

# Continuous Performance Management (CPM)

## Comprehensive Planning and Evaluation Guide For Supervisors



STATECIVILSERVICE

SAP SuccessFactors



---

## TABLE OF CONTENTS

|                                                            |    |
|------------------------------------------------------------|----|
| Table of Contents.....                                     | 2  |
| SCS Chapter 10.....                                        | 5  |
| Overview .....                                             | 5  |
| Performance Planning – SCS Rule 10.5 .....                 | 5  |
| Performance Evaluation Ratings - SCS Rule 10.6 .....       | 6  |
| Performance Evaluation Sessions – SCS Rule 10.7.....       | 7  |
| Effects of a Needs Improvement Rating – SCS Rule 10.8..... | 7  |
| Effects of an Unsuccessful Rating – SCS Rule 10.9.....     | 8  |
| Performance Management Calendar.....                       | 9  |
| Performance Management Basics .....                        | 10 |
| Performance Management Happens Throughout the Year .....   | 10 |
| Connecting Performance to the Agency Mission.....          | 11 |
| Performance Management Forms.....                          | 11 |
| Navigating your Dashboard .....                            | 12 |
| Navigation Basics.....                                     | 13 |
| Using Manage My Team.....                                  | 14 |
| Viewing and Creating Reminders .....                       | 15 |
| Mobile Activation .....                                    | 19 |
| How to Change your Accessibility Settings .....            | 21 |
| Continuous Performance Management Planning .....           | 24 |
| Understanding the CPM Planning Route Map .....             | 25 |
| Understanding Goals.....                                   | 26 |
| Writing Goals .....                                        | 26 |
| 5 Steps for Writing CPM SMART Goals .....                  | 27 |
| Writing Metrics.....                                       | 28 |
| Sample Goals and Metrics .....                             | 29 |
| Goal Fields .....                                          | 30 |
| Categories of Goals .....                                  | 31 |
| Working in the Goal Plan.....                              | 33 |
| How to Access a Goal Plan.....                             | 33 |
| Goal State: Unapproved vs Approved .....                   | 36 |
| Adding Goals Through the Goal Plan.....                    | 37 |

|                                                                                 |     |
|---------------------------------------------------------------------------------|-----|
| How to Copy Goals from Previous Goal Plan .....                                 | 39  |
| How to Create a Goal from Scratch .....                                         | 43  |
| How to Create Goals from the Library .....                                      | 47  |
| Goal Plan – Editing and Deleting Goals .....                                    | 53  |
| Working in your Performance/My Forms Page .....                                 | 54  |
| Navigating your Performance / My Forms Page .....                               | 54  |
| Using Team Overview .....                                                       | 58  |
| Understanding the Performance Planning Form .....                               | 60  |
| Adding Goals to the Performance Planning Form .....                             | 66  |
| How to Create a Goal from Scratch .....                                         | 68  |
| How to Create Goals from the Library .....                                      | 72  |
| Moving the Form to the 2 <sup>nd</sup> Level Evaluator .....                    | 79  |
| Meeting with your 2 <sup>nd</sup> Level Evaluator .....                         | 81  |
| Planning - 2 <sup>nd</sup> Level Evaluator's Role .....                         | 82  |
| 2 <sup>nd</sup> Level Evaluator – Reviewing the Performance Planning Form ..... | 82  |
| 2 <sup>nd</sup> Level Evaluator – Planning Not Approved .....                   | 84  |
| 2 <sup>nd</sup> Level Evaluator – Planning Approved .....                       | 85  |
| Conducting the Planning Discussion .....                                        | 86  |
| Supervisor Planning Discussion Preparation Checklist .....                      | 86  |
| Before the Discussion .....                                                     | 86  |
| During the Discussion .....                                                     | 86  |
| After the Discussion .....                                                      | 87  |
| Supervisor -Documenting the Planning Discussion .....                           | 88  |
| Employee - Signing the Planning Form .....                                      | 92  |
| Managing Performance Throughout the Year .....                                  | 94  |
| Documentation Best Practices .....                                              | 95  |
| Continuous Performance Evaluation .....                                         | 96  |
| Rating Scale Review .....                                                       | 97  |
| Evaluating Your Employee's Goals .....                                          | 98  |
| Performance Evaluation Guidelines .....                                         | 98  |
| A Step-by-Step Process for Evaluating Goals .....                               | 99  |
| Sample Justifications: .....                                                    | 101 |
| Approaches to Evaluating Behavior Goals .....                                   | 102 |
| Completing Performance Evaluation Forms in SuccessFactors .....                 | 103 |

---

|                                                                                             |     |
|---------------------------------------------------------------------------------------------|-----|
| Navigating to Performance Forms .....                                                       | 103 |
| Understanding the Performance Evaluation Form .....                                         | 104 |
| Completing the Performance Evaluation Form .....                                            | 108 |
| 2 <sup>nd</sup> Level Evaluator's Role – Evaluation .....                                   | 114 |
| 2 <sup>nd</sup> Level Evaluator – Reviewing and Approving Performance Evaluation Form ..... | 114 |
| Meeting with your 2 <sup>nd</sup> Level Evaluator .....                                     | 119 |
| Conducting the Evaluation Discussion .....                                                  | 120 |
| Performance Evaluation Sessions – SCS Rule 10.7.....                                        | 121 |
| Supervisor Evaluation Discussion Checklist .....                                            | 122 |
| Before the Discussion .....                                                                 | 122 |
| During the Discussion .....                                                                 | 122 |
| After the Discussion .....                                                                  | 123 |
| Supervisor - Documenting the Evaluation Discussion .....                                    | 124 |
| Employee – Signing the Evaluation .....                                                     | 127 |
| Organizing your Completed Forms .....                                                       | 131 |
| Reports .....                                                                               | 135 |
| Performance Form Status Reports.....                                                        | 135 |

---

## SCS CHAPTER 10

### OVERVIEW

**Continuous Performance Management (CPM)** is a tool used to measure performance and to continuously develop individuals into high-performing employees.

Continuous Performance Management is effective January 1, 2025, and applies to all classified employees except those serving in a classified When Actually Employed (WAE) appointment. The performance evaluation year shall be January 1 through December 31 of each year.

Continuous Performance Management shall consist of a **minimum of the following components**:

1. **A performance planning form approved by the Director which is comprised of a minimum of three goals;**
2. **A performance planning session during which the Evaluating Supervisor and the employee discuss the employee's planned goals for the performance evaluation year;**
3. **A performance evaluation form approved by the Director;**
4. **A performance evaluation session during which the Evaluating Supervisor and the employee discuss the results of employee's planned goals from the performance evaluation year;**
5. **An overall performance evaluation resulting in one of five possible ratings.**

---

### PERFORMANCE PLANNING – SCS RULE 10.5

The Evaluating Supervisor shall prepare a performance planning form at the beginning of each performance evaluation year.

Prior to conducting a performance planning session with the employee, the Evaluating Supervisor shall obtain the Second Level Evaluator's concurrence and signature on the performance planning form.

During the performance planning session, the Evaluating Supervisor shall present and discuss the performance planning form with the employee.

The Evaluating Supervisor shall sign and document the date of the performance planning session. The employee shall be given a copy of or access to the performance planning form. An employee cannot prevent the performance planning form from becoming official by refusing to acknowledge receipt of the form.

A performance planning session shall be conducted during the first two calendar months following:

1. The appointment of a new employee; or
2. The permanent movement of an employee into a position having a different position number with significantly different duties; or
3. The beginning of the new performance evaluation year (no later than March 1).

A performance planning session may be conducted when:

1. The Evaluating Supervisor of an employee changes; or
  2. The Evaluating Supervisor deems a new performance planning session is appropriate.
- 

## PERFORMANCE EVALUATION RATINGS - SCS RULE 10.6

According to SCS Rule 10.6, the Evaluating Supervisor shall assign one of the five ratings listed below based on the employee's overall satisfaction of position requirements. Position requirements include, but are not limited to, performance, behavior, and quality/quantity of work. While consistency is a consideration, an extraordinary outcome or egregious conduct may cause a rating to be **Exceptional** or **Unsuccessful**.

1. **Exceptional**: Consistently exceeds position requirements
2. **Exceeds Expectations**: Occasionally exceeds the position requirements
3. **Successful**: Meets position requirements
4. **Needs Improvement**: Occasionally fails to meet position requirements
5. **Unsuccessful**: Consistently fails to meet position requirements

Supervisors may also assign a **Not Evaluated** rating if:

1. An employee who is appointed on or after October 1 of the performance evaluation year shall be assigned a **Not Evaluated** rating.
2. When an employee transfers between January 1 and March 1, the gaining agency shall be responsible for assigning a rating of **Not Evaluated** to an employee who has not been rated by the losing agency as of the effective date of the transfer.
3. An employee who has actually worked less than 90 workdays during the performance year at the evaluating agency shall be assigned a **Not Evaluated** rating.
4. A **Not Evaluated** rating shall have the same effect as a **Successful** rating.

An **Unrated** rating is assigned:

1. When an evaluation is in violation of these rules, the Human Resources Office shall assign an **Unrated** rating to the employee.
2. In the absence of a performance evaluation, the Human Resources Office shall assign an **Unrated** rating to the employee.
3. An **Unrated** rating shall have the same effect as a **Successful** rating.

## PERFORMANCE EVALUATION SESSIONS – SCS RULE 10.7

Performance evaluations sessions shall be conducted after the performance evaluation year has ended and rendered no later than March 1. All performance evaluation ratings shall be recorded with an effective date of January 1.

The Evaluating Supervisor shall base the evaluation of the employee's performance on the goals as stated on the performance planning form.

To render a performance evaluation, the Evaluating Supervisor shall:

1. Complete a performance evaluation form and session between January 1 and March 1.
2. Sufficiently support the performance evaluation rating with comments and attach supporting documentation as deemed appropriate. In the case of an **Unsuccessful** rating, comments and documentation combined must be sufficient to support the rating, any potential disciplinary action, and apprise the employee of deficiencies in sufficient detail for the employee to provide defense/explanation in an agency review or appeal setting.
3. Obtain the Second Level Evaluator's concurrence and signature on the performance evaluation form prior to discussion with the employee.
4. Discuss the evaluation with the employee. Following the discussion, the Evaluating Supervisor and the employee shall sign indicating the evaluation session occurred.
5. Provide the employee with a copy of or access to the completed performance evaluation form and any supporting documentation.

(An employee cannot prevent the performance evaluation form from becoming official by refusing to attend the performance evaluation session and/or refusing to acknowledge the performance evaluation form. Should the employee refuse to attend the performance evaluation session and/or acknowledge the performance evaluation form, the Evaluating Supervisor shall document the refusal on the performance evaluation form.

---

## EFFECTS OF A NEEDS IMPROVEMENT RATING – SCS RULE 10.8

A performance evaluation rating of **Needs Improvement** is not discipline.

In addition to any other limitations set forth in these rules, an employee who receives a performance evaluation rating of **Needs Improvement** shall not be eligible for:

1. Promotion;
2. Detail to special duty to a higher-level position;
3. Attainment of permanent status;
4. Placement on a DPRL.

An employee who received a performance evaluation rating of **Needs Improvement** in the previous performance evaluation year shall not receive a consecutive rating of **Needs Improvement**.

---

## EFFECTS OF AN UNSUCCESSFUL RATING – SCS RULE 10.9

A performance evaluation rating of **Unsuccessful** is not discipline.

In addition to any other limitations set forth in these rules, an employee who receives a performance evaluation rating of **Unsuccessful** shall not be eligible for:

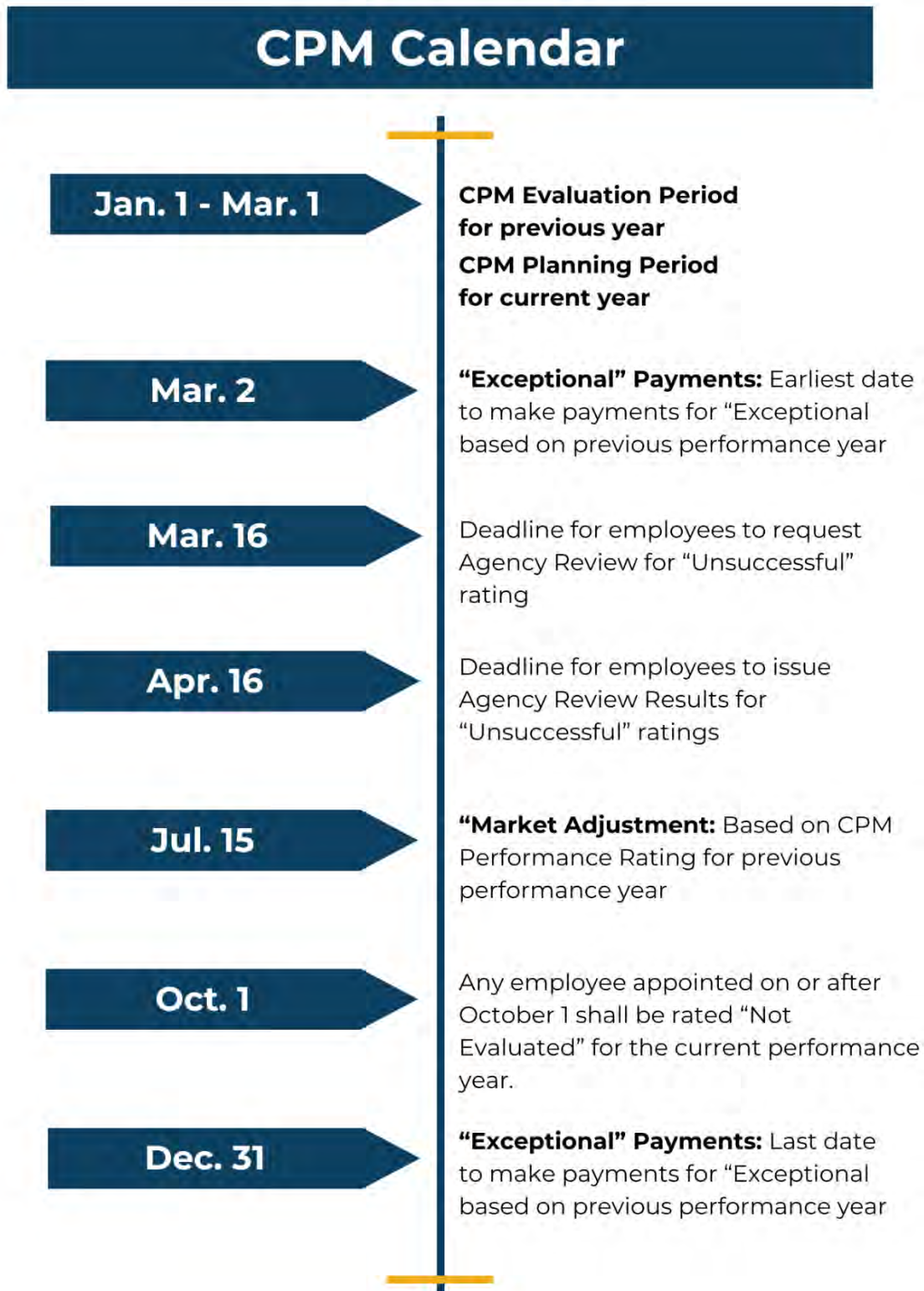
1. Promotion;
2. Detail to special duty to a higher-level position;
3. Attainment of permanent status;
4. Placement on a DPRL;
5. Market adjustment.

A permanent employee who receives a performance evaluation rating of **Unsuccessful** may seek review of that rating in accordance with Rule 10.10.

An employee with a confirmed performance evaluation rating of **Unsuccessful** may be disciplined in accordance with the rules applicable to the employee's status. A rating is not considered confirmed until the agency review process has been completed or the time to request a review has expired.

---

## PERFORMANCE MANAGEMENT CALENDAR



## PERFORMANCE MANAGEMENT BASICS

Performance management is the ongoing process of planning, monitoring, and documenting employee performance throughout the year. It is more than completing a planning form and an annual evaluation. When supervisors assign work, set expectations, provide feedback, recognize good performance, address concerns, coach employees, or evaluate performance, they are managing performance.

Performance management is also a shared responsibility. Supervisors plan, guide, monitor, coach, and evaluate performance. Employees are responsible for tracking their progress, applying feedback, communicating with their supervisor, and taking ownership of their performance and development.

Continuous Performance Management (CPM) provides structure for this process and helps supervisors and employees:

- Establish clear work and behavior expectations.
- Set goals that support employee, work unit, and agency priorities.
- Monitor progress toward established goals.
- Provide timely feedback and coaching.
- Recognize successful performance.
- Address performance or behavior concerns when they occur.
- Support employee development and growth.
- Evaluate performance based on established expectations and supporting documentation.

## PERFORMANCE MANAGEMENT HAPPENS THROUGHOUT THE YEAR

Effective performance management requires regular communication between supervisors and employees. The Planning Discussion and Performance Evaluation Discussion are important parts of CPM, but they should not be the only times performance is discussed.

Throughout the performance year, supervisors should meet with employees to discuss progress toward goals, review supporting documentation, provide feedback, identify challenges, and determine whether additional support or resources are needed. These conversations also give employees an opportunity to ask questions, share concerns, discuss accomplishments, and participate in decisions about their performance and development.

Regular performance discussions make it easier to address issues when they occur instead of waiting until the end of the performance year. They also give employees time to respond to feedback and make adjustments before the formal evaluation.

Performance discussions do not always need to be formal meetings. They may occur during regular one-on-one meetings, project updates, coaching conversations, or other routine interactions. What matters is that supervisors communicate expectations clearly, provide timely feedback, and document performance as appropriate throughout the year.

## CONNECTING PERFORMANCE TO THE AGENCY MISSION

Performance management also helps connect an employee's day-to-day work to the larger goals of the organization. Goals should reflect the employee's responsibilities while supporting the priorities of the work unit, department, or agency.

When employees understand what is expected of them, how their success will be measured, and how their work contributes to the agency's mission, they are better positioned to take ownership of their performance. Supervisors are also better positioned to provide meaningful feedback, recognize contributions, address concerns, and make fair performance decisions.

---

## PERFORMANCE MANAGEMENT FORMS

All performance management forms are launched by your Agency Administrator. Once a form is launched, only the Agency Administrator can delete the form or launch a new form.

The Performance Management process requires the completion of 2 forms during the performance year: the **Performance Planning Form (or New Appointment Planning Form)** and the **Performance Evaluation Form**.

Goals can be added either directly to the Performance Planning Form or to the Goal Plan. After they have been added, goals will appear on the Performance Planning Form and the Goal Plan. These goals will automatically be added to the Performance Evaluation form.

As long as the Goal Plan is UNAPPROVED, you, as a supervisor, can edit the Goal Plan, which includes adding goals, editing all goal fields, and deleting goals.

Once the 2<sup>nd</sup> Level Evaluator approves the planning form, the Goal Plan State is **Approved**. This means the form is locked and goals cannot be edited, added, or deleted.

If the form is returned to the Evaluating Supervisor, the Goal Plan State returns to **Unapproved**. The form is unlocked and may be edited.

---

## NAVIGATING YOUR DASHBOARD

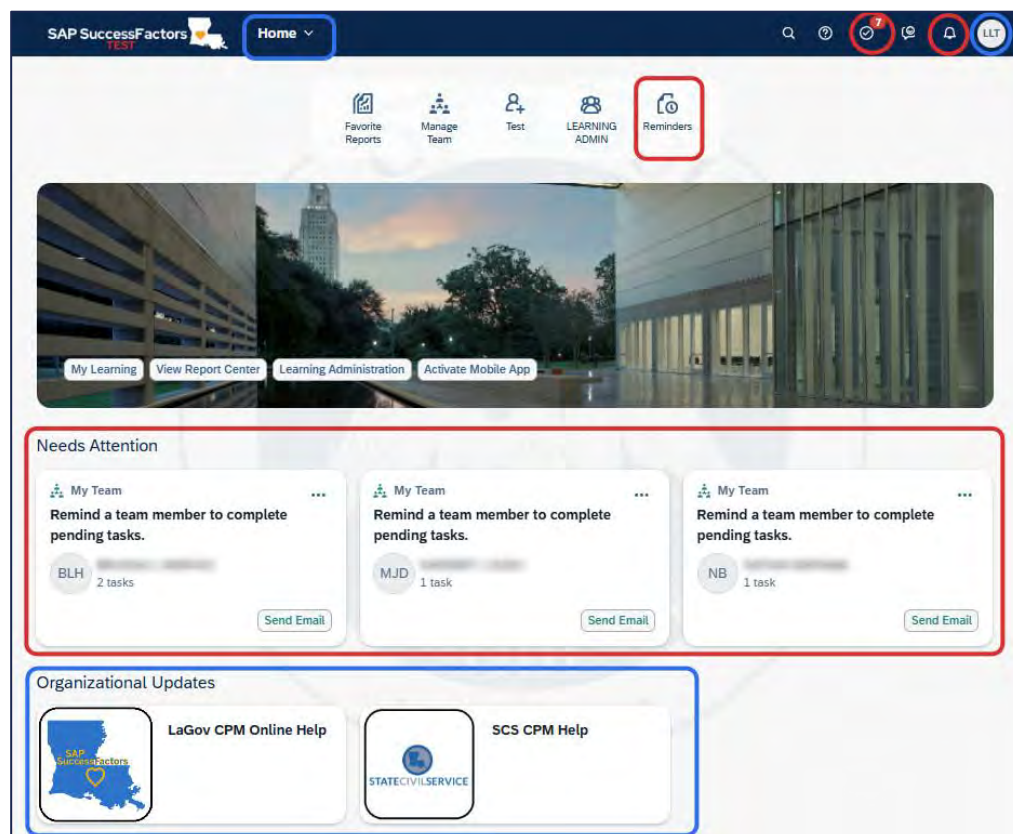
When you log into **SuccessFactors (SF)**, your dashboard may have these features. Your **Home** menu may not have all of the options listed here. Your menu and access rights are based on your roles and responsibilities within your agency.

The items noted by **blue outlines** are navigation options. These include:

- **Main Menu / Home** – This is a drop-down menu that will allow you to navigate to your designated sub tabs. (See Settings to change navigation.)
- **User Icon / Account** – Selecting here will allow you to see your account information and change your settings.
- **Organizational Updates** – Selecting here will open CPM related resources.

SuccessFactors has multiple tools to notify you of items that may need your attention as noted by the **red outlines**. These include:

- **To-Do List** – Select here to see a list of tasks and timelines for completion. You can navigate to the items directly from the To-do List.
- **Notifications** – Select here for notifications. You must configure this in Settings or you will receive your notifications via email.
- **Reminders** – Select here to view reminders for tomorrow.
- **Needs Attention** – This area displays tasks you could work on today.

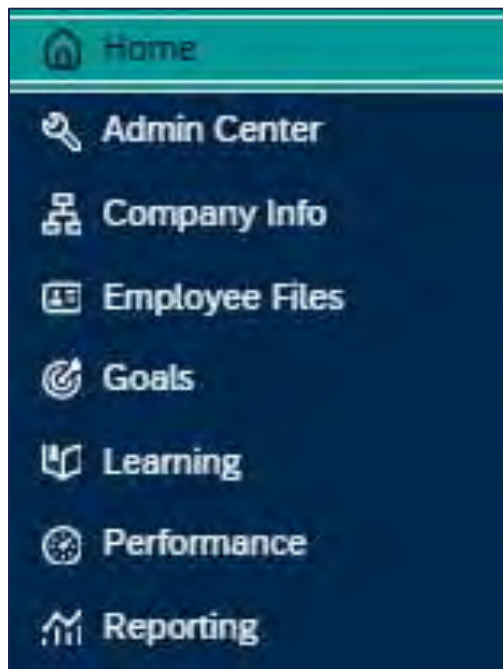


---

## NAVIGATION BASICS

SuccessFactors has multiple navigation options for many actions. For most actions, you can use the **Home drop-down menu** at the top of the screen. As you work in the system, you will find the navigation sequence that works best for you.

Your **Home** menu may not have all of the options listed here. Your menu and access rights are based on your roles and responsibilities within your agency.



This is the Home menu and the actions associated with it.

**Admin Center** = For Agency Administrators only

**Company Info** = Open the Organizational Chart

**Employee Files** = Open your Profile

**Goals** = View the Goal Plans for you and your employees

**Learning** = Navigate to the Learning Management System for training

**Performance** = Navigate to Inbox and CPM Forms

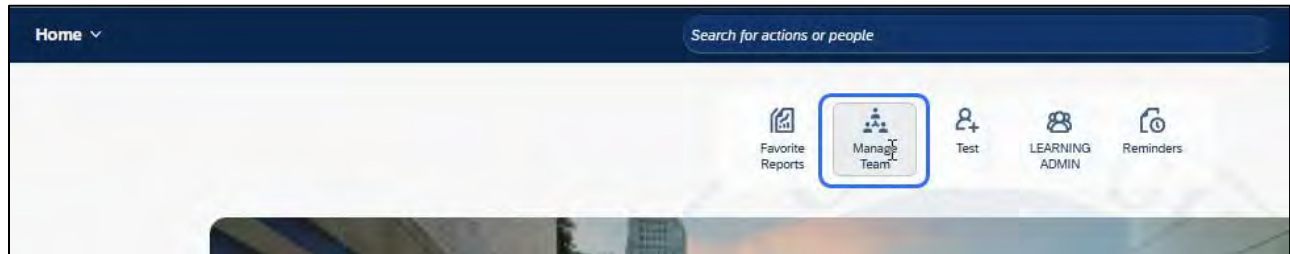
**Reporting** = Allows you to run the reports available to you

Many actions can be opened from your dashboard as well as through the Home menu. The **Manage My Team** card offers you a shortcut to navigate to actions associated with any of your direct reports. You can quickly access **My Learning**, **View Report Center**, and other actions suited to your role and responsibilities.

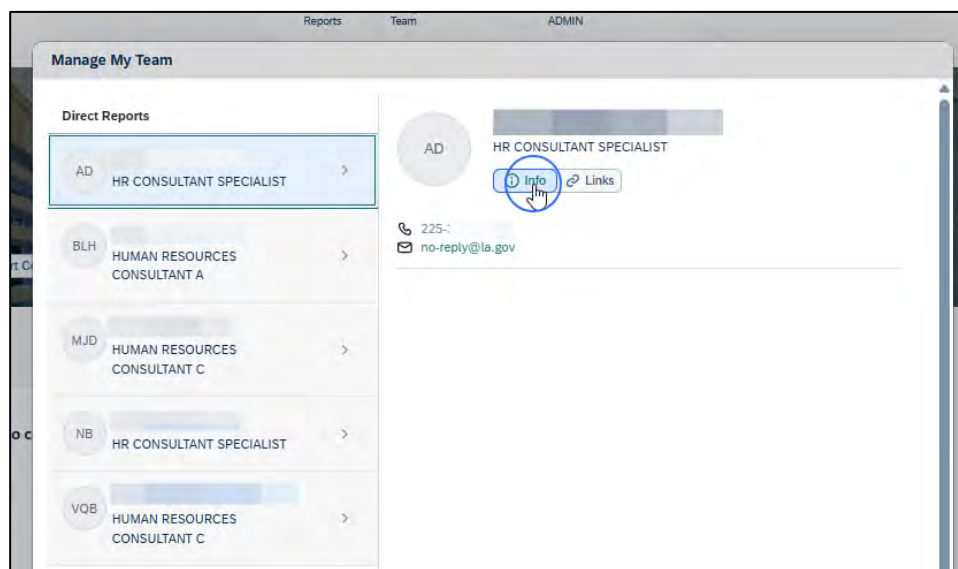
---

## USING MANAGE MY TEAM

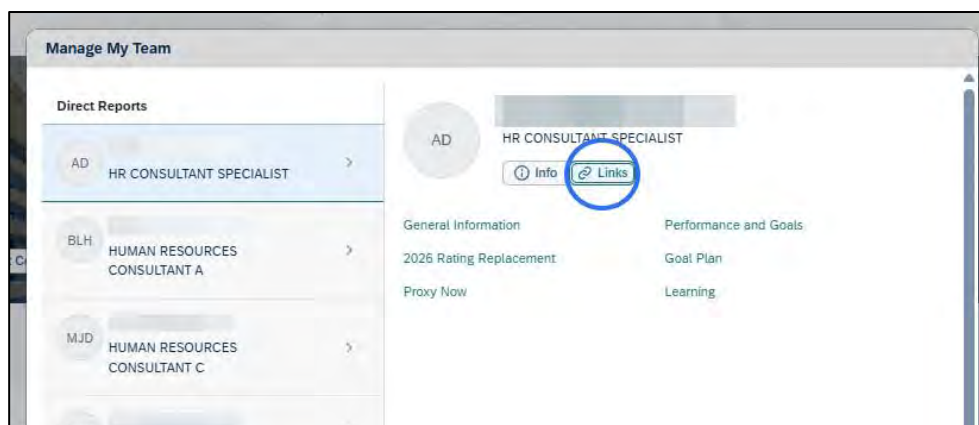
1. Select the **Manage My Team** tile at the top of the screen.



2. A window with a **list of your Direct Reports** opens. For each employee, you can see contact information.

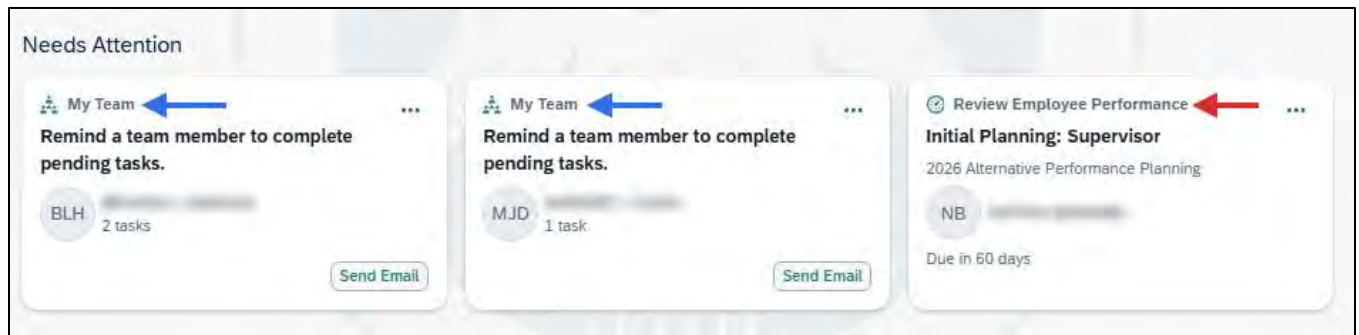


3. From **Links**, you can navigate to the employee's **General Information**, **Goal Plan**, and **Learning**. Some performance management forms may be available from this menu as well.

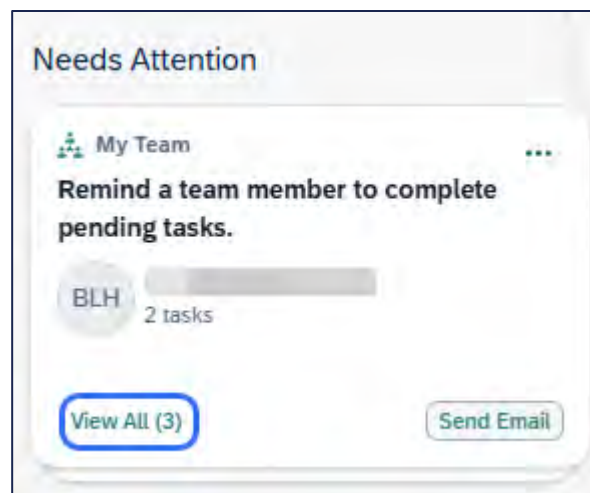


## VIEWING AND CREATING REMINDERS

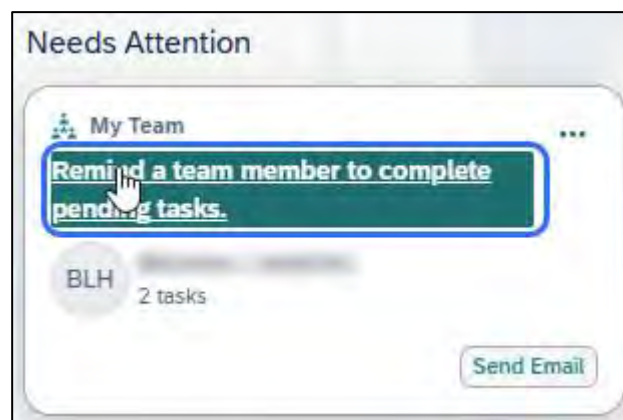
1. In the **Needs Attention** section, you will see two different types of action cards to be completed. First, you will see **My Team** action cards that show all of the **Pending Tasks** your direct reports must complete. Second, you will see **Performance Management** tasks regarding CPM forms.



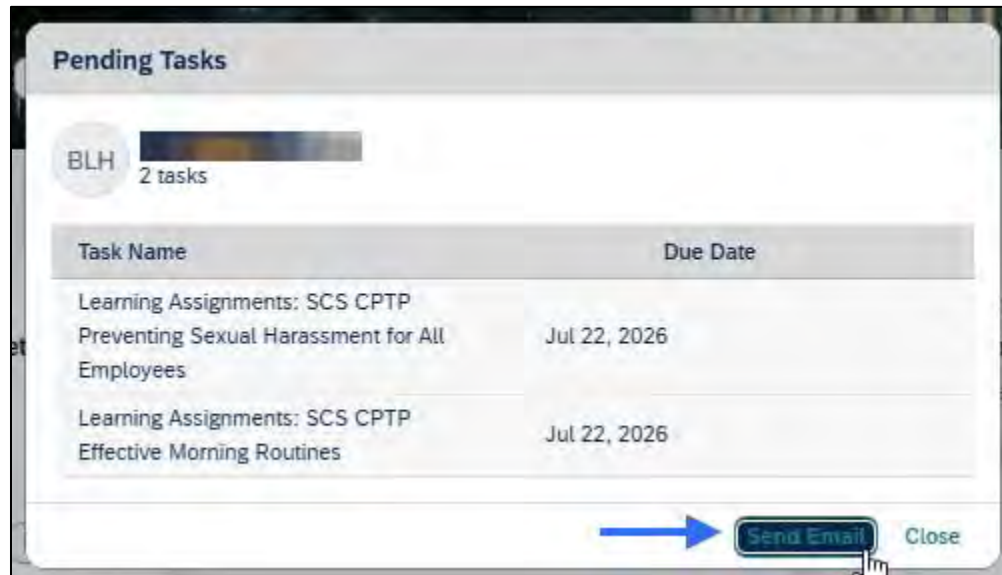
2. Similar actions will stack on top of each other. Select **View All** to see the actions in that stack.



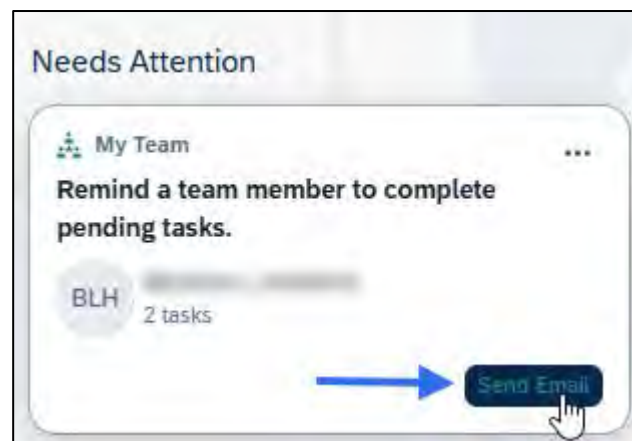
3. For **My Team** actions, you have multiple options. You can select the link to open the detailed view.



4. This view lists all of the **Pending Tasks** and **Due Dates** for each task. From the detailed view, you can send a **Reminder Email** or close the window.



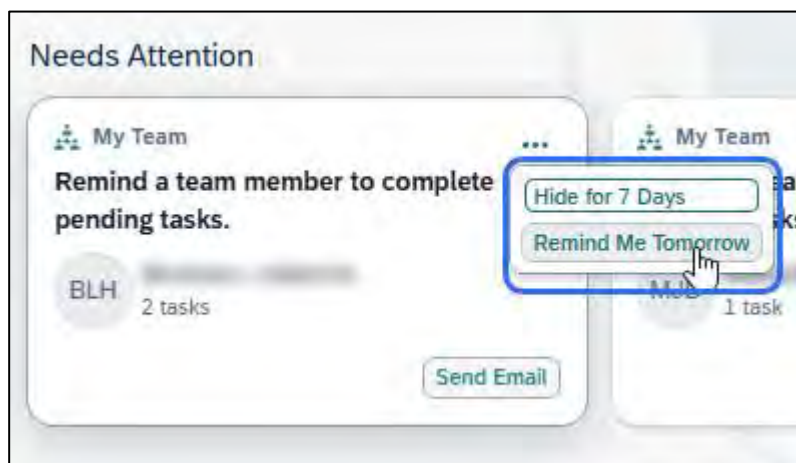
5. From the **My Team** action card, you can also select **Send Email** to send a notification to your employee.



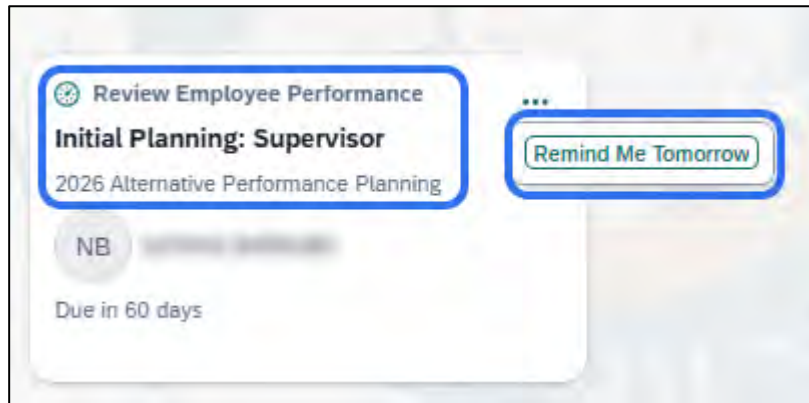
6. You can also edit the email. Select in the **Subject** field to customize the subject. Select anywhere in the **Message** window to edit the body of the email. Select **Copy Me**, if you want a copy to be sent to you as well. When you are finished editing, select **Send** and your employee will be notified.

7. If you don't want to send an email, select the box with the 3 dots to see your other options. You can either **Hide for 7 Days** or you can select **Remind Me Tomorrow**.

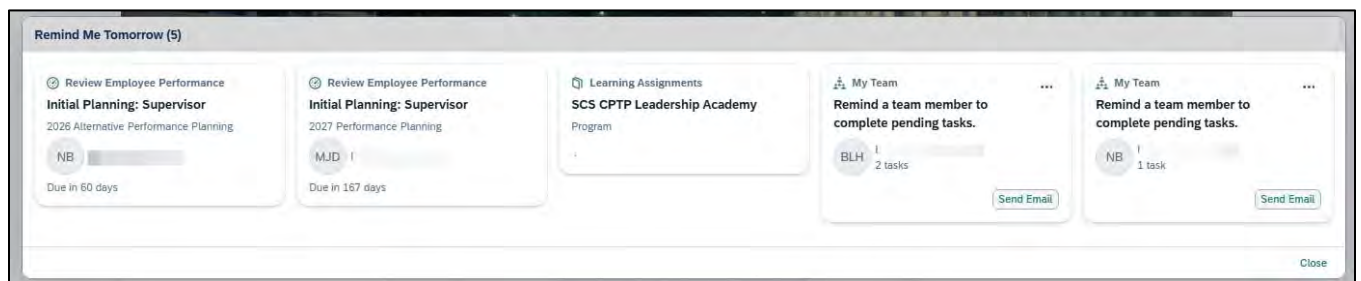
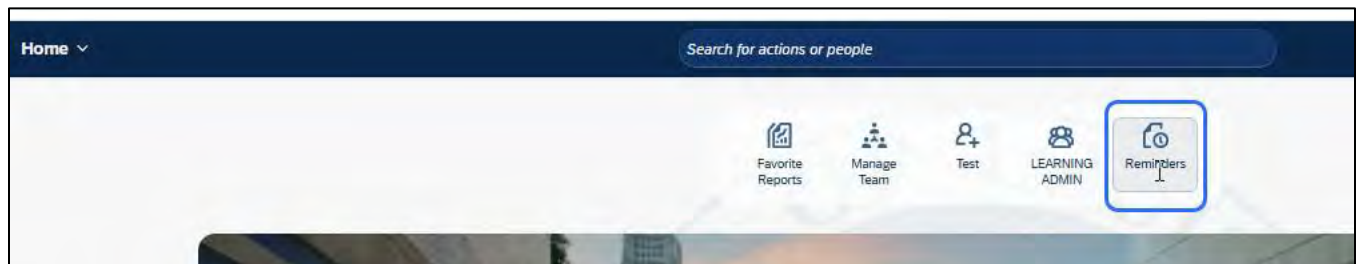
NOTE: This is the only way to create reminders in the system.



8. For **Performance Management** tasks, you only have 1 option when you select the three dots: **Remind Me Tomorrow**. To go to the form, select any of the lines on the card.

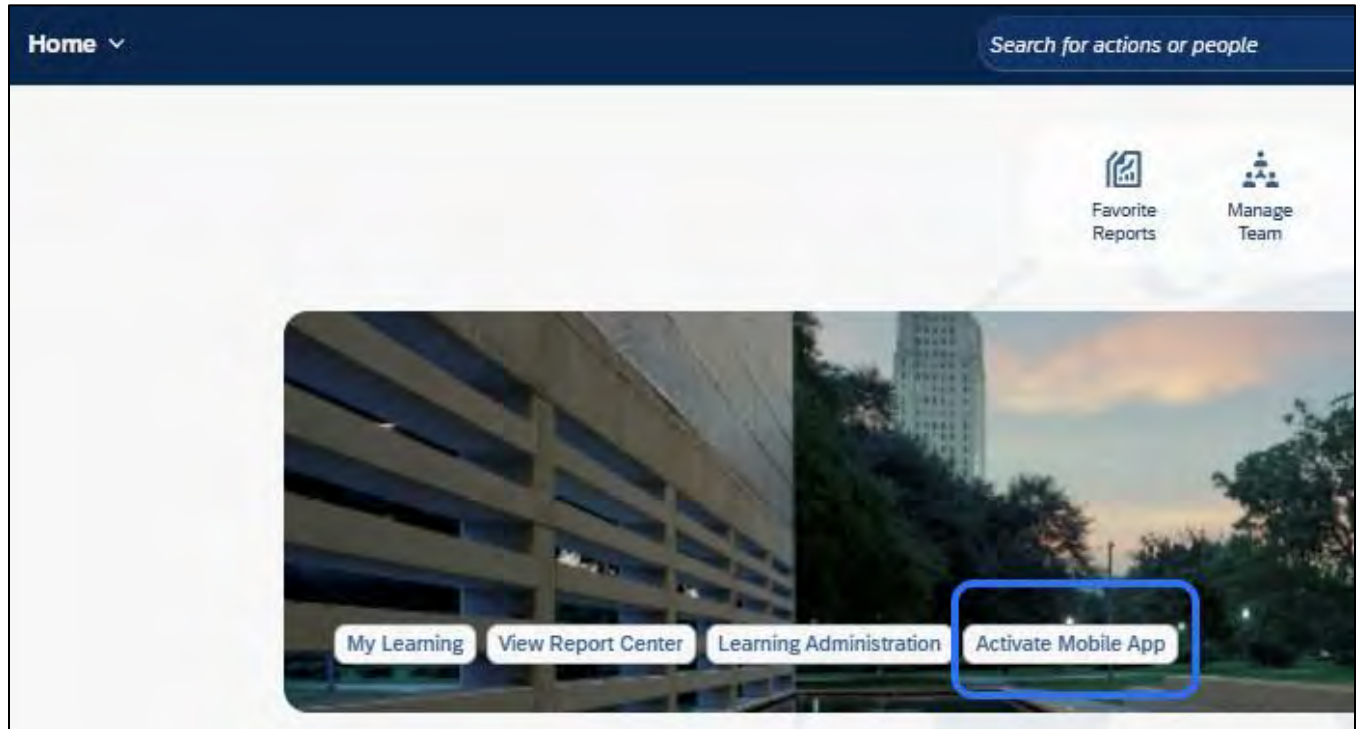


9. Select **Reminders** to view the reminders you create. A pop-up opens that shows all Reminders that you have created.

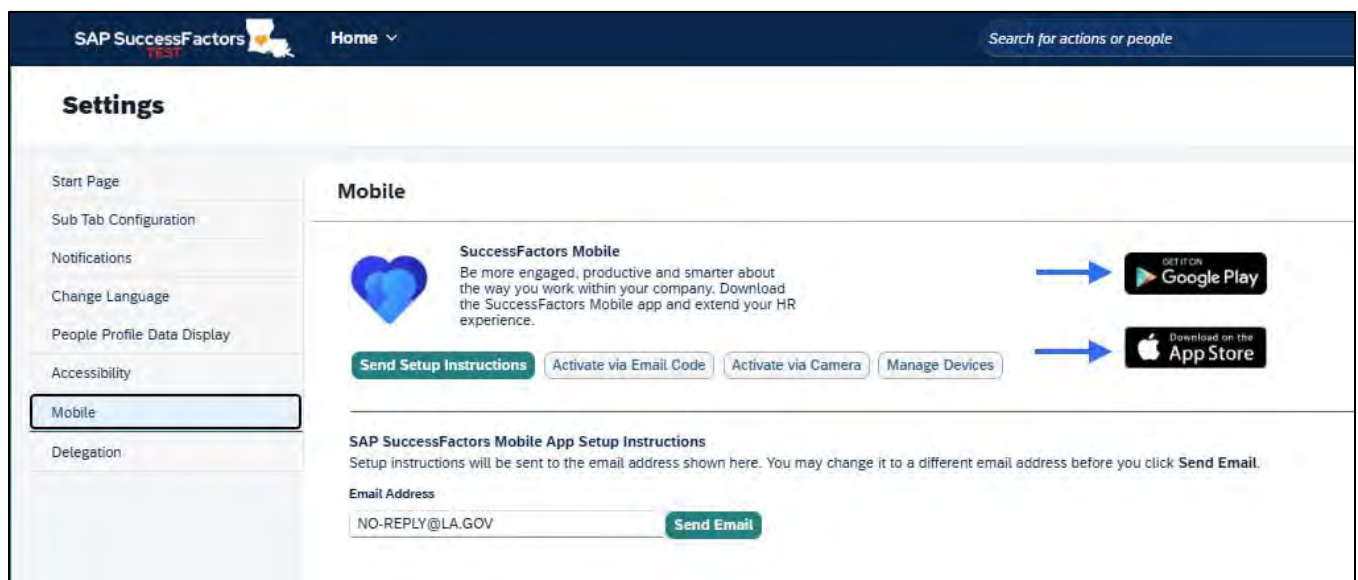


## MOBILE ACTIVATION

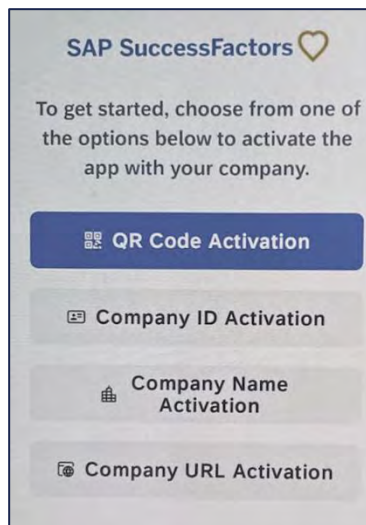
### 1. Select **Activate Mobile App**.



