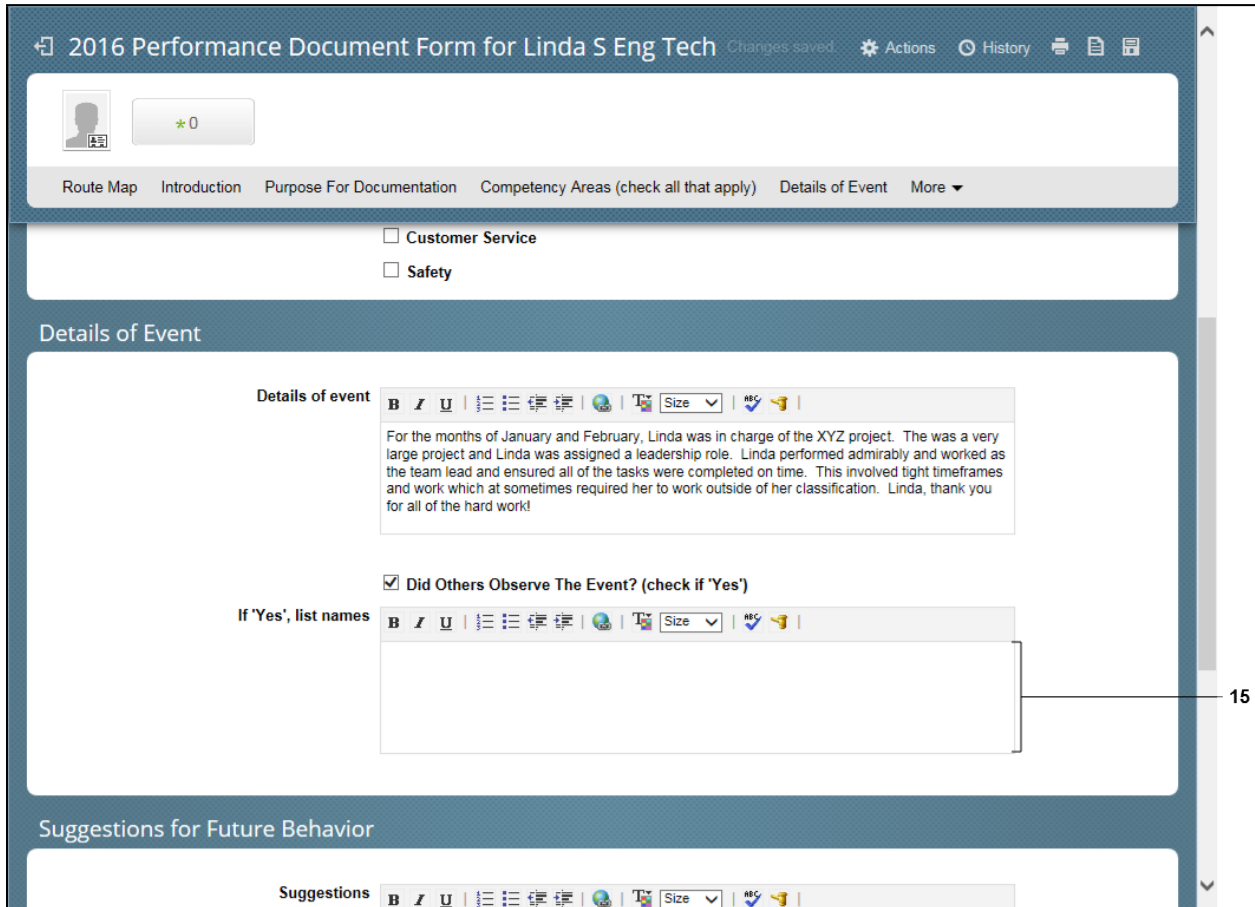| Field	R/O/C	Description
Details of event	Required	Text description of the event. **Example:** For the Months January and February Linda was in charge of the XYZ project. This was a very large project and Linda was assigned a leadership role. Linda performed admirably and worked as the team lead and ensured all tasks were completed on time. This involved tight timeframes and work which at sometimes required here to work outside of her classification. Linda, thank you for all of the work!

