

# SAP SUCCESSFACTORS ENCYCLOPEDIA for Supervisors

**SAP SuccessFactors**



# Table of Contents

Welcome Message .....	5
SCS Chapter 10 Overview.....	6
About this Guide .....	7
Navigating your Dashboard .....	8
Dashboard Basics .....	8
Navigation Basics .....	8
Using the My Team Quick Action Tile .....	9
Viewing and Creating Reminders.....	11
Tile Reports .....	18
Using Favorites.....	20
Mobile Activation.....	22
How to Change your Settings.....	25
Performance Management Basics .....	30
Performance Management Calendar .....	30
Continuous Performance Management Process Overview.....	31
CPM Planning.....	32
Goals .....	33
Goal Fields.....	34
Goal Status: Unapproved vs Approved .....	36
How to Access a Goal Plan .....	39
Adding Goals .....	42
Options for Creating Goals.....	44
How to Create a Personal Goal.....	45
How to Create a Library Goal.....	54
How to Use the Goal Wizard.....	60
Copying Goals from Previous Goal Plan.....	67
Cascading Goals to Employees.....	69
Using Comments in Goal Plans .....	75
Updating Goals in the Goal Plan .....	76
Working in the Goal Plan .....	77
Performance Management.....	79
Performance Management Forms .....	79
Navigating your Performance / My Forms Page.....	80
Understanding the Performance Management Form .....	89

The Role of Competencies in Performance Management.....	93
Moving the Form to the 2 <sup>nd</sup> Level Evaluator.....	97
Meeting with your 2 <sup>nd</sup> Level Evaluator .....	98
Planning - 2 <sup>nd</sup> Level Evaluator's Role.....	99
2 <sup>nd</sup> Level Evaluator – Navigating to the Planning Document.....	99
2 <sup>nd</sup> Level Evaluator – Evaluating the Planning Document.....	101
2 <sup>nd</sup> Level Evaluator – Planning Not Approved.....	104
2 <sup>nd</sup> Level Evaluator – Planning Approved.....	105
Route Map Note – After Planning is Approved by 2 <sup>nd</sup> Level Evaluator.....	106
Acknowledging the Planning Form as an Employee .....	107
Conducting the Planning Discussion .....	109
Documenting the Planning Discussion - Supervisor .....	109
CPM Evaluation.....	113
Rating Scale Overview.....	114
Employee Self-Assessment .....	115
Navigating to Form for Self-Assessment.....	116
Saving / Moving Form in Route Map .....	117
Self-Assessment: Goals .....	118
Self-Assessment: Competencies .....	122
Supervisor Evaluation of Employee .....	127
Navigating to the Form for Supervisor Evaluation.....	127
Review Planning and Evaluation Form.....	129
Updating Goals.....	133
Supervisor Evaluation: Goals .....	136
Supervisor Evaluation: Competencies .....	141
Final Evaluation Review .....	149
Saving / Moving Form in Route Map .....	153
2 <sup>nd</sup> Level Evaluator's Role – Evaluation.....	154
2 <sup>nd</sup> Level Evaluator - Navigating to the Evaluation Form .....	154
2 <sup>nd</sup> Level Evaluator – Reviewing Evaluation Form.....	156
Meeting with your 2 <sup>nd</sup> Level Evaluator .....	164
Conducting the Evaluation Discussion .....	165
Documenting the Evaluation Discussion – Supervisor.....	166
Documenting the Evaluation Discussion – Employee Signature .....	170
How to Find and Organize Completed Forms .....	173
Continuous Performance Management .....	178

Continuous Performance Tools .....	178
Using Activities.....	179
Using the Meeting Tool.....	196
Using Achievements.....	217
Performance Improvement Tool .....	223
Continuous Feedback.....	238
Navigating Continuous Feedback.....	238
Responding to Feedback Requests .....	243
Requesting Feedback .....	247
Giving Feedback .....	251
APPENDIX .....	255
SCS Competency Model.....	255
Documentation Best Practices.....	275

## WELCOME MESSAGE

To our PMGM Pioneers:

Thank you for participating in the SuccessFactors PMGM pilot.

State Civil Service (SCS) is excited to partner with the Department of Administration and the Office of Technology Services to bring you a new online Continuous Performance Management System (CPM). This endeavor is the result of years of collaboration, planning, and hard work.

Pilots are a great opportunity for us to learn best practices and identify pain points and bottlenecks in the system. We invite you to collect and share your feedback and experiences with us throughout the pilot so that we can optimize the system for statewide launch.

As we go through the pilot, we would like to point out that not all parts of the system are completely fine-tuned. Competencies, for example, are a meld of the existing SCS Competency library and the Success Factors library. Throughout the next year we will be refining the verbiage and resources for the combined model. In the meantime, while some of the existing resources are spot on, you may find some verbiage in the writing assistant needs polishing.

SCS has prepared tools and resources to guide you in using the PMGM system, the largest of which is this encyclopedia. In this volume, you will find a collection of step-by-step instructions (with pictures) of all of the processes in the PMGM system. We have also created multiple video tutorials and quick guides for specific tasks that can be viewed here through the PMGM Help portal. Should you need assistance that is not available in this tool, we invite you to contact your Agency Administrator or the SCS help hotline.

Thank you again for participating in this pilot and helping us prepare the PMGM system for statewide use. We are excited to move through the pilot with you to refine, prepare, and support the system for statewide roll-out.



# STATECIVILSERVICE

## SCS CHAPTER 10 OVERVIEW

A good performance evaluation system provides a mechanism for an employer to evaluate the talent, skills, and abilities of staff. It also provides an opportunity for the employee and manager to have a one-on-one discussion of expected job performance, where the employee stands and what it takes to get to the next step.

Currently, SCS is reviewing and revising Chapter 10 to align with the new Continuous Performance Management System (CPM) for state classified employees.

This section will be updated when the revised rules have been approved.

---

## ABOUT THIS GUIDE

This comprehensive guide includes information to help you understand and utilize the tools available within the SuccessFactors Performance Management and Goal Management system.

Main sections will begin with the following:

**WHAT** = This section provides an overview of the step or tool in the section.

**WHEN** = This section explains when to use the tool and/or timelines associated with the step/process.

**WHY** = This section discusses the impact of the tool/step.

**SF NOTES** = *This section contains any notes about navigation, impact, or system limitations within SuccessFactors (SF).*

---

Throughout the guide, you will see **ICONS** that note the following:



### IMPORTANT

This symbol indicates crucial information that may impact the process and/or user.



### REQUIRED

This symbol indicates the step is required.



### BEST PRACTICE

This symbol indicates an opportunity to apply a best practice in performance management.



### 2nd LEVEL APPROVAL

This symbol indicates steps in the process that require approval from the 2nd Level Evaluator.

# NAVIGATING YOUR DASHBOARD

## DASHBOARD BASICS

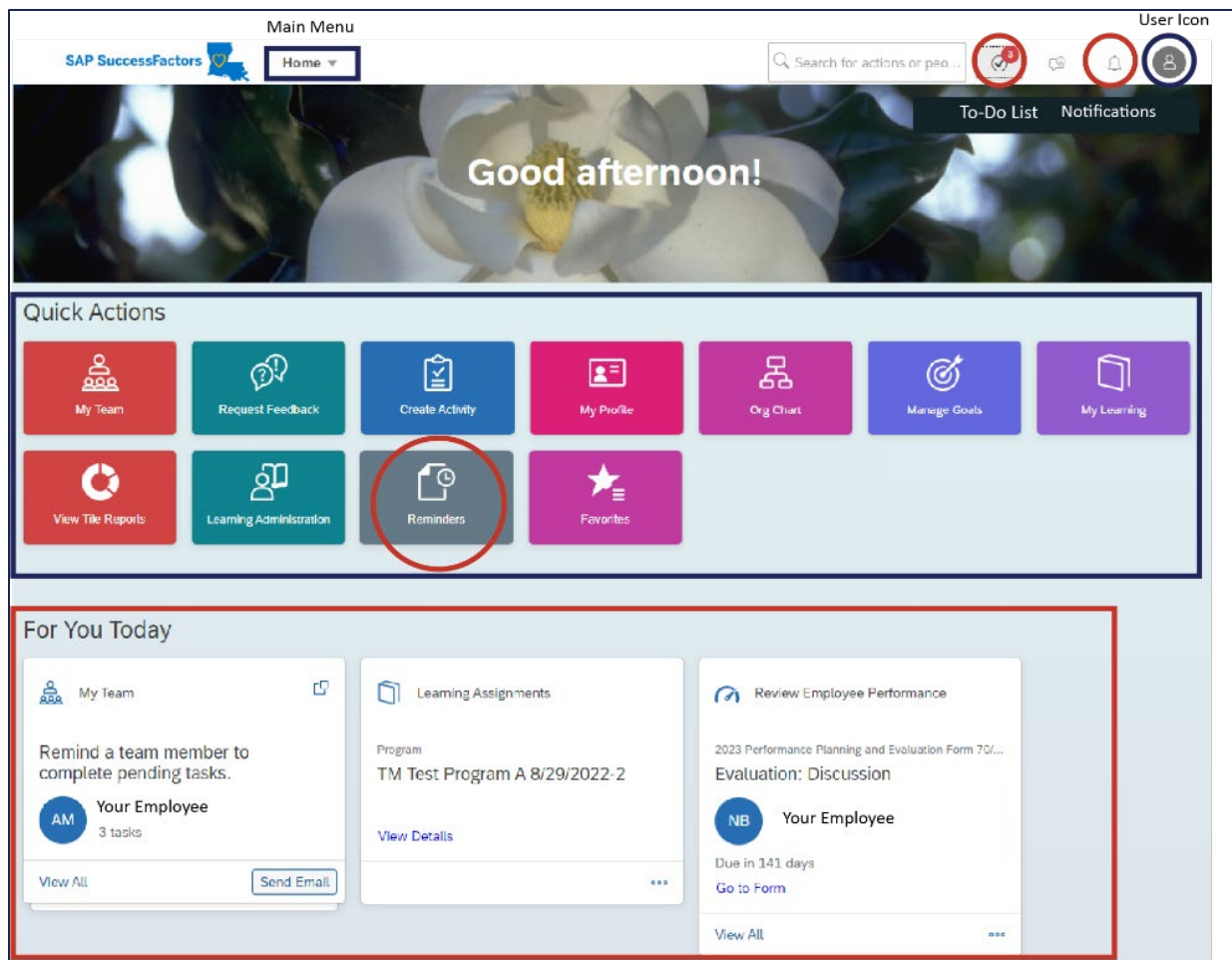
When you log into SuccessFactors (SF), your dashboard will have these features. Note: Tile locations and colors may vary and change.

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** – Clicking here will allow you to see your account information and change your settings.
- **Quick Actions** – These tiles allow you to navigate to specific items in one click.

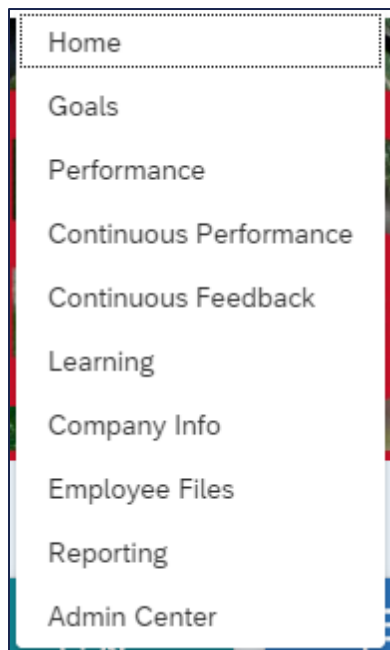
SuccessFactors has multiple tools to notify you of items that may need your attention. These include:

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



## NAVIGATION BASICS

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



**This is the Home menu and the Actions associated with it.**

**Goals** = Create and Manage Goal Plans

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

**Continuous Performance** = Create Activities, Meetings, and Achievements

**Continuous Feedback** = Request, send, and review feedback

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

**Company Info** = Open the Organizational Chart

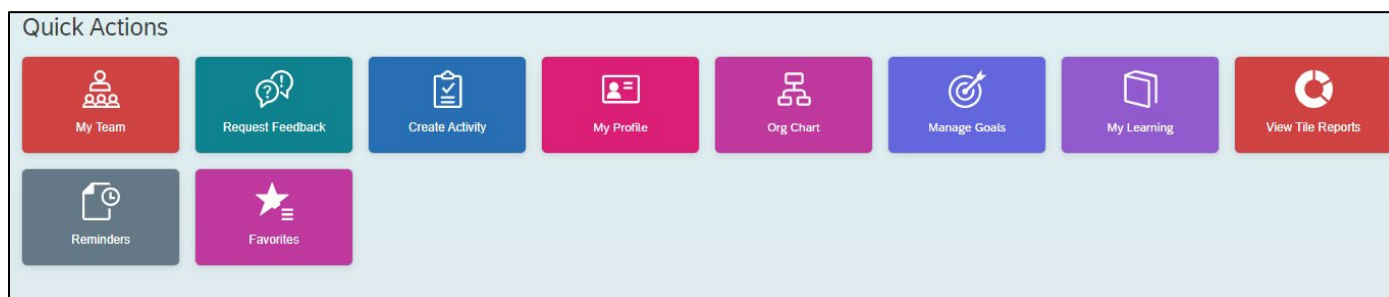
**Employee Files** = Open your Profile

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

**Admin Center** = For Agency Administrators only

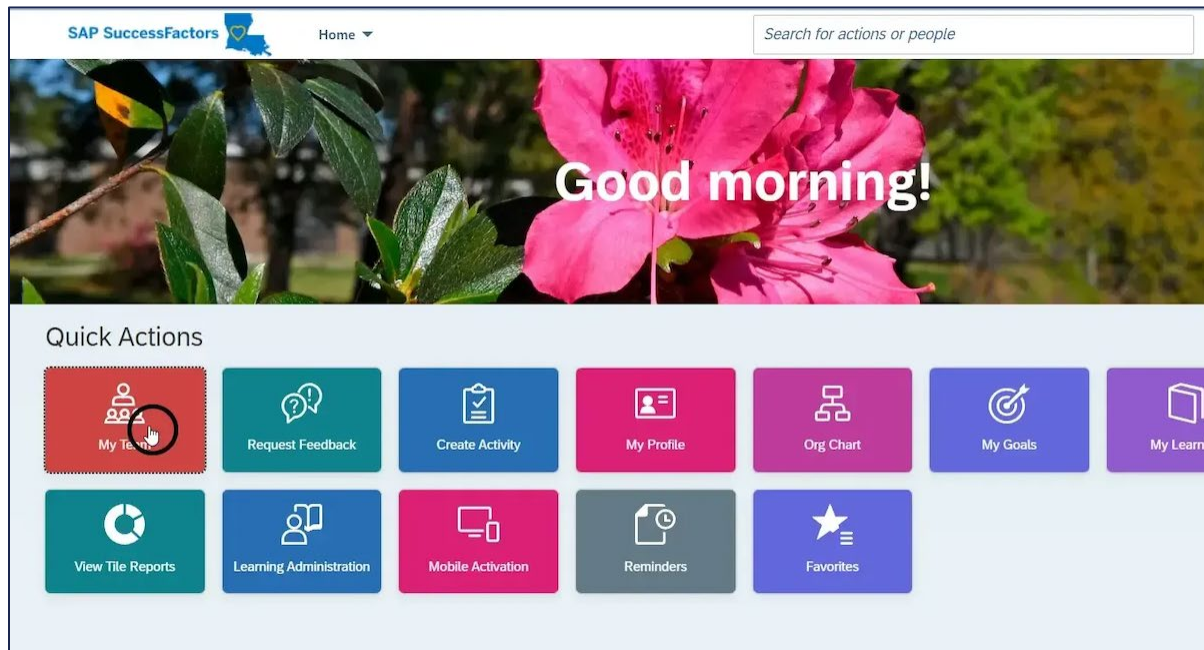
Your Home menu may not have all of the options listed here. Your menu and access rights are based on your roles and responsibilities within your agency.

Many actions can be opened from the Quick Action tiles as well as through the Home menu. The **My Team** tile offers you a shortcut to navigate to actions associated with any of your direct reports. However, certain actions are only available through these tiles, such as **Reminders**, **View Tile Reports**, and **Favorites**.

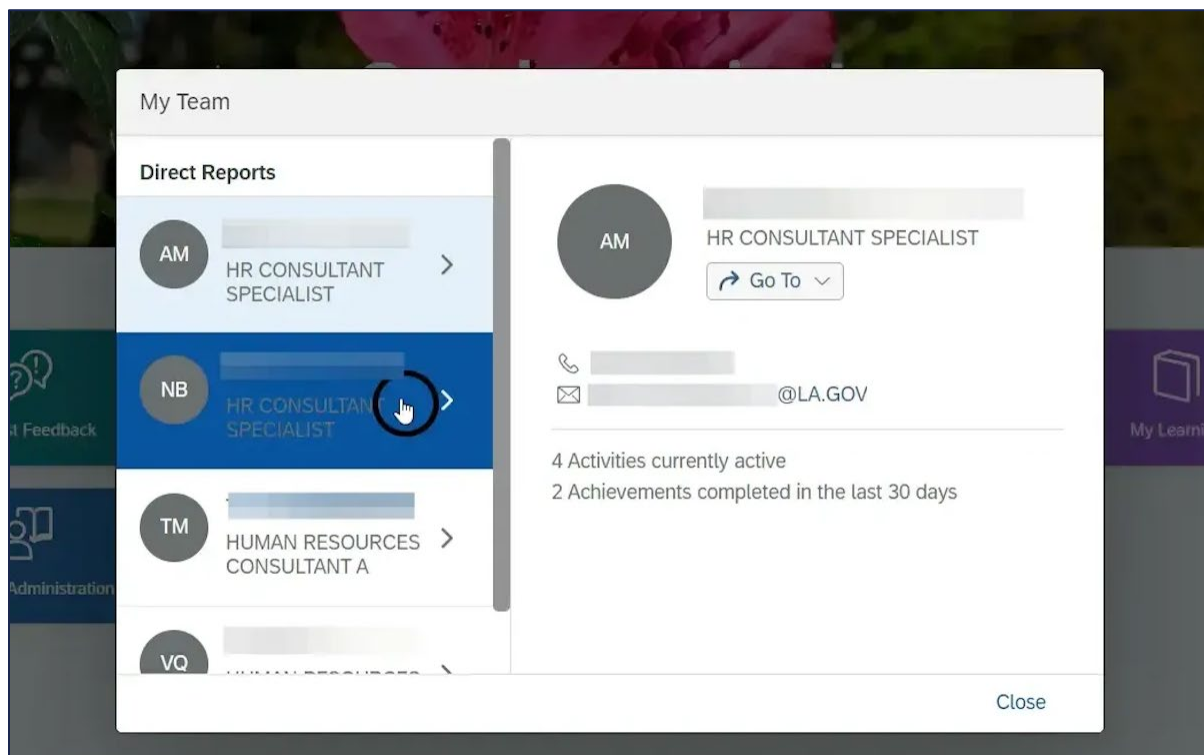


## USING THE MY TEAM QUICK ACTION TILE

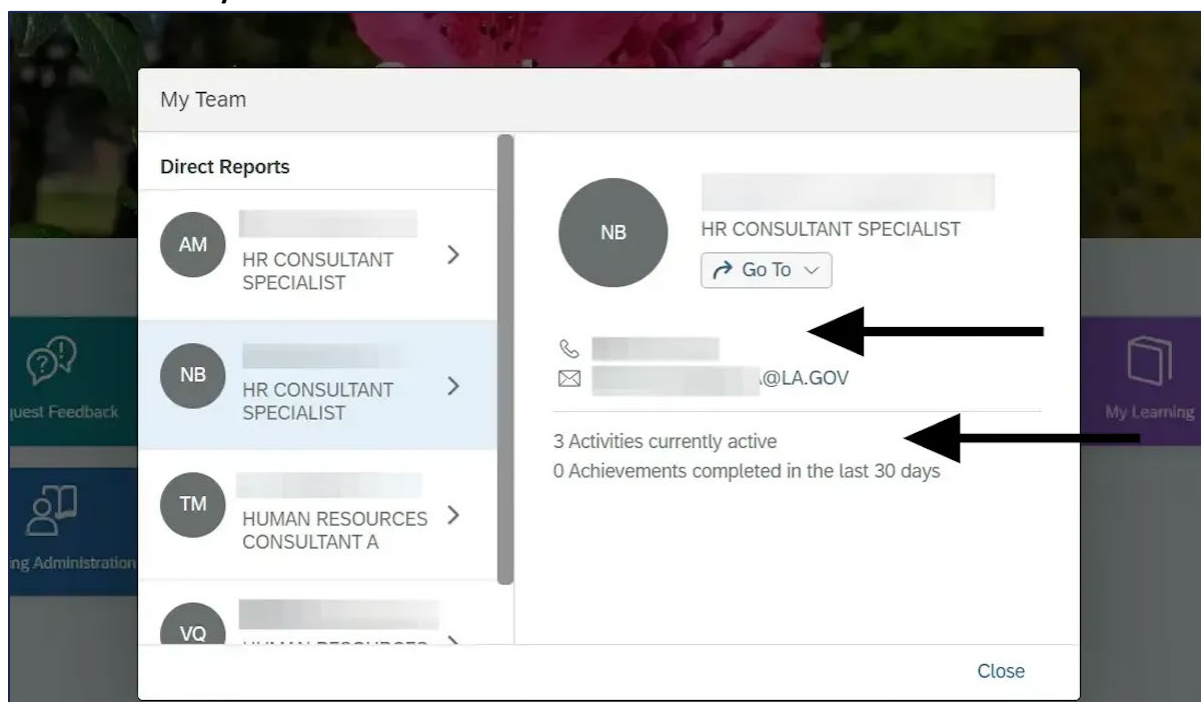
### 1. Click on the "My Team" Quick Actions tile.



