

SAP SuccessFactors

NAVIGATE TO THE PLANNING FORM

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

SELECT DATE

Select "Date of Planning Discussion."

Date of Planning Discussion	MM	ppm	m			曲		
* Results of Planning Discussion	<	De	cemb	er		2023		>
* Supervisor's Signature		Sun	Mon	Tue	Wed	Thu	Pri	Sat
	48	26	27	28	29	30	1	2
	49	3	4	5	6	7	8	9
Goals (70.0%)	50	10	11	12	13	14	15	16
	51	17	18	19	20	21	22	23
Performance Develop measures for evaluating trai	52	24	25	26		28	29	30
Goal status not provided 50.0% of total scr	1	31	1	2	3	4	5	6

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

SELECT RESULTS

3

5

- Click "Results of Planning Discussion" from dropdown.
- 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.

SIGN THE FORM

• Type your name in the "Supervisor's Signature" field.

Select one	
Meeting Conducted	
Employee Unavailable	•
Employee Refused to	Acknowledge Planning

Planning Discussion

12/27/2023

* Date of Planning Discussion	12/27/2023			
* Results of Planning Discussion	Meeting Conducted	~		
* Supervisor's Signature	La			

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.

Acknowledge Planning Discussion and Send to Employee

You're about to route this form to another person to gather signatures. This form is sent in read-only format, and goes to your recipient's Inbox. A copy of the form is also sent to your En Route folder.

