2024

NORTHSIDE HOSPITAL

SuccessFactors Performance Management Training Document

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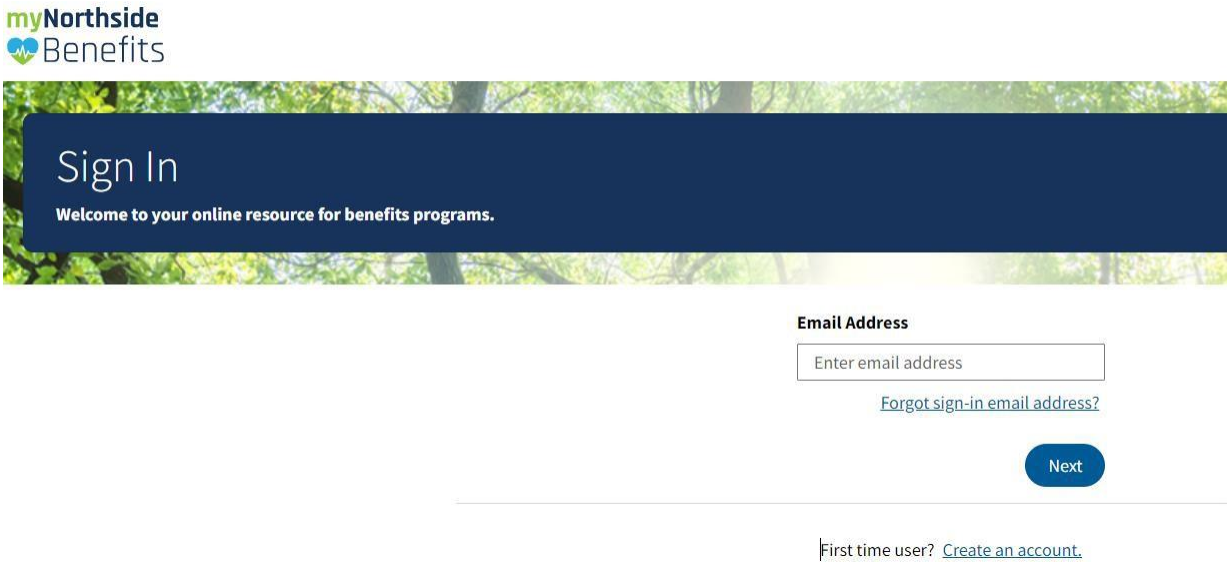
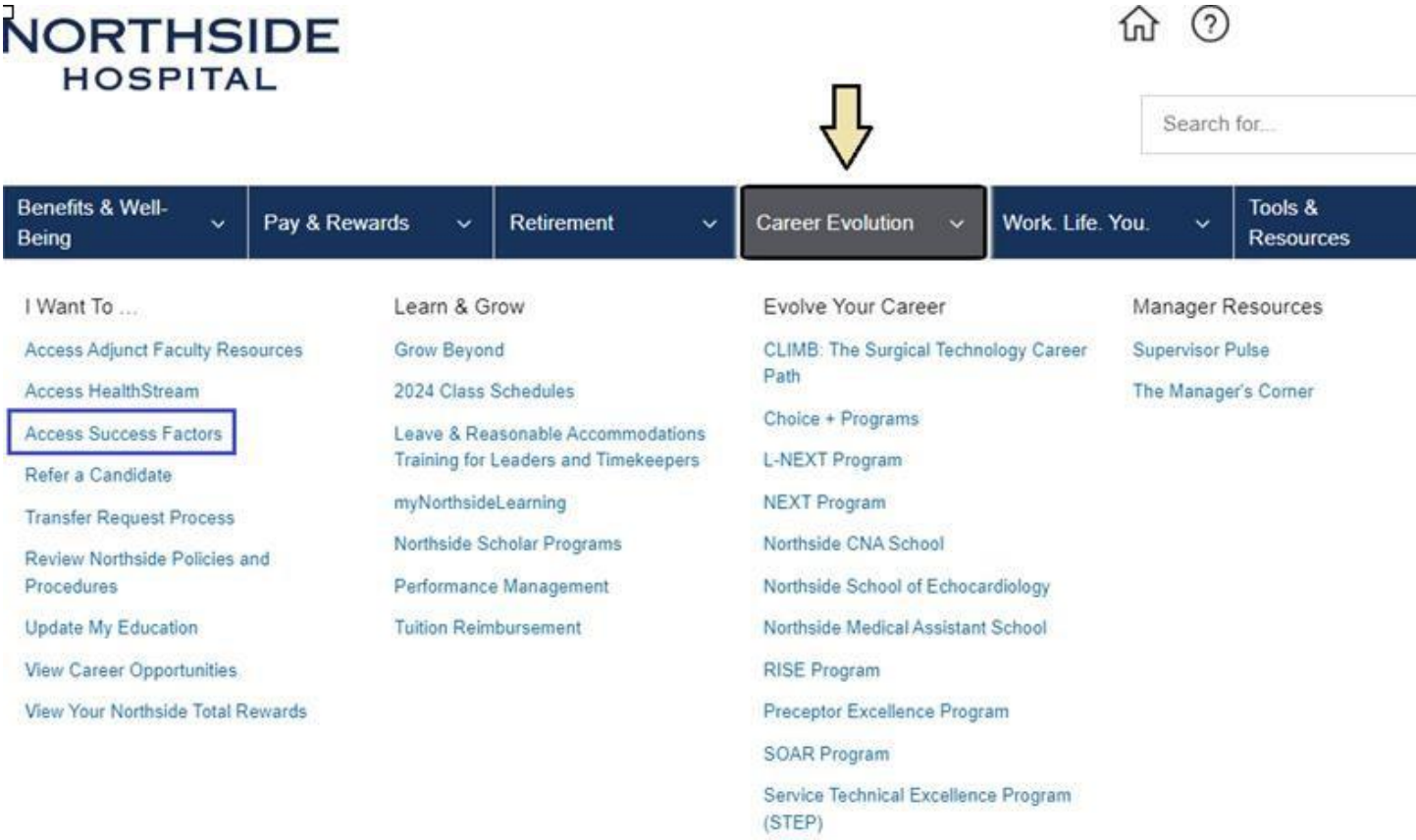
Logging In:

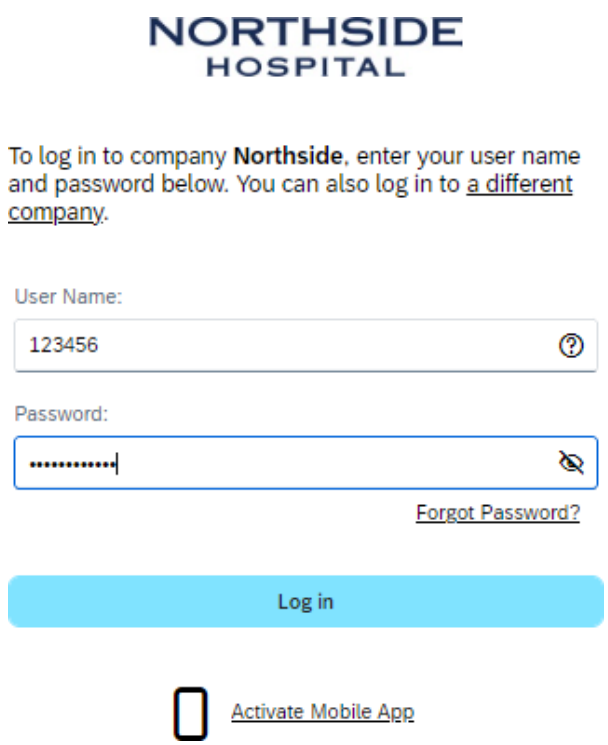
1. Log in to your MyNorthsideHR account



2. Navigate to **Career Evolution > I Want To… Access SuccessFactors**



3. Log in to SuccessFactors using your login credentials



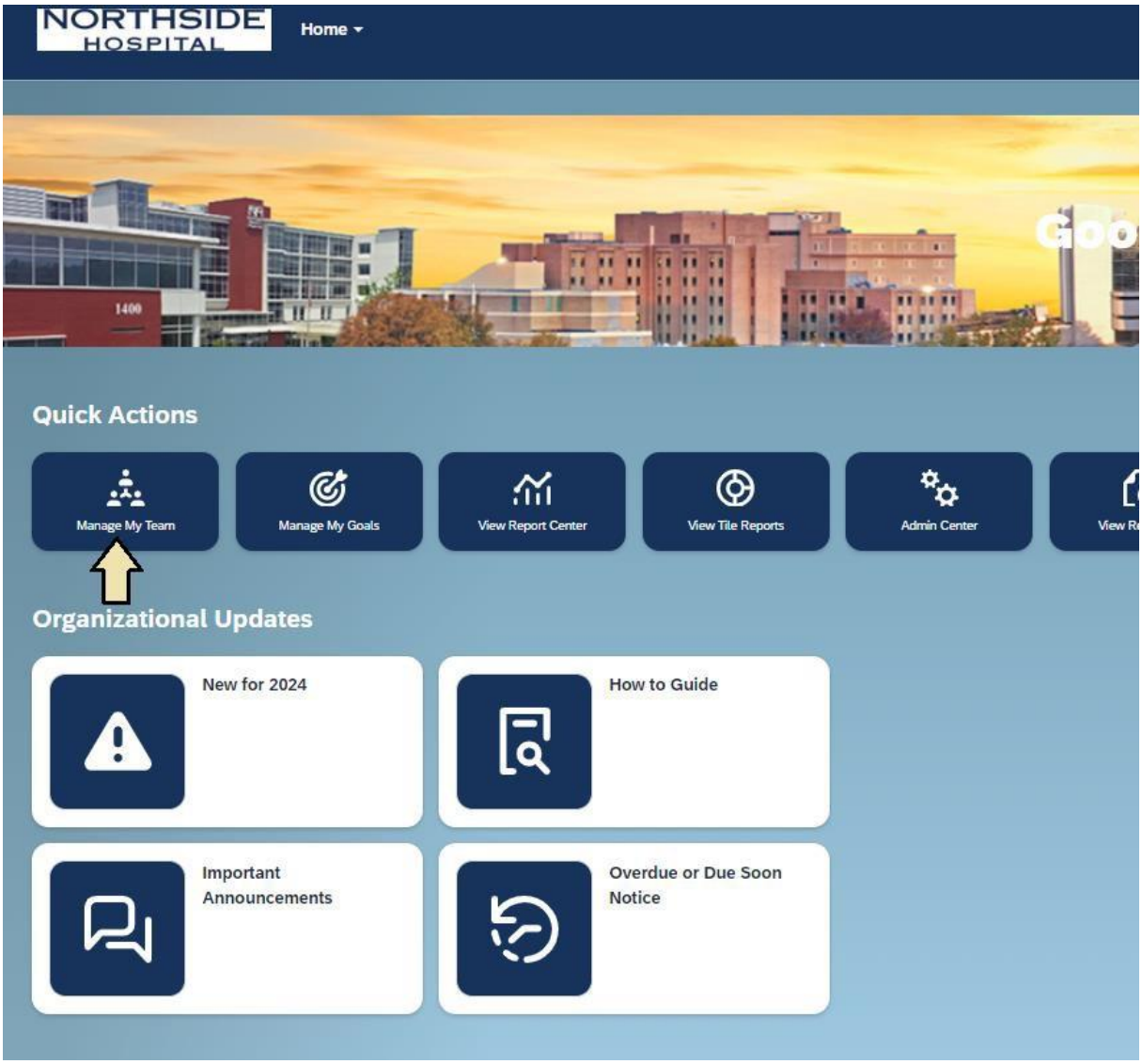
****How do I receive access to SuccessFactors?****

1. **If you currently have direct reports set up**, your account is ready to use.
    a. When you login for the first time, click the "**?**" in the password field to set up your password.
    b. Your **username** is your **employee number** (with leading zeros, if applicable)
    c. You will receive an email with instructions to reset your password.
    d. If you do not receive a password reset email, you most likely do not have direct reports set up. Please open a ticket through AskHR to inquire about your direct reports.

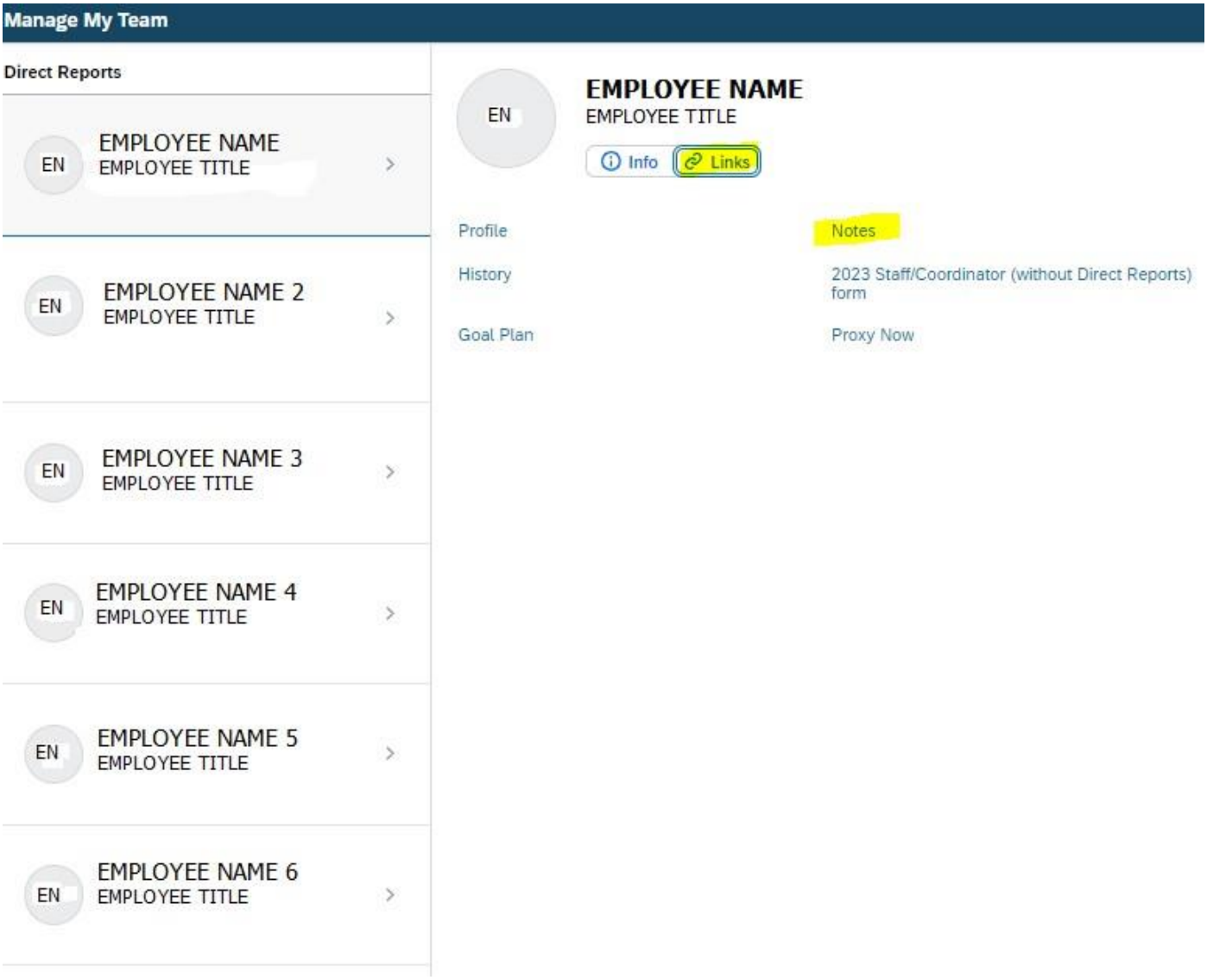
2. **If you do not have direct reports set up**, complete the Supervisor Change Form and email it to HR.Forms@Northside.com
    a. Please allow 1 to 2 weeks for processing.
    b. After your form is processed, you will login using the steps above.
    c. If you have submitted the form for direct reports and still cannot login, please call the Help Desk at **404-851-8883**.

