

## 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.

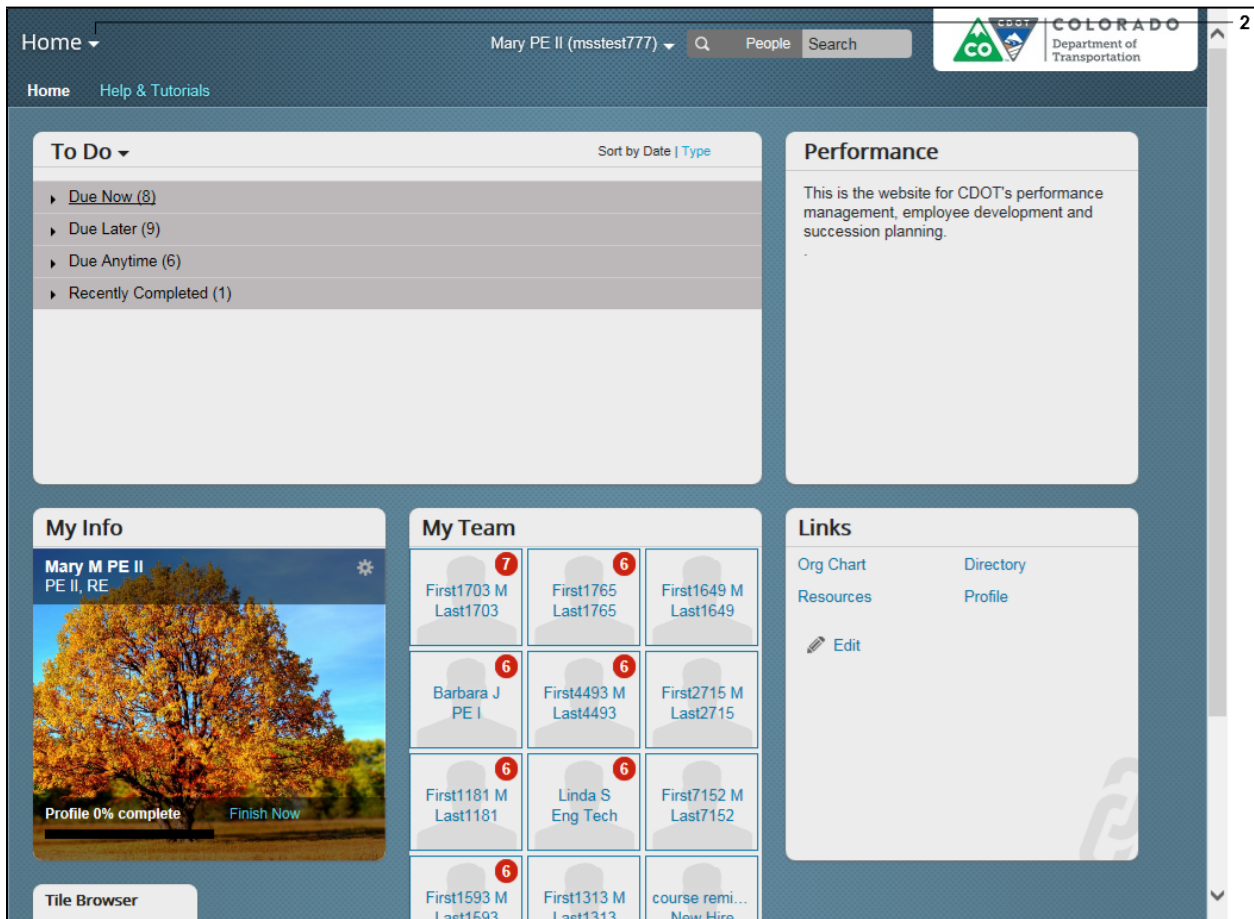
**Procedure**

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**

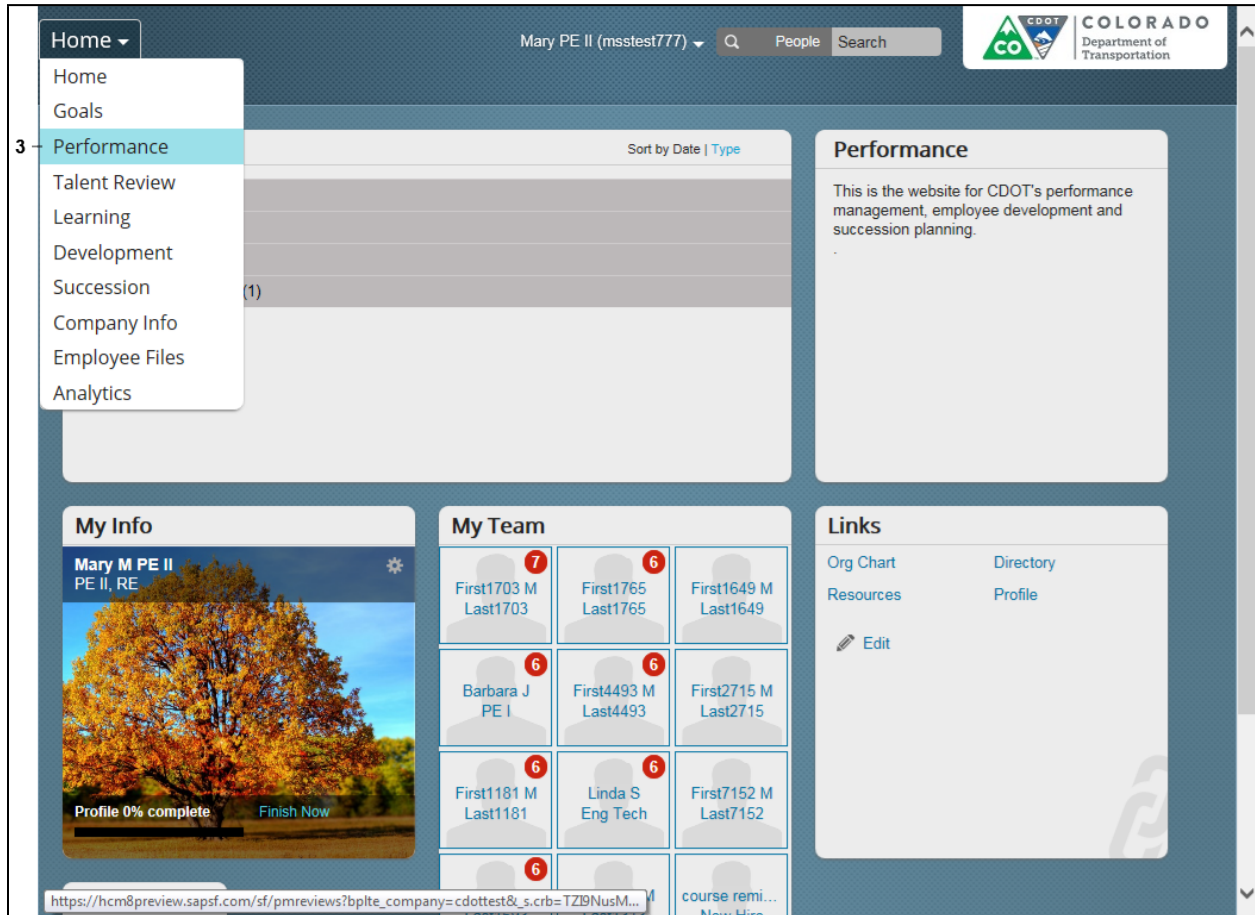


The screenshot shows the SAP NetWeaver Portal SuccessFactors Home page. At the top, there is a navigation bar with 'Home' (selected), 'Help & Tutorials', and a user profile for 'Mary PE II (msstest777)'. A search bar is also present. The main content area is divided into several sections:

- To Do:** A list of tasks categorized by due date: 'Due Now (8)', 'Due Later (9)', 'Due Anytime (6)', and 'Recently Completed (1)'. It includes a 'Sort by Date | Type' option.
- Performance:** A section with the text: 'This is the website for CDOT's performance management, employee development and succession planning.'
- My Info:** A profile card for 'Mary M PE II PE II, RE' with a 'Profile 0% complete' status and a 'Finish Now' button. It features a background image of a tree.
- My Team:** A grid of team member cards, each with a red notification badge containing the number '6'. The cards display names and IDs, such as 'First1703 M Last1703', 'Barbara J PE I', and 'Linda S Eng Tech'.
- Links:** A list of links including 'Org Chart', 'Directory', 'Resources', and 'Profile', along with an 'Edit' button.