### 2. Download the SuccessFactors app on the appropriate app store for your device.

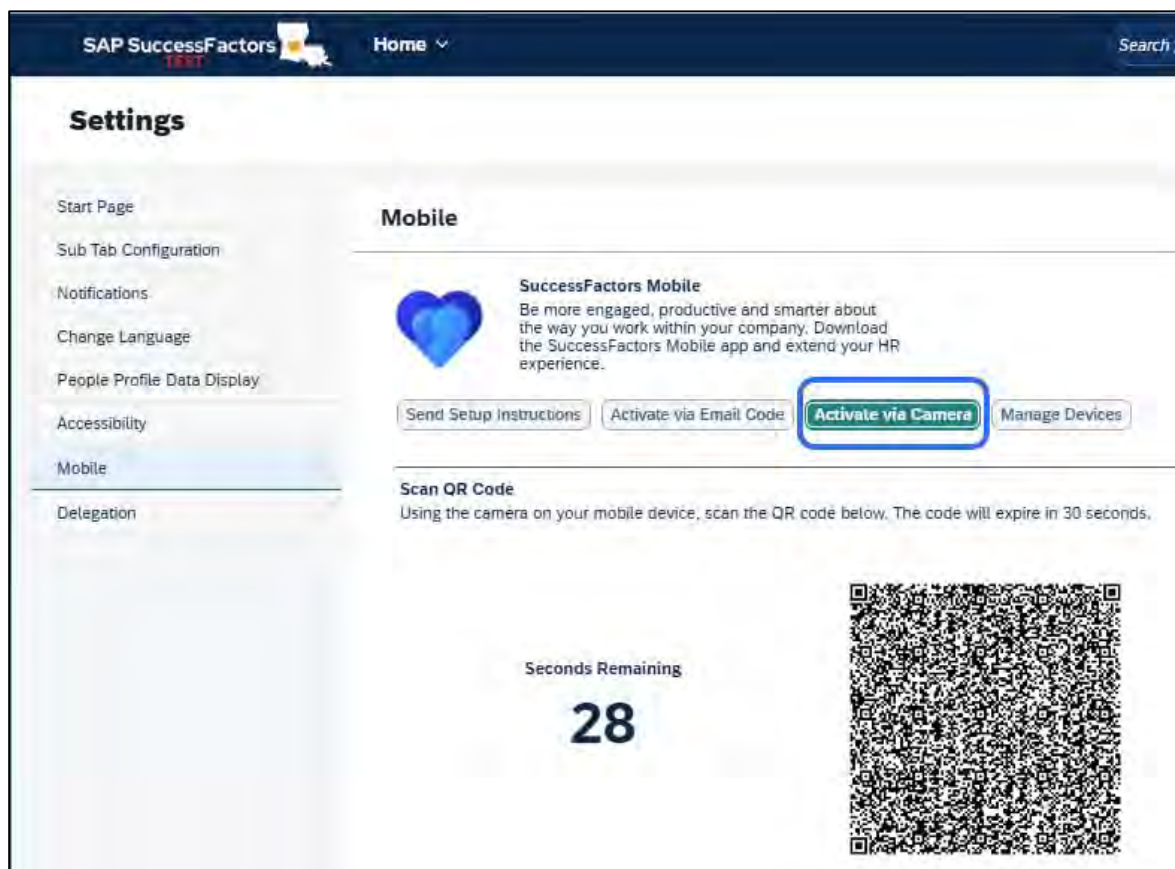


- Follow the on-screen instructions on your device. Open the app. Select **SCAN QR CODE**.



- In SuccessFactors, select **Activate via Camera** and use your phone's camera to scan a QR Code.

NOTE: You only have 30 seconds to scan the QR code before it expires. If it expires, select **Get New Code** and a new QR code will appear.



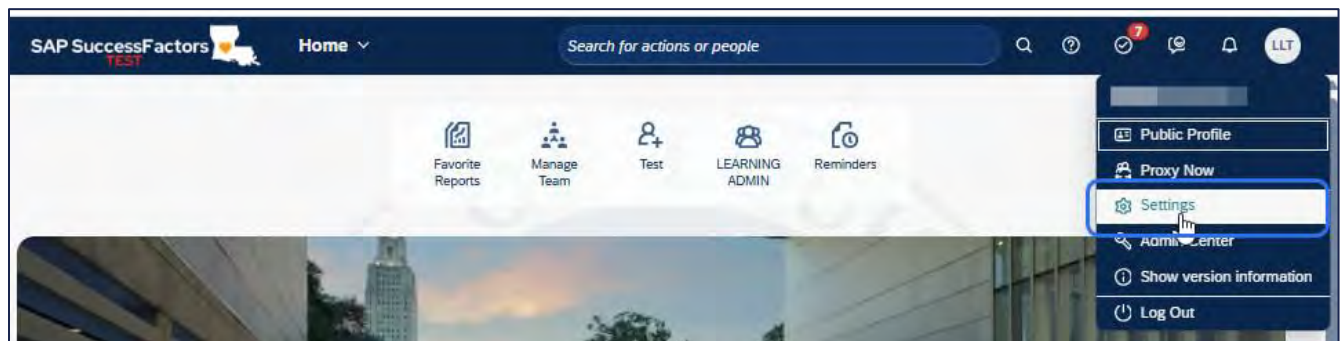
## HOW TO CHANGE YOUR ACCESSIBILITY SETTINGS

Accessibility refers to the ability of all users to access and interact with the application, including those who use assistive technologies. You can use these settings to optimize the application to suit your needs and preferences.

1. In the top right corner of the screen, select your **User Icon**.

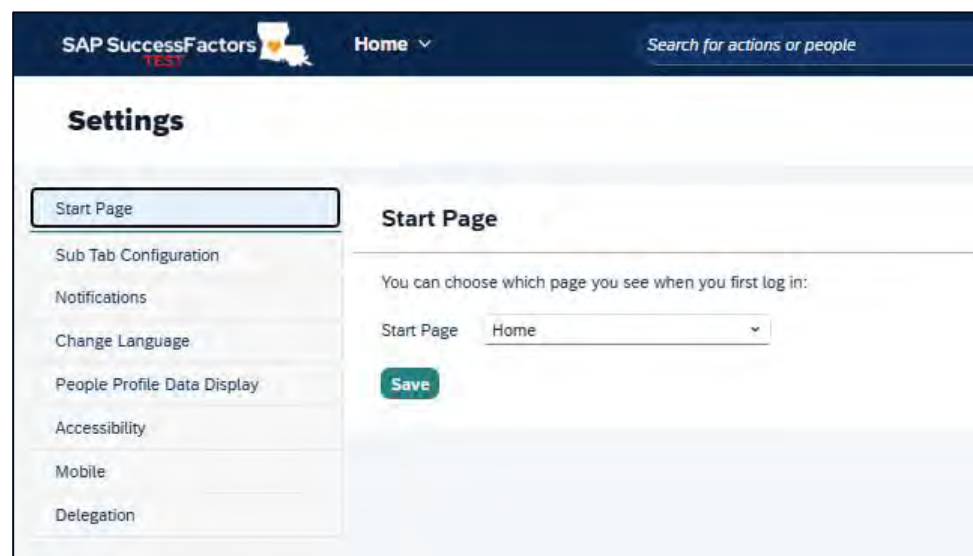


2. Select **Settings** in the menu.



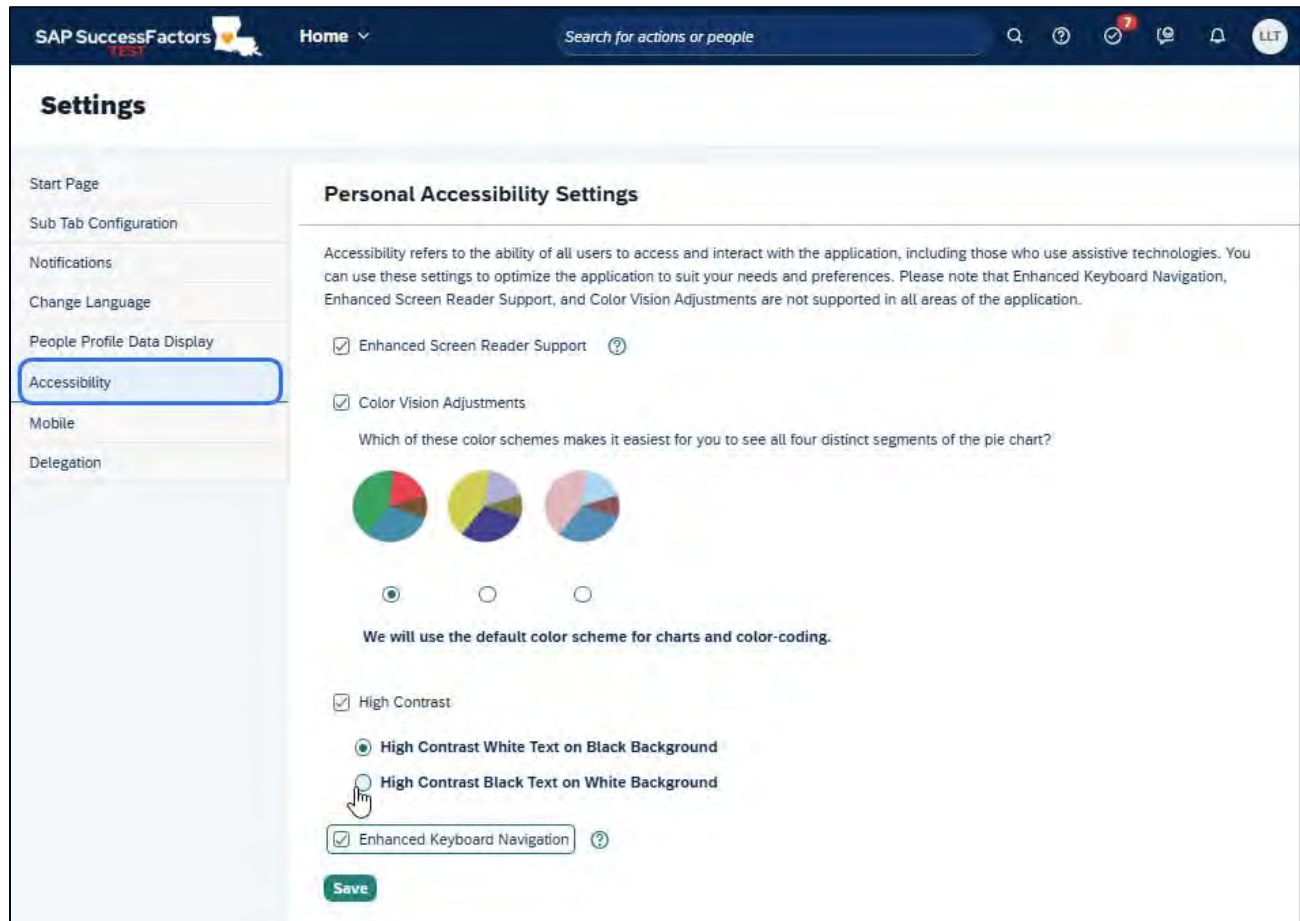
3. This is your **Settings** page. From here, you can change your **Start Page**, **Sub Tab Configuration**, and **Accessibility Settings**.

NOTE: You cannot change **Notifications** or **Language** settings. **Delegation** is not used within our system.



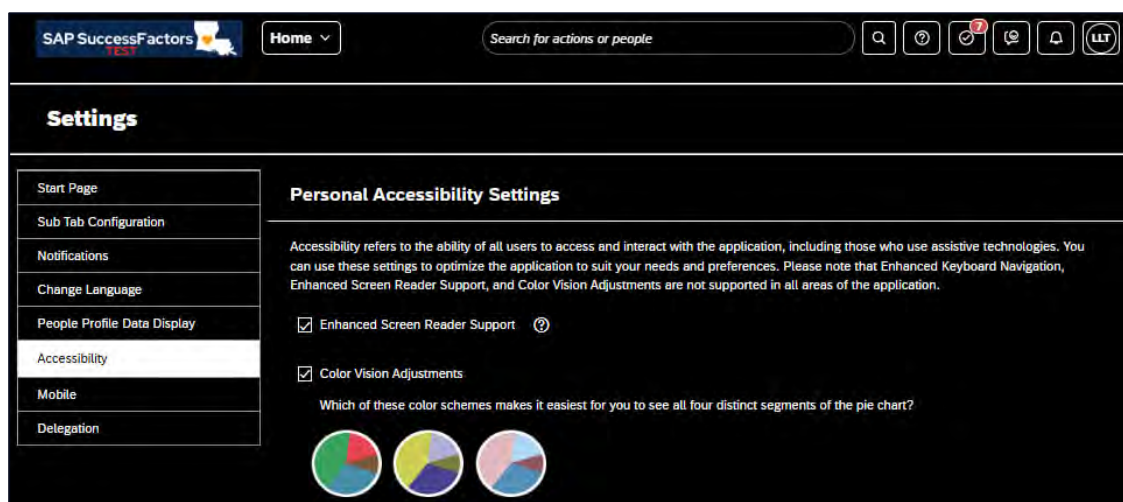
4. Select **Accessibility Settings** to select support features, if necessary. Select **Save** after you have made your selections.

**NOTE: Enhanced Keyboard Navigation, Enhanced Screen Reader Support, and Color Vision Adjustments** are not supported in all areas of the application.



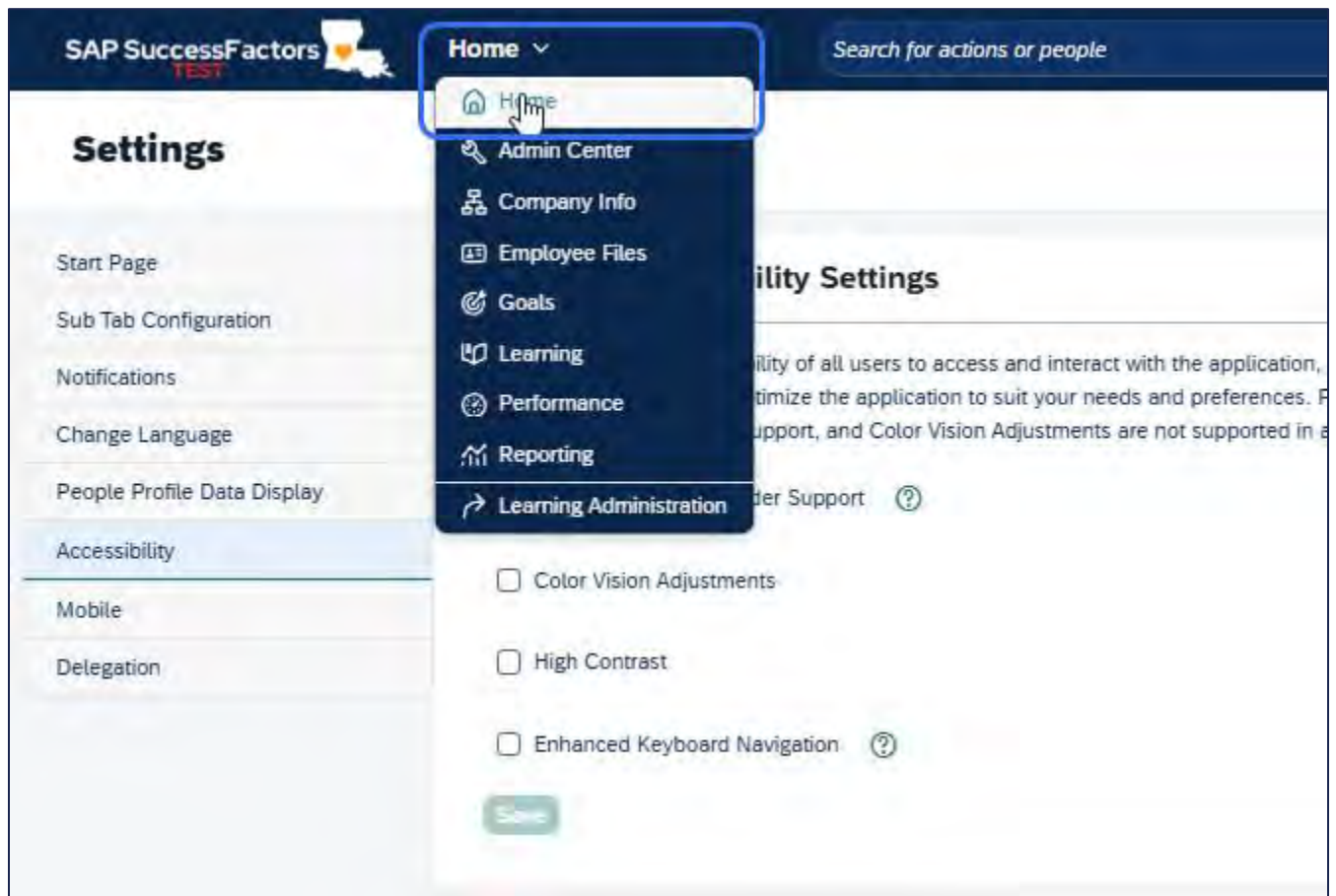
The screenshot shows the SAP SuccessFactors user interface. At the top, there's a header with the SAP SuccessFactors logo, a 'Home' dropdown, a search bar, and several icons. Below the header is a 'Settings' section. On the left, a sidebar lists various settings: Start Page, Sub Tab Configuration, Notifications, Change Language, People Profile Data Display, Accessibility (highlighted with a blue box), Mobile, and Delegation. The main content area is titled 'Personal Accessibility Settings'. It contains a paragraph explaining accessibility and a list of settings: 'Enhanced Screen Reader Support' (checked), 'Color Vision Adjustments' (checked), and 'Enhanced Keyboard Navigation' (checked). Under 'Color Vision Adjustments', there are three pie charts and a question: 'Which of these color schemes makes it easiest for you to see all four distinct segments of the pie chart?'. Below the charts are three radio buttons, with the first one selected. A message states: 'We will use the default color scheme for charts and color-coding.' At the bottom, there is a 'Save' button.

5. **NOTE: This is an example of High Contrast White Text on Black Background.**



This screenshot shows the same SAP SuccessFactors 'Personal Accessibility Settings' page as the previous one, but with a high-contrast theme applied. The background is black, and the text is white. The 'Accessibility' option in the sidebar is still highlighted. The settings listed are the same: 'Enhanced Screen Reader Support' (checked), 'Color Vision Adjustments' (checked), and 'Enhanced Keyboard Navigation' (checked). The pie charts and the question about color schemes are also present. The 'Save' button is at the bottom.

6. Select the **Home** menu to exit settings.



## CONTINUOUS PERFORMANCE MANAGEMENT PLANNING

**WHAT:** CPM Planning establishes the employee's performance expectations for the year through clearly defined goals. During planning, the supervisor identifies what the employee is expected to accomplish, how the employee is expected to perform the work, and how success will be measured.

**WHEN: Performance Planning occurs between January 1<sup>st</sup> and March 1<sup>st</sup> of every year.**  
Employees appointed outside the annual planning period generally must have a Performance Planning session during the first two calendar months following their appointment. Employees appointed on or after October 1 may have planning deferred until the next annual planning period.

**WHY:** The quality of the evaluation depends on the quality of the planning. Clear goals help employees understand what success looks like and give supervisors a meaningful standard for feedback, coaching, and evaluation throughout the year.

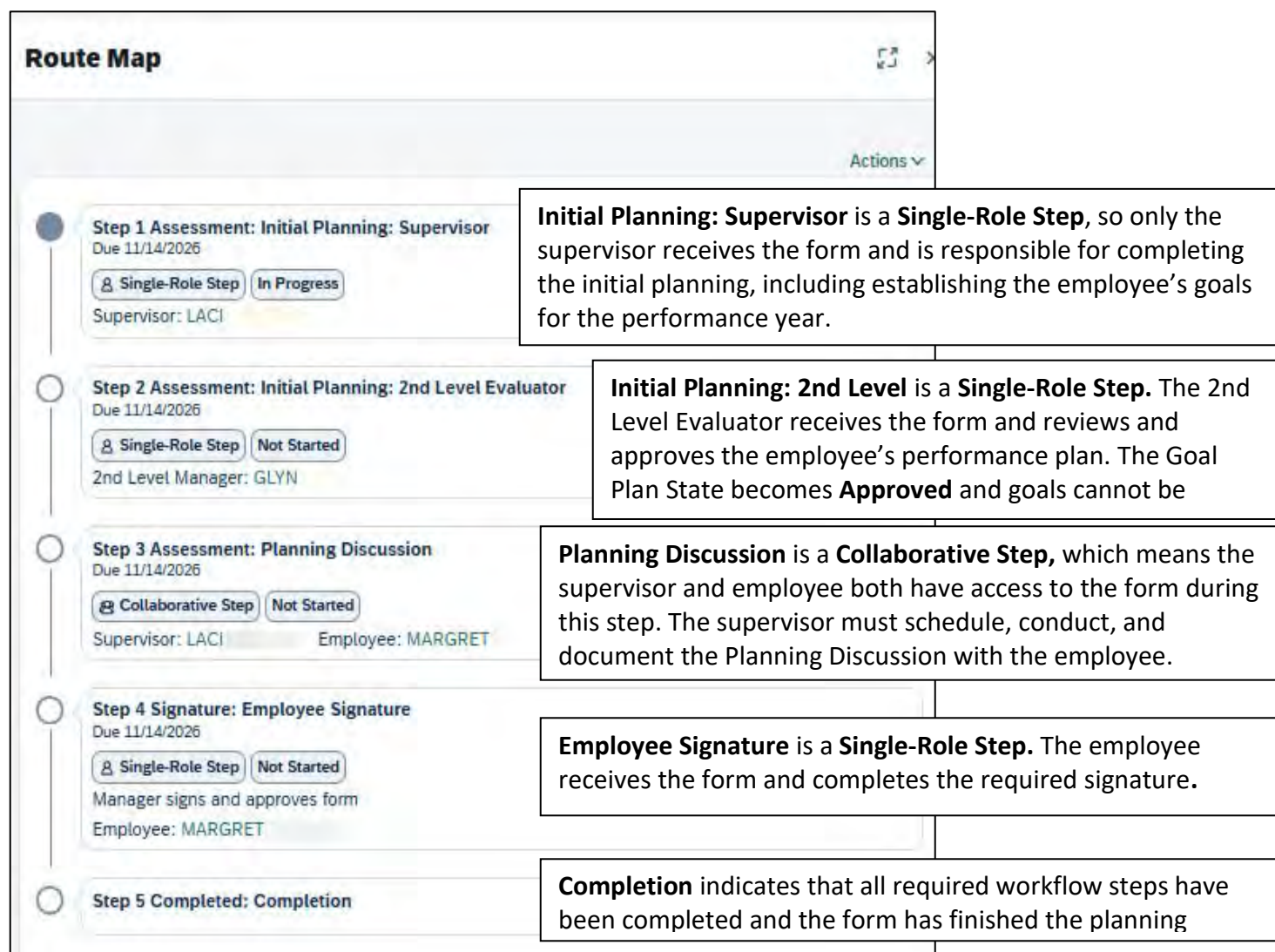
---

## UNDERSTANDING THE CPM PLANNING ROUTE MAP

The **Route Map** shows the steps the performance planning form follows from initial planning through completion. (The image below is an expanded Route Map that is available to view in the employee's form.)

There are two types of workflow steps:

- **Single-Role Step:** Only one person receives the form and is responsible for completing the step.
- **Collaborative Step:** Multiple people receive the form **at the same time** and are responsible for tasks within the step. For example, during the Planning Discussion step, both the supervisor and employee have access to the form simultaneously.



## UNDERSTANDING GOALS

**Goals are the foundation of Performance Planning** because they establish the employee's performance expectations for the year. Well-written goals clarify what the employee is expected to accomplish, how success will be measured, and what standards will be used to evaluate performance.

This section explains how to write effective goals, complete the required goal fields, and select the appropriate goal category. It also explains how goals are created and managed in SuccessFactors through both the employee's Goal Plan and Performance Planning Form.

---

## WRITING GOALS

**WHAT:** Well-written goals establish clear performance expectations and provide the foundation for monitoring, feedback, and evaluation throughout the performance year. Because supervisors must evaluate employee performance, goals should clearly define what success looks like and how it will be measured.

**SMART** goals are **Specific, Measurable, Achievable, Relevant, and Time-Bound**. These components help supervisors communicate clear expectations and give employees a better understanding of what successful performance looks like.

**WHEN:** Goals should be established during the Performance Planning period but managed throughout the performance year. Supervisors should monitor progress, discuss performance, and provide feedback as the employee works toward established goals.

Before entering goals into SuccessFactors, take time to plan them outside the system. Draft each **goal and metric** and decide how the goals will be **weighted** so the **total equals 100%**. Develop your goals outside the system to make it easier to complete the Planning Form.

**WHY:** Goals turn job responsibilities and organizational priorities into clear performance expectations. They give employees a clear picture of what success looks like and provide supervisors with a consistent standard for monitoring performance, providing feedback, and evaluating results.

### SF NOTES:

- You must create a minimum of 3 goals on a Goal Plan.
- The maximum number of goals allowed in SuccessFactors is 10.
- The weight of the goals must be equal to 100%.
- After the performance management form has been approved by the 2<sup>nd</sup> Level Evaluator, the Goal Plan may not be edited without HR unapproving the Goal Plan.

## 5 STEPS FOR WRITING CPM SMART GOALS

The SMART framework identifies the components of an effective goal, but the order of the letters is not necessarily the best way to develop one. The process used in this manual begins with what is **Relevant**, then makes the goal **Specific, Measurable, and Time-Bound**, before checking that the completed goal is **Achievable**.

**1. Start with RELEVANT.** Align with existing tasks and agency goals.

- List tasks that the employee does daily, weekly, monthly, quarterly, and annually.
- Get strategic and add upcoming projects, initiatives, and/or priorities.

**2. Make it SPECIFIC.** Define performance expectations.

- Decide if the employee needs to sustain the current level of performance or improve.
- Add a verb that matches your performance expectations.

**3. Make it MEASURABLE.** Ensure you can track progress and success.

- Add a measurement that defines how much, how often, or to what standard.
- Add something countable – a number, percentage, target - if possible.
- Don't force a number to fit.
- Add a qualifier that sets the standard and explains HOW the work should be done.
- Define the qualifier and link it to supporting documentation.

**4. Make it TIME-BOUND.** Set a clear deadline for achieving the goal.

- Add timeframes like each month, by the deadline, or throughout the year.
- Be specific about what those timeframes mean in practice.
- Clear timing keeps expectations visible and progress steady.

**5. Check to make sure the goal is ACHIEVABLE.** Set realistic goals within your and your employee's time, resources, and abilities.

- Write a clear metric that explains how you will measure the goal.
- Create a 5-point scale to measure success. Use this scale to guide feedback, data collection, and performance conversations.

---

### FOR MORE INSTRUCTION:

For additional guidance on Performance Planning and goal development, complete the web-based training **SCS CPTP CPM Planning in SuccessFactors** and/or attend the instructor-led course **SCS CPTP Performance Planning and Evaluation**.

## WRITING METRICS

A **metric** explains how you will measure progress and determine whether the employee has successfully met the goal. In SuccessFactors, the metric is a required field and is entered separately from the goal. A useful metric should be practical, easy to track, and based on information that is available throughout the performance year.

When writing a metric, answer these four questions:

### **1. Who will collect the data?**

Start with who is closest to the work. The employee may be in the best position to track work they complete regularly, while the supervisor may collect information related to oversight, quality, or accuracy. In some cases, both may share responsibility. Choose the person who has reliable access to the information.

### **2. How will the data be collected?**

Use what already exists whenever possible. Agency systems, reports, spreadsheets, workflow tools, completed forms, emails, client feedback, or other documentation may provide the information you need. The method does not need to be complicated; it needs to provide consistent, dependable information about performance.

### **3. How often will the data be collected?**

Match the frequency to the work. Daily activities might be summarized weekly or monthly, while project-based goals may be tracked at milestones or after major deliverables. Collect information often enough to identify progress and make adjustments during the year—not just at evaluation time.

### **4. How often will you meet to discuss progress?**

Decide when you and the employee will review the information together. These conversations may occur monthly, quarterly, at project milestones, or during regularly scheduled check-ins. Reviewing progress throughout the year gives supervisors an opportunity to provide feedback and gives employees time to make adjustments before the evaluation.

If you cannot identify a reasonable way to collect and review the information needed to measure the goal, reconsider whether the goal is achievable as written.

---

## SAMPLE GOALS AND METRICS

The goal states the performance expectation. The metric explains how the supervisor and employee will track and discuss performance throughout the year. Metrics should support the goal without simply repeating it.

### **Example: Performance Goal**

**Goal:** Process applications accurately and within established timelines throughout the performance year.

**Metric:** The employee will track the number of applications processed each week. The supervisor will review application records for accuracy and timeliness. The supervisor and employee will review the data during monthly check-ins to discuss performance, identify any concerns, and determine whether adjustments are needed.

### **Example: Behavior Goal** (from the [SCS CPM Behavior-Based Goals Toolkit](#))

**Goal:** Demonstrate willingness to accept feedback from supervisor and incorporate it into future tasks to improve performance.

**Metric:** Supervisor will log key examples where feedback has been applied and evaluate how the employee has demonstrated improvement in the quality or execution of tasks after receiving feedback. These examples will be reviewed during quarterly check-ins.

### **Example: Compliance Goal**

**Goal:** Complete all required annual mandatory training by December 1, 20XX.

**Metric:** Required courses include, but are not limited to, Preventing Sexual Harassment, Ethics, and any other assigned mandatory training. Completion will be verified through the employee's Learning History in SuccessFactors. The supervisor and employee will review progress during quarterly check-ins to ensure all required training is completed by the deadline.

### **Example: Additional Assigned Work**

**Goal:** Successfully complete additional assigned tasks with quality and timeliness while maintaining primary job performance standards.

**Metric:** The employee will maintain a log of additional assigned tasks, including the date assigned, deadline, completion date, and relevant quality notes or outcomes. The log will be reviewed with the supervisor during monthly check-ins.

---

## GOAL FIELDS

Regardless of the method you choose to add a goal, the fields for the goal remain the same. This is a sample goal creation box.

The screenshot shows a web form titled "Create Performance Goal". It contains several input fields and dropdown menus. The "Goal Name" field is a large text box with a "500 characters left Legal Scan" indicator. The "How will it be measured?" field is another large text box with a "4000 characters left Legal Scan" indicator. Below these are "Start Date" and "Due Date" fields, both with calendar icons. The "Start Date" is set to "Jun 17, 2024" and the "Due Date" is set to "Dec 31, 2025". There is a "Weight" field with a percentage sign, currently showing "0". Below that is a "Type" dropdown menu with "Department" selected. At the bottom is a "Category" dropdown menu with "Performance" selected.

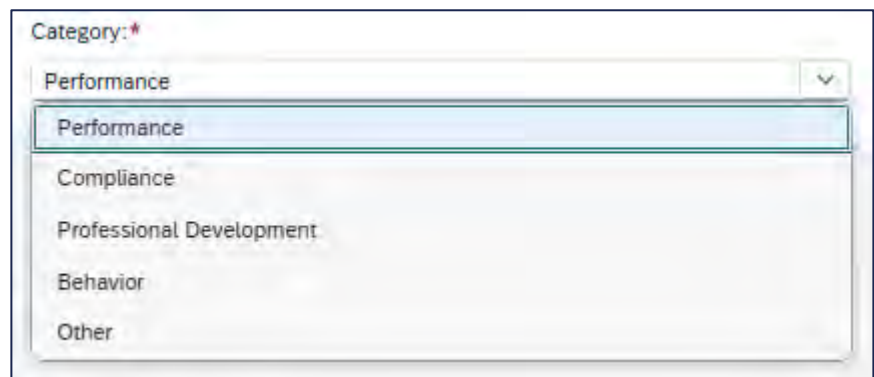
The following fields are **required** for every goal:

- **Goal Name** = This field contains the employee's performance expectation. (The actual goal.) Write the goal as a clear, specific statement that describes what the employee is expected to accomplish or how performance should improve.
- **How will it be measured?** = This field contains the metric for the goal and explains how progress and success will be measured. Use a metric that is clear, practical to track, and consistent when employees share the same goal.
- **Start Date** = This will default to the beginning of the performance evaluation period, as 01/01/20xx. You may change the date, if appropriate.
- **Due Date** = This will default to the end of the performance evaluation period, as 12/31/20xx. You may change the date, if appropriate.
- **Weight** = This is the weight of the individual goal. The total weight of all goals must equal 100%.
  - Weighting goals is a strategic decision. Consider the importance of the goal, the amount of time the employee will spend on it, and how closely it aligns with the employee's responsibilities and organizational priorities.
  - Possible strategies for weighting goals include:
    - Use higher weights for goals that are more important or have greater impact.

- Use weights to reflect the amount of time the employee is expected to spend on the goal.
  - Align goal weights with the weighted duties in the employee's position description.
- You may use one strategy or combine strategies, but apply your weighting strategy consistently across similarly situated employees.
- **Type** = This identifies the level of the organization the goal supports. There are four options: Department, Agency, Section, and Individual.
  - **Department** – Use when the goal supports a department-wide priority or objective.
  - **Agency** – Use when the goal supports a broader agency goal or initiative.
  - **Section** – Use when the goal is specific to the employee's section, unit, or work group.
  - **Individual** – Use when the goal is specific to the employee's own responsibilities, performance, or development.
  - **Department** is the default selection if no type is chosen. Supervisors should select the option that best reflects the level the goal is intended to support.

## CATEGORIES OF GOALS

One of the fields you will complete is **Goal Category**. The category identifies the primary purpose of the goal and helps describe what the goal is intended to address. Available categories include Performance, Behavior, Compliance, Professional Development, and Other.

A screenshot of a web form showing a dropdown menu for 'Category: \*'. The menu is open, displaying a list of options: Performance (highlighted), Compliance, Professional Development, Behavior, and Other. The dropdown is styled with a light blue header and a white body with a thin border.

**Performance-based goals** focus on the tangible outputs and achievements of an employee's work, specifically defining what they need to accomplish. These goals, generally, relate to the duties listed in the employee's position description and should align with organizational goals and objectives.

Examples might include processing assigned requests within established timeframes, completing a project or report by a specified deadline, reducing a backlog of work, implementing a new or revised process, or meeting established productivity or quality standards.

**Behavior-based goals** focus on the employee's actions, behaviors, and approaches to work, emphasizing how they perform their duties. They aim to improve specific competencies, skills, or professional conduct. Behavior-based goals can be especially useful when a supervisor wants to

correct a behavior that is affecting performance or develop a behavior that will help an employee grow.

For example, a supervisor might create a behavior-based goal to address an employee who repeatedly resists feedback or to help an employee strengthen leadership skills in preparation for greater responsibility.

The **SCS Behavior-Based Goals Toolkit** provides ready-to-use goals, metrics, five-point evaluation scales, and check-in suggestions based on competencies in the Louisiana Competency Model. Supervisors can use the goals as written or revise them to fit the employee and situation. The SCS Behavior-Based Goals Toolkit is available on the SCS website in the CPM Training Center or by selecting this link: [SCS Behavior-Based Goals Toolkit](#)

**Compliance goals** identify tasks, behaviors, or requirements that employees must follow to meet established laws, policies, procedures, regulations, or organizational standards. These goals are used when successful performance depends on consistently following a required process or standard.

For example, a compliance goal might require an employee to complete required documentation accurately and on time, follow established safety or security procedures, or complete mandatory training.

**Professional development goals** focus on expanding an employee's knowledge, skills, behaviors, or competencies related to their current job, job field, or future career goals.

These goals are used when an employee needs to build new capabilities, strengthen existing skills, or prepare for additional responsibilities or future opportunities.

For example, a professional development goal might involve completing specialized training and applying the new skills on the job, earning a job-related certification, developing proficiency with a new system or technology, strengthening presentation or facilitation skills, or gaining experience in an area that supports future career growth.

**Other goals** are goals that do not align with the categories listed above.

---

## WORKING IN THE GOAL PLAN

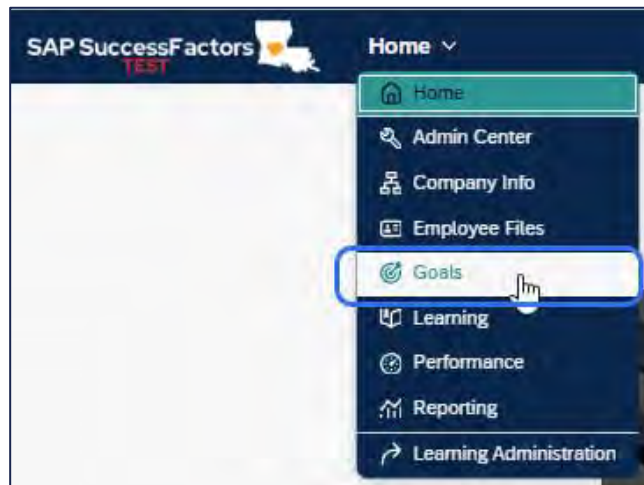
Although goals can be added directly to the Performance Planning Form, supervisors are encouraged to create and manage goals through the employee's Goal Plan whenever possible. The Goal Plan provides additional options for working with goals, including the ability to copy goals from a previous Goal Plan, which is not available when adding goals directly to the form.

The Goal Plan also displays the **Goal State**, which determines what actions are available to supervisors. While the Goal Plan is **Unapproved**, supervisors can add, edit, copy, or delete goals.

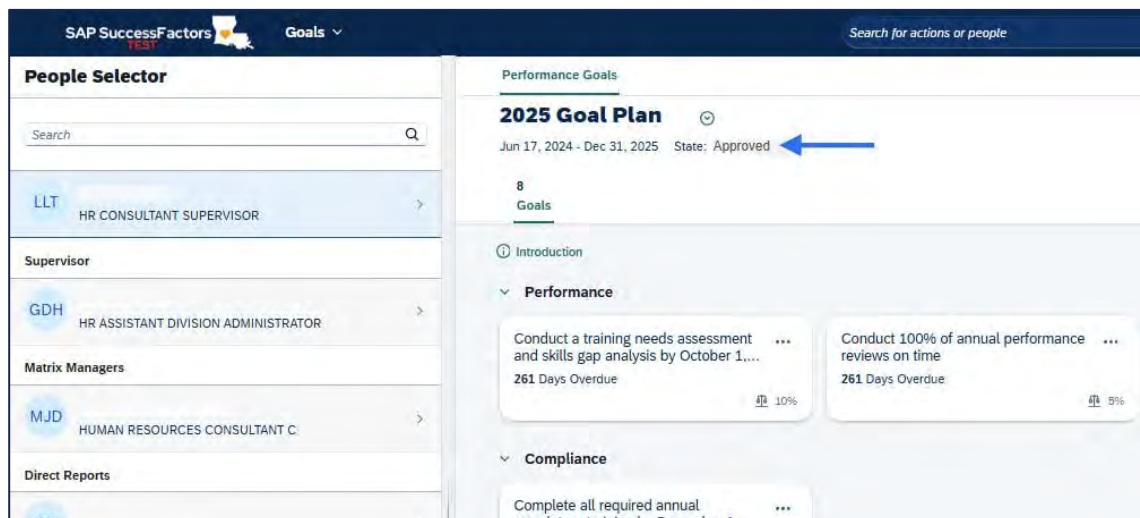
Any changes made in the Goal Plan are automatically reflected on the Performance Planning Form.

### HOW TO ACCESS A GOAL PLAN

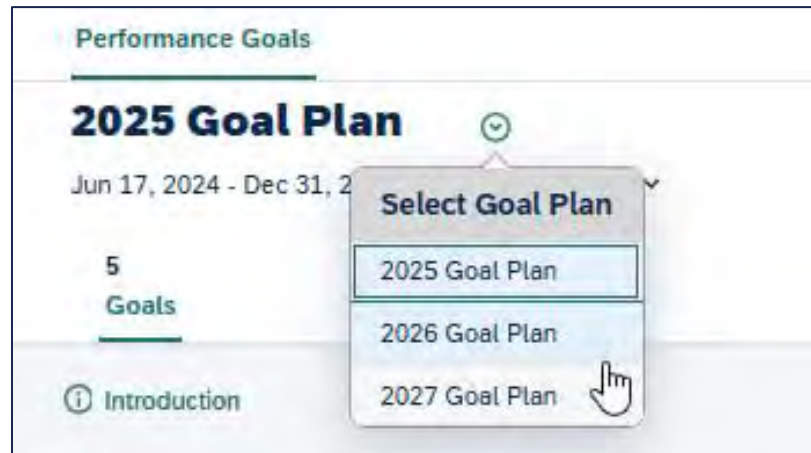
1. Select **Goals** from the **Home** menu.



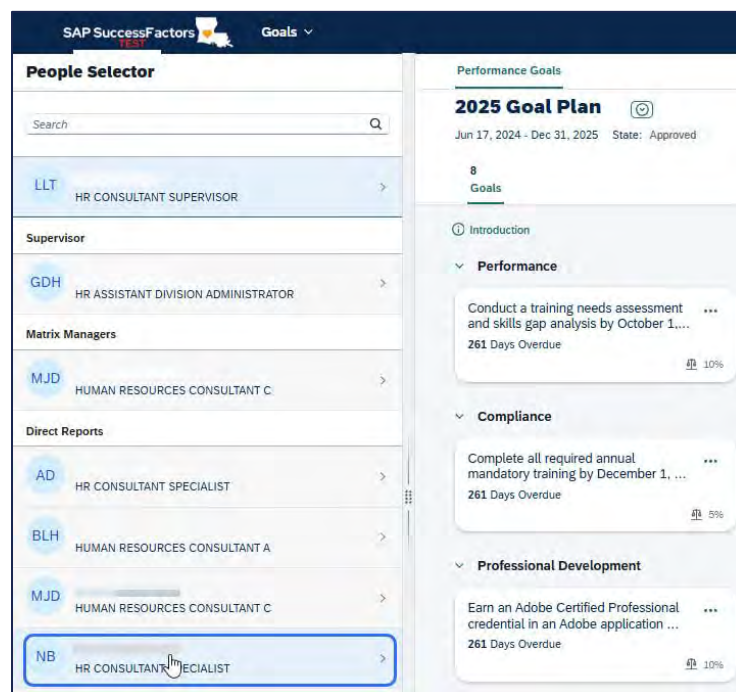
2. **Your Goal Plan** appears as the default page view. The **Goal State** appears at the top of the Goal Plan.



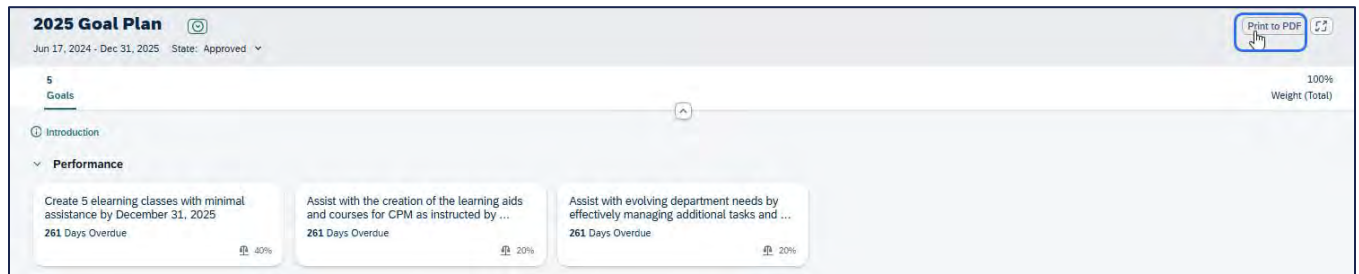
- To view previous or future Goal Plans, select the **green drop-down arrow**. This works for your Goal Plan or your employee's Goal Plan.



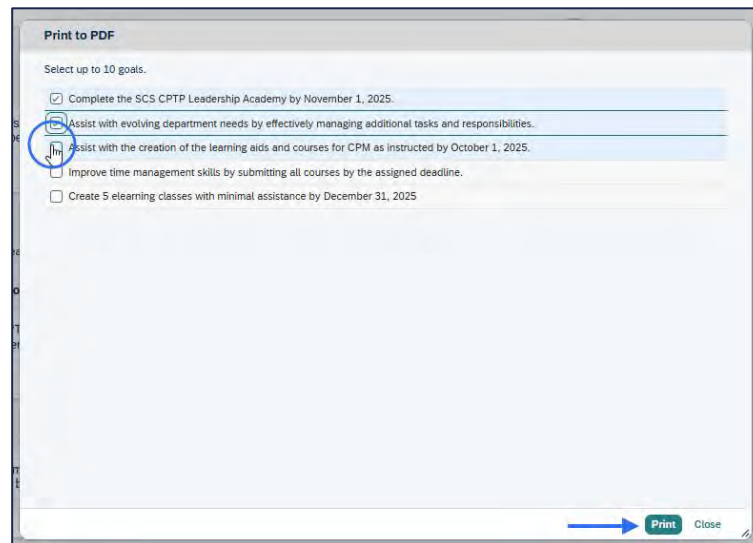
- To open an employee's Goal Plan, **select the name of the employee** or select the > next to the name.



5. Select **Print** to print to HTML or PDF.



6. **Select the Goals** you want to print. Then, select the **Print** button. Follow the onscreen directions to print or save to PDF.



---

## GOAL STATE: UNAPPROVED VS APPROVED

The **Goal State** indicates whether supervisors can make changes to an employee's goals. The state changes as the Performance Planning Form moves through the approval process.

When the 2<sup>nd</sup> Level Evaluator approves the form, the Goal Plan State changes to **APPROVED**, which limits the fields available for editing and prohibits any new goals from being added.

If the 2<sup>nd</sup> Level Evaluator returns the form to the supervisor for revision, the Goal Plan State returns to **UNAPPROVED**; the Goal Plan and form are unlocked and may be edited.

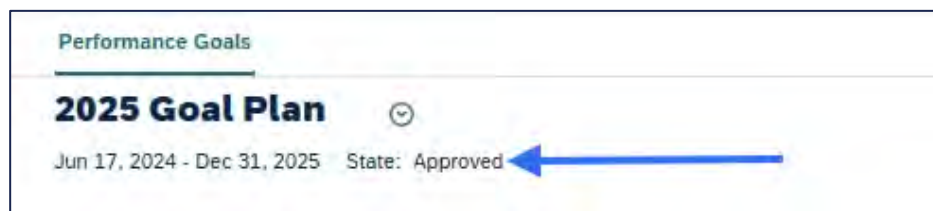
If the goal plan is **UNAPPROVED**, the supervisor can:

- Add goals
- Edit goals
- Delete goals



If the goal plan is **APPROVED**,

- Goals cannot be added
- Goals cannot be edited
- Goals cannot be deleted



NOTE: Only the HR Representative can use the **UNAPPROVE** feature to unlock a Goal Plan.