### 2. A window with a list of your Direct Reports opens. Click on the employee whose information you want to access.

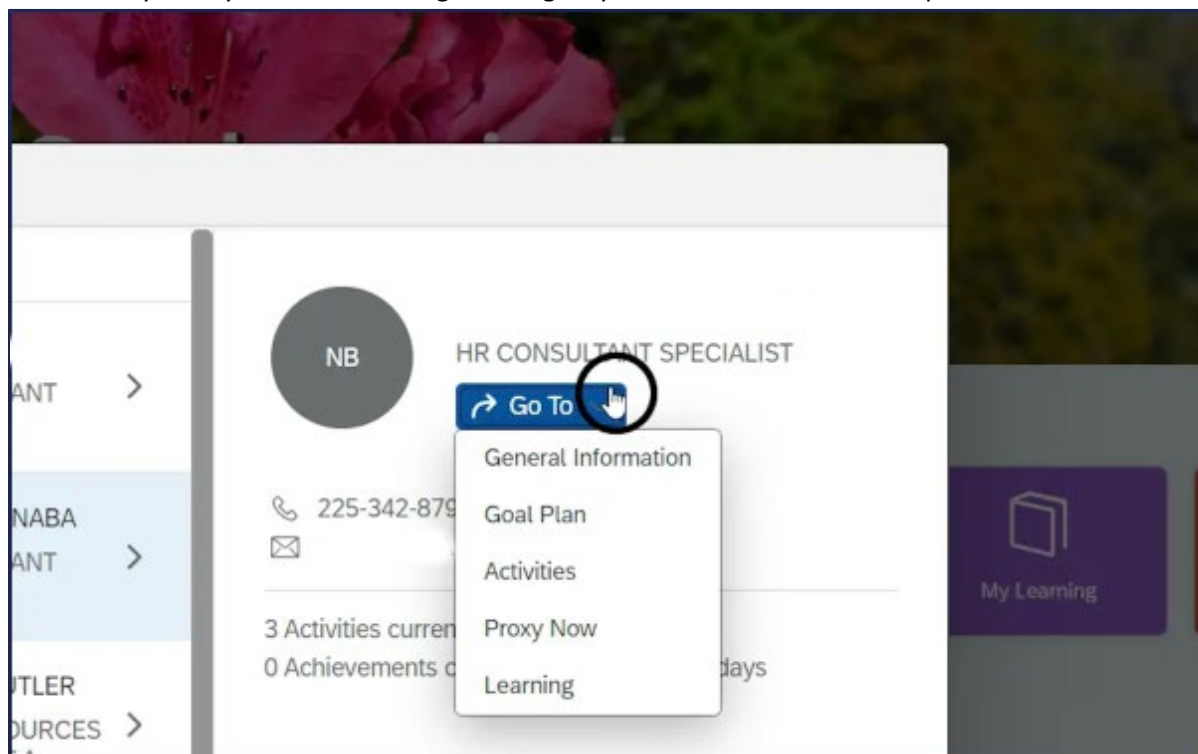


3. For each employee, you can see contact information as well as current Activities and Achievements for the last 30 days.



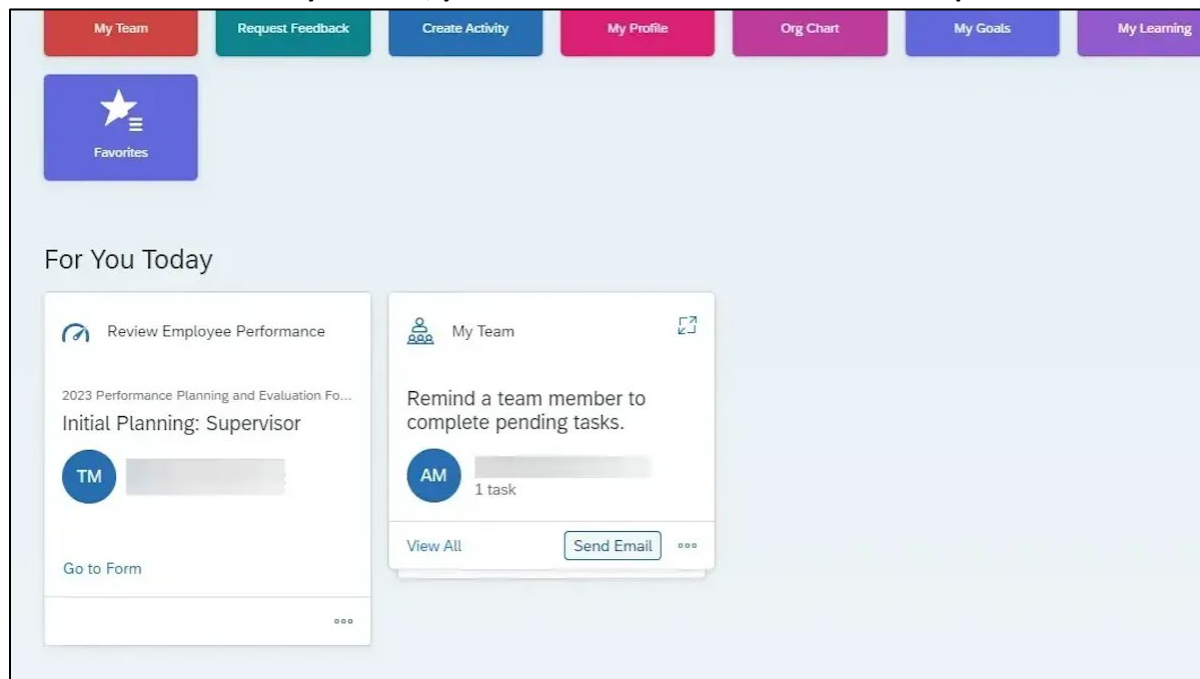
4. Use the "Go To" drop-down menu to view actions associated with this employee. From here, you can navigate to the employee's General Information, Goal Plan, Activities, and Learning.

NOTE: Proxy is only available to designated Agency Administrators and HR Representatives.

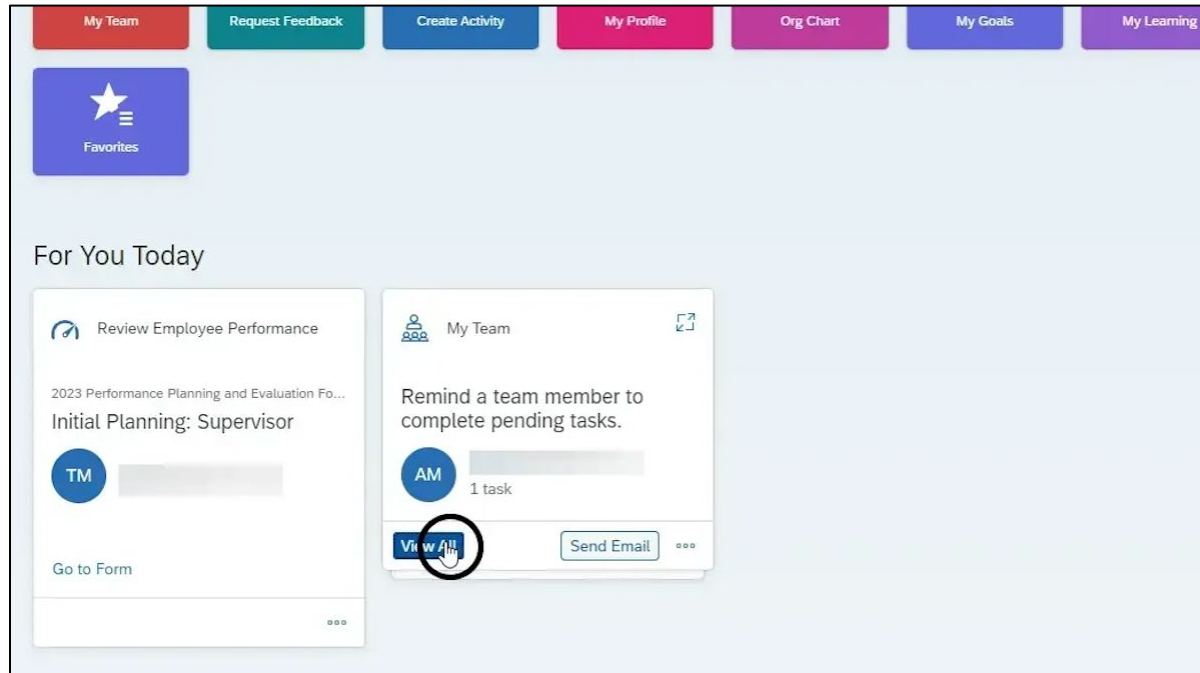


## VIEWING AND CREATING REMINDERS

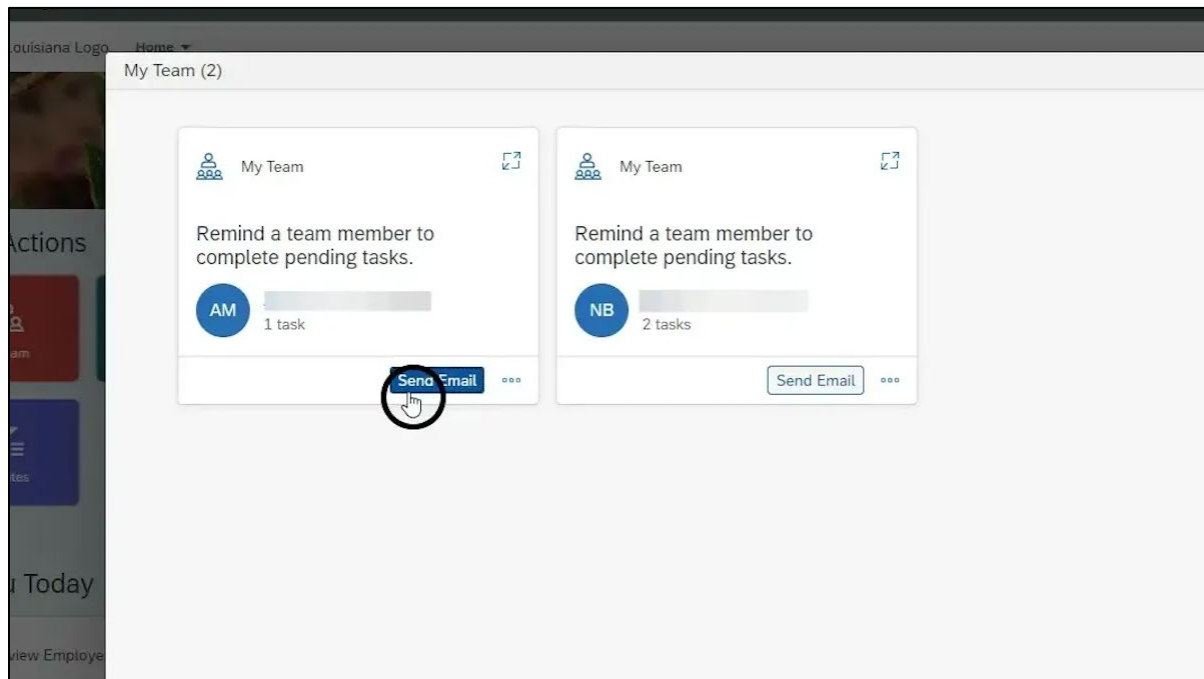
1. In the "For You Today" section, you will see reminders for tasks to be completed.



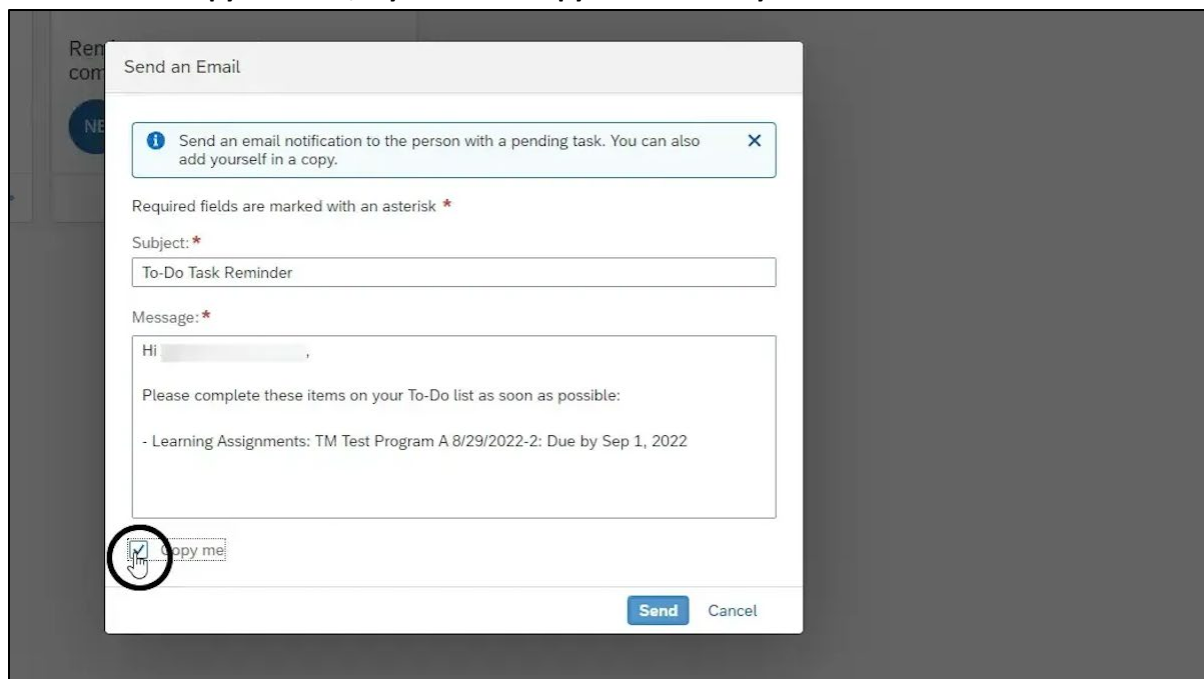
2. Similar tasks will stack on top of each other. Click "View All" to see the reminders in that stack.



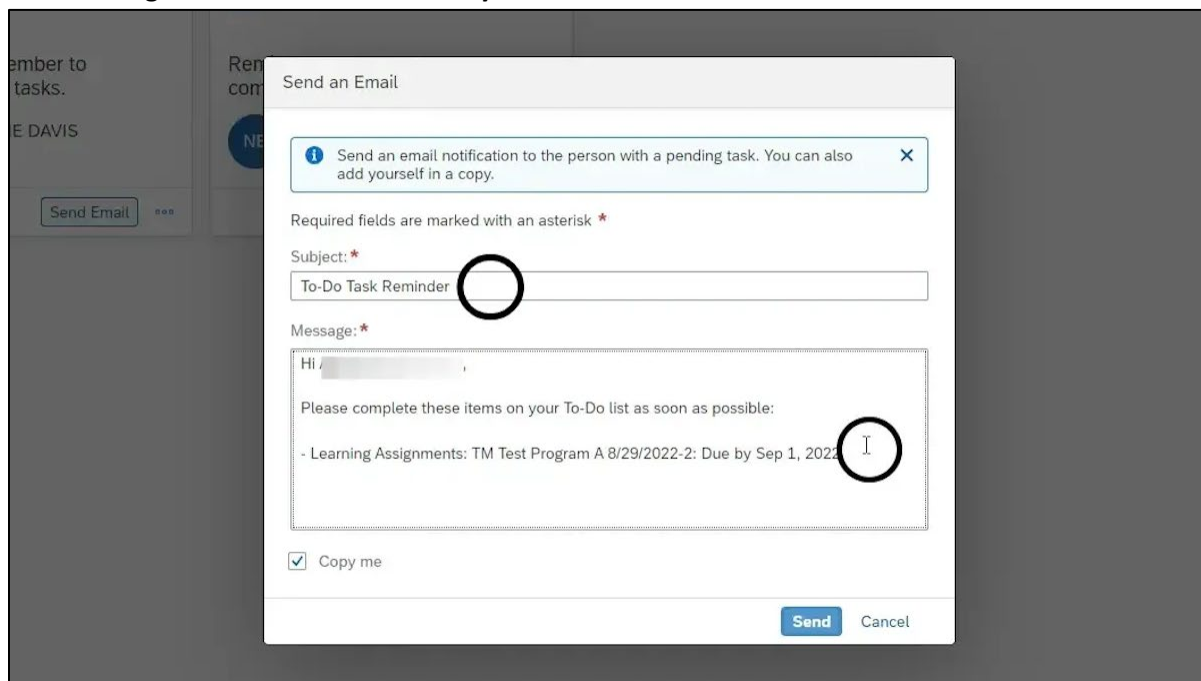
3. For "My Team" reminders, you have two options. First, you can click on "Send Email" to send a notification to your employee.



4. Click the "Copy Me" box, if you want a copy to be sent to you as well.

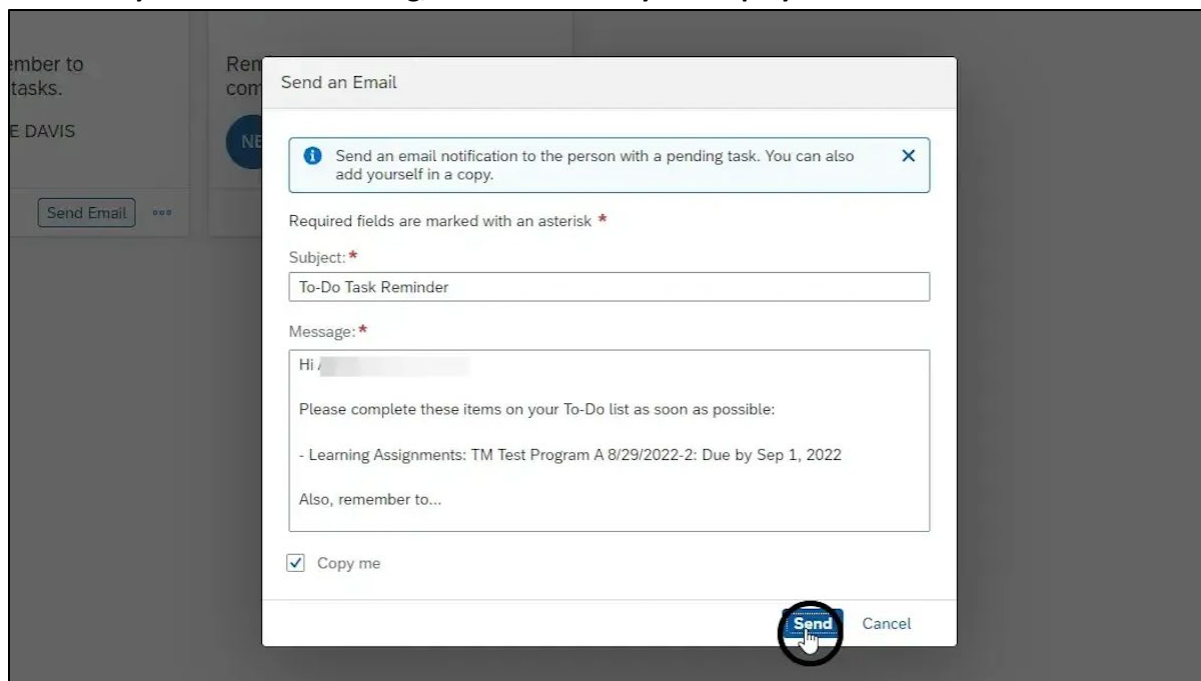


5. You can also edit the email. Click in the "Subject" field to customize the subject. Click anywhere in the "Message" window to edit the body of the email.



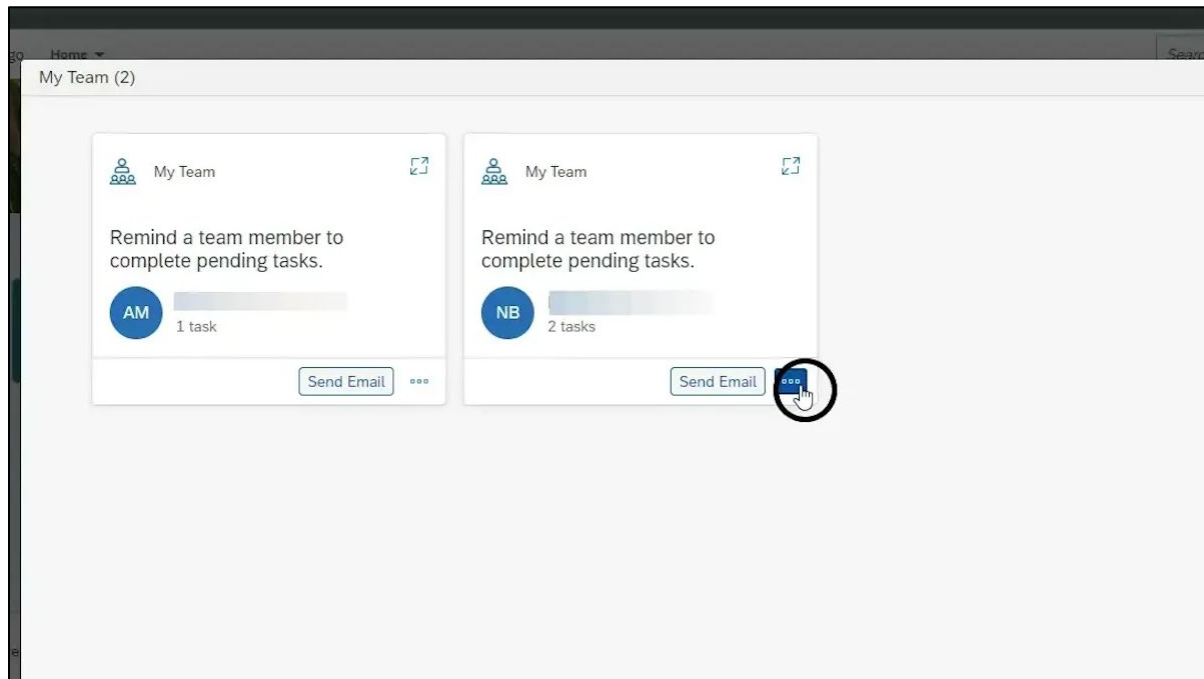
The screenshot shows the 'Send an Email' dialog box. At the top, there is a blue information banner that reads: 'Send an email notification to the person with a pending task. You can also add yourself in a copy.' Below this, a note states 'Required fields are marked with an asterisk \*'. The 'Subject:' field is marked with an asterisk and contains the text 'To-Do Task Reminder'. A black circle is drawn around this field. The 'Message:' field is also marked with an asterisk and contains the text: 'Hi [redacted],  
Please complete these items on your To-Do list as soon as possible:  
- Learning Assignments: TM Test Program A 8/29/2022-2: Due by Sep 1, 2022'. A black circle is drawn around the end of the message text. At the bottom left, there is a checked checkbox labeled 'Copy me'. At the bottom right, there are two buttons: 'Send' (highlighted in blue) and 'Cancel'.

