

VU Amsterdam annual consultations – manual

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Version 4, February 2026

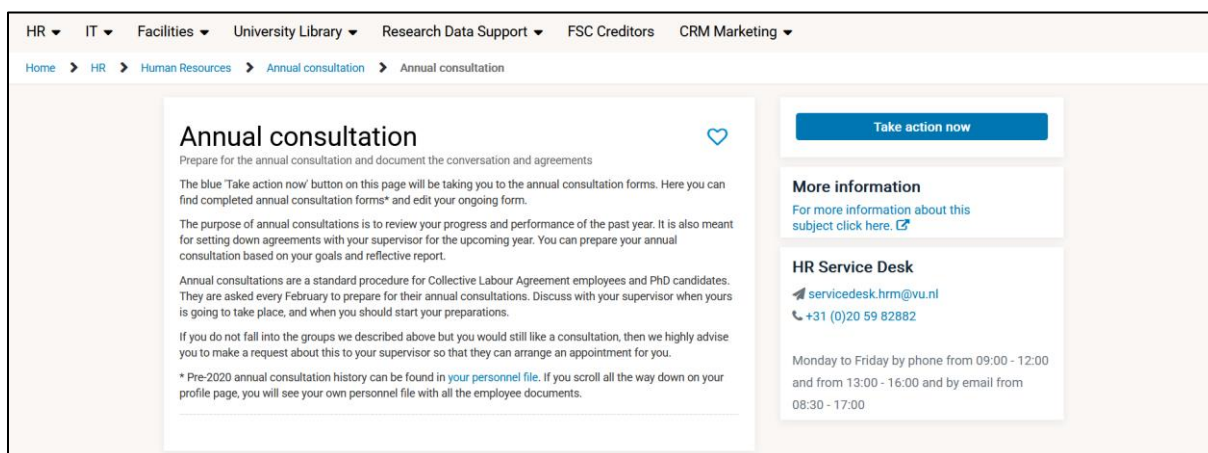
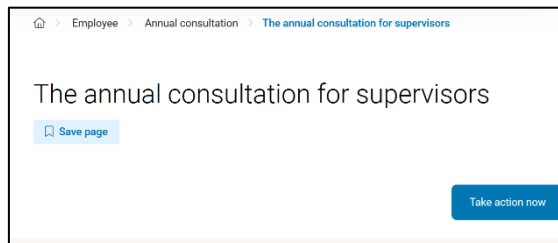
If any topics have been omitted or if you find any inaccuracies in this manual, please send an email to k.j.m.vander.heijden-lek@vu.nl. If you have any questions about the annual consultation process or if you have any problems in relation to it, please contact the HR Service Desk at servicedesk.hrm@vu.nl.

1. Introduction

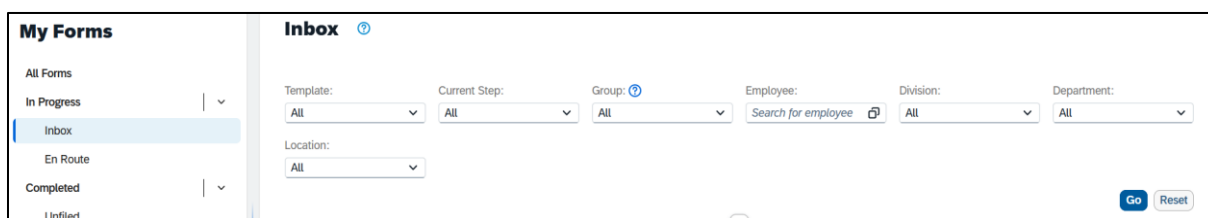
This manual describes the annual consultation form support process. You can find more details about annual consultations at VU.nl. This page will take you to an explanation for [managers](#) and [employees](#), and information about training courses, etc.

The annual consultation process is one of VU Amsterdam's self-service processes. There are various ways of activating it:

- Via the [annual consultation page for managers](#) at VU.nl. Click on the Take action now button to go to the Annual consultation tile in the [service portal](#). Here you will find more details about the annual consultation, such as Quick Reference Cards (QRCs) and other instructional materials.
- If the service portal has already been activated, search for annual consultation or click on HR service area, and then on annual consultation.