2. Click **Home** drop-down button .

### SuccessFactors: Home

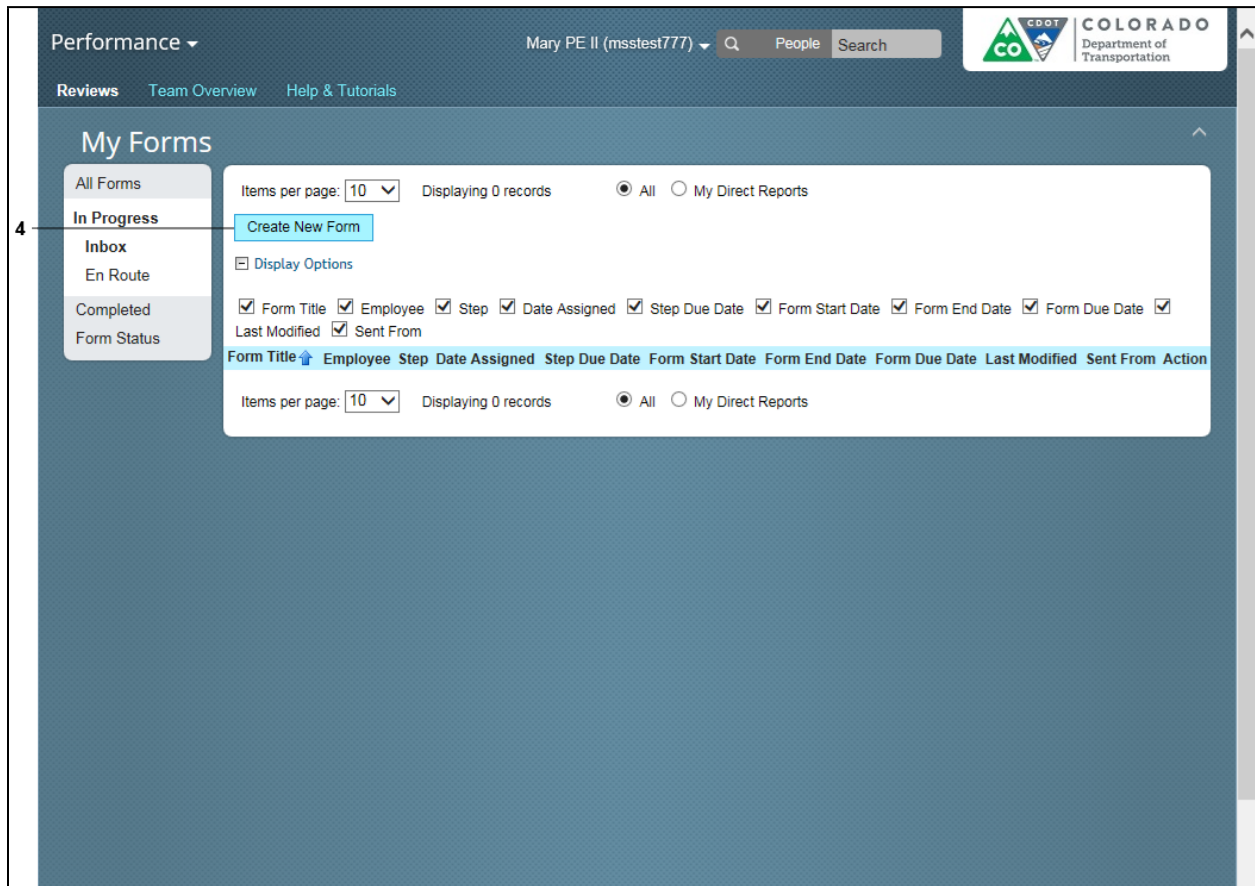



3. Select **Performance** option from the drop-down menu.



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

## SuccessFactors: My Forms



Performance ▾ Mary PE II (msstest777) ▾ People Search 

Reviews Team Overview Help & Tutorials

### My Forms

All Forms  
**In Progress**  
Inbox  
En Route  
Completed  
Form Status

Items per page: 10 ▾ Displaying 0 records  All  My Direct Reports

[Create New Form](#)

Display Options

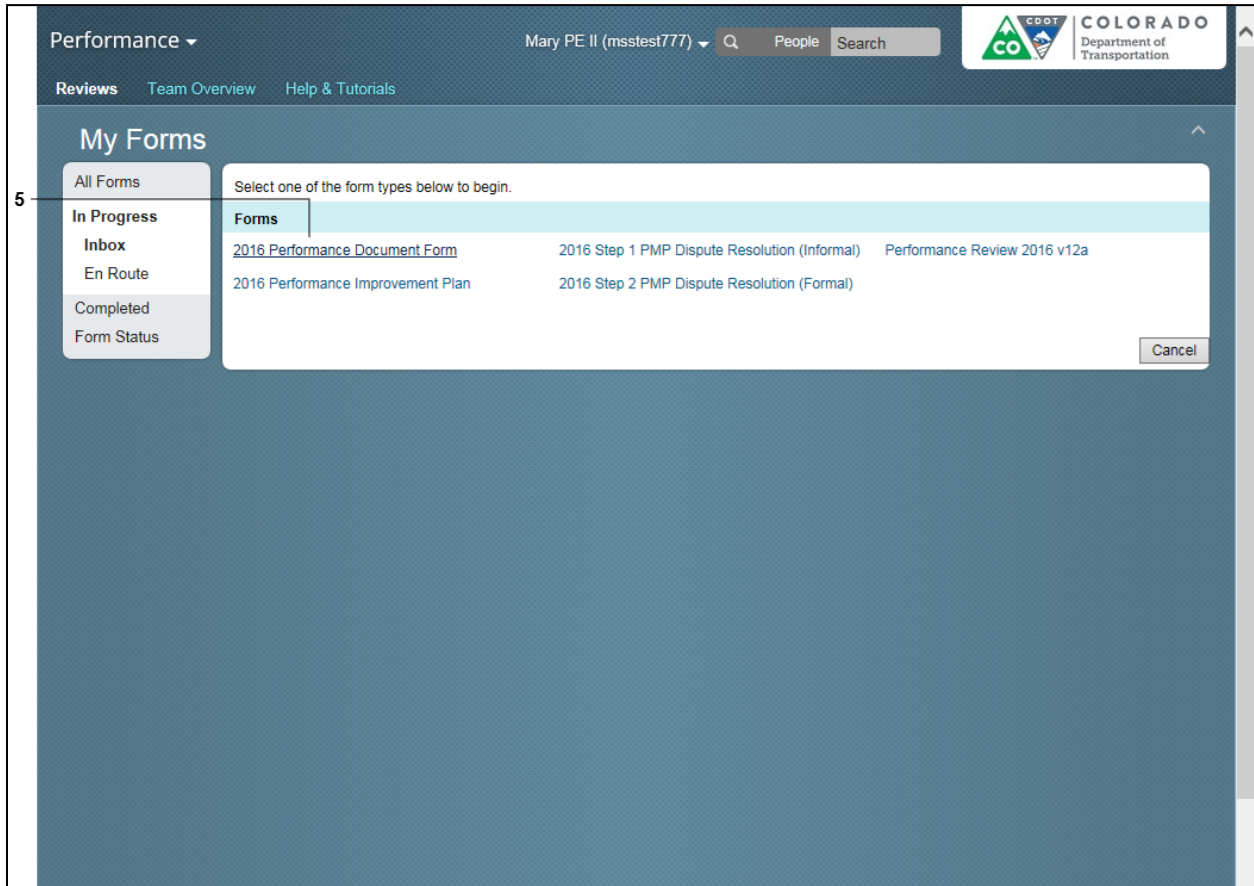
Form Title  Employee  Step  Date Assigned  Step Due Date  Form Start Date  Form End Date  Form Due Date  Last Modified  Sent From

Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
Displaying 0 records										

Items per page: 10 ▾ Displaying 0 records  All  My Direct Reports

4. Click **Create New Form** button 

### SuccessFactors: My Forms



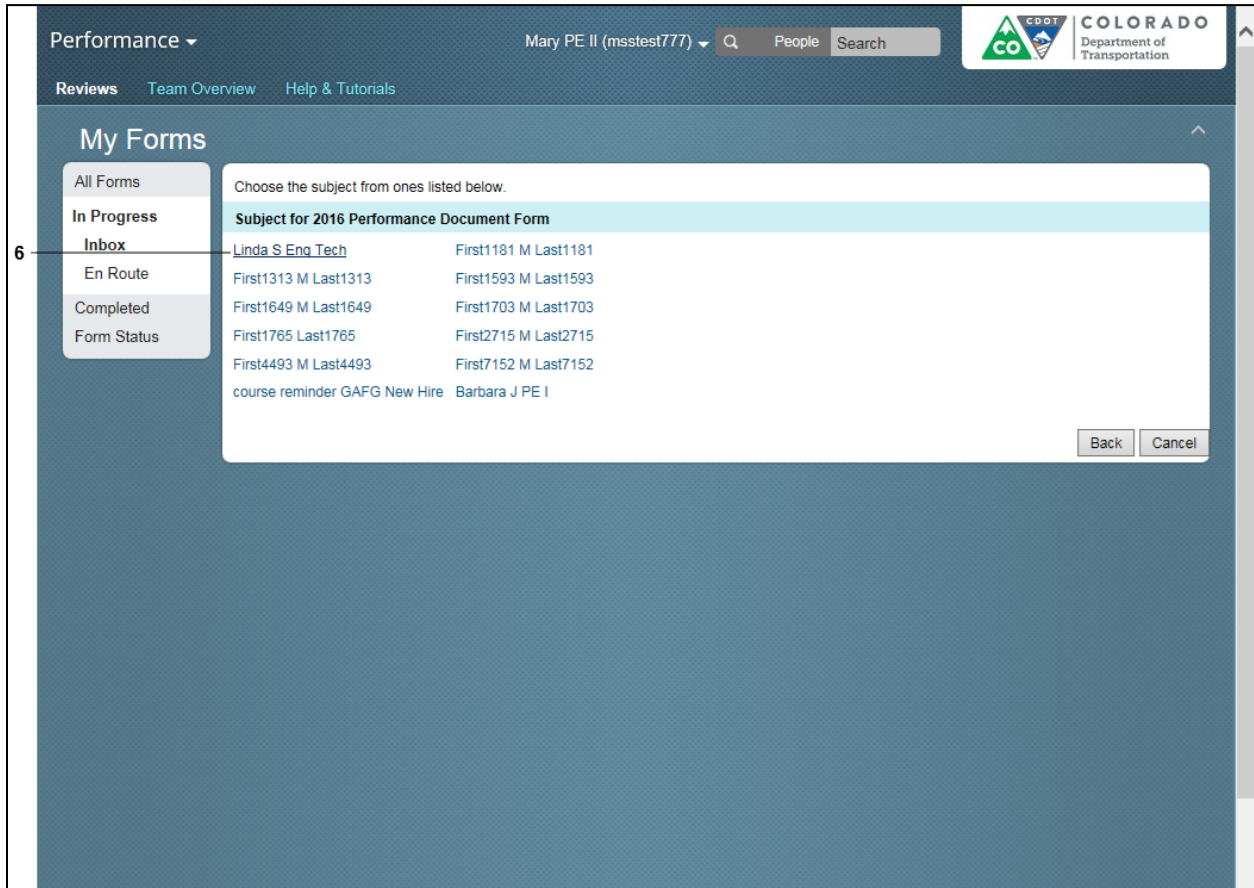
The screenshot shows the SuccessFactors 'My Forms' page. At the top, there is a navigation bar with 'Performance' and a user profile for 'Mary PE II (msstest777)'. Below this are tabs for 'Reviews', 'Team Overview', and 'Help & Tutorials'. The main content area is titled 'My Forms' and features a left-hand sidebar with a menu: 'All Forms', 'In Progress', 'Inbox', 'En Route', 'Completed', and 'Form Status'. The 'All Forms' menu item is highlighted with a number '5' next to it. The main content area contains a message: 'Select one of the form types below to begin.' Below this message is a table of form types:

Forms		
<a href="#">2016 Performance Document Form</a>	2016 Step 1 PMP Dispute Resolution (Informal)	Performance Review 2016 v12a
2016 Performance Improvement Plan	2016 Step 2 PMP Dispute Resolution (Formal)	

A 'Cancel' button is located at the bottom right of the form selection area.

5. Click **2016 Performance Document Form** link [2016 Performance Document Form](#) .

### SuccessFactors: My Forms



Performance ▾ Mary PE II (msstest777) People Search

Reviews Team Overview Help & Tutorials

#### My Forms

- All Forms
- In Progress
- Inbox**
- En Route
- Completed
- Form Status

Choose the subject from ones listed below.

**Subject for 2016 Performance Document Form**

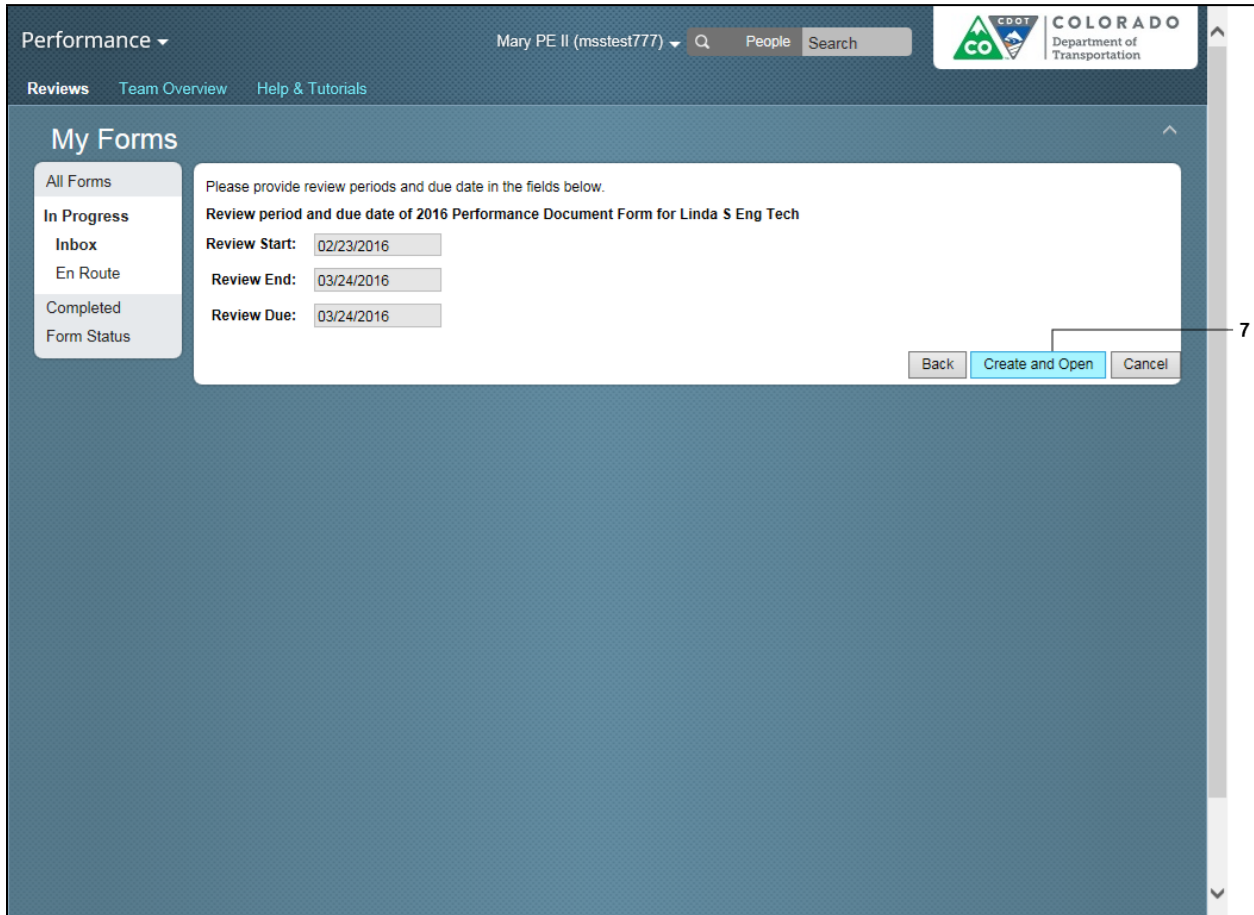
<a href="#">Linda S Eng Tech</a>	First1181 M Last1181
First1313 M Last1313	First1593 M Last1593
First1649 M Last1649	First1703 M Last1703
First1765 Last1765	First2715 M Last2715
First4493 M Last4493	First7152 M Last7152
course reminder GAFG New Hire	Barbara J PE I

