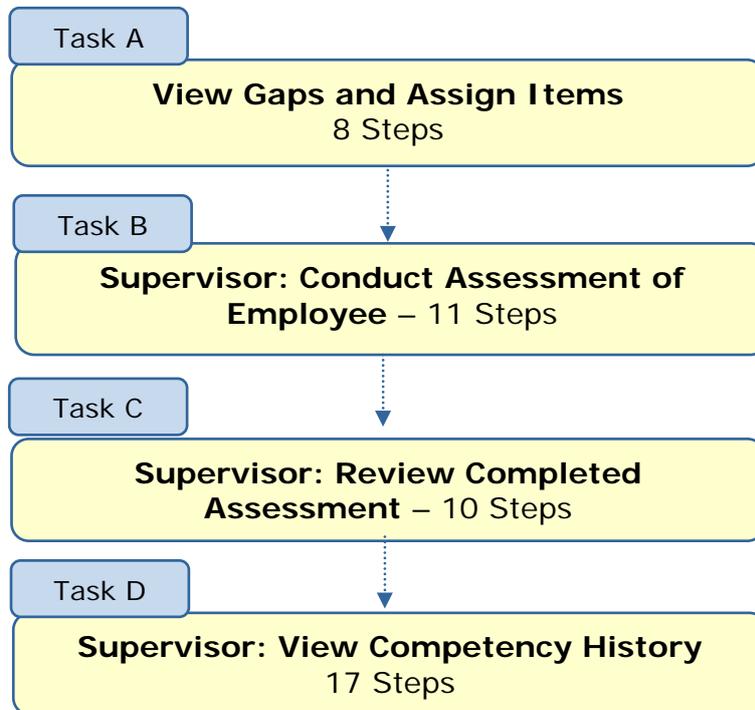


## Job Aid: Participating in a Competency Assessment (Supervisor)

### Purpose

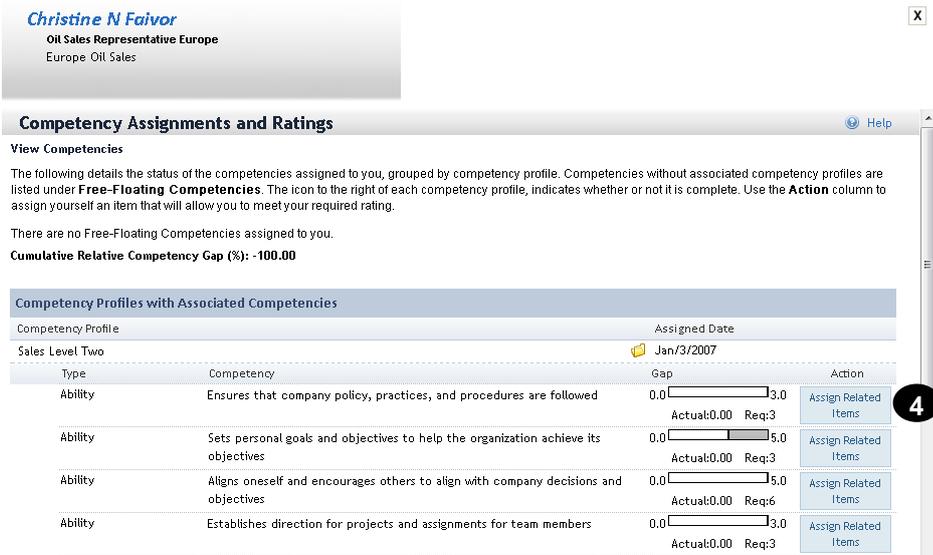
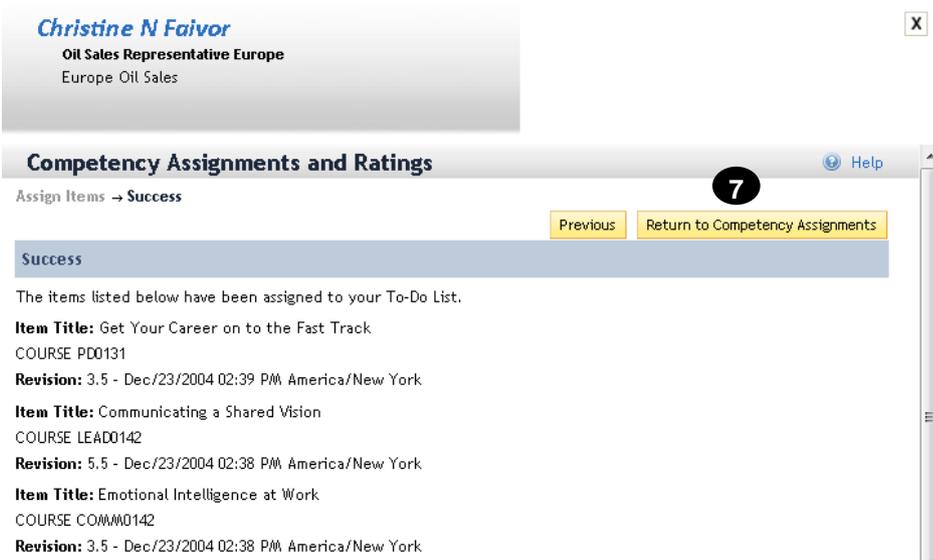
The purpose of this job aid is to guide supervisors through the step-by-step process of participating in a competency assessment by viewing gaps, assigning items, conducting employee assessment, reviewing completed assessments, and viewing the competency history.