6. When you are finished editing, click "Send" and your employee will be notified.



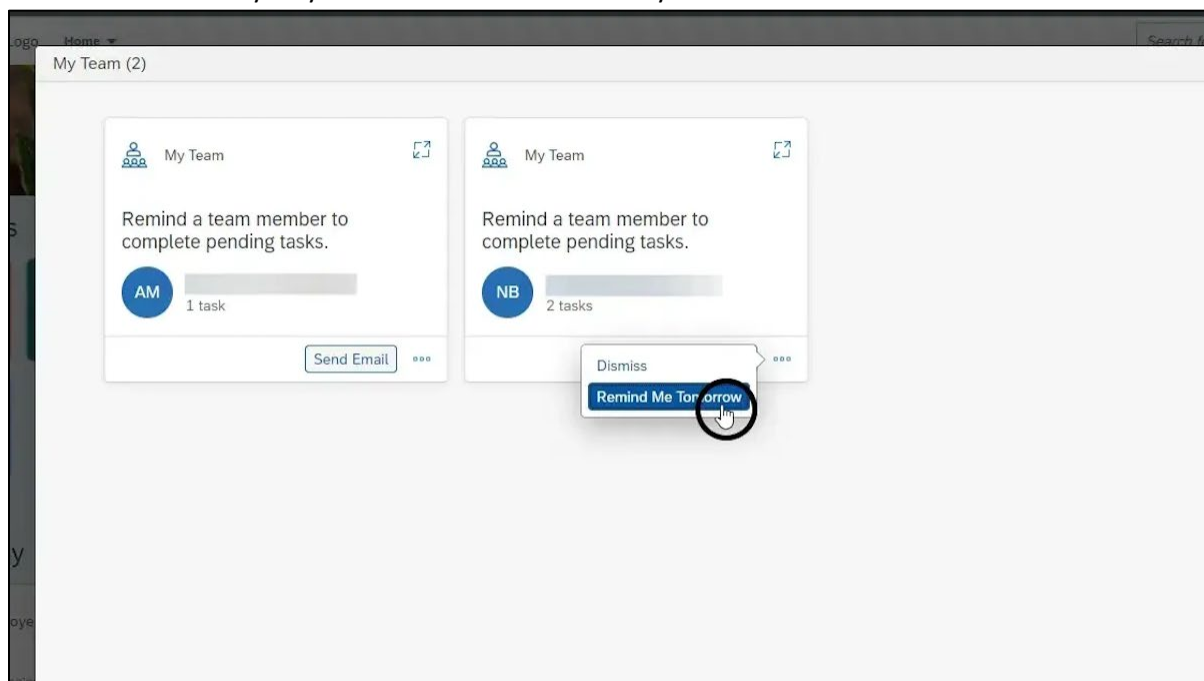
This screenshot shows the same 'Send an Email' dialog box as the previous one, but with a different annotation. A black circle is drawn around the 'Send' button at the bottom right, which is highlighted in blue. The 'Subject' field still contains 'To-Do Task Reminder'. The 'Message' field contains the same text as before, but the redaction in the salutation 'Hi [redacted]' has been replaced with a greyed-out version of the name. The 'Copy me' checkbox remains checked.

7. If you don't want to send an email, click the box with the 3 dots to see your other options.

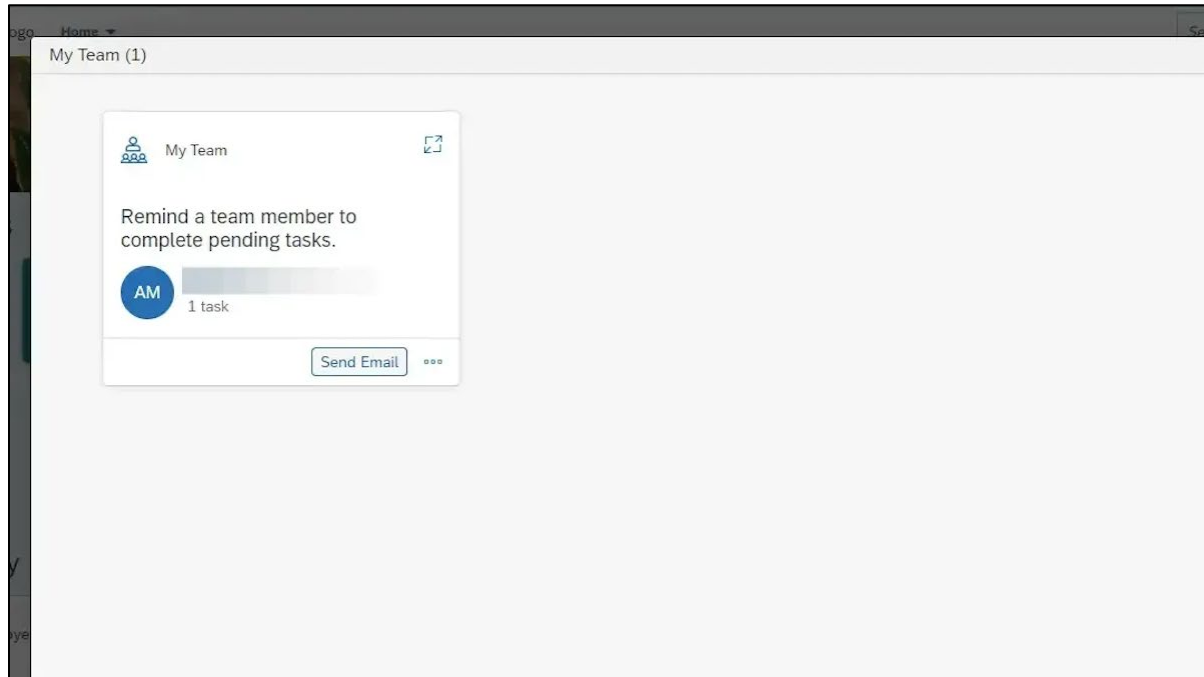


8. You can either "Dismiss" the reminder or you can select "Remind Me Tomorrow."

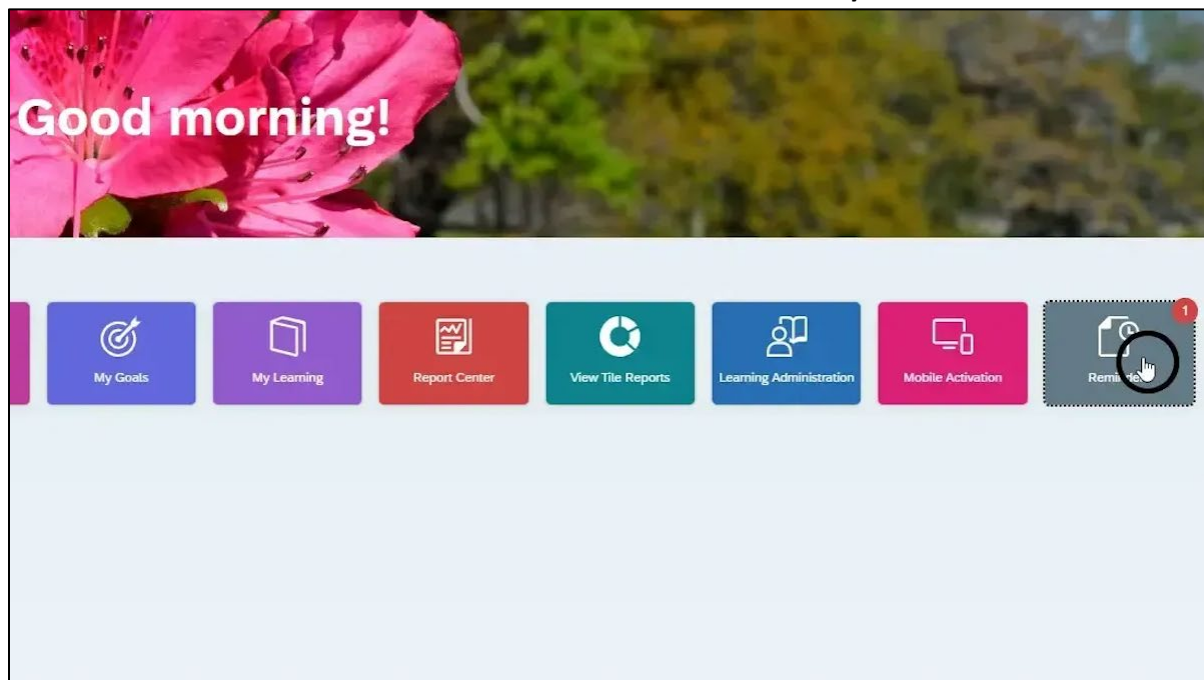
NOTE: This is the only way to create reminders in the system.



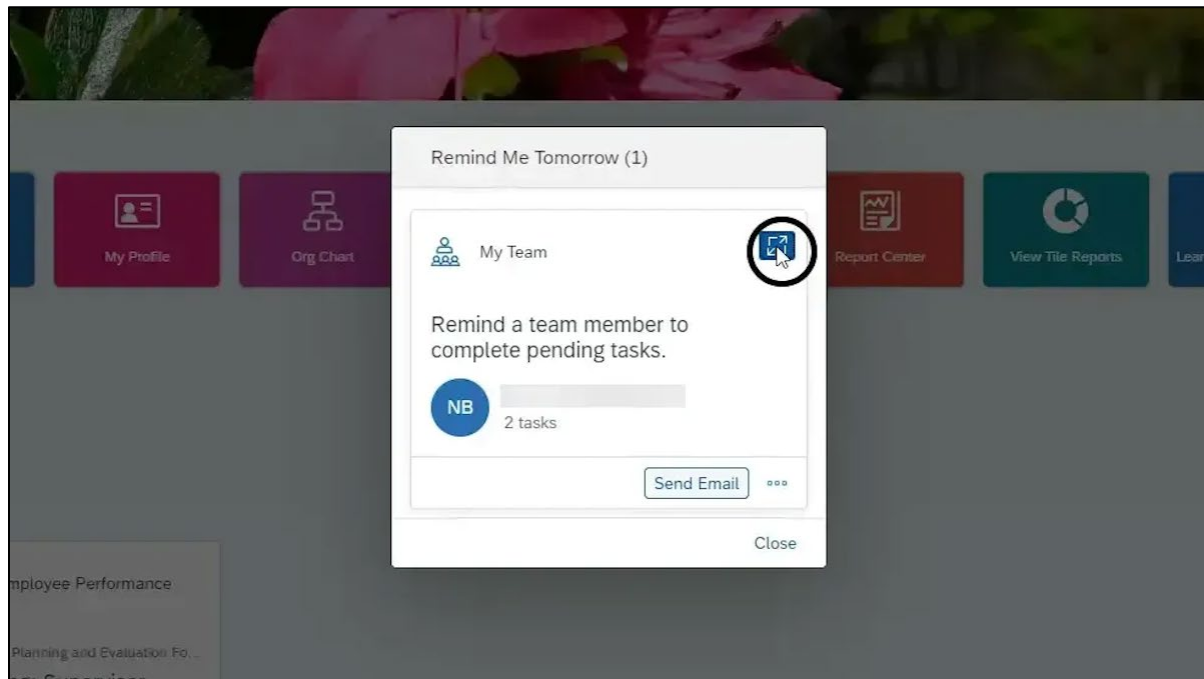
9. Your other option is to close the window and ignore the reminders.



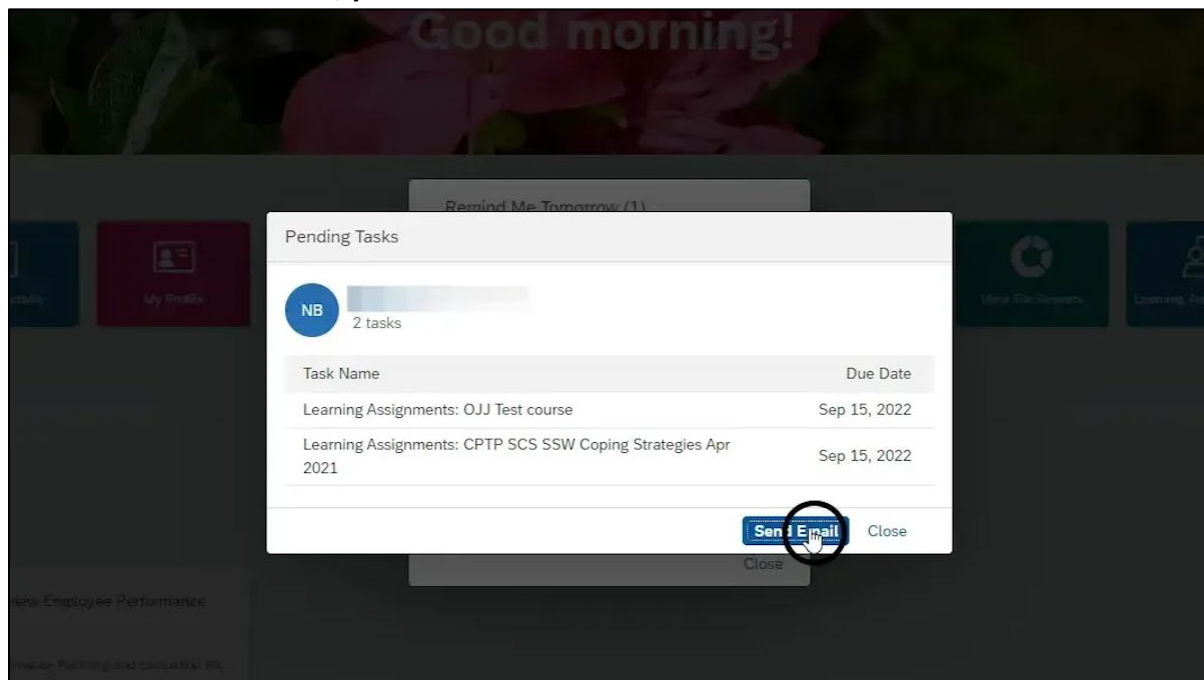
10. Click on the "Reminders" Quick Action tile to view the reminders you create.



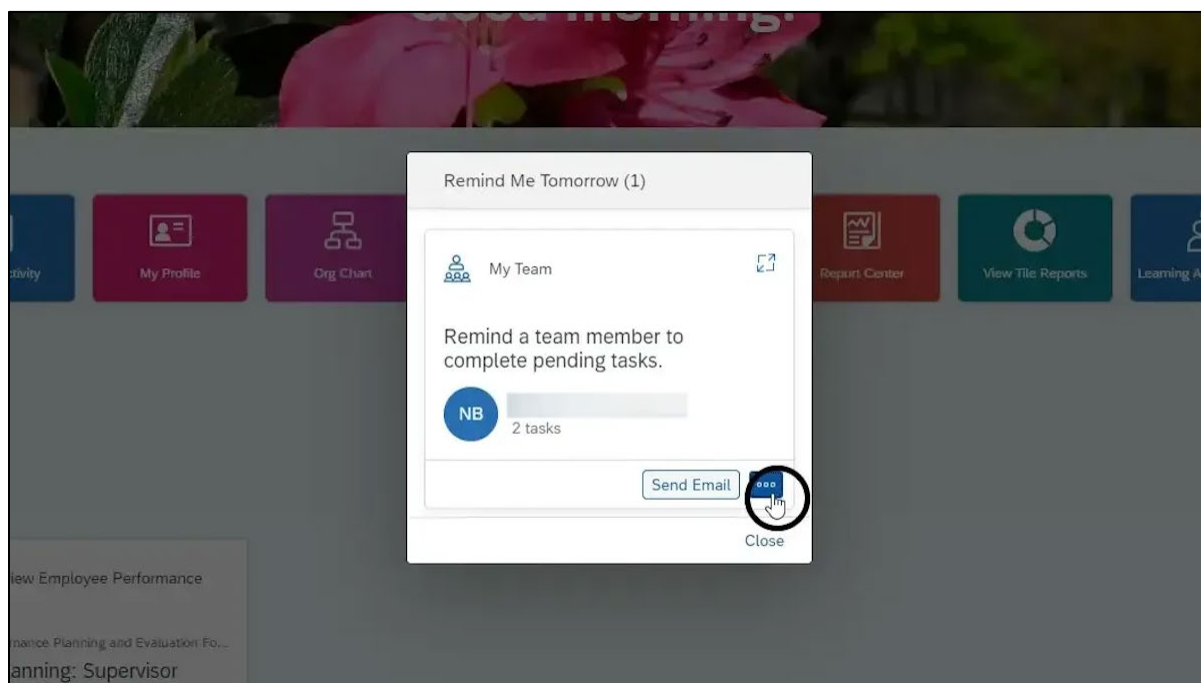
11. Click on the expand icon in the top right of the reminder to see a detailed view.



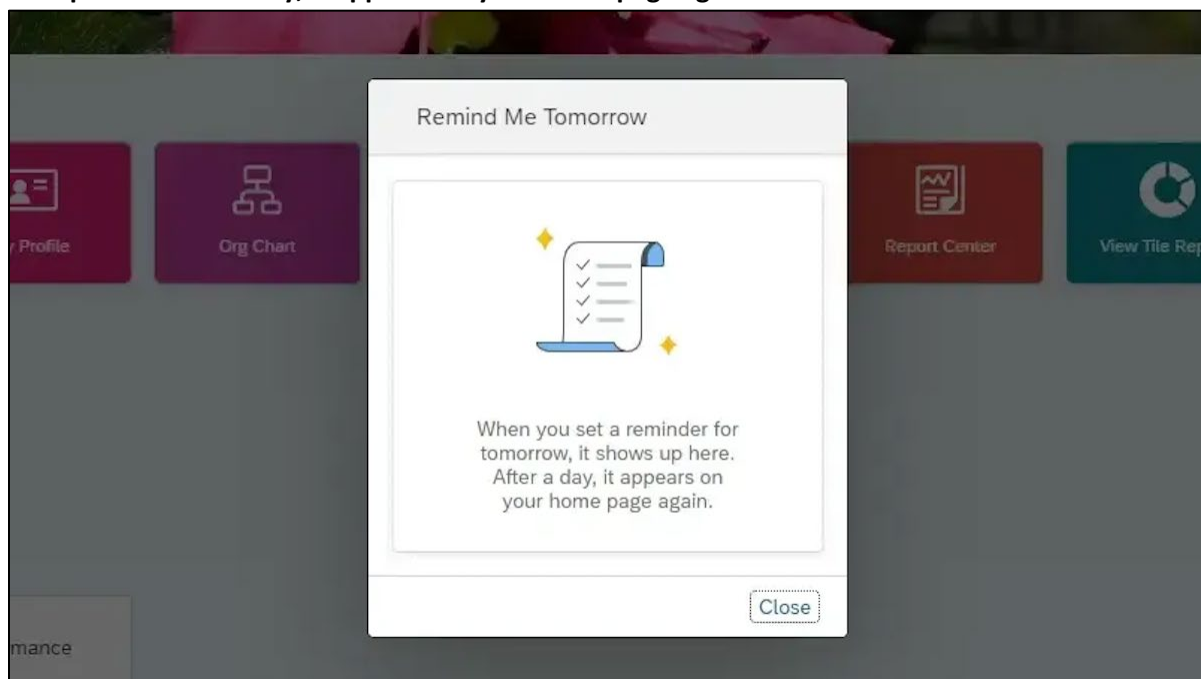
12. From the detailed view, you can send a reminder email or close the window.

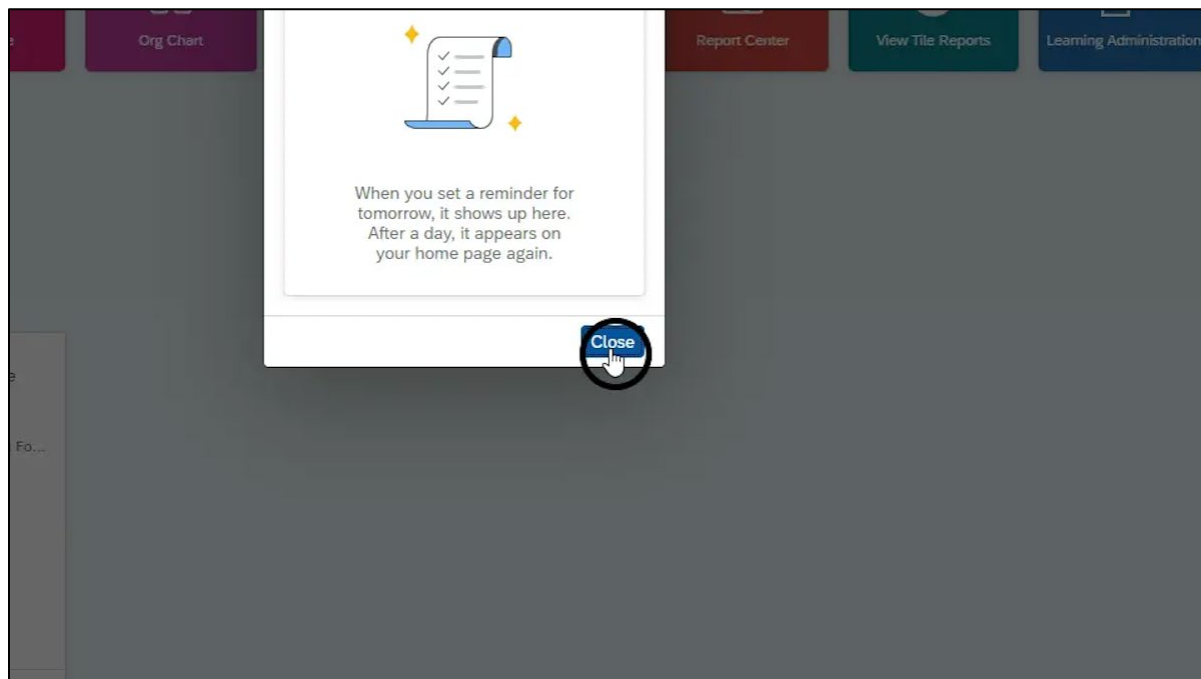


13. Click on the box with the three dots to see your options. From this view, your only option will be to dismiss the reminder.

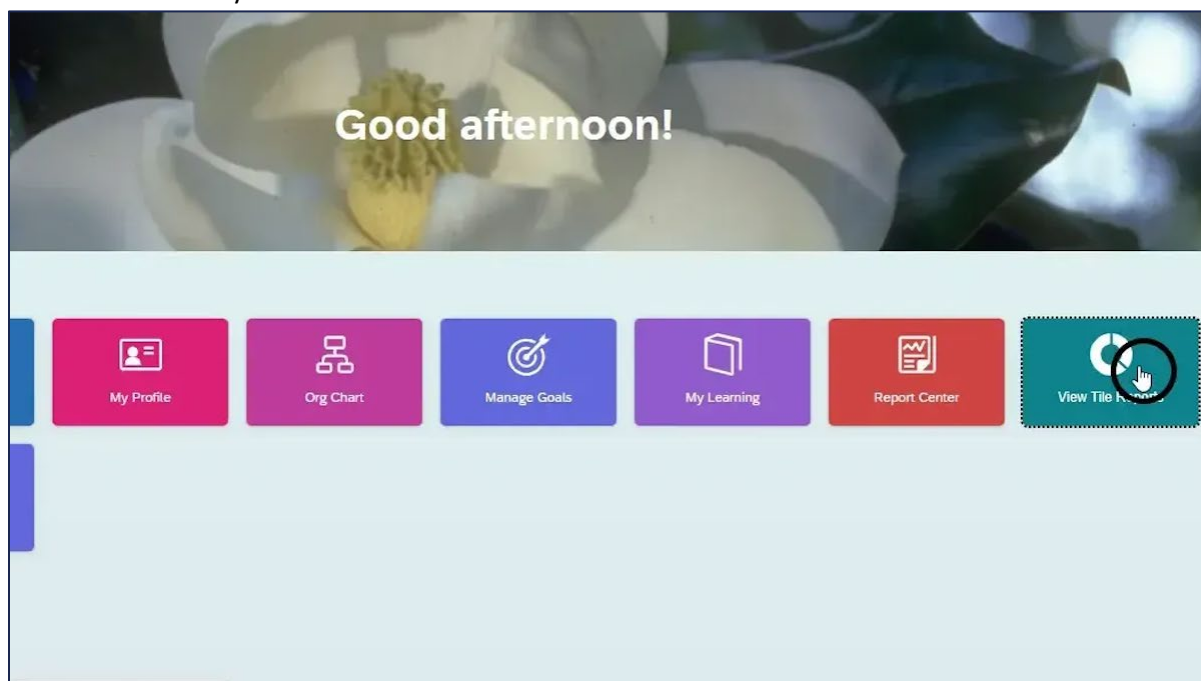


14. After you dismiss a reminder, you will get this message: "When you set a reminder for tomorrow, it shows up here. After a day, it appears on your home page again."