Back Cancel

6. Click the link for the employee's name.

**Example:** Linda S Eng Tech

### SuccessFactors: My Forms

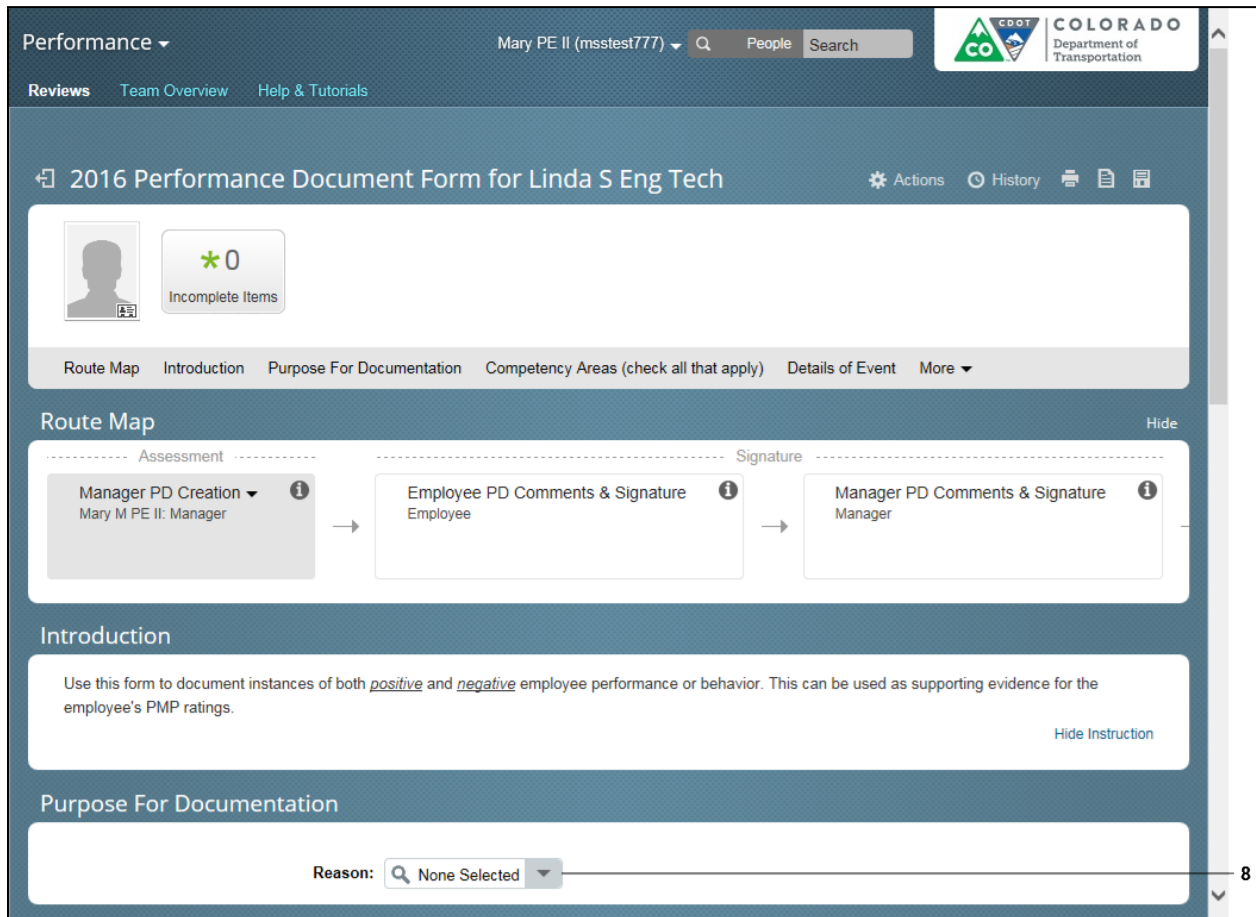



7. Click **Create and Open** button .



The dates for the Performance document are preset and cannot be changed.


## SuccessFactors: Performance Review



Performance ▾ Mary PE II (msstest777) People Search 

Reviews Team Overview Help & Tutorials




2016 Performance Document Form for Linda S Eng Tech Actions History

 \*0 Incomplete Items

Route Map Introduction Purpose For Documentation Competency Areas (check all that apply) Details of Event More ▾

Route Map Hide


Assessment Signature


Manager PD Creation ▾  Mary M PE II: Manager → Employee PD Comments & Signature  Employee → Manager PD Comments & Signature  Manager

Introduction

Use this form to document instances of both *positive* and *negative* employee performance or behavior. This can be used as supporting evidence for the employee's PMP ratings. Hide Instruction