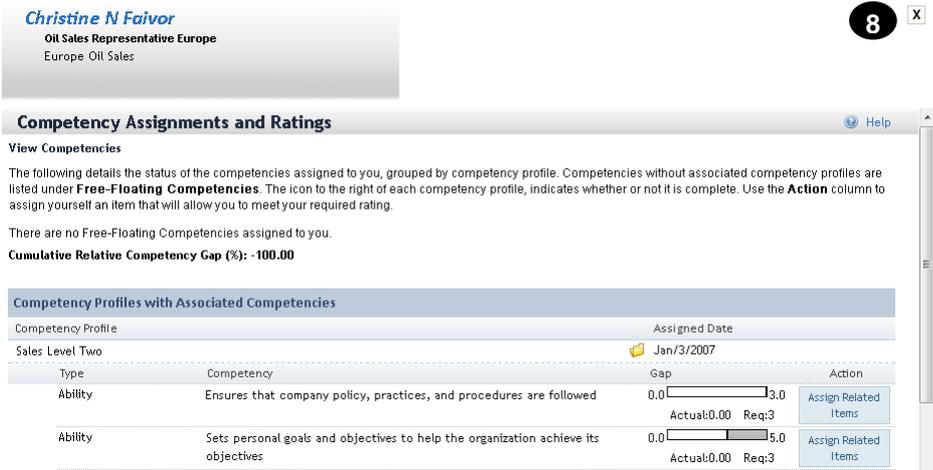


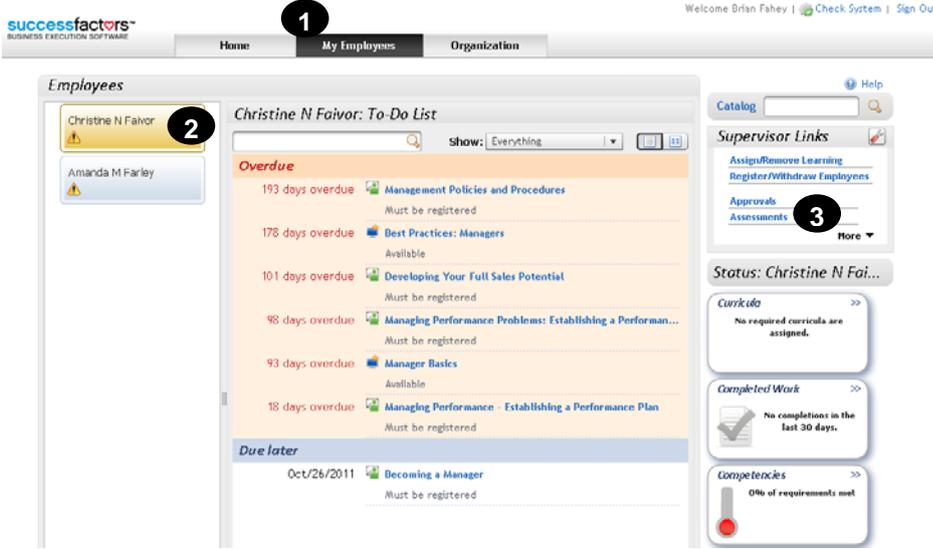
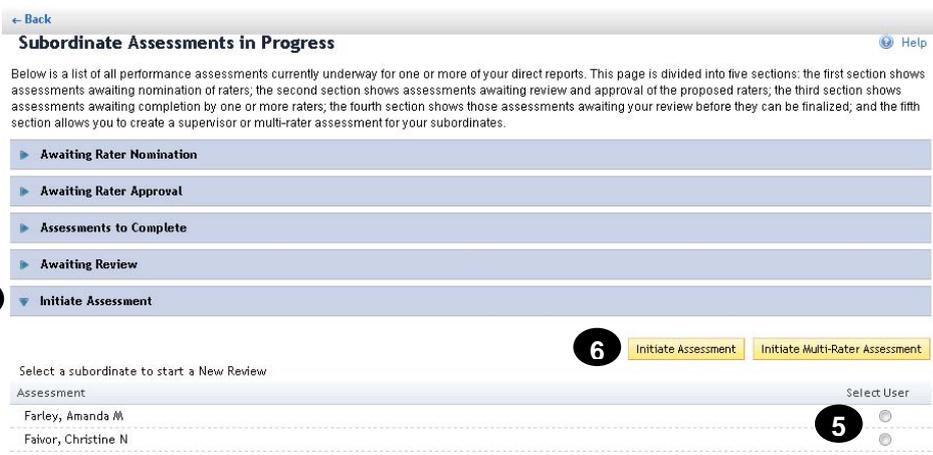
### Task A. View Gaps and Assign Items