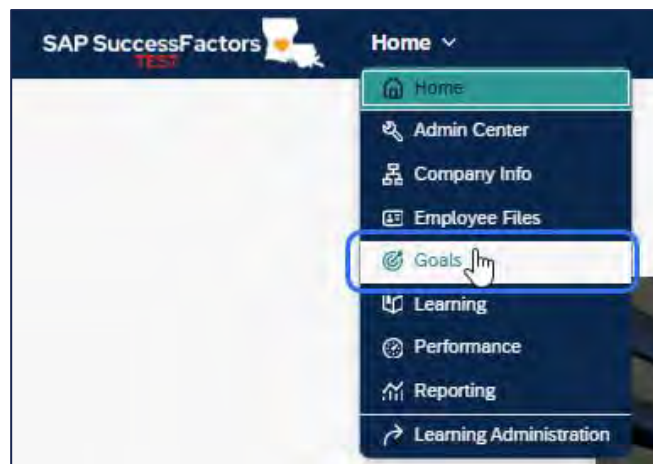
---

## ADDING GOALS THROUGH THE GOAL PLAN

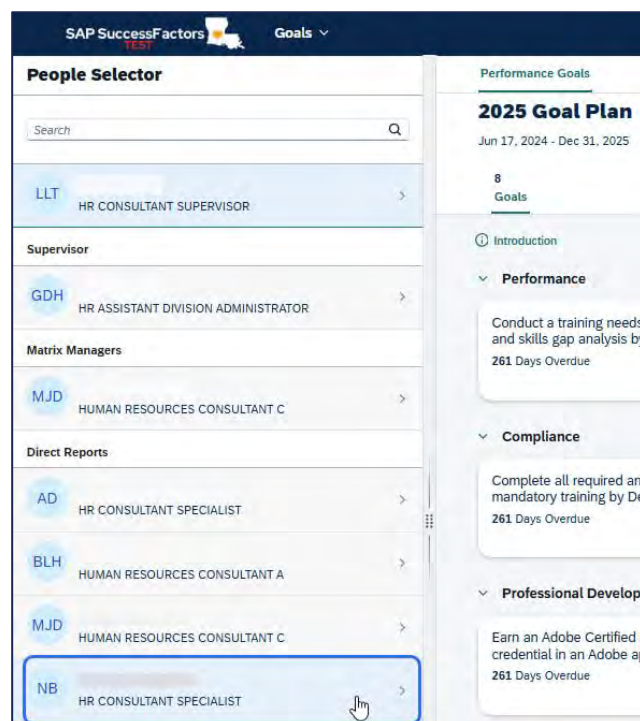
Goals may be added through either the **Goal Plan** or the **Performance Planning Form**. However, supervisors are encouraged to use the Goal Plan because it provides additional options for creating and managing goals, including the ability to copy goals from a previous Goal Plan.

Regardless of where a goal is added, it will appear in both the Goal Plan and the Performance Planning Form.

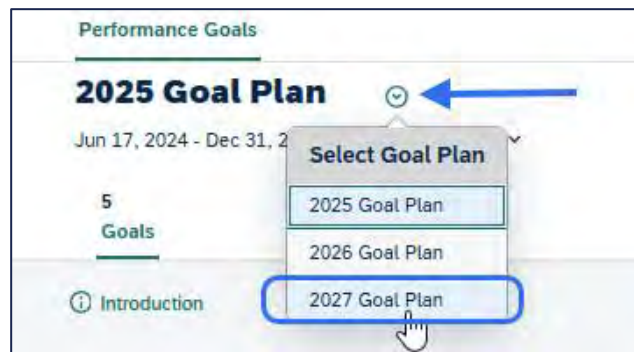
1. From the **Home** menu, select **Goals**.



2. The page opens on **your current Goal Plan**. Select the name of the employee for whom you want to copy a goal from a previous year.



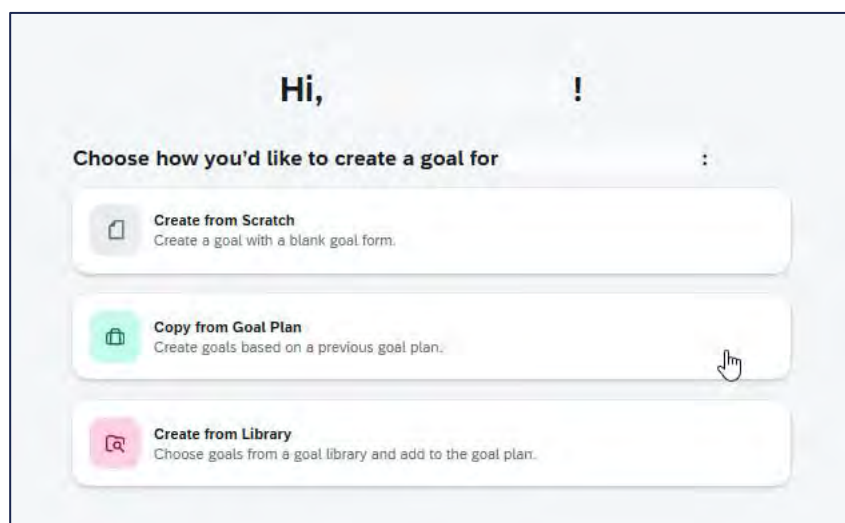
- Use the **drop-down menu** to select the year for which you are planning.



- On your employee's **Goal Plan**, select **Create Goal** at the top right of the screen. This will add the goal to both the **Goal Plan** and the **CPM Planning Form**.



- You have **3 options to create a goal** for your employee in the Goal Plan:
  - Create from Scratch:** This option allows you to make up your own goal and assign any metrics you want. (This is available in both the Goal Plan and the CPM Planning Form.)
  - Create from Library:** This option allows you to select a goal from an organized library with suggested metrics. (This is available in both the Goal Plan and the CPM Planning Form.)
  - Copy from Goal Plan – This option is only available in the Goal Plan.** This allows you to copy a goal from any of the previous Goal Plans for that employee. NOTE: You cannot copy a goal from a different employee.



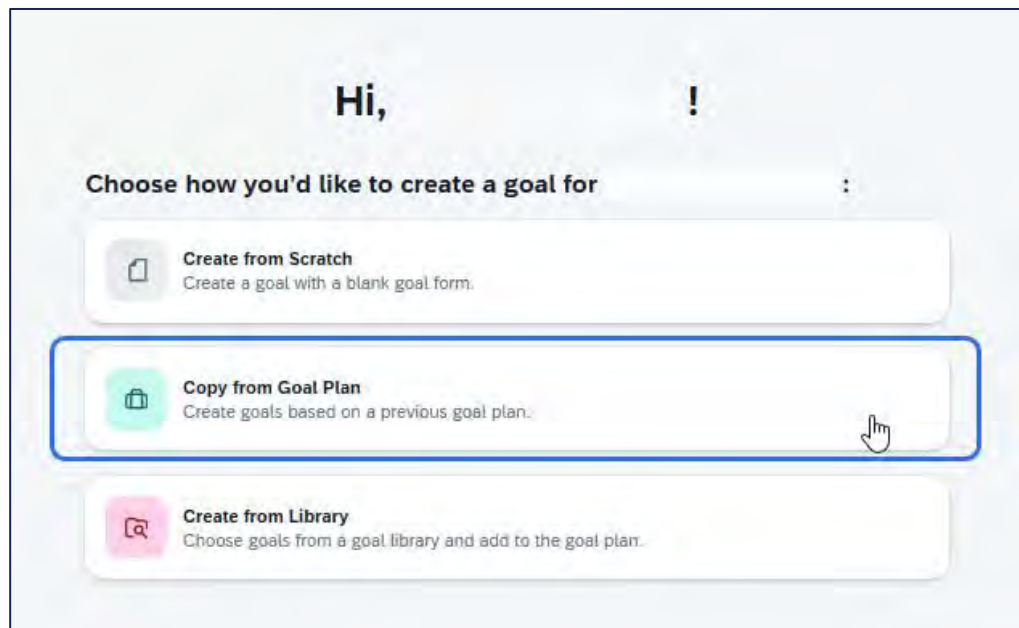
## HOW TO COPY GOALS FROM PREVIOUS GOAL PLAN

SuccessFactors allows you to copy goals created in a previous year for an employee.

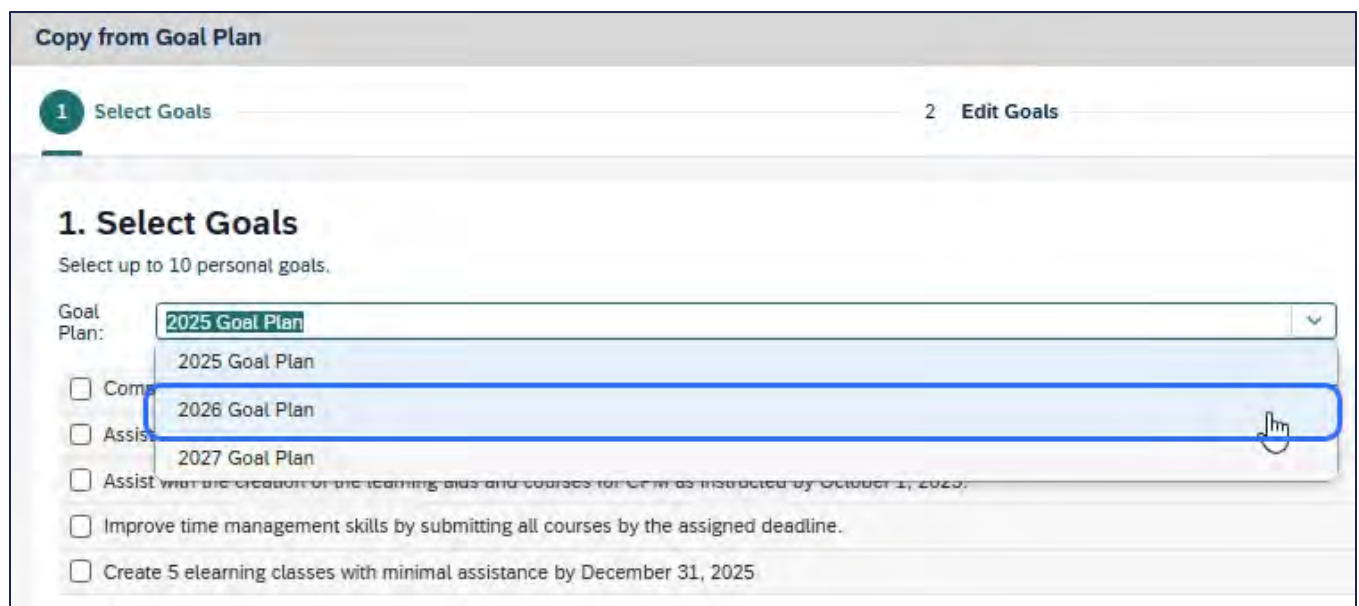
### SF NOTES:

- This feature is only available through the Goal Plan.
- You cannot copy from one employee to another.

1. Select **Create Goal** to open goal creation options. Select Copy from **Goal Plan**.



2. Select the year from which you want to copy. Then, select **Next**.



### 3. Select the goal(s) you want to copy.

### 4. Then, select **Next** at the bottom right.

### 5. You must **edit each goal individually** to continue in the copying process. If you do not edit the goal, you may receive an error message. Select the pencil icon to edit a goal.

6. Edit any fields as needed. **Be sure to change any dates** in the Goal Name and metric as well as the Start Date and Due Date. Check the Type and Category fields and correct, as necessary. Then, select **Next** to return to the Select Goals step.

Copy from Goal Plan

1 Select Goals 2 Edit Goals 3 Copy

Goal Name\*: \*  
Create 5 elearning classes with minimal assistance by December 31, 2027.  
428 characters left Legal Scan

How will it be measured?: \*  
Number of classes created per development schedule.  
3949 characters left Legal Scan

Start Date: \*  
Jan 1, 2026

Due Date: \*  
Dec 31, 2027

Weight: \*  
40 %

Type: \*  
Department

Category: \*  
Performance

Previous **Next** Cancel

7. Select the **pencil icon** to edit the next goal. After you have edited all of the copied goals, select **Next**.

Copy from Goal Plan

1 Select Goals 2 Edit Goals 3 Copy

2. Edit Goals  
Make changes to the selected goals as needed or instructed.

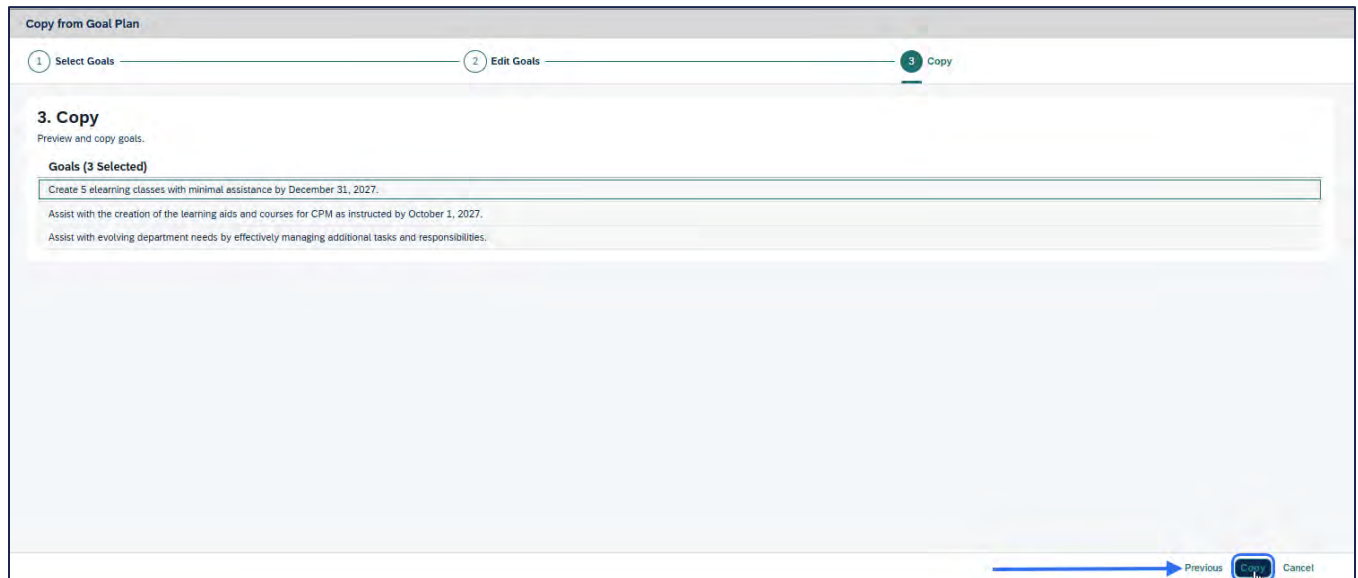
Create 5 elearning classes with minimal assistance by December 31, 2027.

Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.

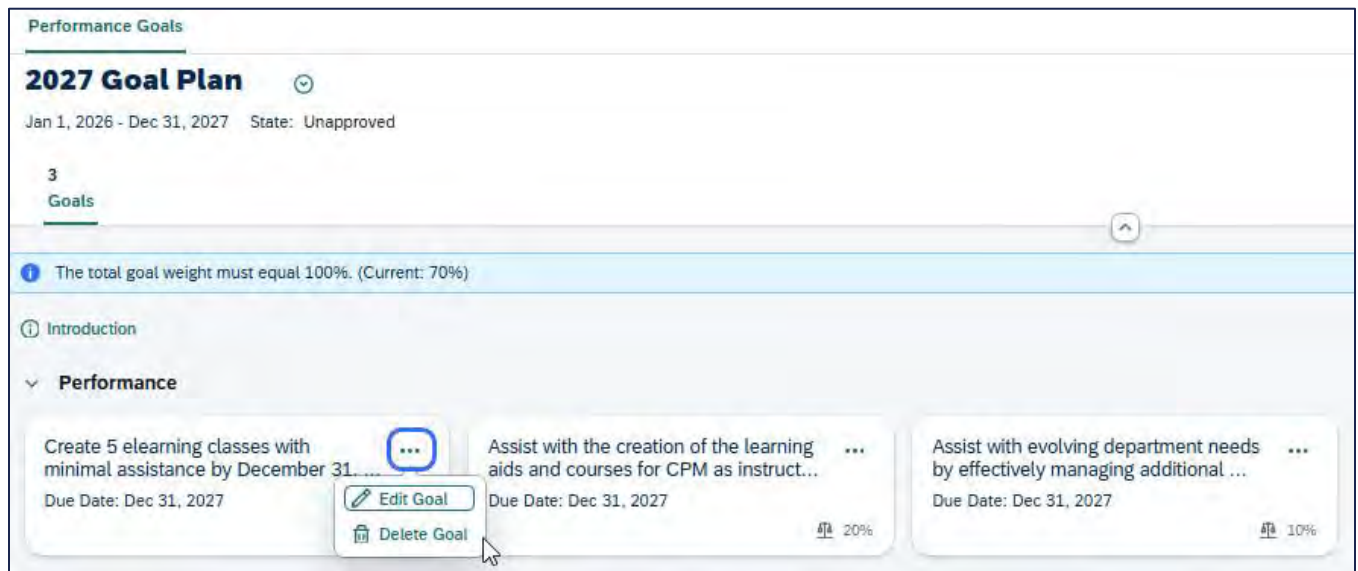
Assist with evolving department needs by effectively managing additional tasks and responsibilities.

Previous **Next** Cancel

8. After you have edited all of the goals, select the **Copy** button.

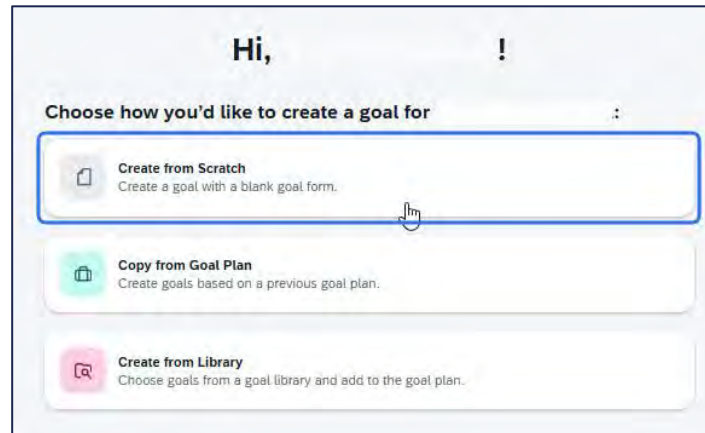


9. The selected goals have now been copied to the new Goal Plan. You may edit or delete goals by **selecting the 3 dots** on a goal card.



## HOW TO CREATE A GOAL FROM SCRATCH

1. Select **Create Goal** to open goal creation options. Select **Create from Scratch**.



2. Type in the **Goal Name**. This is the actual goal, preferably written as a **SMART goal**.

NOTE: You can run a **Legal Scan** of the goal to ensure the language is appropriate.

**Create Performance Goal**

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

3. **Type the metric for “How it will be measured?”** This is the criterion used to determine if the goal has been successfully reached.

NOTE: You can run a **Legal Scan** of the metric to ensure the language is appropriate.

**Create Performance Goal**

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

How will it be measured?: \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left Legal Scan

4. Change the **Start Date** and/or **Due Date**, if necessary.

### Create Performance Goal

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

How will it be measured?: \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left Legal Scan

Start Date: \* Due Date: \*

Jan 1, 2021 Dec 31, 2027

5. Add the **Weight** of the individual goal. **The total weight of all goals must equal 100%.**

### Create Performance Goal

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

How will it be measured?: \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left Legal Scan

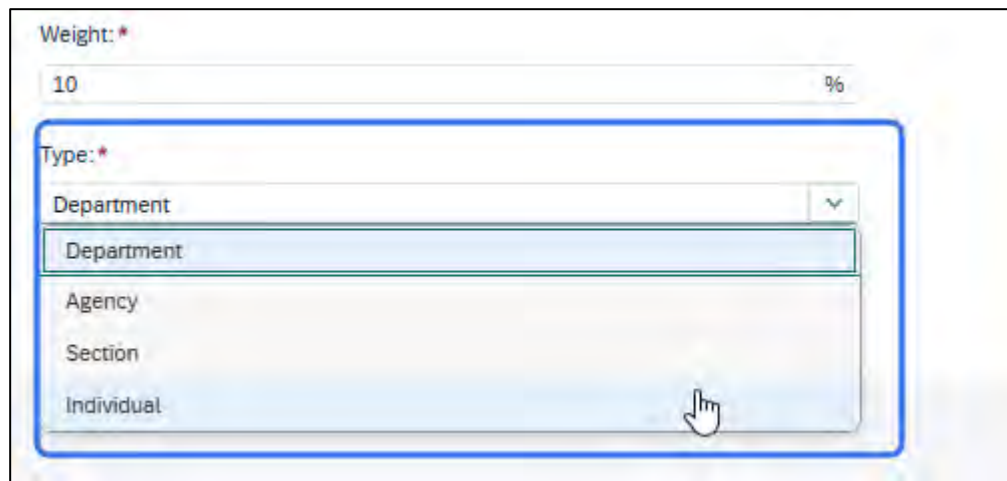
Start Date: \* Due Date: \*

Jan 1, 2027 Dec 31, 2027

Weight: \*

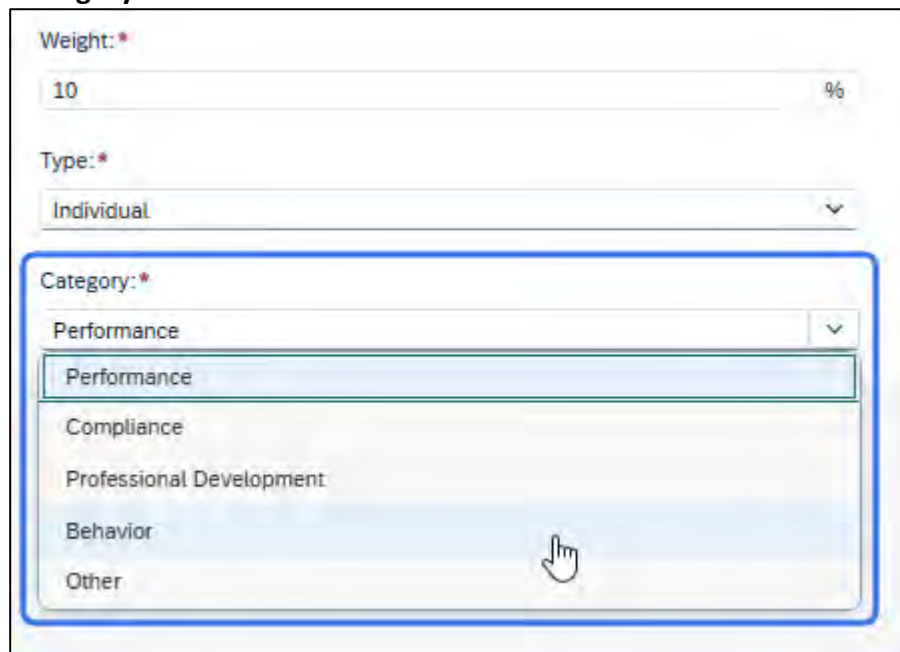
10 %

6. Select the **Type** of goal.



The screenshot shows a form with a 'Weight' field set to '10' and a '%' symbol. Below it, the 'Type' dropdown menu is open, showing a list of options: 'Department', 'Agency', 'Section', and 'Individual'. A blue box highlights the dropdown menu, and a mouse cursor is pointing at the 'Individual' option.

7. Select the goal **Category**.



The screenshot shows the same form as above, but with the 'Type' dropdown menu closed and 'Individual' selected. The 'Category' dropdown menu is now open, showing a list of options: 'Performance', 'Compliance', 'Professional Development', 'Behavior', and 'Other'. A blue box highlights the dropdown menu, and a mouse cursor is pointing at the 'Behavior' option.

8. After you have completed all of the fields, select **Save** at the bottom right of the screen.

**Create Performance Goal**

Goal Name\*  
Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.  
287 characters left (Legal Scan)

How will it be measured? \*  
The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.  
3770 characters left (Legal Scan)

Start Date\*  
Jan 1, 2027

Due Date\*  
Dec 31, 2027

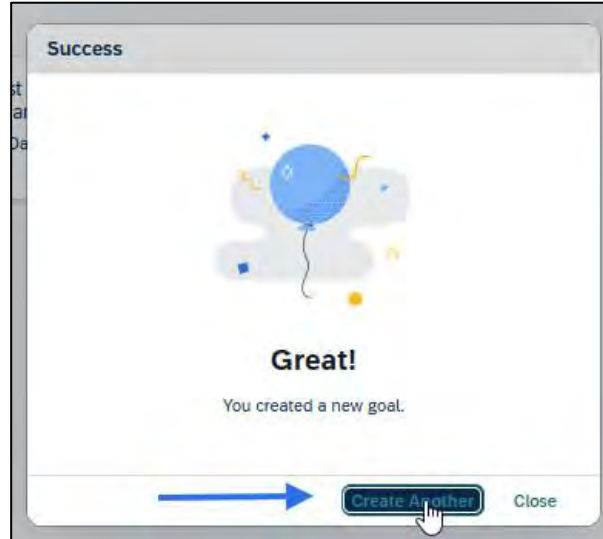
Weight\*  
10%

Type\*  
Individual

Category\*  
Behavior

Save Cancel

9. A confirmation message pops up to confirm the creation of the goal. Select **Create Another** to return to the goal creation options screen.

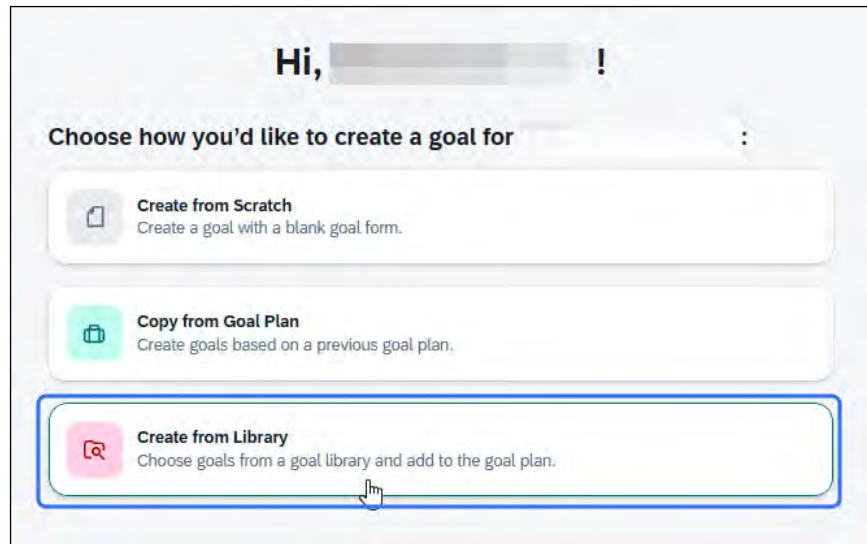


10. The goal has been added to the form. Select the pencil icon if you need to edit an existing goal.

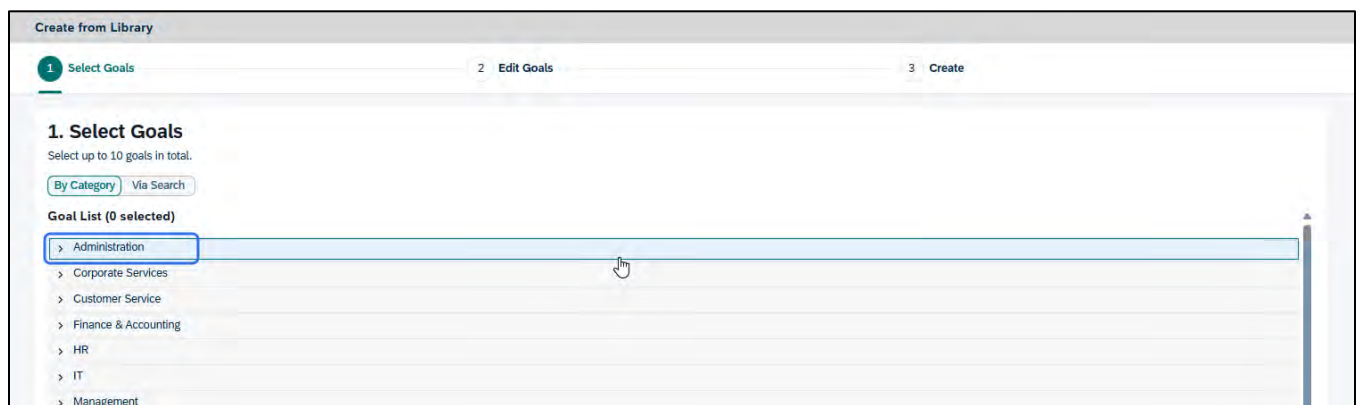
**NOTE:** Once you send this form to your 2nd Level Evaluator, the state of the goal plan changes to **Approved**, and **you cannot add, edit, or delete goals**.

## HOW TO CREATE GOALS FROM THE LIBRARY

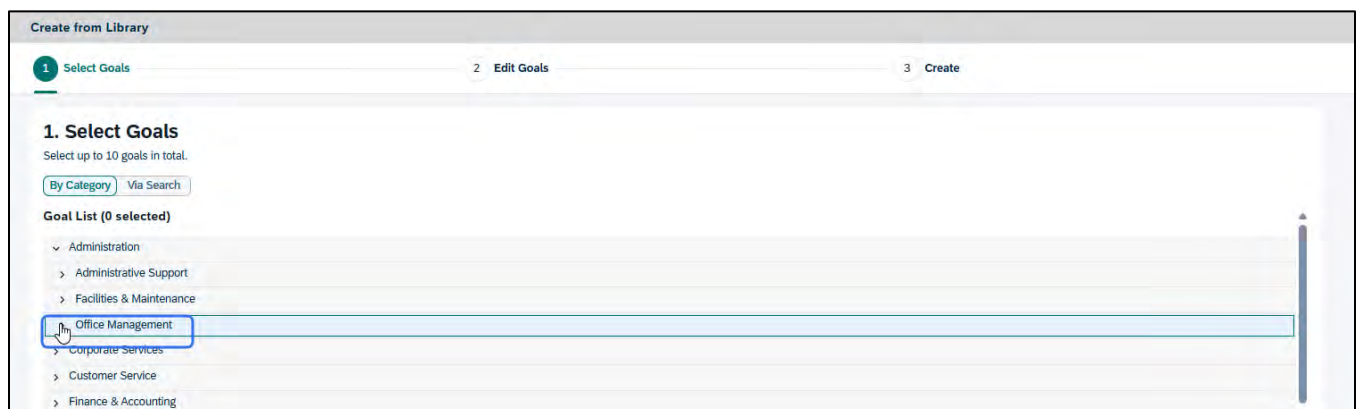
1. Select **Create Goal**. Then, select **Create from Library**.



2. Option 1: You can browse goals **By Category**. Select the > next to the appropriate category.



3. Then, select the > next to the appropriate sub-category.



4. Select the **box next to the goal** you would like to add. Then, select **Next**.

NOTE: You may add up to 10 goals at once from the library.

The screenshot shows the 'Create from Library' interface with three steps: 1. Select Goals, 2. Edit Goals, and 3. Create. Step 1 is active. The title is '1. Select Goals' with the instruction 'Select up to 10 goals in total.' Below this are two tabs: 'By Category' (selected) and 'Via Search'. A tree view on the left shows the hierarchy: Administration > Administrative Support > Facilities & Maintenance. Under 'Facilities & Maintenance', a list of goals is displayed. The goal 'Conduct \_\_\_ (#) of fire drills by (date)' is selected, and a blue box highlights the checkbox next to it. At the bottom right, there are 'Next' and 'Cancel' buttons, with a blue arrow pointing to the 'Next' button.

5. You must edit the goal. Select the **pencil icon**.

The screenshot shows the 'Create from Library' interface with three steps: 1. Select Goals, 2. Edit Goals, and 3. Create. Step 2 is active. The title is '2. Edit Goals' with the instruction 'Make changes to the selected goals as needed or instructed.' Below this is a text input field containing 'Conduct \_\_\_ (#) of fire drills by (date)'. A blue box highlights a pencil icon in the top right corner of the input field.

6. Most library goals have **blanks or details** in the Goal Name that need to be edited, so revise as necessary.

The screenshot shows the 'Create from Library' interface with three steps: 1. Select Goals, 2. Edit Goals, and 3. Create. Step 2 is active. The title is '2. Edit Goals' with the instruction 'Make changes to the selected goals as needed or instructed.' Below this is a 'Back' link. The 'Goal Name' field is labeled with a red asterisk and a blue box highlights the text 'Conduct \_\_\_ (#) of fire drills by (date)'. At the bottom right, it says '462 characters left Legal Scan'.

7. Edit the **metric** for how this goal will be measured.

Create from Library

1 Select Goals

2 Edit Goals

## 2. Edit Goals

Make changes to the selected goals as needed or instructed.

< Back

Goal Name\*: \*

Conduct 1 of fire drills each quarter

463 characters left Legal Scan

How will it be measured?: \*

The employee will track the dates, times, and results of each fire drill and provide a report within 2 weeks of the drill.

3877 characters left Legal Scan

8. Change the **Start Date** and/or **Due Date**, if necessary.

How will it be measured?: \*

The employee will track the dates, times, and results of each fire drill and provide a report within 2 weeks of the drill. The supervisor will review the report and address any issues.

3816 characters left Legal Scan

Start Date\*: \*

Jan 1, 2026

Due Date\*: \*

Dec 31, 2027

9. Add the **Weight** of the individual goal. The total weight of all **goals must equal 100%**.

Start Date\*: \*

Jan 1, 2027

Due Date\*: \*

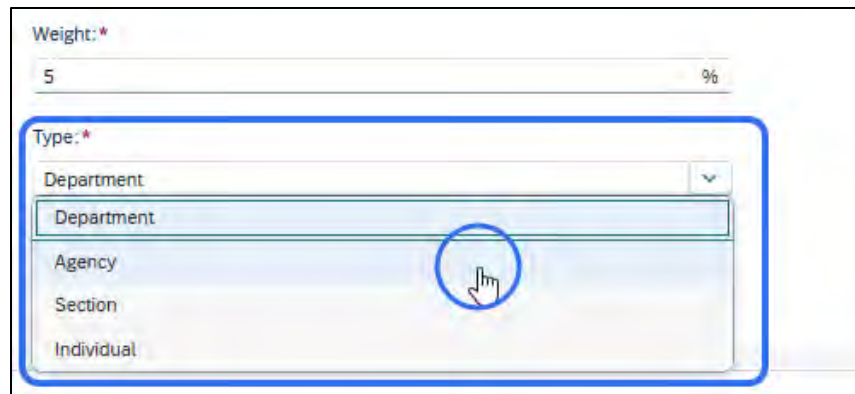
Dec 31, 2027

Weight\*: \*

0 %

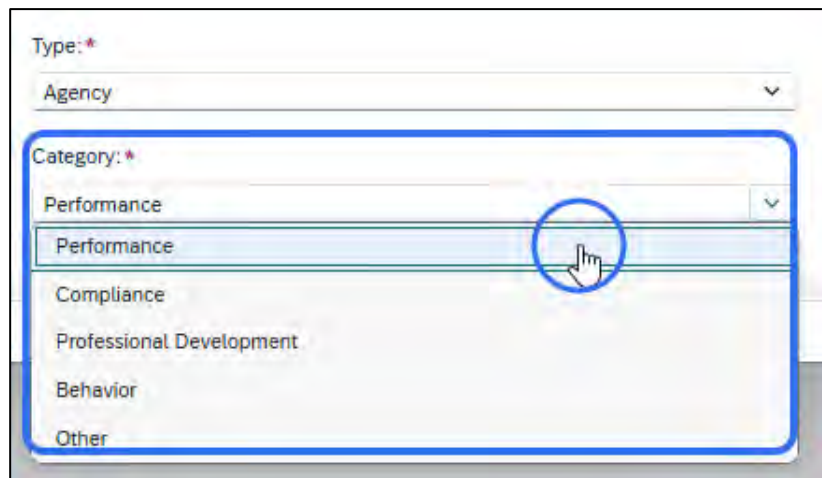
This field is required.

10. Select the **Type** of goal.



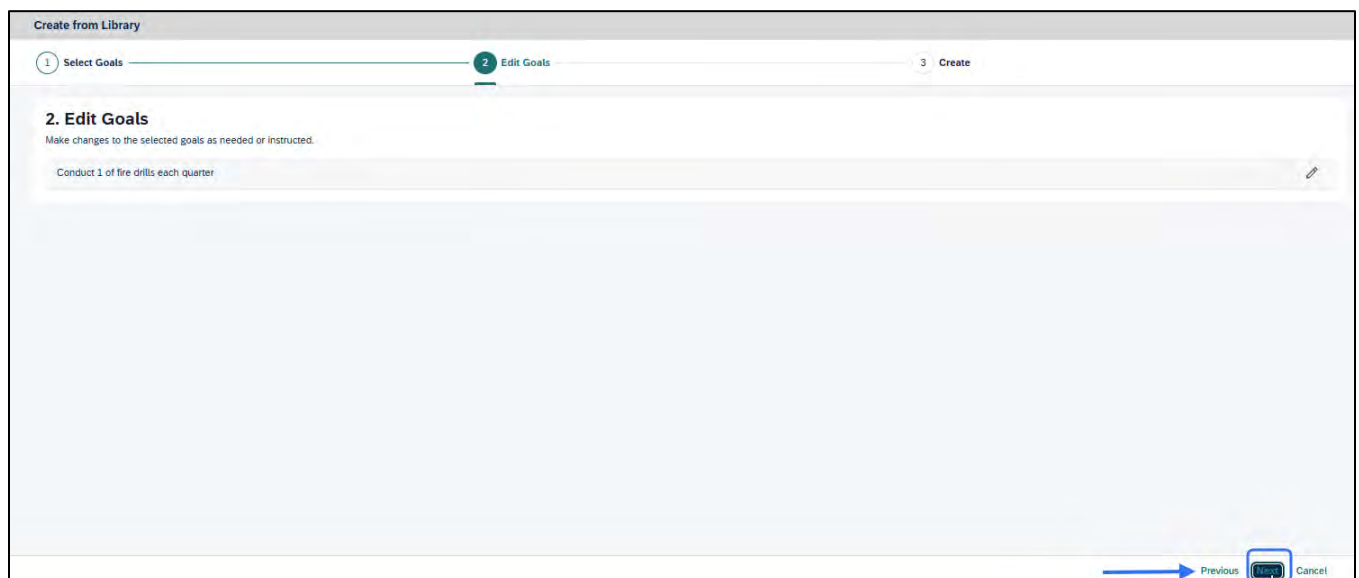
The screenshot shows a 'Weight: \*' field with the value '5' and a '%' symbol. Below it, the 'Type: \*' dropdown menu is open, displaying a list of options: 'Department', 'Agency', 'Section', and 'Individual'. A blue rectangular box highlights the entire dropdown menu, and a blue circle with a hand cursor icon is positioned over the 'Agency' option, indicating it is the selected item.

11. Select the goal **Category**. Then, select **Next** at the bottom right of the window.



The screenshot shows the 'Type: \*' dropdown menu set to 'Agency'. Below it, the 'Category: \*' dropdown menu is open, displaying a list of options: 'Performance', 'Compliance', 'Professional Development', 'Behavior', and 'Other'. A blue rectangular box highlights the entire dropdown menu, and a blue circle with a hand cursor icon is positioned over the 'Performance' option, indicating it is the selected item.

12. Select **NEXT** again.



The screenshot shows the 'Create from Library' window with three steps: '1. Select Goals', '2. Edit Goals', and '3. Create'. The '2. Edit Goals' step is active, showing a list of goals with the text 'Conduct 1 of fire drills each quarter'. At the bottom right, there are three buttons: 'Previous', 'Next', and 'Cancel'. The 'Next' button is highlighted with a blue square, indicating it is the selected option.

13. Select **SAVE**. The goal has been added to the Goal Plan and the CPM Planning Form.

Create from Library

1 Select Goals 2 Edit Goals 3 Create

**3. Create**  
Preview and create goals.

**Goals (1 Selected)**

Conduct 1 of fire drills each quarter

Previous **Save** Cancel

14. Option 2: Browse goals using **Via Search**.

Create from Library

1 Select Goals 2 Edit Goals

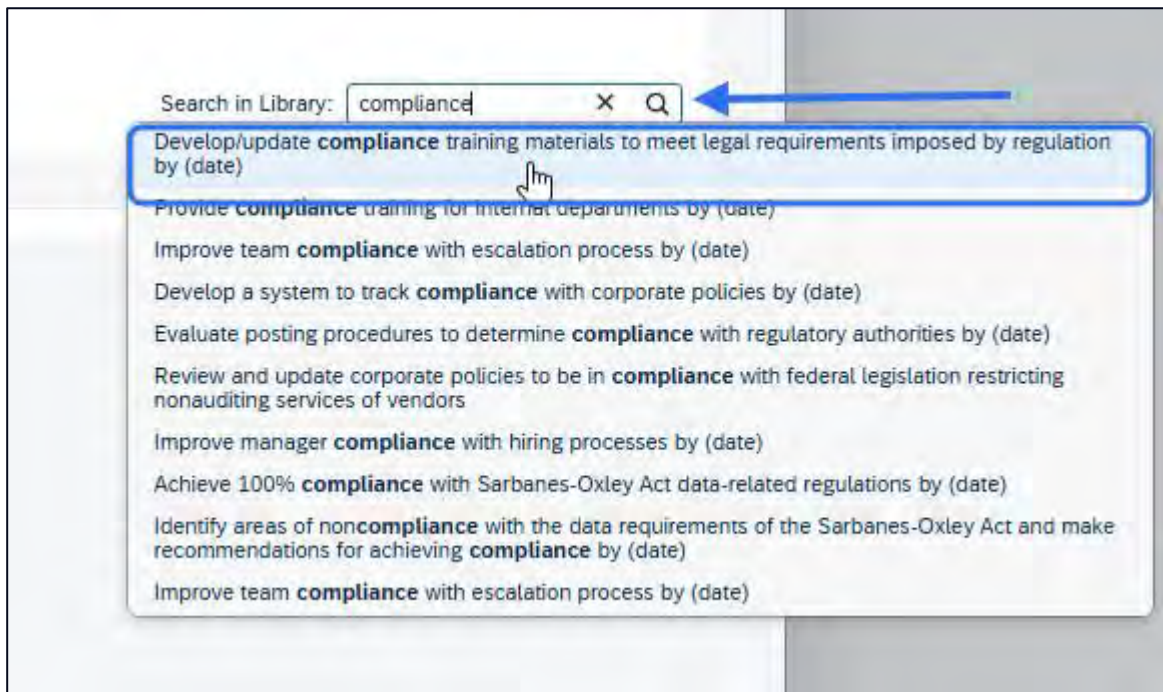
**1. Select Goals**  
Select up to 10 goals in total.

By Category **Via Search**

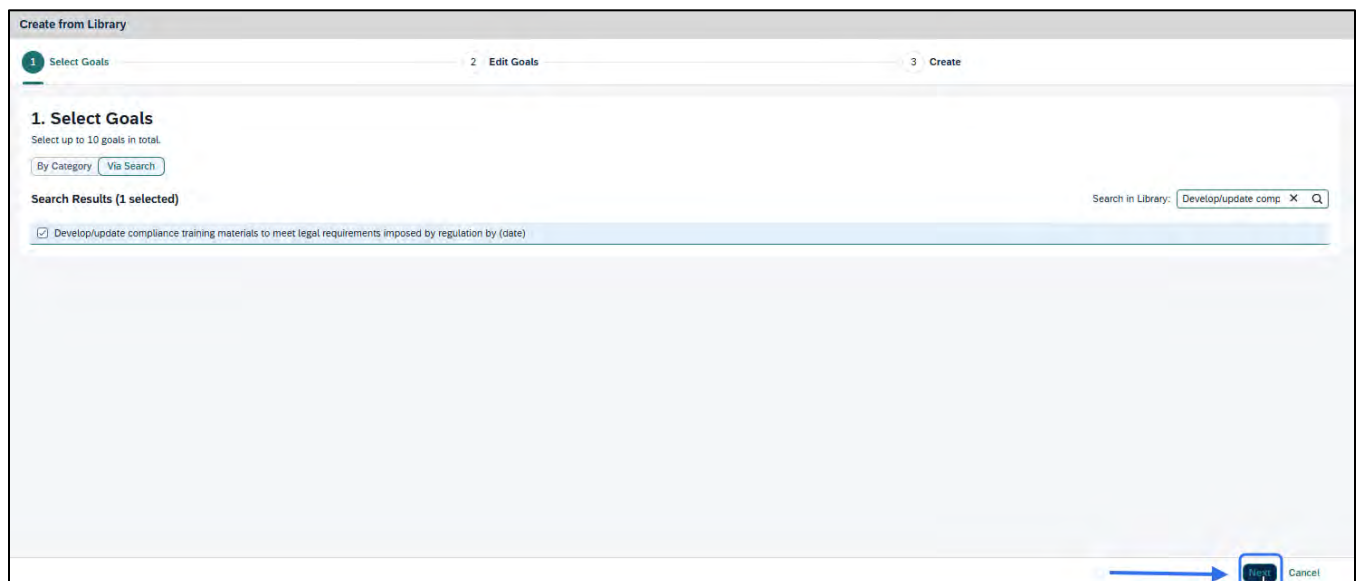
**Goal List (0 selected)**

- > Administration
- > Corporate Services
- > Customer Service
- > Finance & Accounting
- > HR
- > IT
- > Management
- > Manufacturing
- > Marketing

15. Type in your search term. A list of goals with your search term will appear. Select the goal you would like to add.



16. Select **NEXT**.

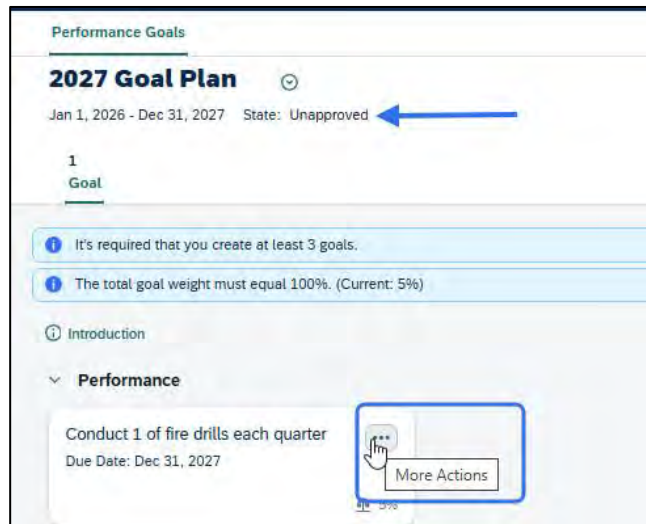


17. Repeat steps 5 - 13 to edit and add the goal to the Goal Plan and the Planning form.

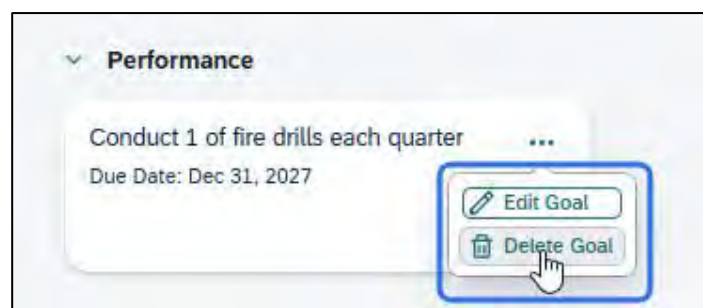
## GOAL PLAN – EDITING AND DELETING GOALS

Available actions depend on where the form is in the Route Map. Once the Planning form is approved by the 2<sup>nd</sup> Level Evaluator, the Goal Plan State changes to Approved. When the Goal Plan State is Approved, goals and/or forms may not be edited or deleted.