Adding Notes to An Employee's Profile:

1. From the Home Page of Success Factors, click **"Manage My Team"**

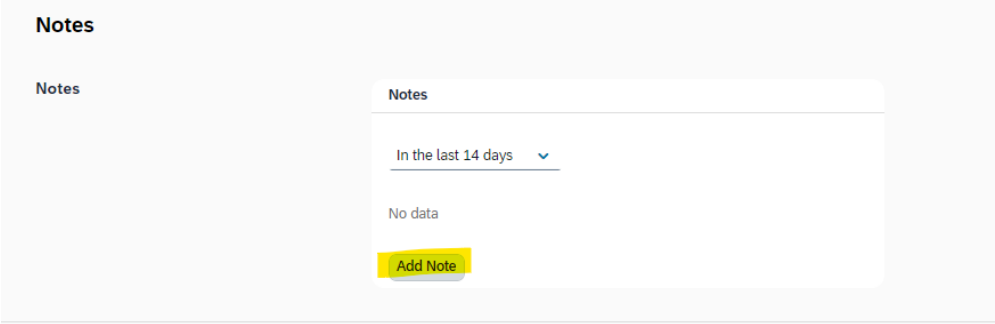


2. Select the employee that you want to add notes for, click **"Links"** and select **"Notes"** from the options.



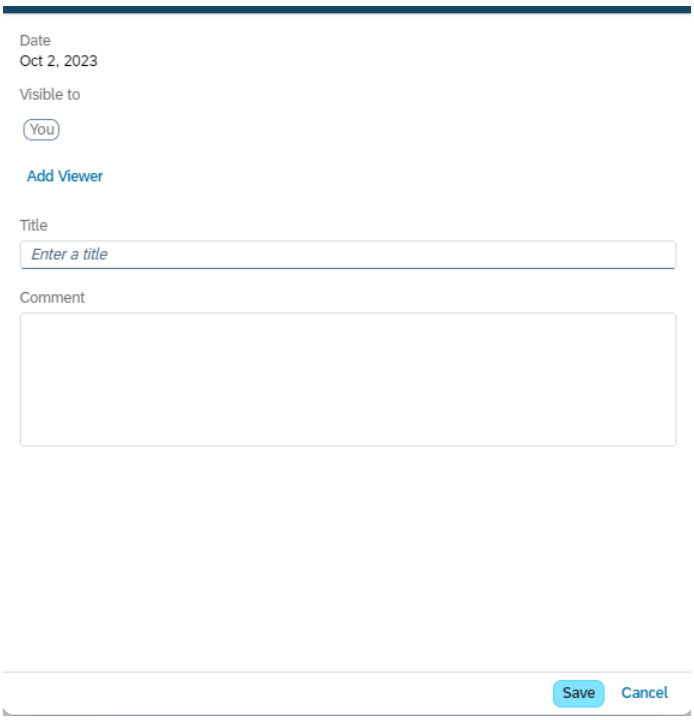
You are now at the **Notes** page for this employee.

3. Click on **"Add Note"**

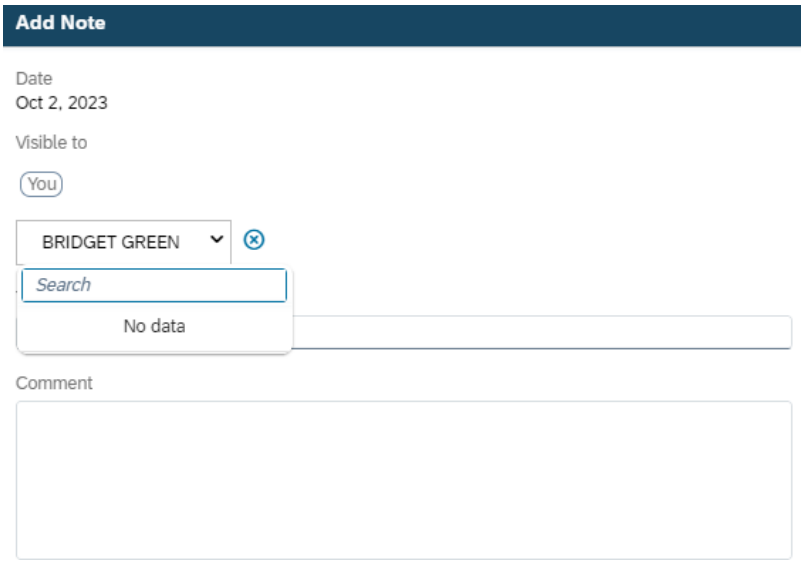


a. Add Viewer Option

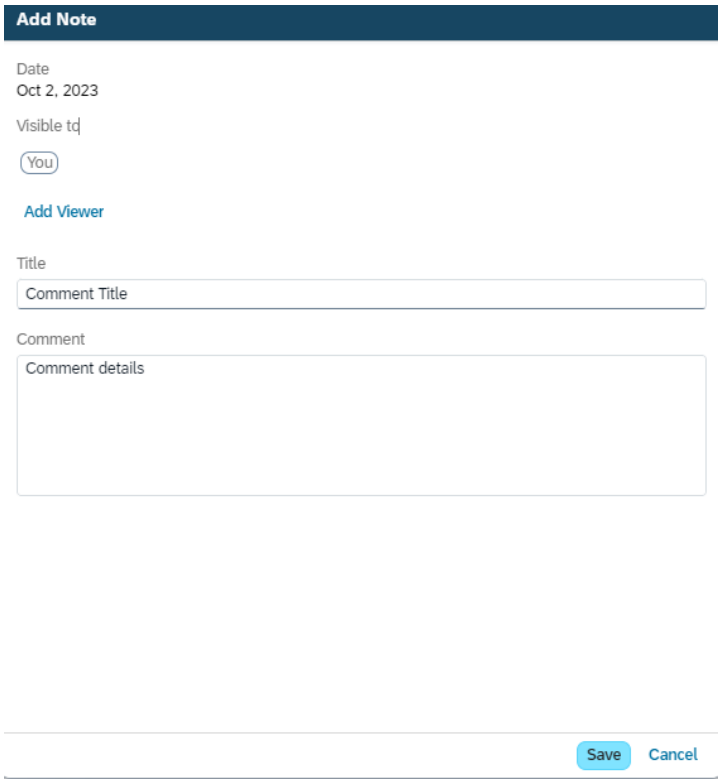
i. To add additional viewers to the note being added, select "**add viewer**"



ii. In the drop down box, type out the name of the person you are looking for, then select them from the drop down menu.

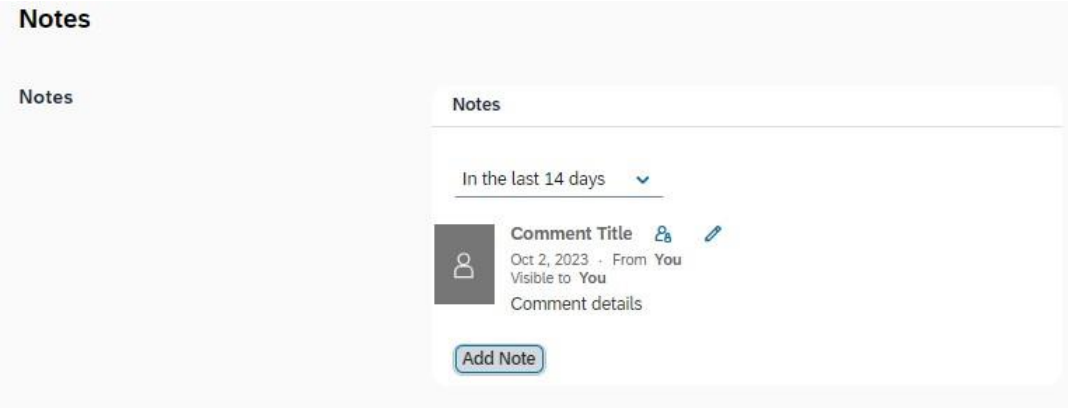


4. Add a ***comment title*** and any details you wish to record in the ***comment details*** section.
5. When you're finished, click "**save**"



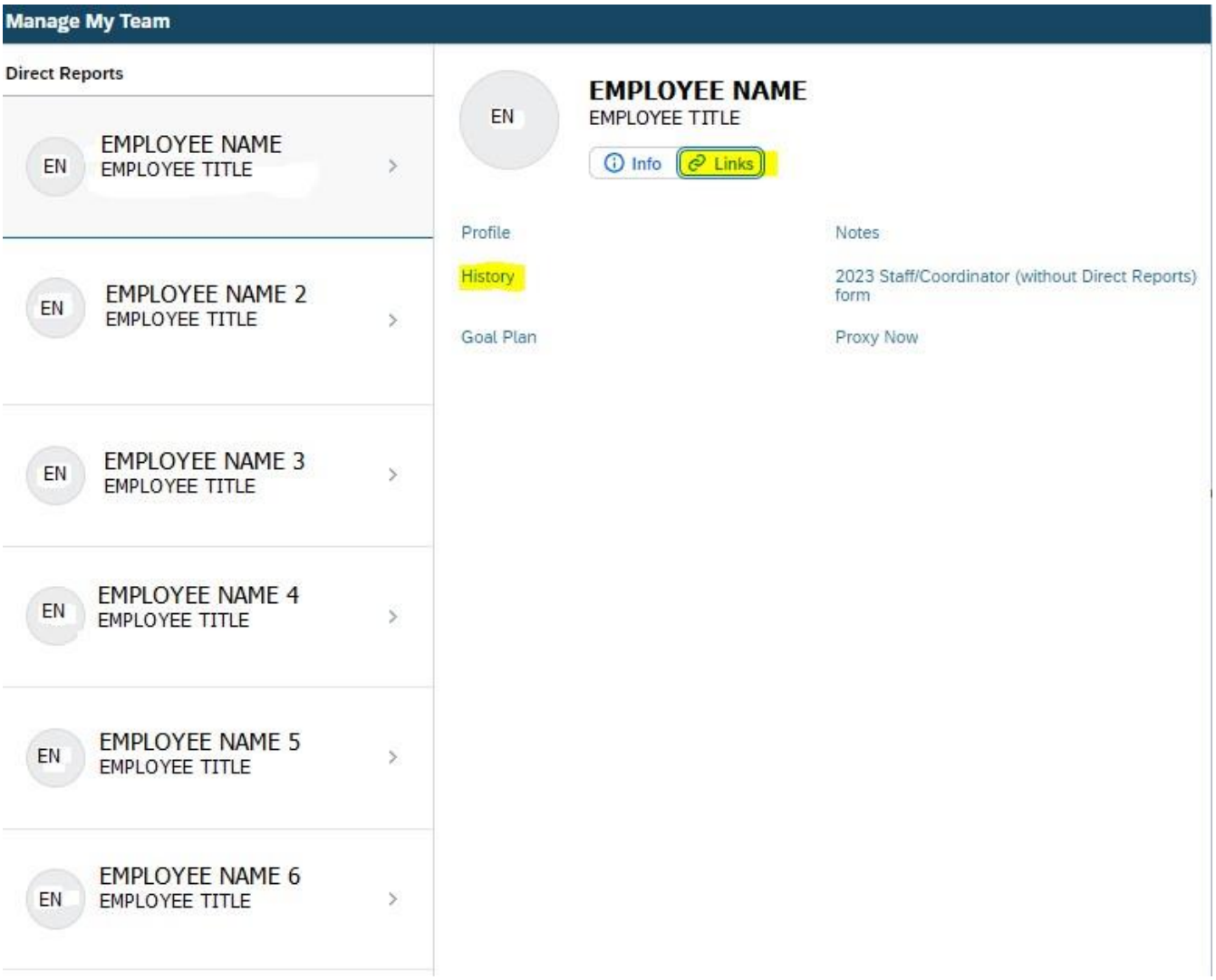
Additional Information:

***If you wish to add additional notes, repeat the process from the beginning.**
***If you wish to delete or edit a note, you can do so by using the pencil icon next to the note you wish to edit.**

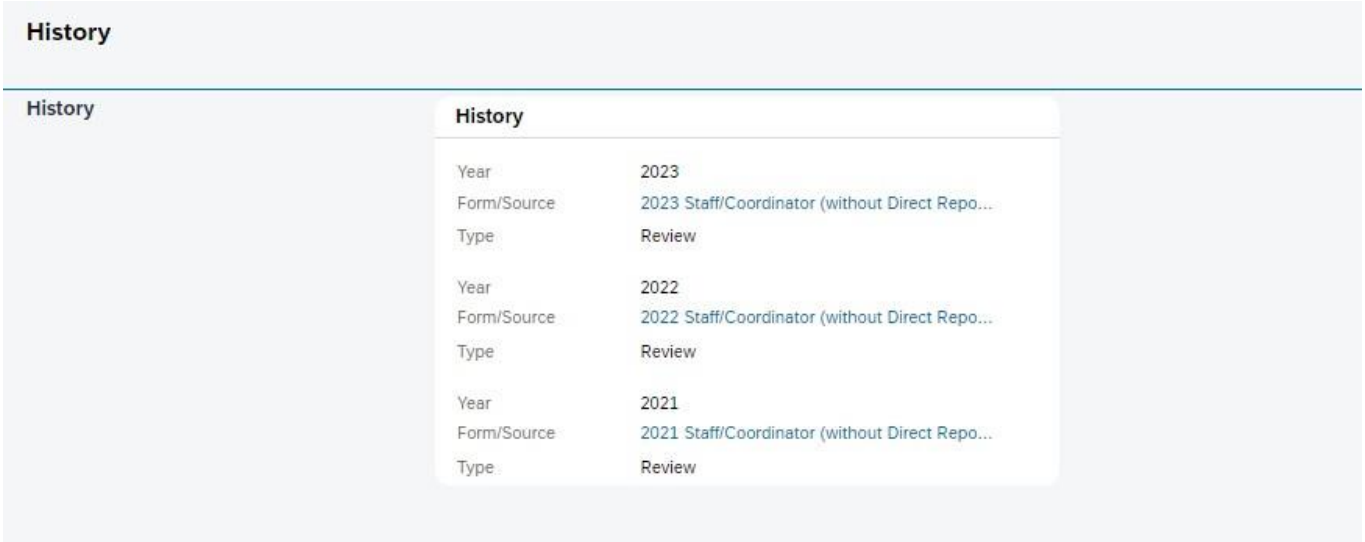


Reviewing an Employee's Performance Evaluation History:

1. From the Home Page of Success Factors, click "**Manage My Team**"
2. Select the Employee that you want to view history for, click "**Links**" and select "**History**" from the options.



You are now at the **History** page for the selected employee.



