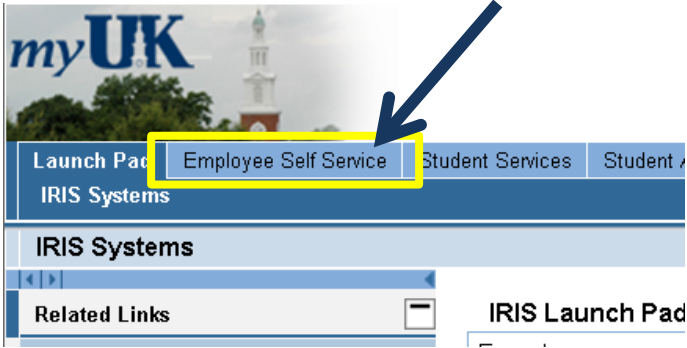
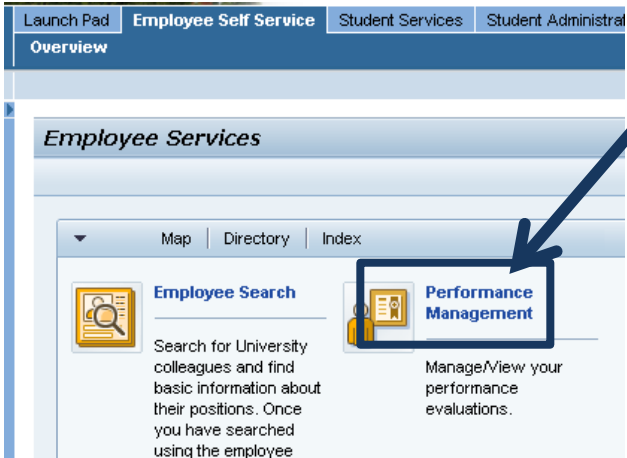



UK Online PE System – Managing the PE Process for Campus Supervisors

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.

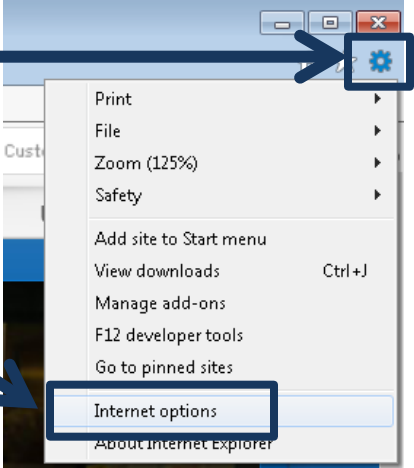
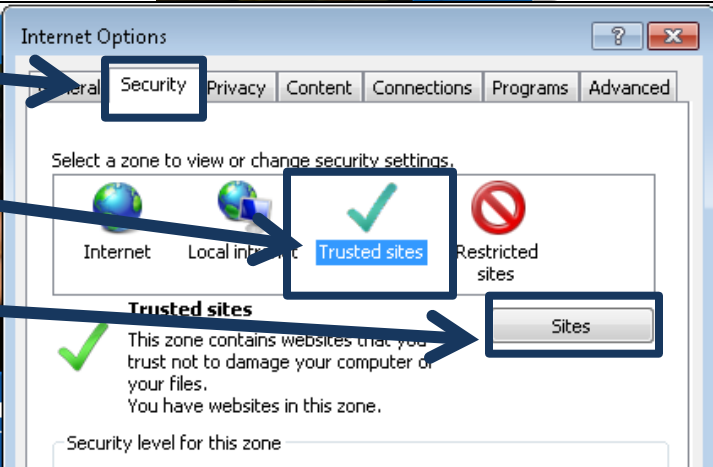
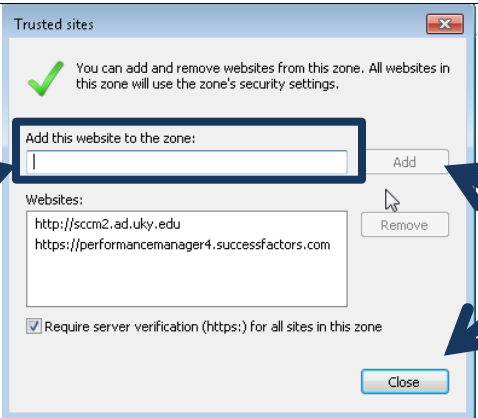
Access the UK Online PE System via myUK

Step	Action	
1	From myUK, click on the Employee Self Service Tab	
2	Click on the Performance Management link	
3	Click on the Performance Goals and Evaluations link This link takes you to the UK Online PE System.	