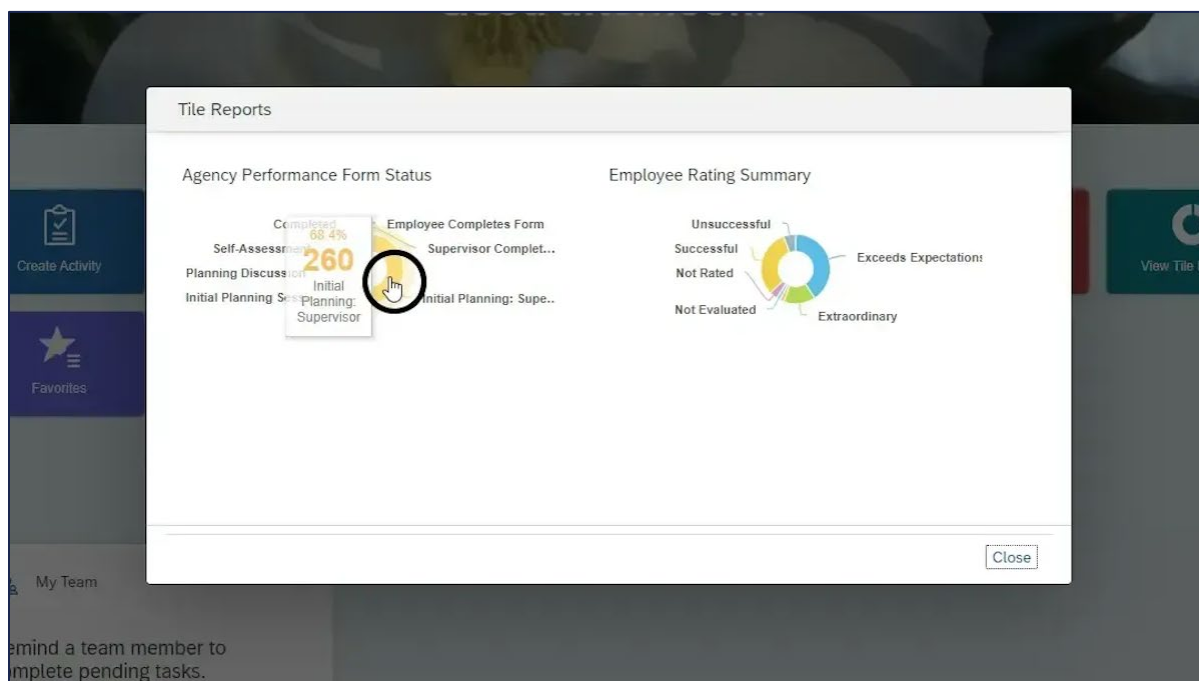


**15. Click "Close" to close the window.****TILE REPORTS****1. When you click on "View Tile Reports," a reporting dashboard opens.**

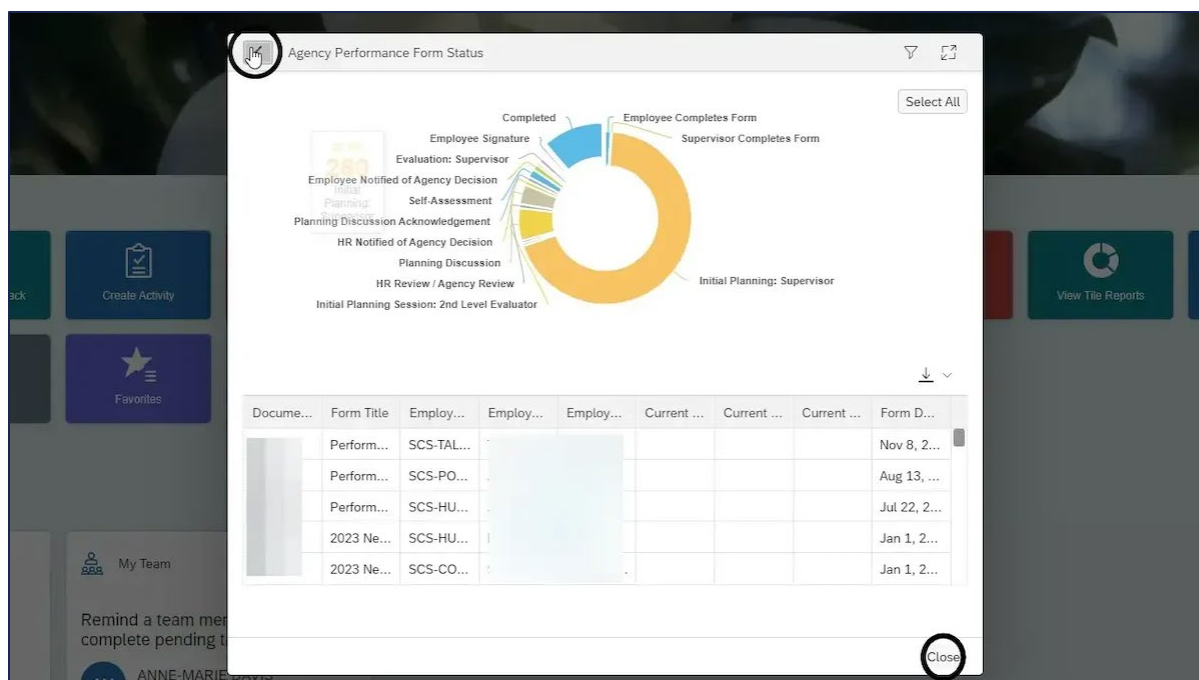
NOTE: Your tile may be a different color or in a different location.



2. Your Agency Administrator determines what is shown in your Tile Reports. In some instances, you can hover over the charts for more information.



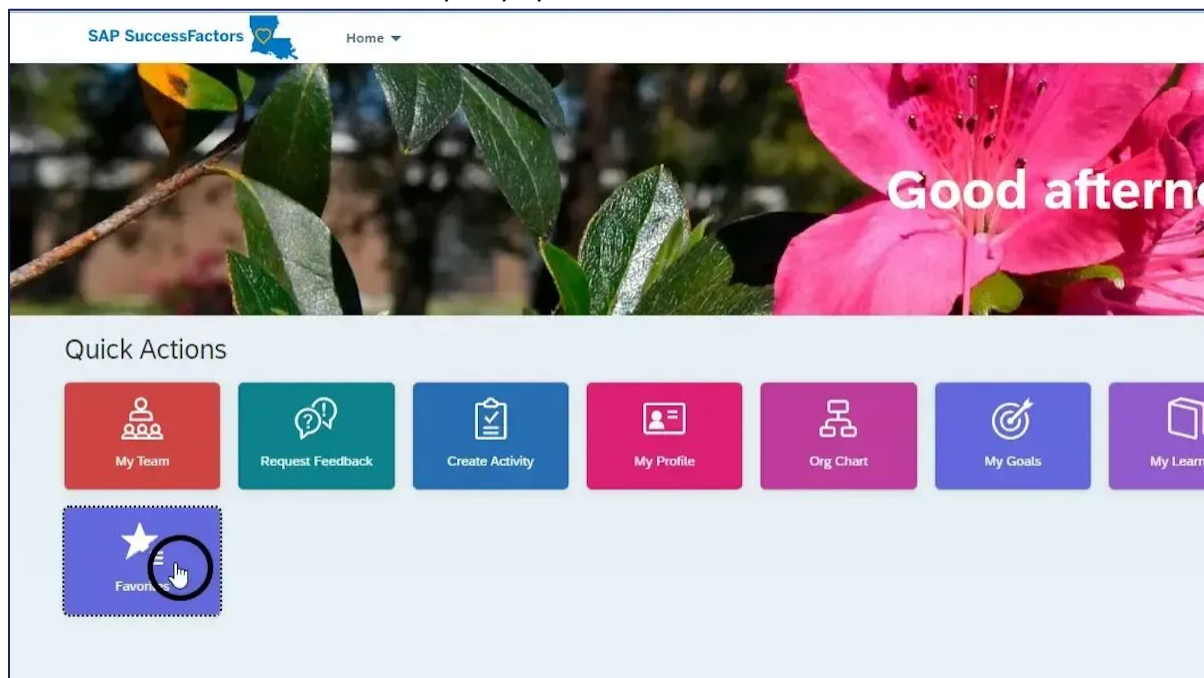
3. After reviewing the report, click the arrow to return to your Tile Reports or click "Close" to close the window.



## USING FAVORITES

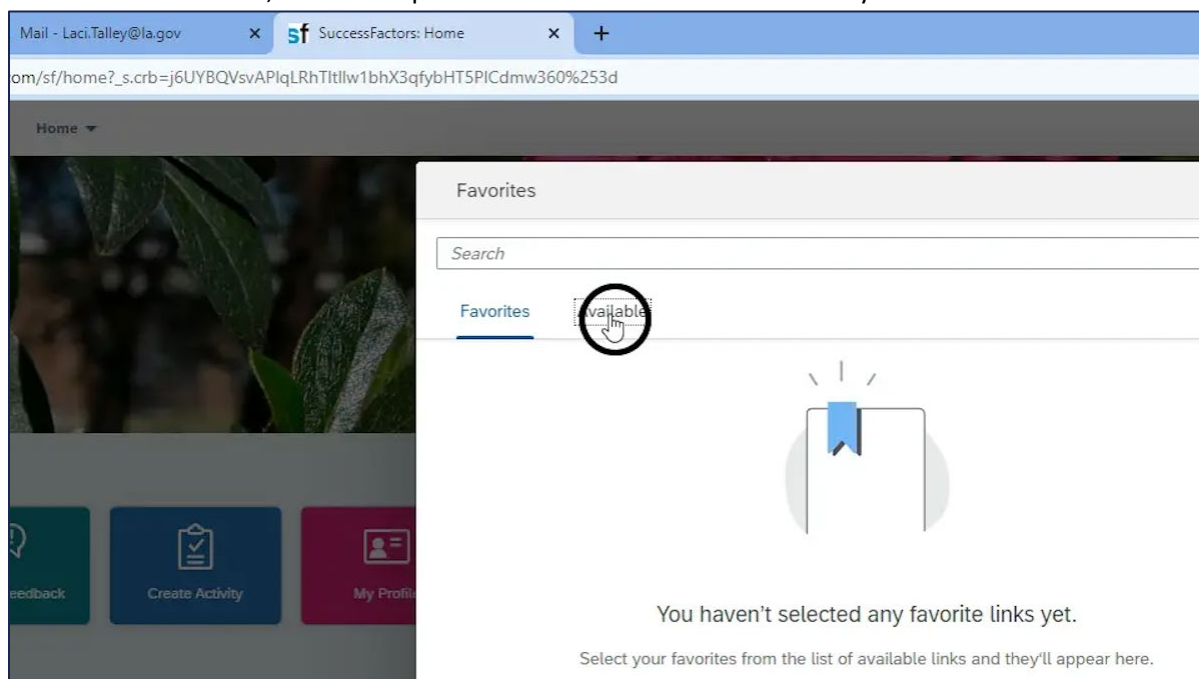
### 1. Click on the "Favorites" Quick Action tile.

NOTE: The tile color and location may vary by individual.

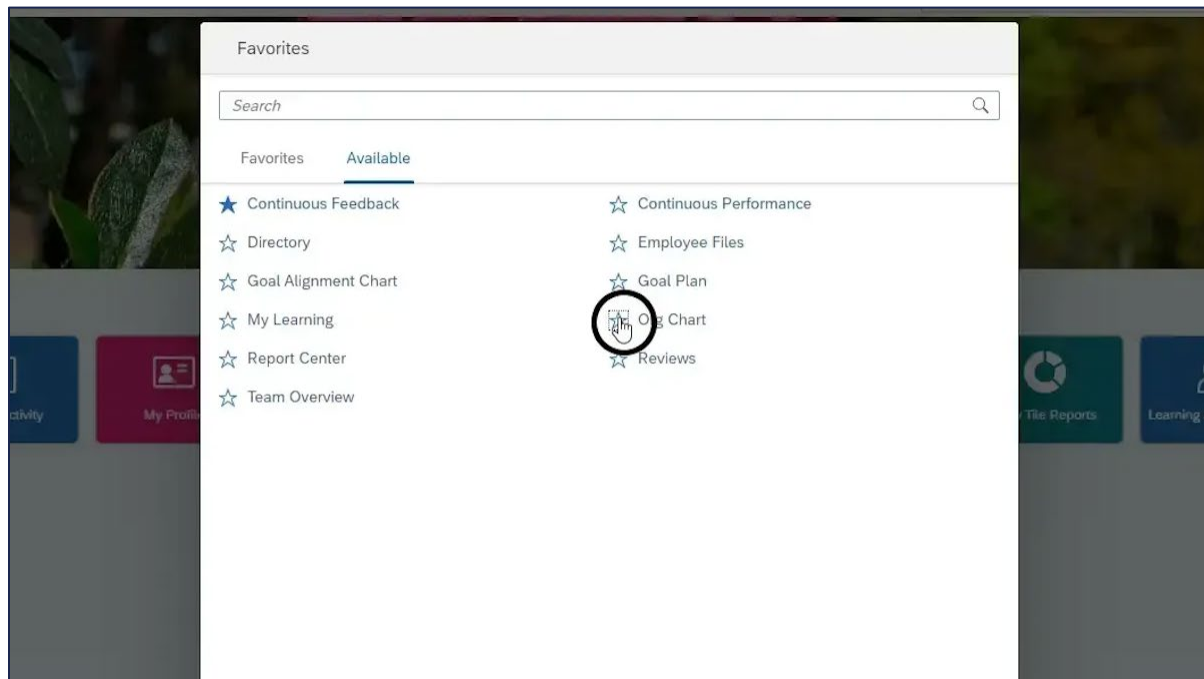


### 2. Click "Available" to see your options for Favorites.

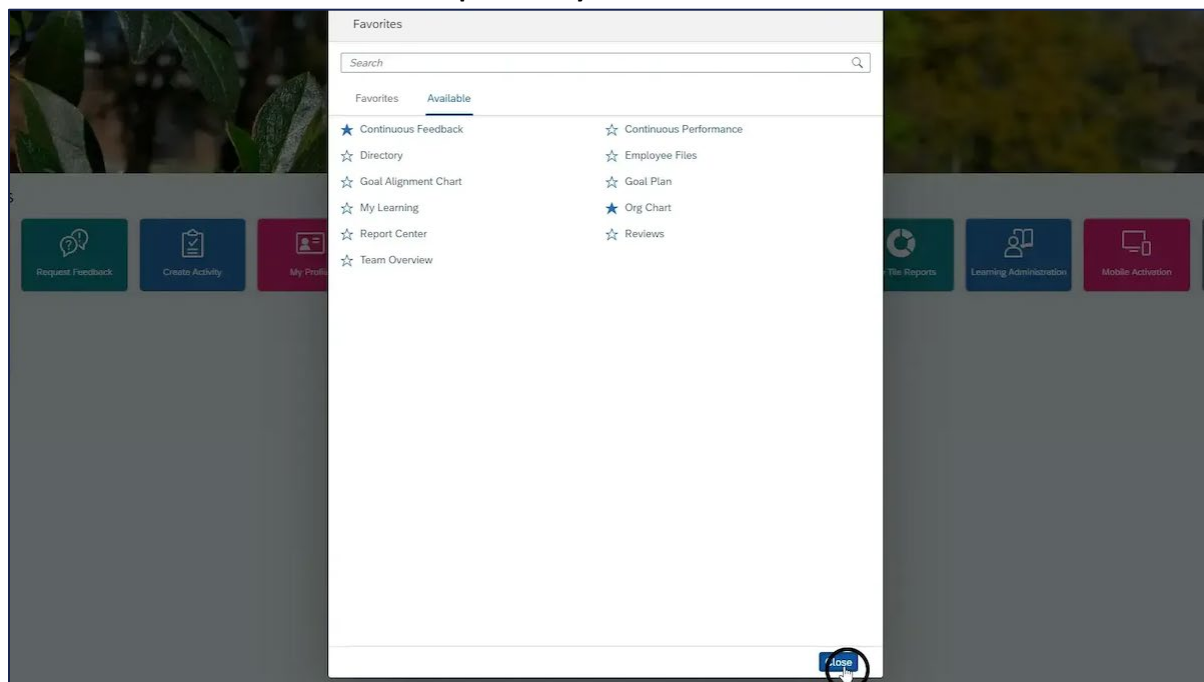
NOTE: This role based, so not all options shown will be available to everyone.



3. Click on the star next to the option you would like to add to your Favorites.

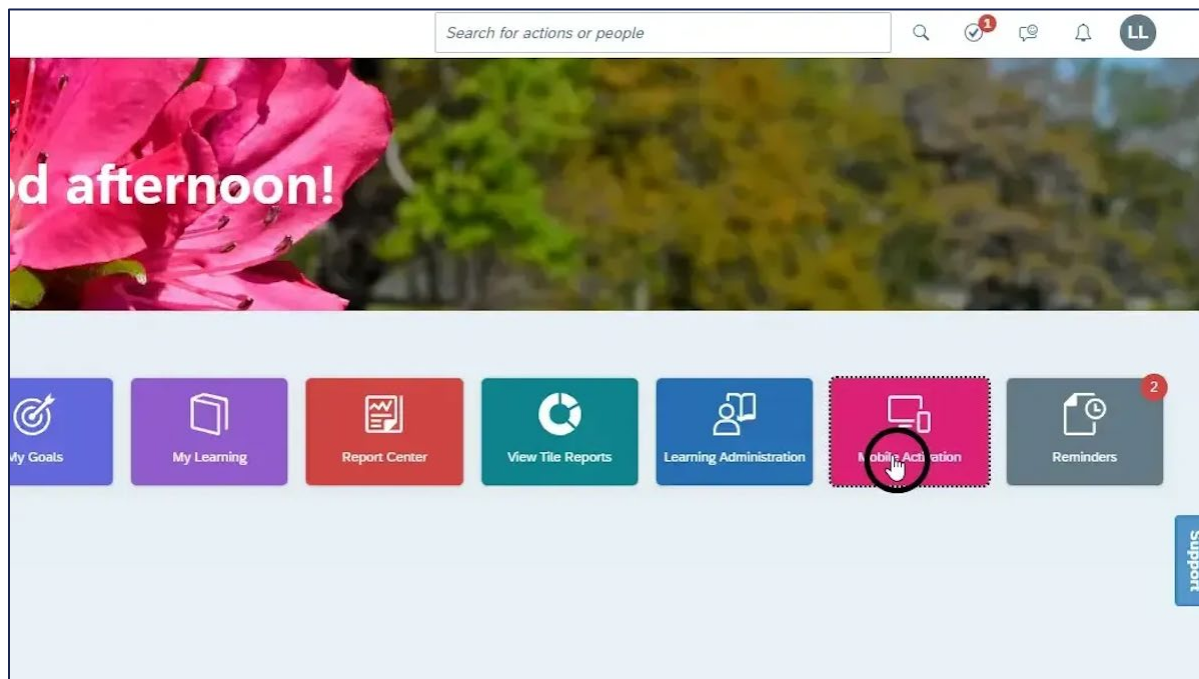


4. Click "Close" to add all selected options to your Favorites tile.



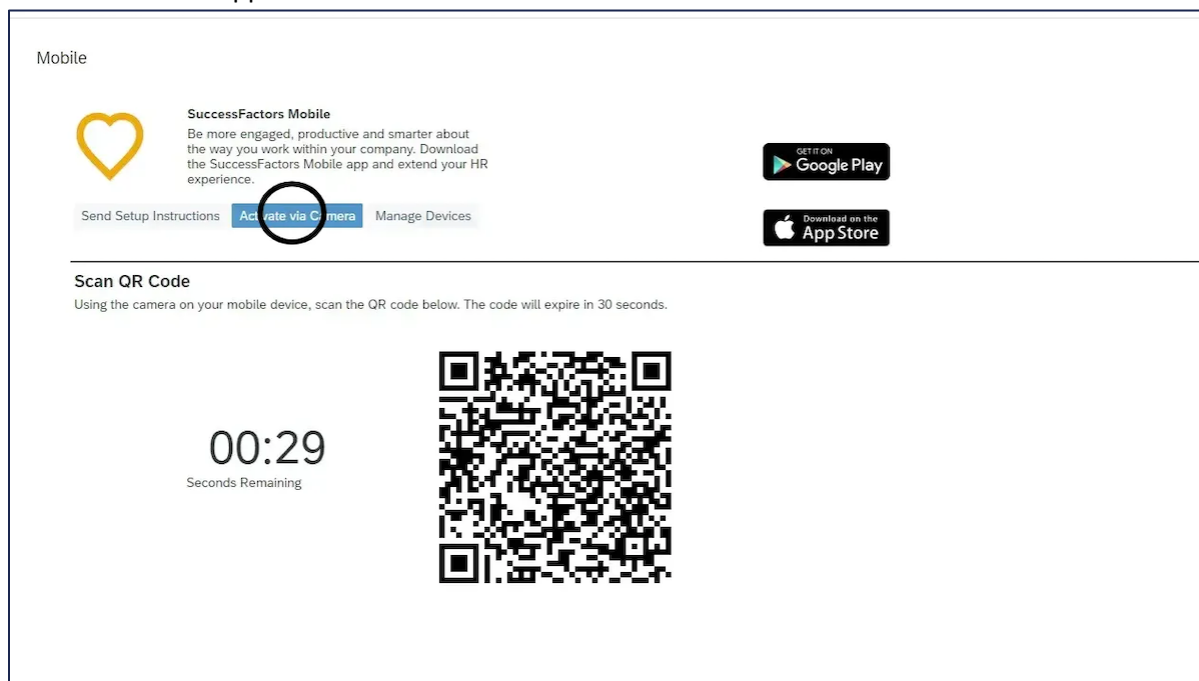
## MOBILE ACTIVATION

### 1. Click on the "Mobile Activation" Quick Action tile.




### 2. Option 1: Click on "Activate via Camera" to 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, click "Get New Code" and a new QR code will appear.





### 3. Option 2: Click on "Send Setup Instructions" to highlight it.

Mobile



**SuccessFactors Mobile**  
Be more engaged, productive and smarter about the way you work within your company. Download the SuccessFactors Mobile app and extend your HR experience.

[Send Setup Instructions](#) [Activate via Camera](#) [Manage Devices](#)



---


**SAP SuccessFactors Mobile App Setup Instructions**  
Setup instructions will be sent to the email address shown here. You may change it to a different email address before you click **Send Email**.

Email Address

[Send Email](#)



### 4. Click "Send Email" for setup instructions to be sent.

Mobile



**SuccessFactors Mobile**  
Be more engaged, productive and smarter about the way you work within your company. Download the SuccessFactors Mobile app and extend your HR experience.