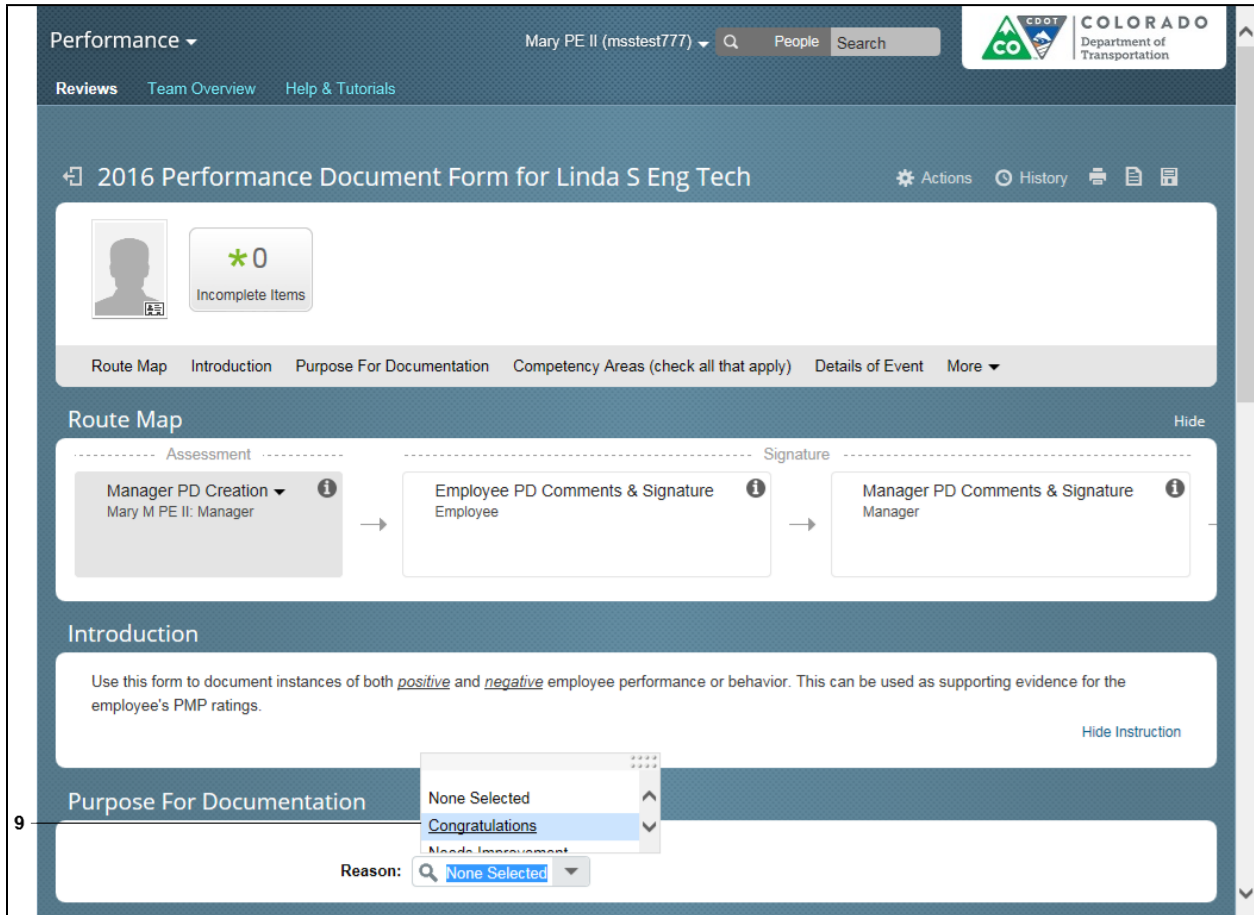
Purpose For Documentation

Reason:   8

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



### SuccessFactors: Performance Review

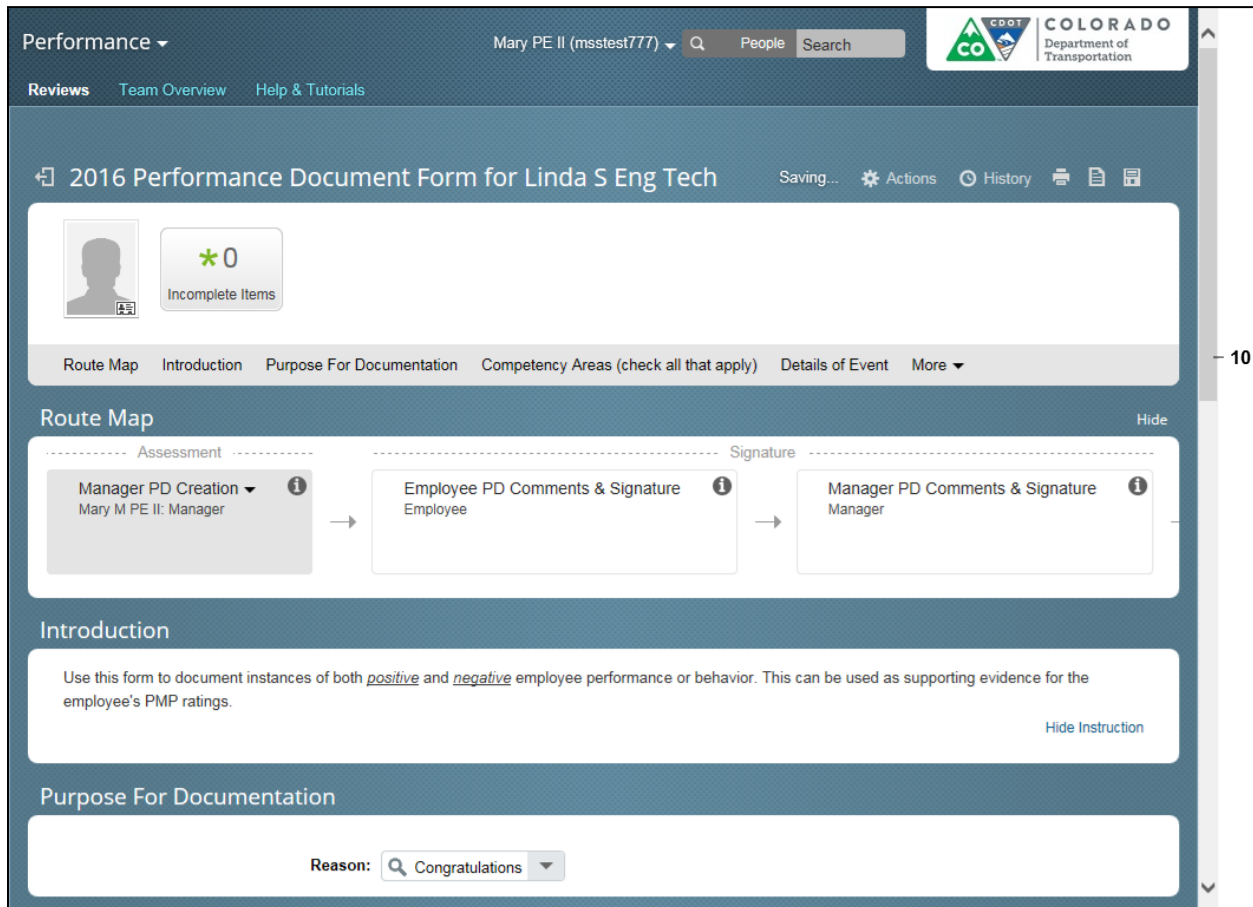


9. Select the Performance Document type from the drop-down menu.

#### 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*.

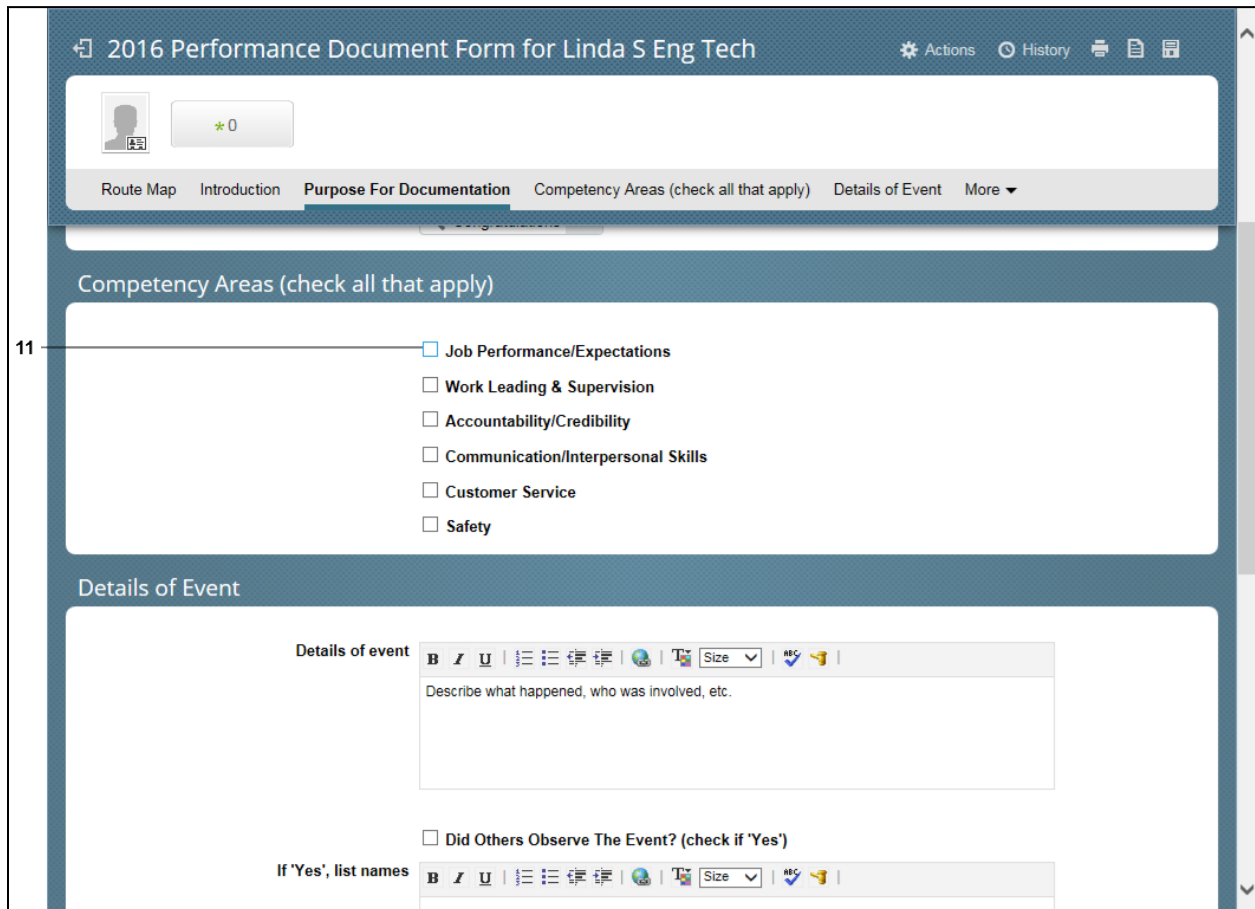
**SuccessFactors: Performance Review - Windows Internet Explorer**

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



2016 Performance Document Form for Linda S Eng Tech

Route Map Introduction **Purpose For Documentation** Competency Areas (check all that apply) Details of Event More

Competency Areas (check all that apply)

Job Performance/Expectations

Work Leading & Supervision

Accountability/Credibility

Communication/Interpersonal Skills

Customer Service

Safety

Details of Event

Details of event

Describe what happened, who was involved, etc.