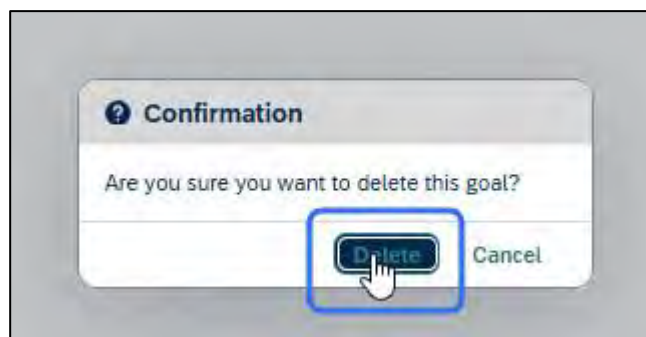
1. In the employee's Goal Plan, select the **three dots** on the Goal card.



2. From here, you can edit the goal or delete the goal.



3. If you choose to delete the goal, select **Delete** on the confirmation.

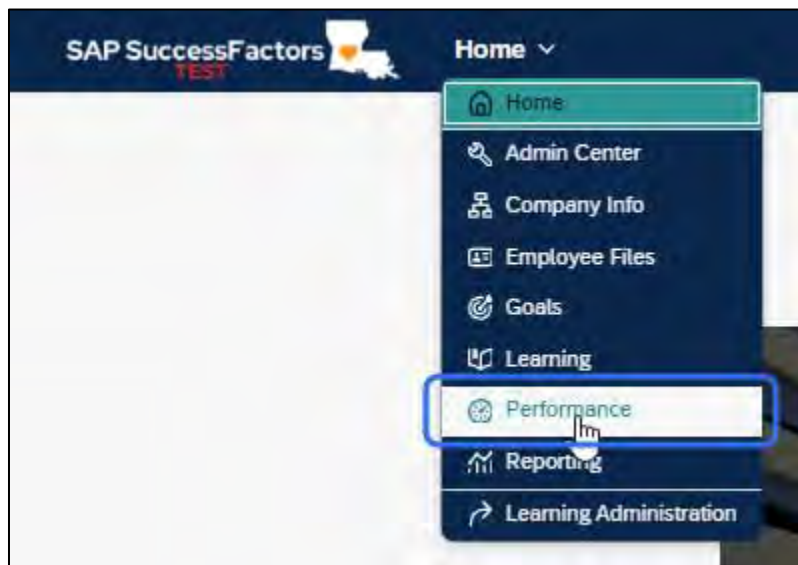


## WORKING IN YOUR PERFORMANCE/MY FORMS PAGE

The **Performance/My Forms** page is where supervisors access performance management forms for themselves and their employees. From this page, supervisors can open forms that are currently in process, review their status, continue working with them as they move through the CPM process, and organize or view completed forms for future reference.

### NAVIGATING YOUR PERFORMANCE / MY FORMS PAGE

1. Select **Performance** in the **Home** menu.



2. The default page is called **My Forms**. Here, all of the forms you are responsible for are stored. This includes your performance forms as well as your employees' performance forms.

**NOTE:** The default view shows any forms that are **In Progress** and need review. These forms require action on your part. The lock icon indicates the form is not yet available.

**My Forms**

**Inbox**

Template: All | Current Step: All | Group: All | All or Reports Only: All Employees | Employee: Search for employee

Organizational Unit: All | Work Parish: All | Org Unit Description: All | Pers Admin: All | Position: All

Position Start Date: All | Contract Type: All | Personnel Area ID: All

| Title                                     | Employee | Current Step                 | Date Assigned | Step Due Date | Form Start D... | Form End Date | Form Due... |
|-------------------------------------------|----------|------------------------------|---------------|---------------|-----------------|---------------|-------------|
| 2026 Alternative Performance Planning for |          | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  |
| 2026 Alternative Performance Planning for |          | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  |
| 2027 Performance Planning for             |          | Initial Planning: Supervisor | 09/14/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  |
| 2027 Performance Planning for             |          | Initial Planning: Supervisor | 09/17/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  |

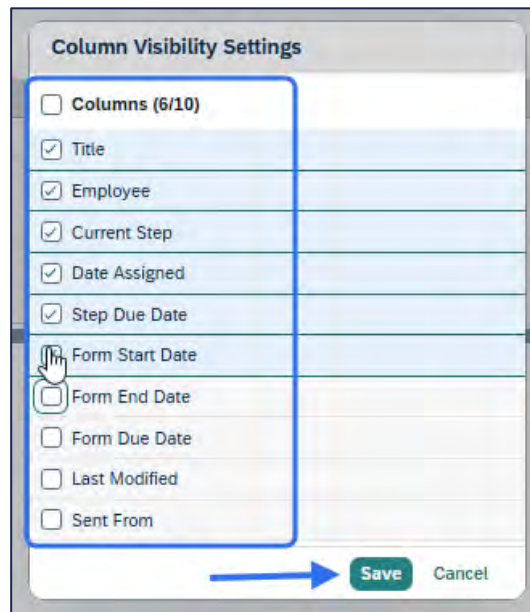
3. Select the **gear icon** to change the **Inbox Column Visibility Settings**.



The screenshot shows a table titled 'Forms (4)' with the following columns: Title, Employee, Current Step, Date Assigned, Step Due Date, Form Start D..., Form End Date, Form Due..., Last Modified, Sent From, and Actions. The 'Actions' column contains a gear icon, which is highlighted by a blue arrow and a blue box.

| Title                                                | Employee   | Current Step                 | Date Assigned | Step Due Date | Form Start D... | Form End Date | Form Due... | Last Modified | Sent From  | Actions     |
|------------------------------------------------------|------------|------------------------------|---------------|---------------|-----------------|---------------|-------------|---------------|------------|-------------|
| 2026 Alternative Performance Planning for [redacted] | [redacted] | Planning Discussion          | 09/22/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  | 09/22/2026    | [redacted] | [gear icon] |
| 2026 Alternative Performance Planning for [redacted] | [redacted] | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  | 09/15/2026    | [redacted] | [gear icon] |
| 2027 Performance Planning for [redacted]             | [redacted] | Initial Planning: Supervisor | 09/14/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  | 09/14/2026    | [redacted] | [gear icon] |
| 2027 Performance Planning for [redacted]             | [redacted] | Initial Planning: Supervisor | 09/17/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  | 09/18/2026    | [redacted] | [gear icon] |

4. In this window, **deselect the columns** you want to hide. Then, select **Save**.



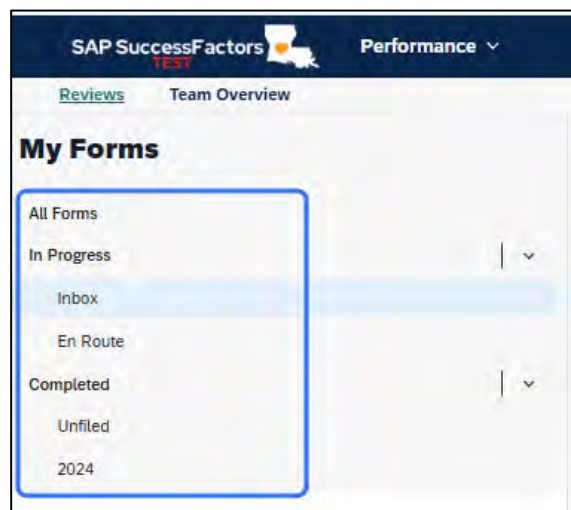
The screenshot shows the 'Column Visibility Settings' dialog box. It has a list of columns with checkboxes next to them. The 'Form Start Date' checkbox is being clicked by a mouse cursor. The 'Save' button is highlighted with a blue arrow.

| Column Visibility Settings                          |
|-----------------------------------------------------|
| <input type="checkbox"/> Columns (6/10)             |
| <input checked="" type="checkbox"/> Title           |
| <input checked="" type="checkbox"/> Employee        |
| <input checked="" type="checkbox"/> Current Step    |
| <input checked="" type="checkbox"/> Date Assigned   |
| <input checked="" type="checkbox"/> Step Due Date   |
| <input checked="" type="checkbox"/> Form Start Date |
| <input type="checkbox"/> Form End Date              |
| <input type="checkbox"/> Form Due Date              |
| <input type="checkbox"/> Last Modified              |
| <input type="checkbox"/> Sent From                  |

**Save** **Cancel**

5. Using the left sidebar, you may also view **All Forms**, forms **In Progress**, and **Completed** forms.

NOTE: **En Route** shows a copy of the form from the last time you altered it. Real-time updates are not available nor can you see any changes made by the individual who has the form.



The screenshot shows the SAP SuccessFactors Performance 'My Forms' sidebar. It has a list of form categories: All Forms, In Progress, Inbox, En Route, Completed, Unfiled, and 2024. The 'In Progress' category is highlighted with a blue box.

**My Forms**

- All Forms
- In Progress
- Inbox
- En Route
- Completed
- Unfiled
- 2024

6. You can use the **Search box** to find a specific employee using multiple parameters, such as **Subject (Name)**, **Organizational Unit**, **Work Parish**, etc. Use the drop-down menus to select search parameters. Then, select **Go** in the top right corner of the box.

The screenshot shows the 'Inbox' search interface in SAP SuccessFactors Performance. The search filters are set to 'All' for most categories. The 'Employee' field has a search icon. The 'Go' button is highlighted in the top right corner.

| Title                                     | Employee | Current Step                 | Date Assigned | Step Due Date | Form Start D... | Form End Date | Form Due... | Last Modified | Sent From | Actions |
|-------------------------------------------|----------|------------------------------|---------------|---------------|-----------------|---------------|-------------|---------------|-----------|---------|
| 2026 Alternative Performance Planning for |          | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  | 09/18/2026    |           |         |
| 2026 Alternative Performance Planning for |          | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  | 09/15/2026    |           |         |
| 2027 Performance Planning for             |          | Initial Planning: Supervisor | 09/14/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  | 09/14/2026    |           |         |
| 2027 Performance Planning for             |          | Initial Planning: Supervisor | 09/17/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  | 09/18/2026    |           |         |

7. To search using an employee's name, either type the employee's name in the field or select the search icon. Then, select **Go**.

The screenshot shows the 'Inbox' search interface in SAP SuccessFactors Performance. The 'Employee' field now contains the name 'NATHAN BARIABA'. The search icon is highlighted with a red box.

8. The current forms associated with that employee will be listed. Completed forms may be found in the **Completed** folder.

The screenshot shows the 'My Forms' view in SAP SuccessFactors Performance. The 'Inbox' folder is selected, showing a list of forms for the employee 'NATHAN BARIABA'. The 'Completed' folder is visible in the left sidebar.

| Title                                     | Employee | Current Step                 | Date Assigned | Step Due Date | Form Start D... | Form End Date | Form Due... | Last Modified | Sent From | Actions |
|-------------------------------------------|----------|------------------------------|---------------|---------------|-----------------|---------------|-------------|---------------|-----------|---------|
| 2026 Alternative Performance Planning for |          | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | 10/24/2025      | 12/31/2026    | 11/14/2026  | 09/18/2026    |           |         |
| 2027 Performance Planning for             |          | Initial Planning: Supervisor | 09/17/2026    | 03/01/2027    | 01/01/2027      | 12/31/2027    | 03/01/2027  | 09/18/2026    |           |         |

9. To return to the default view and see all forms in your Inbox, clear the Subject field by selecting the **X** next to the employee's name. Then, select **Go** to return to your Inbox.

The screenshot shows a web interface with several filter sections and a search bar. The filters are arranged in a grid:

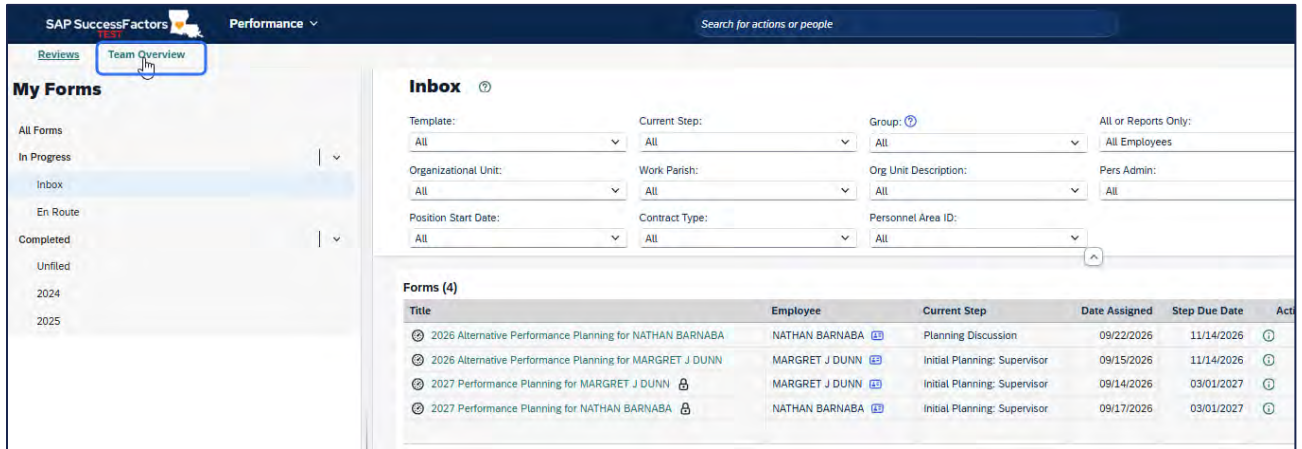
- All or Reports Only:** A dropdown menu with "All Employees" selected.
- Pers Admin:** A dropdown menu with "All" selected.
- Employee:** A search bar with a blue box around the "X" icon and a blue arrow pointing to the "Go" button.
- Position:** A dropdown menu with "All" selected.
- Personnel Area Description:** A dropdown menu with "All" selected.
- EE Sub Grp:** A dropdown menu with "All" selected.

At the top right, there are two buttons: "Go" (green) and "Reset" (grey).

## USING TEAM OVERVIEW

Another method for navigating to performance forms is to use the **Team Overview**. This view provides a snapshot of your employees and the current forms related to them.

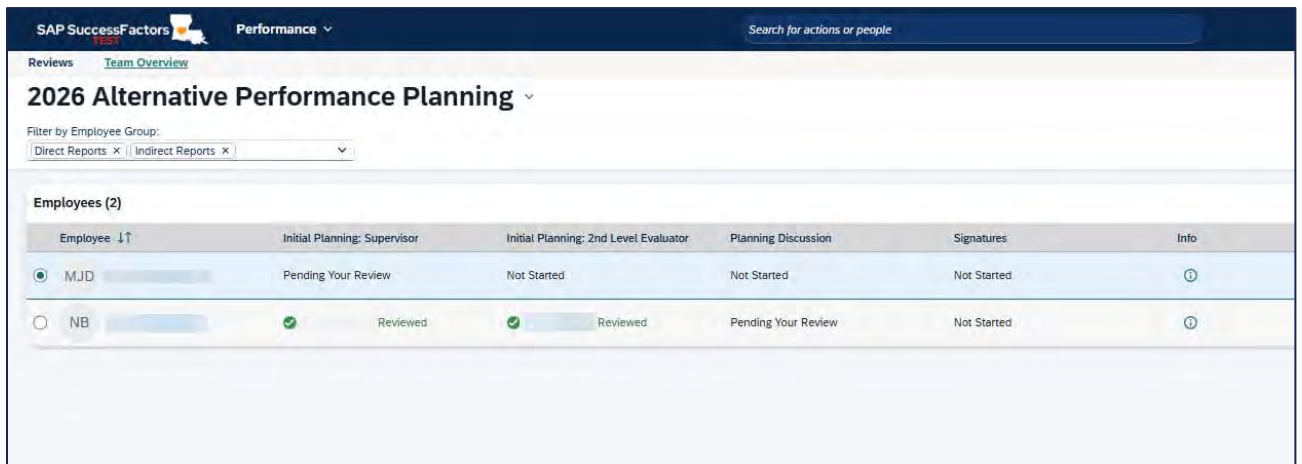
1. From your **My Forms/Inbox**, select **Team Overview** at the top of the page.



The screenshot shows the SAP SuccessFactors Performance interface. On the left, under 'My Forms', the 'Inbox' tab is selected. At the top, the 'Team Overview' link is highlighted with a red box. The main area displays the 'Inbox' for the selected form type, '2026 Alternative Performance Planning'. It includes filters for Template, Current Step, Group, and All or Reports Only. Below the filters, a table lists the forms with columns for Title, Employee, Current Step, Date Assigned, Step Due Date, and Actions.

| Title                                                    | Employee       | Current Step                 | Date Assigned | Step Due Date | Actions |
|----------------------------------------------------------|----------------|------------------------------|---------------|---------------|---------|
| 2026 Alternative Performance Planning for NATHAN BARNABA | NATHAN BARNABA | Planning Discussion          | 09/22/2026    | 11/14/2026    | ⓘ       |
| 2026 Alternative Performance Planning for MARGRET J DUNN | MARGRET J DUNN | Initial Planning: Supervisor | 09/15/2026    | 11/14/2026    | ⓘ       |
| 2027 Performance Planning for MARGRET J DUNN             | MARGRET J DUNN | Initial Planning: Supervisor | 09/14/2026    | 03/01/2027    | ⓘ       |
| 2027 Performance Planning for NATHAN BARNABA             | NATHAN BARNABA | Initial Planning: Supervisor | 09/17/2026    | 03/01/2027    | ⓘ       |

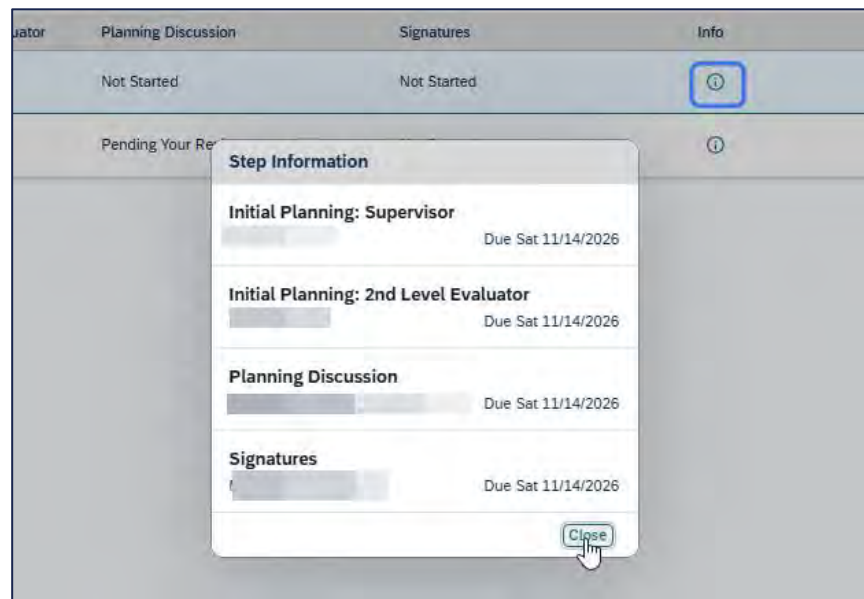
2. The **Team Overview** shows where your employees are in the performance process for the form type displayed at the top of the page. Each column represents a step in the process, and the status shows whether the form is awaiting action, completed, or not yet started.



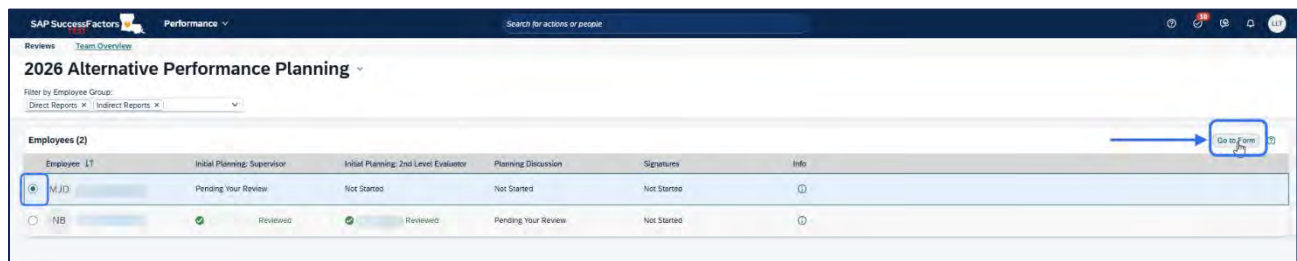
The screenshot shows the 'Team Overview' view for the '2026 Alternative Performance Planning' form type. It includes a filter for 'Employee Group' and a table showing the progress of the form for two employees: MJD and NB. The table has columns for Employee, Initial Planning: Supervisor, Initial Planning: 2nd Level Evaluator, Planning Discussion, Signatures, and Info.

| Employee | Initial Planning: Supervisor | Initial Planning: 2nd Level Evaluator | Planning Discussion | Signatures  | Info |
|----------|------------------------------|---------------------------------------|---------------------|-------------|------|
| MJD      | Pending Your Review          | Not Started                           | Not Started         | Not Started | ⓘ    |
| NB       | Reviewed                     | Reviewed                              | Pending Your Review | Not Started | ⓘ    |

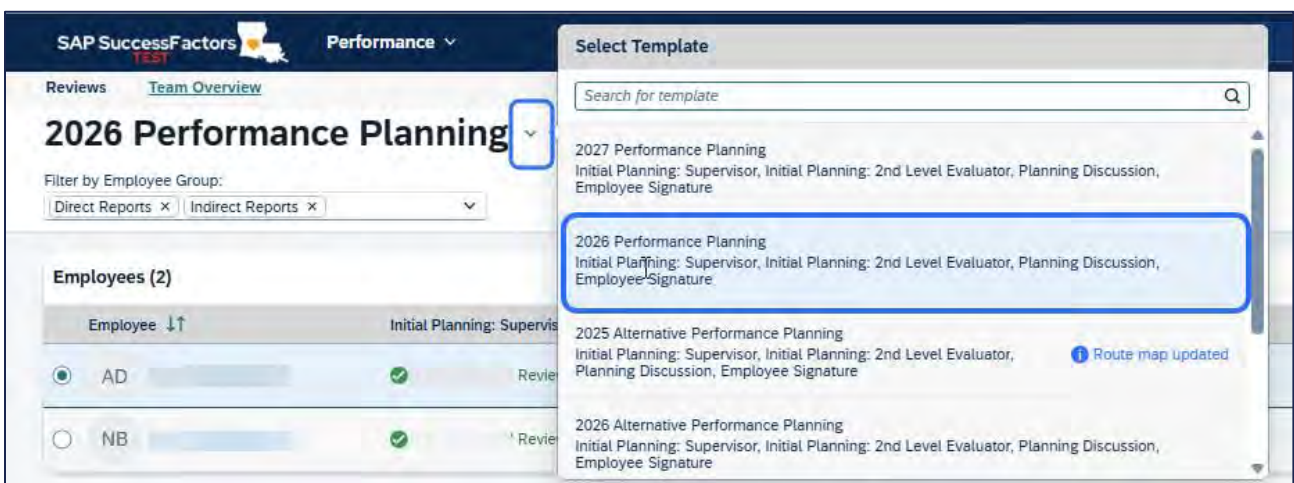
3. Select the **information icon** to view the Step Information in detail. This includes the steps, the individuals involved, and the due dates for each step.



4. To open a form from the Team Overview, select the button next to the employee's name. Then, select **Go to Form**.



5. Use the **drop-down menu** to select a different form template i.e., different types of forms and/or forms from different years.



## UNDERSTANDING THE PERFORMANCE PLANNING FORM

1. This is the view of the **Form Details** for a Planning form.

In the top right corner, you have multiple options:

- **History** displays the form and additional information including the form originator, review dates, a document list for this employee, etc.
- Under **Actions**, you have the option to **Legal Scan** the Form or **View Form Information**.
  - A **Legal Scan** checks the form for any questionable or potentially inappropriate language.
  - **View Form Information** provides an **Audit Trail** and **Properties** for the form.
- You may select **Print & PDF** to either print or save a copy of the form.

The **buttons on the bottom right** display the actions you may take with this form. You can **Save and Close** at any time. Also, if the form is incomplete, it will not advance to the next step.

NOTE: Pay attention to any messages at the top of the screen. In this example, the message reads “You are in a collaborative step where the form is sent to all participants, but only one person can edit it at a time. While you’re editing, others have read-only access. If you want to close the form temporarily, be sure to use the Save and Close button. Otherwise, the form will stay in read-only mode for others for 35 minutes.”

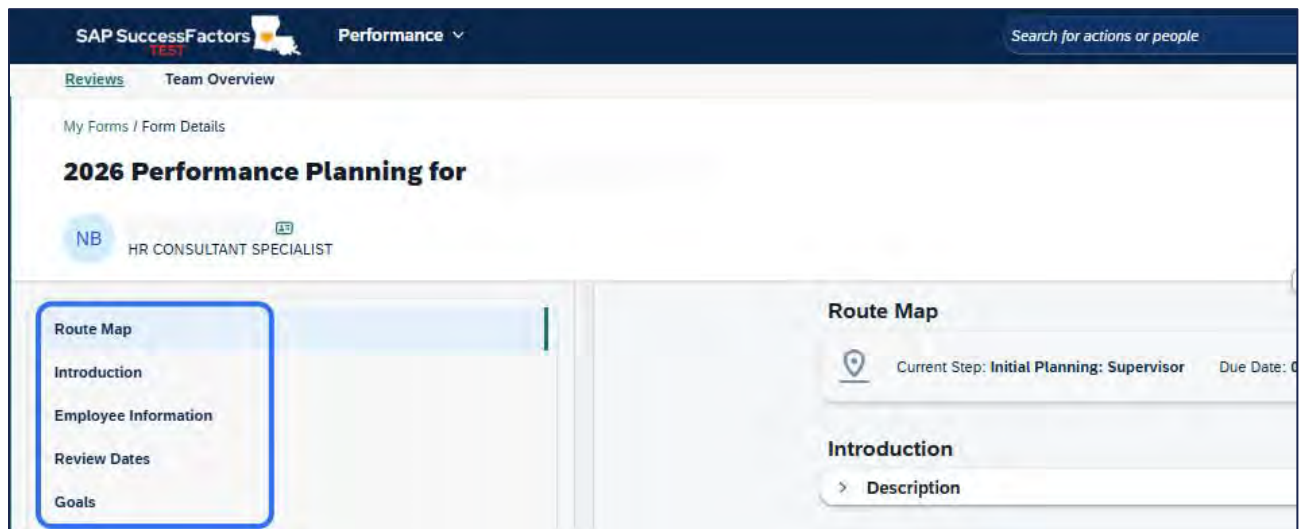
This message is true for any Collaborative step. If you try to open a form and get a message that it is locked, the other person in the step has the form open or has not properly closed it. Wait 35 minutes and you will have access to the form.

The screenshot shows the SAP SuccessFactors Performance Planning Form Details view. The top navigation bar includes 'SAP SuccessFactors', 'Performance', and a search bar. The left sidebar shows the 'Route Map' with sections: Introduction, Employee Information, Review Dates, and Goals. The main content area displays the form details for a 2026 Performance Planning form for an HR Consultant Specialist. The form is currently in the 'Initial Planning: Supervisor' step, with a due date of 03/01/2026. The next step is 'Initial Planning: 2nd Level Evaluator'. The form includes sections for Employee Information, Review Dates, and Goals. The Goals section lists four goals with weights: 20%, 30%, 40%, and 10%.

| Goal                                                                                                 | Weight |
|------------------------------------------------------------------------------------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |
| Create 5 eLearning classes with minimal assistance by December 31, 2026.                             | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |

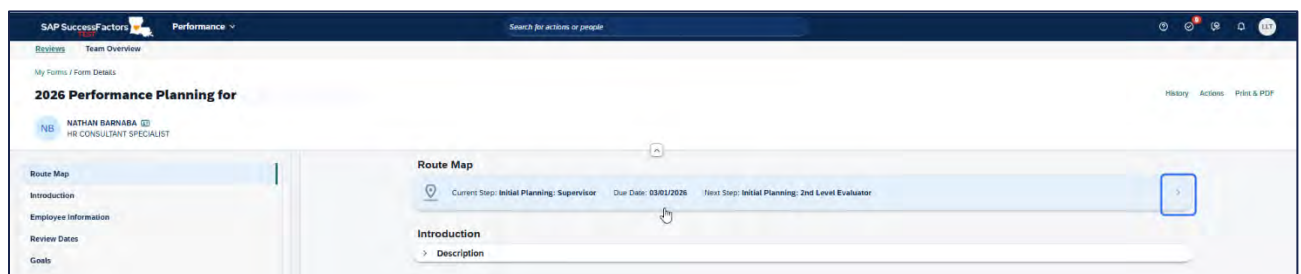
At the bottom right, there are buttons for 'Save and Send to 2nd Level Evaluator', 'Save and Close', and 'Save'.

2. Use the **Form Navigation panel** on the left to navigate to a specific section of the form.



The screenshot shows the SAP SuccessFactors Performance interface. The top navigation bar includes the SAP SuccessFactors logo, a 'Performance' dropdown, and a search bar. Below the navigation bar, there are tabs for 'Reviews' and 'Team Overview'. The main content area is titled 'My Forms / Form Details' and '2026 Performance Planning for'. A user profile for 'NB HR CONSULTANT SPECIALIST' is displayed. On the left, a 'Form Navigation panel' is visible, listing sections: 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', and 'Goals'. The 'Route Map' section is highlighted with a blue box. On the right, the 'Route Map' section is expanded, showing 'Current Step: Initial Planning: Supervisor' and 'Due Date: 03/01/2026'. Below this, the 'Introduction' section is expanded, showing a 'Description' link.

3. The Route Map section indicates the Current Step, the Due Date for that step, and the Next Step in the form workflow. **Select the Route Map box or the arrow on the left** to view the Route Map details.



The screenshot shows the SAP SuccessFactors Performance interface with the 'Route Map' section expanded. The 'Route Map' section displays the 'Current Step: Initial Planning: Supervisor', 'Due Date: 03/01/2026', and 'Next Step: Initial Planning: 2nd Level Evaluator'. A blue box highlights the 'Route Map' section header on the left. A mouse cursor is pointing at the 'Route Map' section header. Below the 'Route Map' section, the 'Introduction' section is expanded, showing a 'Description' link.

4. Select **Show More/Show Less** to toggle the entire Route Map. Select the **X** to close the panel.

NOTE: The expanded Route Map contains information about the entire workflow.

- The circle(s) with a check indicate that step has been completed. The grey circle indicates where the form is (In Progress) in the Route Map. The white circle(s) indicate the steps not completed.
- Single-Role Step means only 1 person is responsible for completing this step. Collaborative Step indicates multiple people are responsible for tasks within this step. Also, everyone in the Collaborative Step receives the form at the same time.
- The Role and Name of the individual(s) are also displayed in this view.

**Route Map**

Actions ▾

Step 1 Assessment: Initial Planning: Supervisor  
Due 03/01/2026  
Single-Role Step In Progress  
Supervisor: \_\_\_\_\_

Step 2 Assessment: Initial Planning: 2nd Level Evaluator  
Due 03/01/2026  
Single-Role Step Not Started  
2nd Level Manager: \_\_\_\_\_

Step 3 Assessment: Planning Discussion  
Due 03/01/2026  
Collaborative Step Not Started  
Supervisor: \_\_\_\_\_ Employee: \_\_\_\_\_

Step 4 Signature: Employee Signature  
Due 03/01/2026  
Single-Role Step Not Started  
Manager signs and approves form  
Employee: \_\_\_\_\_

Step 5 Completed: Completion

Show Less

5. Under Introduction, select the **Description box** or the **arrow to the left** to expand this box. Here you can read the form description and open links related to the form, such as the SCS Chapter 10 Rules.

**Route Map**

Current Step: Initial Planning: Supervisor Due Date: 03/01/2026 Next Step: Initial Planning: 2nd Level Evaluator

**Introduction**

**Description**

Welcome to the 2026 CPM Performance Planning Form. State Civil Service (SCS), together with the Office of Technology Services (OTS), has developed this tool with the purpose of providing state employees with clear and transparent performance goals, as well as to provide agency leadership with a comprehensive system that facilitates performance management, performance development, and accountability. 2026 is the second year of system implementation, and the first year that supervisors will both evaluate and plan their employees in CPM. In year 2, you will begin to see some of the features of the CPM system that may not have been available or visible for 2025. These features include the ability for supervisors to choose goals from 2025 that continue to apply in 2026. This should make time spent creating goals much faster in many cases. Additionally, supervisors should see streamlined goal categories that include only performance and behavior goals. Chapter 10 of the State Civil Service Rules provides the framework for all classified employees using this system, and defines the roles and processes used in evaluating performance and performance planning. CPM fulfills those rules and will allow supervisors, 2nd level evaluators, and employees to track and create planning and evaluation forms online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating performance evaluation, please see [Chapter 10 here](#). For more information and resources about the CPM system, click [here](#). CPM training may also be found in LaGov Learning.

6. At this stage in the process, the form displays **Employee Information** and the **Review Dates**.

**Route Map**

Current Step: Initial Planning: Supervisor Due Date: 03/01/2026 Next Step: Initial Planning: 2nd Level Evaluator

**Introduction**

> Description

**Employee Information**

|                             |                                      |                          |                      |
|-----------------------------|--------------------------------------|--------------------------|----------------------|
| First Name:                 | Last Name:                           | Job Title:               | Job Code:            |
|                             |                                      | HR CONSULTANT SPECIALIST | 00170870             |
| Personnel Area Description: | Org Unit Description:                | User Number:             | Position Start Date: |
| CS-State Civil Service      | SCS-LEARNING, PERFORMANCE, & CULTURE | P00323795                | 09/24/2018           |

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2026 - 12/31/2026 | 03/02/2026 |

NOTE: Once the form is approved by the 2<sup>nd</sup> Level Evaluator, an additional section appears. (We discuss this in detail in [Documenting the Planning Discussion](#) section of this manual.)

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2026 - 12/31/2026 | 03/02/2026 |

**Planning Discussion**

Date of Planning Discussion \*

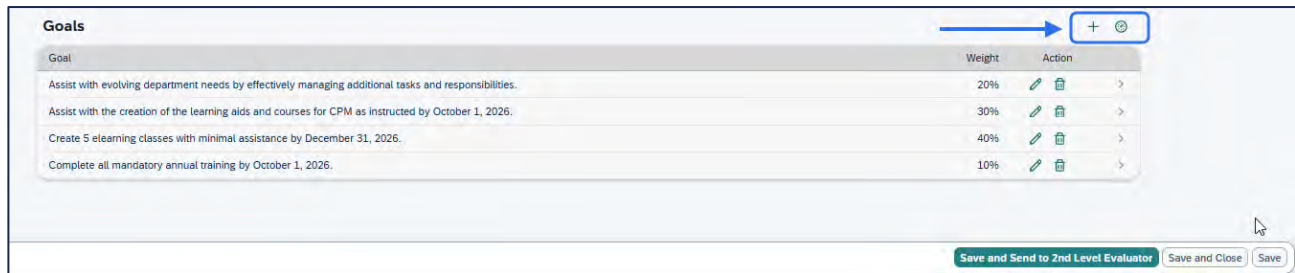
e.g. 2026-12-31

Results of Planning Discussion\*

Supervisor's Signature\*

Enter your text

7. In the Goals section of the form, the **Goal Name** and **Weight** are displayed. If the form has not been sent to the 2<sup>nd</sup> Level Evaluator, you may still add, edit, or delete goals. Select the **+ sign** to create goals. Select the **gauge icon** to review the **Rating Scale**.

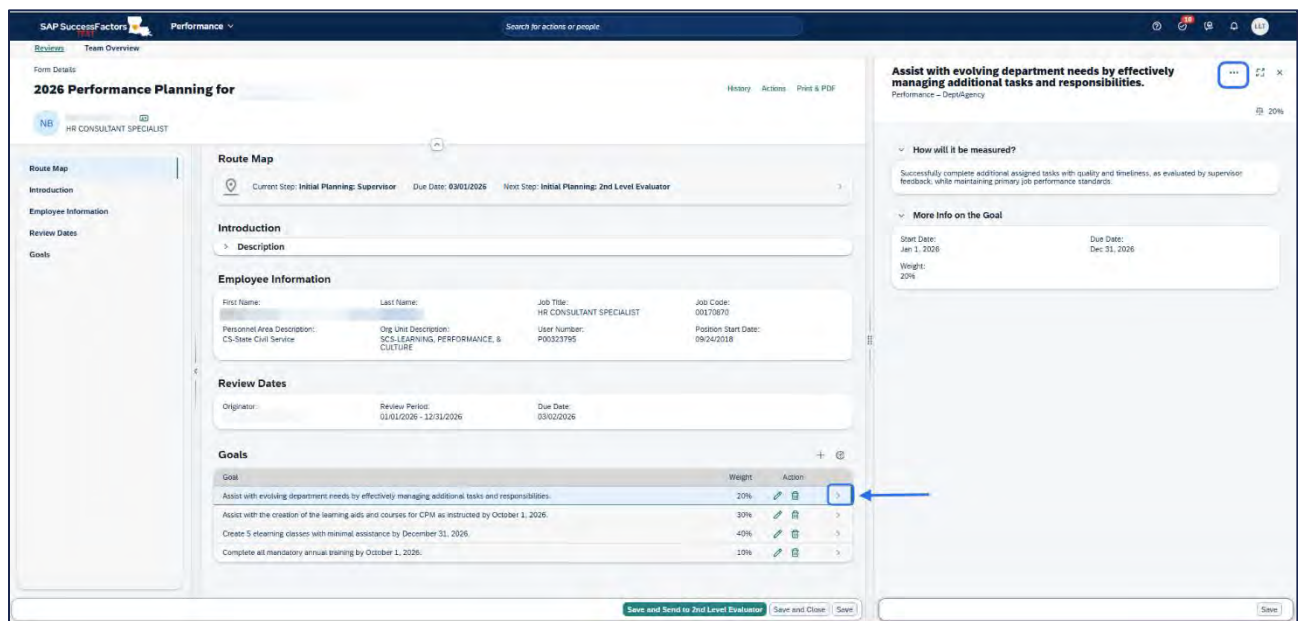


**Goals**

| Goal                                                                                                 | Weight | Action |
|------------------------------------------------------------------------------------------------------|--------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |        |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |        |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |        |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |        |

Save and Send to 2nd Level Evaluator Save and Close Save

8. Select the **arrow on the left of the goal** to view additional goal information. You may also edit and delete goals from this window. Select the **3 dots at the top of the box** and then select the appropriate action.



**2026 Performance Planning for**

HR CONSULTANT SPECIALIST

**Route Map**

Current Step: Initial Planning: Supervisor Due Date: 03/01/2026 Next Step: Initial Planning: 2nd Level Evaluator

**Introduction**

Description

**Employee Information**

First Name: Last Name: Job Title: HR CONSULTANT SPECIALIST Job Code: 00170879  
 Personnel Area Description: CS-Sales Civil Service Org Unit Description: SCS-LEARNING, PERFORMANCE, & CULTURE User Number: P0033795 Position Start Date: 09/24/2018

**Review Dates**

Originator: Review Period: 01/01/2026 - 12/31/2026 Due Date: 03/02/2026

**Goals**

| Goal                                                                                                 | Weight | Action |
|------------------------------------------------------------------------------------------------------|--------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |        |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |        |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |        |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |        |

Save and Send to 2nd Level Evaluator Save and Close Save

**Assist with evolving department needs by effectively managing additional tasks and responsibilities.**

Performance - DeptAgency

How will it be measured?  
 Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

More info on the Goal

Start Date: Jan 1, 2026 Due Date: Dec 31, 2026  
 Weight: 20%

9. A new window opens and allows you to edit the goal fields, as needed.

NOTE: The 2027 form will have both Type and Category for each goal. If you cannot add, edit, or delete a goal, [check the Goal State to ensure the Goal Plan is Unapproved](#).

The screenshot shows a window titled "Edit Performance Goal" with the following fields and content:

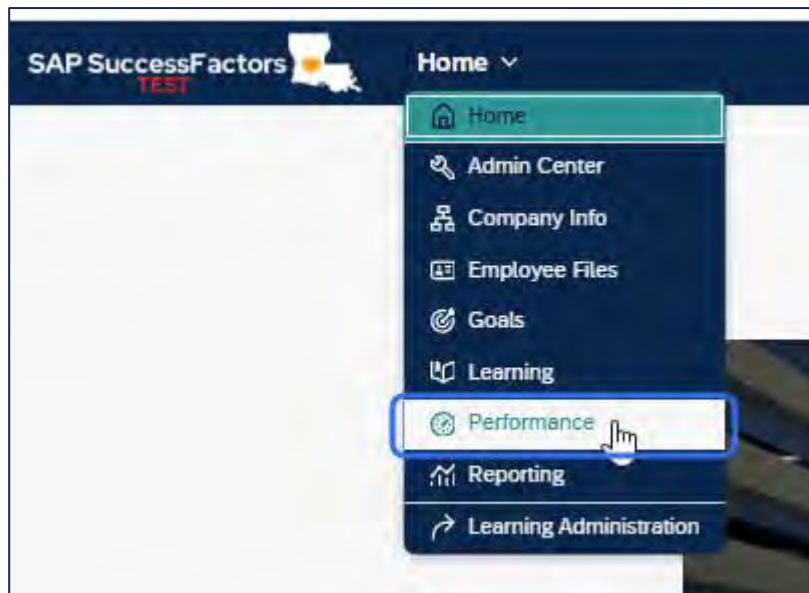
- Goal Name: \***: A text area containing "Assist with evolving department needs by effectively managing additional tasks and responsibilities." with a character count of "400 characters left Legal Scan".
- How will it be measured?: \***: A text area containing "Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards." with a character count of "3834 characters left Legal Scan".
- Start Date: \***: A date field set to "Jan 1, 2026".
- Due Date: \***: A date field set to "Dec 31, 2026".
- Weight: \***: A numeric field set to "20" with a percentage sign.
- Category: \***: A dropdown menu showing "Performance - Dept/Agency".
- Buttons**: "Save" and "Cancel" buttons at the bottom right.

## ADDING GOALS TO THE PERFORMANCE PLANNING FORM

Goals may be added through either the **Goal Plan** or the **Performance Planning Form**. However, supervisors are encouraged to use the Goal Plan because it provides additional options for creating and managing goals, including the ability to copy goals from a previous Goal Plan.

Regardless of where a goal is added, it will appear in both the Goal Plan and the Performance Planning Form.

1. Select **Performance** in the **Home** menu.



2. Select the **link for the employee's form** for whom you want to create a goal.

NOTE: Your Inbox may look different, based on your display settings.

A screenshot of the SAP SuccessFactors Performance Planning Inbox. The top section contains various filters for Template, Current Step, Group, All or Reports Only, Employee, and Personnel Area Description. Below the filters is a table titled 'Forms (4)' with columns: Title, Employee, Current Step, Date Assigned, Step Due Date, and Actions. The first row is highlighted with a blue box. The table contains four rows of data, each representing a performance planning form for a supervisor.

3. Select **Goals** or scroll down to the Goals section of the form. Select the **+** sign to add a goal.

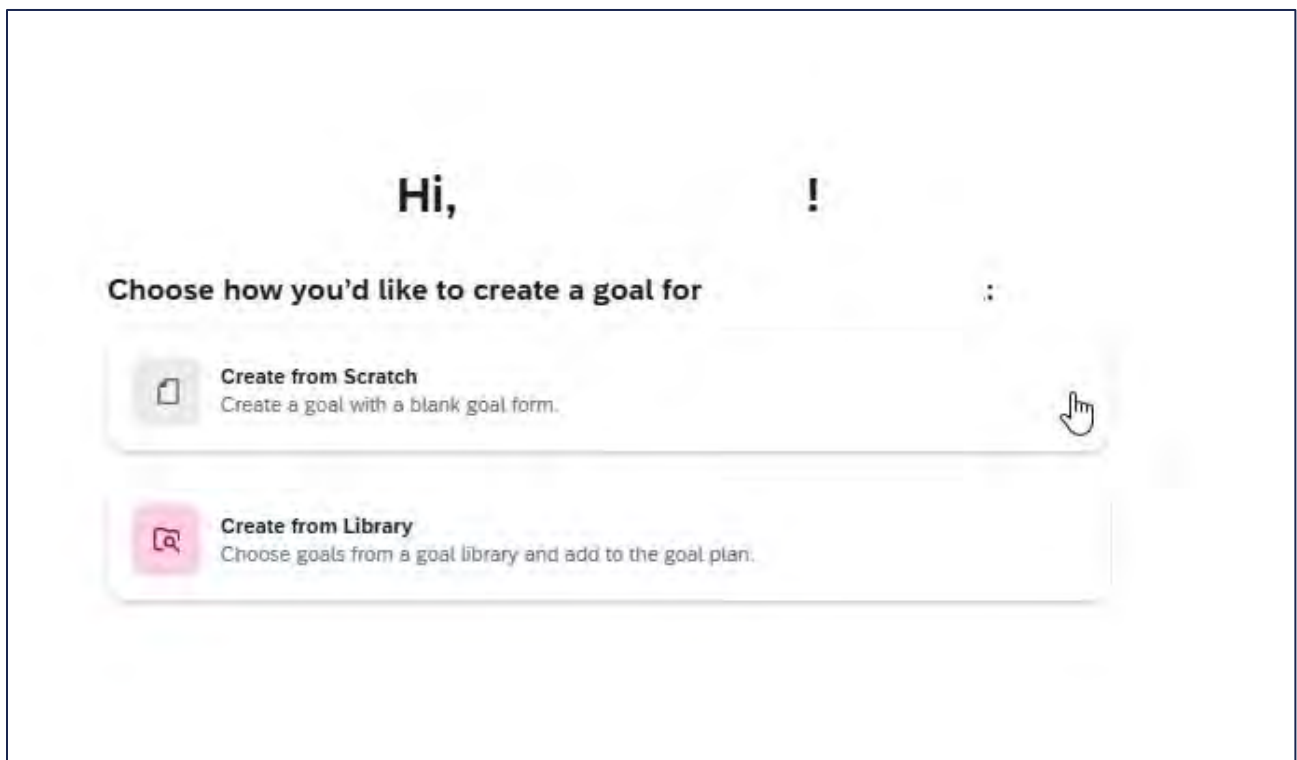


| Goals                                                                                                |        |                                                                                                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Goal                                                                                                 | Weight | Action                                                                                                                                                                                                                                                      |
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |    |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |    |

4. You have 2 options to create a goal for your employee in the Planning Form:

- **Create from Scratch:** This option allows you to make up your own goal and assign any metrics you want.
- **Create from Library:** This option allows you to select a goal from an organized library with suggested metrics.

**NOTE:** You cannot copy goals in the form. You may only copy goals from the Goal Plan.



Hi, !

