

Annual Review (for Employees)

How Does Your Annual Review Work?

You and your manager will use the online forms contained in SuccessFactors to conduct your annual review. In this guide, learn how to complete and submit the form.

Getting Started

Your annual review performance form will be available in your inbox following your mid-year checkpoint meeting; you can use this form to track notes on your performance all the way up to your annual review meeting. You will receive an email when it's time to begin the annual review process.

To access your **Annual Review Performance Form**, follow these steps:

- Click **Home** in the upper left corner of the screen.
- Click **Performance Forms** from the drop down menu.
- Click the link to your **Performance Form** from the list of forms. It will begin with FY##, with ## representing the fiscal year being reviewed.

Completing an Annual Review Performance Form


The top of the performance form displays which review is currently pending – either mid-year or annual review. The form works the same for either, but you should be aware of which review you are working on. This guide is intended to be used for your annual review at the end of the performance period. There is a separate guide for mid-year reviews.

The top of the performance form shows your employee information, which is populated automatically from SAP. If you see any errors, contact your manager to have them corrected.

To complete the form, you will rate yourself and provide comments on your performance during the rating period in three primary areas:

- **Goals:** The priority outcomes or results that you and your manager agreed that you would accomplish. These will be transferred to the review directly from your Goal Plan in SuccessFactors.

If your Goal Plan was not completed or did not add up to 100%, you will have one final opportunity to edit it in the annual review form. You can do

this by clicking the Edit Goal button () at the top right of any goal. Any changes you make here will be audited in the system for your manager to see.

Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
★ FY14 - JHM Performance Form (5) for James M Dickinson	James M Dickinson	Annual Review	06/16/2014	06/30/2014	07/01/2013	06/30/2014	06/30/2014	06/19/2014	James M Dickinson	

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FY14 - JHM Performance Form (5) for James M Dickinson

Due: 12/31/2013 06/30/2014

Mid-Year Complete Annual Review Signature Completed

[Send To Maura E Walden](#)

Employee Information	Employee Information
Review Information	First Name: James
Introduction	Last Name: Dickinson
Goals	Position Title: ORG DEVELOPMENT & TRAINING CONSULTANT
Major Responsibilities (Essential Job Functions)	JHU Org Unit/JHHS DSM Code: 30200860
Professional Development	Manager: Maura E Walden
Core Values	Organizational Unit: 10001755-Corporate Training Community Relations
Mid Year Review Overall Comments	Personnel Area: Johns Hopkins Health Care
Annual Review Overall Comments	Position Begin Date: 10/15/2012
	Review Information
	Originator: JHHS SuccessFactors Test System (Admin_JHHS)
	Review Period: 07/01/2013 - 06/30/2014
	Due Date: 06/30/2014
	Introduction

If you did not enter any goals or need to add another one, you will need to close and save the performance form and return to your goal plan. You can access your goal plan by selecting **Home** in the upper left corner and then **Goals**. These goals must add up to 100%. Once goals have been entered you may return to your performance form.

- **Major Responsibilities (Essential Job Functions):** The ongoing job requirements and duties that are included in your job description.
- **Core Values:** Behavioral standards expected of every Johns Hopkins Medicine employee.

Your **Overall Rating** will be based on the degree to which you accomplished your goals and major responsibilities while demonstrating our Core Values. You will not be evaluated based on your professional development goals.

Entering Ratings and Comments

Scroll down the form and enter a self-rating for each Goal, Major Responsibility, and Core Value.

To enter your ratings and comments:

- **Employee Rating:** Click the drop down menu next to Employee Rating and select the rating that you believe applies. You may also click the text "[Employee Rating](#)" to see a detailed definition for each level of performance.
- **Comments:** Whenever you see a comments area, you may add descriptive details about what you have accomplished. Comments are required for every goal in your Goal Plan and optional in other areas of the review. Type in the box to add comments that support your rating.

Complete this process for all sections of the review.

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FY14 - JHM Performance Form (5) for James M Dickinson

Due: 12/31/2013 → 06/30/2014
 Mid-Year Complete → Annual Review → Signature → Completed
[Send To Maura E Walden](#)

Employee Information
 Review Information
 Introduction
 Goals
 Major Responsibilities (Essential Job Functions)
 Professional Development
 Core Values
 Mid Year Review Overall Comments
 Annual Review Overall Comments

3.1 Achieve a customer satisfaction rating of at least 90 percentile for services provided during the second quarter [less detail](#) | [more detail](#)

Category: Patient and Family-Centered Care
 Goal Name : Achieve a customer satisfaction rating of at least 90 percentile for services provided during the second quarter
 Goal Description : Satisfaction survey score

Start Date : 07/01/2013
 Due Date : 06/30/2014
 Weight : 50.0%
 % Complete : 100.0%
 Status : **Complete**

