**Frequently Asked Questions:**

**Goals**

- **Is there a limit to the number of goals a user can enter? Overall or by category?**
  There is no limit. However, keep in mind the S.M.A.R.T. goal guidelines to ensure you have not set too many to realistically accomplish.

- **Are Tenet specific goals such as BSC and Initiatives included in the Healthcare Goal Library in SuccessFactors?**
  Yes, the categories include: BSC – Service, BSC – Quality, BSC – Cost & Growth, BSC – People, HCHAPS, and Nursing.

- **Why can’t I see more levels of my reports than just my direct reports on my Goals homepage?**
  In your Goals homepage, you can only view your direct reports and their goal plans. However, if you go to the Reports tab, expand the Filter Options, and select 2 or 3 below in the “showing these levels” boxes on the right you can include those individuals in your reporting dashboard which will allow you to audit their goal plans as well. Even though you can’t see reports 2 or 3 levels below in your goals homepage, you can still cascade or link goals to them by searching for them using the “Find Other Employees” option from the cascade page that lists your direct reports.

- **Can I export my team’s goals into a report format?**
  Yes, you can export reports from the goals dashboard in the Reports tab. First, go to the Reports tab, select the link for total number of goals under the goal distribution section. You can click on any of the links to get to more specific data (only those that don’t have goals, etc) or any of the chart sections (to see only unaligned goals or just Initiatives, etc). Then, choose the Export to Excel button to open or save the data in an excel file.

- **What is the difference between cascading, linking and assigning goals?**
  Supervisors (those with direct reports) are the only people who can cascade goals to their direct reports. They cannot cascade goals up to their Supervisors. All employees can link goals to their direct reports if they have them or their Supervisors (one level up). Cascaded and linked goals can be edited by both the creator and those that received the goal from another person. Supervisors and Matrix Managers can assign goals None can occur if the Supervisor (those with direct reports) have not entered their goals in SuccessFactors.

- **I linked a goal to my Supervisor by mistake and I need to unlink it?**
  From your goals homepage, select the goal you wish to unlink (click on the goal itself-it is a link). You will be taken to a goals detail page and at the top of the page there are three links: Your Supervisor’s Name, The goal itself, and Unalign. Click the Unalign link-a confirmation box will appear. Click OK and your goal will be unaligned. If you are a Supervisor and want to unlink your goal from an employees goal, from your goals homepage, select the goal you wish to unlink (click on the goal itself-it is a link). You will be taken to a goal detail page and at the bottom of the page it will display the direct reports who have linked a goal to the goal you selected. Click the Align icon (chain link) next to the goal you wish to unalign to Unalign the goal from your plan. A confirmation box will appear. Click OK and your goal will be unaligned.

- **What if I already created my goals and cascaded them to my direct reports and then my supervisor cascades goals to me that are the same topics but written differently?**
  To ensure goal alignment and keep your goal plan easy to follow, rewrite your original goal to match your Supervisors goal. Then delete the goal they cascaded to you (now you have it written in your goal plan so
no harm in deleting it) and then link that goal up to your Supervisor. This way, your direct reports, you, and your Supervisor will all be aligned.

Performance Reviews

✓ Do I have to comment on every goal in the performance review process?
Employees, Supervisors and Matrix Managers have the option of commenting on each goal. You may want to use this function if you would like to provide more detail regarding a status of a goal, such as why a goal might be behind target or not started, and document this information in your goal plan. This step is not required.

✓ Do I have to write an Overall Comment in the performance review process?
Employees, Supervisors and Matrix Managers (if applicable) are required to write an Overall Comment on performance against goals during Year-End Performance Reviews.

✓ Do I need to give myself an overall rating? Does my supervisor give me a rating?
During Year-End Performance Reviews, Employees, Supervisors and Matrix Managers (if applicable) are required to submit an Overall Comment in the performance form and only Supervisors are required to submit a performance rating.

✓ What if I do not agree with my Supervisor's performance rating and I do not want to acknowledge and save it in SuccessFactors?
You should first talk with your Supervisor about their performance rating. You may select the “Return to Supervisor for further Discussion” button instead of the “Acknowledge” button at the bottom of the performance form to send it back to your Supervisor’s inbox for review. The last step of the performance review process is the Employee Acknowledgement so remember: Acknowledgement does not imply agreement or disagreement, only the acknowledgement that the discussion occurred.

✓ Do I have to update my goals in the Goals module before I can start the Performance review process in the Performance module?
No. The Goals and Performance modules are linked until the Acknowledgement phase so any edits you make to your goals in the Performance module will update your goal plan in the Goals module as well and vice versa. If you need to make edits or updates to this year’s goals before you send your performance forms for review please do so in the Performance module.

✓ Will SuccessFactors Performance close after a certain date?
Yes. The Performance module will “lock” after February 10th to document performance reviews for 2015. You will not be able to edit or send within the system after this date but can access your completed forms at any time.