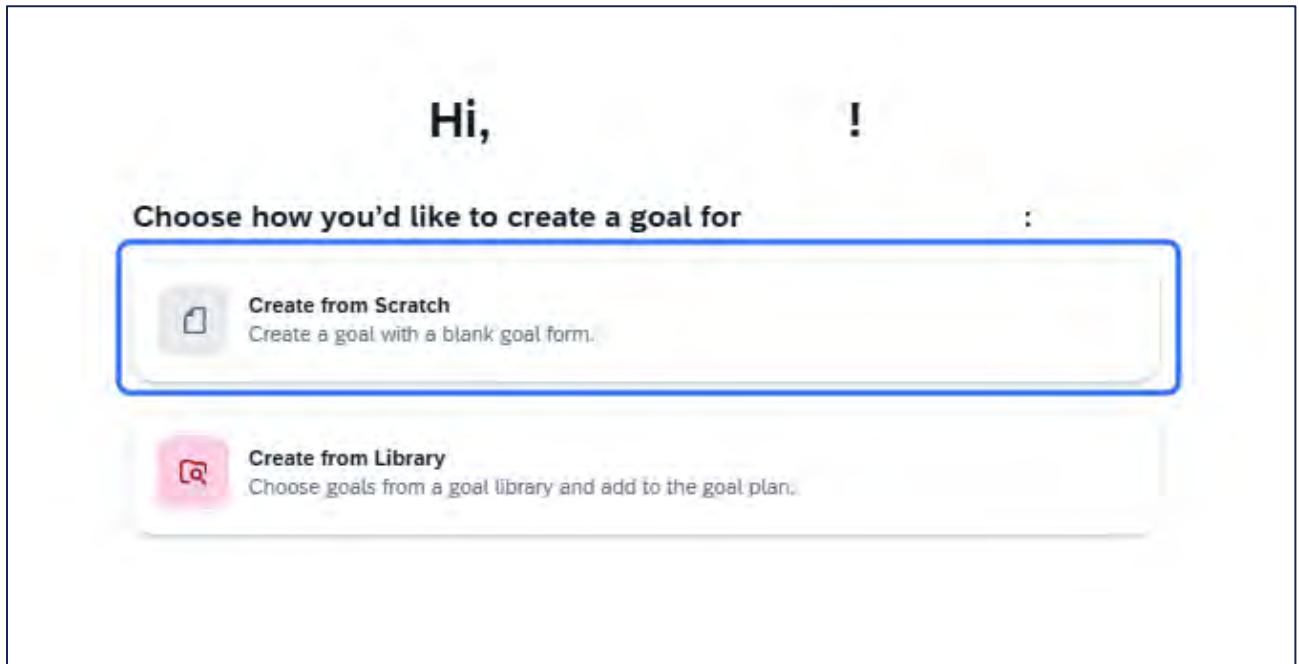
Choose how you'd like to create a goal for :

 **Create from Scratch**  
Create a goal with a blank goal form.

 **Create from Library**  
Choose goals from a goal library and add to the goal plan.

## HOW TO CREATE A GOAL FROM SCRATCH

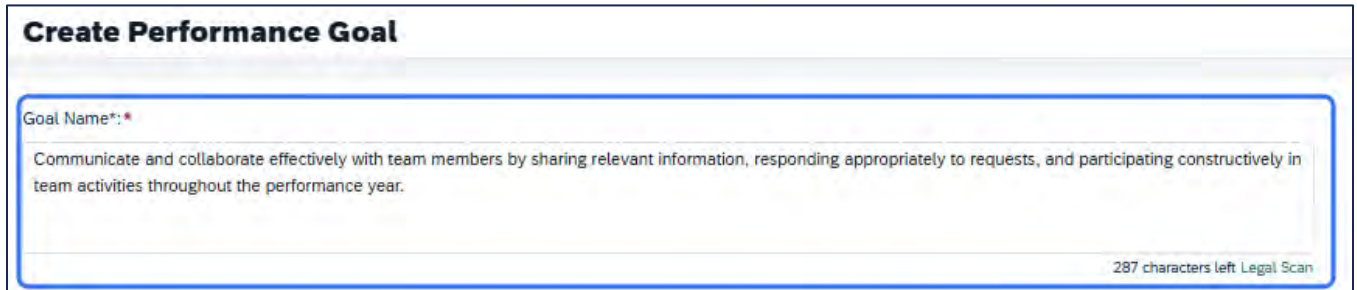
### 1. Select **Create from Scratch**.



The screenshot shows a user interface for creating a goal. At the top, it says "Hi, [Name]!". Below this, a heading reads "Choose how you'd like to create a goal for [Name]:". There are two main options presented in rounded rectangular boxes. The first option, "Create from Scratch", is highlighted with a blue border and includes a document icon and the subtext "Create a goal with a blank goal form." The second option, "Create from Library", includes a magnifying glass icon and the subtext "Choose goals from a goal library and add to the goal plan."

### 2. Type in the **Goal Name**. This is the actual goal, preferably written as a **SMART goal**.

NOTE: You can run a **Legal Scan** of the goal to ensure the language is appropriate.



The screenshot shows a form titled "Create Performance Goal". It features a text input field labeled "Goal Name\*: \*". Inside the field, the following text is entered: "Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year." At the bottom right of the form, a status bar indicates "287 characters left Legal Scan".

3. Type the **metric** for how this goal will be measured. This is the criterion used to determine if the goal has been successfully reached.

NOTE: You can run a **Legal Scan** of the metric to ensure the language is appropriate.

### Create Performance Goal

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

How will it be measured?: \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left Legal Scan

4. Change the **Start Date** and/or **Due Date**, if necessary.

### Create Performance Goal

Goal Name\*: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left Legal Scan

How will it be measured?: \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left Legal Scan

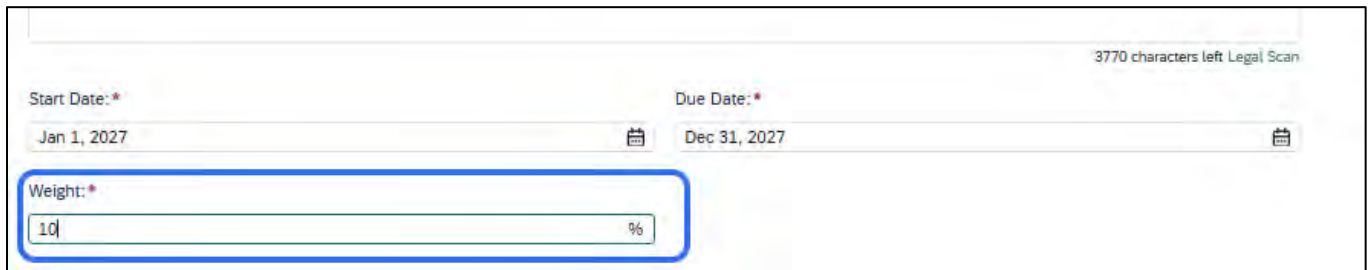
Start Date: \*

Jan 1, 2021

Due Date: \*

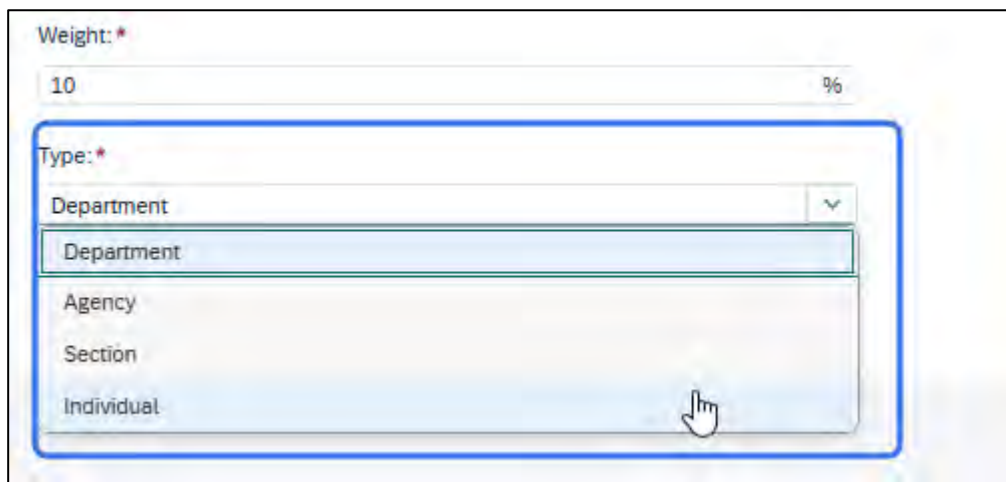
Dec 31, 2027

5. Add the **Weight** of the individual goal. **The total weight of all goals must equal 100%.**



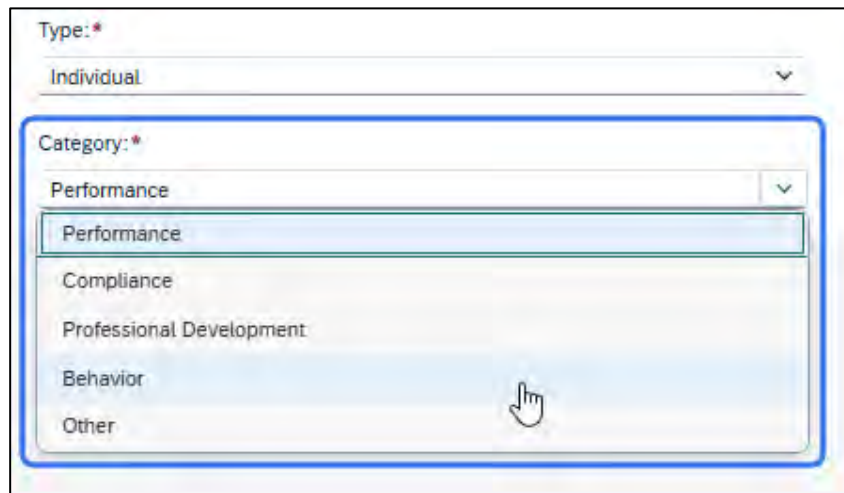
A screenshot of a web form for creating a goal. At the top right, it says "3770 characters left Legal Scan". Below this are two date pickers: "Start Date: \*" with the value "Jan 1, 2027" and "Due Date: \*" with the value "Dec 31, 2027". Below the dates is a "Weight: \*" field with a blue border, containing the value "10" and a percentage sign "%".

6. Select the **Type** of goal.



A screenshot of a web form for creating a goal. The "Weight: \*" field is at the top with the value "10" and a percentage sign "%". Below it is a "Type: \*" dropdown menu that is open, showing four options: "Department", "Agency", "Section", and "Individual". A mouse cursor is pointing at the "Individual" option.

7. Select the goal **Category**.



A screenshot of a web form for creating a goal. The "Type: \*" dropdown menu is at the top with the value "Individual". Below it is a "Category: \*" dropdown menu that is open, showing five options: "Performance", "Compliance", "Professional Development", "Behavior", and "Other". A mouse cursor is pointing at the "Other" option.

8. After you have completed all of the fields, select **Save** at the bottom right of the screen.

**Create Performance Goal**

Goal Name: \*

Communicate and collaborate effectively with team members by sharing relevant information, responding appropriately to requests, and participating constructively in team activities throughout the performance year.

287 characters left. Legal Scan

How will it be measured? \*

The supervisor will document relevant examples of communication and collaboration observed during meetings, projects, and routine work. Examples and any needed feedback will be discussed with the employee during regular check-ins.

3770 characters left. Legal Scan

Start Date: \*

Jan 1, 2027

Due Date: \*

Dec 31, 2027

Weight: \*

10

Type: \*

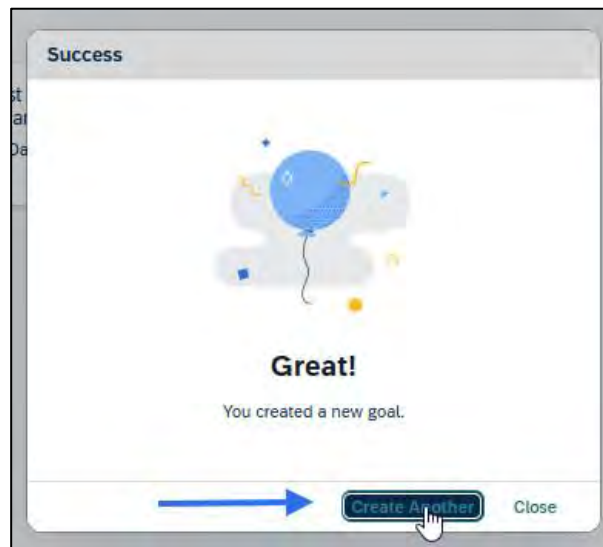
Individual

Category: \*

Behavior

Save Cancel

9. A confirmation message pops up to confirm the creation of the goal. Select **Create Another** to return to the goal creation options screen.

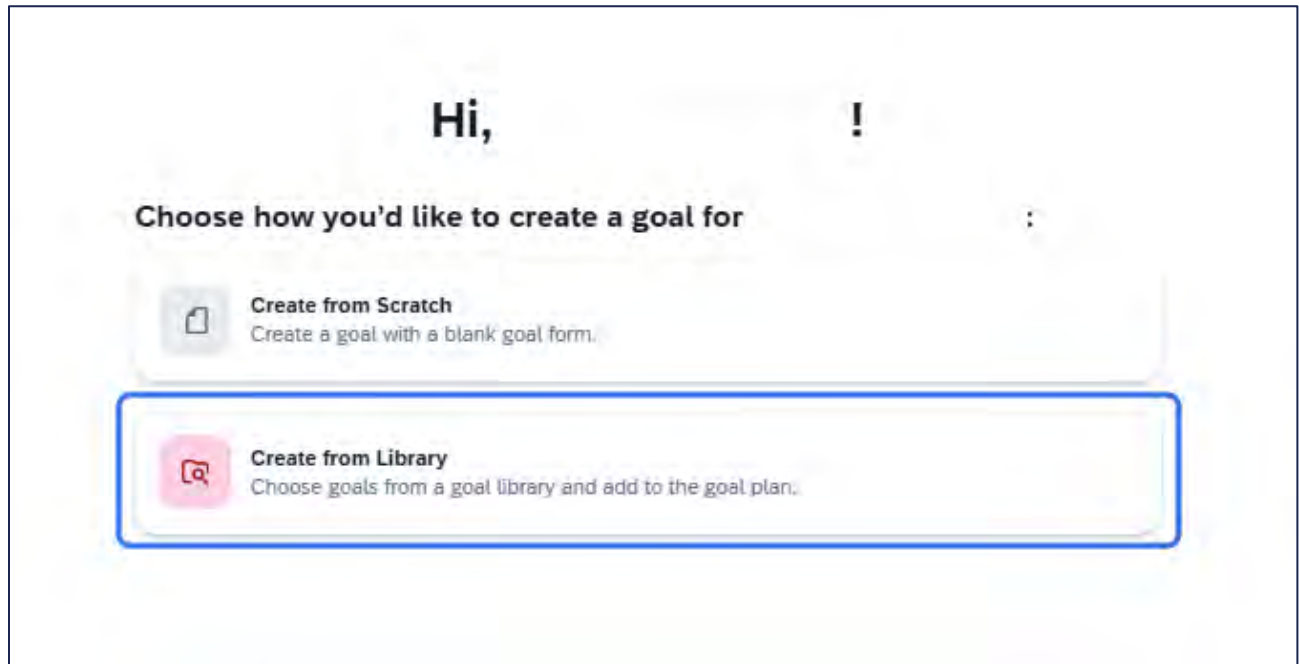


10. The goal has been added to the form. Select the pencil icon if you need to edit an existing goal.

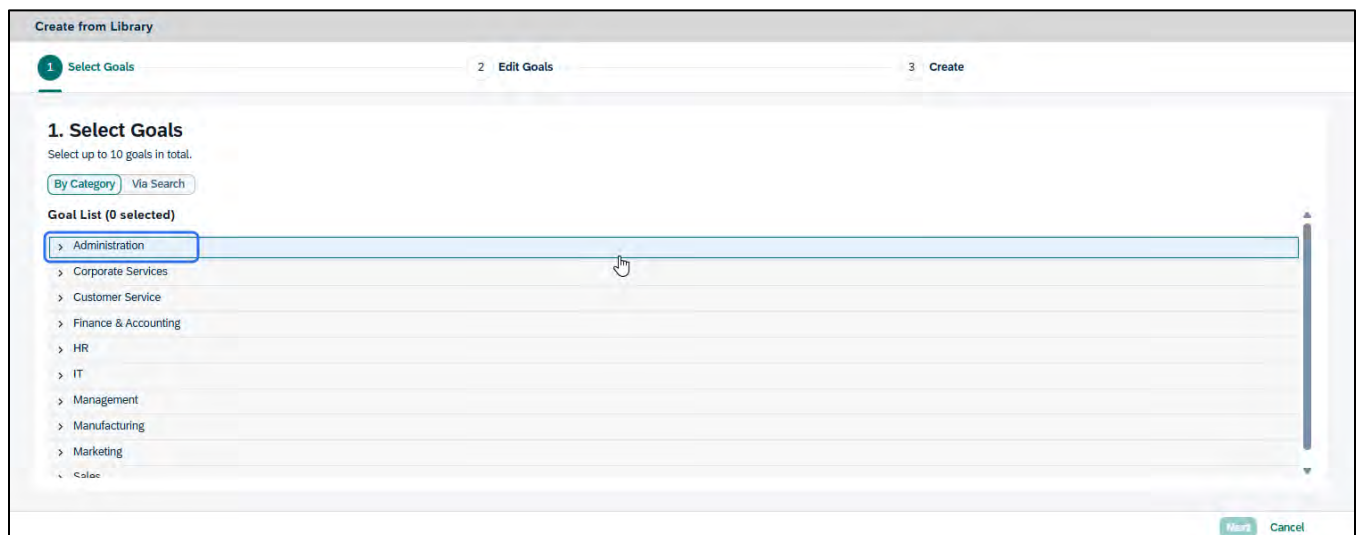
**NOTE:** Once you send this form to your 2nd Level Evaluator, the state of the goal plan changes to **Approved**, and you cannot add, edit, or delete goals.

## HOW TO CREATE GOALS FROM THE LIBRARY

### 1. Select **Create from Library**.



### 2. Option 1: You can browse goals **By Category**. Select the > next to the appropriate category.



3. Select the > next to the appropriate sub-category.

**Create from Library**

1 Select Goals 2 Edit Goals 3 Create

**1. Select Goals**  
Select up to 10 goals in total.

[By Category](#) [Via Search](#)

**Goal List (0 selected)**

- Administration
  - Administrative Support
  - Facilities & Maintenance
  - Office Management**
  - Corporate Services
  - Customer Service
  - Finance & Accounting
  - HR
  - IT
  - Maintenance

[Next](#) [Cancel](#)

4. Select the **box next to the goal** you would like to add. Then, select **Next**.

NOTE: You may add up to 10 goals at once from the library.

**Create from Library**

1 Select Goals 2 Edit Goals 3 Create

**1. Select Goals**  
Select up to 10 goals in total.

[By Category](#) [Via Search](#)

Administration

- Administrative Support
- Facilities & Maintenance
  - ☐ Achieve an average customer satisfaction rating of at least \_\_\_ for work provided by department.
  - ☐ Conduct (timeframe) facility inspections
  - ☒ Conduct \_\_\_(s) of fire drills by (date)
  - ☐ Conduct preventative maintenance on all machines every (time period)
  - ☐ Implement a facility emergency plan by (date)
  - ☐ Increase number of work orders responded to within 24 hours by (date)

[Next](#) [Cancel](#)

5. You must edit the goal. Select the **pencil icon**.

**Create from Library**

1 Select Goals 2 Edit Goals 3 Create

**2. Edit Goals**  
Make changes to the selected goals as needed or instructed.

Conduct \_\_\_(s) of fire drills by (date)

[Pencil icon](#)

6. Most library goals have blanks or details in the Goal Name that need to be edited, so revise as necessary.

Create from Library

1 Select Goals

2 Edit Goals

## 2. Edit Goals

Make changes to the selected goals as needed or instructed.

< Back

Goal Name\*: \*

Conduct (#) of fire drills by (date)

462 characters left Legal Scan

7. Edit the **metric** for how this goal will be measured. This is the criterion used to determine if the goal has been successfully reached.

Create from Library

1 Select Goals

2 Edit Goals

## 2. Edit Goals

Make changes to the selected goals as needed or instructed.

< Back

Goal Name\*: \*

Conduct 1 of fire drills each quarter

463 characters left Legal Scan

How will it be measured?: \*

The employee will track the dates, times, and results of each fire drill and provide a report within 2 weeks of the drill.

3877 characters left Legal Scan

8. Change the **Start Date** and/or **Due Date**, if necessary.

How will it be measured?:\*

The employee will track the dates, times, and results of each fire drill and provide a report within 2 weeks of the drill. The supervisor will review the report and address any issues.

3816 characters left Legal Scan

Start Date: \* Jan 1, 2026 Due Date: \* Dec 31, 2027

9. Add the **Weight** of the individual goal. **The total weight of all goals must equal 100%.**

Start Date: \* Jan 1, 2027 Due Date: \* Dec 31, 2027

Weight: \* 0 %

This field is required.

10. Select the **Type** of goal.

Weight: \* 10 %

Type: \*

Department

Department

Agency

Section

Individual

11. Select the goal **Category**. Then, select **Next** at the bottom right of the window.

Type: \* Individual

Category: \*

Performance

Performance

Compliance

Professional Development

Behavior

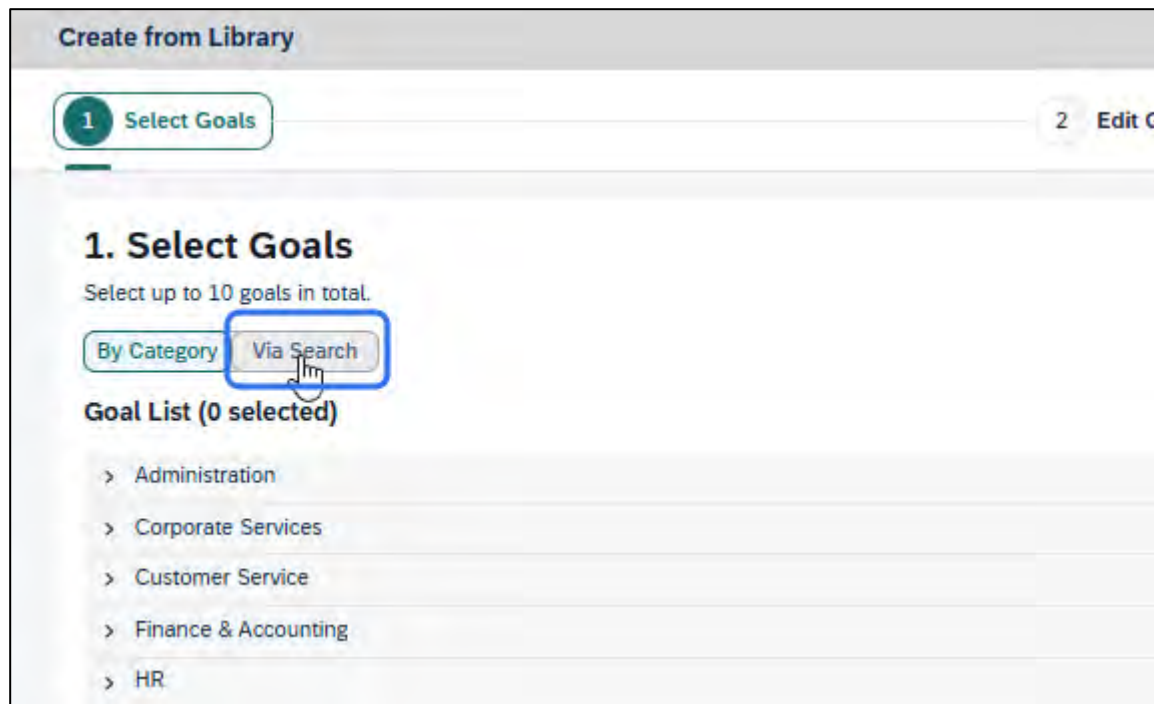
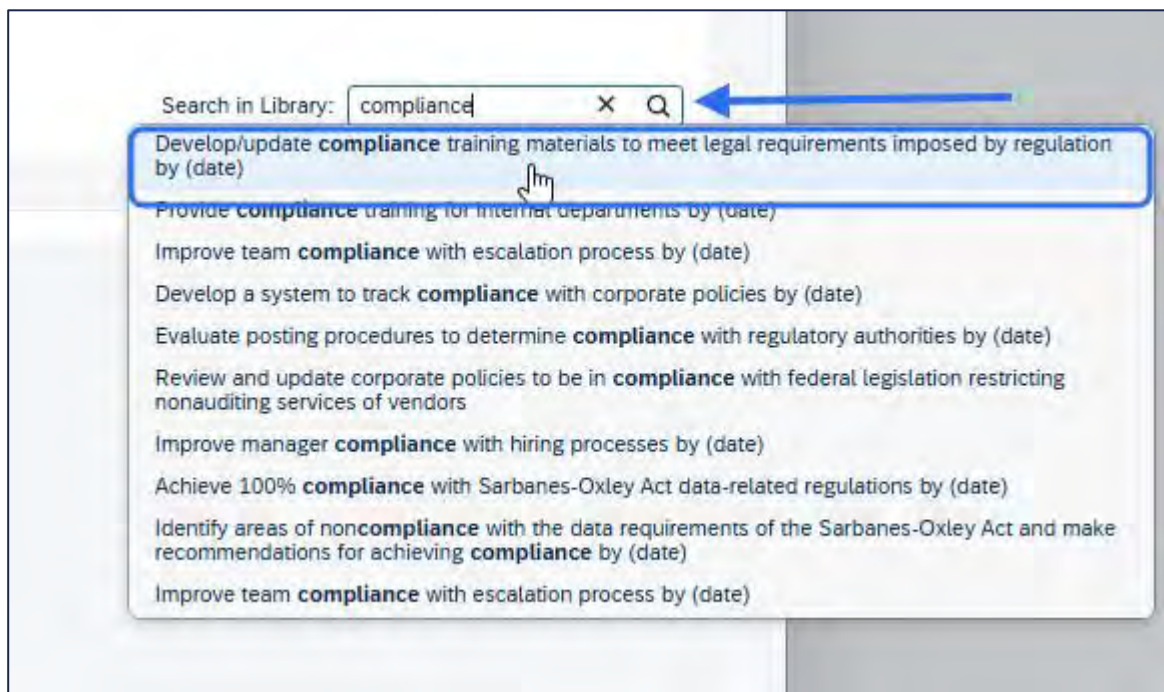
Other

12. Select **Next** again.

The screenshot shows the 'Create from Library' form at Step 2, 'Edit Goals'. The progress bar at the top indicates Step 1 'Select Goals' is completed, Step 2 'Edit Goals' is the current step, and Step 3 'Create' is next. The main content area is titled '2. Edit Goals' with the instruction 'Make changes to the selected goals as needed or instructed.' Below this, there is a text input field containing 'Conduct 1 of fire drills each quarter'. At the bottom right, there are three buttons: 'Previous', 'Next', and 'Cancel'. A blue arrow points to the 'Next' button, which is highlighted with a blue border.

13. Select **Save**. The goal is added to the Goal Plan and the Planning form.

The screenshot shows the 'Create from Library' form at Step 3, 'Create'. The progress bar at the top indicates Step 1 'Select Goals' is completed, Step 2 'Edit Goals' is completed, and Step 3 'Create' is the current step. The main content area is titled '3. Create' with the instruction 'Preview and create goals.' Below this, there is a section titled 'Goals (1 Selected)' with a text input field containing 'Conduct 1 of fire drills each quarter'. At the bottom right, there are three buttons: 'Previous', 'Save', and 'Cancel'. A blue arrow points to the 'Save' button, which is highlighted with a blue border.

14. Option 2: Browse goals using **Via Search**.15. Type in your search term. A list of goals with your search term will appear. Select the **goal you would like** to add.

## 16. Select **Next**.

The screenshot shows a 'Create from Library' dialog box with a progress bar at the top indicating three steps: 1. Select Goals (active), 2. Edit Goals, and 3. Create. Below the progress bar, the title '1. Select Goals' is followed by the instruction 'Select up to 10 goals in total.' There are two buttons: 'By Category' and 'Via Search'. The 'Search Results (1 selected)' section shows a single goal: 'Develop/update compliance training materials to meet legal requirements imposed by regulation by (date)'. A search bar at the top right contains the text 'Develop/update comp' and a magnifying glass icon. At the bottom right, there is a blue 'Next' button with a white arrow pointing to it, and a 'Cancel' button.

## 17. Repeat steps 6 - 13 to edit and add the goal to the Goal Plan and the Planning form.

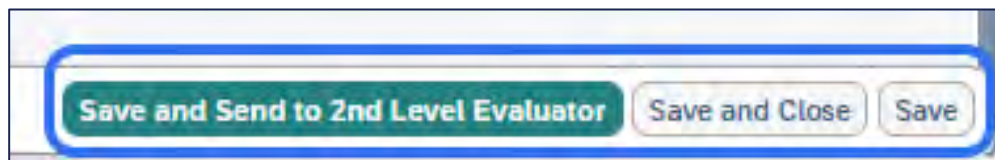
## MOVING THE FORM TO THE 2<sup>ND</sup> LEVEL EVALUATOR

The **2nd Level Evaluator reviews and approves the Performance Planning Form, including the employee's goals.** If the 2nd Level Evaluator does not approve the goals or other information on the form, the form will be returned to the supervisor for revision.

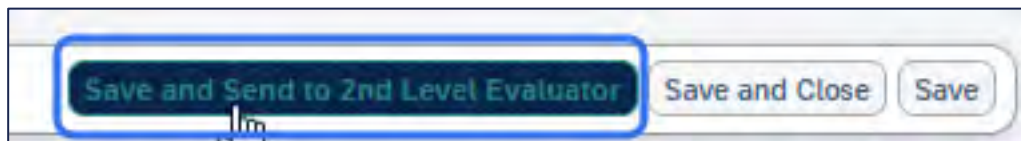
SuccessFactors does not provide a way for the 2nd Level Evaluator to identify or explain the changes needed when returning the form. The 2nd Level Evaluator should communicate the requested changes by email or through a discussion with the supervisor. If the form is returned without an explanation, the supervisor should contact the 2nd Level Evaluator for clarification before making revisions.

1. After you have finished adding goals, you have 3 options: 1. You can **Save and Send to 2nd Level Evaluator** if the form is completed; 2. You can **Save and Close** the form, if you are not finished with it; OR 3. You can **Save** the form and continue working on it.

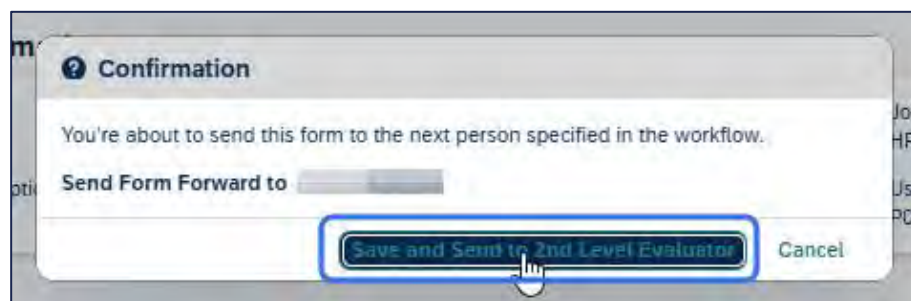
NOTE: Once you send the form to the 2nd Level Evaluator, the Goal Plan is **APPROVED**. Goals cannot be added, edited, or deleted.



2. When the form is complete, select **Save and Send to 2nd Level Evaluator**. You will not be able to review or edit the form or the Goal Plan after you send it to the 2<sup>nd</sup> Level Evaluator.



3. A confirmation screen opens. You must select **Save and Send to 2nd Level Evaluator** again for the form to move to the next step in the Route Map. Select **Cancel** if you are not ready to send the form for approval.



- After you have sent the form to the 2nd Level Evaluator, it can be viewed in your Performance Inbox in the **En Route** folder.

The screenshot shows the SAP SuccessFactors Performance interface. On the left, the 'My Forms' sidebar has 'En Route' selected. The main area shows filters for 'En Route' forms. Below the filters, a table titled 'Forms (1)' displays the following data:

| Title                         | Employee | Current Step                    |
|-------------------------------|----------|---------------------------------|
| 2026 Performance Planning for |          | Initial Planning: 2nd Level ... |

## MEETING WITH YOUR 2<sup>ND</sup> LEVEL EVALUATOR

The 2nd Level Evaluator may meet with supervisors to review employee goals and Performance Planning Forms before approval. Supervisors should be prepared to explain the performance expectations they established and the decisions made during the planning process.

To prepare for the meeting:

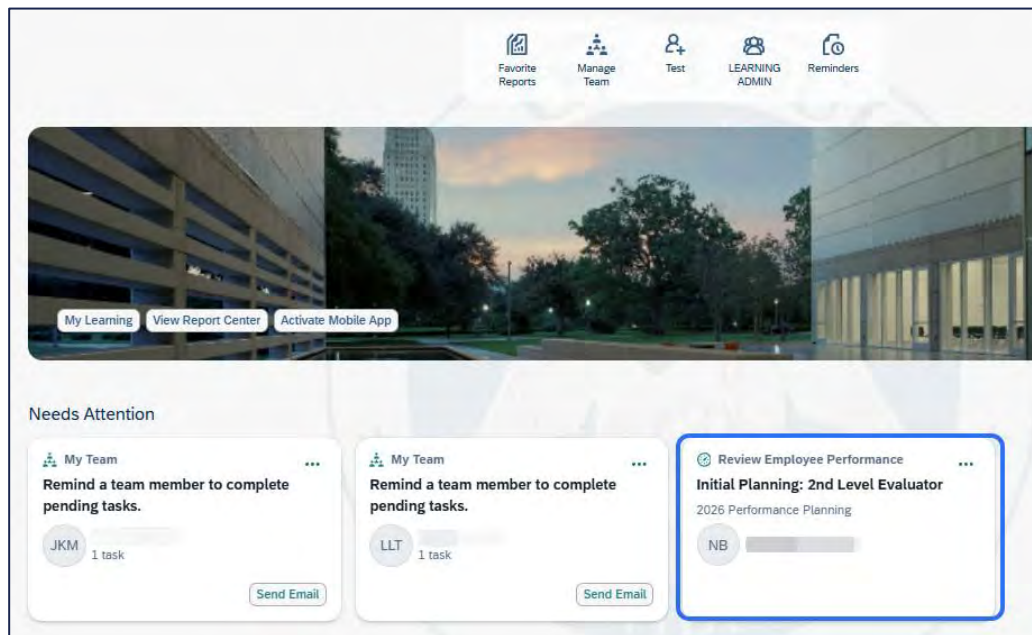
- **Follow agency timelines and procedures.** Agencies may establish deadlines or additional requirements for completing Performance Planning. Supervisors who are unsure of their agency's requirements should contact their HR Office.
  - **Review the goals before the meeting.** Be prepared to explain why each goal was selected, what successful performance looks like, and how progress will be measured.
  - **Have supporting information available.** This may include the employee's Performance Planning Form or Goal Plan, position description, relevant agency or work unit goals and priorities, and documentation that supports any corrective performance or behavior expectations.
  - **Be prepared to explain goal weights.** Supervisors should be able to explain how the weights reflect the importance, impact, time commitment, or responsibilities associated with the employee's goals.
  - **Be prepared to discuss revisions.** If the 2nd Level Evaluator does not approve a goal or another part of the plan, clarify the requested changes before revising the form.
-

## PLANNING - 2<sup>ND</sup> LEVEL EVALUATOR'S ROLE

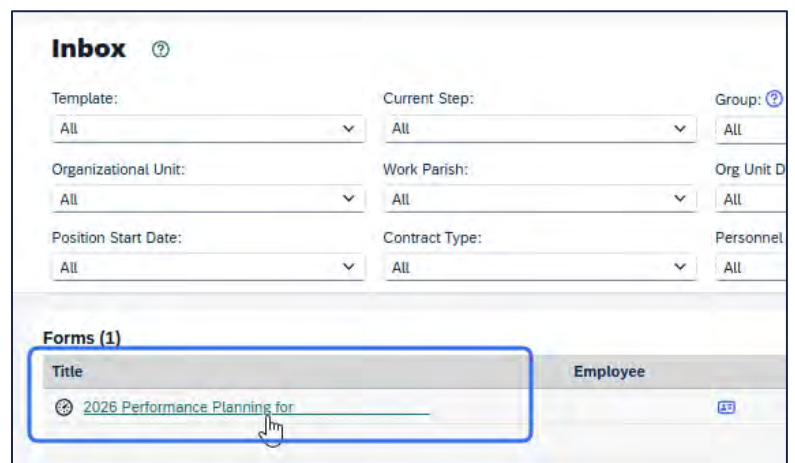
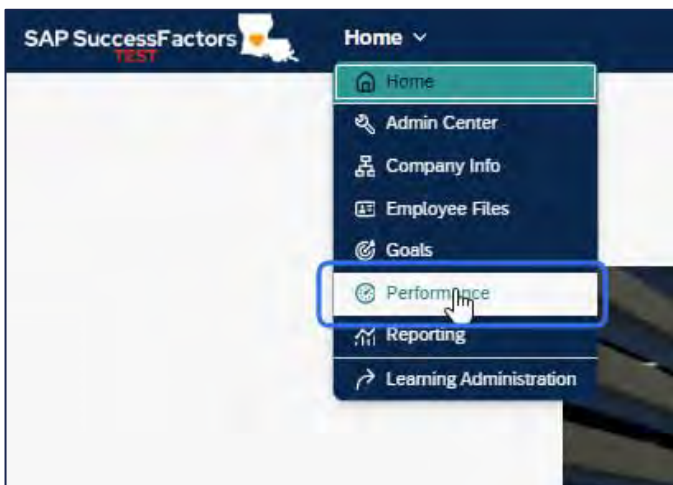
Rule 10.4 of the State Civil Service Rules outlines the responsibilities of the 2nd Level Evaluator in the CPM process. The 2nd Level Evaluator must concur with and approve the performance planning form and the performance evaluation form prepared by the Evaluating Supervisor.

### 2<sup>ND</sup> LEVEL EVALUATOR – REVIEWING THE PERFORMANCE PLANNING FORM

1. When you have a form to review, it will appear on your dashboard in the **Needs Attention** section. Select the box to open the form.



2. Another navigation option would be to use the **Home** menu and select **Performance**. The form will appear in your **In Progress - Inbox**, which is the initial screen in this section. Select the form to open it.



- Review the Goals created for the employee. Select **each goal** or the > to the right of the goal to see all of the goal details. Select the X at the top right to close the side panel.

When reviewing goals, consider these questions as well:

- Do the goals reflect the employee's actual work and responsibilities?
- Do the goals align with the employee's position description and relevant organizational priorities?
- Are the goals Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART)?
- Is it clear what the employee is expected to accomplish or how the employee is expected to perform?
- Does each metric clearly explain how progress and successful performance will be measured?
- Is the information needed to measure the goal reasonable to collect and review throughout the year?
- Are the goals achievable for this employee when considering workload, skills and experience, available resources, and support?
- Do the goal weights appropriately reflect the importance, impact, time commitment, or responsibilities associated with the goals, and do the weights total 100%?
- Are expectations reasonably consistent for employees performing similar work?

**2026 Performance Planning for**

Route Map: Current Step: Initial Planning: 2nd Level Evaluator | Due Date: 03/01/2026 | Next Step: Planning Discussion

**Employee Information**

|                             |                                      |                          |                      |
|-----------------------------|--------------------------------------|--------------------------|----------------------|
| First Name:                 | Last Name:                           | Job Title:               | Job Code:            |
|                             |                                      | HR CONSULTANT SPECIALIST | 00170870             |
| Personnel Area Description: | Org Unit Description:                | User Number:             | Position Start Date: |
| CS-State Civil Service      | SCS-LEARNING, PERFORMANCE, & CULTURE | P00323795                | 09/24/2018           |

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2026 - 12/31/2026 | 03/02/2026 |

**Goals**

| Goal                                                                                                 | Weight |
|------------------------------------------------------------------------------------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026   | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |

**Assist with evolving department needs by effectively managing additional tasks and responsibilities.**

How will it be measured?  
Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

**More info on the Goal**

|                            |                           |
|----------------------------|---------------------------|
| Start Date:<br>Jan 1, 2026 | Due Date:<br>Dec 31, 2026 |
| Weight:<br>20%             |                           |

Save and Send to Planning Discussion | Save and Close | Save | Send Back to Evaluating Supervisor | Save

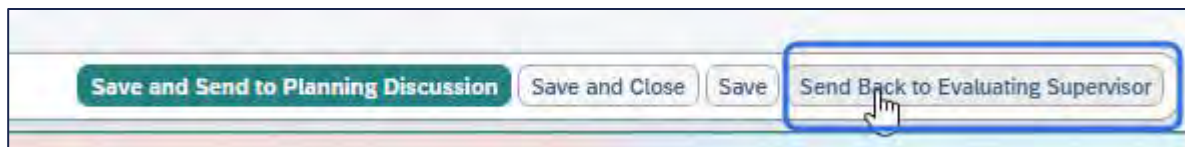
---

## 2<sup>ND</sup> LEVEL EVALUATOR – PLANNING NOT APPROVED

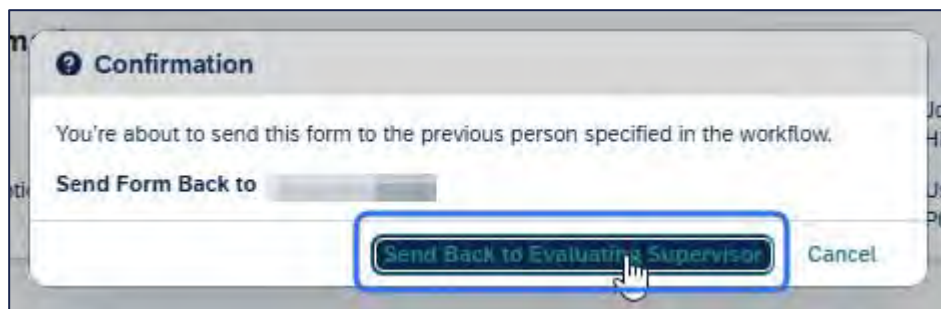
If you do not agree with the goals created, you may send this form back to the evaluating supervisor for revision.

The system does not allow you to explain why you are not approving the form; therefore, you will need to reach out to the evaluating supervisor to discuss your required revisions.

1. If you do NOT approve the form, select **Save and Send to Evaluating Supervisor**.



2. The next screen asks you to confirm your selection. You must select **Send Back to Evaluating Supervisor** again for the form to be returned.

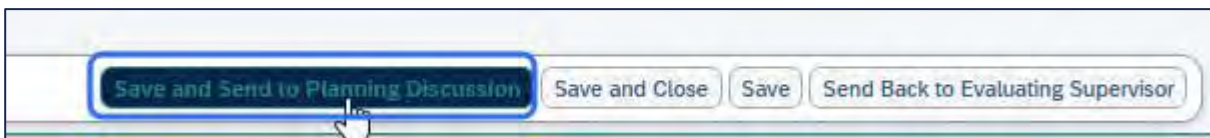


## 2<sup>ND</sup> LEVEL EVALUATOR – PLANNING APPROVED

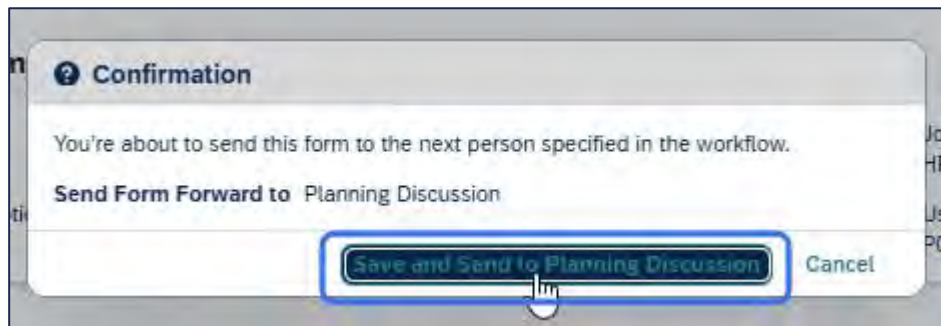
Once the 2nd Level Evaluator has completed the review and is satisfied with the Performance Planning Form, the form may be approved and moved forward in the process.

Because this is a **Collaborative Step**, approval sends the form to the **supervisor and employee at the same time**. Before approving the form, the 2nd Level Evaluator should make sure the goals and other planning information are complete, accurate, and ready to be shared with the employee.

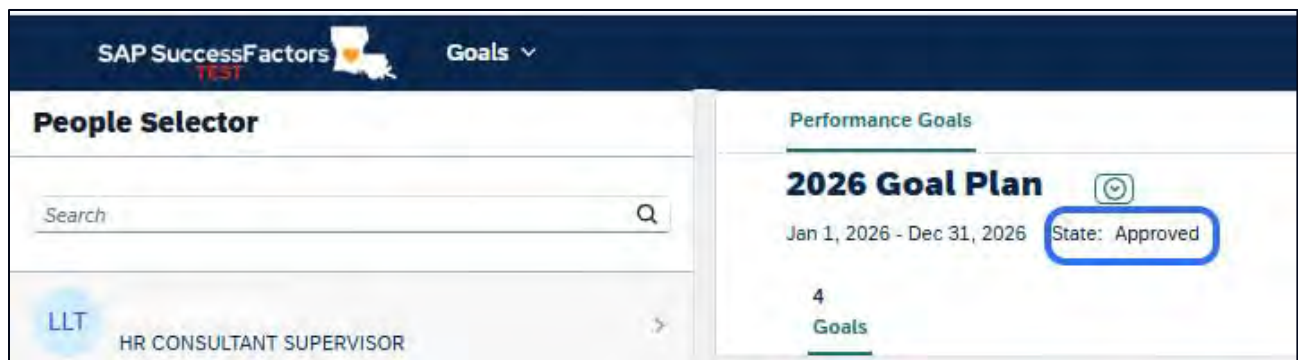
1. If you approve of the planning, select **Save and Send to Planning Discussion**.



2. A confirmation screen opens. You must select **Save and Send to Planning Discussion** again for the form to move to the next step.



3. When the 2<sup>nd</sup> Level Evaluator approves the performance management planning form, multiple actions occur:
  - The Goal Plan State changes to **APPROVED**. Goals cannot be added, edited, or deleted.
  - The form is sent to the supervisor and the employee simultaneously.



## CONDUCTING THE PLANNING DISCUSSION

**WHAT:** The Planning Discussion is the supervisor's opportunity to review the employee's approved goals and establish a shared understanding of performance expectations for the year. During the discussion, supervisors should explain the intent of each goal, discuss how success will be measured, connect the employee's work to agency priorities, and talk about any resources, support, or development needs that may affect success. Employees should also have an opportunity to ask questions, share concerns, and discuss how they plan to approach their goals.

**WHEN:** Once the 2nd Level Evaluator approves the Performance Planning Form, the form is available to both the supervisor and employee. The supervisor should schedule the Planning Discussion promptly. Annual Planning Discussions must be completed no later than March 1. For employees appointed outside the annual planning period, the Planning Discussion should be completed within the required planning timeframe for the appointment.

**WHY:** The Planning Discussion makes sure the supervisor and employee begin the performance year with the same understanding of what is expected and what successful performance looks like. It also establishes how progress will be monitored, what support may be needed, and how the supervisor and employee will work together throughout the year. The discussion is the beginning of the continuous performance management process—not the only conversation about performance.