UK Online PE System – Managing the PE Process for Campus Supervisors

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.

Step	Action	
1	From an open browser session, click on Tools , Then Internet Options .	
2	In the Internet Options popup, click on the Security tab, Then select Trusted Sites , Then click on the Sites button.	
3	Enter the SuccessFactors URL in the Add this website to the zone: field, <div style="background-color: #e67e22; color: white; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">SuccessFactors URL</p> <p style="text-align: center;">https://performancemanager4.successfactors.com</p> </div>	 <div style="background-color: #2980b9; color: white; padding: 5px; margin-top: 10px;"> <p>Then click the Add button,</p> <p>The Close button,</p> <p>And finally the OK button.</p> </div>

UK Online PE System – Managing the PE Process for Campus Supervisors

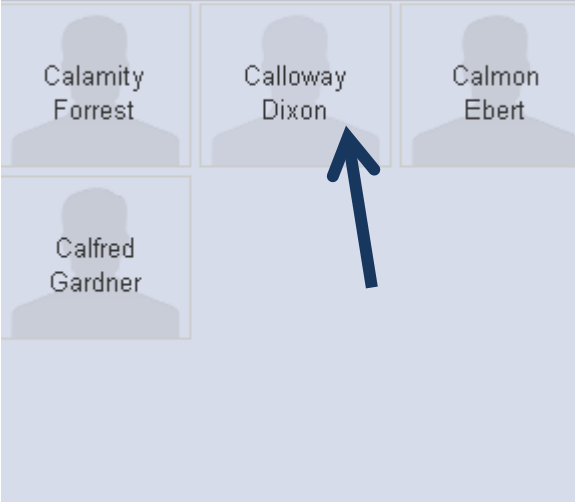
Basic Navigation – Accessing Employee Performance Evaluation Forms

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

Option One:

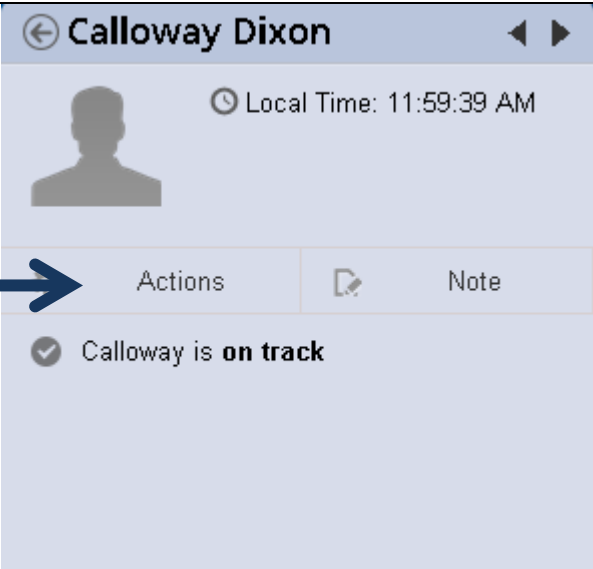
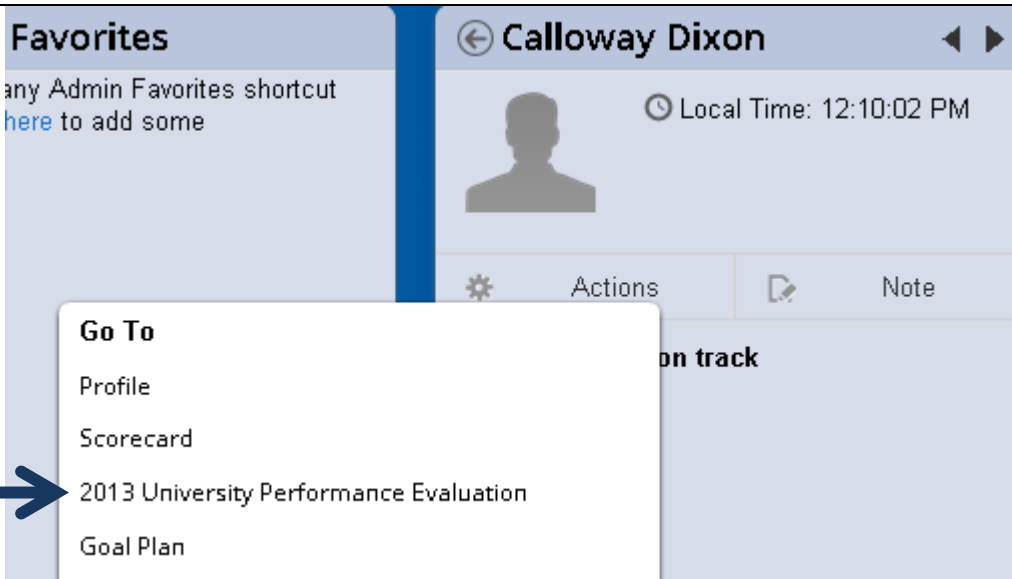
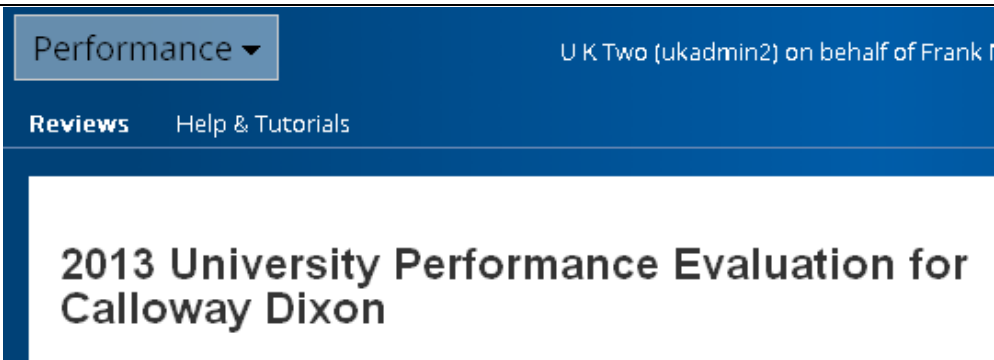
- Locate the **My Team** tile
- Click on the employee record you wish to view

My Team



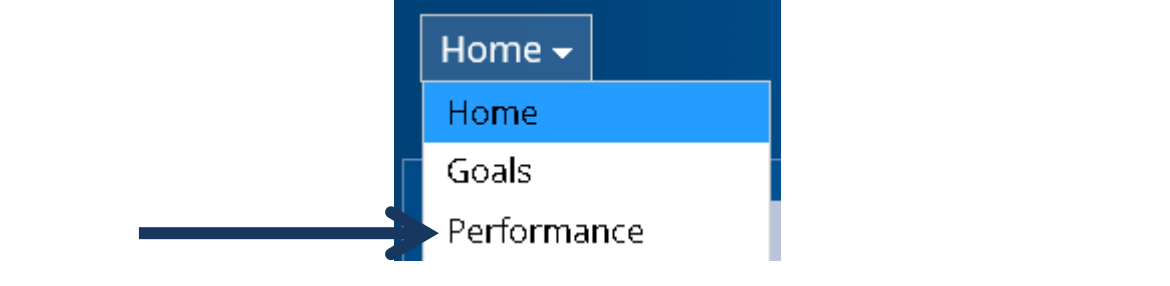
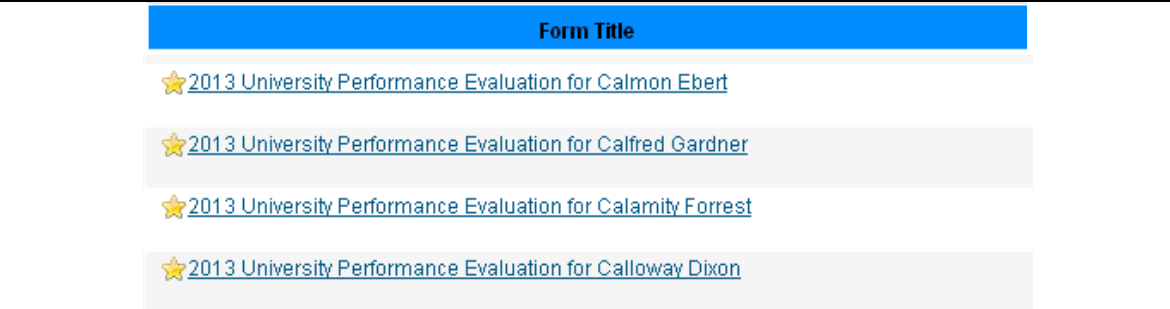