SuccessFactors: Performance Review

13. Select **Did Others Observe The Event? (check if 'Yes')** check box ☐.
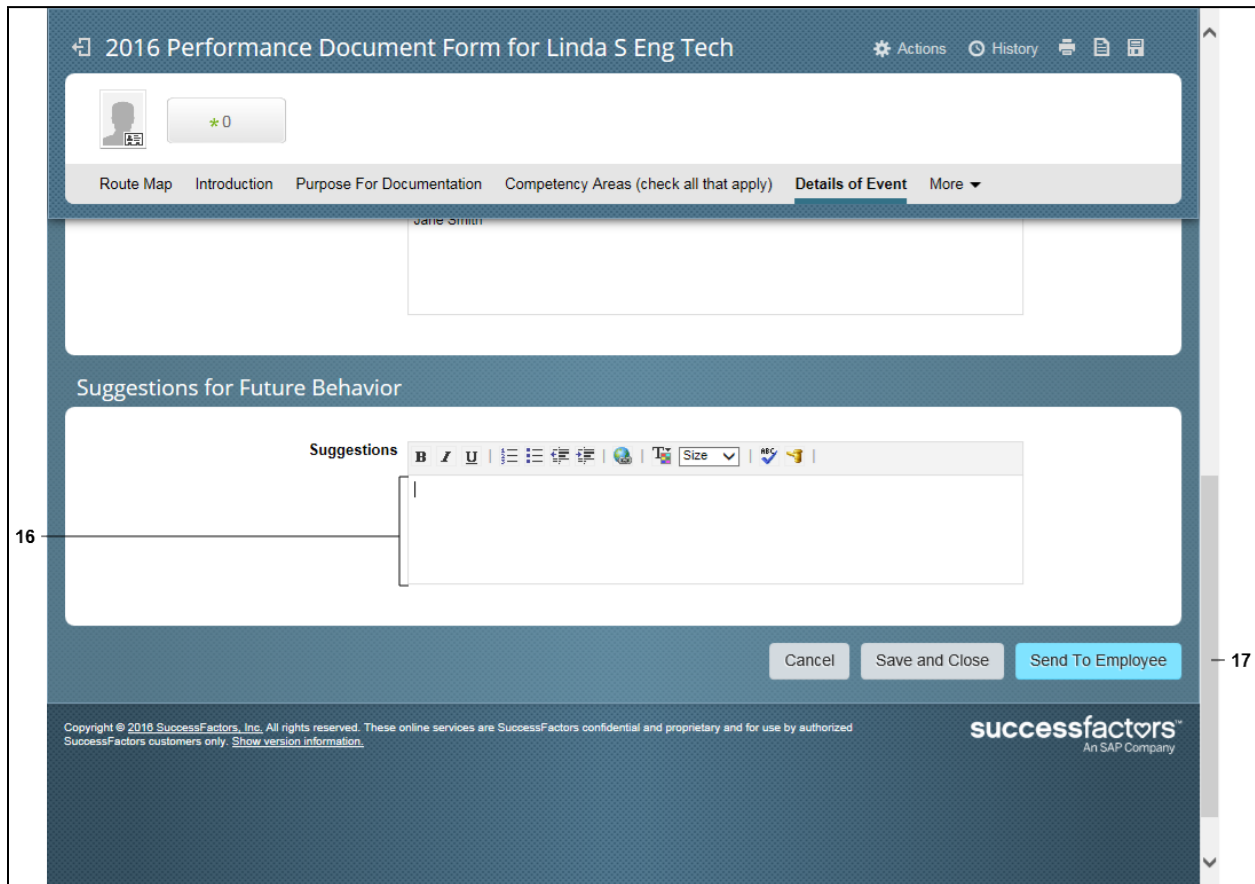
14. Use the vertical scroll bar to view other fields in the **Details of Event** section.