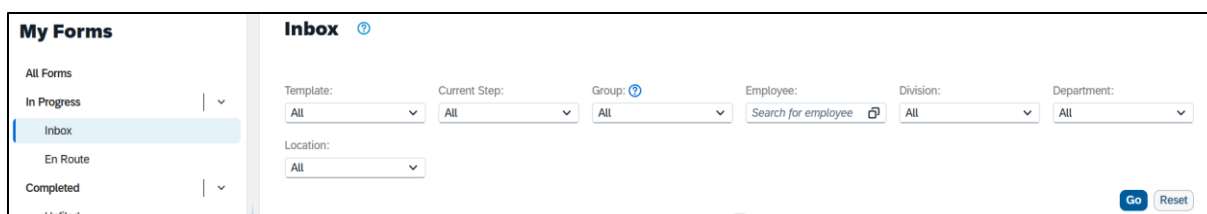
From the page Annual Consultation, the Take action now button takes you to the home screen for the annual consultation: Performance documents.



From the HR > Annual consultation page, information is also available about other performance topics, such as the setting up of performance goals and development goals or asking for feedback.

2. Starting annual consultations (automatically)

- Every year on 1 February, employees automatically receive a task to activate the annual consultation. The task is sent to all employees who are employed on 1 January.
- The form is now with the employee for the first step: employee input. For the manager, the form is in the post box En route. As soon as the employee has finished the first step, the manager gets notified of this and the form becomes visible in the manager's Inbox.



The screenshot displays the 'My Forms' interface. On the left, a sidebar lists categories: 'All Forms', 'In Progress', 'Inbox' (highlighted), 'En Route', 'Completed', and 'Unfiled'. The main area is titled 'Inbox' and contains several filter dropdowns: 'Template:' (set to 'All'), 'Current Step:' (set to 'All'), 'Group:' (set to 'All'), 'Employee:' (with a 'Search for employee' button), 'Division:' (set to 'All'), and 'Department:' (set to 'All'). There is also a 'Location:' dropdown set to 'All'. At the bottom right, there are 'Go' and 'Reset' buttons.

- The automatic task is sent to all employees with whom the annual consultation is mandatory. Employees who are excepted from this are, for example, employees with a small appointment (smaller than or equal to 0.2 fte), interns, student assistants and on-call workers. Of course, the manager can have an annual consultation with these employees: then follow the instructions for activating the annual consultation manually.
- Employer and employee plan the annual consultation together. This happens outside the system and not in SuccessFactors. The employee can activate the annual consultation form and start the preparation at any time.

3. Activating the annual consultation (manually)

- As mentioned in the previous chapter, via Performance documents the manager can manually start a new form. This is only necessary if employees have not received an automatic task.

The screenshot shows the Vrije Universiteit Amsterdam Performance documents interface. The top navigation bar includes the VU logo, 'Performance documents', and a search bar. Below the navigation bar, there are two main sections: 'My Forms' and 'All Forms'. The 'My Forms' section has a sidebar with 'All Forms', 'In Progress', 'Inbox', 'En Route', and 'Completed'. The 'All Forms' section has a filter bar with dropdowns for Template, Current Step, Group, All or Reports Only, Employee, and Division. A 'Go' button and a 'Reset' button are also present. At the bottom right, a 'Create Form' button is highlighted with a red box.

- Click on Create form, choose the annual consultation form and select the employee. After this, you see a screen with evaluation dates, which may be confusing: these dates do not concern the period you cover in the annual consultation, but they are the start and end date of the calendar year in which the form is started. We can't hide the screen and the dates are not adjustable, unfortunately. You can bypass it easily, by clicking on: Create.
- The form is now with the employee for the first step: employee input. For the manager, the form is in the post box En route. As soon as the employee has finished the first step, the manager gets notified of this and the form becomes visible in the manager's Inbox.

4. Team Overview for managers

The tab Team Overview provides the manager with insight into the actions for all open forms for team members, so for whom there is a form and what the status is (in which step is the form).

From this Team Overview, the manager can open a form or start an extra action, such as asking feedback about an employee in the annual consultation process. For more explanation, see the chapter Asking for feedback as a manager.