Did Others Observe The Event? (check if 'Yes')

If 'Yes', list names

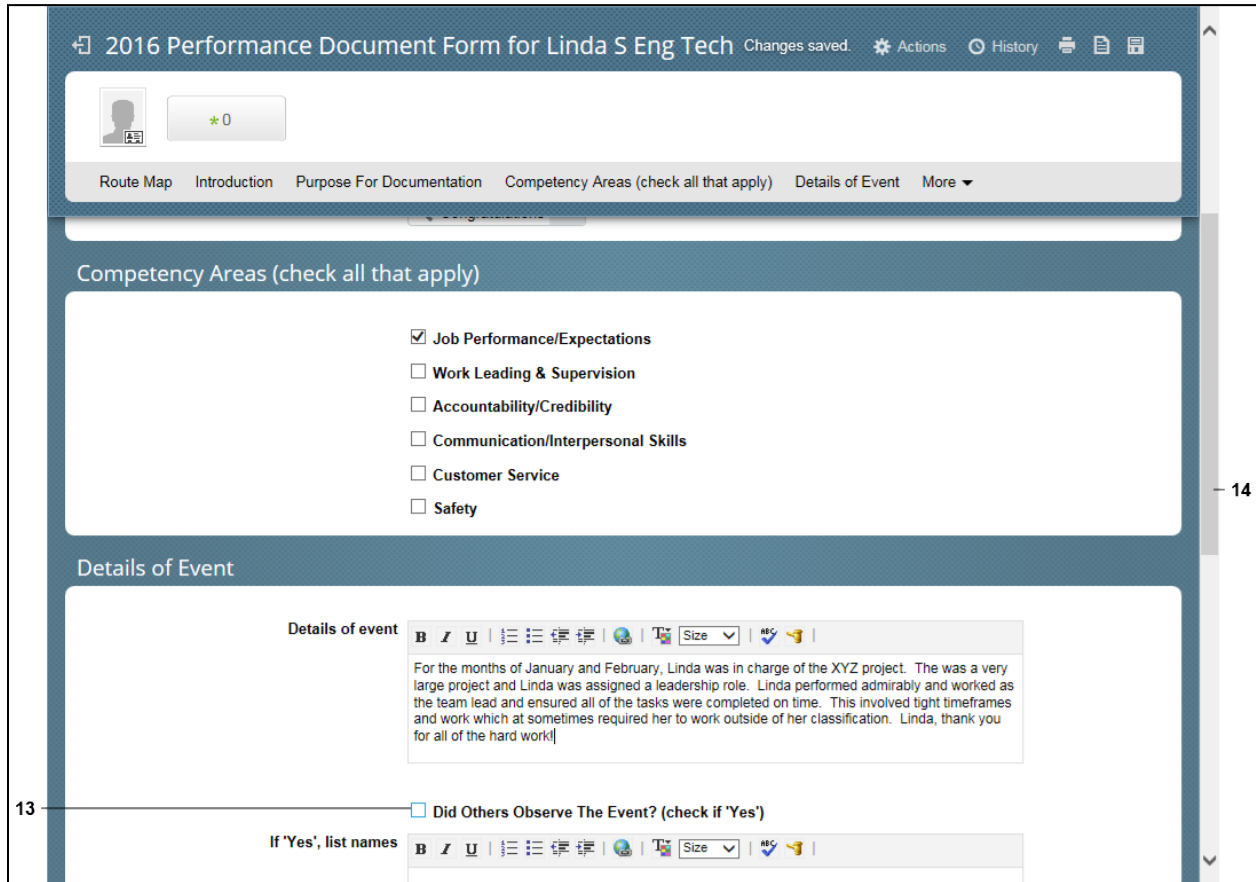
11. Select **Job Performance/Expectations** check box .



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



2016 Performance Document Form for Linda S Eng Tech Changes saved. Actions History

Route Map Introduction Purpose For Documentation Competency Areas (check all that apply) Details of Event More

### Competency Areas (check all that apply)

- Job Performance/Expectations
- Work Leading & Supervision
- Accountability/Credibility
- Communication/Interpersonal Skills
- Customer Service
- Safety

### Details of Event

Details of event

For the months of January and February, Linda was in charge of the XYZ project. The was a very large project and Linda was assigned a leadership role. Linda performed admirably and worked as the team lead and ensured all of the tasks were completed on time. This involved tight timeframes and work which at sometimes required her to work outside of her classification. Linda, thank you for all of the hard work!

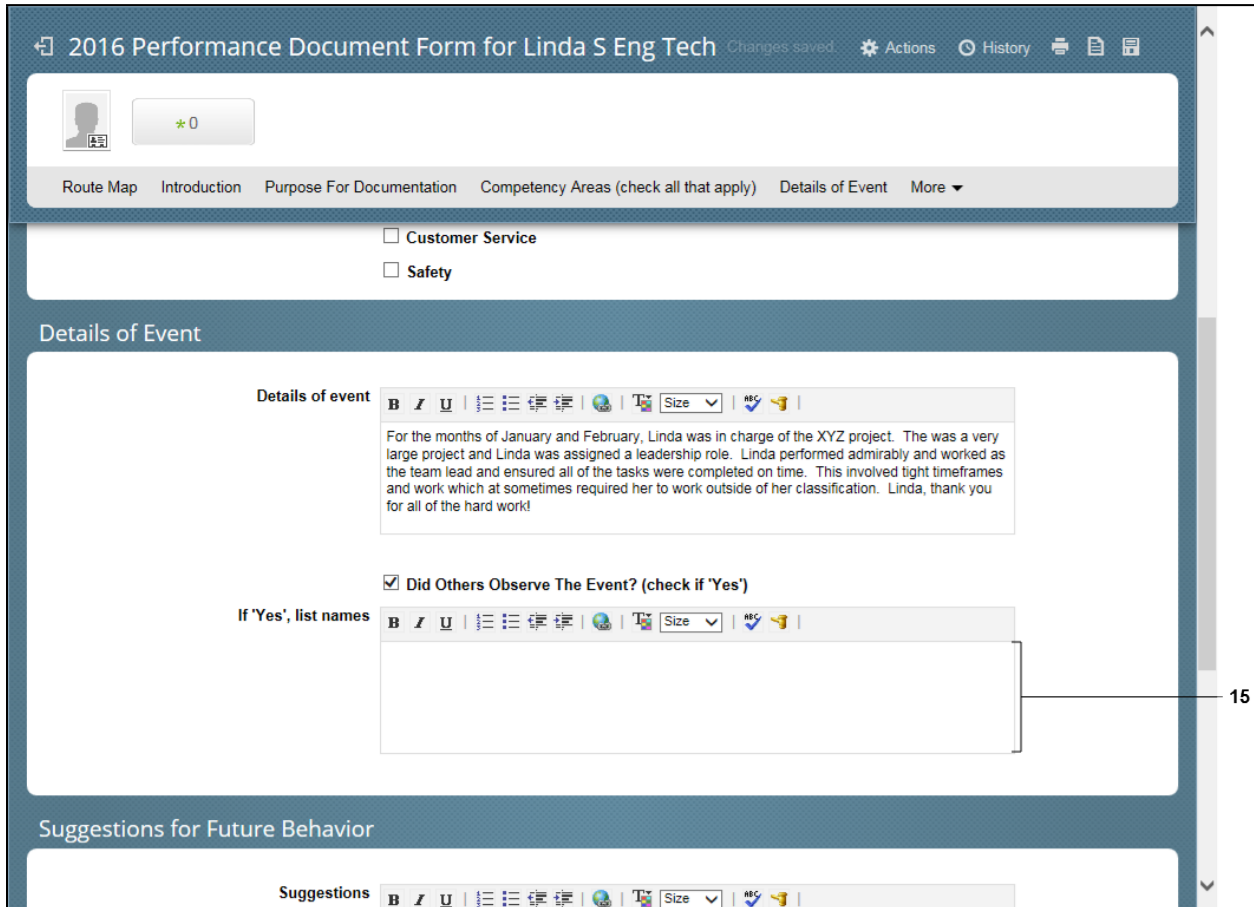
13  Did Others Observe The Event? (check if 'Yes')

If 'Yes', list names

14

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





2016 Performance Document Form for Linda S Eng Tech Changes saved. Actions History Print Save

Route Map Introduction Purpose For Documentation Competency Areas (check all that apply) Details of Event More ▾



Customer Service  
 Safety

**Details of Event**



Details of event **B** *I* U |  Size ▾ | ABC | 

For the months of January and February, Linda was in charge of the XYZ project. The was a very large project and Linda was assigned a leadership role. Linda performed admirably and worked as the team lead and ensured all of the tasks were completed on time. This involved tight timeframes and work which at sometimes required her to work outside of her classification. Linda, thank you for all of the hard work!