Rating by James M Dickinson:
 Employee Rating: Select One...
 James M Dickinson: Select One...
 1.0 - Unsatisfactory
 2.0 - Needs Improvement
3.0 - Meets Expectations
 4.0 - Exceeds Expectations
 5.0 - Highly Exceeds Expectations

Maura E Walden's Comments:
 No comments

JHM 5 Point Scale

Scale Value	Description	Detailed Information
1.0	Unsatisfactory	Performance must improve significantly within a reasonable period of time if the individual is to remain in this position. Employee is not performing to the requirements of the job.
2.0	Needs Improvement	Performance is noticeably less than expected. Usually performs to and meets job requirements, however the need for further development and improvement is clearly recognized.
3.0	Meets Expectations	Performance clearly and fully meets all the requirements of the position in terms of quality and quantity of work. It is described as good, solid performance. Minor deviations may occur, the overall level of performance meets or slightly exceeds all position requirements.
4.0	Exceeds Expectations	Performance frequently exceeds job requirements. Accomplishments are regularly above expected levels. Performance is sustained and uniformly high with thorough and on time results.
5.0	Highly Exceeds Expectations	Performance levels and accomplishments far exceed normal expectations. This category is reserved for the employee who truly stands out and clearly and consistently demonstrates exceptional accomplishments in terms of quality and quantity of work that is easily recognized as truly exceptional by others.

[Close Window](#)

Rating by James M Dickinson:
[Employee Rating:](#) 3.0 - Meets Expectations

James M Dickinson's Comments:

I was able to meet this target for all weeks of the second quarter.

Submitting Your Performance Form

When you reach the bottom of the form, you may enter **Overall Comments** on your performance. Then, you have three options:

- **Save and Close** the form so that you can review or revise it later.
- **Close without Saving** if you want to start again later. **You will lose any edits you have made.**
- **Send** the form to your manager, so he/she can complete an evaluation of your performance. **Your self-evaluation is not complete until you have clicked this button and confirm that you would like to Send the form on the next page.**

After you have sent the form to your manager, he or she will complete an evaluation of your performance while being able to see your self-ratings and comments.

Holding Your Annual Review Meeting

Once your manager has completed a review for you in the system, he or she will schedule an Annual Performance Review meeting with you to go over your progress from the previous year and share your final ratings with you.

Signature

After your Annual Performance Review meeting, your manager will route the Performance Form back to your Performance Forms inbox. You will now be able to review all of your manager's ratings and comments on your own and add any final comments you may have.

Once you have entered your comments, there are four options:

- **Save and Close** the form so that you can review or revise it later.
- **Close without Saving** if you want to start again later. **You will lose any edits you have made.**
- **Return to Evaluation** if you believe something is inaccurate and would like to return to the evaluation stage. This will route the form back to your manager.
- **Add Electronic Signature** to sign the form and complete the evaluation process. **Please note that your annual review is not complete until you add your signature by clicking this button and verifying the choice on the next screen. Your signature does not imply agreement or disagreement with your final rating.**

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FY14 - JHU Performance Form (4) for Edward Employee

Mid-Year Complete Annual Review Complete Final Review 1:1 Meeting Complete **Signature** Completed

Employee Information	Goal 1: Provide administrative support to assigned faculty and staff	4.0 - Top Performer	60.0%
Review Information	Goal 2: Order and maintain supplies and equipment	4.0 - Top Performer	40.0%
Introduction	Core Values/Competencies	3.6 / 4.0	30.0%
Goals and Major Responsibilities	Core Value: Equity, civility, and respect	3.0 - Above Average Performer	
Professional Development	Core Value: Innovation and problem solving	3.0 - Above Average Performer	
Core Values/Competencies	Core Value: Managing change	4.0 - Top Performer	
Checkpoint: Pending Completion	Core Value: Mission/service excellence	4.0 - Top Performer	
Mid-Year Check Point Overall Comments	Core Value: Relationships and learning	4.0 - Top Performer	
Annual Review Overall Comments			
Overall Performance Summary			
Signature Section			

Signature Section
 Signature of this form by the employee acknowledges that an Annual Review meeting has taken place. Signature does not indicate that the employee is in agreement with all manager comments or ratings.

Employee: _____
 Edward Employee

Manager: _____
 Maggie Manager

Section Comments:
Managers Comments:
 No comments

Edward Employee's Comments:
 I agree with my managers ratings and comments.

After the form is signed, the annual review process is complete and the performance form is no longer accessible in your inbox.

Reviewing Completed Forms

If you would like to review any of your performance forms following submission, locate them by following this path:

- Click **Home** in the upper left corner of the screen.
- Click **Performance Forms** from the drop down menu.
- Click **Completed** to view a list of all previous forms that have been completed.
- Click the link to the Performance Form that you would like to review.

At this point, you cannot edit the ratings or comments in the form, but you can review the details.