- 1 From the Home page, click the My Employees tab.
  - 2 Click a user's card in the employee tree to load the employee's To-Do List and status pods.
- Note: If you hover on a user's card, you can perform some actions without loading that user's To-Do List.*
- 3 Click the Competencies pod.

The screenshot shows the SuccessFactors Learning interface. At the top, there are navigation tabs: Home, My Employees (selected), and Organization. Below the tabs, there's a section for 'Employees' with a list of user cards. The first card, 'Christine N Faivor', is highlighted with a yellow background and a red warning icon. A '2' is placed over this card. To the right of the card is a 'To-Do List' for Christine N Faivor. The list is divided into 'Overdue' and 'Due later' sections. The 'Overdue' section lists several items with their respective due dates and status (e.g., '193 days overdue', 'Must be registered'). The 'Due later' section shows 'Becoming a Manager' due on 'Oct/26/2011'. On the right side of the interface, there are several status pods: 'Supervisor Links', 'Status: Christine N Fai...', 'Curricula' (No required curricula are assigned), 'Completed Work' (No completions in the last 30 days), and 'Competencies' (0% of requirements met). A '3' is placed over the 'Competencies' pod.

<p><b>4</b> View the current competency ratings.</p> <p><b>4</b> To assign an item to meet the required competency rating, click <b>Assign Related Items</b> next to the competency.</p>	 <p><i>Christine N Faivor</i> Oil Sales Representative Europe Europe Oil Sales</p> <p><b>Competency Assignments and Ratings</b> <span>Help</span></p> <p>View Competencies</p> <p>The following details the status of the competencies assigned to you, grouped by competency profile. Competencies without associated competency profiles are listed under <b>Free-Floating Competencies</b>. The icon to the right of each competency profile, indicates whether or not it is complete. Use the <b>Action</b> column to assign yourself an item that will allow you to meet your required rating.</p> <p>There are no Free-Floating Competencies assigned to you.</p> <p><b>Cumulative Relative Competency Gap (%): -100.00</b></p> <p><b>Competency Profiles with Associated Competencies</b></p> <table border="1"> <thead> <tr> <th>Competency Profile</th> <th>Assigned Date</th> </tr> </thead> <tbody> <tr> <td>Sales: Level Two</td> <td>Jan/3/2007</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Type</th> <th>Competency</th> <th>Gap</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Ability</td> <td>Ensures that company policy, practices, and procedures are followed</td> <td>0.0 <input type="text"/> 3.0 Actual:0.00 Req:3</td> <td><b>4</b> Assign Related Items</td> </tr> <tr> <td>Ability</td> <td>Sets personal goals and objectives to help the organization achieve its objectives</td> <td>0.0 <input type="text"/> 5.0 Actual:0.00 Req:3</td> <td>Assign Related Items</td> </tr> <tr> <td>Ability</td> <td>Aligns oneself and encourages others to align with company decisions and objectives</td> <td>0.0 <input type="text"/> 5.0 Actual:0.00 Req:6</td> <td>Assign Related Items</td> </tr> <tr> <td>Ability</td> <td>Establishes direction for projects and assignments for team members</td> <td>0.0 <input type="text"/> 3.0 Actual:0.00 Req:3</td> <td>Assign Related Items</td> </tr> </tbody> </table>	Competency Profile	Assigned Date	Sales: Level Two	Jan/3/2007	Type	Competency	Gap	Action	Ability	Ensures that company policy, practices, and procedures are followed	0.0 <input type="text"/> 3.0 Actual:0.00 Req:3	<b>4</b> Assign Related Items	Ability	Sets personal goals and objectives to help the organization achieve its objectives	0.0 <input type="text"/> 5.0 Actual:0.00 Req:3	Assign Related Items	Ability	Aligns oneself and encourages others to align with company decisions and objectives	0.0 <input type="text"/> 5.0 Actual:0.00 Req:6	Assign Related Items	Ability	Establishes direction for projects and assignments for team members	0.0 <input type="text"/> 3.0 Actual:0.00 Req:3	Assign Related Items
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<p><b>5</b> Select the <b>Action</b> checkbox next to the appropriate item title.</p> <p><b>6</b> Click <b>Assign Selected Items</b>.</p>	 <p><i>Christine N Faivor</i> Oil Sales Representative Europe Europe Oil Sales</p> <p><b>Competency Assignments and Ratings</b> <span>Help</span></p> <p><b>Assign Items</b></p> <p><b>Competency:</b> Sets personal goals and objectives to help the organization achieve its objectives</p> <p>Previous <b>6</b> Assign Selected Item</p> <p><b>Related Items</b></p> <table border="1"> <thead> <tr> <th>Item Title</th> <th>Rating Provided</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Get Your Career on to the Fast Track</td> <td>3</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Communicating a Shared Vision</td> <td>3</td> <td><b>5</b> <input checked="" type="checkbox"/></td> </tr> <tr> <td>Emotional Intelligence at Work</td> <td>3</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>The Boss Factor</td> <td>3</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Building the Service Foundation: Corporate Culture</td> <td>3</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Item Title	Rating Provided	Action	Get Your Career on to the Fast Track	3	<input type="checkbox"/>	Communicating a Shared Vision	3	<b>5</b> <input checked="" type="checkbox"/>	Emotional Intelligence at Work	3	<input checked="" type="checkbox"/>	The Boss Factor	3	<input checked="" type="checkbox"/>	Building the Service Foundation: Corporate Culture	3	<input checked="" type="checkbox"/>						
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<p><b>7</b> Click <b>Return to Competency Assignments</b>.</p>	 <p><i>Christine N Faivor</i> Oil Sales Representative Europe Europe Oil Sales</p> <p><b>Competency Assignments and Ratings</b> <span>Help</span></p> <p>Assign Items → <b>Success</b></p> <p>Previous <b>7</b> Return to Competency Assignments</p> <p><b>Success</b></p> <p>The items listed below have been assigned to your To-Do List.</p> <p><b>Item Title:</b> Get Your Career on to the Fast Track COURSE PD0131 <b>Revision:</b> 3.5 - Dec/23/2004 02:39 PM America/New York</p> <p><b>Item Title:</b> Communicating a Shared Vision COURSE LEAD0142 <b>Revision:</b> 5.5 - Dec/23/2004 02:38 PM America/New York</p> <p><b>Item Title:</b> Emotional Intelligence at Work COURSE COMM0142 <b>Revision:</b> 3.5 - Dec/23/2004 02:38 PM America/New York</p>																								