SuccessFactors: Performance Review

15. As required, complete/review the following fields:

Field	R/O/C	Description
If 'Yes', list names	Required	Names of employees who observed the event being documented. **Example:** Jane Smith

SuccessFactors: Performance Review

16. As required, complete/review the following fields:

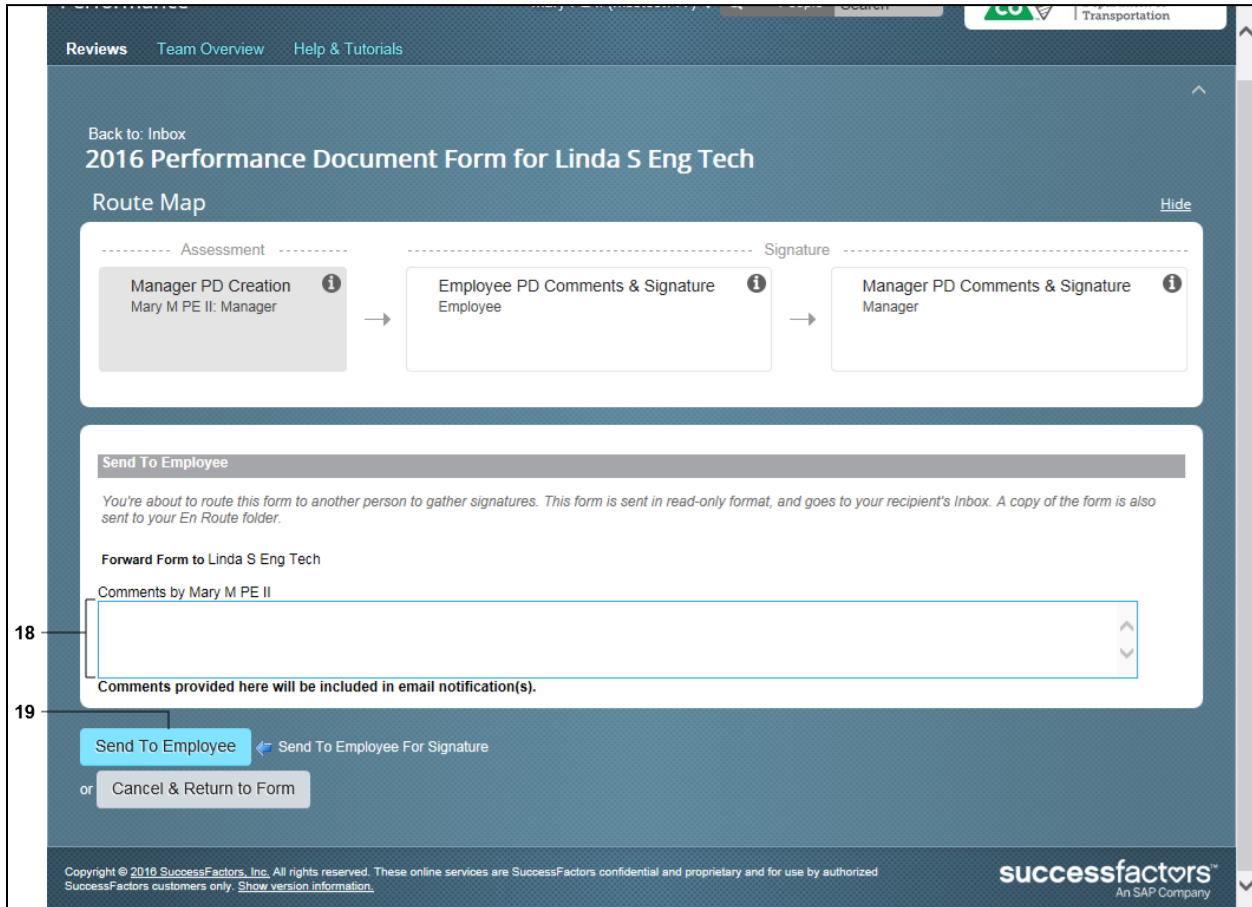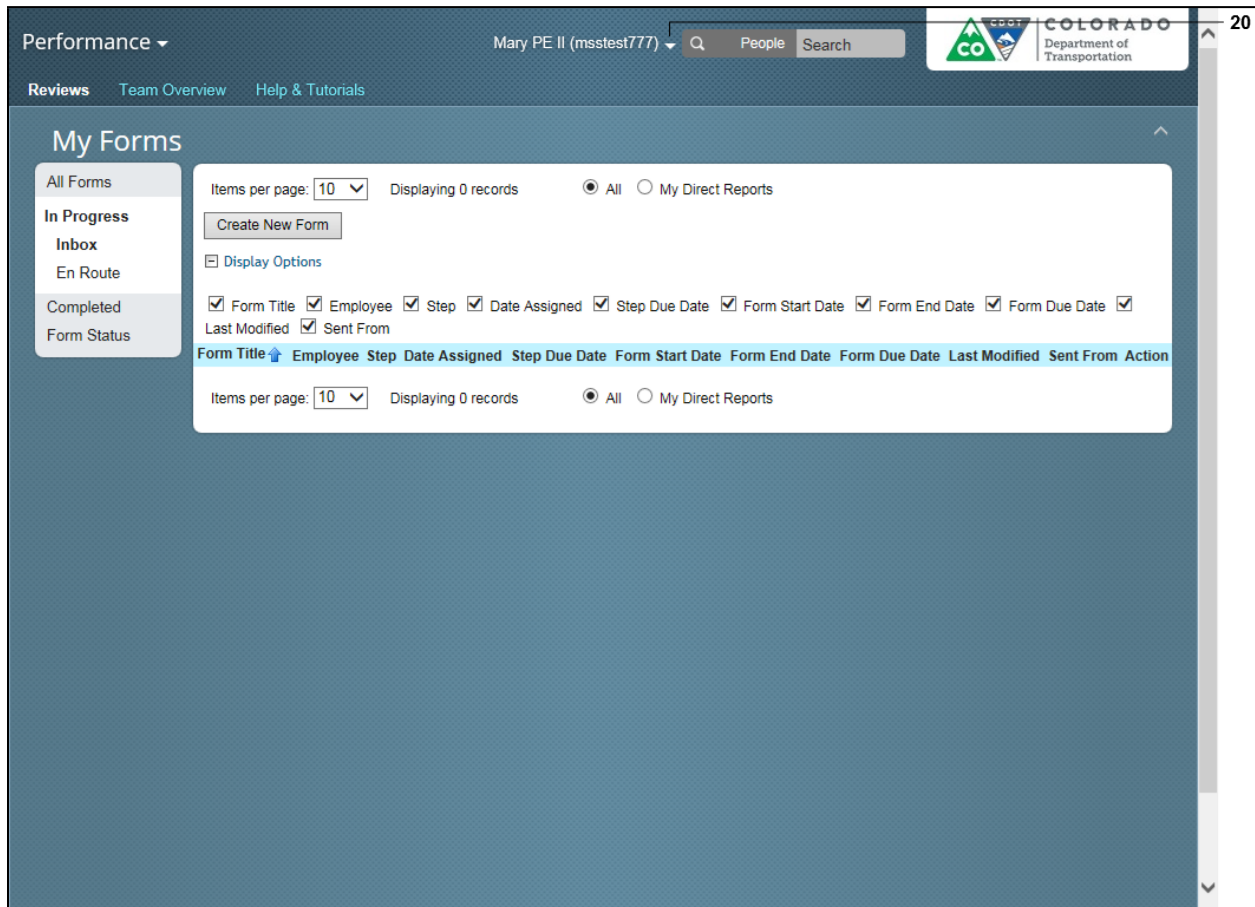| Field	R/O/C	Description
Suggestions	Required	Description of suggestions to employee for future behavior. **Example:** Linda, please keep up the good work!