---

## SUPERVISOR PLANNING DISCUSSION PREPARATION CHECKLIST

### BEFORE THE DISCUSSION

1. **Review the Performance Planning Form.** Review each goal, metric, and weight so you are prepared to explain what is expected and how successful performance will be measured.
2. **Consider the Employee's Role and Contributions.** Be prepared to explain how the employee's work supports the work unit, agency priorities, and mission.
3. **Identify Potential Challenges and Support.** Consider any resources, tools, training, coaching, or other support the employee may need to successfully meet expectations.
4. **Prepare for Employee Participation.** Encourage the employee to review the approved goals before the meeting and come prepared with questions, concerns, or ideas about how they will approach the work.

### DURING THE DISCUSSION

1. **Set a Positive, Collaborative Tone.** Make the discussion a two-way conversation and encourage the employee to participate throughout the meeting.
2. **Review Each Goal.** Explain the purpose of the goal, the performance expectation, and how success will be measured.
3. **Invite the Employee's Perspective.** Ask about potential challenges, needed resources or support, and how the employee plans to approach the goal.

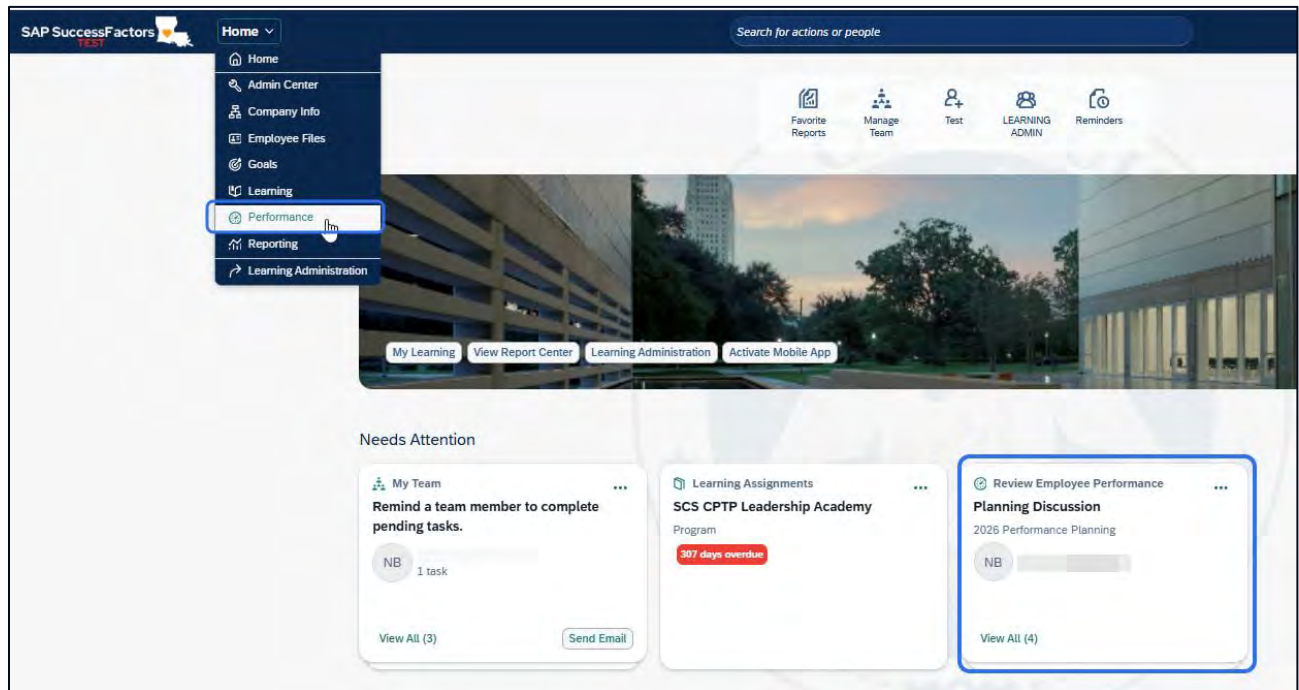
4. **Connect the Work to the Agency Mission.** Help the employee understand how their responsibilities and goals contribute to the work of the team and agency.
5. **Check for Understanding.** Make sure the employee understands the expectations and what successful performance looks like.
6. **Discuss Development and Support.** Talk about any skills, knowledge, resources, training, or coaching that may help the employee succeed or grow.
7. **Agree on Next Steps.** Discuss responsibilities, upcoming milestones, and how often the supervisor and employee will meet to review progress and performance.

#### AFTER THE DISCUSSION

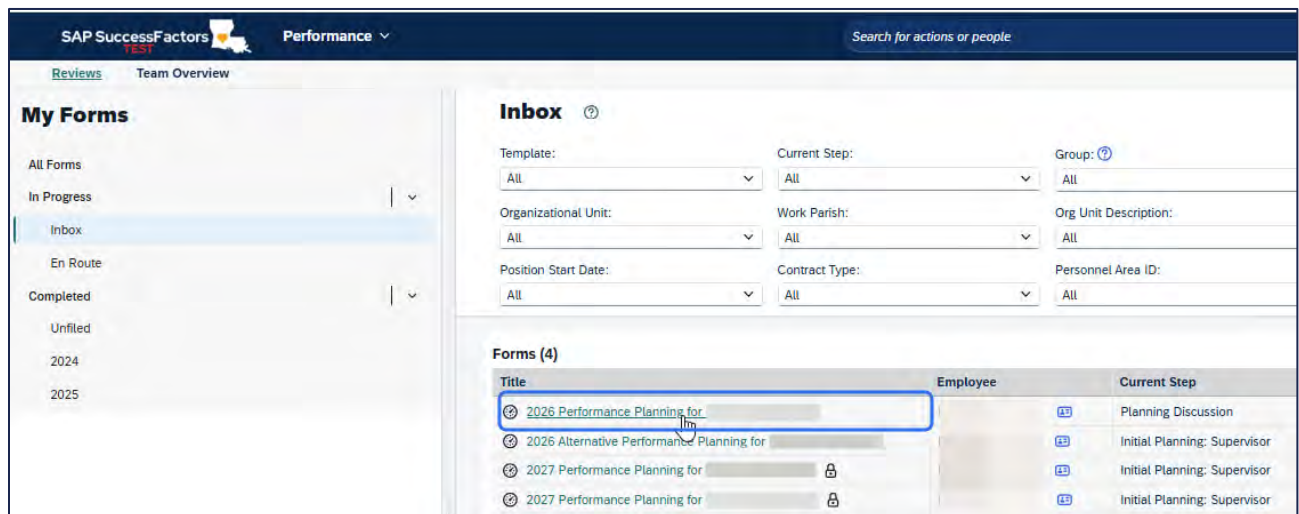
1. **Document Important Discussion Points.** Record significant questions, commitments, support needs, or follow-up actions discussed during the meeting.
2. **Provide Agreed-Upon Support.** Follow through on any resources, training, tools, or assistance identified during the discussion.
3. **Schedule Regular Performance Discussions.** Establish consistent check-ins to review progress, supporting documentation, performance, and any needed adjustments in support or expectations.
4. **Continue Monitoring Performance.** Use the goals and metrics throughout the year to provide timely feedback, recognize successful performance, and address concerns as they arise.

## SUPERVISOR - DOCUMENTING THE PLANNING DISCUSSION

1. Navigate to your **In Progress – Inbox** by selecting **Performance** in the **Home** menu. You may also jump directly to the form by selecting the correct card in the **Needs Attention** section of your dashboard.



2. Select the **link** for the correct form to open it.



3. Select **Planning Discussion** in the left sidebar or scroll down to the **Planning Discussion** section of the form. You must complete this section of the Performance Planning Form.

**2026 Performance Planning for** History

NB HR CONSULTANT SPECIALIST

**Route Map**

- Introduction
- Employee Information
- Review Dates
- Planning Discussion**
- Goals

**Route Map**

Current Step: Planning Discussion Due Date: 03/01/2026 Next Step: Employee Signature

**Introduction**

Description

**Employee Information**

|                             |                                      |              |                      |
|-----------------------------|--------------------------------------|--------------|----------------------|
| First Name:                 | Last Name:                           | Job Title:   | Job Code:            |
| Personnel Area Description: | Org Unit Description:                | User Number: | Position Start Date: |
| CS-State Civil Service      | SCS-LEARNING, PERFORMANCE, & CULTURE | P00323795    | 09/24/2018           |

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2026 - 12/31/2026 | 03/01/2026 |

**Planning Discussion**

Date of Planning Discussion \*  
e.g. 2026-12-31

Results of Planning Discussion \*

Supervisor's Signature \*

4. Select the **Date of Planning Discussion**.

NOTE: The system will indicate the date you select for the Planning Discussion. Your employee will be notified what date is selected. Backdating or advance dating may result in an audit finding.

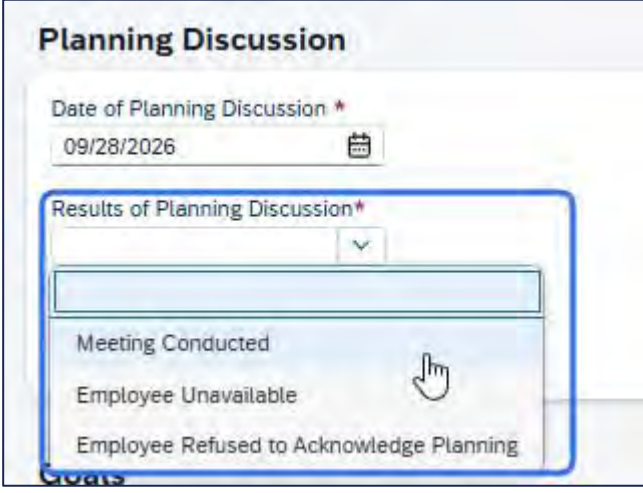
**Planning Discussion**

Date of Planning Discussion \*  
e.g. 2026-12-31

Results of Planning Discussion \*

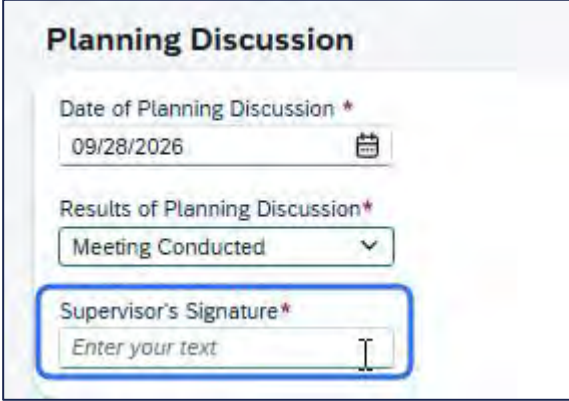
Supervisor's Signature \*  
Enter your text

5. Select the **Results of Planning Discussion**. You have 3 options to choose from:
- Select **Meeting Conducted** when you have met with your employee and discussed their goals.
  - If your employee is on FMLA or other extended leave, you may need to select **Employee Unavailable**. Before making this selection, please consult with your HR to ensure you are complying with State Civil Service rules.
  - Your third option is **Employee Refused to Acknowledge Planning**. Use this when you have met with your employee and the employee says they will not sign the planning form.



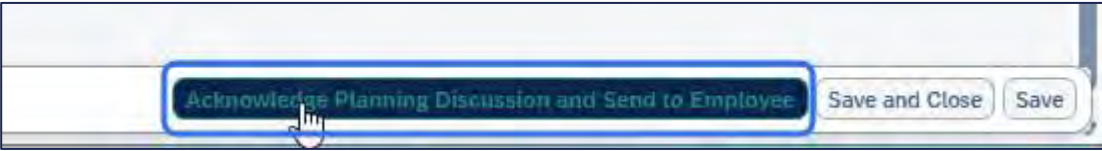
The screenshot shows the 'Planning Discussion' form. The 'Date of Planning Discussion' is set to 09/28/2026. The 'Results of Planning Discussion' dropdown menu is open, showing three options: 'Meeting Conducted', 'Employee Unavailable', and 'Employee Refused to Acknowledge Planning'. A hand cursor is pointing at the 'Meeting Conducted' option.

6. Type your name in the **Supervisor's Signature** field.



The screenshot shows the 'Planning Discussion' form. The 'Date of Planning Discussion' is set to 09/28/2026. The 'Results of Planning Discussion' dropdown menu is set to 'Meeting Conducted'. The 'Supervisor's Signature' field is highlighted with a blue box, and a hand cursor is pointing at the text input area.

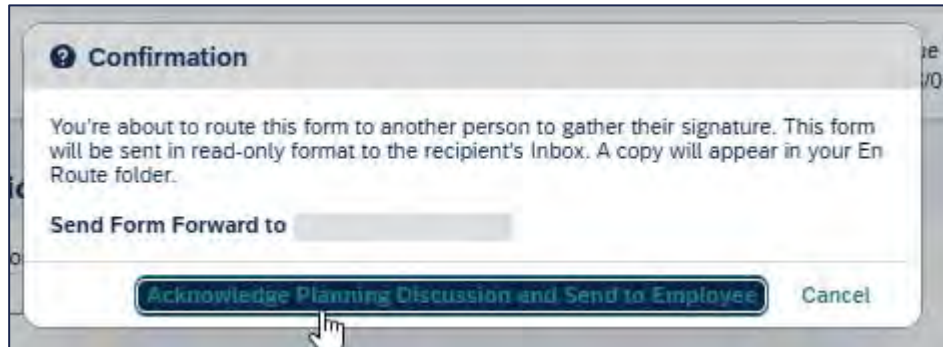
7. After the Planning Discussion is completed and documented, scroll to the bottom of the form, and select **Acknowledge Planning Discussion and Send to Employee**.



The screenshot shows the bottom of the 'Planning Discussion' form. The 'Acknowledge Planning Discussion and Send to Employee' button is highlighted with a blue box, and a hand cursor is pointing at it. To the right of this button are two other buttons: 'Save and Close' and 'Save'.

8. A confirmation screen opens. You must select **Acknowledge Planning Discussion and Send to Employee** again for the form to move to the employee to sign.

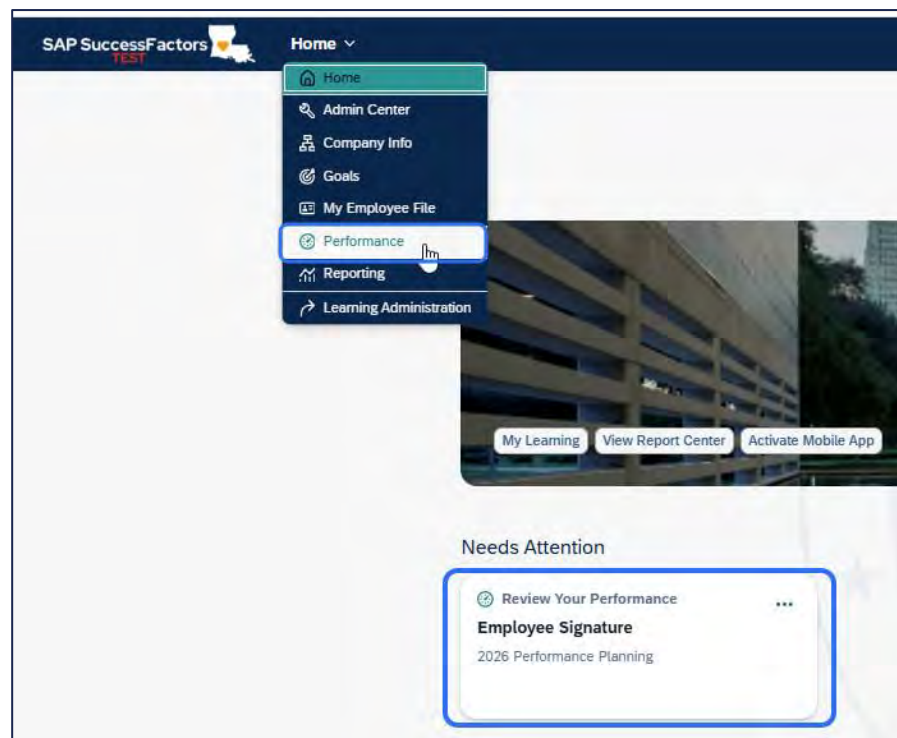
NOTE: A copy of the form will appear in your **En Route** folder. Once the employee has signed the form, a copy of the completed form can be found in the **Completed - Unfiled** folder in **My Forms**.



## EMPLOYEE - SIGNING THE PLANNING FORM

An employee's signature or electronic acknowledgement confirms that the Performance Planning Form was received and discussed. The acknowledgement documents that the employee received the goals, expectations, and measures that will be used to manage performance during the performance year.

1. Select the correct card in the **Needs Attention** section of your dashboard OR select **Performance** in the **Home** menu. Then, select the link to open your form.



2. In the top right corner, you have multiple options:
  - **History** displays the form and additional information including the form originator, review dates, a document list for this employee, etc.
  - Under **Actions**, you have the option to **Legal Scan** the Form or **View Form Information**.
    - A **Legal Scan** checks the form for any questionable or potentially inappropriate language.
    - **View Form Information** provides an **Audit Trail** and **Properties** for the form.
  - You may select **Print & PDF** to either print or save a copy of the form.



3. To review your Goals in detail, select **each goal** or the > to the right of the goal. Select the X at the top right to close the side panel.

The screenshot shows the SAP SuccessFactors Performance Planning interface. The main area displays the 'Route Map' for 'Initial Planning: 2nd Level Evaluator'. The 'Goals' section is expanded, showing a list of goals with weights. The goal 'Assist with evolving department needs by effectively managing additional tasks and responsibilities' is selected, and its details are shown in a side panel on the right. The side panel includes sections for 'How will it be measured?' and 'More Info on the Goal'.

| Goal                                                                                                 | Weight |
|------------------------------------------------------------------------------------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2025.  | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2025.                             | 40%    |
| Complete all mandatory annual training by October 1, 2025.                                           | 10%    |

4. Select **Sign** at the bottom right of the screen.

Note: Failure to sign will not prohibit the planning from becoming official for the performance year.

This close-up shows the bottom right of the interface. The 'Sign' button is highlighted with a blue box, and a mouse cursor is pointing at it. Other buttons visible are 'Save and Close' and 'Save'.

5. A confirmation screen will appear. You must select **Sign** again to complete the process.

This screenshot shows a confirmation dialog box. The message reads: "You're about to submit this form for completion. A copy of the form will be sent to your Completed folder." The 'Sign' button is highlighted with a blue box, and a mouse cursor is pointing at it. The 'Cancel' button is also visible.

## MANAGING PERFORMANCE THROUGHOUT THE YEAR

Performance management does not end with the Planning Discussion. Throughout the performance year, supervisors should regularly meet with employees to discuss progress, provide feedback, address concerns, recognize successful performance, and identify any support needed to help employees meet expectations.

The frequency of these discussions may vary depending on the employee, the work, and the goals, but supervisors should establish a consistent schedule and follow through with planned check-ins.

During regular performance discussions, supervisors should:

- **Review progress goal by goal.** Discuss the employee's progress toward each goal and review the supporting documentation identified in the metric.
- **Discuss current performance.** Talk about how the employee is performing in relation to the goal, metric, and evaluation scale. Explain the assessment using specific supporting documentation rather than waiting until the end of the year to discuss performance.
- **Invite employee reflection.** Give employees an opportunity to discuss their own performance, accomplishments, challenges, and progress. Supervisors may also ask employees how they would currently assess their performance on each goal.
- **Clarify expectations.** Address misunderstandings or differences in how the supervisor and employee understand the performance expectations and make sure both are clear about what successful performance looks like.
- **Identify next steps and support.** Discuss what the employee should continue, improve, or adjust and identify any resources, coaching, training, or other support that may be needed.
- **Follow through.** Complete any actions or provide any support promised during the discussion.

## DOCUMENTATION BEST PRACTICES

Documentation is an important part of continuous performance management. Throughout the performance year, supervisors should maintain **objective, timely records of employee performance** to support feedback, coaching, recognition, and the final evaluation. Documentation should reflect the employee's performance across the year, including both accomplishments and areas of concern.

Employment law professionals use a phrase to show just how important good documentation is to supervisors and managers: "If you didn't write it down, it didn't happen!"

Here are some tips to help you document employee performance:

1. **Use objective language.** Objective language doesn't mention emotions. It does not use opinions. Objective language uses only facts.
2. **When you document, record what you observe using your five senses.** What exactly did you see? What exactly did you hear? In some cases, taste, touch, and smell may be relevant.
3. **Write down direct quotes.** Don't document others' words as your own.
4. **Don't draw conclusions in your documentation.** Let the judge or referee draw the conclusions from your documentation.
5. **Make sure to get all the facts, and stick to the facts.** How do you know if you got all the important facts? Make sure you answer Who? What? Where? When? How? and Why? If you have answers to all of these questions, you've got complete documentation.
6. **Make sure your answers are as specific and detailed as possible.**
7. **Be consistent.** Courts may be suspicious when supervisors have documentation, especially thorough documentation on only one or two of the employees they supervise. In this case, it looks like the supervisor is out to get the employees with the documentation.
8. **Keep documentation on all of your employees,** not just those who do superlative work or have discipline problems.
9. **Be balanced.** Documentation should not be limited to negative events. Be sure to document the extraordinary and positive accomplishments of your employees, too.
10. **Be timely.** Prepare your documentation right after the incident occurs, not later. You won't remember the details of what happened even a few days later. What's worse, courts sometimes discount documentation created long after the event.
11. **Quality is more important than quantity!** If you answered the who, what, when, where, why and how in two or three sentences, that's all that may be needed.

## CONTINUOUS PERFORMANCE EVALUATION

**WHAT:** CPM Evaluation is the process of reviewing and documenting the employee's performance for the performance year. Supervisors evaluate each goal based on the goal and metric established during planning, supporting documentation collected throughout the year, and the applicable evaluation scale.

In SuccessFactors, supervisors assign a rating and provide a written justification for each goal. The system calculates the overall rating based on the individual goal ratings and weights.

Once the supervisor completes the Performance Evaluation Form, it is sent to the 2nd Level Evaluator for review and approval. When the 2nd Level Evaluator approves the form, it is sent simultaneously to the supervisor and employee. The supervisor then conducts the Evaluation Discussion, documents the date and result of the discussion, and sends the form to the employee for acknowledgement.

**WHEN:** Performance Evaluation occurs between January 1 and March 1 each year. Supervisors should prepare for the Evaluation Discussion before sending the form to the 2nd Level Evaluator so the discussion can occur promptly after approval.

**WHY:** Evaluation brings together the expectations established during planning, the feedback and performance discussions that occurred throughout the year, and the supporting documentation collected along the way. Supervisors must evaluate employees based on the goals and metrics as written and on performance across the entire year—not personality, isolated incidents, or only the most recent performance.

Performance ratings also have meaningful consequences for employees. Under State Civil Service rules, an Unsuccessful rating can affect eligibility for a market adjustment, promotion, detail to a higher position, permanent status, and placement on the Department Preferred Re-employment List.

A well-supported evaluation gives employees a clear record of how their performance compared with established expectations and gives supervisors a basis for recognizing accomplishments, addressing performance concerns, and discussing next steps. Because performance should have been discussed throughout the year, the final evaluation should confirm and document the employee's performance—not come as a surprise.

---

## RATING SCALE REVIEW

**SCS Rule 10.6 establishes the 5-point rating scale used to evaluate employee performance.** The scale provides a common standard for determining how well an employee met the expectations of the position. Supervisors should use the scale throughout the performance year—not just at evaluation time—to help guide feedback, performance discussions, and final ratings.

For each goal, supervisors should consider what performance would look like at each level of the scale. **Successful** means the employee met the goal as written. Ratings above or below Successful should reflect clear patterns in performance and should be supported by documentation.

Under SCS Rule 10.6:

- **5 – Exceptional:** Consistently exceeds position requirements.
- **4 – Exceeds Expectations:** Occasionally exceeds position requirements.
- **3 – Successful:** Meets position requirements.
- **2 – Needs Improvement:** Occasionally fails to meet position requirements.
- **1 – Unsuccessful:** Consistently fails to meet position requirements.

The rating should reflect the employee’s overall performance against the goal and metric, including the frequency, consistency, scope, and impact of performance throughout the year. Supervisors should avoid basing ratings on a single event or on effort alone.

---

## EVALUATING YOUR EMPLOYEE'S GOALS

Performance evaluations have a meaningful impact on employees. Ratings become part of the official record of performance and may affect employment opportunities, eligibility for certain personnel actions, and other employment decisions. Because of that impact, supervisors should approach evaluation carefully and make sure ratings are based on established expectations, documented performance, and consistent standards.

### PERFORMANCE EVALUATION GUIDELINES

Before beginning an employee's evaluation, keep the following principles in mind.

**Be objective.** Ratings should reflect the employee's performance, not personality traits, personal opinions, or the quality of the working relationship between the supervisor and employee. Focus on what the employee did and the results of that performance.

**Consider the entire performance year.** Evaluate patterns of performance across the full performance cycle rather than placing too much emphasis on recent events. Both accomplishments and performance concerns from throughout the year should be considered.

**Evaluate only what was planned.** An employee may only be evaluated on the goals included on the Performance Planning Form and Performance Evaluation Form. If an expectation was not included in the employee's goals or metrics, it cannot be added during the evaluation period.

**Evaluate goals as written.** Goals cannot be changed after the fact, nor can new descriptors, qualifiers, or performance expectations be added during the evaluation period. Employees must be evaluated against the goals and metrics established during planning. If the original goal did not fully capture the intended expectation, that issue should be addressed during the next planning cycle—not during evaluation.

**Be consistent.** Employees performing similar work should be held to comparable standards. Consistency does not mean employees must receive the same ratings; it means similar performance should be evaluated using the same standards and expectations.

---

## A STEP-BY-STEP PROCESS FOR EVALUATING GOALS

### **Step 1: Review the metric.**

Start by reviewing the metric tied to the goal. The metric defines how success is measured, whether through numbers, percentages, or qualifiers such as “accurately” or “on time.” Reviewing the metric helps ensure that performance is evaluated based on what was established during planning and reminds the supervisor what information should have been collected throughout the performance year.

### **Step 2: Gather Supporting Documentation.**

Collect all relevant information about the employee’s performance as it relates to the goal and metric. Supporting documentation may include reports, check-in notes, system data, work records, observed behaviors, or other documentation collected throughout the year.

If the employee was responsible for tracking a goal, the employee should provide the documentation they collected. Employees should also provide information about other duties they performed during the year when applicable.

The more complete the supporting documentation, the clearer and more accurate the evaluation will be.

### **Step 3: Review the Evaluation Scale.**

Review the evaluation scale created for the goal. Ideally, the scale has been used during performance discussions throughout the year and should already be familiar to both the supervisor and employee.

If a scale was not created during planning, create one before evaluating the employee. This is especially important when multiple employees share the same goal because the scale helps supervisors apply the performance standards consistently.

The scale should be based on the following definitions:

- **5 – Exceptional:** Consistently exceeds position requirements.
- **4 – Exceeds Expectations:** Occasionally exceeds position requirements.
- **3 – Successful:** Meets position requirements.
- **2 – Needs Improvement:** Occasionally fails to meet position requirements.
- **1 – Unsuccessful:** Consistently fails to meet position requirements.

#### Step 4: Decide the Rating.

Achieving the goal as written is considered **Successful**. Ratings should not be increased because an employee worked hard or because the supervisor has a positive relationship with the employee. Likewise, ratings should not be lowered because of unrelated frustrations or personal opinions.

Use the evaluation scale and supporting documentation to determine whether the employee's performance was above, below, or at the established standard.

- **Start at Successful.** If the employee met the goal as written, the rating is Successful.
- **Look for patterns above or below.** Determine whether the employee consistently or occasionally exceeded the expectation or consistently or occasionally failed to meet it.
- **Consider scope and impact.** Not every accomplishment or performance problem has the same significance. Consider the size, importance, and impact of the performance when determining the rating.
- **Anchor the rating to supporting documentation.** Match reports, check-in notes, observed behaviors, system data, and other documentation to the evaluation scale. Consider whether the performance occurred once or represented a pattern throughout the year.

#### Step 5: Write the Justification for the Rating.

Once the rating has been determined, write the justification in the **Comments** section for the goal. The justification explains why the rating was assigned and should connect the rating to the supporting documentation collected throughout the performance year.

- **Open with the rating.** Identify whether the employee's performance was Exceptional, Exceeds Expectations, Successful, Needs Improvement, or Unsuccessful.
  - **Support the rating with supporting documentation.** Refer to reports, observed behaviors, check-in notes, system data, or other documentation that demonstrates how the employee performed.
  - **Summarize what the supporting documentation shows overall.** Close by reinforcing why the documented performance supports the selected rating.
-

SAMPLE JUSTIFICATIONS:

*EXAMPLE 1*

**Goal:** Increase the number of applications processed accurately and within established timeframes by 10% over the previous year.

**Rating:** Needs Improvement

**Justification:** Maria's performance on this goal was Needs Improvement. During the previous performance year, Maria processed 3,200 applications. This year, she processed 3,360 applications, representing a 5% increase rather than the 10% increase established in the goal. Monthly system reports showed improvement in processing volume during the second half of the year, but the increase was not sufficient to meet the annual target. Quality reviews showed that Maria generally maintained acceptable accuracy, although several applications required correction during the first and third quarters. Timeliness also improved following coaching during the year, but monthly reports continued to show occasional applications completed outside the established processing deadlines. During regular check-ins, Maria and her supervisor discussed workflow strategies and identified ways to improve both productivity and timeliness. Overall, the supporting documentation shows meaningful improvement in Maria's performance, but she did not fully meet the 10% improvement target or consistently meet the established timeliness expectations. Her performance therefore supports a rating of Needs Improvement.

*EXAMPLE 2*

**Goal:** Demonstrate willingness to accept feedback from the supervisor and incorporate it into future tasks to improve performance.

**Rating:** Successful

**Justification:** Joe's performance on this goal was **Successful**. Supporting documentation collected throughout the year shows that Joe generally accepted supervisory feedback and applied it to subsequent work. In March, Joe received coaching regarding recurring formatting errors in monthly reports. Reports submitted in April and May reflected the requested changes, and the formatting issue did not recur. In June, Joe was coached on providing more complete information in responses to client inquiries. A review of subsequent correspondence showed improvement in both completeness and clarity. During the September check-in, the supervisor discussed two instances in which Joe needed reminders to follow a revised review process. Joe corrected the issue after the discussion and followed the process consistently for the remainder of the year. Quarterly check-in notes also show that Joe was receptive to feedback and asked questions when expectations were unclear. Overall, the supporting documentation shows that Joe accepted feedback and generally incorporated it into future work, meeting the expectations established for this goal.

---

## APPROACHES TO EVALUATING BEHAVIOR GOALS

Behavior-based goals focus on **how an employee performs their work**, so they can be more challenging to evaluate than goals based primarily on outputs, numbers, or deadlines. As with any goal, supervisors should review the metric, supporting documentation, and evaluation scale before determining a rating. However, the approach may differ depending on whether the behavior goal is **corrective** or focused on **growth and development**.

1. **Focus on observable behavior.** Evaluate specific actions and patterns that can be observed and documented. Avoid evaluating personality traits or relying on general impressions. Supporting documentation should show what the employee did, how often the behavior occurred, and how the behavior changed—or did not change—throughout the year.
2. **For corrective behavior goals, focus on improvement and consistency.** Corrective goals are established because a behavior needs to change. Consider whether the employee demonstrated meaningful and sustained improvement, not simply whether the employee made an effort. If the same concern continues to occur throughout the year, the goal may not have been met even if some improvement occurred. Meeting the goal as written is **Successful**; if the employee has not fully met the expectation, the supporting documentation should guide the supervisor to the appropriate lower rating.
3. **For growth behavior goals, focus on progress over time.** Growth goals are intended to strengthen skills, behaviors, or habits and may take time to develop. Consider the employee's intentional effort, application of feedback, and progress toward the expectation established in the goal and metric. Full mastery may not be necessary if the goal was written to measure development or progress.
4. **Use the goal and metric as the standard.** Whether the behavior goal is corrective or developmental, evaluate the employee against what was actually established during planning. The rating should reflect how the employee's documented behavior compares with the goal, metric, and evaluation scale.
5. **Look for patterns, not isolated events.** Behavior is best evaluated across time. A single positive interaction does not necessarily demonstrate sustained improvement, just as one difficult interaction may not represent the employee's overall performance. Review supporting documentation from throughout the performance year to identify the overall pattern.

For both corrective and growth behavior goals, **meeting the goal as written is Successful**. Higher ratings should reflect behavior that is significantly and consistently beyond what was expected, while lower ratings should reflect documented performance that did not meet the established expectation.

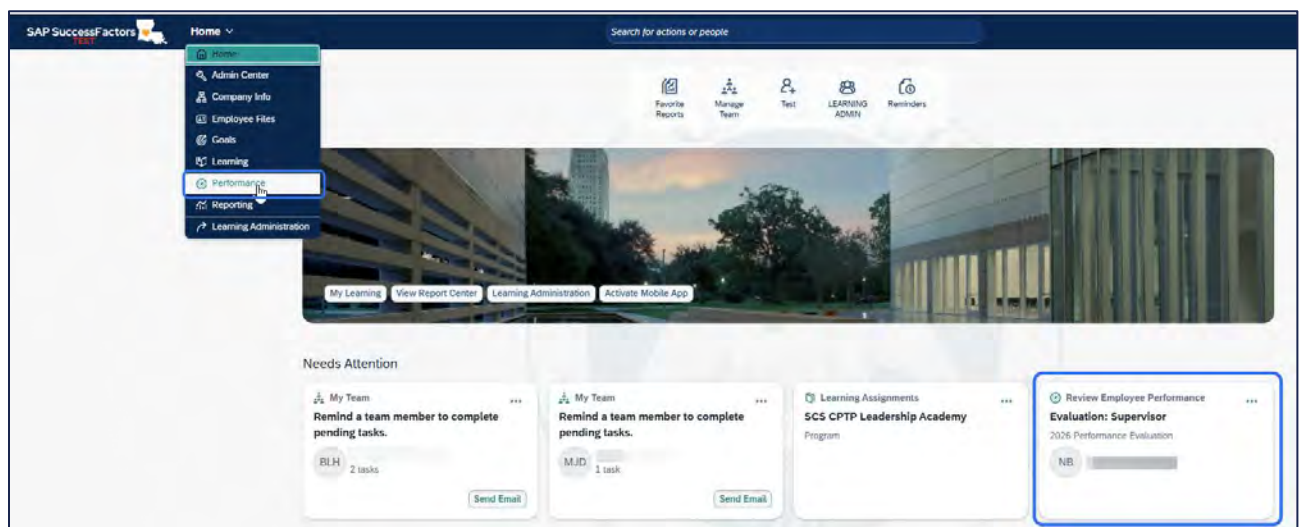
---

## COMPLETING PERFORMANCE EVALUATION FORMS IN SUCCESSFACTORS

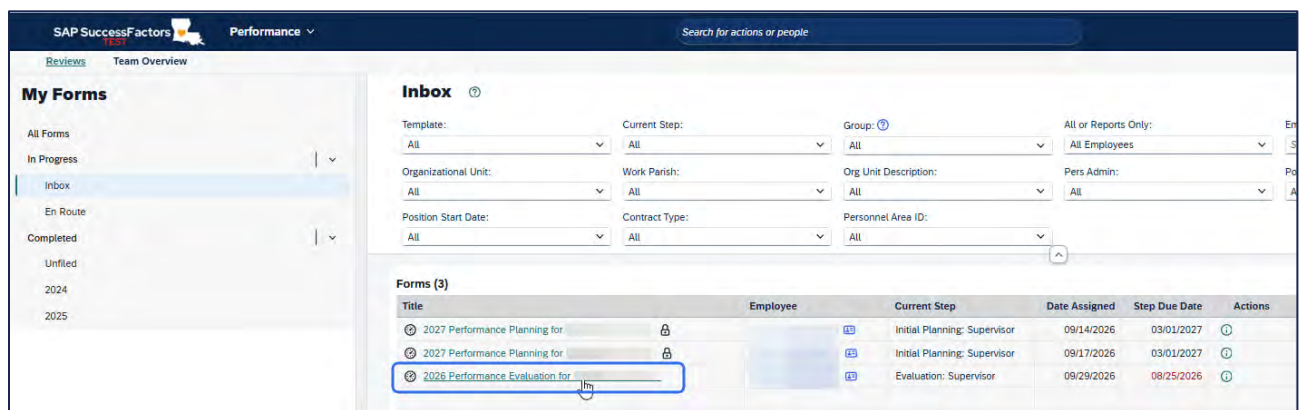
Performance Evaluation Forms in SuccessFactors are launched by the **Agency Administrator**. Once a form has been launched, supervisors can access it to review each goal, enter ratings and comments, and complete the required steps in the evaluation process.

### NAVIGATING TO PERFORMANCE FORMS

1. Navigate to the correct Performance Evaluation Form. Navigation Option 1: Select **Performance** in the **Home** menu. Navigation Option 2: Select the correct **notification box** in the **Needs Attention** section.



2. From your **In Progress - Inbox**, select the correct **Performance Evaluation form**.



## UNDERSTANDING THE PERFORMANCE EVALUATION FORM

1. This is the view of the **Form Details** for an Evaluation form. At the top left of the screen, you will see the **Overall Form Rating** for the employee. The **Overall Form Rating** will only update after at least one goal is rated and you select **Save and Close** at the bottom of the screen.

In the **top right corner**, you have multiple options:

- **History** displays the form and additional information including the form originator, review dates, a document list for this employee, etc.
- Under **Actions**, you have the option to **Legal Scan** the Form or **View Form Information**.
  - A **Legal Scan** checks the form for any questionable or potentially inappropriate language.
  - **View Form Information** provides an **Audit Trail** and **Properties** for the form.
- You may select **Print & PDF** to either print or save a copy of the form.

The **buttons on the bottom right** display the actions you may take with this form. You can **Save and Close** at any time. Also, if the form is incomplete, it will not advance to the next step.

**2026 Performance Evaluation for**

Overall Score: Rating

History Actions Print & PDF

**Route Map**

Current Step: Evaluation: Supervisor Due Date: 08/25/2026 Next Step: Evaluation: 2nd Level Evaluator

**Introduction**

Description

**Employee Information**

|                             |                                      |                          |                      |
|-----------------------------|--------------------------------------|--------------------------|----------------------|
| First Name:                 | Last Name:                           | Job Title:               | Job Code:            |
|                             |                                      | HR CONSULTANT SPECIALIST | 00170870             |
| Personnel Area Description: | Org Unit Description:                | User Number:             | Position Start Date: |
| CS-State Civil Service      | SCS-LEARNING, PERFORMANCE, & CULTURE | P00323795                | 08/24/2018           |

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2025 - 12/31/2026 | 03/01/2027 |

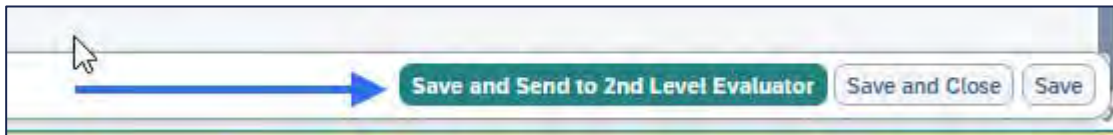
**Goals**

| Goal                                                                                                 | Supervisor Rating*         | Weight | Comment |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|---------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ☆☆☆☆<br>Select a rating... | 20%    | Comment |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ☆☆☆☆<br>Select a rating... | 30%    | Comment |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | ☆☆☆☆<br>Select a rating... | 40%    | Comment |
| Complete all mandatory annual training by October 1, 2026.                                           | ☆☆☆☆<br>Select a rating... | 10%    | Comment |

Save and Send to 2nd Level Evaluator Save and Close Save

- In the bottom right of the screen, you may select **Save** to save your work and continue working; **Save and Close** if you are finished working on the form but it is incomplete; or **Save and Send to 2<sup>nd</sup> Level Evaluator**, if you have finished your evaluation.

NOTE: The **Overall Form Rating** does not calculate in real time. You must **Save** or **Save and Close** for the **Overall Form Rating** to update.



- Use the **Form Navigation panel** on the left to navigate to a specific section of the form.

- The **Route Map** section indicates the Current Step, the Due Date for that step, and the Next Step in the form workflow. **Select the Route Map box or the arrow on the left** to view the Route Map details. Use the **Show More/Show Less** toggle to view the entire route map.

5. More information about the form is included in the following sections: **Form Description**, **Employee Information**, and **Review Dates**.

The screenshot displays the SAP SuccessFactors Performance interface for a 2026 Performance Evaluation. The left sidebar shows the navigation menu with sections: Route Map, Introduction, Employee Information, Review Dates, Goals, Summary Section, and Overall Score. The main content area is titled '2026 Performance Evaluation for' and includes a 'Route Map' section indicating the current step is 'Evaluation: Supervisor' with a due date of 08/25/2026. Below this, the 'Introduction' section provides a welcome message. The 'Employee Information' section lists details for NB, HR CONSULTANT SPECIALIST, including job title, code, and start date. The 'Review Dates' section shows the originator, review period (01/01/2026 - 12/31/2026), and due date (03/01/2027).

6. The **Goals** section is where you will rate and comment on each goal. The **red X icon** indicates the evaluation is not complete. You may also add **Overall Comments on Goal Achievement**. (Ratings and comments are covered in detail in the next section of the manual.)

The screenshot displays the SAP SuccessFactors Performance interface for a 2026 Performance Evaluation, focusing on the 'Goals' section. The left sidebar shows the navigation menu with sections: Route Map, Introduction, Employee Information, Review Dates, Goals, Summary Section, and Overall Score. The main content area is titled '2026 Performance Evaluation for' and includes a 'Route Map' section indicating the current step is 'Evaluation: Supervisor' with a due date of 08/25/2026. Below this, the 'Employee Information' section lists details for NB, HR CONSULTANT SPECIALIST, including job title, code, and start date. The 'Review Dates' section shows the originator, review period (01/01/2026 - 12/31/2026), and due date (03/01/2027). The 'Goals' section contains a table with columns: Goal, Supervisor Rating\*, Weight, and Comment. The table lists four goals with their respective ratings and weights. A red X icon is visible next to the first goal, indicating it is not complete. Below the table, there is a section for 'Overall Comments on Goal Achievement' and 'Supervisor's Comments'.

| Goal                                                                                                 | Supervisor Rating* | Weight | Comment |
|------------------------------------------------------------------------------------------------------|--------------------|--------|---------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Select a rating... | 60%    |         |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Select a rating... | 30%    |         |
| Create 5 eLearning classes with minimal assistance by December 31, 2026.                             | Select a rating... | 40%    |         |
| Complete all mandatory annual training by October 1, 2026.                                           | Select a rating... | 10%    |         |

7. The Summary Section shows the **Overall Form Rating**, **Adjusted Calculated Form Rating**, as well as the rating and weight of each goal. Select the – to see the goals in detail.

NOTE: The system automatically calculates the employee's overall score based on the ratings assigned by the supervisor.

**Summary Section**

| Name                             | Rating                           | Weight |
|----------------------------------|----------------------------------|--------|
| Goals                            | 4.0 - Exceeds Expectations       | 100%   |
| Adjusted Calculated Form Rating: | 4.0 - Exceeds Expectations       |        |
| Overall Form Rating: ⓘ           | ★★★★★ 4.0 - Exceeds Expectations |        |

Overall Comments on Performance  
Supervisor's Comments

Overall Score: 4.0 - Exceeds Expectations

Overall Comments on Goal Achievement  
Supervisor's Comments

**Summary Section**

| Name                             | Rating |
|----------------------------------|--------|
| Goals                            | 4.0    |
| Adjusted Calculated Form Rating: | 4.0    |
| Overall Form Rating: ⓘ           | 4.0    |

Overall Comments on Performance  
Supervisor's Comments

**Ratings in the Goals Section**

| Goal                                                                                                 | Rating               | Weight |
|------------------------------------------------------------------------------------------------------|----------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Exceeds Expectations | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | Exceeds Expectations | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | Exceeds Expectations | 10%    |

## COMPLETING THE PERFORMANCE EVALUATION FORM

When you open the Performance Evaluation Form, you will note that Goals from the Goal Plan / Planning Form have been added automatically.

1. Select **Goals** in the Form Navigation Panel or scroll down until you reach the Goals section of the form. Select the **gauge icon** to review the **Rating Scale**, if necessary.

The screenshot shows the SAP SuccessFactors Performance Evaluation Form. The left navigation panel has 'Goals' selected. The main content area displays the 'Goals' section with a table of goals and their ratings. A 'Rating Scale for the Goals Section' panel is open on the right, showing a scale from 1.0 (Unsuccessful) to 5.0 (Exceptional).

| Goal                                                                                                 | Supervisor Rating* |
|------------------------------------------------------------------------------------------------------|--------------------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Select a rating... |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Select a rating... |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | Select a rating... |
| Complete all mandatory annual training by October 1, 2026.                                           | Select a rating... |

**Rating Scale for the Goals Section**

- 1.0 - Unsuccessful**  
Overall level of performance and quality and/or quantity of work consistently fail to meet the requirements of the position. Employment is at risk and significant improvement is necessary for retention.
- 2.0 - Needs Improvement**  
Overall level of performance and quality and/or quantity of work fail to meet the requirements of the position on more than just an occasional basis. Further development and/or improvements are necessary to be successful in this position.
- 3.0 - Successful**  
Overall level of performance and quality and/or quantity of work meet the requirements of the position.
- 4.0 - Exceeds Expectations**  
Overall level of performance and quality and/or quantity of work exceed the requirements of the position on more than just an occasional basis.
- 5.0 - Exceptional**  
Overall level of performance and quality and/or quantity of work consistently exceed the requirements of the position.

**Overall Score: Rating**

2. Select the **goal** you want to evaluate. This opens a panel on the right.

The screenshot shows the SAP SuccessFactors Performance Evaluation Form with the 'Goals' section selected. A goal is selected, and the 'Evaluation' panel is open on the right, showing the goal description, measurement criteria, and evaluation details.

| Goal                                                                                                 | Supervisor Rating* | Weight | Comment |
|------------------------------------------------------------------------------------------------------|--------------------|--------|---------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Select a rating... | 20%    |         |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Select a rating... | 30%    |         |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | Select a rating... | 40%    |         |
| Complete all mandatory annual training by October 1, 2026.                                           | Select a rating... | 10%    |         |

**Overall Score: Rating**

**Assist with evolving department needs by effectively managing additional tasks and responsibilities.**  
Performance - Dept/Agency

**How will it be measured?**  
Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

**Evaluation**  
Supervisor Rating\*  
Select a rating...  
Supervisor's Comments\*

**More Info on the Goal**  
Start Date: Jan 1, 2026  
Due Date: Dec 31, 2026  
Weight: 20%

- Based on the employee's performance and the supporting documentation collected, rate the employee's performance for each goal. Select the **appropriate star** for the rating selected.

NOTE: This is required. The form will not route if this is not selected.

Assist with evolving department needs by effectively managing additional tasks and responsibilities.

Performance – Dept/Agency

20%

How will it be measured?

Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

Evaluation

Supervisor Rating: \*

★★★★☆ Exceeds Expectations

Supervisor's Comments \*

- Type your justification for this rating in the **Supervisor's Comments** field. You can use the toolbar above the comment box to format your text. Select **Save** after you have completed your rating and justification.