[Send Setup Instructions](#) [Activate via Camera](#) [Manage Devices](#)



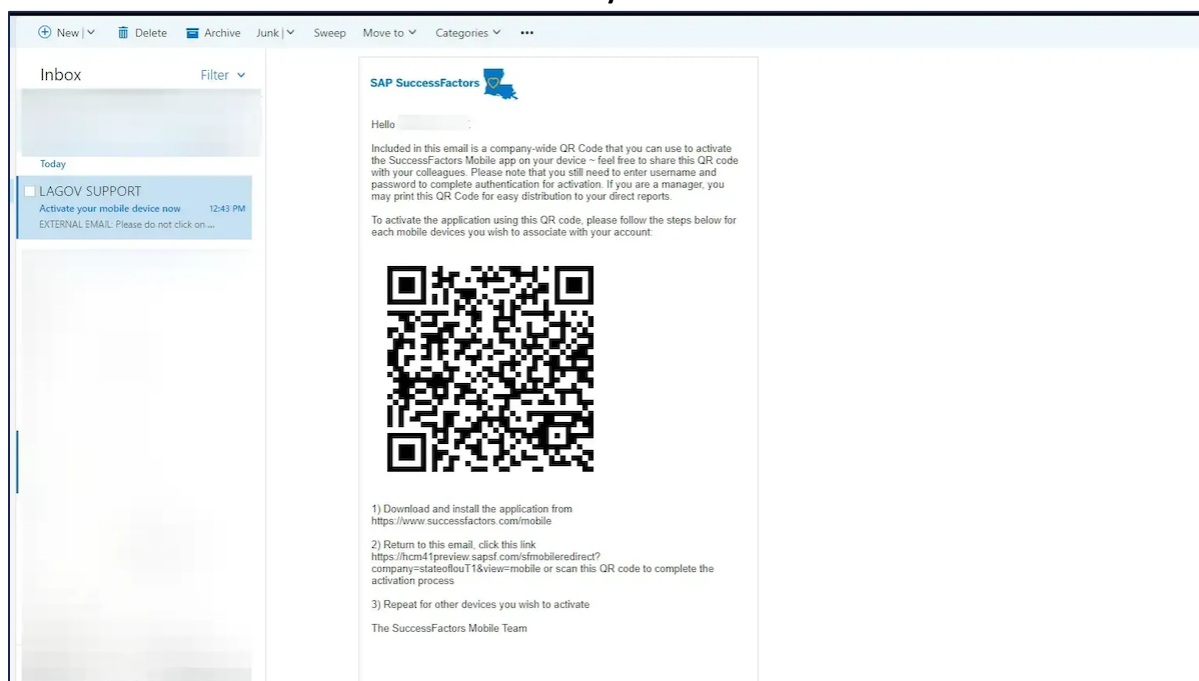
---

**SAP SuccessFactors Mobile App Setup Instructions**  
Setup instructions will be sent to the email address shown here. You may change it to a different email address before you click **Send Email**.

Email Address

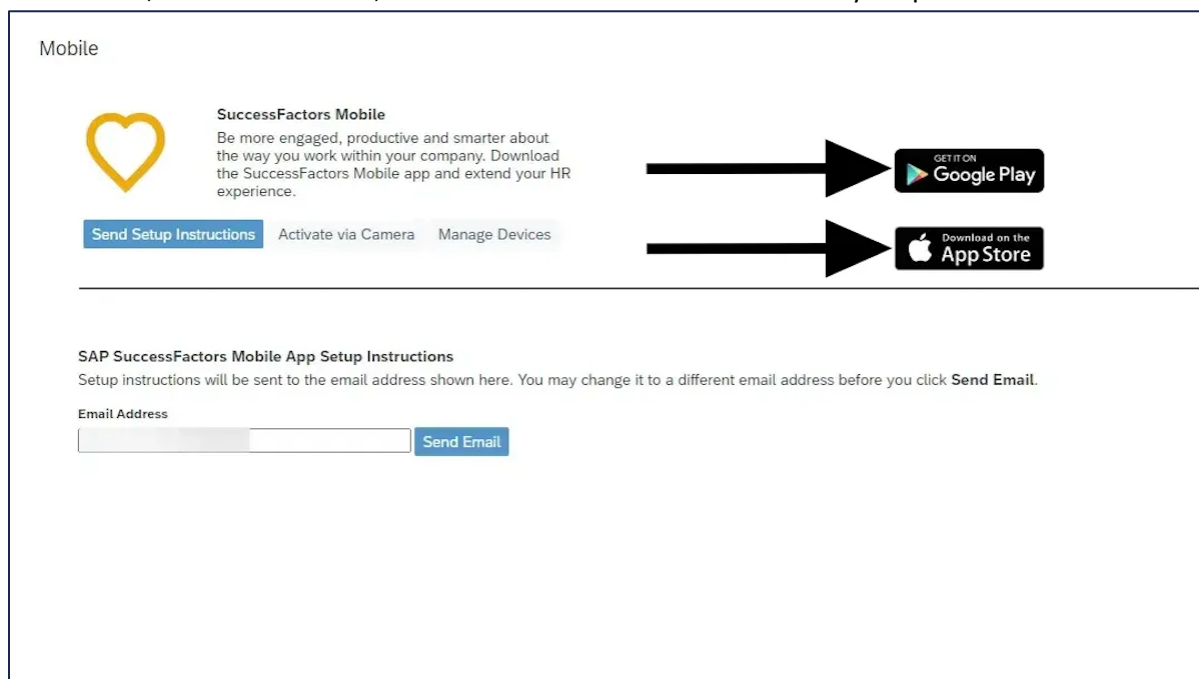
[Send Email](#)

5. You will receive an email from LAGOV SUPPORT with "Activate your mobile device now" as the subject. Follow the directions in the email to activate your device.



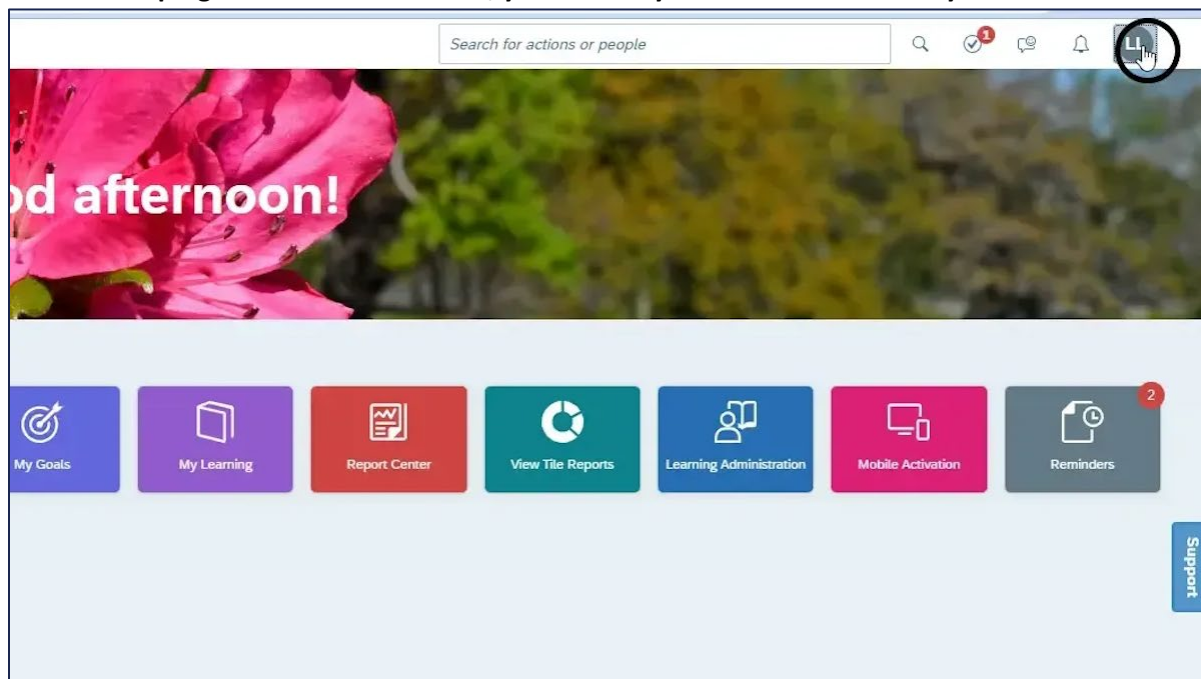
6. Option 3: Download the SuccessFactors app on the appropriate app store for your device. Follow the on-screen instructions on your device.

NOTE: Then, in Success Factors, click on "Activate via Camera" and use your phone's camera to scan a QR Code.

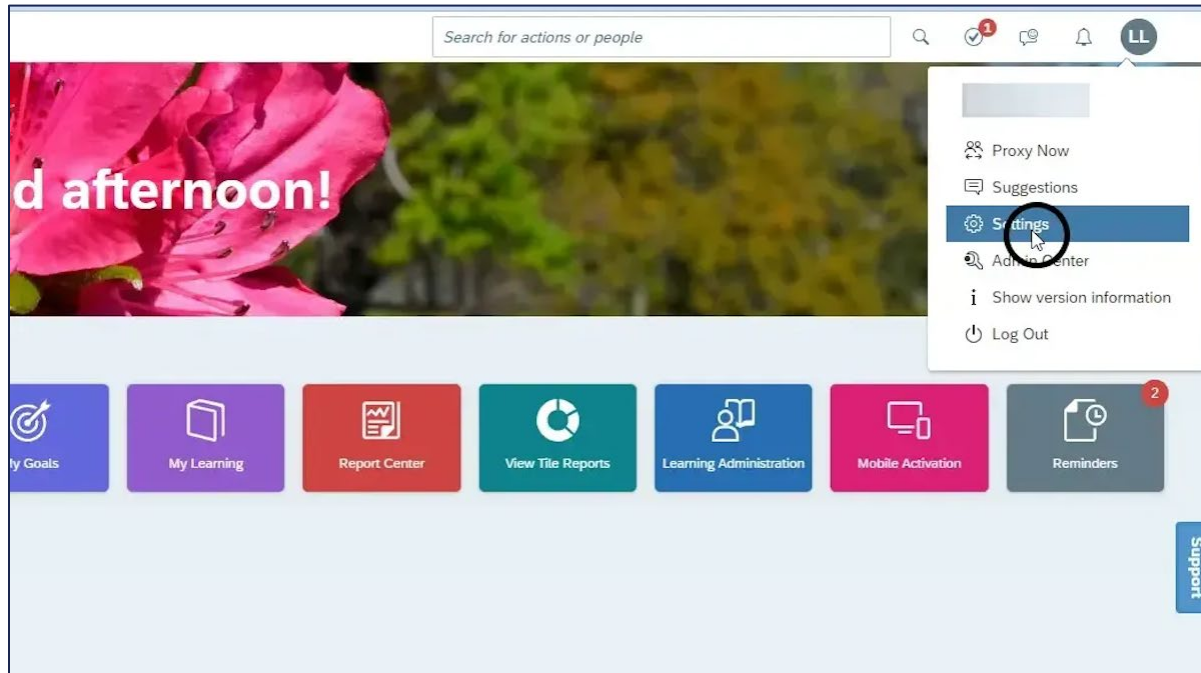


## HOW TO CHANGE YOUR SETTINGS

1. In the top right corner of the screen, you will see your User Icon. Click on your User Icon.

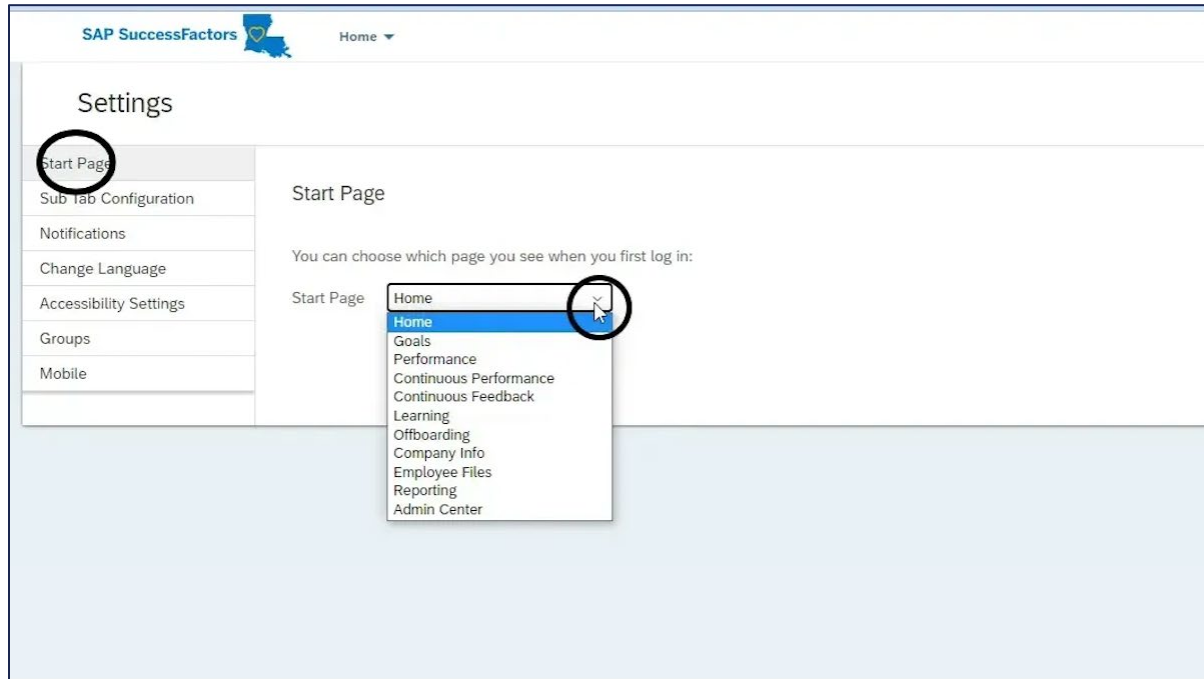


2. Click on "Settings" in the menu.



3. Click on "Start Page" and use the drop-down menu to select the page you want to see when you first log in.

NOTE: The default page - Home - is recommended.



4. After you click "Save" to save your Start Page, you will get a message confirming your selection.



5. Click on "Sub Tab Configuration" to select which sub tab first shows when you click on a tab. Use the drop-down menus to select tabs. Click "Save" when you are finished.

**Settings**

- Start Page
- Sub Tab Configuration**
- Notifications
- Change Language
- Accessibility Settings
- Groups
- Mobile

**Sub Tab Configuration**

You can choose which sub tab you see when you click on a tab:

Home	Home
Goals	Goal Plan
Performance	Goal Plan
Learning	Goal Alignment Chart
Company Info	Help & Tutorials
Employee Files	My Learning
Reporting	Org Chart
	Employee Files
	Report Center

**Save**

6. Click "Notifications" to select how you want to receive Notifications. Click "Save Notification" to save your preference.

NOTE: The system will email you certain notifications, regardless of what is selected.

**Notifications**

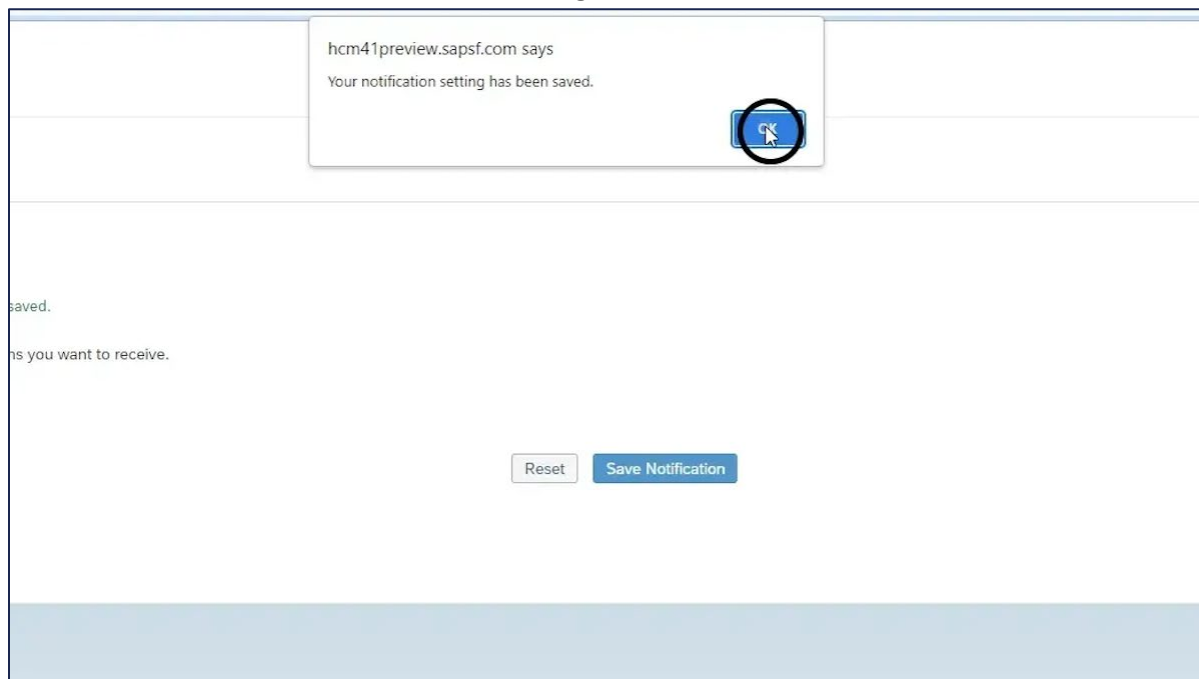
Choose the type of email notifications you want to receive.

☒ Send emails to me

☐ Read messages in the system

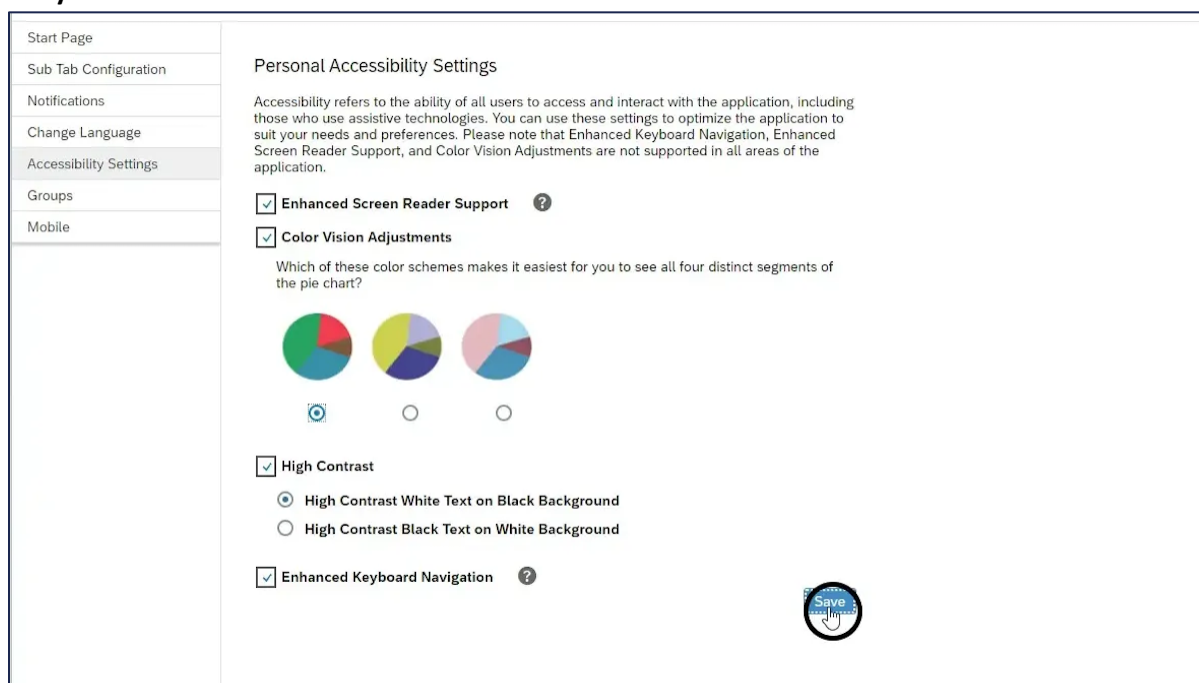
**Reset** **Save Notification**

**7. Click "OK" to close the confirmation message window.**



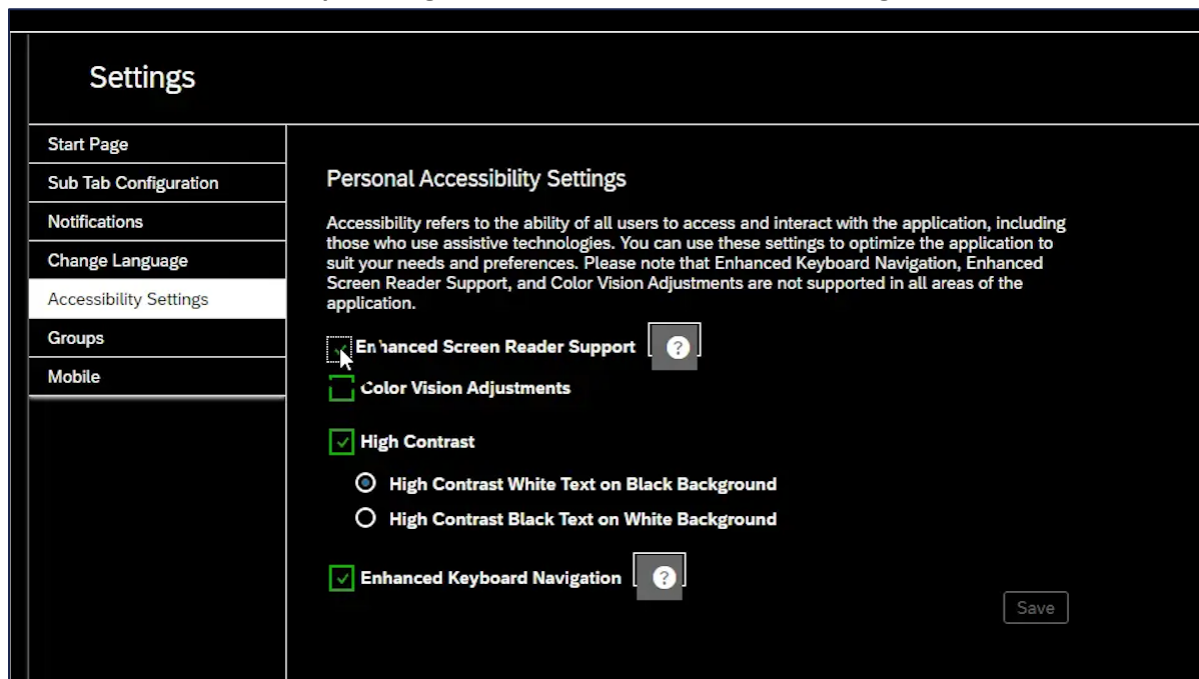
The screenshot shows a confirmation message window at the top with the text: "hcm41preview.sapsf.com says Your notification setting has been saved." A circular callout with an "OK" button is positioned over the message. Below the message, the main form contains the text "saved." and "ns you want to receive." At the bottom of the form are two buttons: "Reset" and "Save Notification".