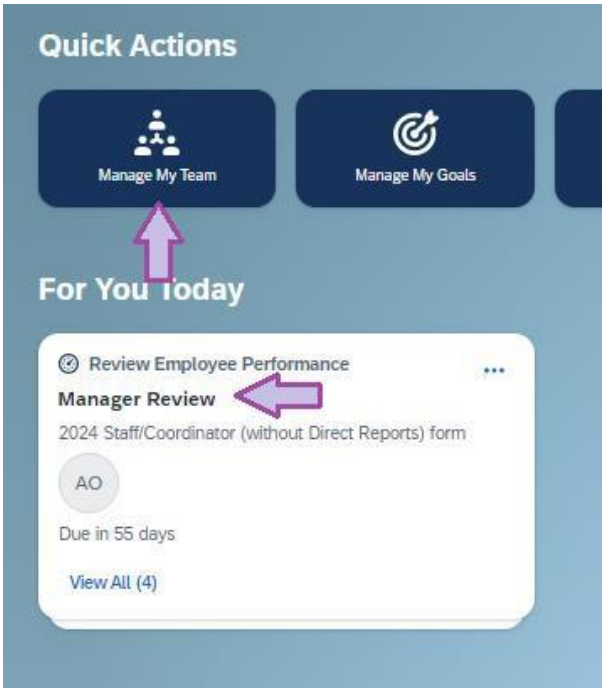
***All available history will be listed as a line item with a blue hyperlink.**
***Select the hyperlink for the year you wish to view and the associated evaluation will appear.**

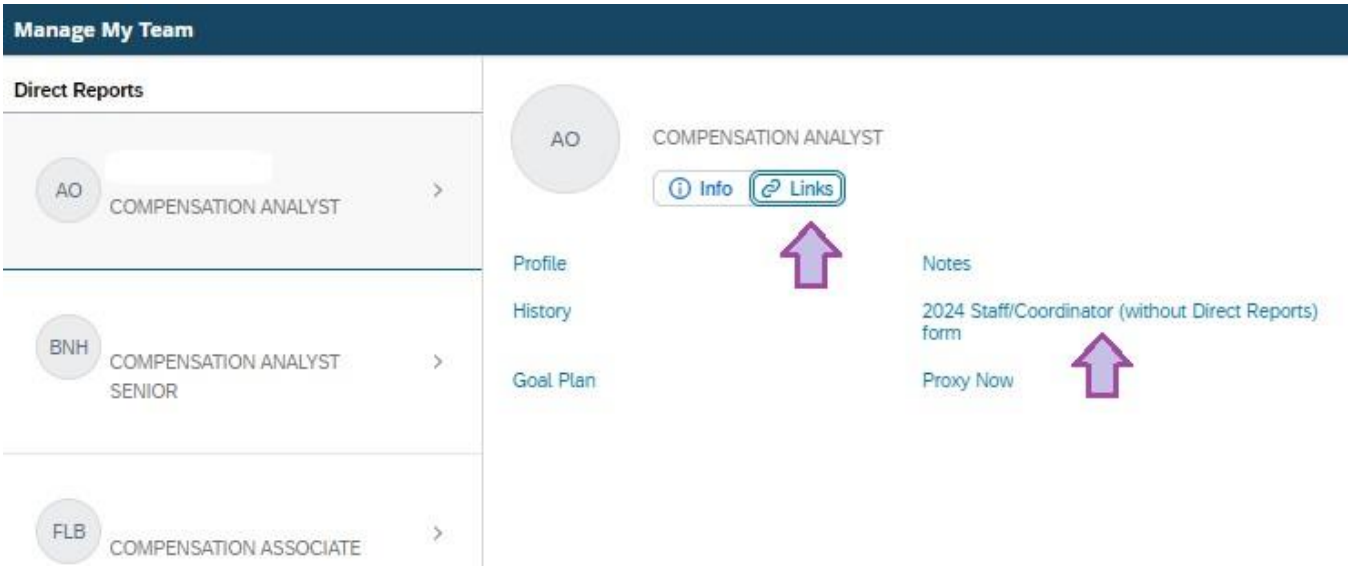
Using Get Feedback

As the current supervisor, you must first setup the employee's current year goal plan and add the goals prior to sending the Performance Form to the other supervisor for completion

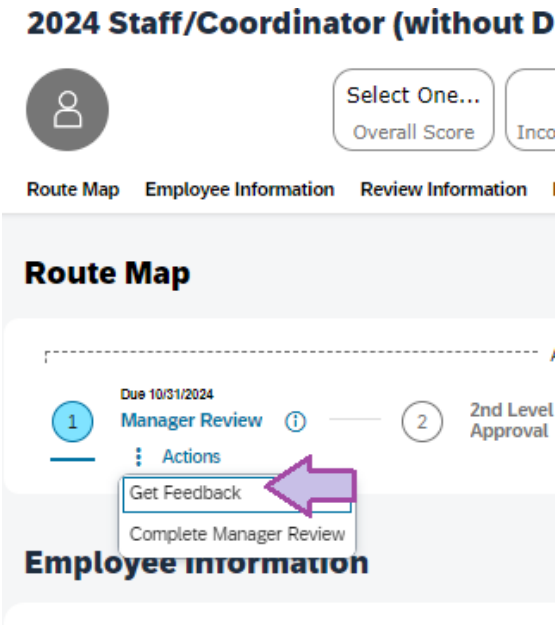
To get the feedback of another leader, you can utilize the Get Feedback feature.

1. From your homepage, navigate to the Performance Evaluation form for the employee that you wish to receive feedback for.
    a. You can do this by either clicking "Manager Review" on the associated form in the "sticky notes" under "For You Today"
    OR
    b. you can navigate through Manage My Team > Select Employee > Links > Click the current year form

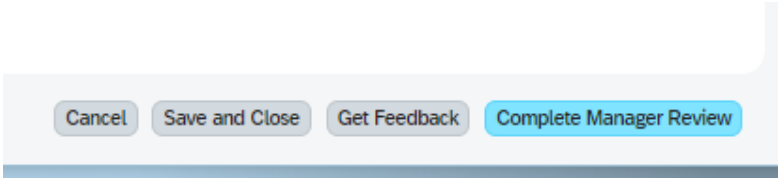




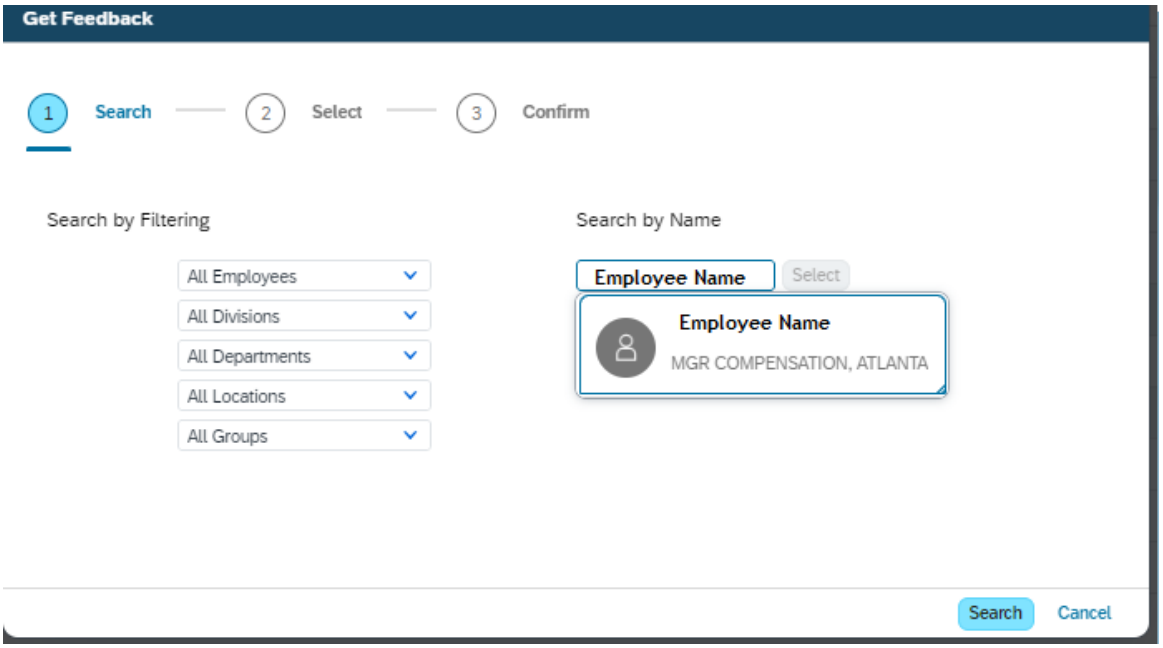
2. Click the “Get Feedback” button under the Actions dropdown on the Performance Review.



   a. You can also access it from the bottom, right corner of the form



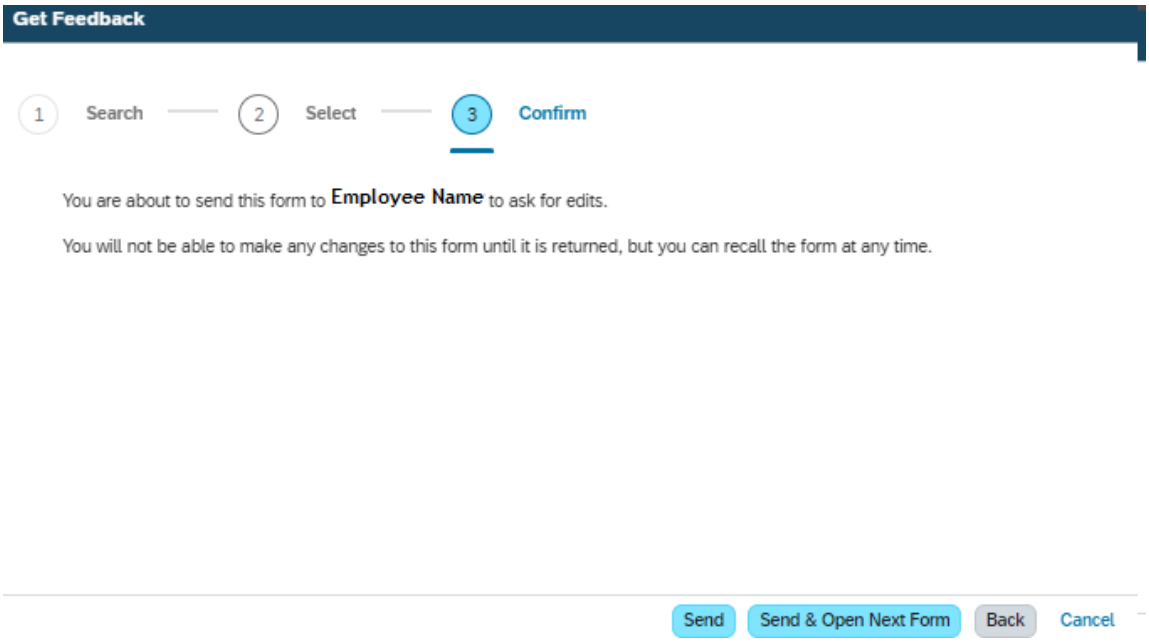
3. Search for the leader you want to request feedback from by searching for their name in the “Search by Name” box.
   a. Type the name of the person you are looking for into the box, select the employee from the drop down, and click “select”



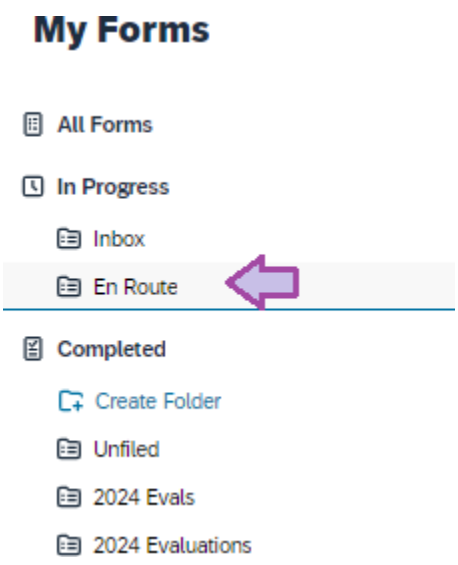
Do not click the search button – that will take you to another search functionality

You will arrive at the following Summary Page.

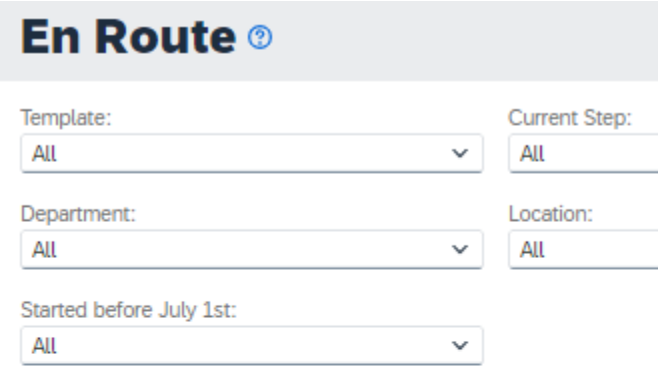
4. Click “Send” to complete the action.

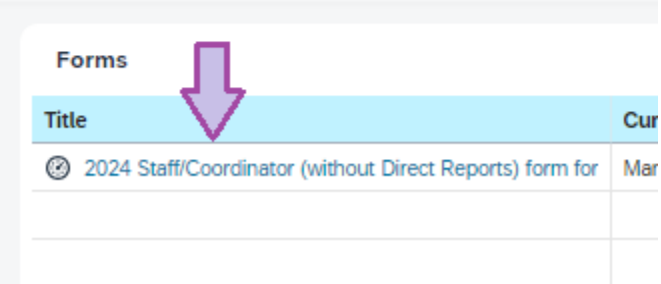


After you send the form to the participant, you can find the form in your En Route folder.

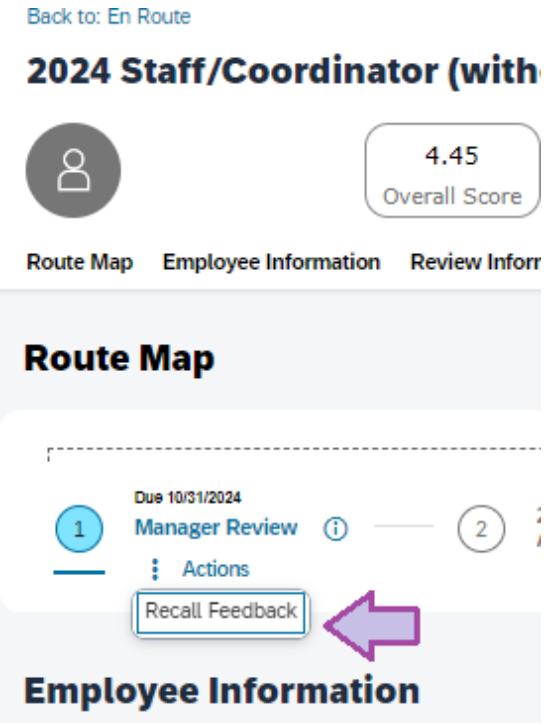


If you need to pull the form back, you can click the blue hyperlink for the form to go to the Performance Evaluation page.





