



PINNACLEHEALTH

successfactors™

Success Factors

Performance Evaluation and Goal
Management

Employee Manual

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Logging on to Success Factors

Logon Information

Navigation:


The link to Success Factors is available on the Home Page of the Pinnacle Intranet (below the PeopleSoft Self Service Instructions) and also on the “For Employees” Portal on www.PinnacleHealth.org.

The initial User Id and password is your Employee ID Number. Once you login, you will be asked to change your password. The password requirements are as follows:

- Must be at least 8 characters in length
- Must contain at least one letter
- Must contain at least one number
- Must contain at least one special character (ex: ! @ # \$ %)

Example password: 1pa\$\$word

Account Login

 You have successfully logged out. Please close your browser or re-login:

Username:

Password:

Login

[Forqot Your Password?](#)

Home Tab

After you logon, you will be directed to the Home Tab of SuccessFactors. To navigate within SuccessFactors, utilize the tabs at the top of the screen. Clicking the back button on the Web browser will log you out of SuccessFactors

The screenshot displays the SuccessFactors Home Tab interface. At the top, a navigation bar includes the 'Home' tab (circled in red), along with 'Goals', 'Performance', 'Company Info', and 'My Employee File'. Below the navigation bar, the 'Home' page is divided into several sections:

- To-Dos:** A section titled 'To-Dos' with a 'View by Date' option. It contains two main categories:
 - Evaluate Performance:** Includes a 'Discussion' task with a green checkmark and a link to 'Employee signs'.
 - Set staff goals for the upcoming year:** Includes a 'Create Staff Goals for FY13' link and a 'Done' button, with a date of 'Jun 29, 2012'.
- Welcome:** A box with the Pinnacle Health logo and a message: 'Welcome to SuccessFactors. Listed below are links to various resources to assist in developing a goal plan for your staff'. It contains three links: 'Performance Management Website', 'Journey to Excellence - S.M.A.R.T. Goals Tutorial', and 'Goals Library', all of which are circled in red. Below the links, it provides contact information for Kristi Shook and Brad Gaston.
- Directory Search:** A search box with a 'Go' button.
- My Goals:** A section with a dropdown menu currently set to 'FY 2012 Goals' (circled in red). Below the dropdown is a list of goals:
 - UNIT GOAL_PHS_FY12_Employee Engagement - Baseline Less Than or Equal to 4.94
 - SYSTEM GOAL_PHS_FY13_Decrease % of LWOTS at Harrisburg Hospital ED
 - UNIT GOAL_PHS_FY13_Decrease Appointment Time

The Home Page contains a Welcome box with helpful links and contact information for additional assistance.

Also, there is a "My Goals" section listing your Goals for a particular fiscal year. To change the fiscal year, click the drop down box in the "My Goals" section to select the appropriate year.

Employee Information

Employee Files Tab

Navigation

Click on the Employee Files Tab located at the top of the page.

Home Goals Performance | Company Info **Employee Files** Reports

The Employee Profile provides data regarding your position such as name, title, email address and Job Family.

The screenshot shows the 'Employee Profile' page for 'KARL KING'. At the top, there are buttons for 'Save', 'Cancel', and 'Print Preview'. Below the name, there are tabs for 'Profile', 'Scorecard', 'Notes', 'History', and 'Compensation Statement'. The 'Profile' tab is active, displaying a table of personal information. On the left, there is an 'Outline' sidebar with a search box and a list of people, including 'Erin Eisley' and 'Karl King'.

Personal Information	
<i>Personal Information</i>	
User Name	kkkk
First Name	Karl
Middle Initial	
Last Name	King
Title	Sales Rep
Business Phone	
Email	bgaston@pinnaclehealth.org
Location	N/A
Job Family	H3
Job Role	N/A
Manager	Erin Eisley
Department	N/A
Hire Date	
Next Review Date	07/01/2003

Goal Management

Goals Tab

Navigation

Click on the Goals Tab at the Top of the page.



Once you have navigated to the Goals Tab, the Goals that your supervisor assigned to you will be listed. Each Goal has its own Goal Statement (what the Goal is), Metric (how the Goal is measured), Weight, Status and Rating. Additionally, your supervisor may have created a 90-day action plan for a specific Goal and it will appear as indicated below (more information regarding 90-day action plans is detailed in a later section of this manual).

Goal Statement	Metric	Weight	Status	% Complete	Actual	Rating	Action
SYSTEM GOAL_PHS_FY13_Decrease % of LWOTS at Harrisburg Hospital ED	Decrease Percentage of LWOTS at Harrisburg Hospital Emergency Department.	50.0%	Completed	0.0%	3	3	
Results are based on rolling three month average.							
Quarter and 90 Day Goal	Action Steps					Results	
1st Quarter	Follow-up with all patients in with waiting room wating more than 15 minutes utilizing AIDET					Utilized AIDET 98%	
Target Level	Score						
4.41	1						
4.4	2						
3	3						
1.9	4						
1	5						

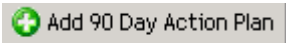
90-Day Action Plan



Creating A 90-Day Action Plan

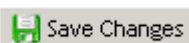
Navigation

Your Supervisor or Manager may ask you to create a 90-day action plan for your Goals. To create a 90-day action plan, click the Goal Statement next to the appropriate Group Goal to edit the Goal.

Service				
Goal Statement	Type	Metric	Goal Type	Weight
<input checked="" type="checkbox"/> Increase Customer Satisfaction Scores by 2%	Group (Version 2.0)	Increase Customer Satisfaction Scores by 2%	Custom	20.0% <input type="text"/>
FY11 - Base = 4%				

In the Edit Goal Pop-Up Box, Click . You will see a row appear where you can add an Action Plan Description. To add another row, click the green plus sign. The Quarter description will default to 1st Quarter. This can be edited by Typing 2nd Quarter in the description space. Type a description of the Action Plan in the Action Step Column. If applicable, the Action Step Text can be copied and pasted into the next Quarter Action Step Description. Once results are obtained, they can be entered in the applicable box.

90 Day Action Plan:	Quarter and 90 Day Goal	Action Steps	Results	Action
	1st Quarter	Submit 100% of Customer Satisfaction Surveys		
	2nd Quarter	Submit 100% of Customer Satisfaction Surveys		

After you have completed entering your 90-day Action Plan, click . You can edit a 90-day Action Plan by following the steps detailed above.