**8. Click "Accessibility Settings" to select support features, if necessary. Click "Save" after you have made your selections.**

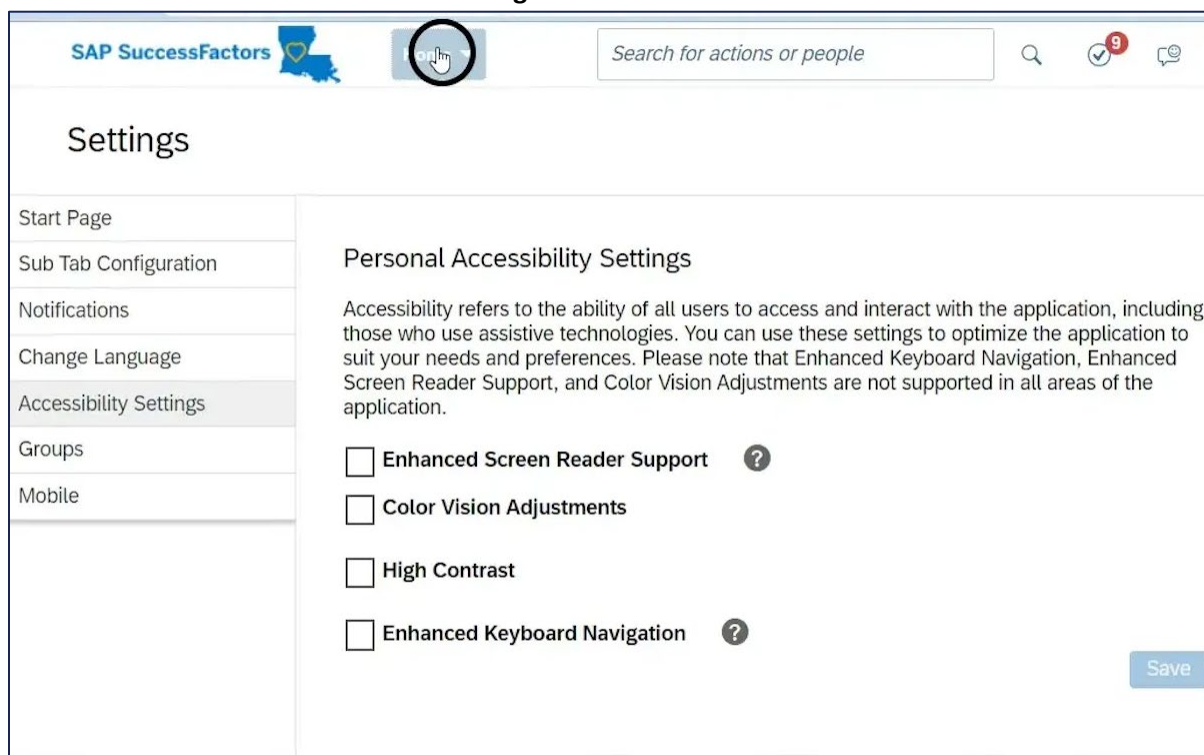


The screenshot displays the "Personal Accessibility Settings" page. On the left is a sidebar menu with options: "Start Page", "Sub Tab Configuration", "Notifications", "Change Language", "Accessibility Settings" (highlighted), "Groups", and "Mobile". The main content area is titled "Personal Accessibility Settings" and includes a descriptive paragraph about accessibility. Below this, there are three checked settings: "Enhanced Screen Reader Support" (with a help icon), "Color Vision Adjustments", and "High Contrast". Under "Color Vision Adjustments", a question asks "Which of these color schemes makes it easiest for you to see all four distinct segments of the pie chart?" and shows three pie charts with corresponding radio buttons. The first radio button is selected. Under "High Contrast", two radio buttons are shown: "High Contrast White Text on Black Background" (selected) and "High Contrast Black Text on White Background". At the bottom, "Enhanced Keyboard Navigation" is also checked (with a help icon). A circular "Save" button with a hand cursor is located in the bottom right corner.

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



10. Click on the Home menu to exit settings.



## PERFORMANCE MANAGEMENT BASICS

Performance Management is the ability to direct and to evaluate the work and the development of employees. A performance evaluation system provides structure to the communication that takes place between an employee and a supervisor. It gives both the supervisor and the employee guidelines on how to talk about performance, goals, and necessary improvements.

The Continuous Performance Management (CPM) system will help you:

- Establish clear work and behavior expectations
- Establish realistic work goals
- Hold people accountable for progress on work goals
- Delegate tasks based on agency and departmental goals
- Hold regular discussions to assess work performance

This performance evaluation system can, also, assist a state agency in meeting its mission. The process allows a supervisor to align employee performance expectations with agency goals and objectives, which can help employees know what role they play in helping the agency accomplish its mission.

Supervisors should look at the performance evaluation system as a roadmap to get their employees from where they are now to where they need them to be. When done right, a performance evaluation system is an excellent tool to raise employee performance.

Employees should think of a performance evaluation system as a great learning opportunity. Through this process, employees can learn what their supervisors view as important to be successful. Employees can also learn how to improve and enhance their performance through the feedback provided by their supervisors.

## PERFORMANCE MANAGEMENT CALENDAR

Here is the calendar for the 2022-2023 PMGM Pilot:

January 9, 2023	Pilot Begins
January 31, 2023	Initial planning steps: goals and comps chosen
February 28, 2023	2nd Level Approval must be complete
March 31, 2023	Planning Discussion Acknowledgement Complete
April 30, 2023	Self-Assessment must be completed
May 31, 2023	Evaluation by Supervisor
June 30, 2023	Evaluation 2nd Level
July 31, 2023	Evaluation Discussion Complete/Signature



# CONTINUOUS PERFORMANCE MANAGEMENT PROCESS OVERVIEW



## CPM PLANNING

**WHAT:** CPM Planning is a multi-step process that begins with creating a Goal Plan for your employee(s). The Goal Plan is automatically transferred to the performance management form by the system. The supervisor must then add competencies to the form before sending it to the 2<sup>nd</sup> Level Evaluator for review and approval. The CPM planning form is sent to the supervisor and the employee at the same time. The employee **MUST** acknowledge receiving the planning form **BEFORE** the planning discussion occurs. The supervisor, then, schedules and conducts a Planning Discussion with the employee. The supervisor documents the date and results of the planning discussion.



**WHEN:** Planning starts at the beginning of the calendar year.

**WHY:** Performance Planning is an opportunity for supervisors and employees to work together to establish goals and to develop a pathway for employee success.



## GOALS

**WHAT:** Goal Management facilitates and automates the process of creating, aligning, monitoring, and measuring organizational and individual goals. This system supports and encourages the use of SMART goals.



What type of goals should you set for your employees?

The answer depends on your agency's mission, the department's mission and goals, and the position description of the employee. In general, though, the goals should reflect:

- What actions should an employee take to successfully complete the job?
- How should the employee behave to successfully complete the job?

**WHEN:** Goal Management occurs throughout the performance year. However, creating the Goal Plan should occur during the Initial Planning Period.

**WHY:** With Goal Management, supervisors can break down broad organizational objectives into specific, manageable, and measurable components that can be assigned to employees in the form of clear, visible, and actionable goal plans.

### SF NOTES:

- *You must create a minimum of 2 goals on a Goal Plan.*
- *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, editing the Goal Plan is limited.*



<b>S</b>	<b>SPECIFIC</b>	Goals should be straightforward and state what you want to happen. Be specific and define what you are going to do. Use action words such as direct, organize, coordinate, lead, develop, plan, etc.	
<b>M</b>	<b>MEASURABLE</b>	If you can't measure it, you can't manage it. Choose goals with measurable progress and establish concrete criteria for measuring the success of your goal.	
<b>A</b>	<b>ATTAINABLE</b>	Goals must be within your capacity to reach. If goals are set too far out of your reach, you cannot commit to accomplishing them. Goals need to stretch you slightly so you feel you can do it and it will need a real commitment from you.	
<b>R</b>	<b>RELEVANT</b>	Goals should be relevant. Make sure each goal is consistent with your other goals and aligned with the goals of the company, your manager, or your department.	
<b>T</b>	<b>TIME-BOUND</b>	Set a timeframe for the goal: for next week, in three months, end of the quarter. Putting an end point on your goal gives you a clear target to work towards. Without a time limit, there's no urgency to start taking action now.	

## 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.

Fields marked with \* are required.

Category:

\* Goal Name\*:

\* How will it be measured?:

\* Start Date:

\* Due Date:

\* Weight:  %

Status:

% Complete:  %

Type:

Target	Target Date	Actual	Action
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	+ ↑ ↓ 🗑️

The first field, **Category**, is not required but it will default to “Performance” unless another category is selected.

You can select from 4 different categories:

1. Performance
2. Compliance
3. Personal Development
4. Other

NOTE: Selecting the correct category facilitates certain reporting and goal tracking features in SF.

Goal categories are defined as:

- **Performance** = Performance goals list the work tasks and/or behavior standards the employee is expected to achieve. These goals, generally, relate to the duties listed in the employee’s position description and should align with organizational goals and objectives.
- **Compliance** = Compliance goals identify policy-driven tasks and/or behaviors.
- **Professional Development** = These goals are created to expand the employee’s knowledge, skills, behaviors, and competencies as related to a particular job/job family or build toward future career goals.
- **Other** = This is for goals that do not align with the categories listed above.



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

- **Goal Name** = This is the actual goal, preferably written as a SMART goal.
- **How will it be measured?** = This is the criteria used to determine if the goal has been successfully reached. Performance metrics should be:
  - Simple – The employee needs to know exactly what is being measured.
  - Actionable – The metric must be in the employee’s span of control; likewise, the employee should be empowered to make decisions that impact the employee’s success.
  - Consistent – If multiple employees have the same goal, they should have the same metric.
- **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 a goal is a strategic decision. Choose one method and apply it to all of your employees.
    - You can use weights to prioritize the goals: the higher the goal weight, the more important the goal.
    - You can use weights to assist with time management: the goal weight correlates with the amount of time the employee will spend on the goal.
    - You can align goal weights with the weighted duties in employee's position description.

Optional fields are included to help track an employee's progress on a goal. Completing these fields will help with documentation, goal evaluation, and reporting. They can also help the employee with project planning, marking/celebrating milestones, and even guiding performance management meetings.



Optional fields include:

- **Status** = Within this submenu, 1 of 6 options may be selected: Not Started, On Track, Behind, Completed, Postponed, and Canceled.
- **% Complete** = This field is used to show how close to completion the goal is.
- **Type** = There are 4 options for this field: Department, Agency, Section, and Individual. "Department" is the default type, if nothing is selected.
- **Target** = Goal targets can be used to break larger goals into milestones and determine deadlines for each target. There is a 3000-character limit in this field, so you can be detailed in your planning and follow-up.

## GOAL STATUS: UNAPPROVED VS APPROVED

Once the CPM form is sent to the 2<sup>nd</sup> Level Evaluator, the Goal Plan is locked, and the supervisor cannot edit the form.



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

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

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

- Add goals
- Cascade goals
- Edit ALL goal fields
- Make Comments

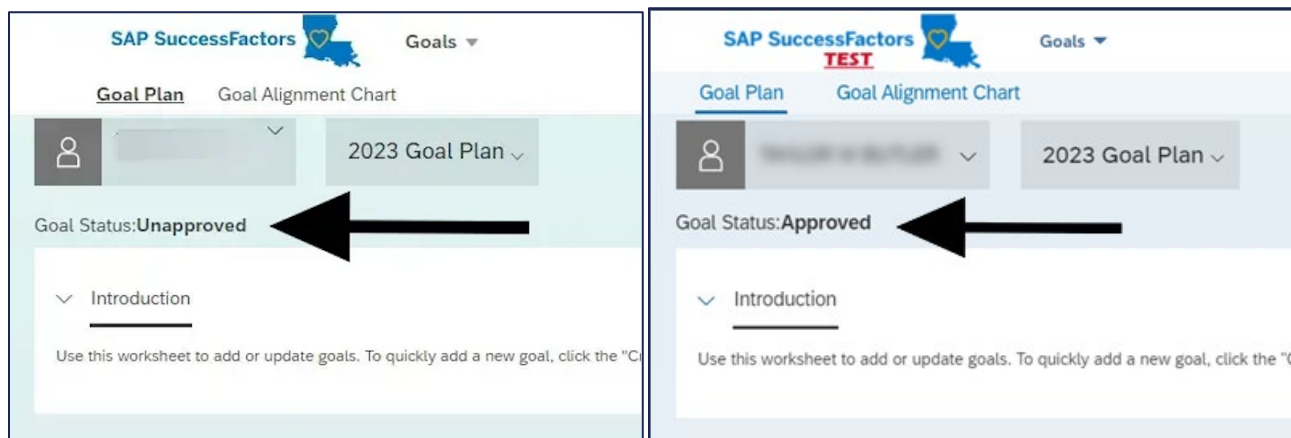
If the goal plan is **APPROVED**,

- The supervisor and/or the employee can only edit Category, Status, % Complete, and Target
- Goals cannot be added
- Goals cannot be cascaded

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

- Edit Category, Status, % Complete, and Target
- Make Comments

Only the HR Representative can use the “**UN-APPROVE**” feature to edit a Goal Plan.

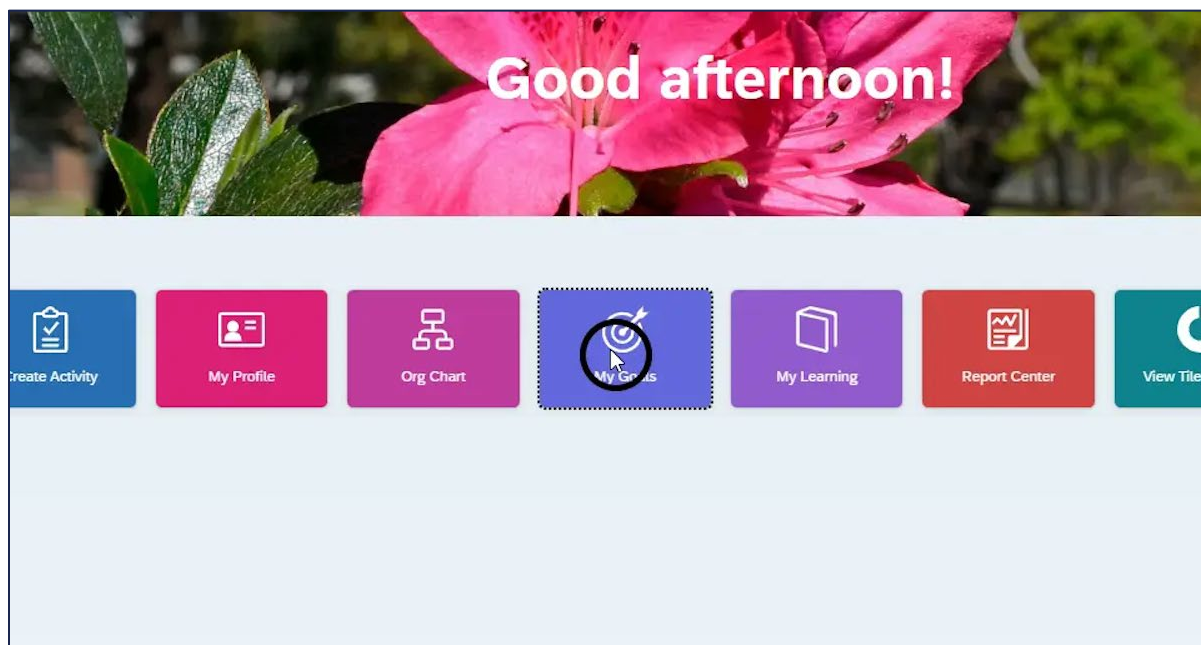


## HOW TO ACCESS A GOAL PLAN

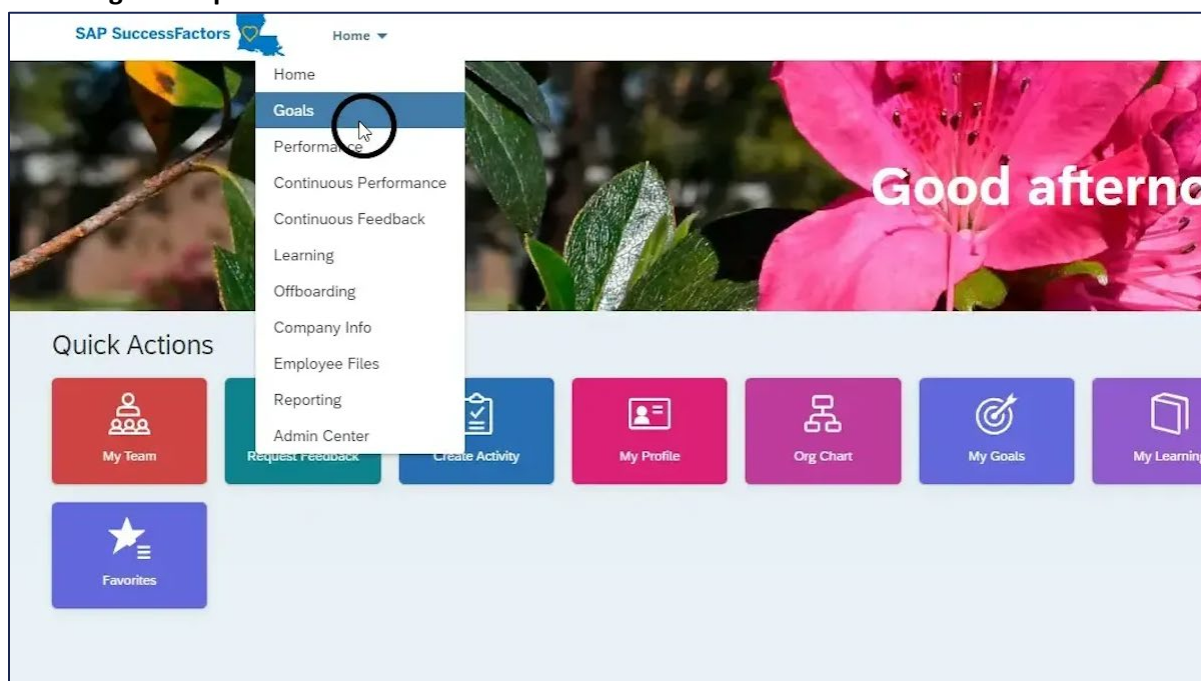
While you are not required to use the Goal Plan component, it does offer the ability for you and your employee to comment and to collaborate on goals. Also, the Goal Plan shows the Goal Status, which determines functionality, as discussed previously.



### 1. Navigation Option 1: Click on the "My Goals" Quick Action tile.



### 2. Navigation Option 2: Select "Goals" from the Home menu.



### 3. Your Goal Plan appears as the default page view. Click on the down arrow to view your employees.

NOTE: The Goal Status appears beneath the name of whose Goal Plan is being viewed.



SAP SuccessFactors

Goals

Goal Plan Goal Alignment Chart

2023 Goal Plan

Goal Status: **Unapproved**

Introduction

Use this worksheet to add or update goals. To quickly add a new goal, click the "Create a New Goal" button, or browse the hierarchy section to find an existing goal to add to your plan.

Displaying 0–0 of 0 Goals

Total Weight: 0.0% **Min: 100.0%**

(Min:2) **Minimum Not Met**

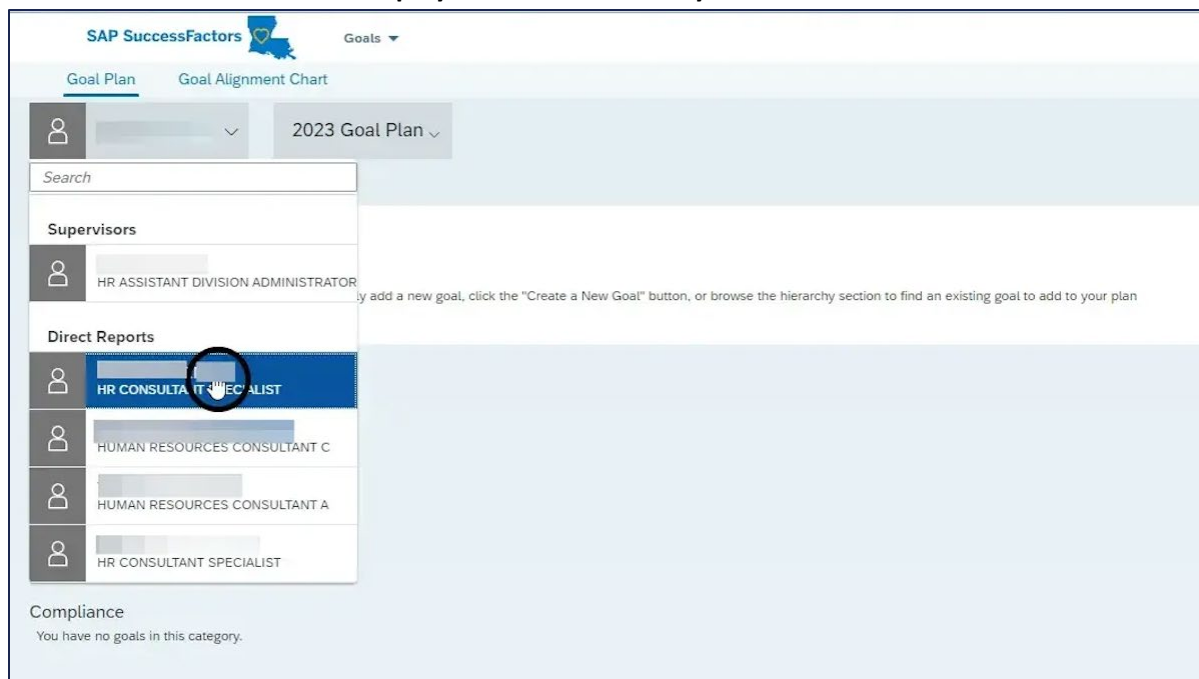
Performance

You have no goals in this category.

Compliance

You have no goals in this category.