Under the actions button, click “Recall Feedback”

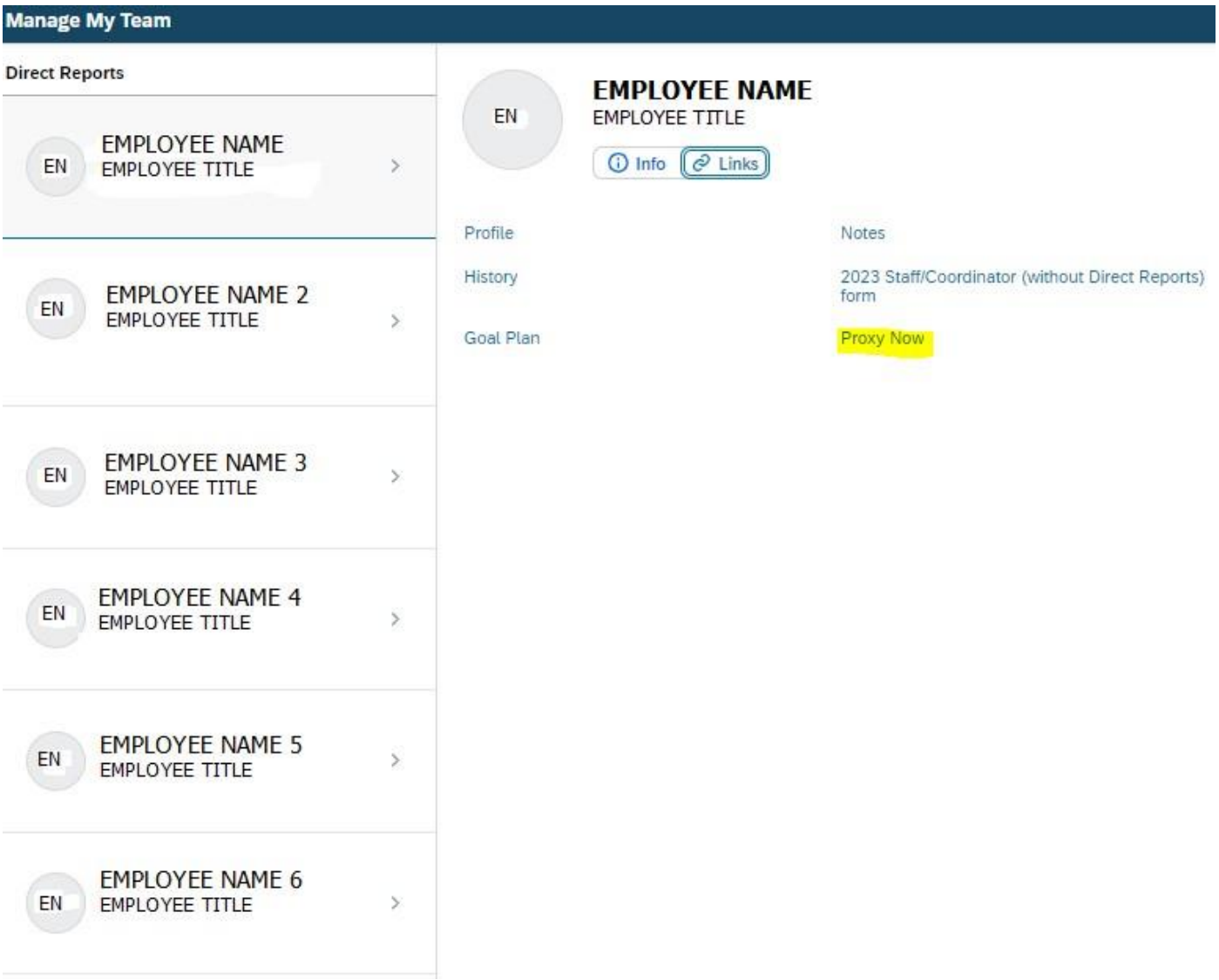


Cascading Goals for Direct Reports

** Before you can use the cascade function, you must have added Job Performance Standards to at least one employee's goal plan in the current fiscal year **

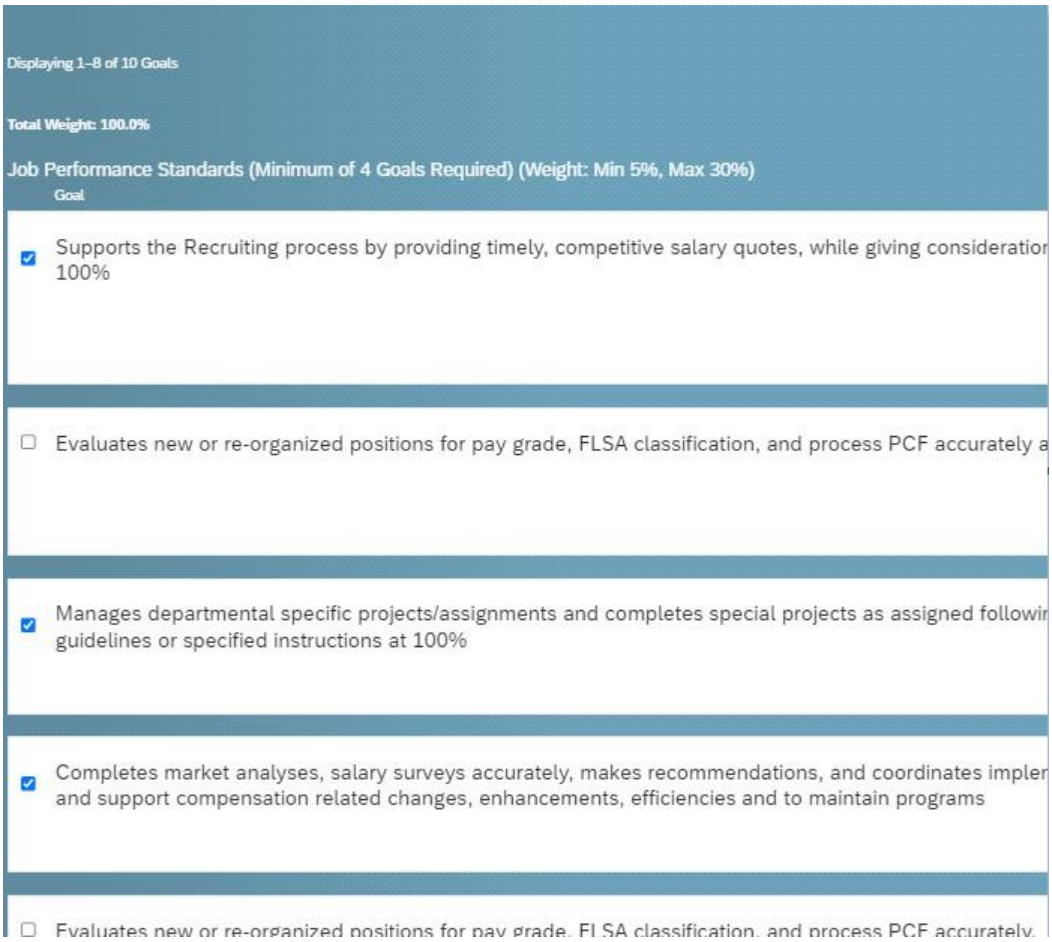
** You cannot cascade from prior years **

1. From the Home Page of Success Factors, click "**Manage My Team**"
2. Select the Employee whose Goal Plan contains the goals that you wish to cascade to other direct reports.
3. Click "**Go To**" and select "**Proxy Now**" from the options.

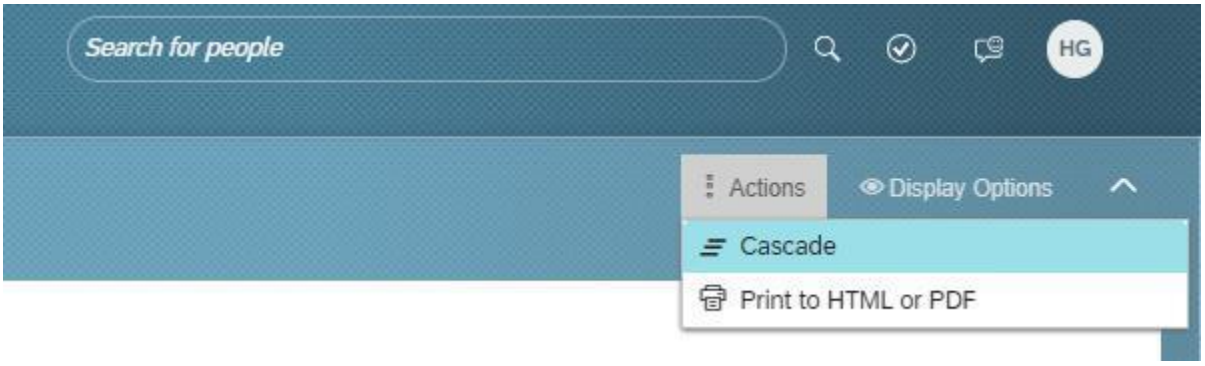


4. You will land on the employee's goals page

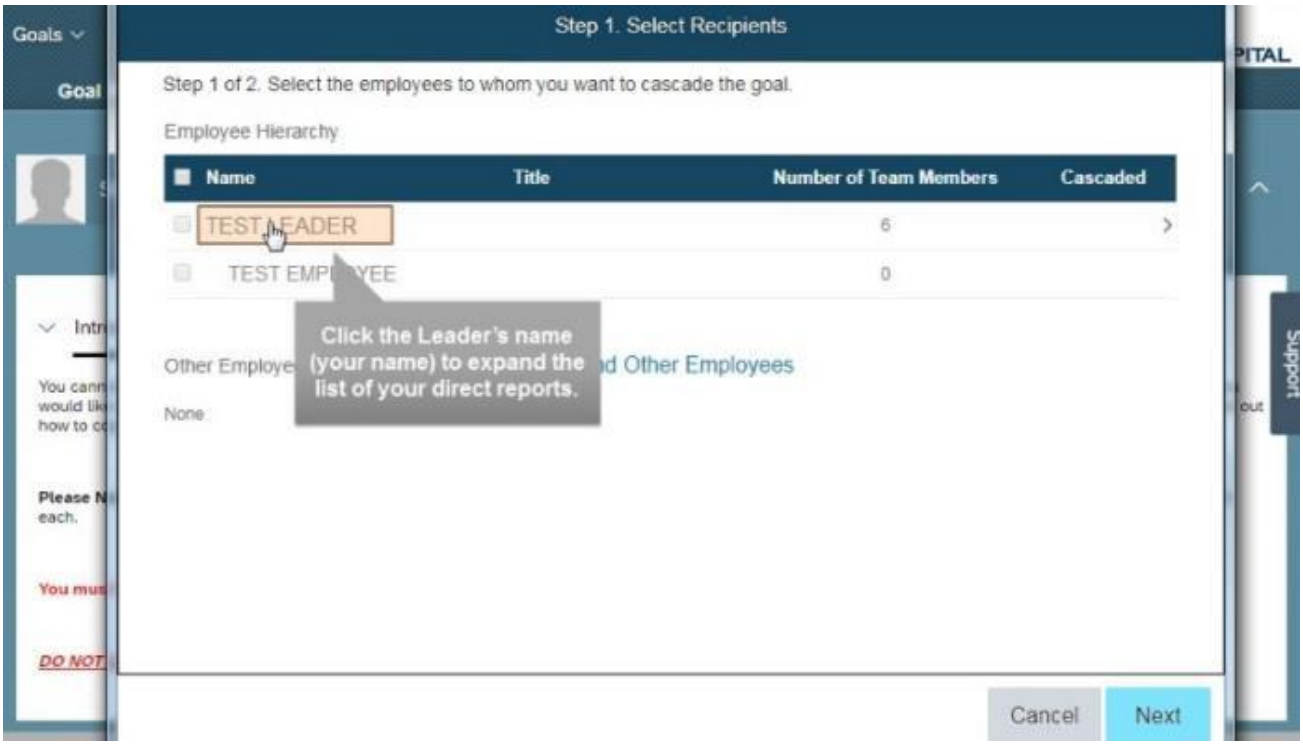
5. Select the square boxes (turning them blue with a white check mark in them) that you wish to be included in the cascade.



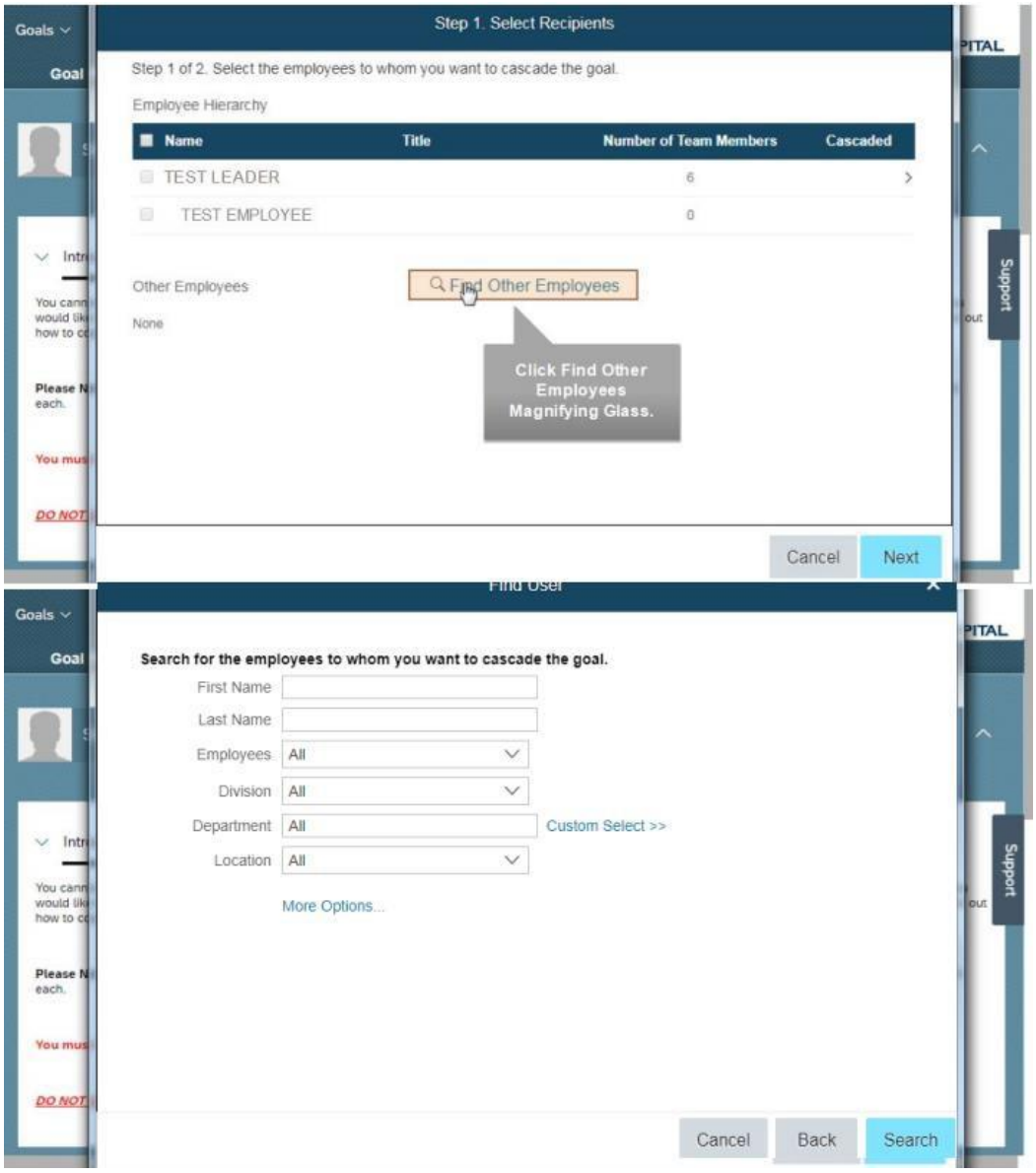
6. When you've selected all the goals you wish to cascade, click **"Actions"** in the top right hand corner and select **"Cascade"** from the drop down.



7. A pop-up window will appear asking you to select the employee or employees you want to cascade the goal(s) to. Not all of your direct reports are visible. Click the leader's name (your name) to expand your list of direct reports.

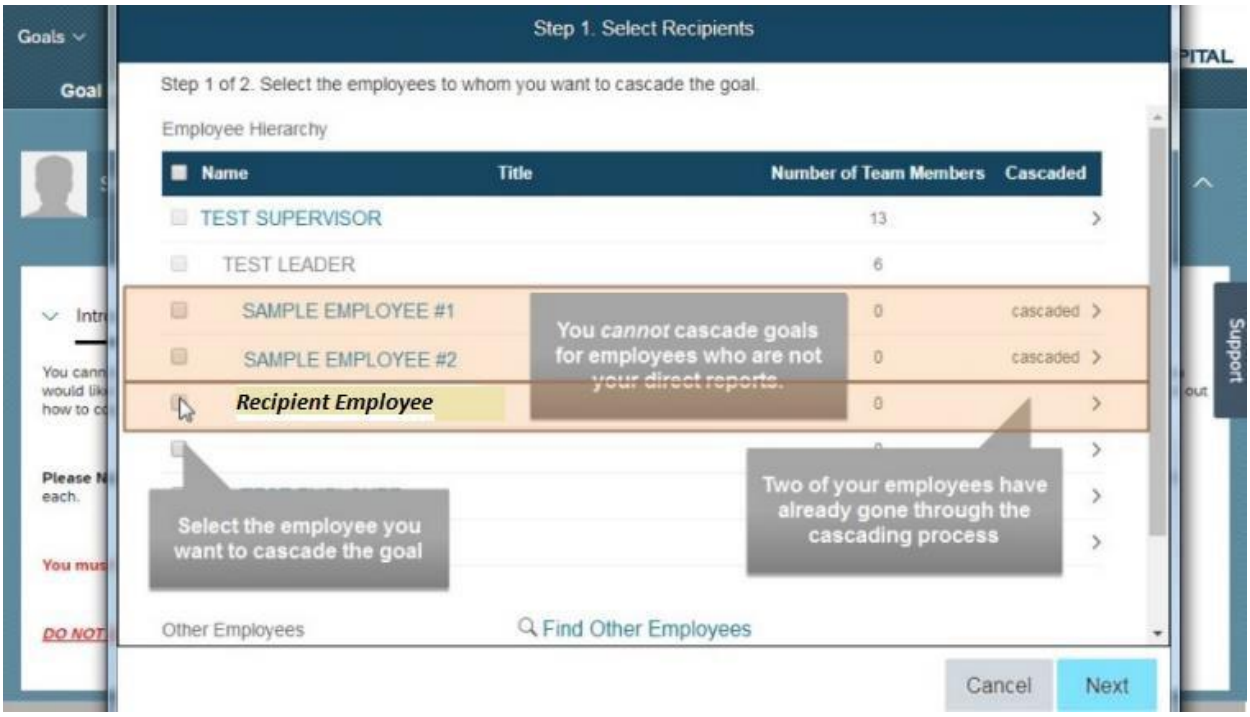


a. You also have the option of finding your direct reports by clicking the "Find Other Employees" magnifying glass.