Did Others Observe The Event? (check if 'Yes')

If 'Yes', list names **B** *I* U |  Size ▾ | ABC | 

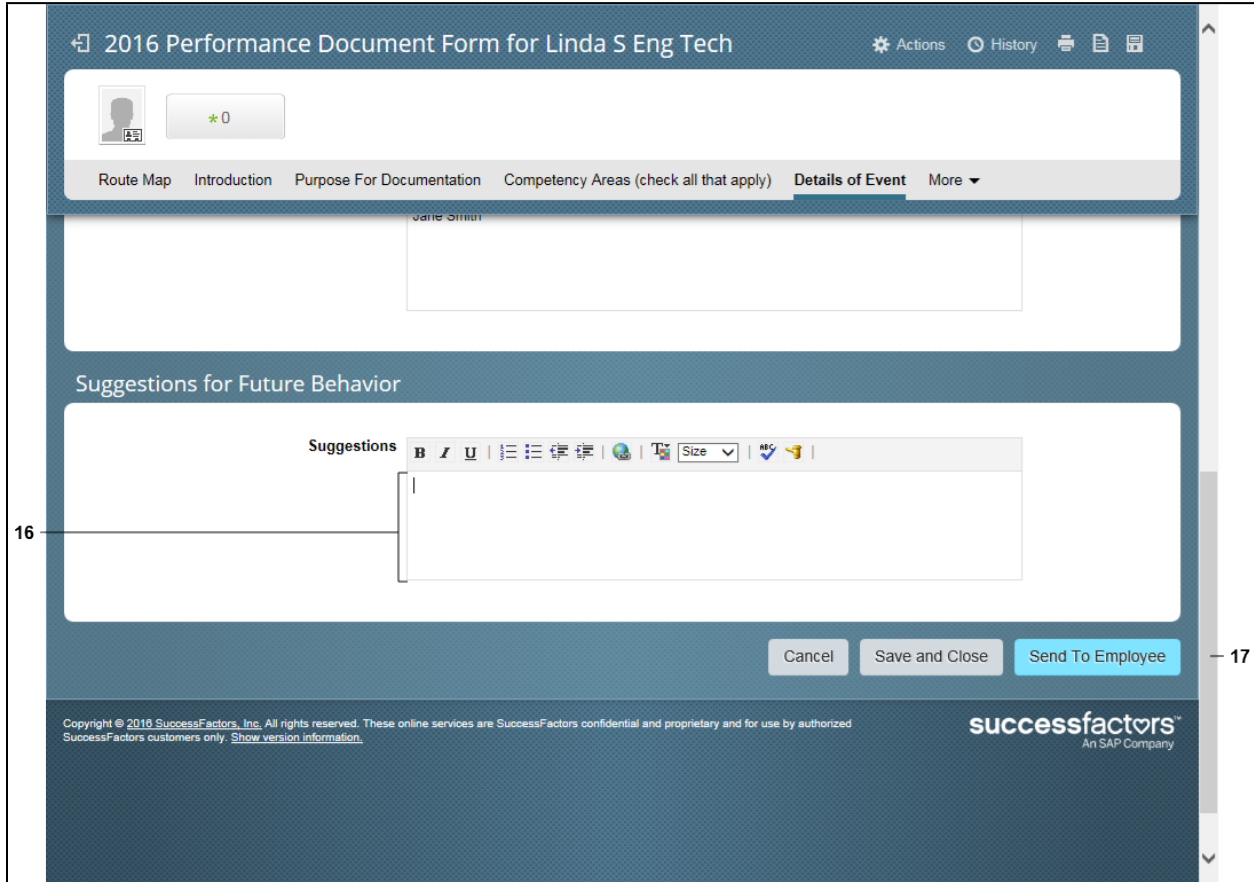
Suggestions for Future Behavior

Suggestions **B** *I* U |  Size ▾ | ABC | 

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.  <b>Example:</b> Jane Smith