#### 4. Click on the name of the employee whose Goal Plan you want to access.



SAP SuccessFactors

Goals

Goal Plan Goal Alignment Chart

2023 Goal Plan

Search

Supervisors

HR ASSISTANT DIVISION ADMINISTRATOR

Direct Reports

HR CONSULTANT SPECIALIST

HUMAN RESOURCES CONSULTANT C

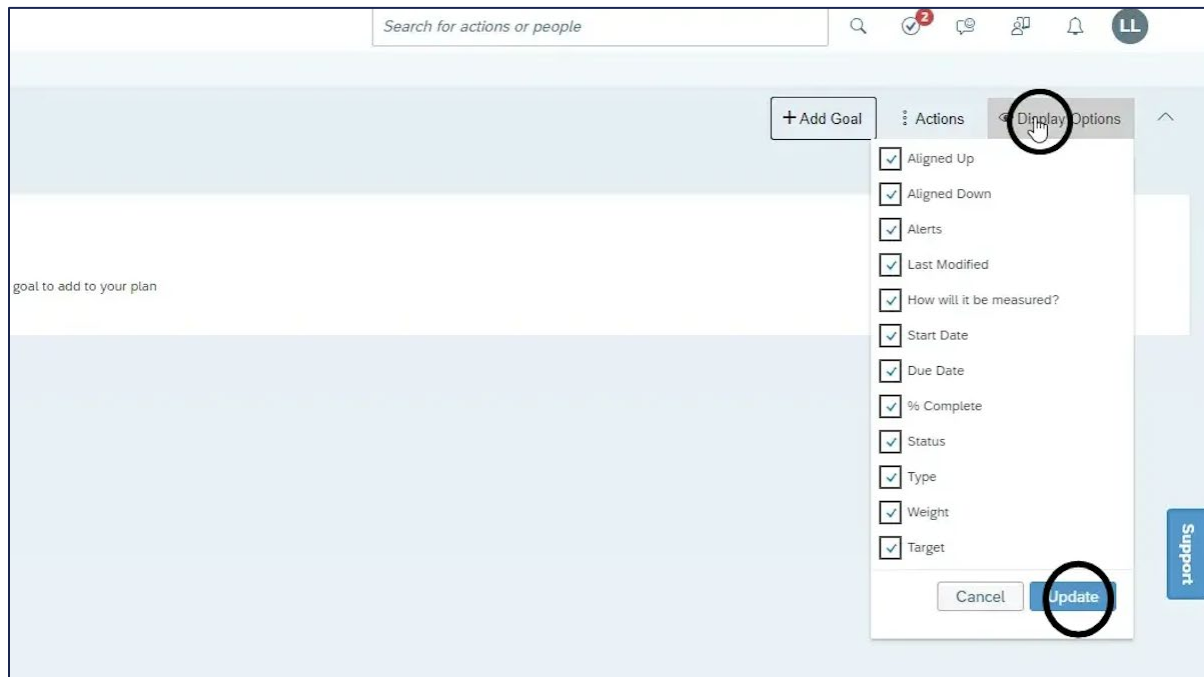
HUMAN RESOURCES CONSULTANT A

HR CONSULTANT SPECIALIST

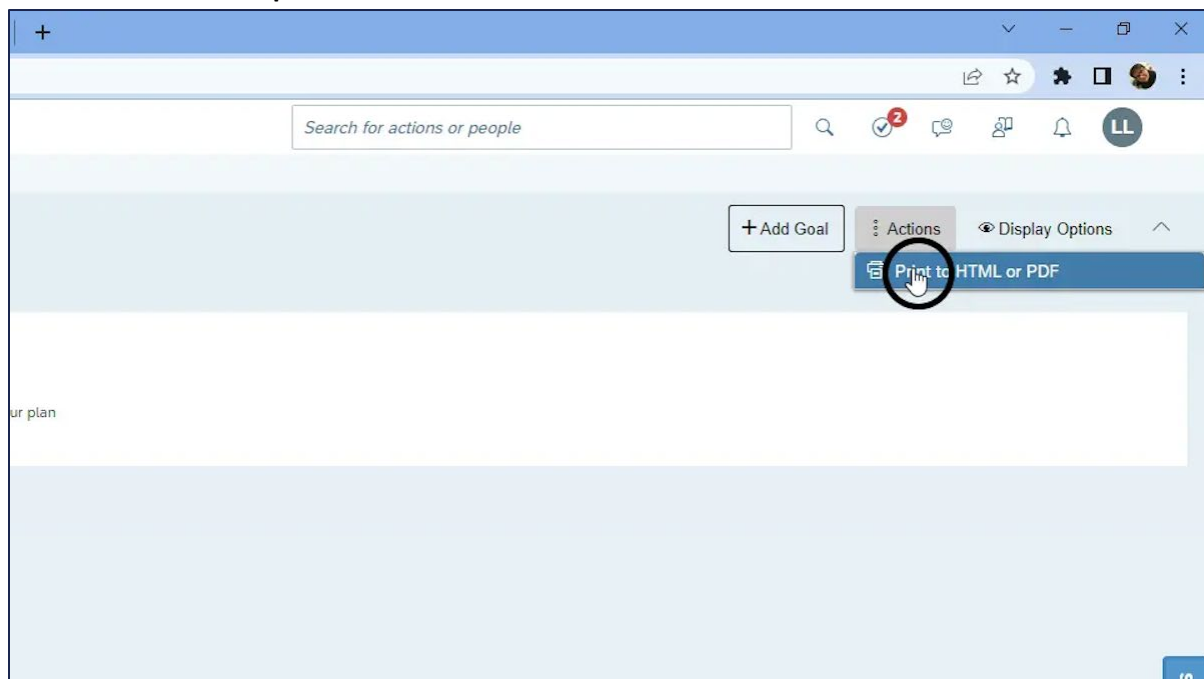
Compliance

You have no goals in this category.

5. You may click on "Display Options" to change what information is shown in the Goal Plan. Select/deselect the options you would like. Click "Update" when finished.



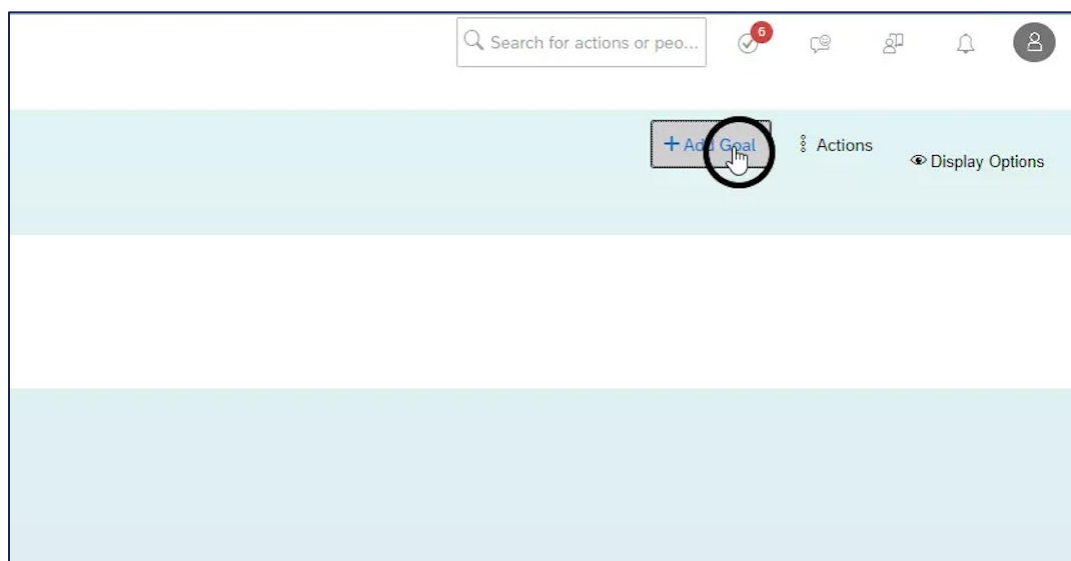
6. Click "Actions" to print to HTML or PDF.



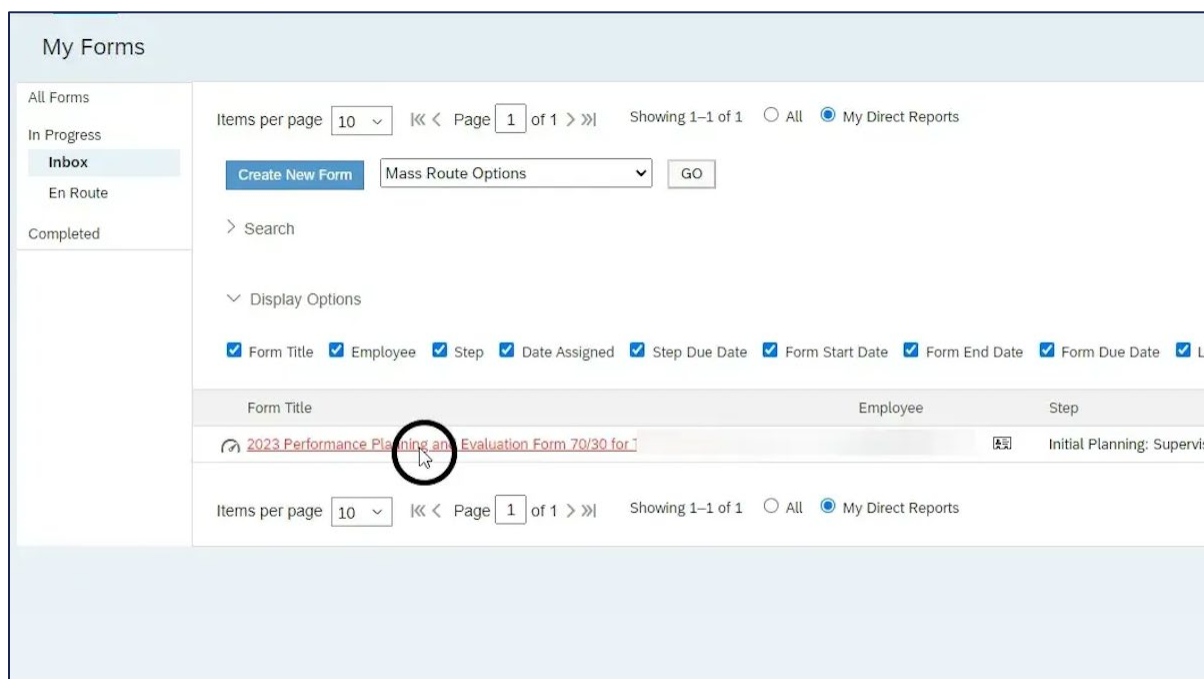
## ADDING GOALS

Goals may either be added through the Goal Plan or directly to the CPM Form. Regardless of the method used, the goal will appear simultaneously in both locations.

1. **Navigation Option 1: From the Goal Plan, click “+ Add Goal.” This will add the goal to both the Goal Plan and the CPM Form.**



2. **Navigation Option 2: Click on “Performance” in the Home menu. Open the correct CPM form In Progress - Inbox.**



### 3. Either scroll down or click "Goals" to jump to the Goals section of the form.

The screenshot shows the SAP SuccessFactors Performance interface. At the top, there's a header with 'SAP SuccessFactors' and a Louisiana state icon. Below it, a navigation bar includes 'Reviews' and 'Team Overview'. A 'Back to: Inbox' link is visible. The main title is '2023 Performance Planning and Evaluation Form 70/30 for [redacted]'. A summary box shows a profile icon, a red checkmark, and '0 Incomplete Items'. A horizontal menu below the summary includes 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', 'Goals' (highlighted with a black circle), and 'Competencies'. Below this is a 'Route Map' section showing a progress bar with four steps: 1. Initial Planning: Supervisor (Due 01/31/2022), 2. Initial Planning Session: 2nd Level Evaluator, 3. Planning Discussion, and 4. Self-Assessment. The 'Goals' tab is currently selected. Below the route map is an 'Introduction' section with a welcome message from the State Civil Service (SCS) and OTS.

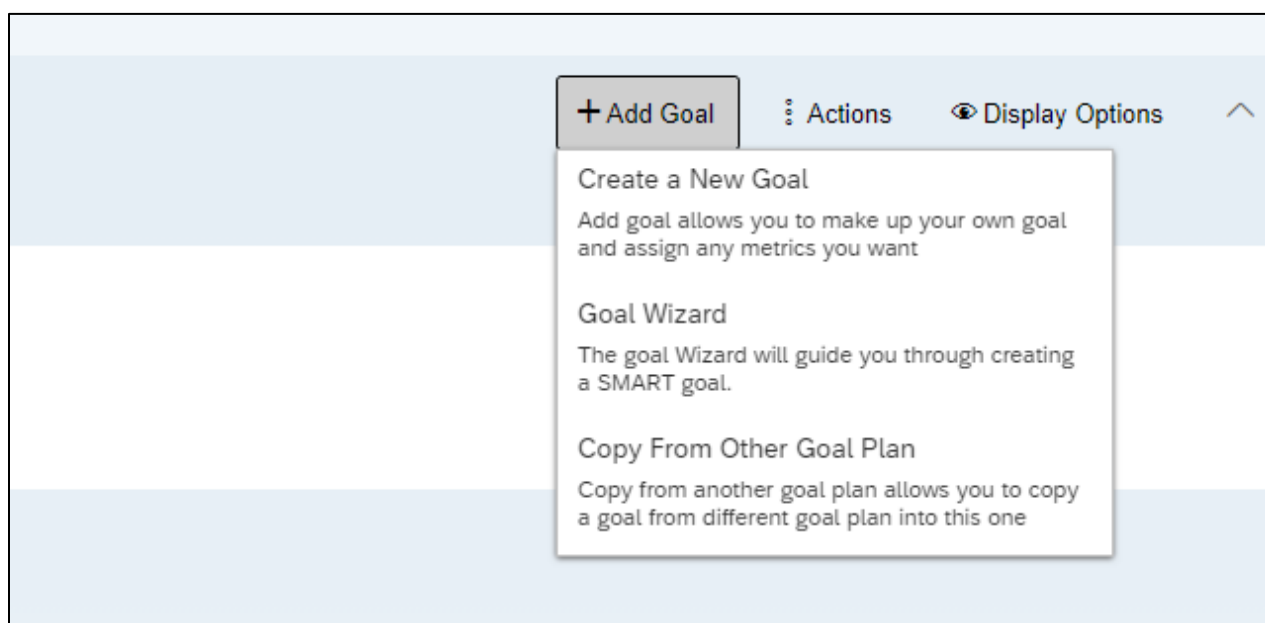
### 4. Click "+ Add Goal" to select the different methods for creating a goal.

This screenshot shows the 'Goals' section of the SAP SuccessFactors Performance form. At the top, there's a search bar and a toolbar with icons for 'Actions', 'History', and document management. Below the toolbar is a large empty area for goals. In the bottom right corner of this area, there's a blue button labeled '+ Add Goal' with a plus icon, which is highlighted with a black circle. Below the main goal area is a section titled 'Model' which displays a grid of competency icons. These icons are color-coded: green for 'Thought' (Groups, Results, Self), blue for 'People' (People, People), and yellow for 'T&C' (Thought & Collaboration). Other icons include 'OA' (Organizational Awareness), 'D' (Values Diversity), 'FE' (Fosters Engagement), and 'C' (Communication). A 'Support' button is visible on the right side of the screen.

## OPTIONS FOR CREATING GOALS

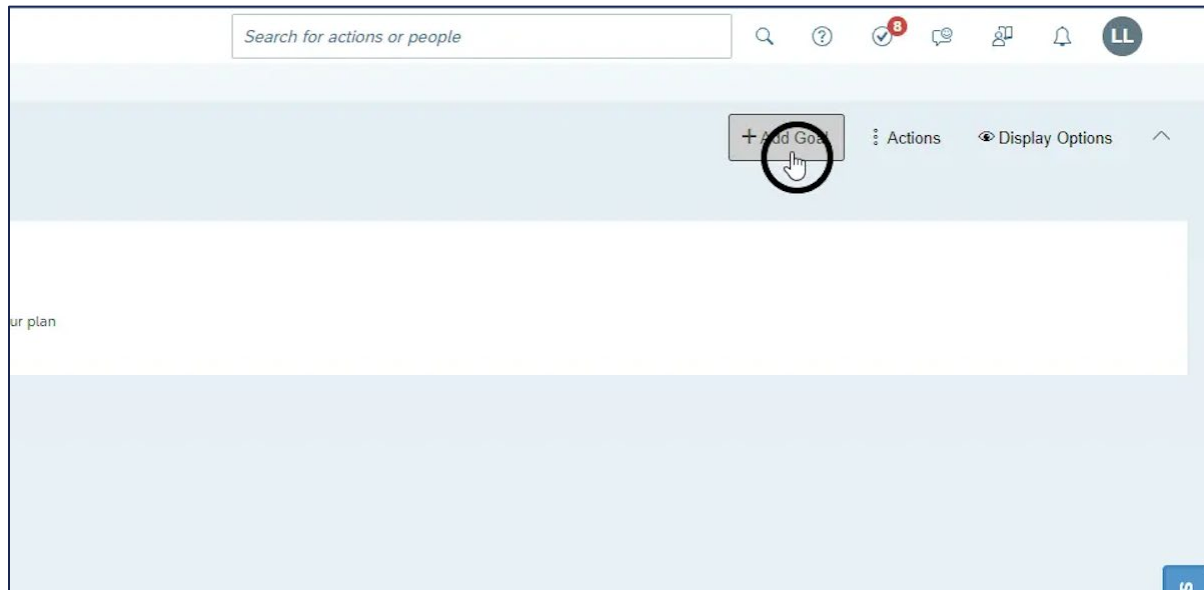
You have 5 options to create a goal for your employee:

1. **Create New Goal – Personal Goal:** This option allows you to make up your own goal and assign any metrics you want.
2. **Create New Goal – Library Goal:** This option allows you select a goal from an organized library with suggested metrics.
3. **Goal Wizard** – This option will guide you through creating a SMART goal.
4. **Copy from Other Goal Plan** – This option 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.
5. **Cascading Goals** – This option allows you to assign the same goal from your Goal Plan to multiple individuals at once.

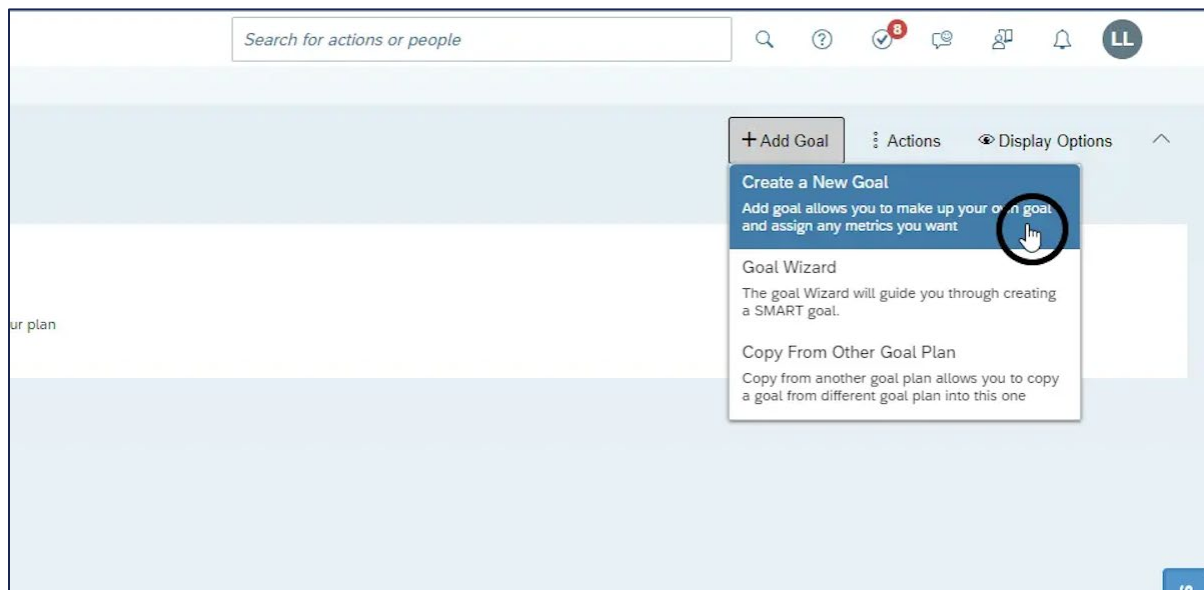


## HOW TO CREATE A PERSONAL GOAL

### 1. Click on "Add Goal" in Goal Plan or on form.



### 2. Click on "Create a New Goal."



### 3. Clicking on "Personal Goal" allows you to make up your own goal and assign any metrics you want.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-fPT376-UwjPX-x4UmwsgAJINvAkj-Bp8rDMFQrg-gQfG0N...

Create a New Goal

Choose what type of goal to add.

- + **Personal Goal**  
Personal Goals allow you to make up your own goal and assign any metrics you want.
- + Library Goal  
Library Goals are selected from an organized library with suggested metrics.

Cancel

Target:

Target Date

Start Date	Due Date
01/01/2022	12/31/2022

### 4. Use drop-down menu to change the goal category.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-8w79pWAvuQFvb\_cK4KDvVRK9W1isGeN\_yU40aPjWeyMk...

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*:

\* How will it be measured?:

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

Cancel Back Save Changes

Compliance

You have no goals in this category.

Professional Development

Start Date	Due Date
01/01/2022	12/31/2022

## 5. Type in the Goal Name.

NOTE: The Goal Name is required.



## 6. Click here to spell check your Goal Name.

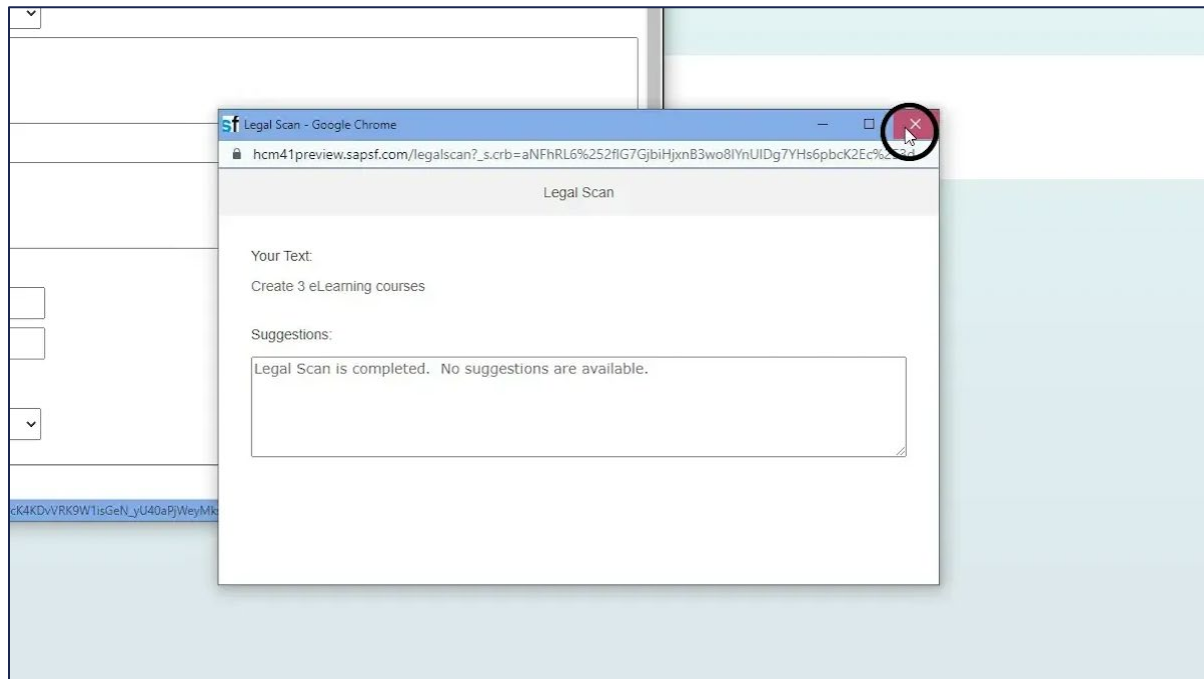
**7. Revise any spelling errors as necessary. Click OK or FINISH to exit dialogue box.**

The screenshot shows the 'Add Goal' dialog box in the SAP SuccessFactors system. A spelling check overlay is visible, indicating that the spelling check is complete. The overlay includes a 'OK' button circled in red. The dialog box contains fields for 'Goal Name', 'How will it be measured?', 'Start Date', 'Due Date', 'Weight', and 'Status'. The 'Goal Name' field is currently empty. The 'How will it be measured?' field contains the text 'learning'. The 'Start Date' field is set to '01/01/2022'. The 'Due Date' field is set to '12/31/2022'. The 'Weight' field is set to '100%'. The 'Status' field is set to 'Not Started'. The 'OK' button is circled in red, indicating it should be clicked to exit the dialog box.

