UAB MEDICINE

SuccessFactors
People Performance

Quick Reference Guide

SuccessFactors is an online performance management system that centralizes performance documentation including job duties, goals and written feedback. The system also automates the review process, helps to monitor employee progress and facilitates employee\supervisor feedback.

UAB Medicine Performance Review Process

1. The System Administrator will initialize the Employee Self-Review Forms for their UAB Medicine entity in the SuccessFactors System – It is review time!

2. Employees will receive an email notifying them that their Self-Review Form needs to be completed. Supervisors are asked to remind employees of the form and the review period. Supervisors will provide the time and private computer access needed for employees to complete their Self-Review.

3. Employees will complete the Employee Self-Review Form and electronically send the form to their supervisor for review. Supervisors will receive an email that the review is complete.

4. Supervisors will review the Employee Self-Review Form and make appropriate ratings and comments. The Supervisor will schedule a time to meet with the employee.

5. The Employee and Supervisor will meet to discuss the employee's performance and the Employee Self-Review Form. The Supervisor will log into SuccessFactors to review the online form with the employee.

6. After reviewing the form together, the supervisor and employee will electronically sign the review form to complete the annual review process.

Need Help? If you need assistance with the SuccessFactors system email: **SuccessFactors@uab.edu**

Log in to SuccessFactors

Logon ID and Password - You will use your BlazerID and Password to log in to the SuccessFactors System. If you need assistance with your BlazerID, visit BlazerID Central at www.uab.ed/blazerid or contact UAB Information Technology by phone at 205-996-5555 or email at AskIT@uab.edu.

There are several ways that you can access the SuccessFactors system:

1. **Email** - You will receive an email when it is time to complete your Self Review. This email will contain a link to the SuccessFactors System.

2. **ONE** – You can access SuccessFactors from the UAB Medicine ONE intranet Site. From the top menu select **HR & Benefits.** In the center of the page select the SuccessFactors link.

3. **Centernet Support** (http://centernetsupport.hs.uab.edu) – On the Centernet Support home page, select the SuccessFactors link on the right hand side under the **Centernet Topics** menu

4. **Anywhere! –** You can login from any computer by going to (http://www.uab.edu/successfactors)

SuccessFactors ⚔

| Home | Goals | Performance | Development | Company Info | My Employee File | Reports |

1 Home **2** Help & Tutorials   **4**   **5**   **6**   **7**

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Understanding Tabs

1. **Home** – The Home tab summarizes all of your tasks in a "To-do" list. Active tasks are highlighted and underlined. The Help & Tutorials link provides you with printable quick guides and a video tutorial.
2. **Goals** – From the Goals tab you can view and modify your goals.
3. **Performance** – The Performance tab houses all of your SuccessFactors forms in one location. From the Performance tab, you can view and\or manage all of your forms including those In Progress, En route and Completed.
4. **Development** – The Development tab allows you to record and view development goals. Development goals could include gaining a specific skill set for your current role or a future position within UAB Medicine.
5. **Company Info** – The Company Info tab gives you access to the UAB Medicine Employee Directory and Organizational Chart.
6. **Employee Files** – The Employee Files tab gives you access to your electronic employee file or your employee's electronic file. From this tab you can create and store Notes for yourself or any employee in the SuccessFactors system.
7. **Reports** – The Reports tab gives managers access to a dashboard view of team goals and performance review forms.

Understanding SuccessFactors Icons (In Forms)

1   2   3   4   5   6   7   8   9   10   11   12

1. **View Full Form**
2. **View Form By Section**
3. **View Form By Item**
4. **Spell Check** – Check entire form for correct spelling
5. **Legal Scan** – Check the entire form for legality
6. **Print Preview**
7. **Print to HTML or PDF**
8. **Save**
9. **Performance Form History** - When in your self-review form, this icon allows access to your previous performance review forms. When reviewing your employee's self-review form, this icon allows you to access their previous performance review forms.
10. **360 Form History**
11. **Notes History** – View Notes history so that you can easily copy and paste into the performance review.
12. **Info about this Form**

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