UK Online PE System – Managing the PE Process for Campus Supervisors

Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

<ul style="list-style-type: none">Click on the Actions link	
<ul style="list-style-type: none">Click on the Performance Evaluation link	
<ul style="list-style-type: none">You are taken directly to the employee's PE form, if it has been released	

UK Online PE System – Managing the PE Process for Campus Supervisors

Basic Navigation – Accessing Employee Performance Evaluation Forms, continued

<p>Option Two:</p> <ul style="list-style-type: none"> From the Home Page, click on the Navigation Menu and choose Performance 	 <p>A screenshot of the system's navigation menu. The 'Home' dropdown menu is open, showing options: Home, Goals, and Performance. A blue arrow points to the 'Performance' option.</p>
<ul style="list-style-type: none"> There are four main sections in the My Forms menu 	<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>All Forms: contains all forms, currently active or completed</p> <p>Completed: contains all completed forms</p> <p>Form Status: view form status</p> </div> <div style="width: 35%; text-align: center;"> <h3>My Forms</h3> <ul style="list-style-type: none"> All Forms In Progress Inbox En Route Completed Form Status </div> <div style="width: 30%;"> <p>In Progress: <i>Inbox</i> - contains active forms requiring your attention</p> <p><i>En Route</i> – contains active forms “currently with” another person in the PE process, this is normally the employee</p> </div> </div>
<ul style="list-style-type: none"> From any of the sections, Click on the PE link you would like to view in the Form Title column 	 <p>A screenshot of the 'Form Title' column in the 'My Forms' section. It lists four performance evaluation forms, each with a star icon and a link: '2013 University Performance Evaluation for Calmon Ebert', '2013 University Performance Evaluation for Calfred Gardner', '2013 University Performance Evaluation for Calamity Forrest', and '2013 University Performance Evaluation for Calloway Dixon'.</p>
<ul style="list-style-type: none"> You are taken to the employee’s PE form 	 <p>A screenshot of the '2013 University Performance Evaluation for Calloway Dixon' form. The breadcrumb trail shows 'Performance' > 'Reviews'. The user is identified as 'U K Two (ukadmin2) on behalf of Frank T...'. The page title is '2013 University Performance Evaluation for Calloway Dixon'.</p>
<ul style="list-style-type: none"> To return to the PE form listing, click on the Reviews link 	 <p>A screenshot of the navigation menu with the 'Performance' dropdown menu open. The 'Reviews' link is highlighted, and a blue arrow points to it. The page title '2013 Unive' is partially visible at the bottom.</p>

UK Online PE System – Managing the PE Process for Campus Supervisors

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.

Performance Evaluation Introduction

The employee may complete a self-evaluation and then forward 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.

UK Online PE System – Managing the PE Process for Campus Supervisors

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.

Major Job Responsibilities

In this section employee will self-rate and managers will rate the employee's performance of the MJRs. Updates to the job standards can be made in this section. MJR and Essential Function updates cannot be made here - those updates must be made in the Position Description System.

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 Mabeline Manager:
[Manager Rating:](#) unrated

Mabeline Manager's Comments:
 No comments

Rating by Cal Abbott:
[Rating:](#) unrated

Subjects Comments:
[spell check...](#) [legal scan...](#)

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.