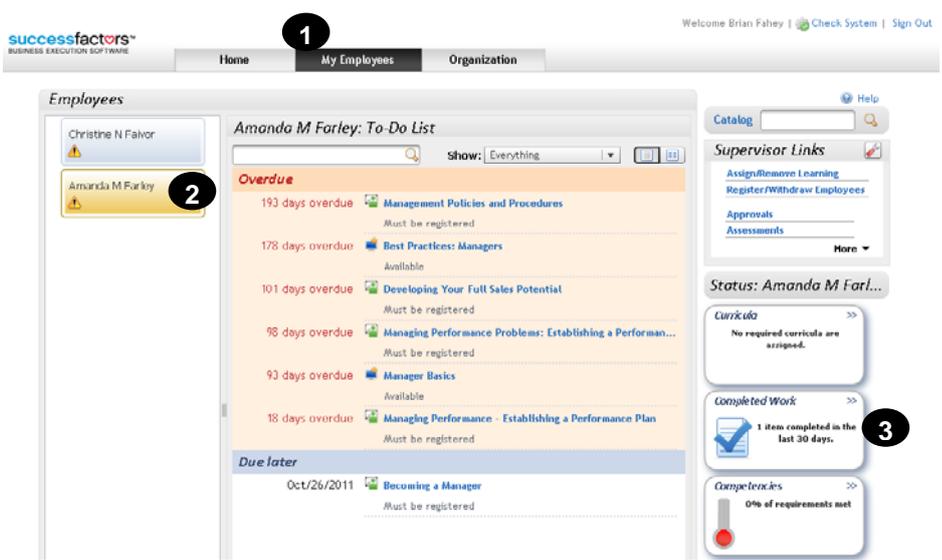
<p><b>8</b> Click the close button (X) in the top right corner to close the employee dialog window and return to the My Employees page.</p>	
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<p><b>Task B. Supervisor: Conduct Assessment of Employee</b></p>	
<p><b>1</b> From the Home page, click the My Employees tab.</p> <p><b>2</b> Click a user's card in the employee tree to load the employee's To-Do List and status pods.</p> <p><b>3</b> From the Supervisor Links section, click the Assessments link.</p>	
<p><b>4</b> Click the expand arrow (▼) to open the Initiate Assessment section.</p> <p><b>5</b> Select the radio button next to the name of the employee to be assessed.</p> <p>Click <b>Initiate Assessment</b>.</p> <p><b>6</b></p>	

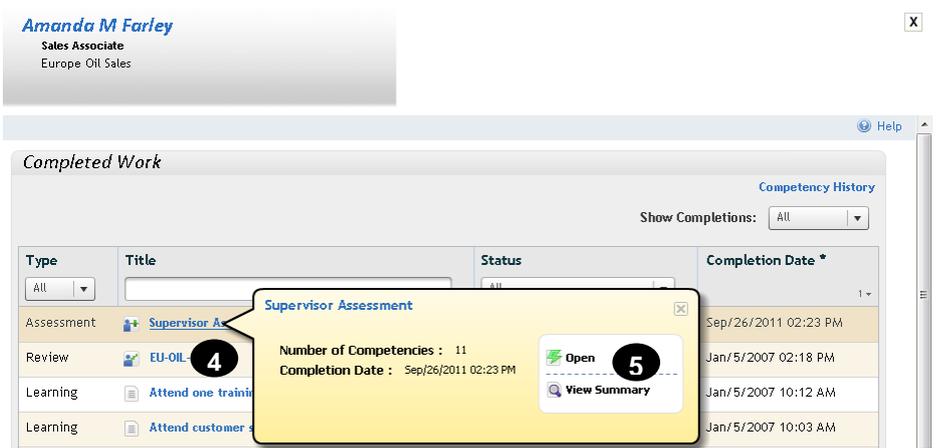
<p><b>7</b> Complete the assessment by selecting the radio button option for the appropriate rating for each competency.</p> <p><b>8</b> Click Add Comments to enter comments about the competency rating, if applicable.</p> <p><i>Note: Ensure you complete all pages of the assessment.</i></p> <p><b>9</b> Click Submit upon completion.</p>	<p><b>7</b> Complete the assessment by selecting the radio button option for the appropriate rating for each competency.</p> <p><b>8</b> Click Add Comments to enter comments about the competency rating, if applicable.</p> <p><i>Note: Ensure you complete all pages of the assessment.</i></p> <p><b>9</b> Click Submit upon completion.</p>	<p><b>Complete Assessment</b> <a href="#">Help</a></p> <p><b>Supervisor Assessment</b></p> <p>Thanks for participating in this competency assessment. Your input is highly valued.</p> <p><b>For:</b> Farley, Amanda M</p> <p><b>Required By:</b> Sep/26/2011</p> <p>Page 1 of 3 <b>9</b> <a href="#">Submit</a> <a href="#">Cancel</a> <a href="#">Next Page</a></p> <p><b>Entry Level Sales Competencies</b></p> <p><b>Entry level skills for sales department</b> ( Skill)</p> <p>Shows basic level skills that match the sales department</p> <table border="1"> <thead> <tr> <th>User</th> <th>N/A</th> <th>1 Has Great Difficulty</th> <th>2 Struggles on Occasion</th> <th>3 Mostly Successful</th> <th>4 Largely Successful</th> </tr> </thead> <tbody> <tr> <td>Farley, Amanda M</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> <td><input checked="" type="radio"/></td> </tr> </tbody> </table> <p><b>8</b> <a href="#">Add Comments</a></p> <p><b>NS Steel Sales Product Knowledge</b> ( Knowledge)</p> <p>Must be able to describe products manufactured at both North