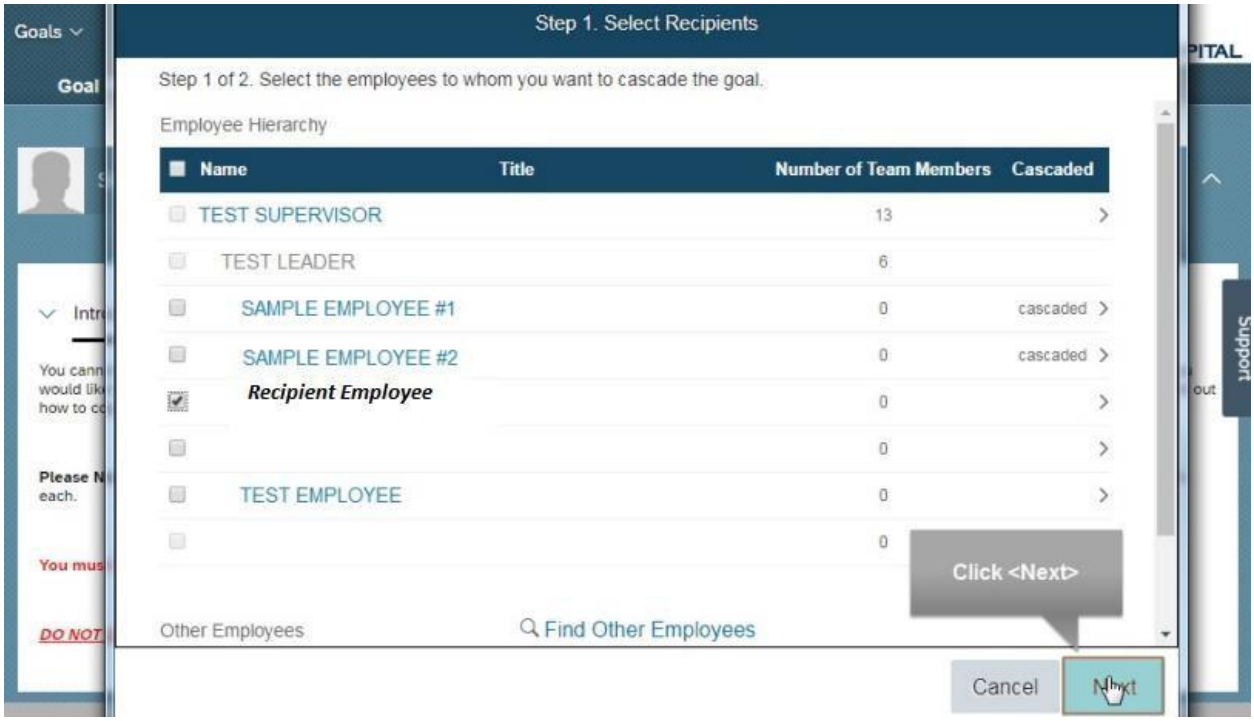


b. You will then select the name (s) for the direct reports you want to cascade the goals to.

***** You cannot cascade goals for employees who are not your direct reports.***



8. Click **"Next"**

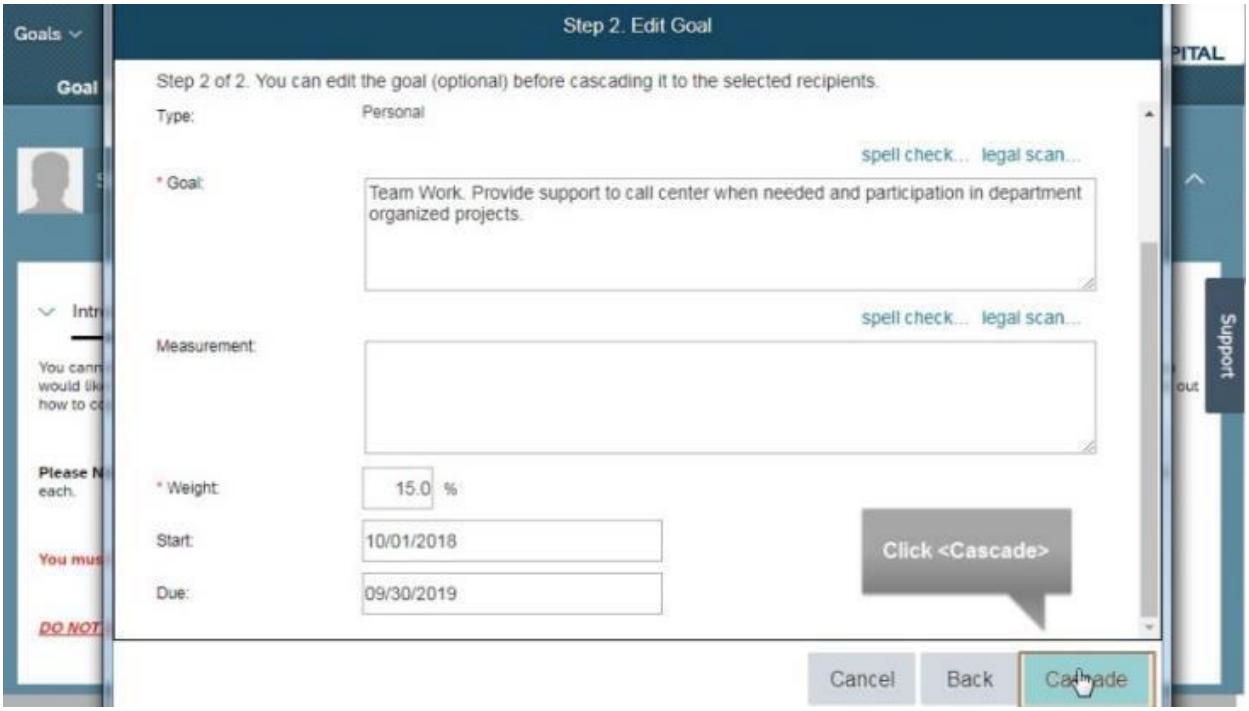


***** The system notifies you of which of your direct reports have already been through the cascading process***

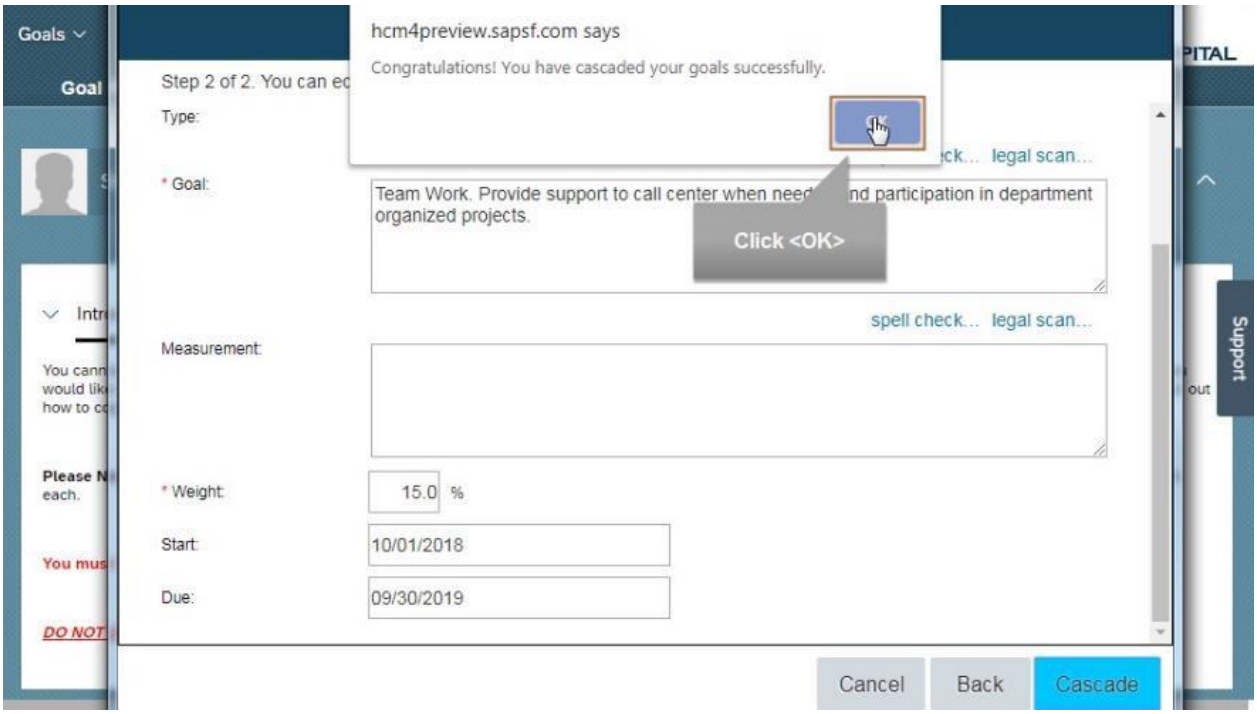
***** If the goals are on two pages, you will need to complete the cascade process for each page***

a. SuccessFactors gives you the option of modifying the copied goal (or goals) before it is cascaded to other employees.

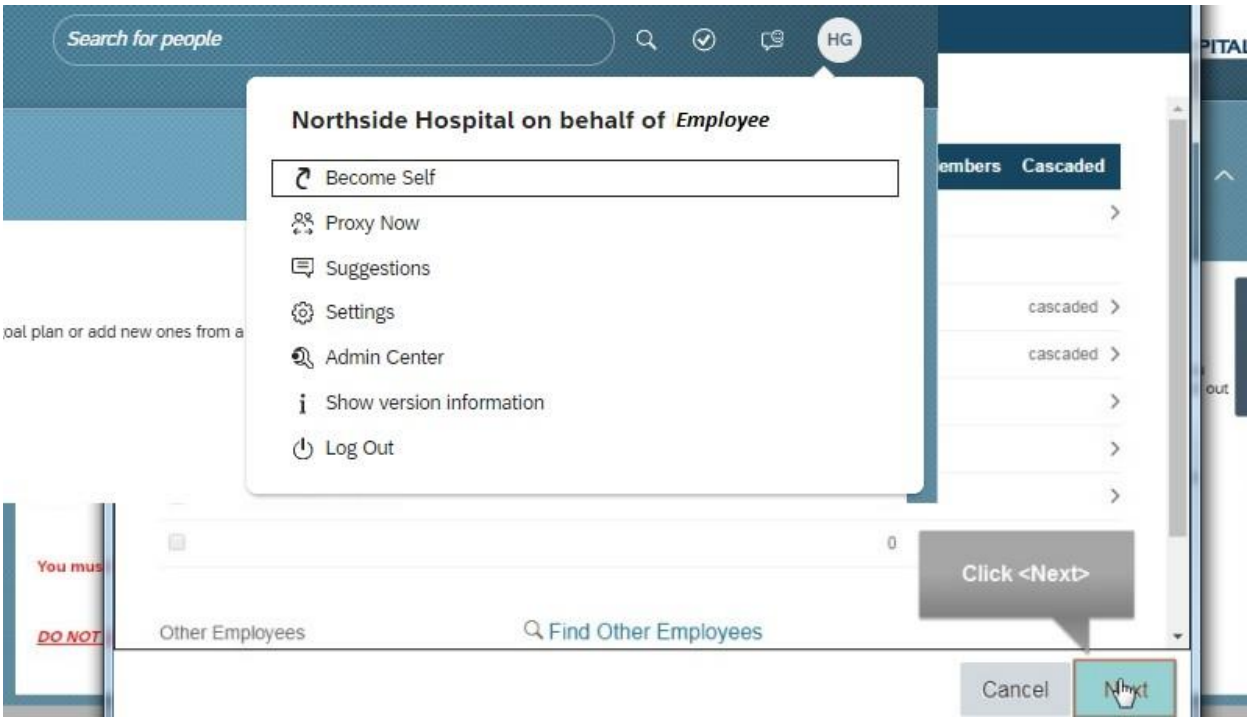
9. Once you have completed modifying the goal, scroll down, and click **"cascade"**



10. A confirmation pop-up box will appear verifying that you have cascaded your goal successfully. Click **"OK"**



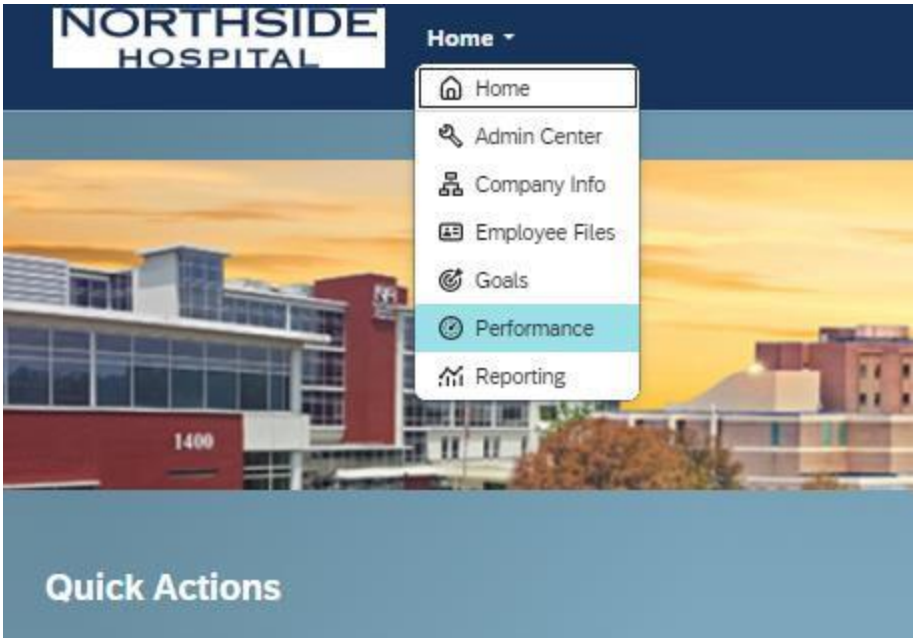
11. In order to get back to your home page, click the drop down at the top of the right hand corner of the screen and click **"Become Self"**.