MJR Non Leadership Rating Scale		
Scale Value	Description	Detailed Information
1.0	Does Not Meet Expectations	• Employee did not consistently meet the job standards • Performance needs improvement in areas of consistent weakness • Employee requires close supervision to meet expectations • If employee fails to improve, corrective action may be recommended
2.0	Meets Expectations	• Employee consistently met the job standards • Results were timely and accurate and were produced with minimum supervision • Employee recognized and adjusted well to changes in work situations and assignments • Solid, good performance was the employee's norm
3.0	Occasionally Exceeds Expectations	• Employee periodically exceeded the job standards • Employee achieved results above expectations • Employee showed exceptional performance and effort from time to time • Performance is sustained and uniformly high with thorough and on time results
4.0	Consistently Exceeds Expectations	• Employee clearly and consistently exceeded the job standards • Exceptional performance and effort was the employee's norm • Employee achieved results well beyond expectations • Employee contributed unique, innovative and workable solutions to projects and/or problems

Close Window

UK Online PE System – Managing the PE Process for Campus Supervisors




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 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.

UK Online PE System – Managing the PE Process for Campus Supervisors

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.

Major Job Responsibilities

In this section employee will self-rate and managers will rate the employee's performance of the MJRs. Updates to the job standards can be made in this section. MJR and Essential Function updates cannot be made here - those updates must be made in the Position Description System.

1.1

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

Job Standard:
SOX compliance rate

Weight: 20.0% **Start:** 01/01/2013 **Due:** 12/31/2013 **Progress:** 100% **Status:** Complete

Rating by Mabeline Manager:
Manager Rating: unrated

Rating by Cal Abbott:
Rating: 2.0 - Meets Expectations

Mabeline Manager's Comments:
[spell check...](#) [legal scan...](#)

Subjects Comments:
Can include additional comments to support self-rating.

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.

Core Competencies

Core competencies are skills, areas of knowledge, or abilities all employees need to be successful at the University of Kentucky. Click on the Writing Assistant link for examples of behaviors exemplifying the core competencies. The manager needs to provide supporting comments for the rating.

Section Summary	Rating
Dependability	unrated
Diversity and Inclusion	unrated
Initiative	unrated
Integrity	unrated
Interpersonal Relationships	unrated

Dependability
Demonstration of consistency in attendance and quality of work.

Rating by Mabeline Manager:
Rating: unrated

Rating by Cal Abbott:
Rating: unrated

Comments by Cal Abbott:
[writing assistant...](#) [spell check...](#) [legal scan...](#)

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.

UK Online PE System – Managing the PE Process for Campus Supervisors

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.

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 sample's 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

Professional Development/Other Goals

1.1 Remove Goal

Professional Development: work harder!

Results/Notes:

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

Comments by Mabeline Manager: [spell check...](#) [legal scan...](#)


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

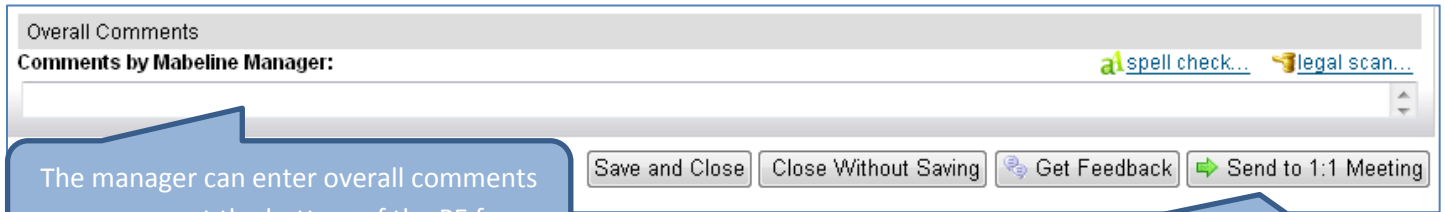
	Rating
<u>Major Job Responsibilities</u>	2.4 / 4.0
Achieve 100% compliance with Sarbanes-O	2.0 - Meets Expectations

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

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.

UK Online PE System – Managing the PE Process for Campus Supervisors

Completing the PE Process - Step Two: Manager Review – continued



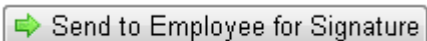
The manager can enter overall comments or summary at the bottom of the PE form.