The screenshot shows the 'Team Overview' tab for the '2024 annual consultation'. The interface includes a search bar, a list of team members, and a table with columns for 'My Team', 'Feedback from Others', 'Employee input', 'Manager input', and 'Annual consultation'. The 'Annual consultation' column shows a checkmark for each team member.

My Team	Feedback from Others	Employee input	Manager input	Annual consultation
		✓	✓	✓

The screenshot shows the 'Teamoverzicht' tab for the '2021 jaargesprek'. The interface includes a list of team members and a table with columns for 'Mijn team', 'Feedback vragen', 'Input medewerker', 'Input leidinggevende', and 'Jaargesprek'. The 'Input medewerker' and 'Input leidinggevende' columns show 'In uitvoering' for each team member.

Mijn team	Feedback vragen	Input medewerker	Input leidinggevende	Jaargesprek
 Anna Bruinsma	Om feedback vragen Nu aanbevolen	In uitvoering		
 Pieter de Post	Om feedback vragen Nu aanbevolen	In uitvoering		

> [Verbeterplan](#)
Klap uit om alle teamleden te zien.

5. Main screens

The annual consultation process has a few main screens with a range of options for managers and employees. Details about these screens are given below. Specific sections are explained in the chapters below, such as that on making a new form.

Performance documents: Forms

The home screen for the annual consultation is Performance documents. Employees are guided to this page from the annual consultation pages at VU.nl and the service portal. For managers, the screen has two tabs: Forms and Team Overview. Employees only have the tab My forms. Employees have fewer options – they cannot create a new form, for example.

The image displays two screenshots of the 'Performance documents' interface. Both screenshots show a sidebar on the left with 'My Forms' and a main content area. The top screenshot shows the 'All Forms' view, and the bottom screenshot shows the 'Inbox' view. Both views include a search bar at the top right and a 'Go' button at the bottom right. The filters in both views are: Template: All, Current Step: All, Group: All, All or Reports Only: All Employees (top) / My Direct Reports (bottom), Employee: Search for employ..., and Division: All.

- Using the Make a new form button, managers can activate two forms:
 - the annual consultation form (as explained in the chapter Activating the annual consultation (manually))
 - The improvement plan, for employees for whom an improvement process is to be activated. For more information on this, please go to VU.nl or the service portal.
- All forms can be found in the mailboxes under Performance Documents:
 - Inbox: every form that can be edited by managers, such as the annual consultation at the Manager input stage.
 - En Route: every form that is with another participant in the process, such as the annual consultation at the Employee input stage.
 - Completed: all completed forms. These forms can no longer be edited.
 - The display options can be used to simplify or expand the overview, by hiding or adding columns.

The annual consultation form

The annual consultation form is a document to be completed by both employee and manager together. It contains the preparations, the subjects to be discussed, the goals drawn up by the

employee, and a reflection on various topics. The completed form is the report of the annual consultation.

The form passes through various stages. These stages are shown on the roadmap (see the next chapter for more details on each stage). Basic information about an employee, such as their manager and position, can be retrieved from the employee profile.

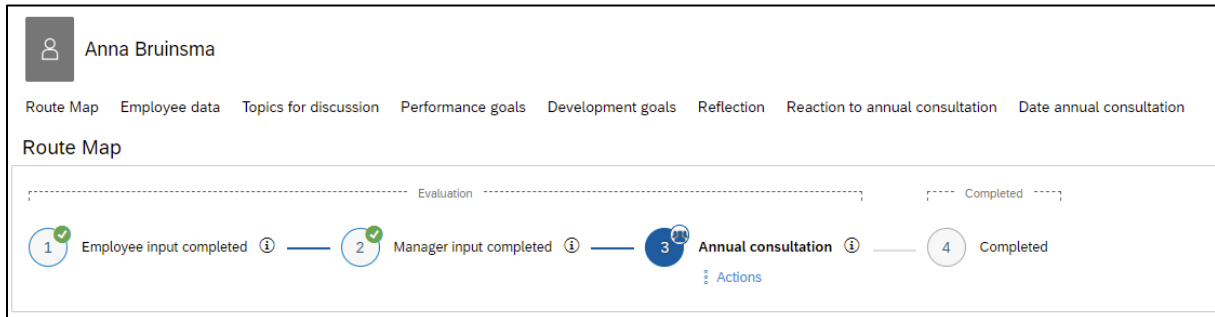
The screenshot shows the VU ACC Performance documents interface. At the top, there's a header with the VU ACC logo and a search bar. Below the header, the user is logged in as 'Monique Wevers'. The main content area is titled '2021 annual consultation for Monique Wevers'. It features a 'Route Map' section with a progress bar showing four stages: 1. Employee input (completed), 2. Manager input (in progress), 3. Annual consultation (pending), and 4. Completed (pending). Below the route map, there's an 'Employee data' section with a table containing the following information:

Field	Value
First Name	Monique
Manager	Paul Kleingeld
Title	
Last Name	Wevers
Department	Services (50038830)
Hire Date	01/03/2021

Below the employee data, there's a 'Topics for discussion' section with a text area for input. At the bottom, there's an 'Input employee' section with a rich text editor.

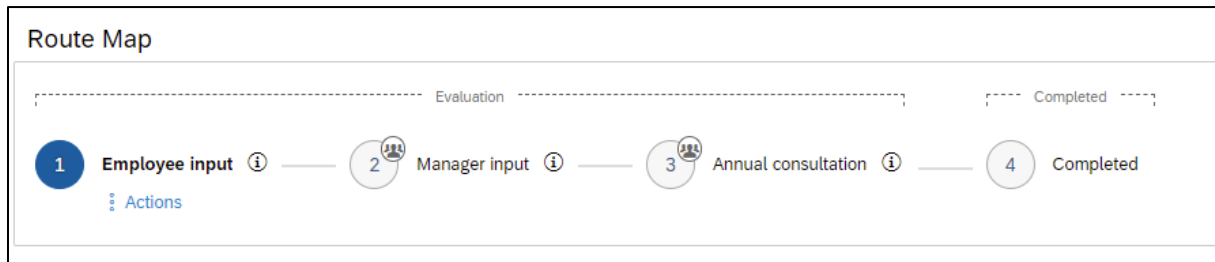
6. Roadmap and stages in the annual consultation process

The roadmap below shows the stages through which the annual consultation form progresses. The roadmap is visible at the top of the annual consultation form during each stage.



- Stage 1: employee input. After the task has been activated, the employee can provide their input. The manager does not yet have access to the form. The employee moves the form forward to stage 2.
- Stage 2: manager input. The manager is now able to view the employee's input and to add their own input. The manager's input is not yet visible to the employee. The manager moves the form forward to stage 3.
- Stage 3 – annual consultation. All the input is now visible to the employee and manager alike. The manager decides when the form is moved forward to this stage – either before or after the actual annual consultation. The manager is still able to edit their own input. The employee is only able to read all the input and add a response.
- Completed: the form is finalised and archived in the Completed file.
- A green tick means that a stage has been concluded. The current stage is indicated with a blue circle. The symbol featuring several figures in the top-right hand corner in the stage number indicates that more than one colleague is working on that stage at the same time. At stage 2, for example, the manager can add input, and so can a co-manager. In stage 3, the manager can edit the form and the employee can give a response.

7. Stage 1: employee input



- In the first state, the employee can provide input by entering their responses in the following fields:
 - Topics for discussion in annual consultation
 - Performance goals
 - Development goals
 - Reflection on other topics

Explanatory notes can be found above the fields. The employee can upload documents using the paper clip in the top-right hand corner (see Chapter 14 for more options).

VU ACC Performance documents ▾

[Reviews](#) [Team Overview](#)
[Back to: Inbox](#)

2021 annual consultation for Monique Wevers

Monique Wevers

[Route Map](#) [Employee data](#) [Topics for discussion](#) [Performance goals](#) [Development goals](#) [Reflection](#)

Route Map

```
graph LR; subgraph Evaluation; 1((1)) --> 2((2)); 2 --> 3((3)); end; subgraph Completed; 3 --> 4((4)); end; 1 --- 2 --- 3 --- 4; 1 --- Actions[Actions];
```

Employee data

First Name	Monique	Last Name	Wevers
Manager	Paul Kleingeld	Department	Services (50038830)
Title		Hire Date	01/03/2021

Topics for discussion

In the space below, please indicate which topics you wish to discuss during the annual consultation. For example: your development, work load, social safety, changes in your ancillary activities or working conditions.