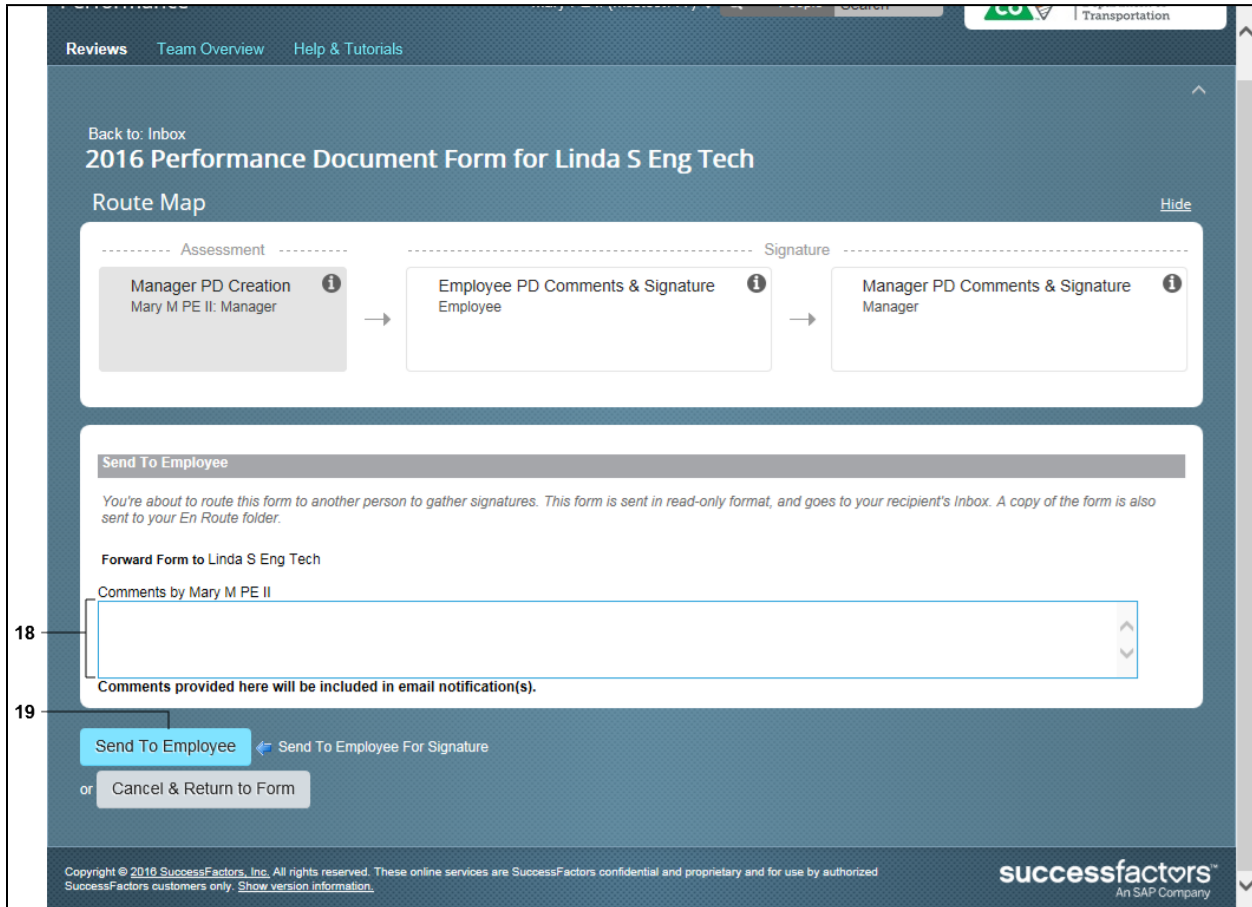
**SuccessFactors: Performance Review**



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

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

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

**SuccessFactors: Performance Review**


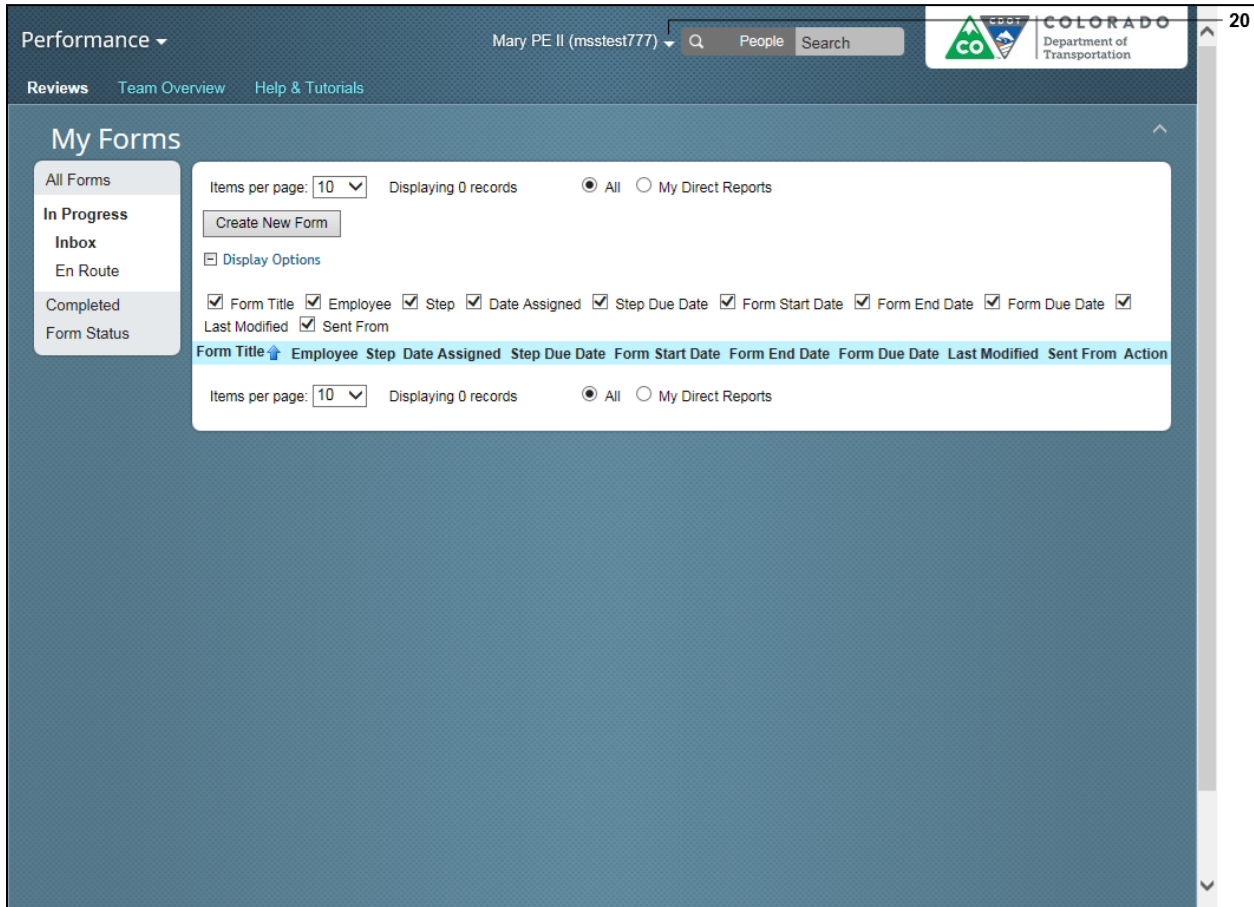
18. As required, complete/review the following fields:


Field	R/O/C	Description
Enter a message	Required	Text description. <b>Example:</b> 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 .

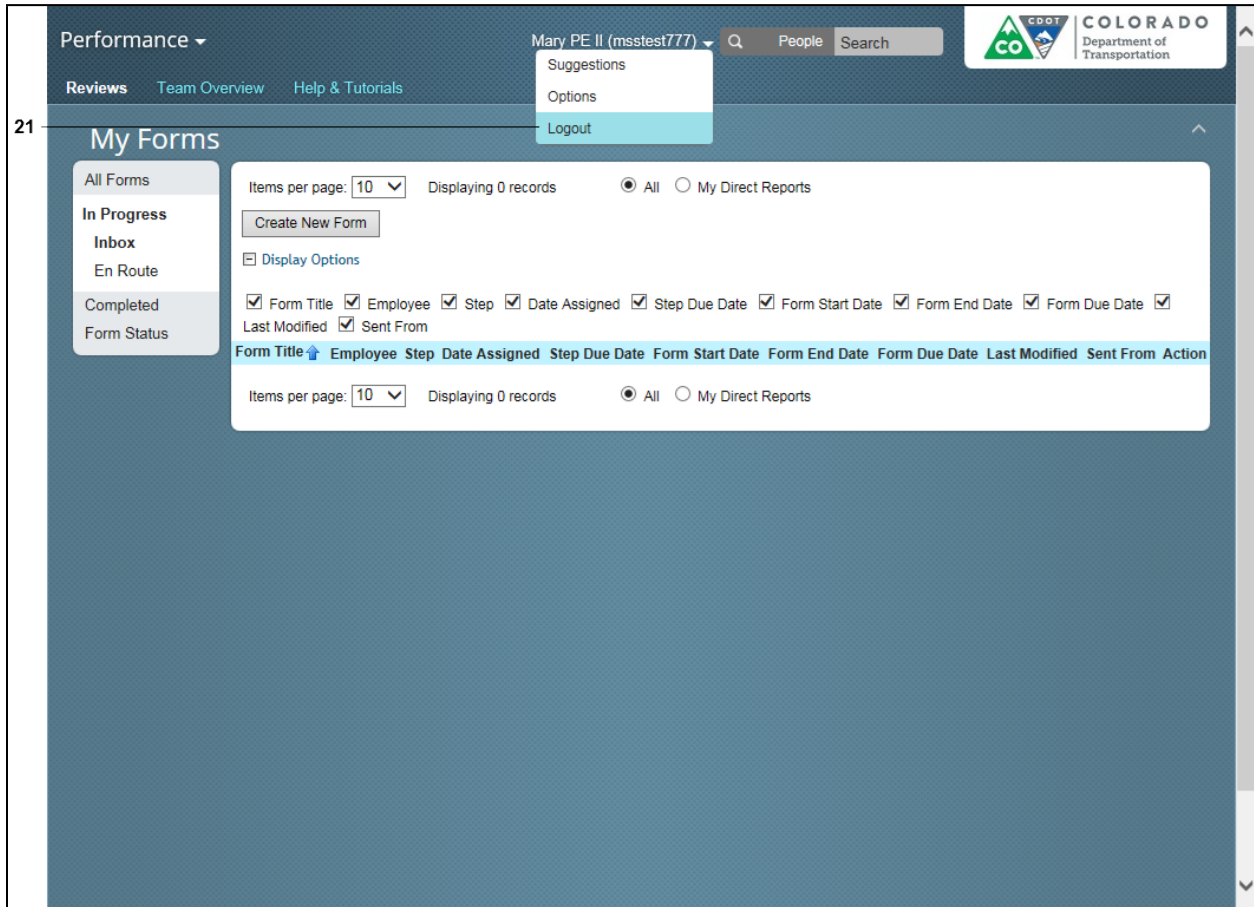


### SuccessFactors: My Forms



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](mailto:dot_SAPSupport@state.co.us).