17. Click **Send To Employee** button Send To Employee to insert a note which will be included in the email notification sent to the employee.

SuccessFactors: Performance Review

18. As required, complete/review the following fields:

Field	R/O/C	Description
Enter a message	Required	Text description. **Example:** Linda, thank you for all of your work. I did not want to forget this for the performance review. Please take a moment to review this and have it back to me within seven days.

19. Click **Send To Employee** button .

SuccessFactors: My Forms

20. To log out, click the drop-down button next to your user ID.

SuccessFactors: My Forms
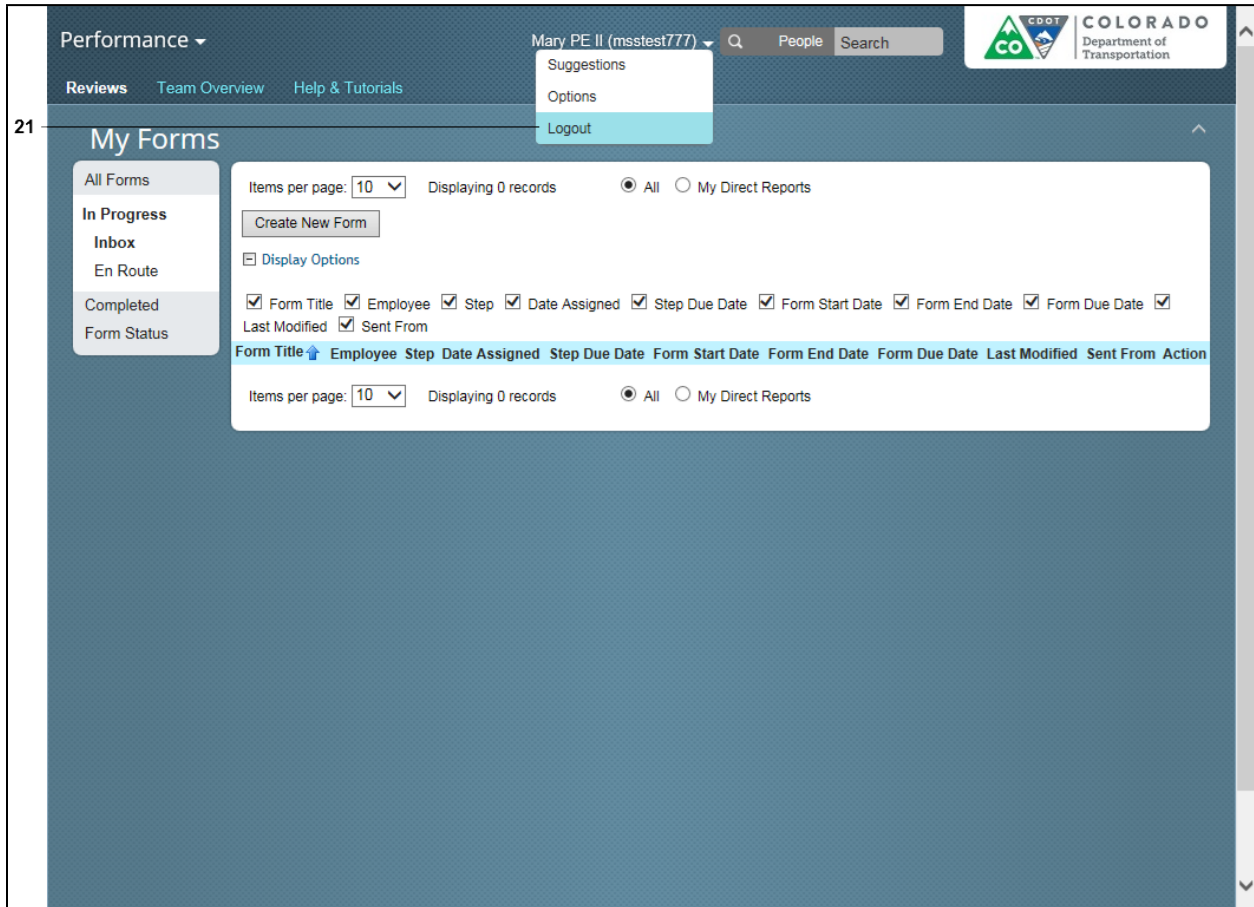
21.

Select **Logout** option Logout from the drop-down menu.

22. You have completed this transaction.

Result

You have created a Performance Document for an Employee.

For feedback on this document, please contact dot_SAPSupport@state.co.us.