Input employee

B *I* U | Size ▾ |

Performance goals

- If performance goals and development goals have been activated, then they will be automatically visible on the annual consultation form. Details of the targets/goals can be seen using the Expand option or '>'. The activation of performance goals and development goals is explained elsewhere in this manual.

Performance goals

Describe your progress towards achieving your performance goals in the past period. What went well, what did not go well and what does this mean for the coming period? Which agreements would you like to make for the coming period? Which forms annual consultation, include any changes or new goals in Performance goals.

As a manager (or co-manager), you may provide a reaction to the employee's goals and input. The input field can also be used to document changes and new goals. After this annual consultation, the employee will include this in Performance goals.

[Expand All](#) [Collapse All](#)

> Performance doel B

Input employee

B *I* U | | | Size

- The employee stores the form by clicking on the Save and close button (at the bottom of the form). The form remains in the employee's Inbox and can still be edited.
- Using the Complete employee input button, the annual consultation form is sent onto the next stage (manager input). The employee may also send a separate accompanying message for their manager. The form moves from the employee's IN box to En route.

VUw ACC Performance documents

Search for actions or people...

My Forms

All Forms
In Progress
Inbox
En Route
Completed

Items per page 10 | Page 1 of 1 | Showing 1-1 of 1

Display Options

☒ Form Title ☒ Employee ☒ Step ☒ Currently With ☒ Step Due Date ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Last Modified

Form Title	Employee	Step	Currently With	Step Due Date	Form Start Date	Form End Date	Form Due Date ↑	Last Modified	Action
2021 annual consultation for Anna Bruinsma	Anna Bruinsma	Manager input	Monique Wievers		21/01/2022	20/02/2022	20/02/2022	21/01/2022	

Items per page 10 | Page 1 of 1 | Showing 1-1 of 1

- In the next stage, the manager provides input and the employee cannot edit the form. However, the employee can still view their own input on the form in the En route box.

8. Stage 2: manager input

Route Map



- Once the employee has completed the first stage, the form is sent on to the manager. The manager receives an email as soon as the form is available. The task can be found in the list of tasks and the form will be visible in the Inbox. The form can be opened through the message, the task, or by clicking on the title of the form.

My Forms

All Forms

In Progress

Inbox

En Route

Completed

Unfiled

Inbox

Template: All

Current Step: All

Group: All

Employee: Search for employee

Division: All

Department: All

Location: All

Go Reset

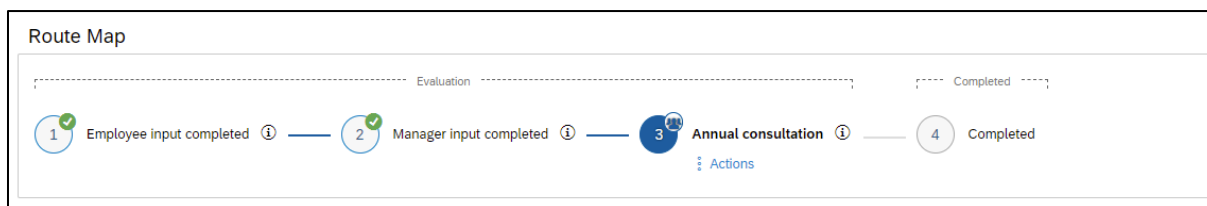
- The manager can read the employee's input during this stage and provide input in the fields intended for the manager.
- Using the Save and close button (at the bottom of the form), all the input is stored and the form remains at the current stage (manager input). The manager's input is not yet visible to the employee.
- Using the Complete manager input button, the form is sent onto the next stage (annual consultation). From this stage, the manager's input is also visible to the employee. The manager may elect to share their input with the employee before or after the annual consultation. In the next stage (annual consultation), the manager is still able to edit their own input.

Reminder

You are about to release this form for the annual consultation. The employee will be able to view all input. If this is not your intent, do not complete this step until after the annual consultation. In that case, select 'Cancel' and then 'Save and close'.