American and European facilities</p> <table border="1"> <thead> <tr> <th>User</th> <th>N/A</th> <th>1 Has Great Difficulty</th> <th>2 Struggles on Occasion</th> <th>3 Mostly Successful</th> <th>4 Largely Successful</th> </tr> </thead> <tbody> <tr> <td>Farley, Amanda M</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> </tbody> </table> <p><a href="#">Add Comments</a></p> <p><a href="#">Submit</a> <a href="#">Cancel</a> <a href="#">Next Page</a></p> <p><i>Note: At the top of the assessment, note that this is a Supervisor Assessment for the selected employee.</i></p> <p><i>Note: Rollover each rating title to view a description of the rating.</i></p>	User	N/A	1 Has Great Difficulty	2 Struggles on Occasion	3 Mostly Successful	4 Largely Successful	Farley, Amanda M	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	User	N/A	1 Has Great Difficulty	2 Struggles on Occasion	3 Mostly Successful	4 Largely Successful	Farley, Amanda M	<input type="radio"/>				
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<p><b>10</b> Click Confirm to confirm ratings in the assessment.</p>	<p><b>10</b> Click Confirm to confirm ratings in the assessment.</p>	<p><b>Complete Assessment</b> <a href="#">Help</a></p> <p><b>Supervisor Assessment</b></p> <p>Thanks for participating in this competency assessment. Your input is highly valued.</p> <p><b>For:</b> Farley, Amanda M</p> <p><b>Required By:</b> Sep/26/2011</p> <p>You are about to submit your assessments for the individual(s) listed below. Please review this information before proceeding.</p> <p><b>Assessment Confirmation</b></p> <table border="1"> <thead> <tr> <th>User Name</th> <th>Status</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Farley, Amanda M</td> <td>11 out of 11 competencies assessed 0 comments entered</td> <td></td> </tr> </tbody> </table> <p><b>10</b> <a href="#">Confirm</a> <a href="#">Return To Survey</a></p>	User Name	Status	Notes	Farley, Amanda M	11 out of 11 competencies assessed 0 comments entered																			
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<p><b>11</b> Click Return to return to your Home page.</p>	<p><b>11</b> Click Return to return to your Home page.</p>	<p><b>Complete Assessment</b> <a href="#">Help</a></p> <p><b>Supervisor Assessment</b></p> <p><b>For:</b> Farley, Amanda M</p> <p><b>Required By:</b> Sep/26/2011</p> <p><b>Status</b></p> <p><b>Status:</b></p> <p>Your assessment has been successfully submitted. Thank you very much for your input.</p> <p><b>11</b> <a href="#">Return</a></p>																								

