Q: How do I delete a KPI for an employee?

A: STEP 1 OF 2:

Open the employee’s IPP, and click on the box next to the KPI you want to delete:

<table>
<thead>
<tr>
<th>Visibility</th>
<th># KPI</th>
<th>KPI Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>4.1</td>
<td>Policies and procedures for benefits, modified and implemented</td>
</tr>
</tbody>
</table>

STEP 2 OF 2:

After you check the box of the KPI you want to delete, click on the Delete Selected button:
Q: Is there a way to assign my KPI(s) to my employee(s)?

A: STEP 1 OF 2:

Yes; in your IPP, check the box next to the KPI you wish to assign to your employee(s):

<table>
<thead>
<tr>
<th>Visibility</th>
<th># KPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>4.1 Policies and procedures for benefits, modified and implemented</td>
</tr>
</tbody>
</table>

STEP 2 OF 2:

After you check the box of the KPI(s), click on the Cascade Selected button:

Use this worksheet to add or update the KPIs.
**Mid-Year Review**

**Q:** After the mid-year review or employee self-evaluation is due for employees, why do I not see the employee in my queue?

**A:** The employee has most likely not completed his/her portion of the review, or they have not sent it to you. Contact the employee and ask him/her to log in to Success Factors to verify they clicked the Send to Leader button after they completed their evaluation.

**Q:** How do I view a document that one of my employees has attached to their evaluation?

**A:** There are two ways to view a document an employee has attached.

**OPTION 1 of 2:**

**STEP 1 OF 1:**
From the Home Page of Success Factors, find the employee’s whose document you want view in the box labeled “My Team” and click on their name:
**STEP 2 OF 2:**
Click on the word “Actions”:

![Actions Button](image)

Katherine is on track

**STEP 3 OF 4:**
Click on the word “Profile”:

![Profile Button](image)

Go To
- Public Profile
- Profile
- Scorecard
- Notes
- History
- 2015 Annual Performance Evaluation
- KPI Plan
- Development Plan
STEP 4 OF 4:
Under the section for Document Attachments, click on the link for the document you wish to view:

![Document Attachments Image]

OPTION 2 of 2:

STEP 1 of 3:
In the search box next to your name at the top of the page, choose People and type in the last name of the employee to find them. Click on the employee’s name.

![Search Box Image]

STEP 2 of 3:
Click on Public Profile and choose Profile.

![Public Profile Image]
STEP 3 OF 3:
Under the section for Document Attachments, click on the link for the document you wish to view:

Q: When I have finished with the leader portion of the mid-year review, what is the next step?

A: If you need the employee to add or edit information in the KPI, you can choose the option to send the form back to the employee. Otherwise, once you have completed the form and met with the employee, you would click on Send to the Next Step (the next step is On-going Feedback).

Q: During the mid-year review meeting with my employees, am I only reviewing the status of their KPIs?

A: No; you should review their KPIs, as well as discuss general performance. This includes discussing what the employee is doing well, as well as any performance or behavior concerns you may have. You should also have the discussion about the leadership competencies for leaders.
Performance Evaluation

Q: Do my new employees have to complete an IPP and/or a performance evaluation?

A: See chart below. As a reminder, anyone hired in the academic year, up to the dates listed below, should create KPIs upon hire.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Performance Management Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Individual Performance Plan (IPP)</td>
</tr>
<tr>
<td>Administrators and Staff Hired prior to Jan 31</td>
<td>Yes *</td>
</tr>
<tr>
<td>Administrators and Staff Hired Feb 1 - April 30</td>
<td>No</td>
</tr>
<tr>
<td>Faculty Hired on or after January 6</td>
<td>No</td>
</tr>
<tr>
<td>(for the Spring semester)</td>
<td></td>
</tr>
</tbody>
</table>

* If an IPP has not been created, please develop one with your employee no later than February 7 in the SuccessFactors system.

Q: What should I write in the Validation meeting notes section?

A: This is where you should document the reasons for any change to ratings as a result of the validation process. If the rating did not change, you should include comments from validation supporting the specific rating given.