Cancel OK

9. Stage 3 – annual consultation



- All the input is now visible to the employee and manager alike, and to any co-manager. The manager can decide when the form should progress to stage 3 – either before the annual consultation, so that the employee can read the input before the interview, or after it, which means the manager can edit their input before the employee gets to see it.
- Both manager and employee can access the form via their Inbox. The manager is still able to edit their own input. The employee can read the input and add comments, such as an addition to the report.

Reaction to annual consultation

This space may be used for adding reactions from the employee and managers (e.g. an addition to the report or a comment about the consultation). If you do not wish to add a reaction, enter 'Not applicable', so that the form can be completed.

Input manager

B I U | | | | | | | | Size ▾

- The manager enters the date on which the annual consultation took place. If an annual consultation was timetabled but has not taken place, the manager can state the reason at this stage.
- Once the form has been filled in completely and the employee has had an opportunity to read and respond to the report, the manager definitively closes the form using the Finalise form button.

10. Stage 4: completed

My Forms

All Forms
In Progress
Inbox
En Route
Completed
Unfiled

Unfiled

Template: All Group: All Employee: Search for employee Division: All Department: All Location: All Go Reset

Forms (4)

Title	Employee	Form Start Date	Form End Date	Form Due Date	Completed
2022		01/09/2022	01/10/2022	01/10/2022	2
2023		01/01/2023	31/12/2023	01/07/2024	2

- Once the annual consultation form has been concluded, it can no longer be altered. It will be stored under Forms, in the Completed folder. After the retention period has elapsed (five calendar years after the creation of the form), the form will be deleted. The forms are no longer automatically stored in employees' personal files.
- When an employee gets a new manager, completed annual consultation forms are made automatically visible to the new manager.

11. Talent flags

For academic staff at the assistant professor level and above, the academic focus domain (research, education or impact) is discussed. After the annual consultation, the manager registers the choice of a focus domain, or a change of domain, in the employee's profile. This happens through a Talent flag in the section Talent Profile.

The manager can register and change a Talent flag. The employee can see the Talent flag, but not edit. Registering a focus domain through a Talent flag by the manager works as follows:

- In SuccessFactors, go to your employee's profile and click Talent Profile.
- In the Talent Profile, you see a number of Talent flags. Click on the pencil next to the title Talent flags to register or edit a talent flag. Click on the arrow next to the title Academic focus domain and select the right focus domain: Research, Education or Impact. Be aware, the option Care is only for ACTA. Click Save.

There is one more Talent flag: managerial level. This Talent flag will be introduced later in 2025/2026, we will communicate about this later.

12. Co-manager

Annual consultations are conducted between an employee and their manager. In some cases, an employee is managed by a different manager in relation to some of their duties for some of the time, and for a longer period of time. If the immediate manager has an insufficient picture of the employee's performance for the relevant aspects of their duties, then the co-manager may be given a role in the annual consultation process. The co-manager will have access to the annual consultation form and can give input.

The co-manager will have access to the annual consultation form if they have been included as a matrix relation in position management. More information about this is available in the Quick Reference Cards for managers in the service portal. Requests for the creation of a matrix relationship can also be submitted to the HR Service Desk.

Bear in mind that a matrix relationship, once created, continues to exist until it is actively deleted. Whenever anyone moves to a different position in the organisation, there is a risk of errors in matrix relationships. Before activating annual consultations, you should therefore always verify that matrix relationships are up to date in the employee's profile. Before creating a matrix relationship, always consider whether it is really necessary: in some cases, the input of the co-manager can be included by asking for feedback via the Team overview.

Options and points for attention for the co-manager:

- The co-manager gains access to the annual consultation form in stage 2 – manager input. The manager and co-manager can provide input at the same time.
- Only the manager can progress the form from stage 2 to the next stage.
- From stage 3, the co-manager is able to view the form but is no longer able to make any changes to it.
- The co-manager has no access to the input from the employee and manager about the employee's development goals. The development goals cover a longer period and concern work duties that extend beyond those that involve the co-manager.