Task C. Supervisor: Review Completed Assessment

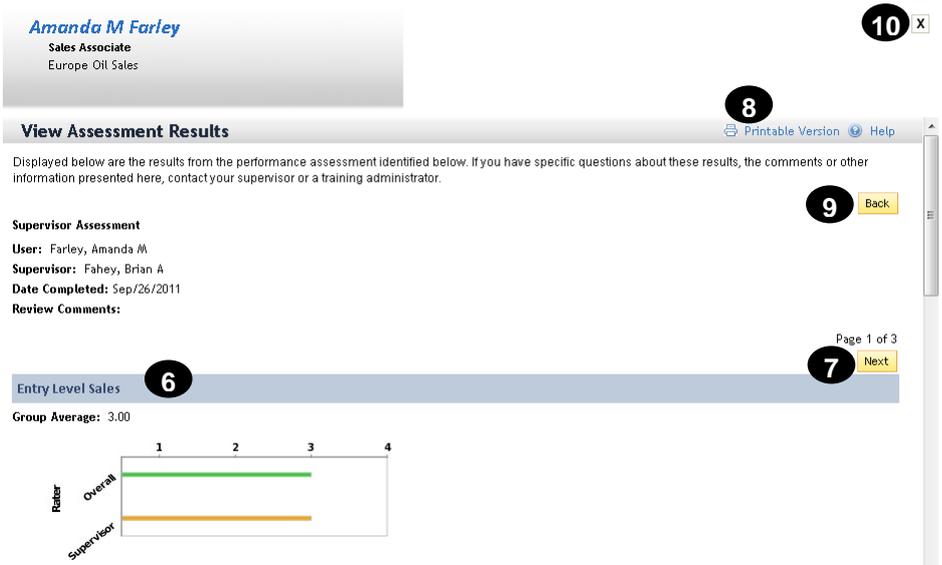
- 1 From the Home page, click the My Employees tab.
  - 2 Click a user's card in the employee tree to load the employee's To-Do List and status pods.
- Note: If you hover on a user's card, you can perform some actions without loading that user's To-Do List.*
- 3 Click the Completed Work pod.