✓ My Employee’s performance form is missing some key goals. Can I send back to them for edits?
Yes. You can select “Return Form For Edits” instead of “Send Completed Form for Employee Acknowledgement” to return the form to the employee for edits.

✓ I am trying to align to my Supervisor goals but there is nothing to choose from?
You can only align to your Supervisors goals if they have entered them in SuccessFactors. Go ahead and save your goals and once your Supervisor has completed goal-setting you can log back in and link them.

✓ Can I search for other employees outside of my team?
Yes, you can search for other employees but cannot cascade or link to anyone outside of your direct reporting line. Ex: a Supervisor can align a goal to their direct reports and Supervisor, but not to their peers or other employees outside of their direct reports. You also cannot view goal plans for employees other
than your Supervisor or direct reports. Their goals page will appear but it will be blank. A Supervisor and anyone above them in their direct reporting line can view the Employee File.

**Can I add new goals at Mid-Year?**

Yes, refer to the Setting Goals in SuccessFactors section of the user guide to review how to add goals.

**All of my goals aren’t appearing on the screen?**

You may have multiple pages in your goal plan. If so, a link will be provided on the right side of your goal plan that says “View Next # Goals”. Click here to view the rest of your goals.

**Can I delete a goal?**

Yes. Select the goal you wish to delete by checking the box to the left hand side of the goal. Then hit the "Delete Selected" button in the upper left hand corner of your screen (next to the Cascade Selected button if you have direct reports). Hit OK when the confirmation box pops up and your goal will be removed from your goal plan.

**When I delete a goal will it delete in all the plans that I have cascaded, linked or assigned it to?**

If you delete a goal you have cascaded or linked to other employees (or a goal that has been cascaded or linked to you) it will not be removed in those employees’ goal plan. Each employee should remove the goal in their own goal plans. Supervisors will not be notified when employees delete a goal. If a goal was assigned, it can only be deleted by the creator and if the creator deletes the goal it will be removed from all goal plans.

**I added a comment in my Goal plan but now I want to edit it. When I click the “edit icon” it doesn’t let me change the comment text?**

You cannot edit a comment after you have saved changes. Therefore, if you want to edit a comment you should delete the original goal (see Deleting Goals section) and start over or add a new comment in addition to your original with your changes.

**How do I send my updated Goal Plan to my Supervisor and/or Matrix Manager?**

Currently, there is no way to send formal notifications within the Goal module of SuccessFactors. Therefore, you will need to communicate with your Supervisor outside of the SuccessFactors system when you have completed your part of the Mid-Year Goal Updates.

**I can get into SuccessFactors and the Goals module but when I try to create a new goal the pop up box is blank?**

Your computer may be running a version of Internet Explorer that is not yet supported by SuccessFactors. Reinstall the previous version of IE and try logging into SuccessFactors again.

**Will SuccessFactors Goals close after a certain date?**

No. The Goal module will remain open throughout the year for you to edit and track your goal progress.
**Hierarchy**

**✓ Can users change their Hierarchy in SuccessFactors?**
No. Hierarchy can only be updated by Hospital/Facility Human Resource Leaders or Human Resource Customer Service in HRMSweb which are then imported weekly into SuccessFactors.

**✓ Not all of my direct reports are included in my Hierarchy? Why?**
SuccessFactors is open to all Home Office/Regional & Conifer employees but only AIP-eligible hospital employees for 2015-2016. Hospitals and other non-hospital entities should continue using the paper process for their non-AIP eligible employees at this time.

**✓ I can’t see anything in my Reports tab?**
Only employees with direct reports have reporting options.

**✓ In the Reports tab, can I see my direct reports direct reports as well?**
Yes. You can see all levels in your hierarchy in the reports tab. You can choose to see your direct reports, one level down, two levels down, etc. in the Filter Options section of your Dashboard.

**Matrix Manager**

**✓ As a Matrix Manager, how do I see my non-direct reports in my dashboard(s)?**
Under Filter Options select “Matrix Reports” and click the Update button to refresh your screen. You should then be able to view your non-direct reports in your dashboard(s).

**✓ How do I know if I or my employees have a Matrix Manager?**
A Matrix Manager Hierarchy will be present in your goal plan. Matrix Managers are only for the following Functional Leader roles: Directors of Business Development, Chief Human Resources Officers/Human Resource Directors, Chief Nursing Officers, Regional Chief Financial Officers/VPs of Finance, Chief Financial Officers and Chief Medical Officers.

**✓ I am a Matrix Manager but I cannot cascade or link my goals to my non-direct reports listed in my Matrix Hierarchy?**
A Matrix Manager can only view the goal plans of their non-direct reports listed in their Matrix Hierarchy. Only Supervisors can cascade and link goals. Matrix Managers can use the Assign Goal function on the Goals homepage to assign goals to employees.

**✓ Do Matrix Managers have to provide ratings and comments in the performance review process for their non-direct reports?**
A Matrix Manager is required to provide an overall comment before sending the form to the Supervisor for review.