13. Performance goals and development goals

The screenshot shows the 'Performance goals' section of the VU ACC system. At the top, there's a user profile for 'Monique Wevers' and a 'Performance goals' dropdown menu. A search bar is located at the top right. Below the header, there's an 'Introduction' section with instructions on how to use the SMART wizard. A table titled 'Current (Count:1)' lists performance goals. The table has columns for 'Goal Name', 'Metric', 'Status', and 'CPM Achievements'. One goal is listed: 'Performance doel B' with a status of 'On Target' and 0 achievements.

Goal Name	Metric	Status	CPM Achievements
Performance doel B	Evaluate	On Target	0

- Performance goals are agreements between the employee and manager for the forthcoming period (usually one year); what targets will the employee be working to meet, what results are expected of them? It is important to describe performance goals as accurately as possible. When has the target been reached, is it measurable, when should the target have been reached?
- Development goals are agreements between the employee and manager for a period that may extend beyond the forthcoming year. These agreements concern the employee's development progress and the activities they carry out in order to develop in a particular direction. Development goals, too, should be described as accurately as possible.
- The employee can create and edit performance goals and development goals themselves using the Performance goals and development goals options menu. They can be found by following the annual consultation links, or by searching in the annual consultation in the service portal, or by entering performance goals or development goals as search terms.
- The targets/goals are automatically inserted in the annual consultation form. Both the employee and the manager can respond to the targets/goals on the annual consultation form. The employee can bring the targets/goals up to date after their annual consultation. They can also be adjusted in the meantime if necessary, if the employee and manager agree.
- For more information, see the Manual Performance goals.

14. Asking for feedback (manager)

- During the annual consultation process, the manager can ask for feedback about an employee via the Team overview in Performance documents.

VU ACC Performance documents ▾				
Reviews Team Overview				
2021 annual consultation				
▾ 2021 annual consultation				
My Team △ ?	Feedback from Others ?	Employee input	Manager input	Annual consultation
 Anna Bruinsma	Ask for Feedback Recommended Now	✓	Review Anna	
 Aziz Baroudi	Ask for Feedback Recommended Now	In Progress		
 Pieter de Post	Ask for Feedback Recommended Now	In Progress		

- Click on Ask for feedback. Select any of the preselected employees, look for another VU employee, or enter an e-mail address yourself. The standard e-mail text may be modified. Click on Send e-mail.

Ask for Feedback about Anna Bruinsma

 Send an email to 3-5 people and we will show their feedback with the performance review forms

☒ Add existing employee

☐ Add external Email address

Or select from the following recommended list

 A Bosch

 ABC XYZ

 Aziz Baroudi

 Bertine van Leeuwen

 Campbelleke Noami

People:

Message:

Dear colleague,
In preparation of the annual consultation, I would like to request your feedback on your work with Anna Bruinsma. What are Anna Bruinsma's strong sides and where do you see room for improvement?
I would like to receive your feedback before 21/04/2022, so I can take it into account during the annual consultation.

Cancel

Send email

- The person from whom you are asking feedback receives the e-mail. Feedback can be given by replying to the e-mail and typing the feedback as part of the message.