- 4 From the Completed Work window, hover over the title of the assessment to review for additional information.
- 5 Click Open.

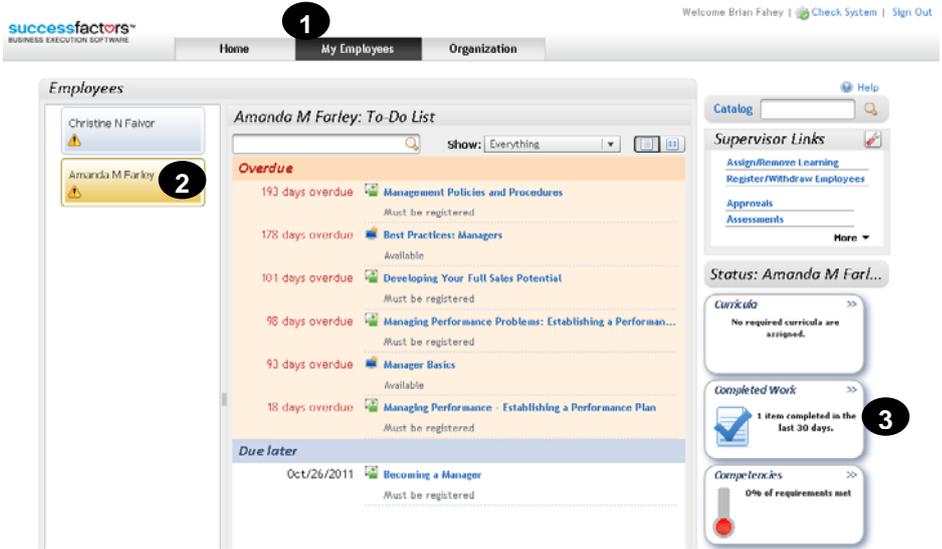


- 6 Review the results.
- 7 Click Next to view the next page(s).
- 8 Click Printable Version to view a printable version of the graphs; then click the Send to Printer link to print.
- 9 Click Back to return to the employee's Completed Work page.
- 10 Click the close button (X) in the top right corner to close the employee dialog window and return to the My Employees page.

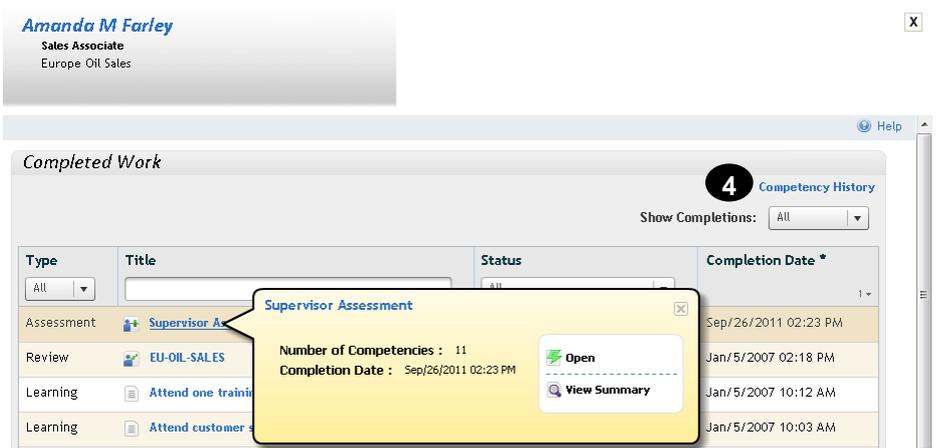


Task D. Supervisor: View Competency History

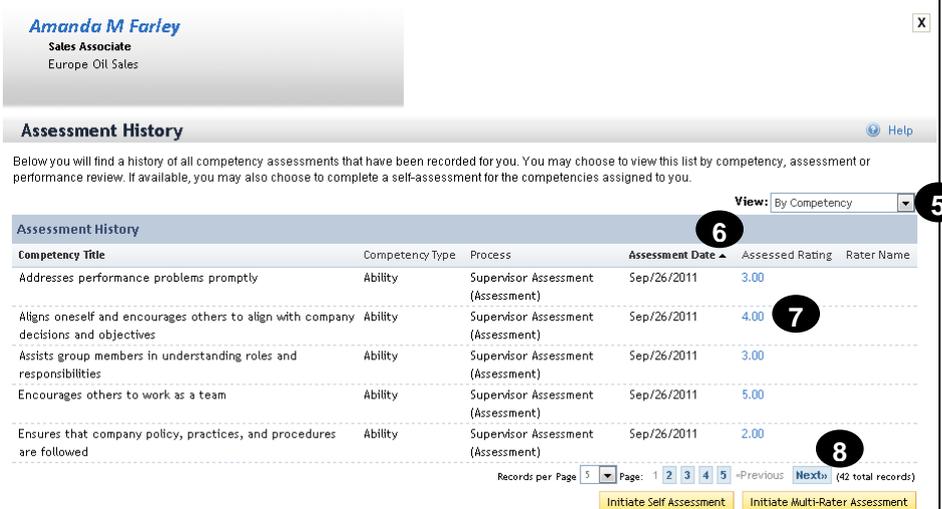
- 1 From the Home page, click the My Employees tab.
  - 2 Click a user's card in the employee tree to load the employee's To-Do List and status pods.
- Note: If you hover on a user's card, you can perform some actions without loading that user's To-Do List.*
- 3 Click the Completed Work pod.



- 4 From the Completed Work page, click the Competency History link.



- 5 From the View drop-down, select how you wish to view completed competencies. For this example, select By Competency.
- 6 Sort the table by column headers, Competency Title or Assessment Date; note the sort arrow (▲).
- 7 Click the Assessment Rating link to view rating criteria details.
- 8 To navigate through multiple pages, select the Next button or click the next page button.



*Note: You can initiate a self-assessment or a multi-rater assessment from this page.*

- 9 From the View drop-down, for this example, select **By Assessment**.
- 10 Click the expand arrow (▼) to view details for each assessment.
- 11 Click the **Assessment Rating** link to view rating criteria details.
- 12 Click the **View** link to see assessment results (similar to previous task).
- 13 To navigate through multiple pages, select the **Next** button or click the next page button.

**Amanda M Farley**  
Sales Associate  
Europe Oil Sales

**Assessment History**

Below you will find a history of all competency assessments that have been recorded for you. You may choose to view this list by competency, assessment or performance review. If available, you may also choose to complete a self-assessment for the competencies assigned to you.

View: By Assessment

Assessment	Date Completed	Action
Self Assessment	Jan/4/2007	<a href="#">View</a>

Competency Description	Competency Type	Assessed Rating
Aligns oneself and encourages others to align with company decisions and objectives	Ability	5.00
Assists group members in understanding roles and responsibilities	Ability	3.00
Encourages others to work as a team	Ability	6.00
Ensures that company policy, practices, and procedures are followed	Ability	2.00
Entry level skills for sales department	Skill	4.00

Records per Page: 5 Page: 1 2 «Previous Next» (8 total records)

► Sales Entry Level Core Assessment 2007 Jan/4/2007 [View](#)

► Supervisor Assessment Sep/26/2011 [View](#)

[Initiate Self Assessment](#) [Initiate Multi-Rater Assessment](#)

- 14 From the View drop-down, for this example, select **By Performance Review**.
- 15 Click the expand arrow (▼) to view details for each review.
- 16 Click the **Assessed Rating** link to view rating criteria details.
- 17 Click the **View** link to see the performance review.

**Amanda M Farley**  
Sales Associate  
Europe Oil Sales

**Assessment History**

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View: By Performance Review

Performance Review	Date Completed	Action
EU-OIL-SALES	Jan/5/2007	<a href="#">View</a>

Competency Description	Competency Type	Assessed Rating
Addresses performance problems promptly	Ability	3.00
Aligns oneself and encourages others to align with company decisions and objectives	Ability	5.00
Assists group members in understanding roles and responsibilities	Ability	2.00
Encourages others to work as a team	Ability	4.00
Ensures that company policy, practices, and procedures are followed	Ability	2.00

Records per Page: 5 Page: 1 2 3 «Previous Next» (11 total records)

[Initiate Self Assessment](#) [Initiate Multi-Rater Assessment](#)