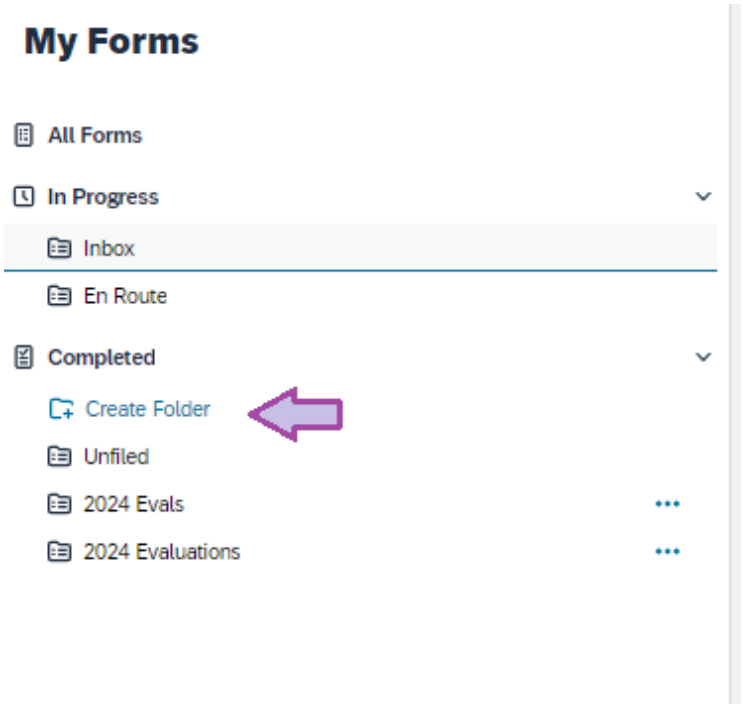
12. Once you are back on your home page, access the goal plan for one of the employees you cascaded to and verify that the goals have been added to the goal plan.

Organizing Completed Employee Evaluations

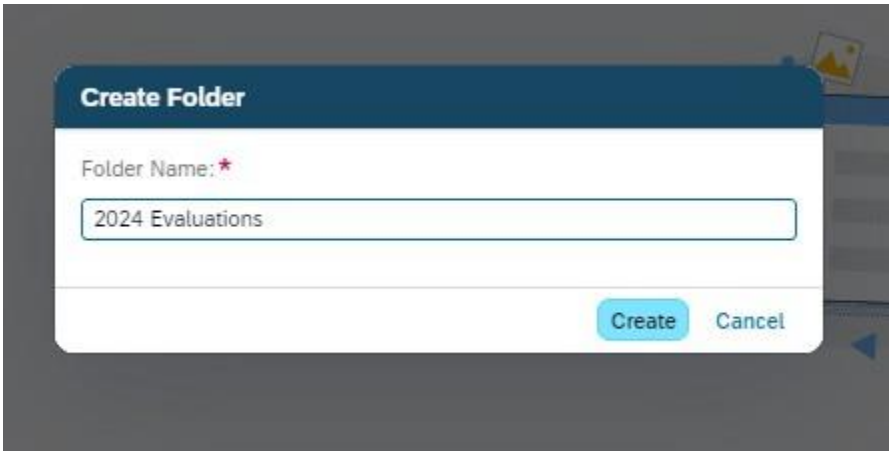
1. From the main menu of SuccessFactors, click **"Performance"**



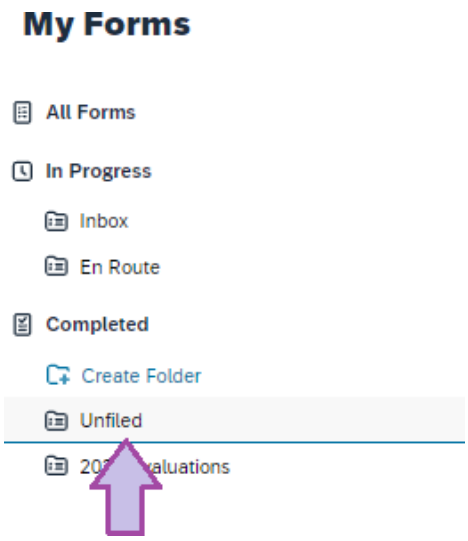
2. Click on "Create Folder" under "Completed"



3. Name the folder (i.e. 2023 Evals, 2024 Evals, etc) and click “Create”



4. Click on the “Unfiled” folder

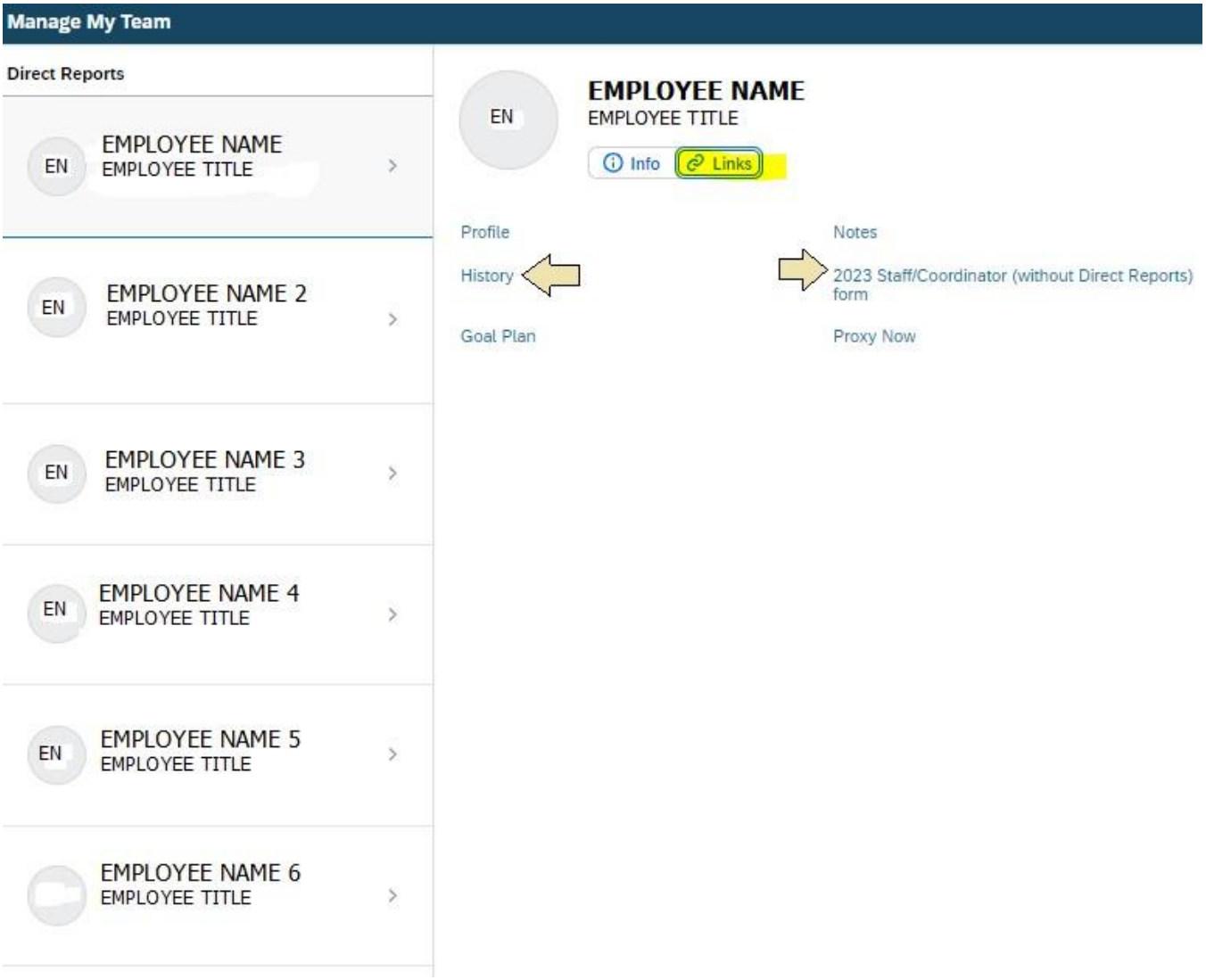


5. Select the evaluation(s) you want to move and select the folder that was created.

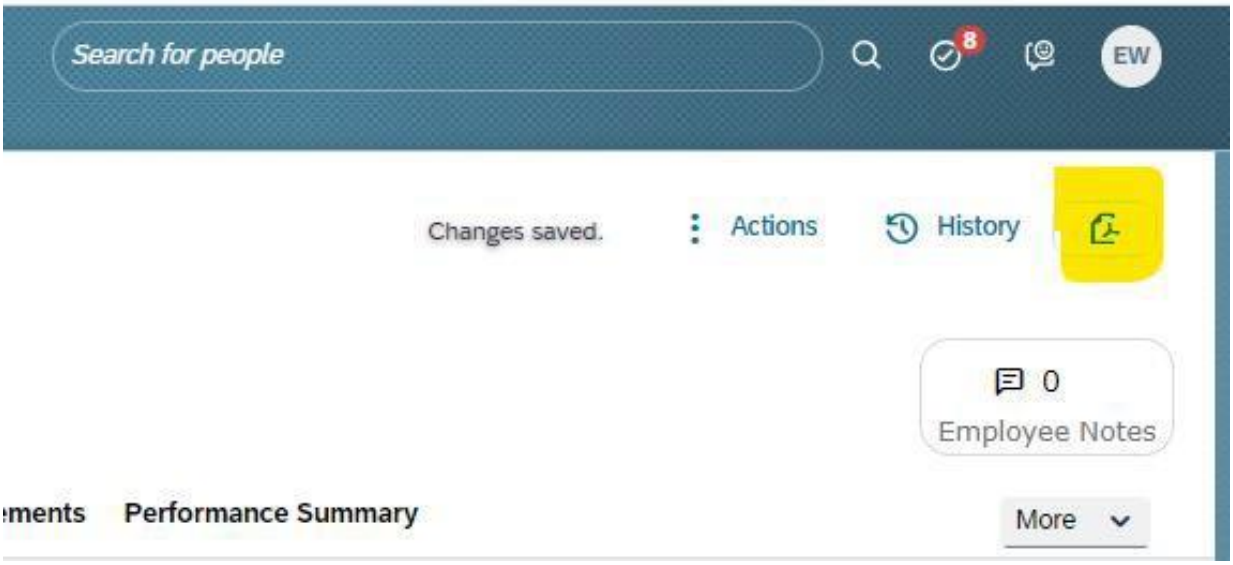


Printing Performance Evaluations

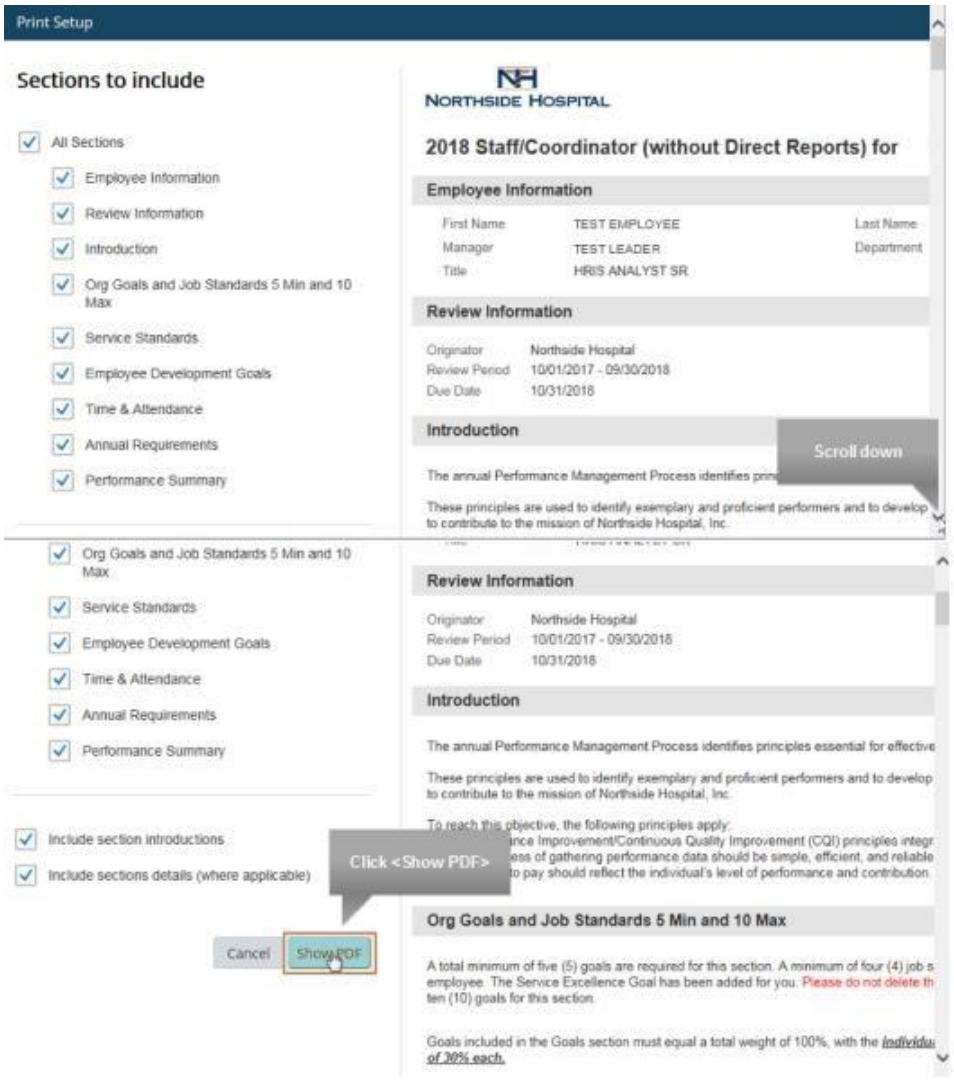
1. From the Home Page of Success Factors, click "**Manage My Team**"
2. Select the Employee whose evaluation you wish to print. Click "**Links**"
    a. You may select the most recent evaluation – OR –
    b. You may select History to choose an older evaluation **different print instructions apply**



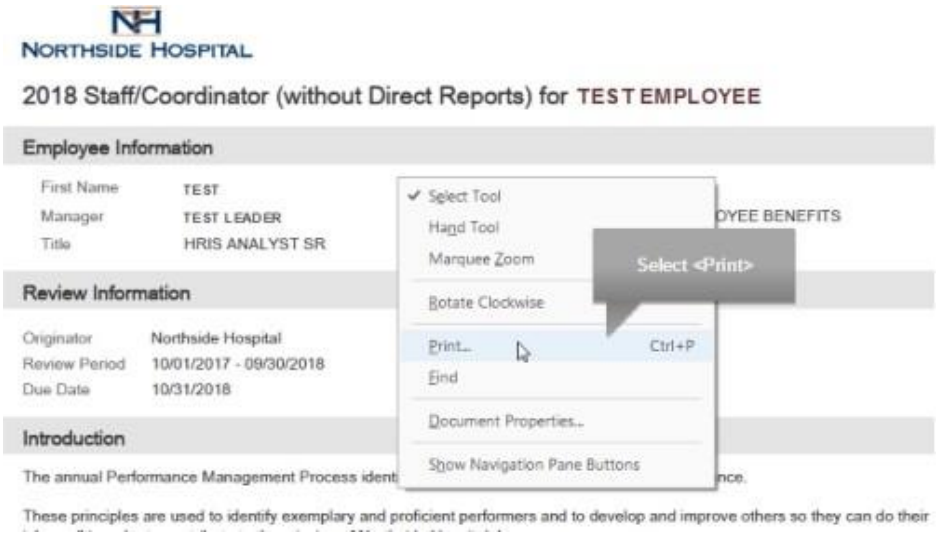
3. **If you select the most recent evaluation,** select the PDF symbol in the top right of the screen



4. You will be taken to a PDF version of the evaluation. Click Show PDF a. You have the option to select the section to include in the printed version