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 Mabeline Manager:	Rating by Cal Abbott:	
Manager Rating: 2.0 - Meets Expectations	Rating: 2.0 - Meets Expectations	
Mabeline Manager's Comments:	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.
<input checked="" type="checkbox"/> Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
<input checked="" type="checkbox"/> Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
<input type="checkbox"/> Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
<input checked="" type="checkbox"/> Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
<input type="checkbox"/> Sampling Statistics - Supervisor evaluates the employee's performance in part based on sample's of the employee's work or statistical data that indicates the employee's level of work of demonstrated competence
<input checked="" type="checkbox"/> 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
<input type="checkbox"/> 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
Rating
Major Job Responsibilities
2.4 / 4.0
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)
2.0 - Meets Expectations

UK Online PE System – Managing the PE Process for Campus Supervisors

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

Overall Comments
Comments by Mabeline Manager:
Add summary of employee's performance.

Signature

The electronic signature belows represent your acknowledgement of this form.

Employee: _____
Cal Abbott

Manager: _____
Mabeline Manager

Section Comments:
Comments by Cal Abbott:

[spell check...](#) [legal scan...](#)

Save and Close Close Without Saving **Sign** Mabeline Manager

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

Overall Comments
Comments by Mabeline Manager:
Add summary of employee's performance.

Signature

The electronic signature belows represent your acknowledgement of this form.

Employee: Cal Abbott 11/27/2013
Cal Abbott

Manager: _____
Mabeline Manager

Section Comments:
Comments by Cal Abbott:
Employee can now add additional comments.

Comments by Mabeline Manager:

Save and Close Close Without Saving Cal Abbott **Sign**

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.

UK Online PE System – Managing the PE Process for Campus Supervisors

Viewing Completed PE Forms and Completion Status

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

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

My Forms

All Forms | In Progress | **Completed** | Create New Folder | Un-Filed | Form Status

Items per page: 10 | Showing 1–7 of 7

Create New Folder | Move to Folder: Select Folder | Move

Display Options

Form Title Employee Form Start Date Form End Date Form Due Date Completed On

Form Title	Employee	Form Start Date	Form End Date
★2013 University Performance Evaluation for Cal Abbott	Cal Abbott	01/01/2013	12/31/2013

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

My Forms

All Forms | In Progress | Completed | **Form Status** | Aggregate | Individual

- Form Status** section: **Aggregate** view

2013 University Performance Evaluation							
	Due Date						
Employee	People	# of Forms	Employee Self Evaluation	Manager Review	1:1 Meeting	Employee Signature	Manager Signature
Frank Manager	1	1	0% <div style="width: 0px; height: 10px; background-color: red;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>
Calloway Dixon	1	1	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>
Calmon Ebert	1	1	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>	0% <div style="width: 0px; height: 10px; background-color: red;"></div>
Calamity Forrest	1	1	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>
Calfred Gardner	1	1	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>
Direct Reports	4	4	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	75% <div style="width: 75%; height: 10px; background-color: yellow;"></div>	75% <div style="width: 75%; height: 10px; background-color: yellow;"></div>
Team Total	4	4	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	100% <div style="width: 100%; height: 10px; background-color: green;"></div>	75% <div style="width: 75%; height: 10px; background-color: yellow;"></div>	75% <div style="width: 75%; height: 10px; background-color: yellow;"></div>

- Form Status** section: **Individual** view

2013 University Performance Evaluation							
Employee	Employee Self Evaluation	Manager Review	1:1 Meeting	Employee Signature	Manager Signature	Due	Other
	Employee	Manager	Manager	Employee	Manager		
Frank Manager	⚠					08/01/2013	N/A
Calloway Dixon	✓	✓	✓	✓	✓	07/18/2013	N/A
Calmon Ebert	✓	✓	✓	📄		08/01/2013	N/A
Calamity Forrest	✓	✓	✓	✓	✓	07/18/2013	N/A
Calfred Gardner	✓	✓	✓	✓	✓	07/18/2013	N/A

Legend: ✓ Completed 📄 Completed Form ⚠ Requires Your Attention 📄 Enroute

HR Training & Development
As of 11/01/2014

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