NOTE:

- You must Save each goal before you move to the next.
- You are required to comment on each goal. The form will not route unless this is complete.
- Your comments must be between 10 and 4000 characters. If you do not meet the minimum, no data will be saved in this field.

Assist with evolving department needs by effectively managing additional tasks and responsibilities.

Performance – Dept/Agency

20%

How will it be measured?

Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

Evaluation

Supervisor Rating: \*

★★★★☆ Exceeds Expectations

Supervisor's Comments \*

Nathan exceeded expectations by consistently taking on work outside his regular assignments and completing it with little direction while continuing to meet the expectations of his primary role. For example, when several courses required unplanned updates because of policy, system, or content changes, Nathan absorbed the additional work, coordinated the needed revisions, tested the updated materials, and had them ready for release without delaying his existing projects. He also stepped in to troubleshoot technical issues affecting courses and learners, including problems that required research beyond the normal support process, and followed those issues through to resolution rather than simply identifying the problem and passing it along.

Nathan also supported several time-sensitive department needs during the year. He

2481 characters left. Legal Scan

More Info on the Goal

Start Date: Jan 1, 2026 Due Date: Dec 31, 2026

Weight: 20%

Save

5. Repeat steps 3 & 4 for each goal on the form. The **red X icon** indicates the evaluation is not complete.

**Review Dates**

Originator: [Redacted] Review Period: 01/01/2026 - 12/31/2026 Due Date: 03/01/2027

**Goals**

| Goal                                                                                                 | Supervisor Rating*         | Weight | Comment |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|---------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★☆ Exceeds Expectations | 20%    |         |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★☆ Exceeds Expectations | 30%    |         |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | ★★★★☆ Exceeds Expectations | 40%    |         |
| Complete all mandatory annual training by October 1, 2026.                                           | ★★★★☆ Exceeds Expectations | 10%    |         |

**Overall Comments on Goal Achievement**  
Supervisor's Comments

**Summary Section**

| Name                             | Rating                           | Weight |
|----------------------------------|----------------------------------|--------|
| Goals                            | —                                | 100%   |
| Adjusted Calculated Form Rating: | 4.0 - Exceeds Expectations       |        |
| Overall Form Rating: (4.0)       | ★★★★☆ 4.0 - Exceeds Expectations |        |

**Overall Comments on Performance**  
Supervisor's Comments

**Overall Score: 4.0 - Exceeds Expectations**

**Assist with evolving department needs by effectively managing additional tasks and responsibilities.**

How will it be measured?  
Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

**Evaluation**

Supervisor Rating: ★★★★★ Exceeds Expectations

Supervisor's Comments\*

Nathan exceeded expectations by consistently taking on work outside his regular assignments and completing it with little direction while continuing to meet the expectations of his primary role. For example, when several courses required unplanned updates because of policy, system, or content changes, Nathan absorbed the additional work, coordinated the needed revisions, tested the updated materials, and had them ready for release without delaying his existing projects. He also stepped in to troubleshoot technical issues affecting courses and learners, including problems that required research beyond the normal support process, and followed those issues through to resolution rather than simply identifying the problem and passing it along.

Nathan also supported several time-sensitive department needs during the year. He

2481 characters left Legal Scan

**More Info on the Goal**

Start Date: Jan 1, 2026 Due Date: Dec 31, 2026

Weight: 20%

6. Add **Overall Comments on Goal Achievement**, if desired. Select **Save**.

**NOTE: This field is optional.** Use it to provide a brief summary of the employee's overall performance across all goals, highlight major accomplishments or areas of concern, or add context that may not fit within the comments for an individual goal.

**Overall Comments on Goal Achievement**

Supervisor's Comments:

Empowerment of the technical knowledge and willingness to take ownership of additional work were valuable to the team.

Moving forward, Nathan should continue developing his ability to plan work proactively, communicate project status and potential concerns early, and document processes and technical solutions so that knowledge can be shared across the team. Additional focus on consistently applying quality assurance and accessibility standards throughout development, rather than primarily during final review, will also strengthen his work. As his experience continues to grow, opportunities to share his expertise and provide guidance to other team members will help expand his contribution beyond his individual assignments.

Overall, Nathan demonstrated solid performance across his goals while also showing areas where continued growth can increase his effectiveness and impact.

Legal Scan

**Save**

7. Scroll to the bottom of the form to review the ratings for the employee. The system automatically calculates the employee's overall score based on the ratings assigned by you, the supervisor.

**NOTE: You may not override or change the overall or adjusted calculated form rating.**

**Summary Section**

| Name                                                     | Rating                           | Weight |
|----------------------------------------------------------|----------------------------------|--------|
| Goals                                                    | —                                | 100%   |
| Adjusted Calculated Form Rating:                         | 4.0 - Exceeds Expectations       |        |
| Overall Form Rating:                                     | ★★★★★ 4.0 - Exceeds Expectations |        |
| Overall Comments on Performance<br>Supervisor's Comments |                                  |        |

Overall Score: 4.0 - Exceeds Expectations

8. Add **Overall Comments on Performance**.

**NOTE: This field is optional.** Use it to provide context about the employee's performance that is not tied to a specific goal, such as significant contributions, additional responsibilities, overall work habits, or other relevant performance information.

**SAP SuccessFactors Performance**

2026 Performance Evaluation for  
Overall Score: 4.0 - Exceeds Expectations

**Review Dates**

Originator: [Name] Review Period: 01/01/2026 - 12/31/2026 Due Date: 03/01/2027

**Goals**

| Goal                                                                                                 | Supervisor Rating*         | Weight | Comment |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|---------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★★ Exceeds Expectations | 20%    |         |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★★ Exceptional          | 30%    |         |
| Create 5 eLearning classes with minimal assistance by December 31, 2026.                             | ★★★★★ Successful           | 40%    |         |
| Complete all mandatory annual training by October 1, 2026.                                           | ★★★★★ Successful           | 10%    |         |

Overall Comments on Goal Achievement  
Supervisor's Comments

**Summary Section**

| Name                                                     | Rating                           | Weight |
|----------------------------------------------------------|----------------------------------|--------|
| Goals                                                    | —                                | 100%   |
| Adjusted Calculated Form Rating:                         | 4.0 - Exceeds Expectations       |        |
| Overall Form Rating:                                     | ★★★★★ 4.0 - Exceeds Expectations |        |
| Overall Comments on Performance<br>Supervisor's Comments |                                  |        |

Overall Score: 4.0 - Exceeds Expectations

**Overall Comments on Performance**

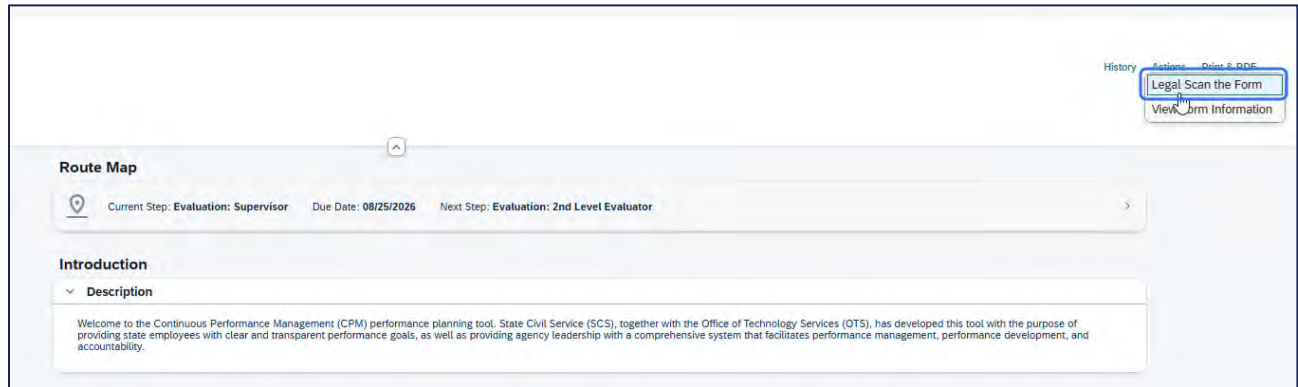
Supervisor's Comments

Paragraph Default

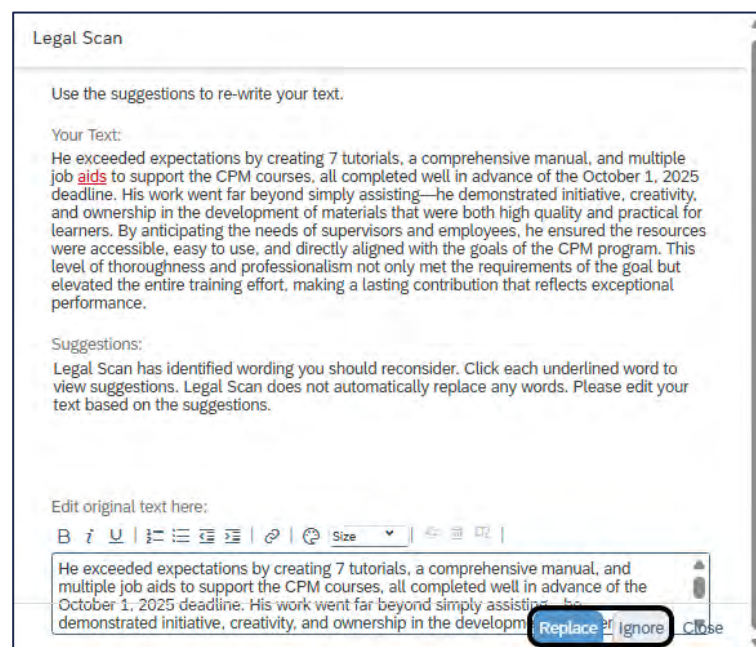
Save and Send to 2nd Level Evaluator Save and Close Save

9. Once you have added all of your comments, you may want to do a **Legal Scan** to ensure your language is appropriate. To do this, scroll to the top of the document, select **Actions** then **Legal Scan**.

NOTE: This is optional.

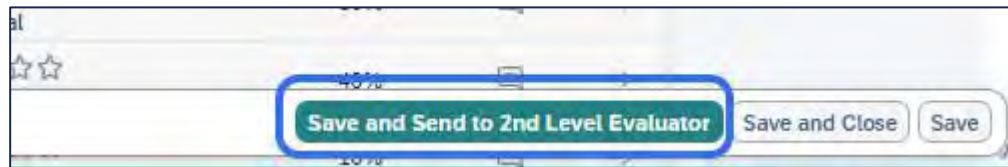


10. A separate window will open. Revise as needed.

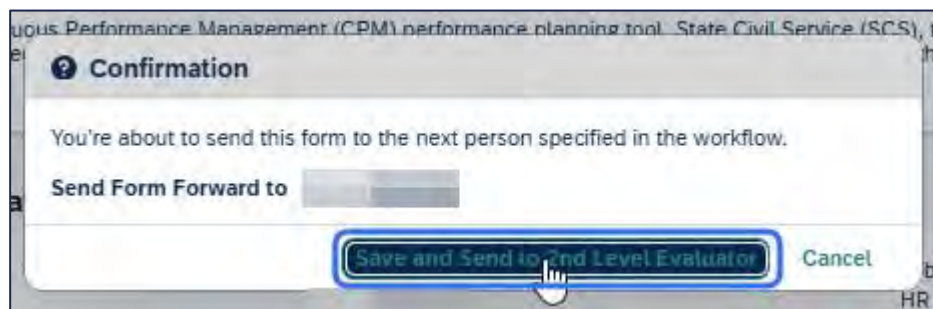


11. If you are finished with the form, select **Save and Send to 2<sup>nd</sup> Level Evaluator**.

NOTE: Once you send the form to the 2nd Level Evaluator, you will be able to view the form, but you will not be able to edit the form in any way.



12. A confirmation window will open. Select **Save and Send to 2nd Level Evaluator** to move the form to the next step in the Route Map.



## 2<sup>ND</sup> LEVEL EVALUATOR'S ROLE – EVALUATION

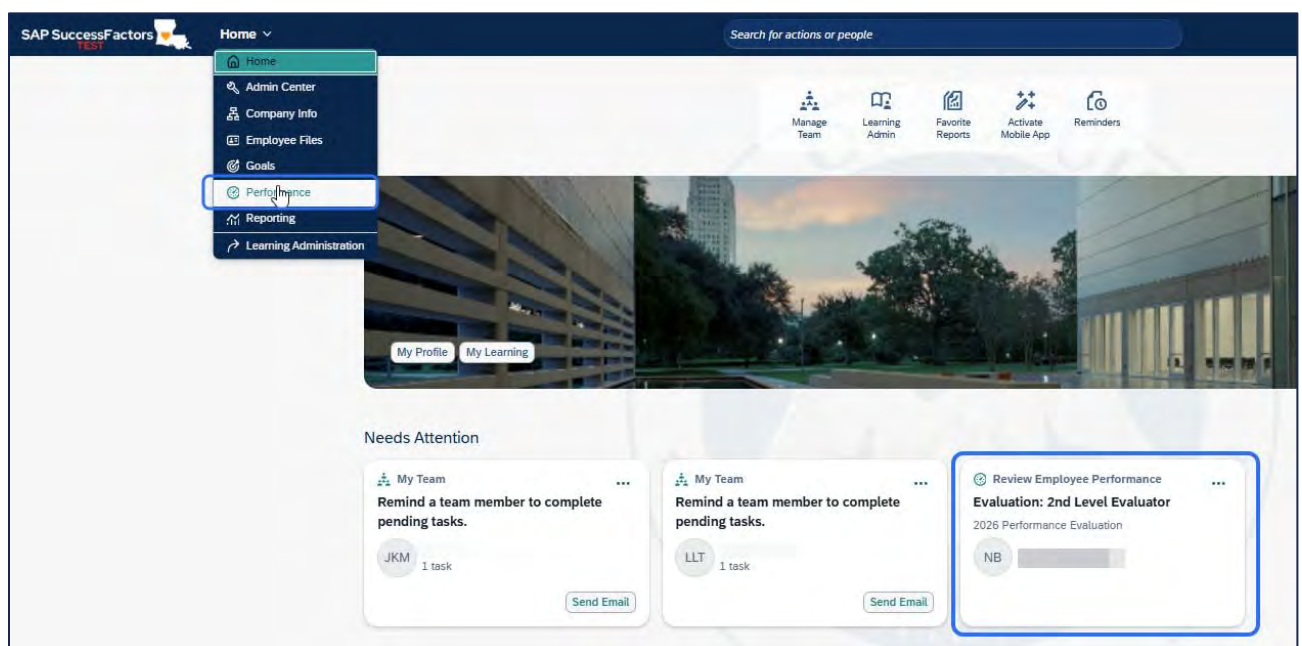
The 2nd Level Evaluator plays an important quality-control role in the performance evaluation process by helping ensure ratings are fair, well-supported, and consistently applied.

The 2nd Level Evaluator should:

1. **Review the appropriateness of the rating.** Confirm that the rating aligns with the employee's documented performance and that sufficient supporting documentation is included to justify the rating.
2. **Check for consistency across employees.** Consider whether the rating is consistent with ratings given to employees in similar positions, with comparable job duties, responsibilities, and levels of performance.

## 2<sup>ND</sup> LEVEL EVALUATOR – REVIEWING AND APPROVING PERFORMANCE EVALUATION FORM

1. Navigate to the correct Performance Evaluation Form. Navigation Option 1: Select **Performance** in the **Home** menu. This will take you to your **In Progress – Inbox**. Navigation Option 2: Select the correct notification box in the **Needs Attention** section. This will open the form directly.



- If you selected **Performance** in the **Home** menu, you will need to **select the correct form** in your **In Progress - Inbox**.

The screenshot shows the SAP SuccessFactors Performance Inbox. On the left, under 'My Forms', the 'In Progress' section is expanded, and 'Inbox' is selected. The main area displays various filters for Template, Current Step, Group, Organizational Unit, Work Parish, Org Unit Description, Position Start Date, Contract Type, and Personnel Area ID. Below the filters, a table titled 'Forms (1)' lists available forms. The first form is highlighted:

| Title                              | Employee      | Current Step                  | Date Assigned | Step Due Date | Form Start D... |
|------------------------------------|---------------|-------------------------------|---------------|---------------|-----------------|
| 2026 Performance Evaluation for... | [Employee ID] | Evaluation: 2nd Level Eval... | 10/01/2026    | 08/25/2026    | 01/01/2026      |

- Scroll to the **Goals** section of the form. Select each goal to open a panel on the right. Then, **review the rating and comments**.

The screenshot shows the '2026 Performance Evaluation for' form. The 'Goals' section is active, displaying a list of goals with their ratings and weights. The first goal is selected, opening a detailed panel on the right.

| Goal                                                                                                 | Supervisor Rating          | Weight |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★★ Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★★ Exceeds Expectations | 30%    |
| Create 5 clearing clinics with minimal assistance by December 31, 2026.                              | ★★★★★ Successful           | 40%    |
| Complete all mandatory annual testing by October 1, 2026.                                            | ★★★★★ Successful           | 10%    |

The detailed view of the first goal shows the following information:

- Goal:** Assist with evolving department needs by effectively managing additional tasks and responsibilities.
- Supervisor Rating:** ★★★★★ Exceeds Expectations
- Weight:** 20%
- Comments:** Nathan exceeded expectations by consistently taking on work outside his regular assignments and completing it with little direction while continuing to meet the expectations of his primary role. For example, when several courses required unplanned updates because of policy, system, or content changes, Nathan absorbed the additional work, coordinated the needed revisions, tested the updated materials, and had them ready for release without delaying his existing projects. He also stepped in to troubleshoot technical issues affecting courses and elements, including problems that required research beyond the normal support process, and followed those issues through to resolution rather than simply identifying the problem and passing it along. Nathan also supported several time-sensitive department needs during the year. He assisted with last-minute course launches, helped coworkers resolve Storyline and LMS issues, and took responsibility for archival tasks when competing deadlines created gaps in coverage. On multiple projects, he identified potential problems before they affected learners and made adjustments without needing extensive supervisor follow-up. Despite the additional workload, his regularly assigned projects remained on schedule and met established quality standards. His ability to take ownership of unexpected work, respond quickly when priorities shifted, and maintain the quality of his primary responsibilities demonstrates performance above the level normally expected for this goal.

4. Select **Overall Comments on Goal Achievement** to open the panel for review.

NOTE: The system does not indicate if comments have been added. You must select this box to open the panel for review.

**2026 Performance Evaluation for**

Personnel Area Description: CS-State Civil Service | Org Unit Description: SSC-LEARNING, PERFORMANCE, & CULTURE | User Number: P90322795 | Position Start Date: 09/24/2018

**Review Dates**  
 Originator: | Review Period: 01/01/2026 - 12/31/2026 | Due Date: 03/01/2027

| Goal                                                                                                 | Supervisor Rating          | Weight |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★★ Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★★ Exceptional          | 30%    |
| Create 5 e-learning classes with minimal assistance by December 31, 2026.                            | ★★★★★ Successful           | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | ★★★★★ Successful           | 10%    |

**Overall Comments on Goal Achievement**

**Section Comments from Others (1)**  
 (Manager)  
 LLT  
 Nathan met the expectations of his assigned performance goals and made meaningful contributions throughout the performance year. He completed required e-learning development work, supported the creation and revision of CPM training materials, and responded effectively when additional assignments or changing priorities required his assistance. He demonstrated increasing independence in course development and technical problem-solving and generally required limited supervisory assistance for routine work.  
 Nathan also contributed beyond his primary assignments by troubleshooting technical issues, assisting coworkers, and helping ensure learning materials were ready for implementation. His technical knowledge and willingness to take ownership of additional work were valuable to the team. Moving forward, Nathan should continue developing his ability to plan work proactively, communicate project status and external concerns early, and document processes and technical solutions so that knowledge can be shared across the team. Additional focus on consistently applying quality assurance and accessibility standards throughout development, rather than primarily during final review, will also strengthen his work. As his experience continues to grow, opportunities to share his expertise and provide guidance to other team members will help expand his contribution beyond his individual assignments.  
 Overall, Nathan demonstrated solid performance across his goals while also showing areas where continued growth can increase his effectiveness and impact.

5. The Summary Section shows the **Overall Form Rating**, **Adjusted Calculated Form Rating**, as well as the rating and weight of each goal. Select the – to see the goals in detail.

NOTE: **You cannot change the Adjusted Calculated Form Rating.** The system automatically calculates the employee's overall score based on the ratings assigned by the supervisor.

**Summary Section**

| Name  | Rating                     | Weight |
|-------|----------------------------|--------|
| Goals | 4.0 - Exceeds Expectations | 100%   |

**Adjusted Calculated Form Rating:** 4.0 - Exceeds Expectations

**Overall Form Rating:** 4.0 - Exceeds Expectations

**Overall Comments on Performance**  
 Supervisor's Comments

**Overall Score: 4.0 - Exceeds Expectations**

**Ratings in the Goals Section**

| Goal                                                                                                 | Rating               | Weight |
|------------------------------------------------------------------------------------------------------|----------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Exceeds Expectations | 30%    |
| Create 5 e-learning classes with minimal assistance by December 31, 2026.                            | Exceeds Expectations | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | Exceeds Expectations | 10%    |

6. Select **Overall Comments on Performance** to review.

NOTE: The system does not indicate if comments have been added. You must select this box to open the panel for review.

The screenshot shows the SAP SuccessFactors Performance Evaluation form for Nathan Barnaba. The form is divided into several sections: Route Map, Introduction, Employee Information, Review Dates, Goals, and Summary Section. The 'Overall Comments on Performance' panel is highlighted on the right side of the form.

| Goal                                                                                                 | Supervisor Rating          | Weight |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★★ Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★★ Exceptional          | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | ★★★★★ Successful           | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | ★★★★★ Successful           | 10%    |

| Name                             | Rating                     | Weight |
|----------------------------------|----------------------------|--------|
| Goals                            | 4.0 - Exceeds Expectations | 100%   |
| Adjusted Calculated Form Rating: | 4.0 - Exceeds Expectations |        |
| Overall Form Rating:             | 4.0 - Exceeds Expectations |        |

7. If you are not ready to send the form, select **Save** or **Save and Close**.

The screenshot shows the bottom of the SAP SuccessFactors Performance Evaluation form. The buttons are: 'Save and Send to Evaluation Discussion', 'Save and Close', 'Save', and 'Send Back to Supervisor'. The 'Save and Close' button is highlighted with a blue border.

8. If you do not approve the evaluation, select **Send Back to Supervisor**.

NOTE: You will need to contact the supervisor to discuss why you are returning the form.

The screenshot shows the bottom of the SAP SuccessFactors Performance Evaluation form. The buttons are: 'Save and Send to Evaluation Discussion', 'Save and Close', 'Save', and 'Send Back to Supervisor'. The 'Send Back to Supervisor' button is highlighted with a blue border.

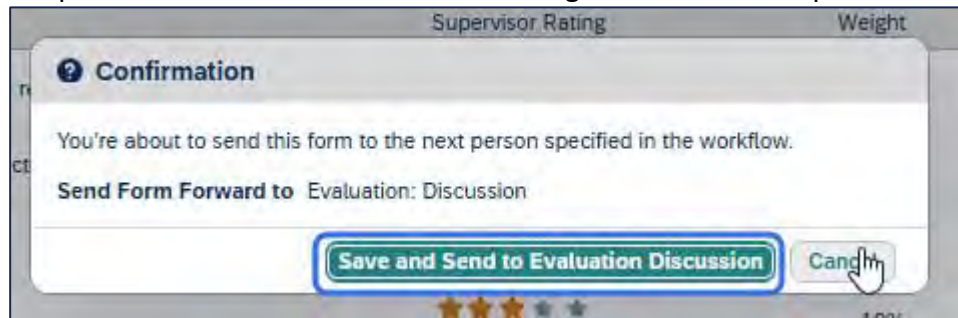
9. To approve the evaluation, select **Save and Send to Evaluation Discussion**.

NOTE: This is required to move the form to the next stage in the Route Map.

The screenshot shows the bottom of the SAP SuccessFactors Performance Evaluation form. The buttons are: 'Cancel', 'Save and Close', 'Send Back to Supervisor', and 'Save and Send to Evaluation Discussion'. The 'Save and Send to Evaluation Discussion' button is highlighted with a blue border.

10. A confirmation window will open. Select **Save and Send to Evaluation Discussion**. The next step is collaborative, so **the form will be sent to both the supervisor and the employee simultaneously**.

NOTE: This is required to move the form to the next stage in the Route Map.



## MEETING WITH YOUR 2<sup>ND</sup> LEVEL EVALUATOR

The 2nd Level Evaluator may meet with supervisors before approving Performance Evaluation Forms to review employee ratings and supporting documentation. This meeting provides an opportunity to discuss how ratings were determined, ask questions, and address any concerns before the evaluation is finalized. If the 2nd Level Evaluator has questions about a rating or does not believe the supporting documentation supports the rating, the supervisor should be prepared to review the evaluation and discuss the basis for the rating.

To prepare for the meeting:

- **Follow agency timelines and procedures.** Agencies may establish their own deadlines or additional requirements for evaluation review. Supervisors who are unsure of agency requirements should contact their HR department.
  - **Review the completed evaluation before the meeting.** Be prepared to explain the rating assigned to each goal, the justification entered on the form, and how the overall rating was calculated.
  - **Have supporting documentation available.** This may include the Performance Evaluation Form, the employee's position description, the evaluation scale used for each goal, and supporting documentation such as reports, system data, check-in notes, or other records used to determine the ratings.
  - **Be prepared to explain each rating.** Supervisors should be able to connect the rating to the goal and metric, describe what the supporting documentation shows, and explain why the employee's performance falls at that point on the evaluation scale.
  - **Be prepared to discuss consistency.** The 2nd Level Evaluator may compare ratings across employees performing similar work. Supervisors should be prepared to explain how comparable performance was evaluated and how consistent standards were applied across similarly situated employees.
-

## CONDUCTING THE EVALUATION DISCUSSION

**WHAT:** The Evaluation Discussion is the formal conversation between the supervisor and employee about the employee's completed performance evaluation. During the discussion, the supervisor reviews each goal and the overall rating, explains how the ratings were determined using supporting documentation, recognizes areas of successful performance, and discusses any areas that need improvement. The employee should also have an opportunity to ask questions, reflect on their performance, and discuss next steps for continued success or improvement.

**WHEN:** Supervisors should prepare for and schedule the Evaluation Discussion before sending the Performance Evaluation Form to the 2nd Level Evaluator. **Once the 2nd Level Evaluator approves the form, it is immediately available to both the supervisor and employee**, so the discussion should take place promptly. Evaluation Discussions must be completed no later than March 1 of each performance year.

**WHY:** The Evaluation Discussion gives the supervisor and employee an opportunity to talk through the completed evaluation and make sure the employee understands how their performance was assessed. It provides an opportunity to recognize accomplishments, clearly explain areas where expectations were not met, and establish what the employee should continue or improve going forward.

The evaluation should not be the first time an employee learns how they have been performing. Regular performance discussions throughout the year should have provided ongoing feedback about progress and current performance. The Evaluation Discussion brings those conversations together by providing clarity about the final ratings and establishing a path forward.

---

## PERFORMANCE EVALUATION SESSIONS – SCS RULE 10.7

Performance evaluations sessions shall be conducted after the performance evaluation year has ended and rendered no later than March 1. All performance evaluation ratings shall be recorded with an effective date of January 1.

The Evaluating Supervisor shall base the evaluation of the employee's performance on the goals as stated on the performance planning form.

To render a performance evaluation, the Evaluating Supervisor shall:

1. Complete a performance evaluation form and session between January 1 and March 1.
2. Sufficiently support the performance evaluation rating with comments and attach supporting documentation as deemed appropriate. In the case of an **Unsuccessful** rating, comments and documentation combined must be sufficient to support the rating, any potential disciplinary action, and apprise the employee of deficiencies in sufficient detail for the employee to provide defense/explanation in an agency review or appeal setting.
3. Obtain the Second Level Evaluator's concurrence and signature on the performance evaluation form prior to discussion with the employee.
4. Discuss the evaluation with the employee. Following the discussion, the Evaluating Supervisor and the employee shall sign indicating the evaluation session occurred.
5. Provide the employee with a copy of or access to the completed performance evaluation form and any supporting documentation.

An employee cannot prevent the performance evaluation form from becoming official by refusing to attend the performance evaluation session and/or refusing to acknowledge the performance evaluation form. Should the employee refuse to attend the performance evaluation session and/or acknowledge the performance evaluation form, the Evaluating Supervisor shall document the refusal on the performance evaluation form.

---

## SUPERVISOR EVALUATION DISCUSSION CHECKLIST

The Evaluation Discussion is an important part of the performance management process and should be approached thoughtfully. Preparing in advance, conducting the conversation clearly and respectfully, and following through afterward can help ensure the employee understands the evaluation, the reasons for the ratings, and what comes next.

Use the following checklist to help prepare for, conduct, and follow up on the Evaluation Discussion.

### BEFORE THE DISCUSSION

1. **Schedule promptly.** Schedule your evaluation discussion before you send the form to the 2<sup>nd</sup> Level Evaluator. Remember, your employees received the approved Performance Evaluation Form at the same time you did. Do not make them wait for the opportunity to discuss the ratings.
2. **Choose a private setting.** These conversations are confidential—use a private office or a reserved meeting room where others cannot overhear.
3. **Review the evaluation form.** Revisit the goals and ratings to refresh both your memory and the employee's on the standards they were expected to meet.
4. **Review the overall rating.** You may need to explain how the overall rating is calculated by the system and is based on weighted goals. Since each goal is weighted differently, the goals with a higher weight impact the overall score more than lower weighted scores.

### DURING THE DISCUSSION

1. **Create a respectful tone.** Begin by acknowledging contributions and setting a professional, constructive environment.
2. **Explain ratings clearly.** Walk through each goal and the overall rating, making sure the employee understands how the score was determined.
3. **Address areas for improvement.** If there is an area of performance an employee needs to improve, be sure to set clear expectations on how employees can become successful. Consider developing an action plan together.
4. **Highlight positive performance.** Regardless of the rating, point out at least one area of strength. Balancing feedback helps maintain engagement and motivation.
5. **Document the discussion.** Complete the **Evaluation Discussion** section of the form.
6. **Confirm next steps.** Review your expectations and the process for the employee signing the form.

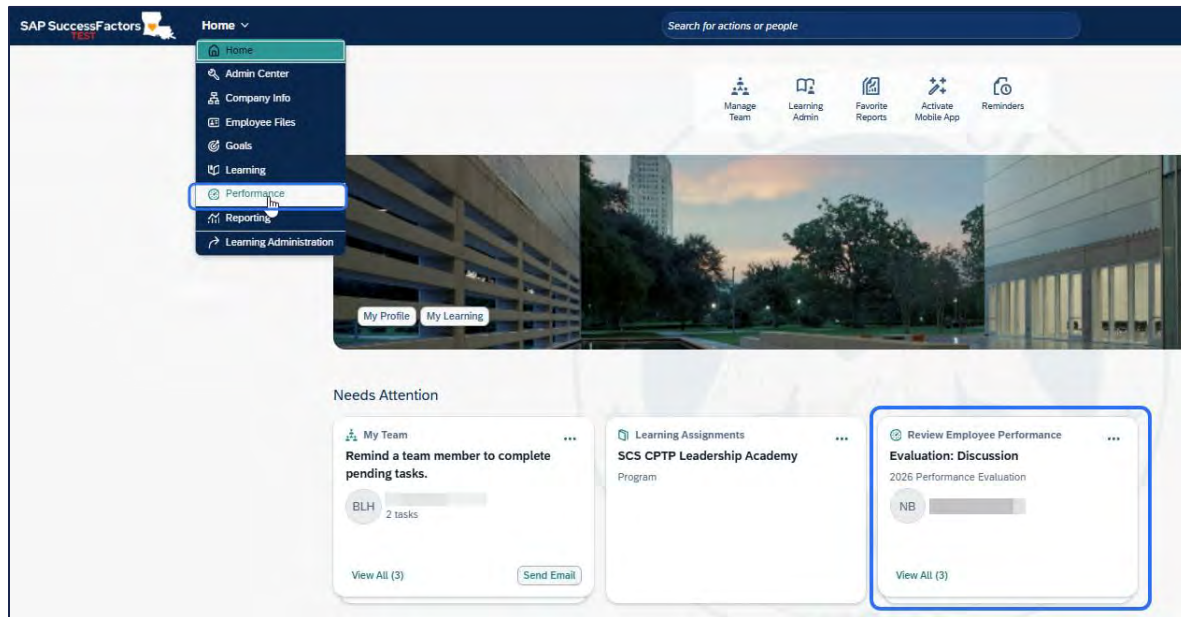
## AFTER THE DISCUSSION

1. **Document the results of the discussion.** Complete the Evaluation Discussion section of the Performance Evaluation Form by selecting the appropriate result and entering the date of the discussion. Then send the form to the employee for acknowledgement. If the employee refuses to acknowledge the evaluation, document the refusal. Refusal to acknowledge the form does not prevent the evaluation from becoming official.
  2. **Provide a copy or access to the completed form.** Employees must be provided a copy of or access to their completed Performance Evaluation Form. In SuccessFactors, supervisors may show employees how to access the completed form or provide a printed copy when appropriate.
  3. **Reflect on your role.** Consider how your supervision, communication, feedback, coaching, and support contributed to the employee's performance during the year and where you may need to make adjustments going forward.
  4. **Strengthen your performance management process.** Use what you learned during the evaluation to improve how you manage performance throughout the next year. Consider whether you need to establish more regular check-ins, improve how performance is documented, clarify how progress will be tracked, or create better systems for collecting the information needed to support future feedback and evaluations.
-

## SUPERVISOR - DOCUMENTING THE EVALUATION DISCUSSION

Document the Evaluation Discussion on the SAME day you conduct it. The system will indicate what date you select the evaluation discussion date. Backdating or advance dating may result in an audit finding.

1. Navigate to the employee's **Performance Evaluation Form**.



2. Select **Evaluation Discussion** or scroll down to that section.

The screenshot shows the '2026 Performance Evaluation for NATHAN BARNABA' form. The left-hand navigation menu is open, and the 'Evaluation Discussion' option is highlighted with a blue box. The main content area displays a table of goals and an 'Evaluation Discussion' section. The 'Evaluation Discussion' section is highlighted with a blue box and contains the following fields:

| Goal                                                                                                 | Supervisor Rating          | Weight | Comments |
|------------------------------------------------------------------------------------------------------|----------------------------|--------|----------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | ★★★★★ Exceeds Expectations | 20%    |          |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | ★★★★★ Exceptional          | 30%    |          |
| Create 5 eLearning classes with minimal assistance by December 31, 2026.                             | ★★★★★ Successful           | 40%    |          |
| Complete all mandatory annual training by October 1, 2026.                                           | ★★★★★ Successful           | 10%    |          |

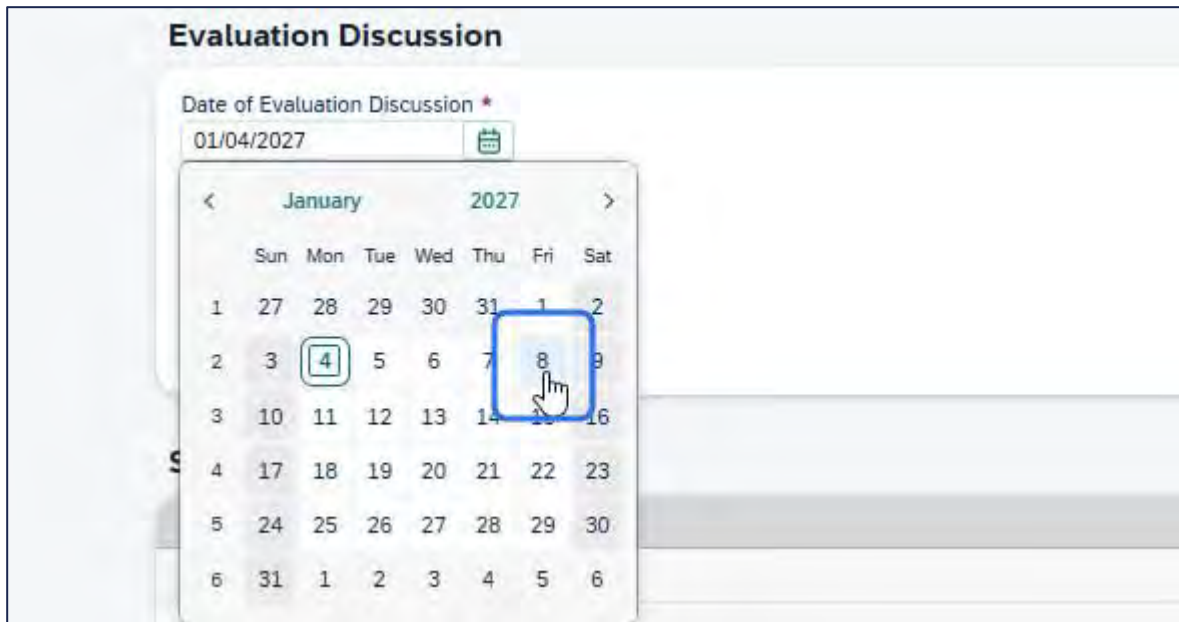
**Evaluation Discussion**

Date of Evaluation Discussion \*  
e.g. 2026-12-31

Results of Evaluation Discussion \*

Supervisor's Signature \*  
Enter your text

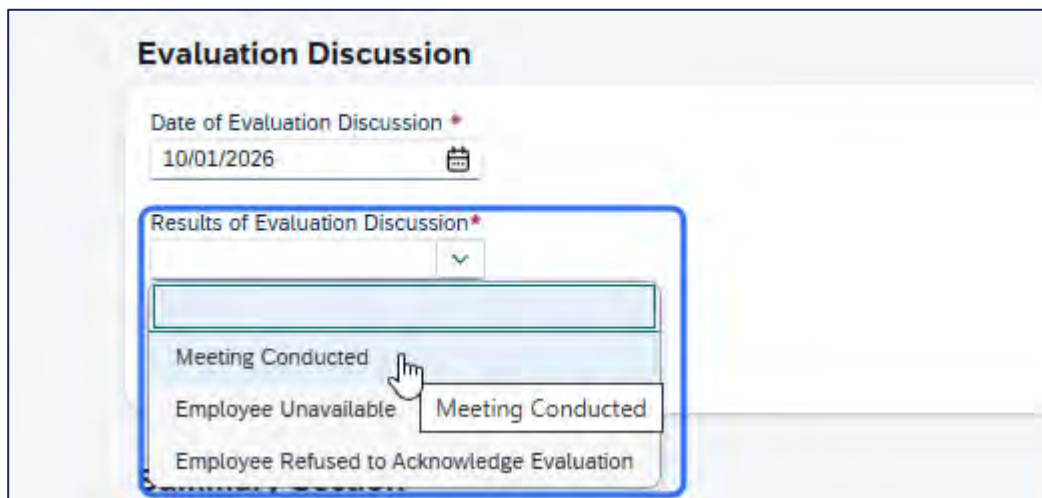
3. Select the **date** the Evaluation Discussion was conducted.



The screenshot shows the 'Evaluation Discussion' form. The 'Date of Evaluation Discussion' field is set to 01/04/2027. A calendar pop-up is displayed for January 2027. The date 4 is highlighted with a blue square, and a hand cursor is pointing at the date 8.

|   | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|-----|-----|-----|-----|-----|-----|-----|
| 1 | 27  | 28  | 29  | 30  | 31  | 1   | 2   |
| 2 | 3   | 4   | 5   | 6   | 7   | 8   | 9   |
| 3 | 10  | 11  | 12  | 13  | 14  | 15  | 16  |
| 4 | 17  | 18  | 19  | 20  | 21  | 22  | 23  |
| 5 | 24  | 25  | 26  | 27  | 28  | 29  | 30  |
| 6 | 31  | 1   | 2   | 3   | 4   | 5   | 6   |

4. Select the **Results of Evaluation Discussion**. You have 3 options to choose from:
- Select **Meeting Conducted** when you have met with your employee and discussed their goals.
  - If your employee is on FMLA or other extended leave, you may need to select **Employee Unavailable**. Before making this selection, please consult with your HR to ensure you are complying with State Civil Service rules.
  - Your third option is **Employee Refused to Acknowledge Evaluation**. Use this when you have met with your employee and the employee says they will not sign the evaluation form.



The screenshot shows the 'Evaluation Discussion' form. The 'Date of Evaluation Discussion' field is set to 10/01/2026. The 'Results of Evaluation Discussion' dropdown menu is open, showing three options: 'Meeting Conducted', 'Employee Unavailable', and 'Employee Refused to Acknowledge Evaluation'. A hand cursor is pointing at the 'Meeting Conducted' option.

| Results of Evaluation Discussion*          |
|--------------------------------------------|
| Meeting Conducted                          |
| Employee Unavailable                       |
| Employee Refused to Acknowledge Evaluation |

5. Select the **Supervisor's Signature** box. Type your name in the box.

**Evaluation Discussion**

Date of Evaluation Discussion \*  
10/01/2026

Results of Evaluation Discussion\*  
Meeting Conducted

Supervisor's Signature\*  
Enter your text  
Enter 2 to 75 characters.

6. Scroll to the bottom of the page and select **Acknowledge Evaluation and Send to Employee**.

Acknowledge Evaluation and Send to Employee Save and Close Save

7. A confirmation window will open. If you are finished with the form, select **Acknowledge Evaluation and Send to Employee**.

NOTE: A copy of the form will appear in your **En Route** folder. Once the employee has signed the form, a copy of the completed form can be found in the **Completed - Unfiled** folder in My Forms.

**Confirmation**

You're about to route this form to another person to gather their signature. This form will be sent in read-only format to the recipient's Inbox. A copy will appear in your En Route folder.

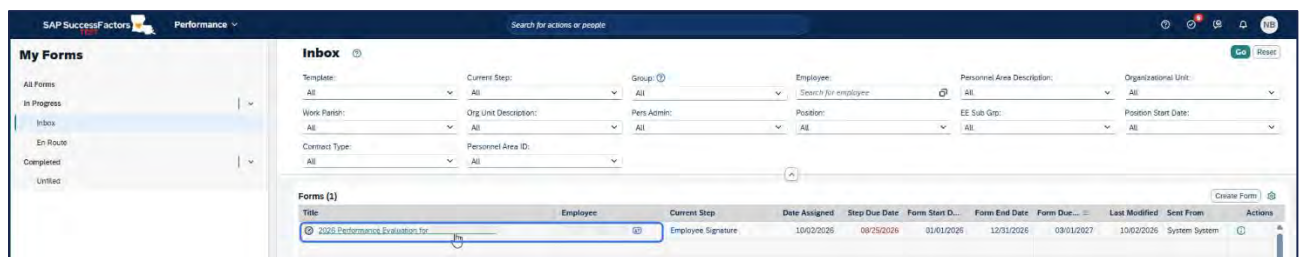
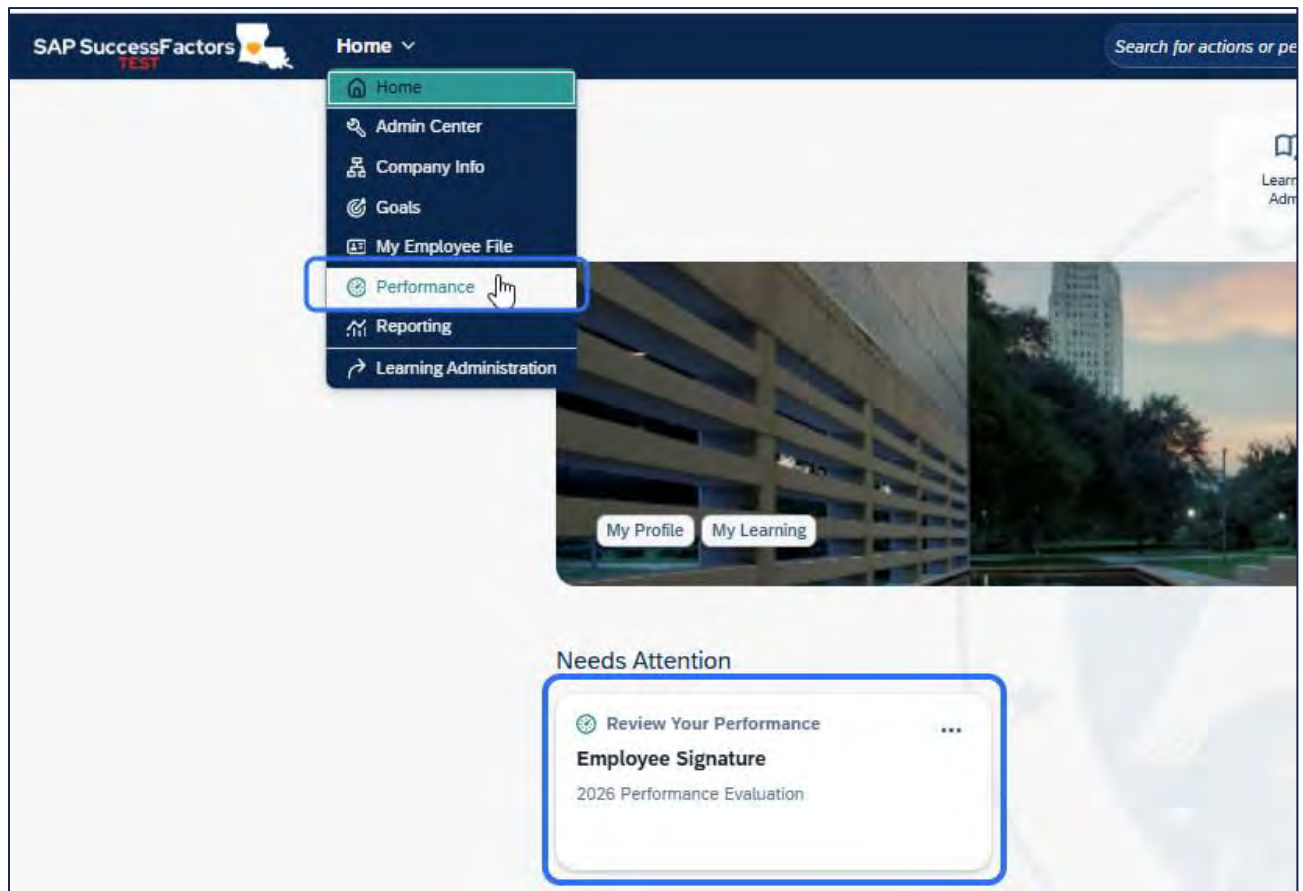
Send Form Forward to

Acknowledge Evaluation and Send to Employee Cancel

## EMPLOYEE – SIGNING THE EVALUATION

An employee's signature or electronic acknowledgement confirms that the Performance Evaluation Form was received and discussed. It does not indicate agreement with the rating. If the employee refuses to sign or acknowledge the form, the refusal will be documented and will not prevent the evaluation from becoming official.

1. Select the correct card in the **Needs Attention** section of your dashboard OR select **Performance** in the **Home** menu. Then, select the link to open your form.



2. In the top right corner, you have multiple options:

- **History** displays the form and additional information including the form originator, review dates, a document list for this employee, etc.
- Under **Actions**, you have the option to **Legal Scan** the Form or **View Form Information**.
  - A **Legal Scan** checks the form for any questionable or potentially inappropriate language.
  - **View Form Information** provides an **Audit Trail** and **Properties** for the form.
- You may select **Print & PDF** to either print or save a copy of the form.



3. To review your Goals in detail, select **each goal** or the > to the right of the goal. Select the X at the top right to close the side panel.

**2026 Performance Planning for**

HR CONSULTANT SPECIALIST

**Route Map**

Current Step: Initial Planning: 2nd Level Evaluator Due Date: 03/01/2026 Next Step: Planning Discussion

**Introduction**

> Description

**Employee Information**

|                             |                                      |                          |                      |
|-----------------------------|--------------------------------------|--------------------------|----------------------|
| First Name:                 | Last Name:                           | Job Title:               | Job Code:            |
|                             |                                      | HR CONSULTANT SPECIALIST | 00170870             |
| Personnel Area Description: | Org Unit Description:                | User Number:             | Position Start Date: |
| CS-State Civil Service      | SCS-LEARNING, PERFORMANCE, & CULTURE | P00323795                | 09/24/2018           |

**Review Dates**

|             |                         |            |
|-------------|-------------------------|------------|
| Originator: | Review Period:          | Due Date:  |
|             | 01/01/2026 - 12/31/2026 | 03/02/2026 |

**Goals**

| Goal                                                                                                 | Weight |
|------------------------------------------------------------------------------------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |

**Assist with evolving department needs by effectively managing additional tasks and responsibilities.**

Performance - Dept/Agency

20%

**How will it be measured?**

Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance standards.

**More info on the Goal**

|             |              |
|-------------|--------------|
| Start Date: | Due Date:    |
| Jan 1, 2026 | Dec 31, 2026 |
| Weight:     |              |
| 20%         |              |

4. Select **Overall Comments on Goal Achievement** to review these comments.

The screenshot shows the SAP SuccessFactors Performance form for a 2026 Performance Evaluation. The 'Overall Comments on Goal Achievement' section is highlighted. It displays a table of goals with their weights and a summary of the evaluation discussion.

| Goal                                                                                                 | Weight |
|------------------------------------------------------------------------------------------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | 10%    |

The 'Overall Comments on Goal Achievement' section is highlighted in blue. It contains a summary of the evaluation discussion, including the date of the discussion (01/08/2027) and the results of the discussion (Meeting Conducted).

5. Review the **Summary Section**, including **Goals**, **Adjusted Calculated Form Rating**, and **Overall Form Rating**. Select – to view ratings used to calculate the **Overall Form Rating**.

The screenshot shows the SAP SuccessFactors Performance form for a 2026 Performance Evaluation. The 'Summary Section' is highlighted, showing the 'Adjusted Calculated Form Rating' and 'Overall Form Rating'. A blue arrow points from the 'Adjusted Calculated Form Rating' to the 'Ratings in the Goals Section'.

**Summary Section**

Name: [Redacted]

Goals: [Redacted]

Adjusted Calculated Form Rating: [Redacted]

Overall Form Rating: [Redacted]

**Ratings in the Goals Section**

| Goal                                                                                                 | Rating               | Weight |
|------------------------------------------------------------------------------------------------------|----------------------|--------|
| Assist with evolving department needs by effectively managing additional tasks and responsibilities. | Exceeds Expectations | 20%    |
| Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2026.  | Exceptional          | 30%    |
| Create 5 elearning classes with minimal assistance by December 31, 2026.                             | Successful           | 40%    |
| Complete all mandatory annual training by October 1, 2026.                                           | Successful           | 10%    |

6. Review the form **Description**. You may add comments to your evaluation form. If you add comments, select **Legal Scan** to check your comments for any inappropriate language.

NOTE: Comments are optional.

The screenshot shows the SAP SuccessFactors Performance form for a 2026 Performance Evaluation. The 'Signature' section is highlighted, showing the 'Description' field. A blue arrow points from the 'Description' field to the 'Legal Scan' button.

**Signature**

Description

By signing this form, I am certifying that I received my evaluation and understand that my failure to sign will not prohibit the evaluation from becoming official for the performance year.

**NOTICE:** Employees who receive an overall rating of "Unsuccessful" should be aware that their employment is at risk. It is imperative that at-risk employees communicate with their supervisors and take advantage of available resources to improve performance. At-risk employees are advised to review the provisions of Chapter 10 of the Civil Service Rules and should note their right to request an agency review of their "Unsuccessful" performance evaluation rating in accordance with Civil Service Rule 10.10.

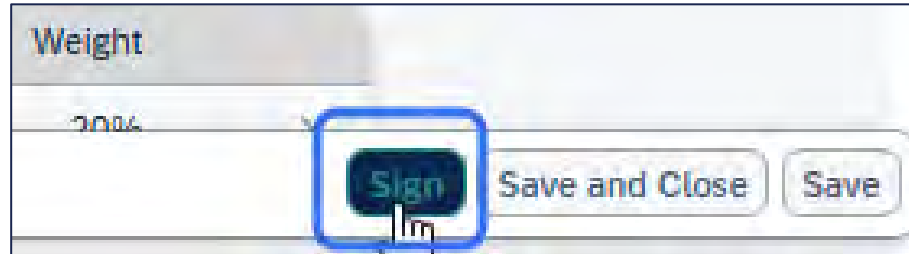
Employee:

I'm proud of the work I completed this year and the progress I made in handling projects more independently. I appreciate the feedback provided and look forward to continuing to strengthen my skills, improve my processes, and contribute to the team's goals.

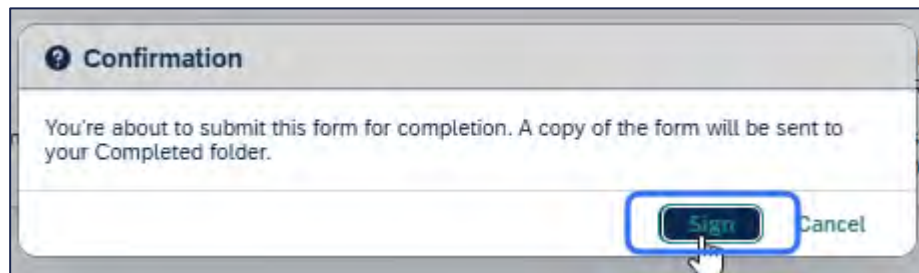
**Legal Scan**

7. Select **Sign** at the bottom right of the screen. You do not have to type your name.

Note: Failure to sign will not prohibit the evaluation from becoming official for the performance year.



8. A confirmation screen will appear. You must select **Sign** again to complete the process.



## ORGANIZING YOUR COMPLETED FORMS

Completed performance management forms will stay in the system for several years, as determined by your agency. You may organize your completed forms to suit your needs and preferences.

Completed performance management forms can be organized within the Performance/My Forms page to make them easier to locate and review later. You can create, rename, or delete custom folders under the Completed category. Supervisors may want to create folders by performance year, employee, or another method that makes sense for their workflow.

1. In My Forms, select **Manage Folders** at the bottom left of the screen.

The screenshot displays the SAP SuccessFactors Performance/My Forms interface. On the left, the 'My Forms' sidebar is visible, with 'Completed' selected. The main content area shows a list of 'Unfiled' forms. A table titled 'Forms (3)' lists the following data:

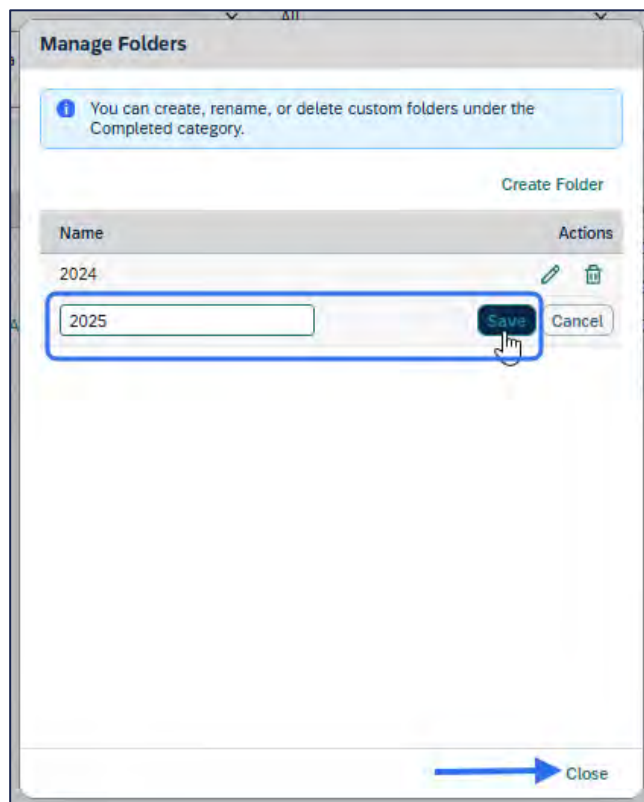
| Title                                                    | Employee         | Form Start Date | Form End Date | Form Due Date | Completed On | Actions |
|----------------------------------------------------------|------------------|-----------------|---------------|---------------|--------------|---------|
| 2025 Performance Planning for ANNE-MARIE DAVIS           | ANNE-MARIE DAVIS | 01/01/2025      | 12/31/2025    | 03/02/2026    | 09/15/2025   | [Icon]  |
| 2025 Performance Planning for NATHAN BARNABA             | NATHAN BARNABA   | 01/01/2025      | 12/31/2025    | 03/02/2026    | 09/19/2025   | [Icon]  |
| 2025 Alternative Performance Planning for NATHAN BARNABA | NATHAN BARNABA   | 01/01/2025      | 12/31/2025    | 10/01/2025    | 09/17/2025   | [Icon]  |

At the bottom left of the screen, a 'Manage Folders' button is highlighted with a blue arrow.

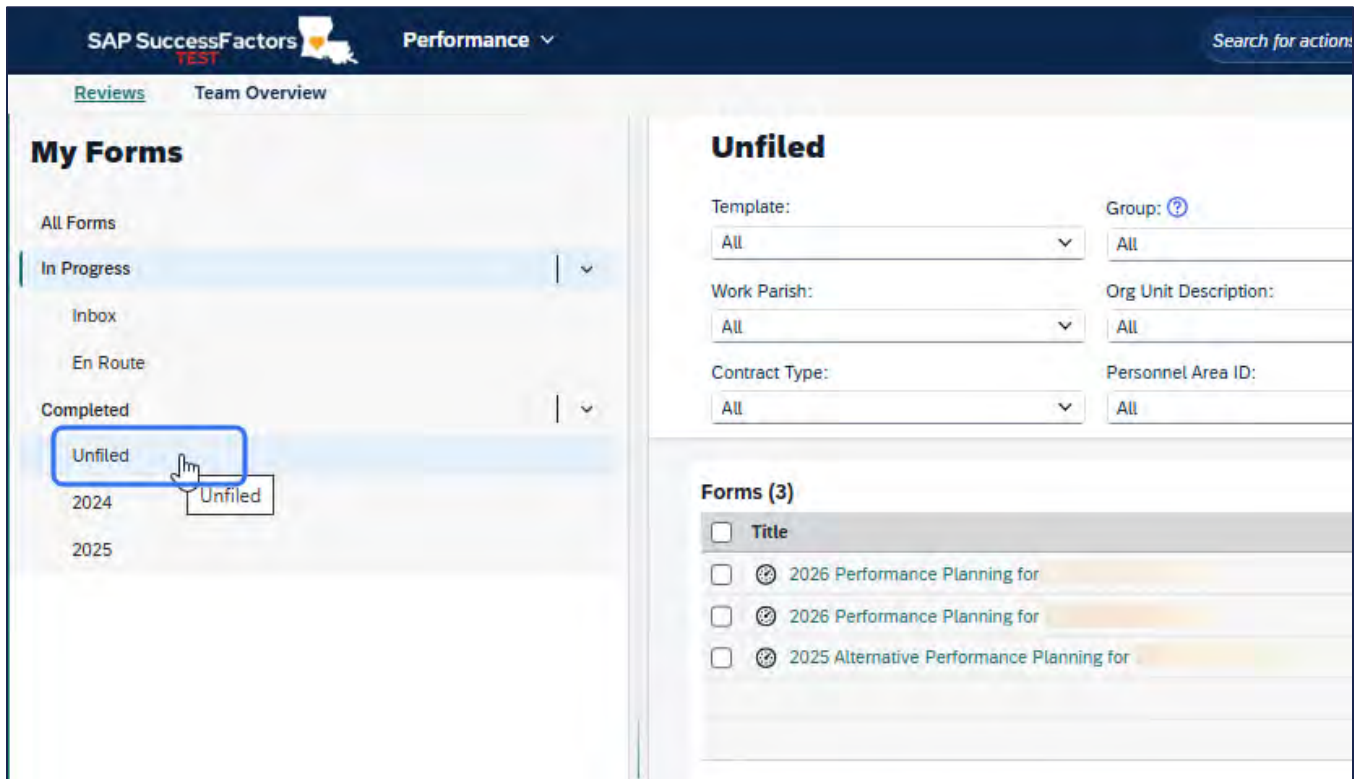
2. Select **Create Folder**.



3. Type the **Folder Name**. Then, select **Save**. After you have created all of the folders needed, select **Close**.



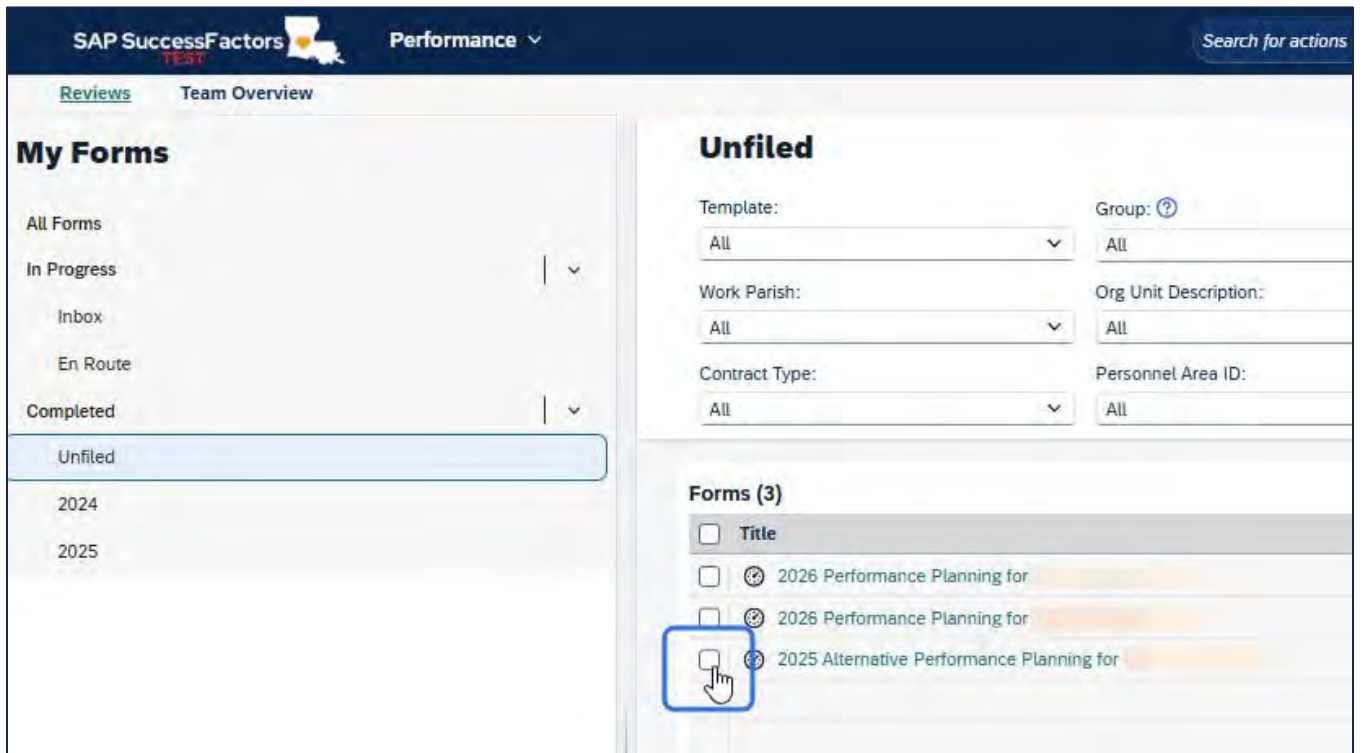
- Select **Unfiled** to see the completed forms that have not been moved to a folder.



The screenshot shows the SAP SuccessFactors Performance interface. On the left, under 'My Forms', the 'Unfiled' filter is selected under the 'Completed' section. On the right, the 'Unfiled' filter is applied, showing a list of forms. The filters on the right include Template: All, Group: All, Work Parish: All, Org Unit Description: All, Contract Type: All, and Personnel Area ID: All. The list of forms shows three items: '2026 Performance Planning for', '2026 Performance Planning for', and '2025 Alternative Performance Planning for'.

- Select the **box next to the form** you want to move.

NOTE: You may select and move multiple documents at once.



The screenshot shows the same SAP SuccessFactors Performance interface. In the 'My Forms' sidebar, the 'Unfiled' filter is still selected. In the 'Forms (3)' list on the right, the checkbox next to the first form, '2026 Performance Planning for', is selected. The filters on the right remain the same as in the previous screenshot.

6. Select **Move to Folder**. Then, use the **drop-down Move to Folder menu** to select the correct folder and move the form.

**Unfiled** Go Reset

Template:  Group:  All or Reports Only:  Employee:  Personnel Area Description:  Organizational Unit:

Work Parish:  Org Unit Description:  Pers Admin:  Position:  EE Sub Grp:  Position Start Date:

Contract Type:  Personnel Area ID:

**Forms (3)**

| <input type="checkbox"/>            | Title                                     | Employee | Form Start D... | Form End Date | Form Due... | Completed On | Actions |
|-------------------------------------|-------------------------------------------|----------|-----------------|---------------|-------------|--------------|---------|
| <input type="checkbox"/>            | 2026 Performance Planning for             |          | 01/01/2026      | 12/31/2026    | 03/02/2026  | 09/16/2026   |         |
| <input type="checkbox"/>            | 2026 Performance Planning for             |          | 01/01/2026      | 12/31/2026    | 03/02/2026  | 09/18/2026   |         |
| <input checked="" type="checkbox"/> | 2025 Alternative Performance Planning for |          | 01/01/2025      | 12/31/2025    | 10/01/2026  | 09/17/2026   |         |

**Move to Folder**

- 2024
- 2025

## REPORTS

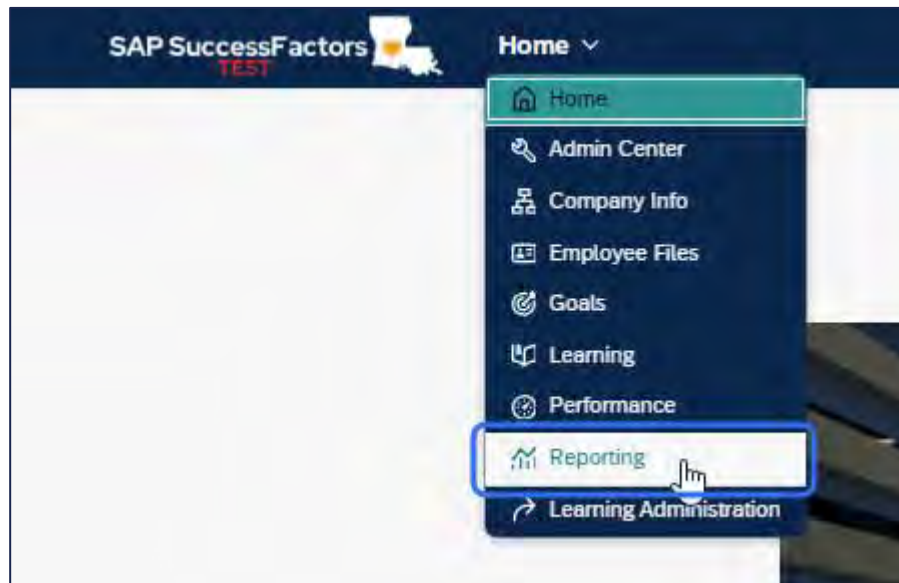
Supervisors can use **Performance Form Status reports** to review the status of both Performance Planning and Performance Evaluation Forms. These reports show launched forms and where each form is currently located in the process.

For the quickest way to check the status of forms for direct reports, supervisors should first use **Team Overview**. Team Overview provides an at-a-glance view of employees and their current forms without requiring a report to be run.

Performance Form Status reports are especially useful when supervisors have a large number of employees or need a more detailed or exportable view of form status.

### PERFORMANCE FORM STATUS REPORTS

1. Select **Reporting** in the **Home** menu.

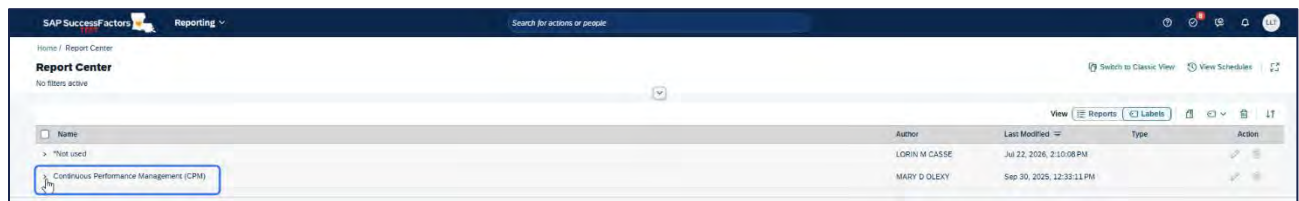


2. To organize your reports, select the **Labels** view at the top of the screen.

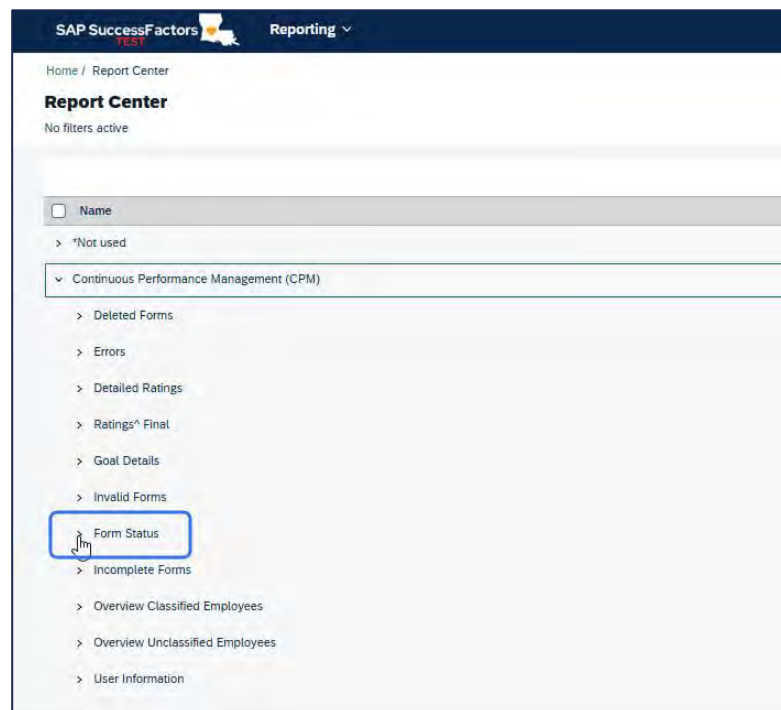
**NOTE:** Your role and security rights may limit the reports you can run.



### 3. Select Continuous Performance Management.



### 4. Select Form Status.

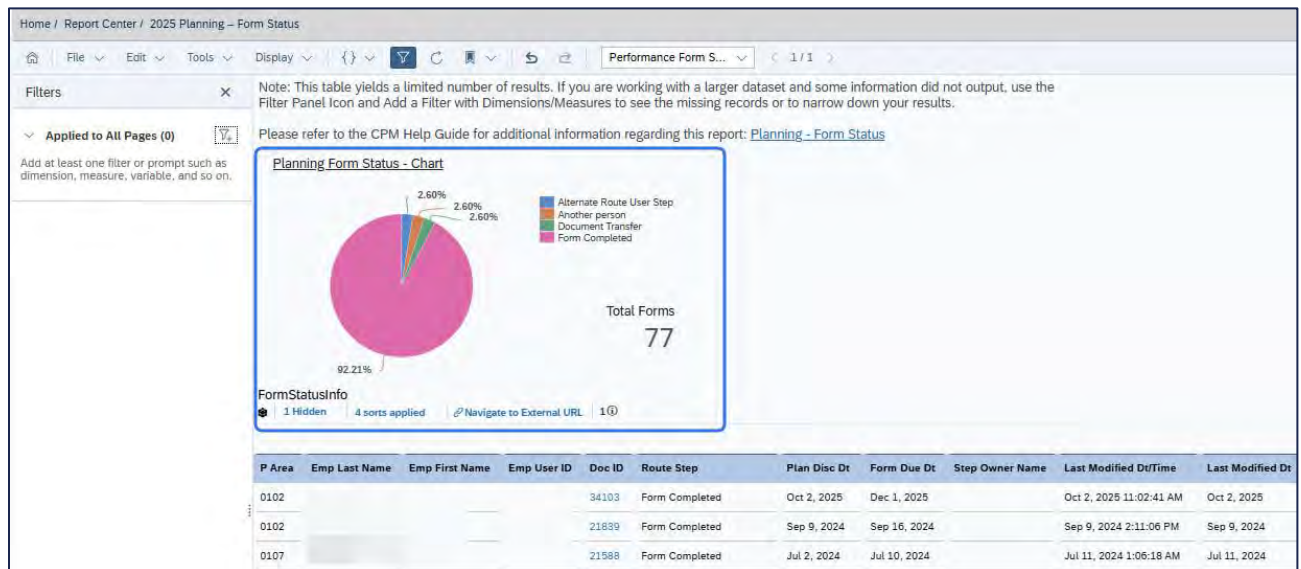


### 5. Select the link for the report you want to run. This example will use **2025 Planning Form Status**. If you select the **box next to the report name**, you will need to select the **3 dots** on the right and select **Run**.



6. A pie chart displays at the top of the report breaking down the route step name by type.

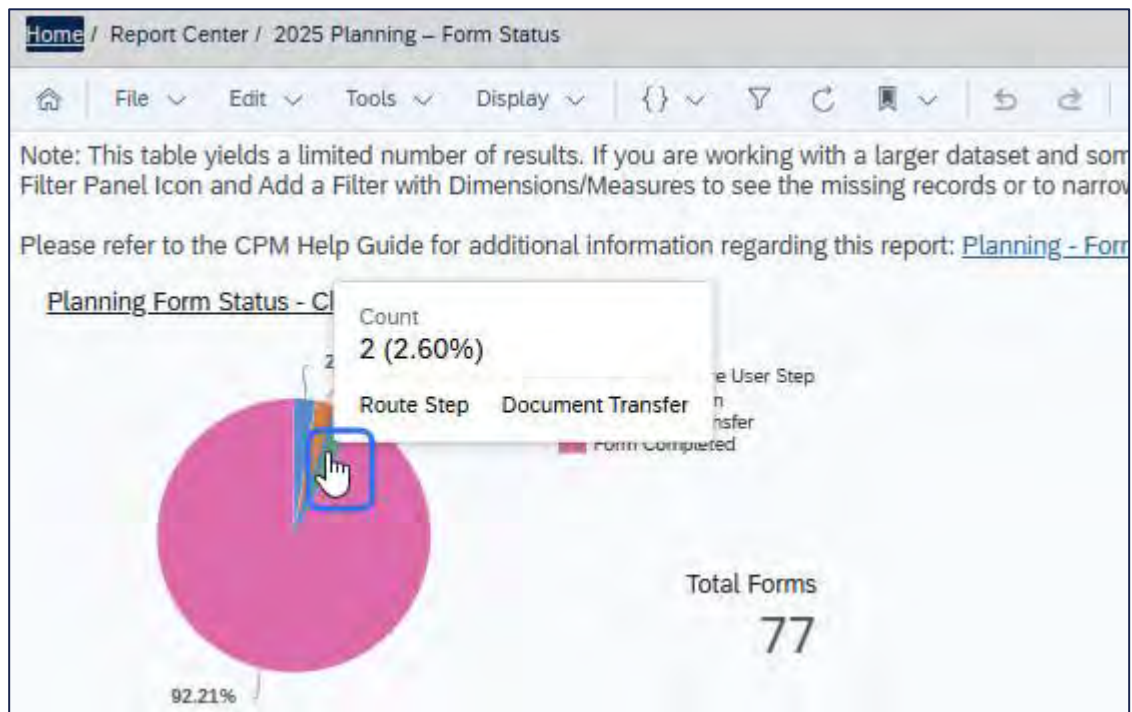
NOTE: Sections appear in alphabetical order based on rating description text including **Employee Signature, Form Completed, Initial Planning: 2nd Level Evaluator, Initial Planning: Supervisor, and Planning Discussion.**



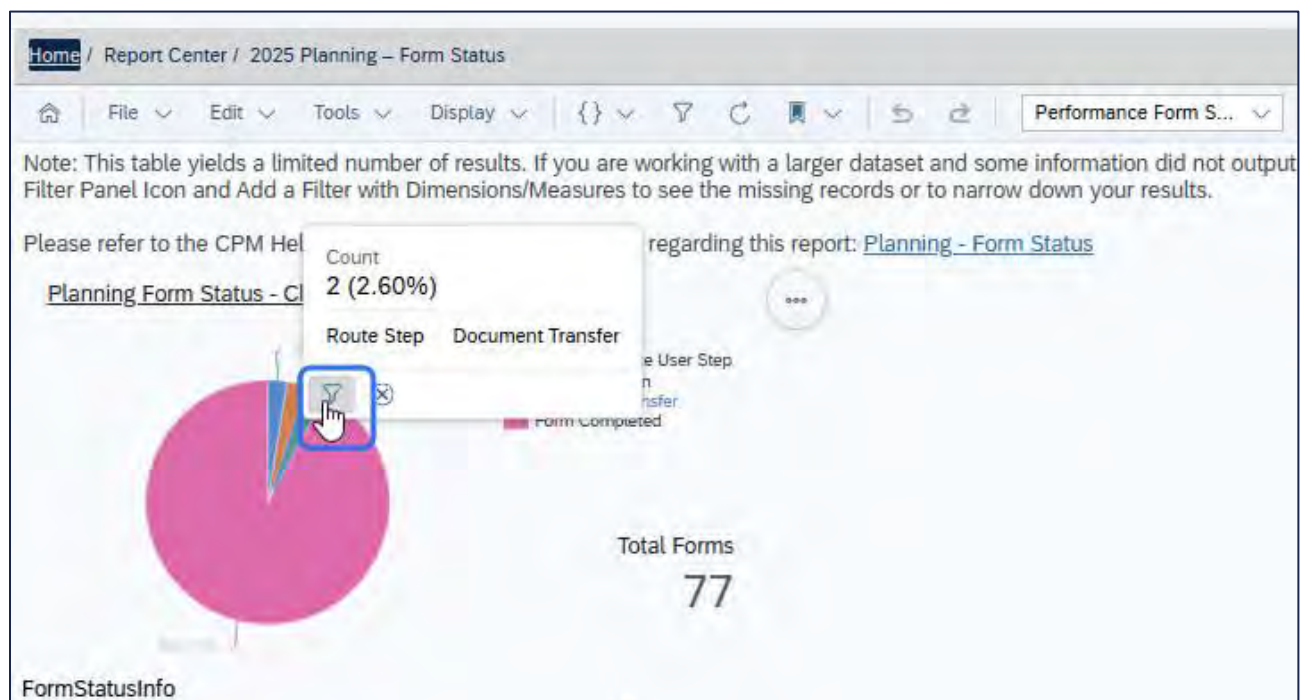
7. This table contains the data used to populate the pie chart. Each row represents an employee's form and includes the employee's name, User ID, Form ID, and current **Route Step**. Use **Route Step** to determine whether the form is complete or still in progress. For forms that are still in progress, use **Step Owner Name** to see who currently has the form and **Last Modified Dt/Time** to see when it was last updated.

| P Area | Emp Last Name | Emp First Name | Emp User ID | Doc ID | Route Step     | Plan Disc Dt | Form Due Dt  | Step Owner Name | Last Modified Dt/Time   | Last Modified Dt | Last Routed On Dt | Current Owner Email | Supv Email      | Emp Email       |
|--------|---------------|----------------|-------------|--------|----------------|--------------|--------------|-----------------|-------------------------|------------------|-------------------|---------------------|-----------------|-----------------|
| 0102   |               |                |             | 34103  | Form Completed | Oct 2, 2025  | Dec 1, 2025  |                 | Oct 2, 2025 11:02:41 AM | Oct 2, 2025      | Oct 2, 2025       | (Null)              | NO-REPLY@LA.GOV | NO-REPLY@LA.GOV |
| 0102   |               |                |             | 21839  | Form Completed | Sep 9, 2024  | Sep 16, 2024 |                 | Sep 9, 2024 2:11:06 PM  | Sep 9, 2024      | Sep 9, 2024       | (Null)              | NO-REPLY@LA.GOV | NO-REPLY@LA.GOV |
| 0107   |               |                |             | 21588  | Form Completed | Jul 2, 2024  | Jul 10, 2024 |                 | Jul 11, 2024 1:06:18 AM | Jul 11, 2024     | Jul 11, 2024      | (Null)              | NO-REPLY@LA.GOV | NO-REPLY@LA.GOV |
| 0107   |               |                |             | 21700  | Form Completed | Jul 30, 2024 | Aug 5, 2024  |                 | Jul 29, 2024 2:58:04 PM | Jul 29, 2024     | Jul 29, 2024      | (Null)              | NO-REPLY@LA.GOV | NO-REPLY@LA.GOV |
| 0107   |               |                |             | 30513  | Form Completed | Mar 10, 2025 | Mar 27, 2025 |                 | Mar 10, 2025 8:45:30 AM | Mar 10, 2025     | Mar 10, 2025      | (Null)              | NO-REPLY@LA.GOV | NO-REPLY@LA.GOV |

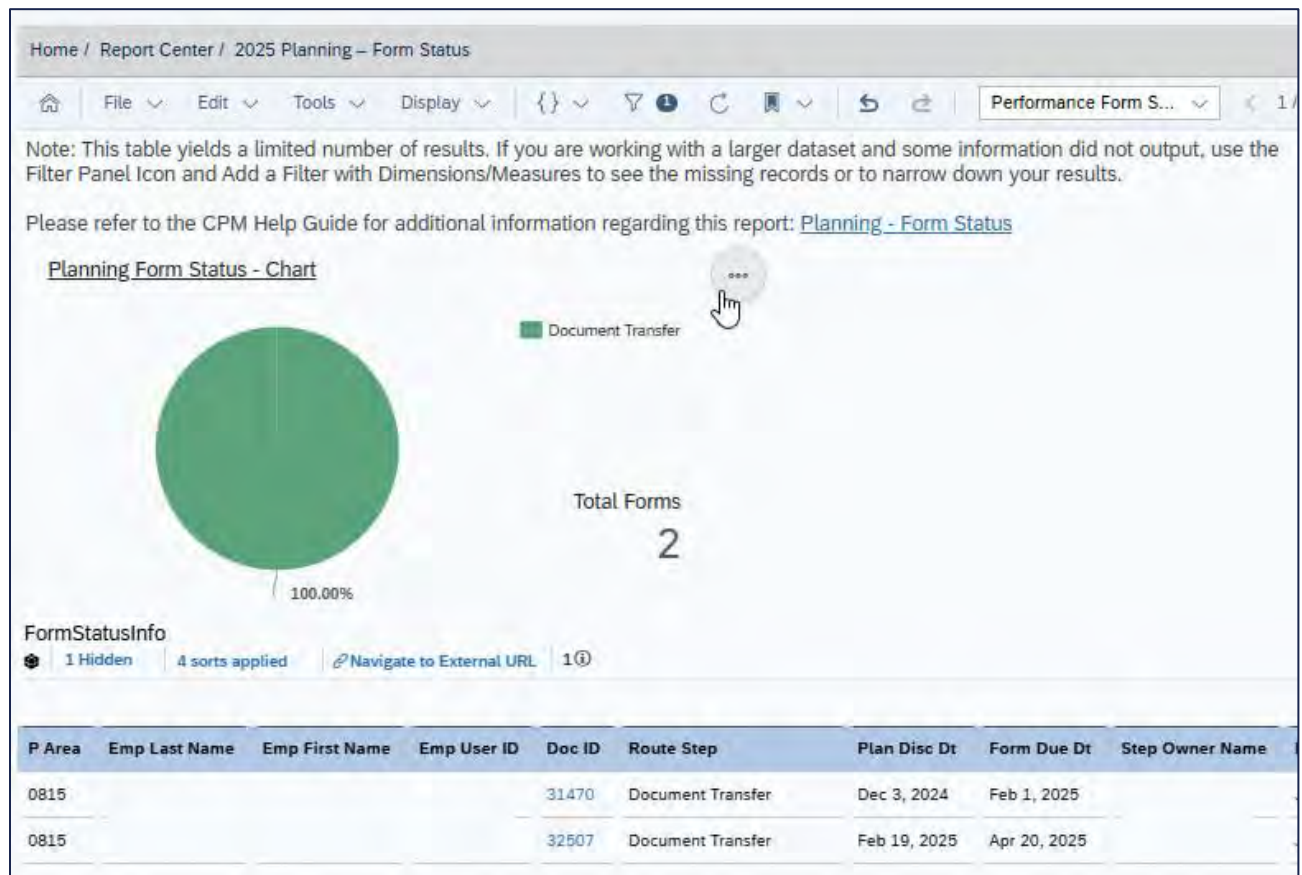
8. To see a list of employees whose forms are in a specific route step, hover over the **pie chart slice** for that route step. This opens an information card.



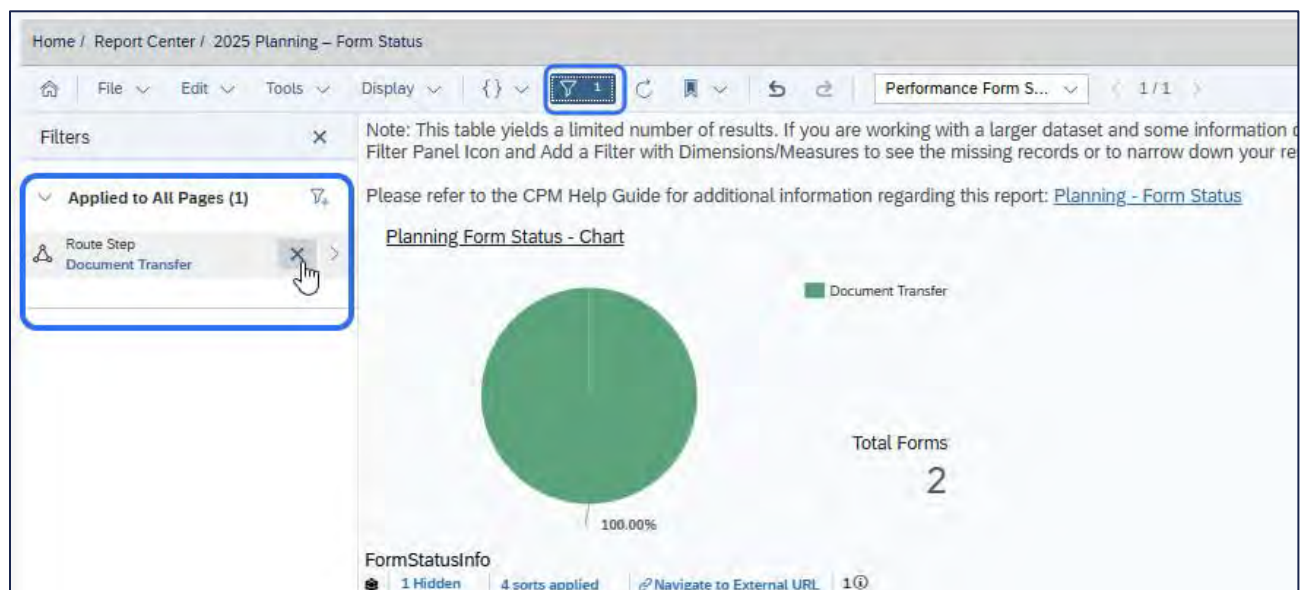
9. Select the **pie chart slice** for the Route Step you want to review. When the data pop-up appears, select the **filter icon** to filter the report results to the forms represented by that slice.



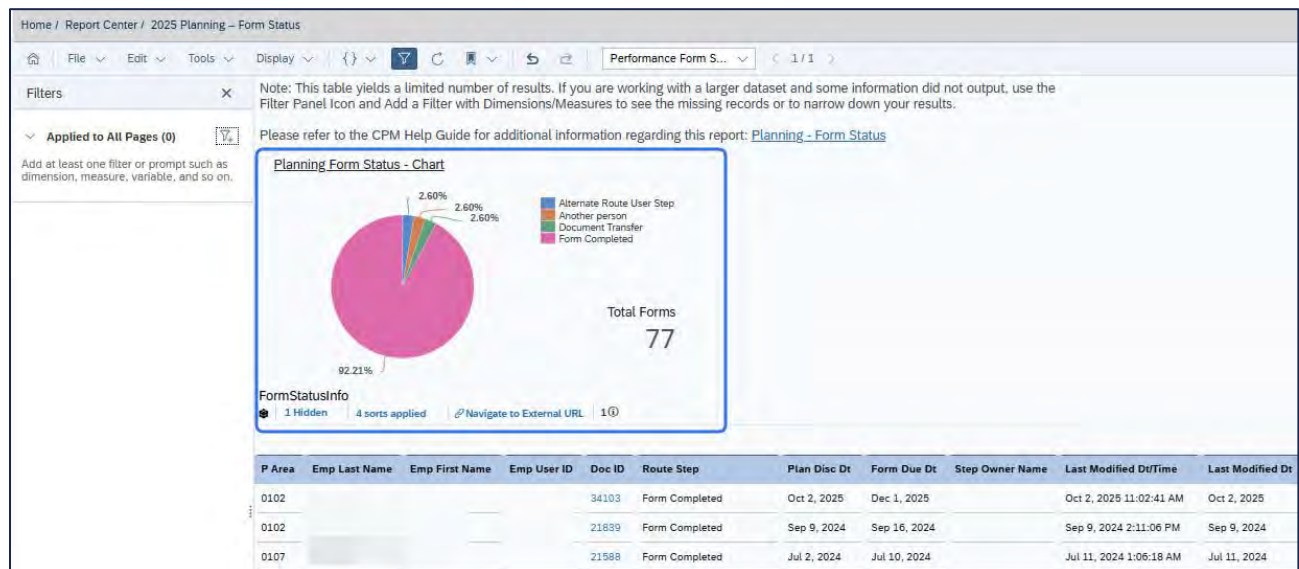
10. The report now displays only the employees who are in this route step.



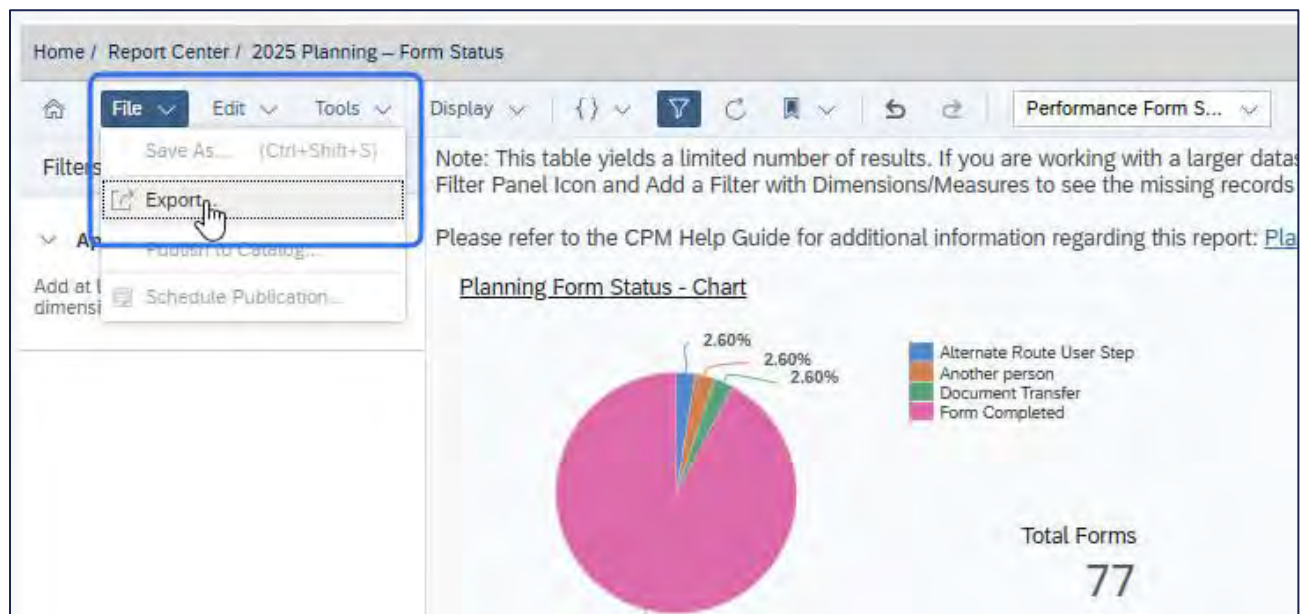
11. To change the filter or remove it, select the **filter icon at the top of the screen**. This opens a filter panel on the left. Select the **X** to remove the filter.



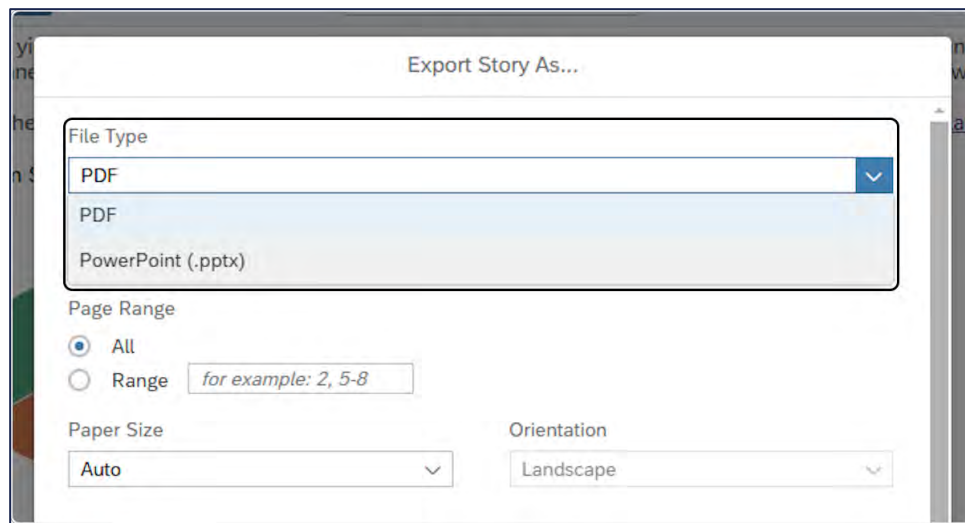
12. From here, repeat steps 8-11 to review a different route step.



13. To export the report, select **File**. Then, select **Export**.



14. Select the desired **File Type**. You can export either as a PDF or PowerPoint.



15. Adjust the **Page Details** as desired. Then, select **Export**.

NOTE: The file is automatically downloaded per your default settings.