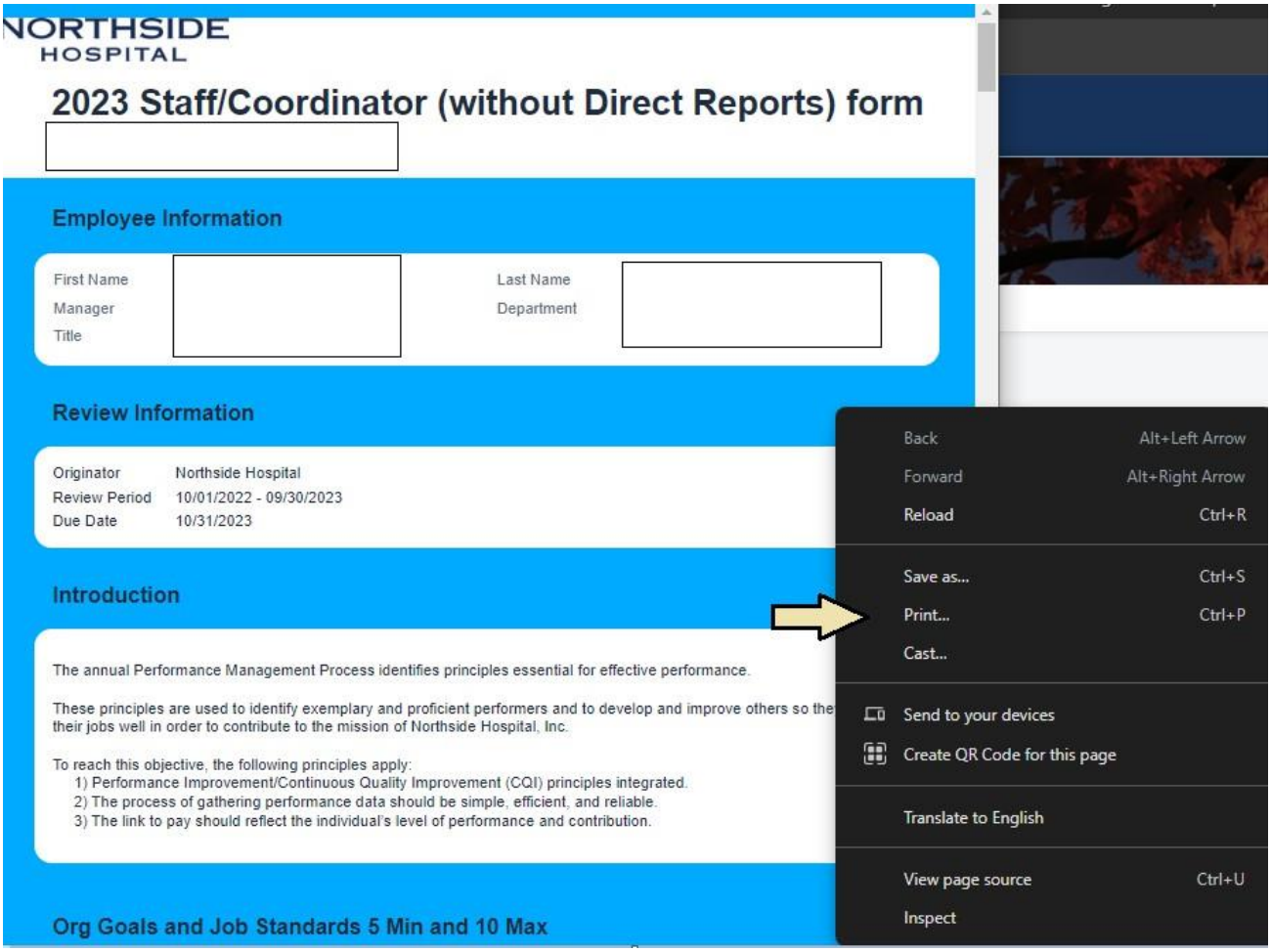


5. When the PDF opens, right click your mouse and select Print



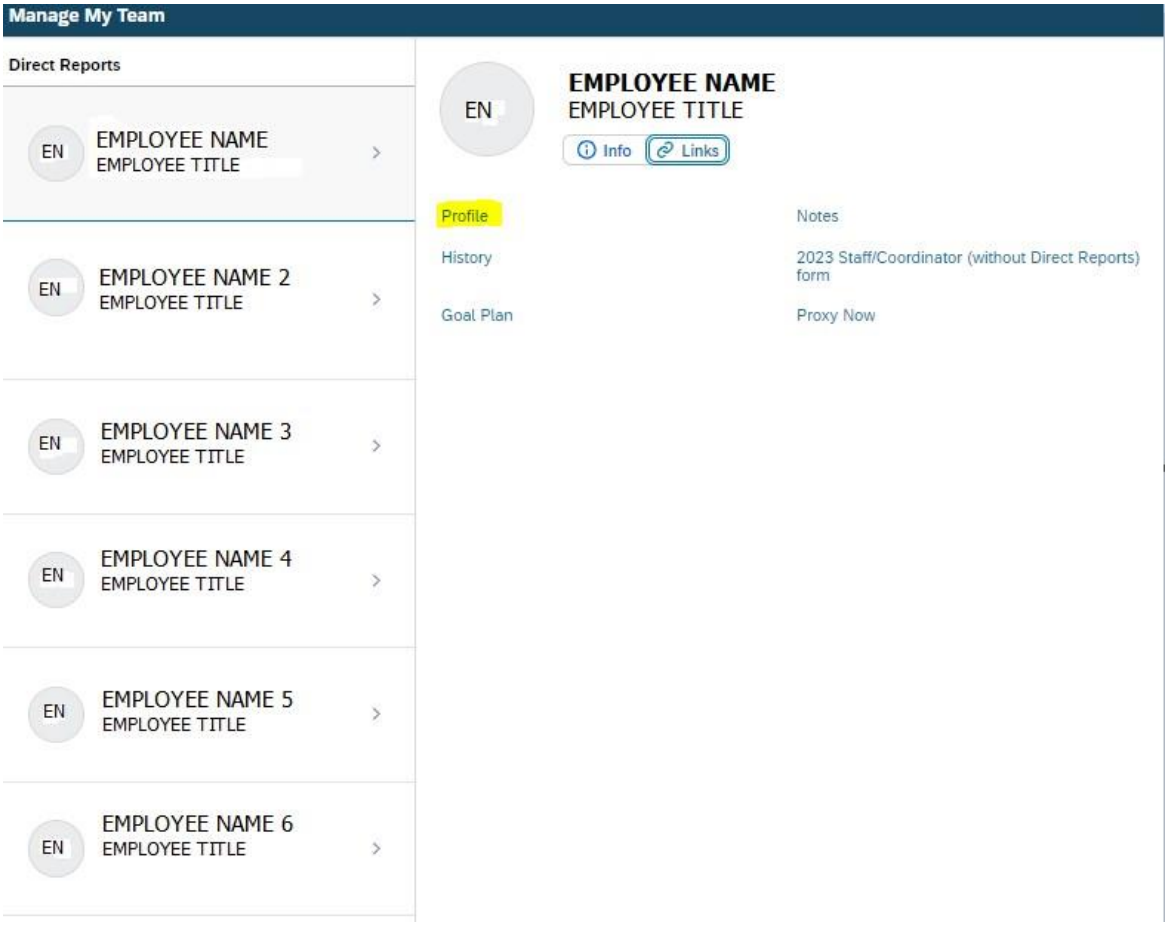
***If you navigate through the History page, the evaluation you select will pop up in a new dialogue box.

Simply right click the form, and click "print"

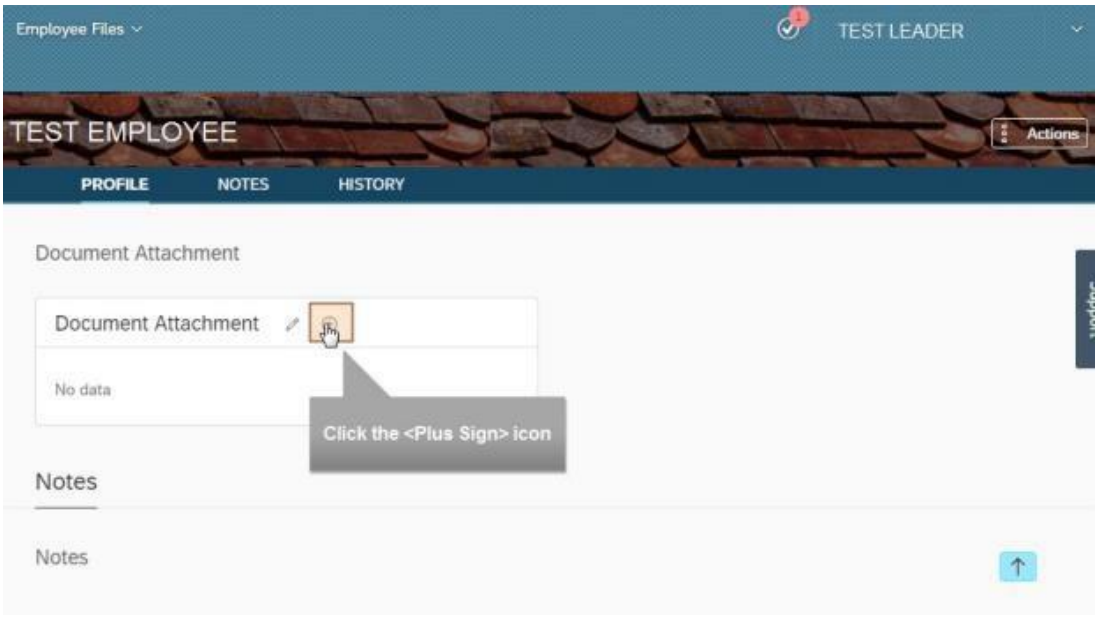


Uploading a Document

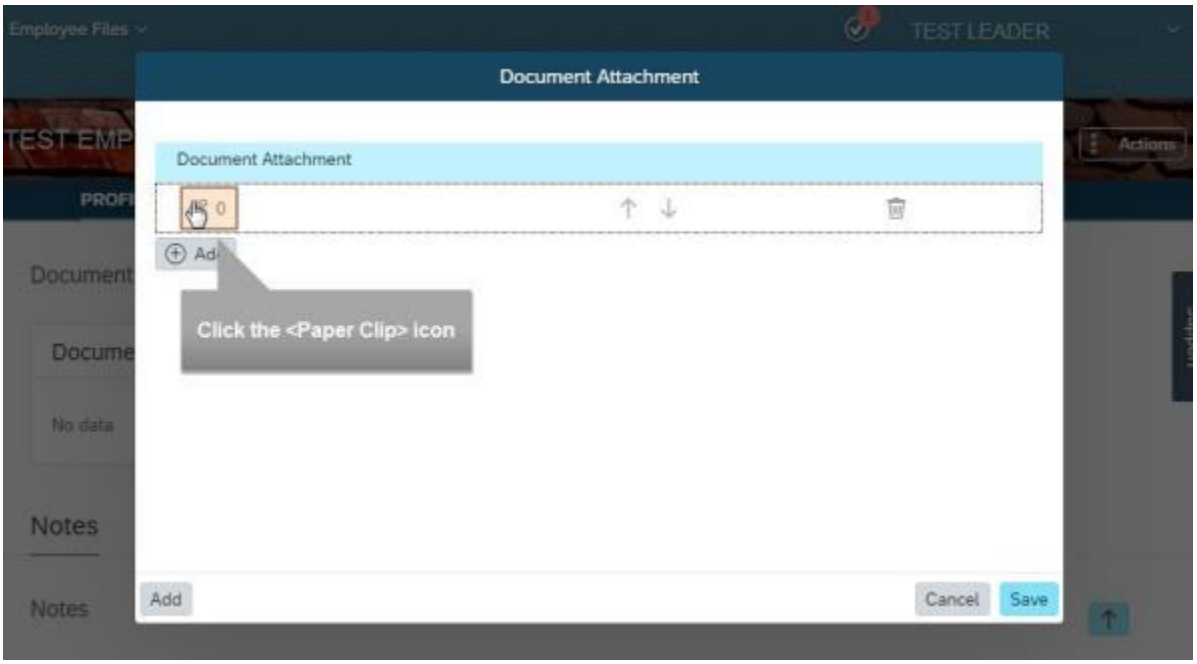
1. From the Home Page of Success Factors, click **"Manage My Team"**
2. Select the employee that you wish to add a document for. Click **"Links"** and **"Profile".**



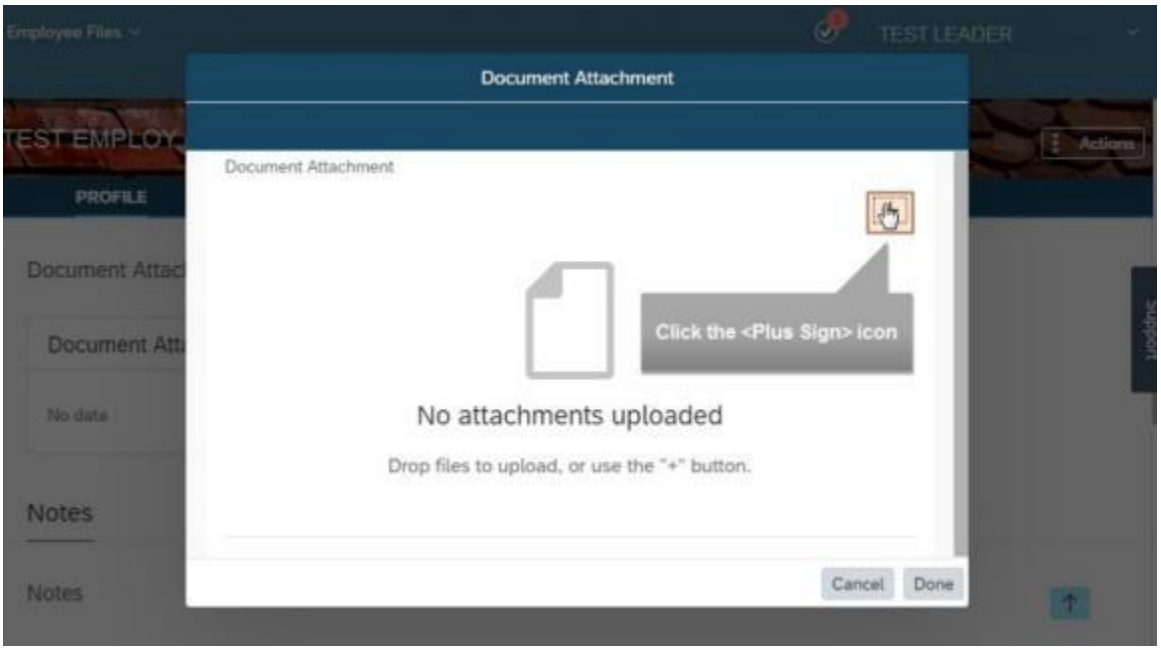
3. You are now on the selected direct report's profile page. To add the attachment, scroll down and click the black plus sign



4. Click the paper clip icon



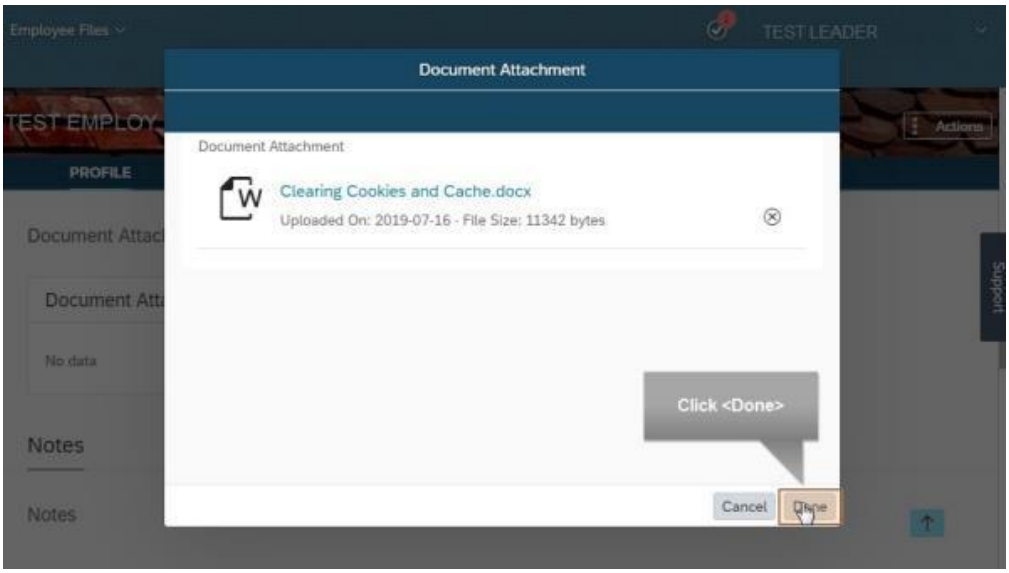
5. Click the black plus sign



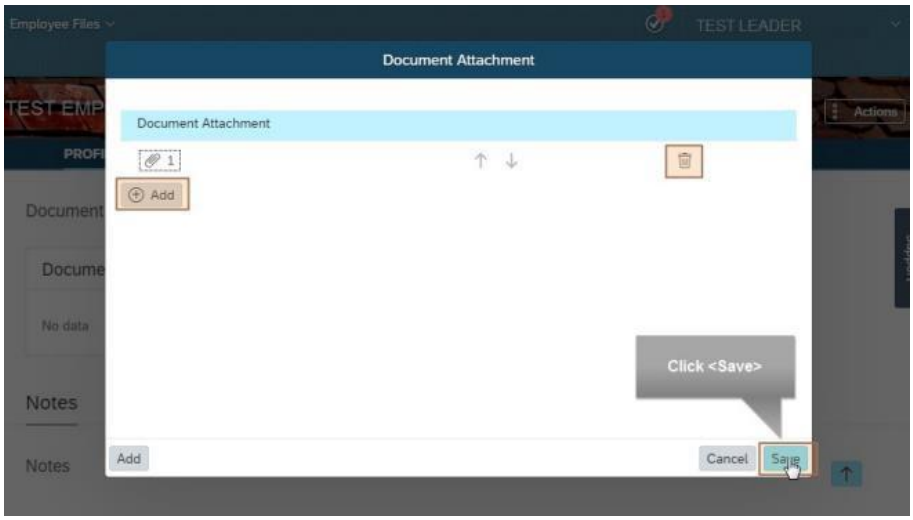
6. Browse your computer files to find the performance related document you want to upload for your direct report. Select the file, click **"open".**



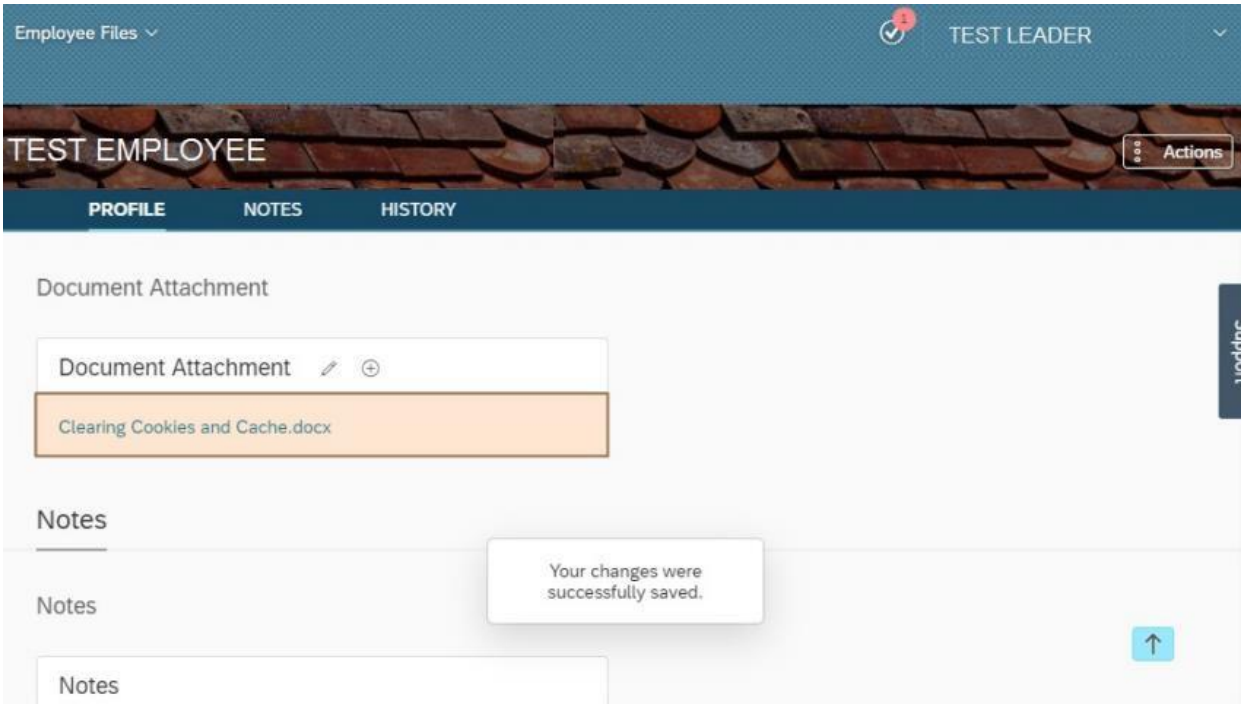
7. Click **“Done”**



8. **Click “Save”**

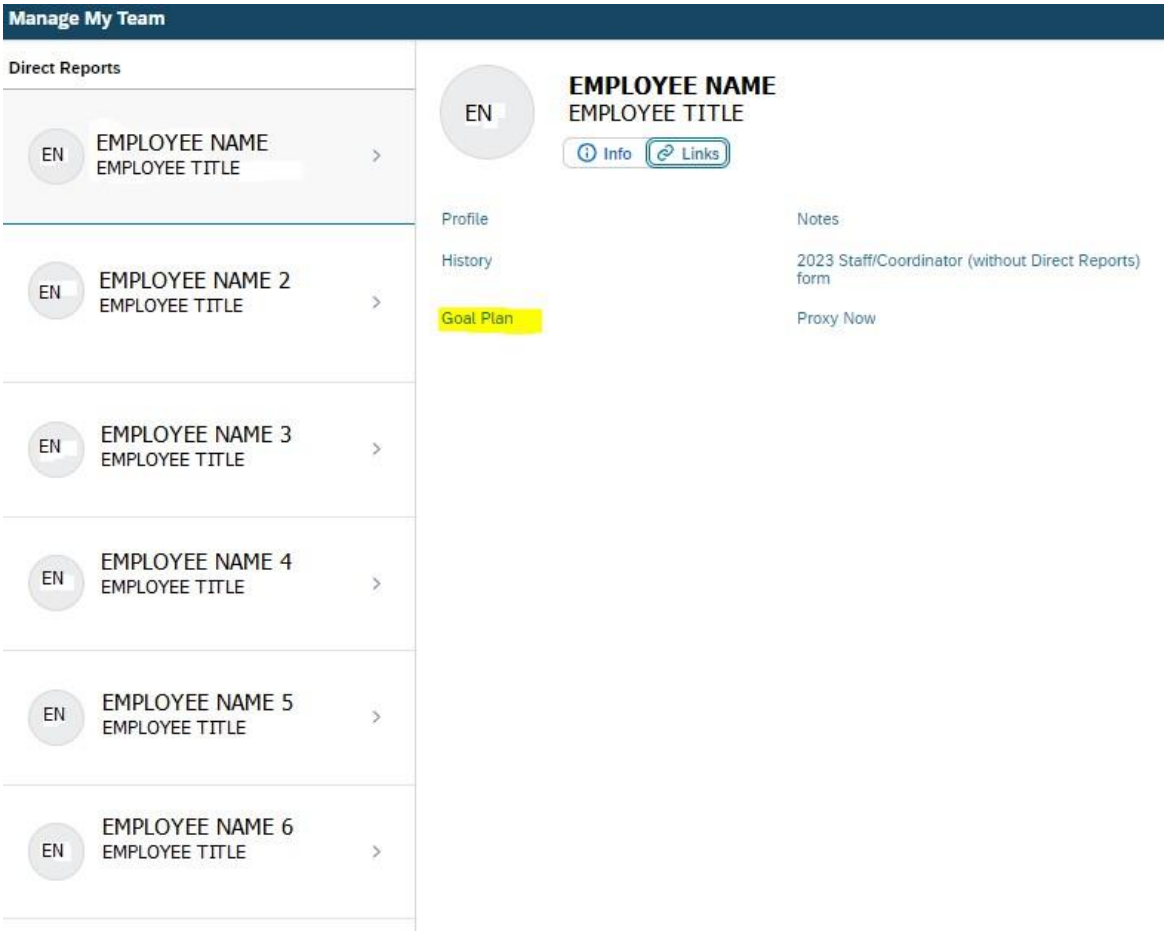


9. You have now added an attachment to your direct report's profile.

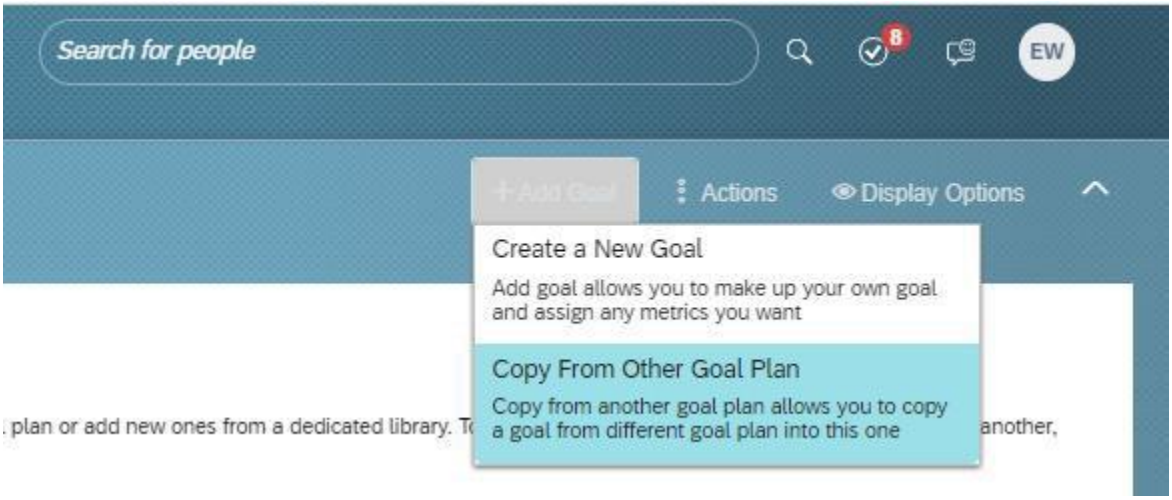


Copying Goals from Previous Year Goal Plan

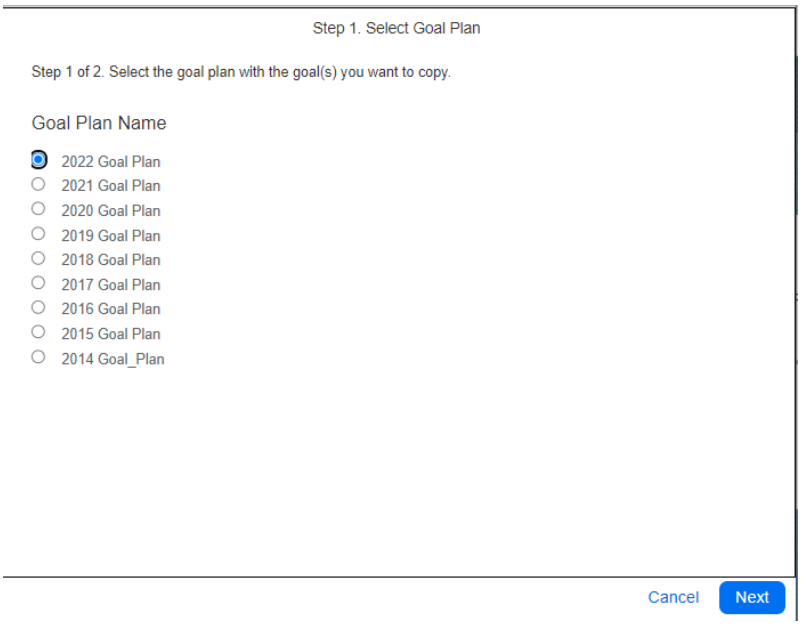
1. From the Home Page of Success Factors, click **"Manage My Team"**
2. Select the employee that you wish to copy prior year goals from. Click **"Links"** and **"Goal Plan".**



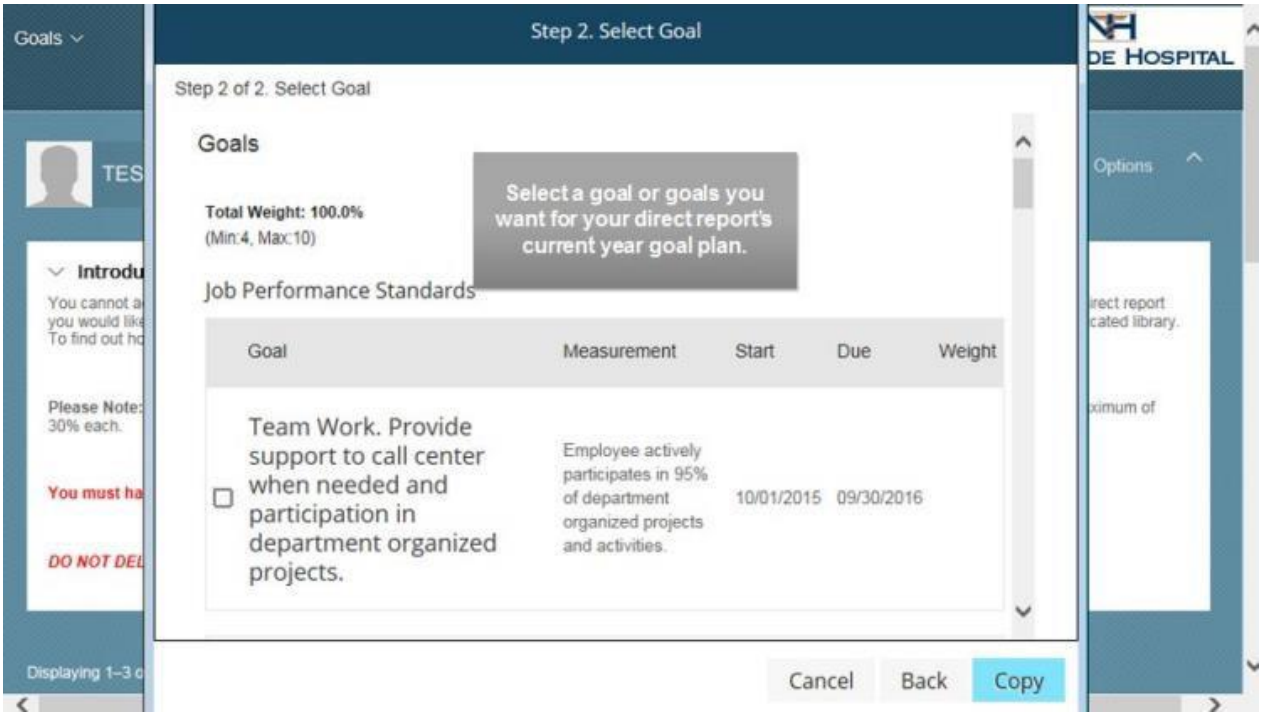
3. You will be taken to the selected direct report's goal plan. Ensure you are on the current year goal plan and click **"Add Goal" > "Copy From Other Goal Plan"**



4. Select the Goal Plan with the goals you want to copy and select "Next"



5. Select the goal(s) you want to copy to the current year's goal plan by checking the appropriate boxes and click "copy"



**** DO NOT select Organization Wide Goals (i.e. Service Standards and Retention). Northside will assign these goals to the employee goal plans each year.**

Additional Training and Resources

- Self-Paced Learning and Live Sessions are available at MyNorthsideLearning
- Find Important Dates and Information on SuccessFactors Login/Account Access at Performance Management and SuccessFactors Resources
- Get a copy of the Supervisor Change Form (this link must be opened in Microsoft Edge or Internet Explorer)
    - Also available in the P Drive at Human Resources > HR Forms > Campus Wide Forms
- Access SuccessFactors
- Connect with the Help Desk