SAP SuccessFactors

Supervisor: How to Document the Planning Discussion

1 NAVIGATE TO THE PLANNING FORM

- From the Home drop-down, click "Performance."
- From the Inbox, open the correct form.

2 SELECT DATE

Select "Date of Planning Discussion."

! The planning discussion should be documented on the same day it is conducted. Backdating or advance dating may result in an audit finding.
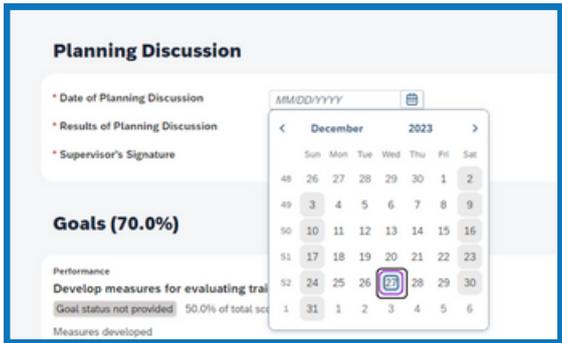
3 SELECT RESULTS

- Click "Results of Planning Discussion" from drop-down.
- 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.
- Use "Employee Refused to Acknowledge Planning." this when you have met with your employee and the employee says they will not sign the planning form.
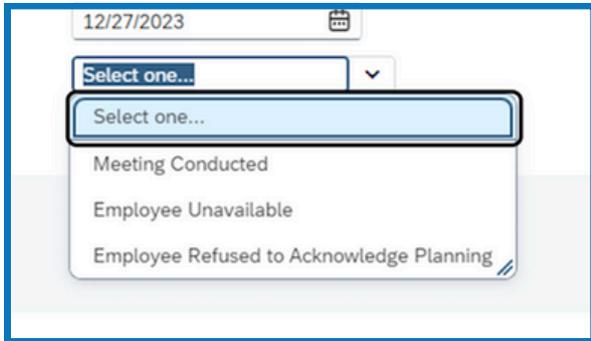
4 SIGN THE FORM

- Type your name in the "Supervisor's Signature" field.
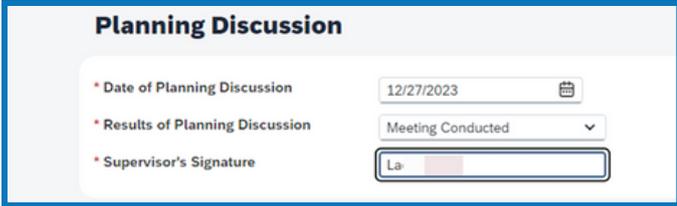
5 ACKNOWLEDGE & CONFIRM

- Scroll to the bottom of the form.
- Click "Acknowledge Planning Discussion and Send to Employee."
- 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.

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