Verzenden

Aan feedbackstichtingv@productseupr.successfactors.eu

CC

Onderwerp Notificatie: Request for feedback

Typ your feedback here. After sending, the feedback will be visible in the text balloon in the upper right corner of the annual consultation form.

~~~~~Klik op Beantwoorden en typ de feedbacktekst~~~~~

DIT IS EEN TEST

- After being sent, the text in the e-mail is linked to the annual consultation form. Feedback can be found under the conversation icon in the top-right hand corner of the form. The number shows how many colleagues have given feedback.

Actions

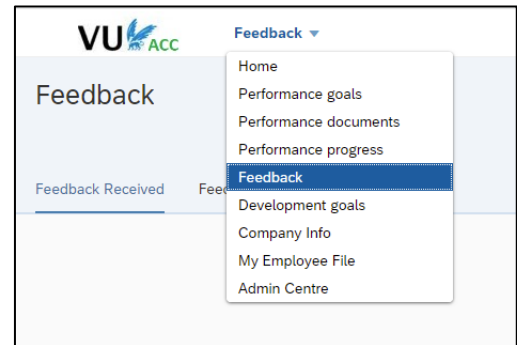
0 0

Supporting

- Feedback that has been given can be seen by the manager from the Manager input stage. When feedback has been given, it is visible to the employee at the Employee input stage, but not yet to the manager.

## 15. Asking for feedback (employee)

- Employees can ask for feedback at any time of the year, separately from the annual consultation, using the Feedback option.
- Click on the Ask for feedback button in the top-right hand corner.

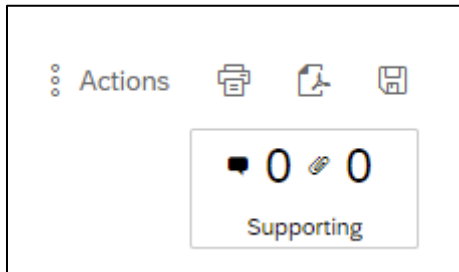


- Select the person being asked to provide feedback, enter a subject, and adjust the questions if necessary.
- Feedback that has been received can be linked to the goals/targets. For further information, please see the Feedback topic in the service portal.
- Feedback cannot be automatically linked to the annual consultation. There are two ways of making feedback available for the annual consultation:
  - By making it visible to the manager, then the manager can see it under Feedback.
  - By copying and pasting it, and by adding it as an attachment.

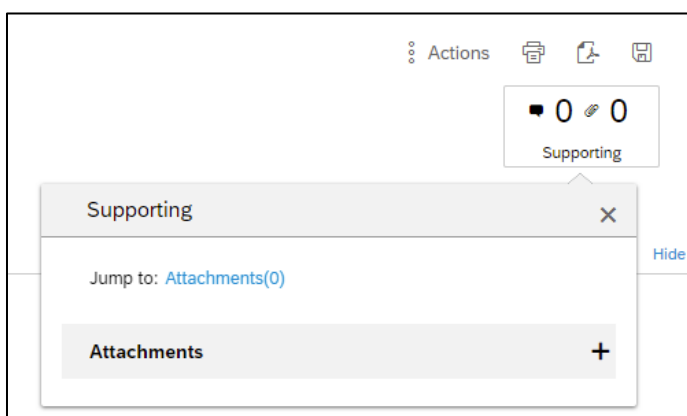
A screenshot of the 'Request Feedback' form. It includes a 'Select people' section with a search bar and a list of people (Monique Wevers). Below this is a section to 'Enter a topic and at least one question', with a 'Feedback Topic' field and three numbered questions: 'What went well?', 'What could I improve on?', and 'Any additional comments?'. Each question has a pencil icon for editing. At the bottom right are 'Send' and 'Cancel' buttons.

## 16. Options: printing, PDF, reading the feedback, and adding attachments

A number of support options are available in the top-right hand corner of the annual consultation form:



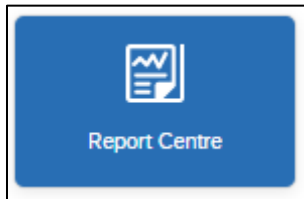
- System information about the form can be found under Actions, such as details about the route the form has taken.
- The print icon can be used to print the annual consultation form.
- The PDF icon can be used to create a PDF version of the annual consultation form.
- The disk icon can be used to store the form, at any time.
- A text balloon is located above Supporting, on the left. The feedback can be found under this balloon if it has been requested by the manager using the Team overview (see Asking for feedback by the manager, elsewhere in this manual). The number indicates how often feedback has been given.
- A paper clip symbol can be found near Supporting, to the right. This can be used for adding or viewing an attachment. Click on the plus symbol to add an attachment. The number shows how many attachments have been added. Both the employee (stage 1 and 3) and the manager (stage 2 and 3) can do this.



## 17. Report Annual Consultation

A report Annual Consultation has been developed for managers that allows you to understand the status of forms. This is report HR306 - Annual Consultation in the SuccessFactors report center. With this report, you can monitor which process step a form is in and how many forms have been completed. This is shown both by manager (for direct and indirect reports) and by organizational unit.

The report center can be accessed through the [service portal](#), or within SuccessFactors by clicking on the tile Report Centre:



Or by choosing 'Reports' from the drop-down menu:

