SAP SuccessFactors

Planning Process: 2nd Level Evaluator 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.

1 NAVIGATE TO FORM

You can find your form either by:
- Clicking on "Performance" in the Home menu. Open the correct CPM form in your inbox.
- On the dashboard, in the "For you Today" section, you will see forms to review. Click "Go to Form."
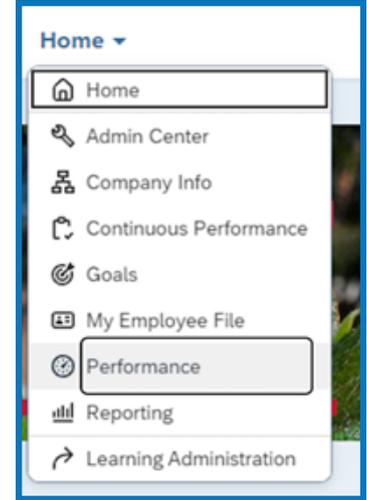
2 REVIEW GOALS

- Click "Goals" or scroll down to the "Goals" section of the form to review the goals created for the employee.
- While the system requires a minimum of 3 goals for the form to be routed, it does not analyze the goal category. You must manually check the goals to ensure that there are at least 2 performance-based goals and 1 behavior-based goal in the planning.
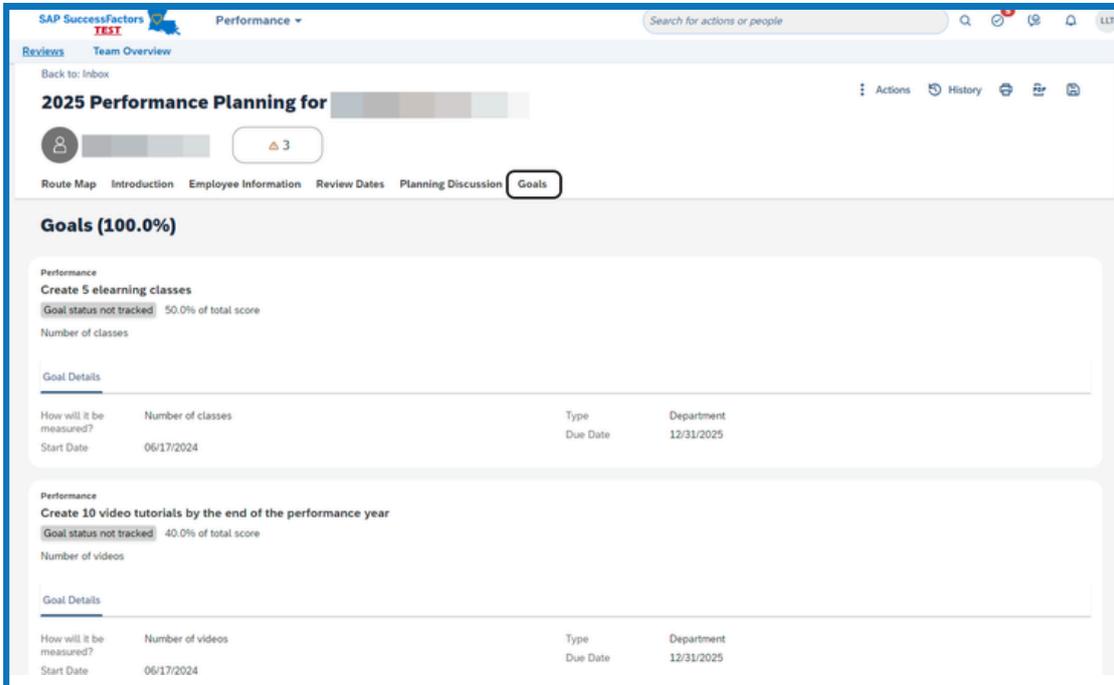
> **!** When reviewing goals, consider these questions:
> - Do the goals for this employee align with organizational goals?
> - Do the goals for this employee align with the employee's position description?
> - Are the goals for this employee SMART (Specific - Measurable - Attainable - Relevant - Time-bound)?

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4 APPROVAL

- If you do **NOT** approve of the planning form, click "Save Back to Evaluating Supervisor."
- The next screen asks you to confirm your selection. You must click on "Send Back to Evaluating Supervisor" again for the form to be returned.

- If you **DO** approve of the planning form, click "Save and Send to Planning Discussion."
- The next screen asks you to confirm your selection. You must click on "Send to Planning Discussion" again for the form to be returned.

| Cancel | Save and Close | Send Back to Evaluating Supervisor | Save and Send to |

| Save and Send to Planning Discussion | Send and Open Next |
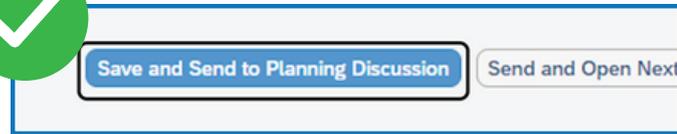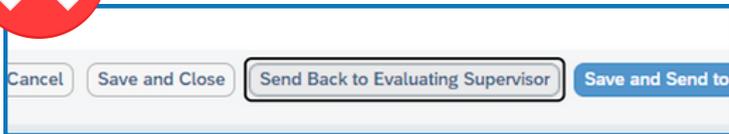
Once you approve the form, several actions occur:
- The form is sent to BOTH the supervisor and employee simultaneously.
- The state of the Goal Plan changes to APPROVED. Goals cannot be added, edited, or deleted.