**8. Click here to perform a legal scan of your Goal Name.**

The screenshot shows the 'Add Goal' dialog box in the SAP SuccessFactors system. The 'Goal Name' field is filled with 'Create 3 eLearning courses'. The 'How will it be measured?' field is empty. The 'Start Date' field is set to '01/01/2022'. The 'Due Date' field is set to '12/31/2022'. The 'Weight' field is set to '100%'. The 'Status' field is set to 'Not Started'. The 'OK' button is circled in red, indicating it should be clicked to exit the dialog box. A link labeled 'legal scan...' is visible next to the 'Goal Name' field, indicating where to click to perform a legal scan of the goal name.

9. Click the X to close the legal scan.



10. Click here type a metric that explains how the goal will be measured.

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Create 3 eLearning courses

\* How will it be measured?: I

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

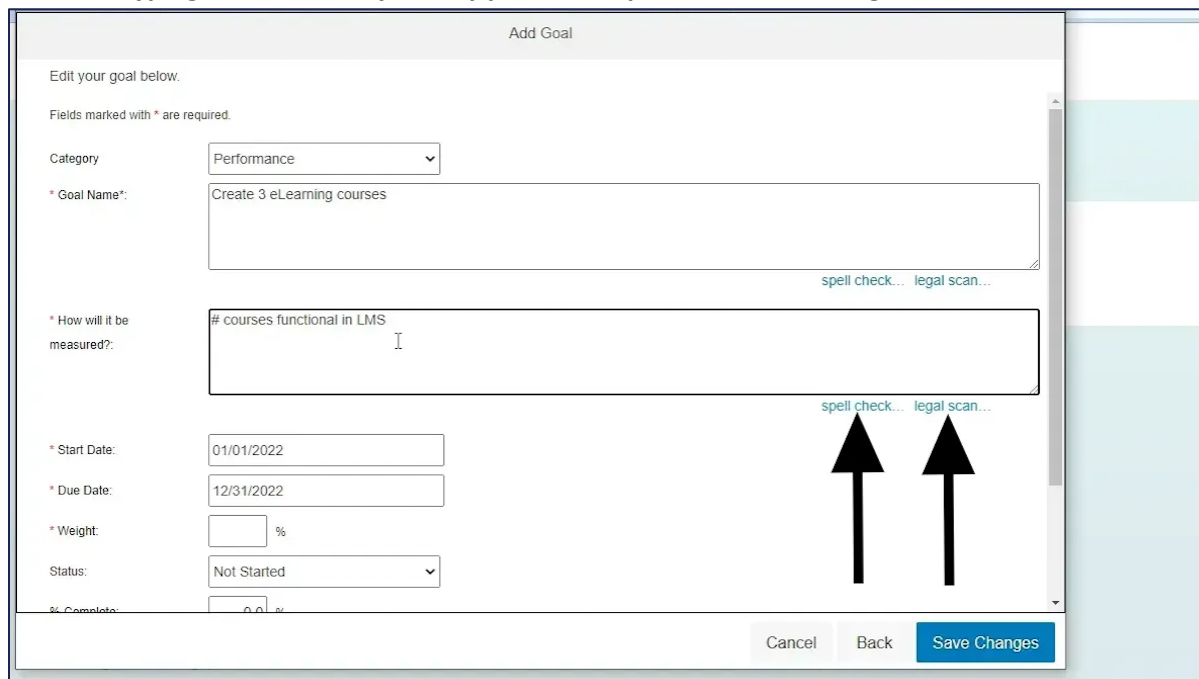
\* Weight: %

Status: Not Started

% Complete: 0.0%

Cancel Back Save Changes

## 11. After typing in the metric, you may perform a spell check and/or legal scan.



**Add Goal**

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Create 3 eLearning courses

spell check... legal scan...

\* How will it be measured?: # courses functional in LMS

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

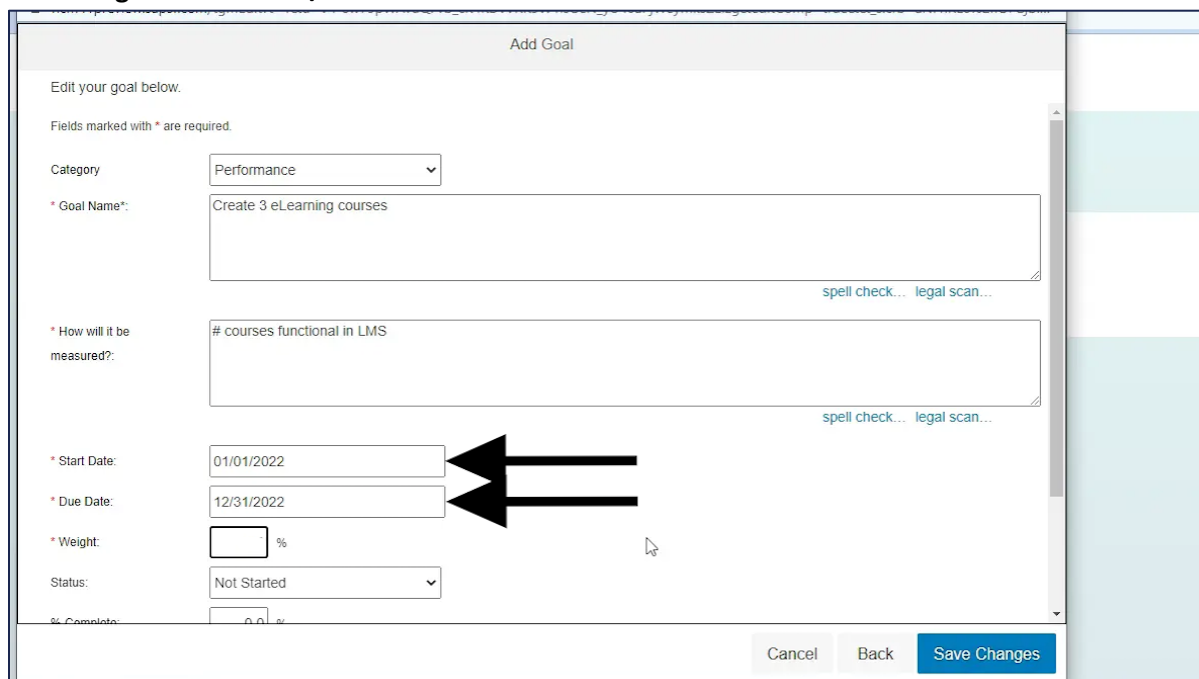
\* Weight: %

Status: Not Started

% Complete: 0.0 %

Cancel Back **Save Changes**

## 12. Change the Start and/or Due Date.



**Add Goal**

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Create 3 eLearning courses

spell check... legal scan...

\* How will it be measured?: # courses functional in LMS

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: %



Status: Not Started

% Complete: 0.0 %

Cancel Back **Save Changes**

### 13. Add the Weight of the goal.

NOTE: The total weight of all of the goals must equal 100%.

**Add Goal**

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Create 3 eLearning courses

# courses functional in LMS

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30 %

Status: Not Started

% Complete: 0.0 %

spell check... legal scan...

Cancel Back Save Changes

### 14. You may change the Status and/or add the % complete. Use the drop-down to select the type of goal.

**Add Goal**

Edit your goal below.

# courses functional in LMS

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30 %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: Department  
Agency  
Section  
Individual

spell check... legal scan...

Cancel Back Save Changes

### 15. Click here add goal targets.

NOTE: Goal targets can be used to break larger goals into milestones and determine deadlines for each target. Targets are not required, but they can help with project and performance management.



\* Start Date:

\* Due Date:

\* Weight:

 %

Status:

Not Started

% Complete:

 %

Type:

Agency

Target:

[+ Add Target](#)

Cancel

Back

Other

You have no goals in this category.

### 16. Type the target name here. Select the Target Date. Click the + to add another target.

\* Start Date:

\* Due Date:

\* Weight:

 %

Status:

Not Started

% Complete:

 %

Type:

Agency

Target:

Target	Target Date	Actual	Action
Course 1	MM/DD/YYYY		+ ↑ ↓

Cancel

Back

Save C

Other

You have no goals in this category.

17. Once you have added all of your targets and other information, save your changes. Your goal has been completed.

Edit your goal below.

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30 %

Status: Not Started

% Complete: 0.0 %

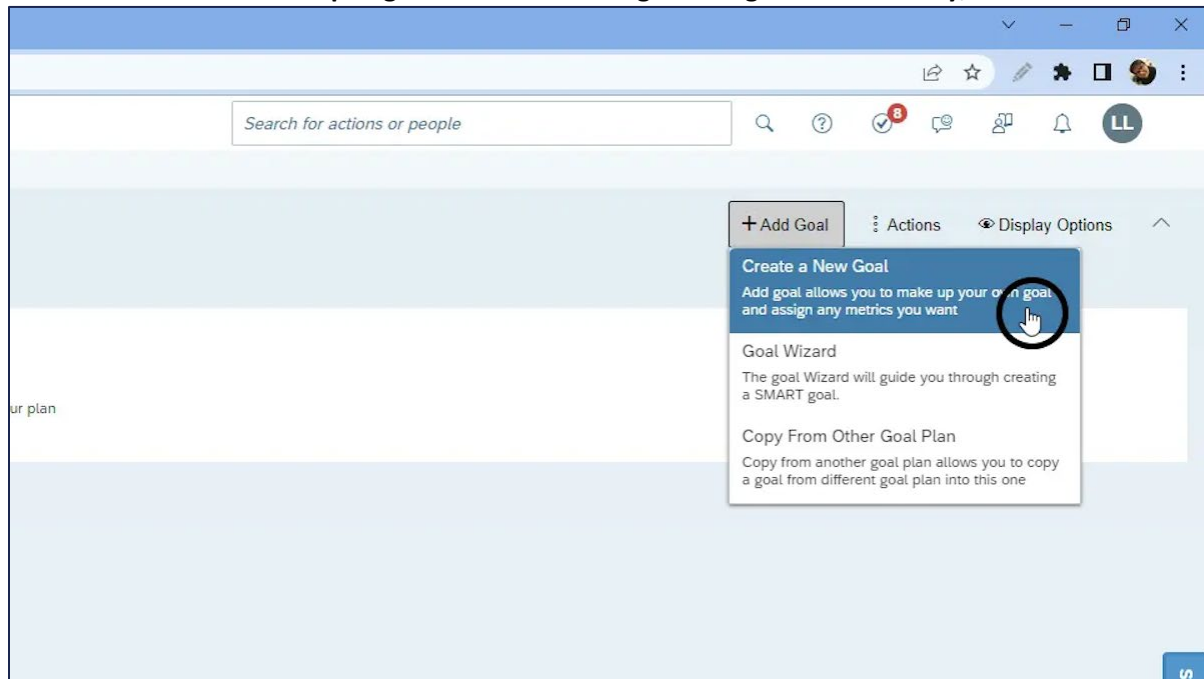
Type: Agency

Target	Target Date	Actual	Action
Course 1	02/01/2023		+ ↑ ↓ ✕
Course 2	04/07/2023		+ ↑ ↓ ✕
Course 3	08/01/2023		+ ↑ ↓ ✕

Cancel Back **Save Changes**

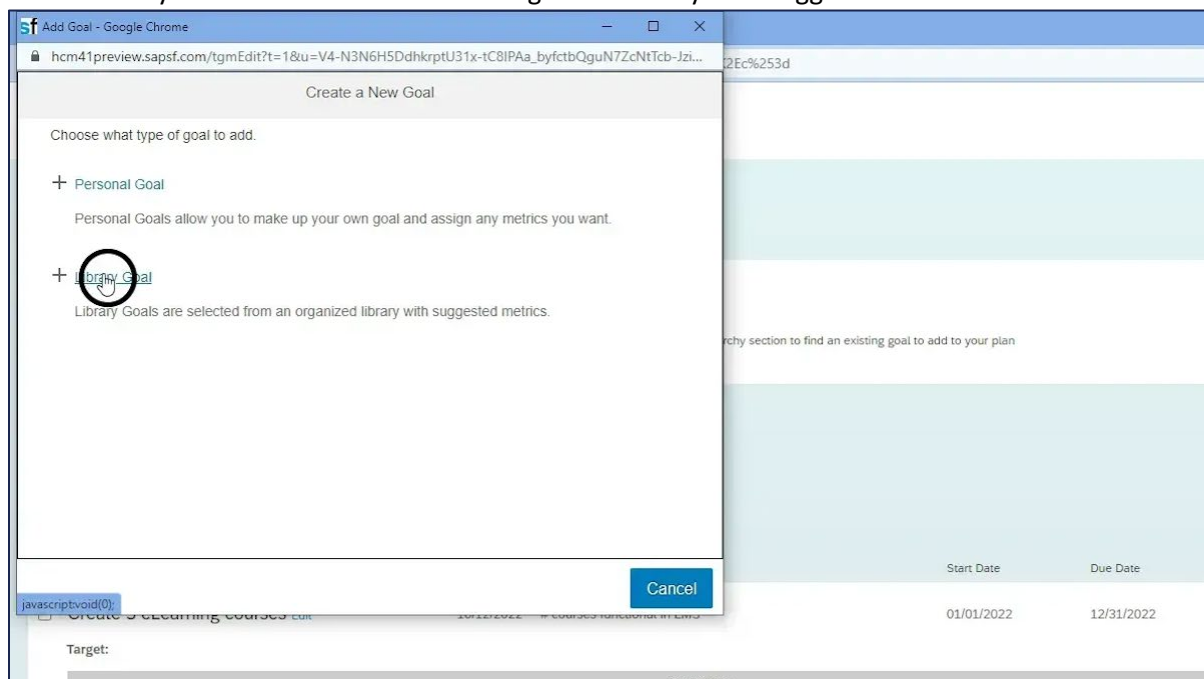
## HOW TO CREATE A LIBRARY GOAL

1. Click "+ Add Goal" to open goal menu. To add a goal using the Goal Library, click "Create a New Goal."

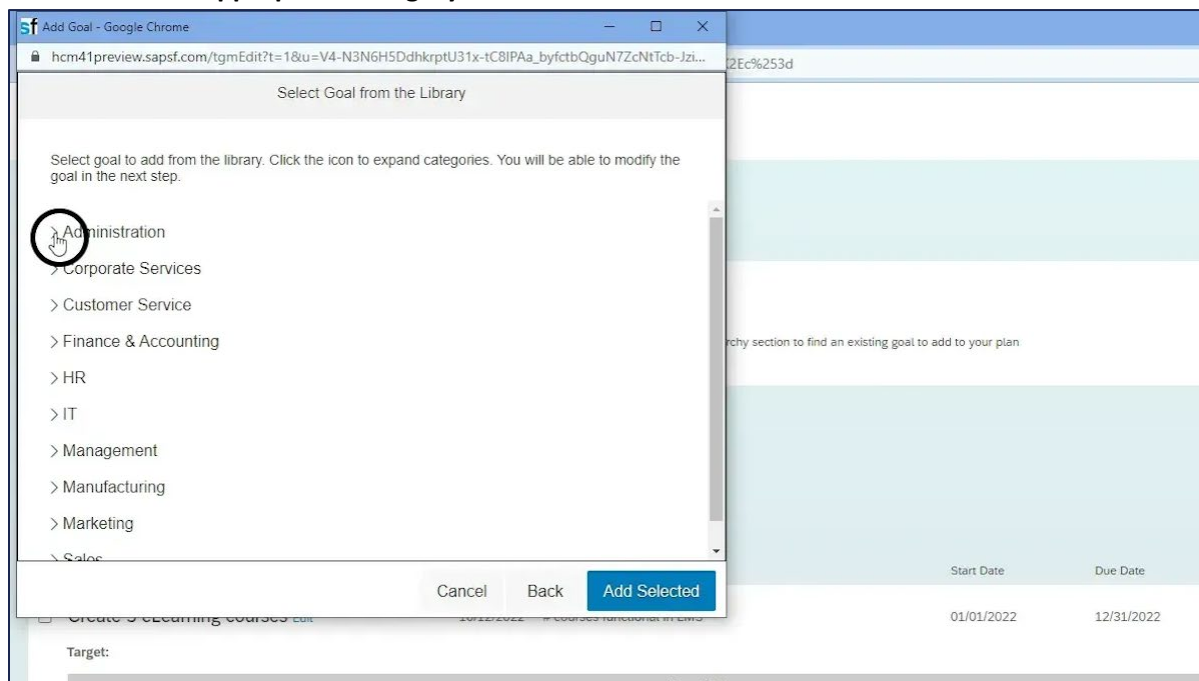


2. Click "Library Goal."

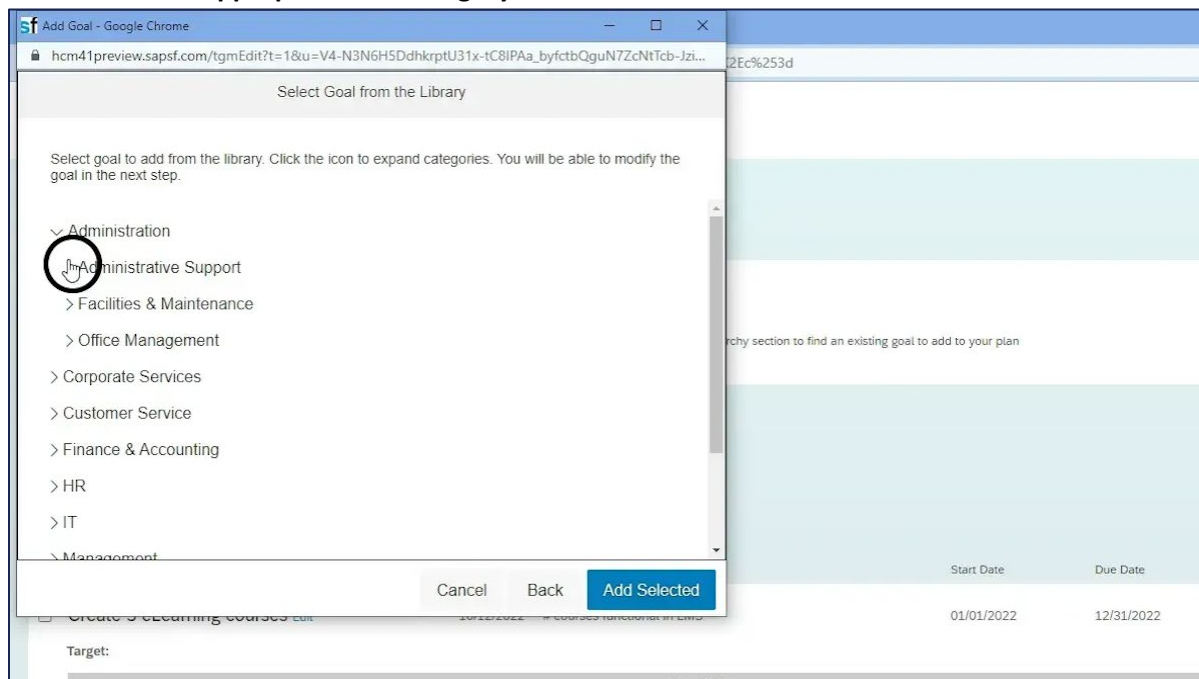
NOTE: Library Goals are selected from an organized library with suggested metrics.



### 3. Click on the appropriate category.



### 4. Click on the appropriate sub-category.



### 5. Click on the box next to the goal you would like to add to your employee's Goal Plan.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-N3N6H5DdhkrptU31x-tC8IPAA\_byfctbQguN7ZcNtTcb-Jzi... 2Ec%253d

Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

<input type="checkbox"/> position in the case of absence	documented
<input type="checkbox"/> By (date), follow all departmental policies and procedures	# of policies and procedures not followed
<input type="checkbox"/> By (date), meet ___% of all agreed upon deadlines	% of deadlines met
<input checked="" type="checkbox"/> Conduct ___(##) training sessions with other administrative personnel on new skills	# of trainings conducted
<input type="checkbox"/> Improve response time to customer requests to (unit of time) by (date)	Average response time to requests
<input type="checkbox"/> Reduce overtime hours ___% by (date)	Overtime reduction rate
<input type="checkbox"/> Reduce the number of documents returned due to incompleteness or errors by (date)	# of returned documents
> Facilities & Maintenance	
> Office Management	
> Corporate Services	

Cancel Back Add Selected Start

### 6. Click here to add the selected goal.

# of training sessions with other administrative personnel on new skills	# of trainings conducted	rchy section to find an existing goal to add to your plan
ponse time to customer requests to (unit of time)	Average response time to requests	
vertime hours ___% by (date)	Overtime reduction rate	
number of documents returned due to mess or errors by (date)	# of returned documents	
aintenance		
ment		
Cancel	Back	Add Selected
Training Courses Edit	10/12/2022	# Courses Functional
	Start Date	Due Date
	01/01/2022	12/31/2022
	Target Date	
	02/01/2023	
	04/07/2023	
	08/01/2023	
LACI L TALLEY 10/12/22 7:38 PM		
ments		

## 7. Use the drop-down to change the goal category. Edit the goal name as needed to create a SMART goal.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-N3N6H5DdhkprtU31x-tC8IPAA\_byfctbQguN7ZcNtTcb-Jzi...

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023

\* How will it be measured?: # of trainings conducted

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

spell check... legal scan...

spell check... legal scan...

Cancel Back Save Changes

Target:

Start Date	Due Date
01/01/2022	12/31/2022

## 8. You can run a spell check and a legal scan on your Goal Name and metric.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-N3N6H5DdhkprtU31x-tC8IPAA\_byfctbQguN7ZcNtTcb-Jzi...

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023

\* How will it be measured?: # of trainings conducted

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

spell check... legal scan...

spell check... legal scan...

Cancel Back Save Changes

Target:

Start Date	Due Date
01/01/2022	12/31/2022

### 9. Change the Start and/or Due Date, if necessary.

\* How will it be measured?: # of trainings conducted

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 0 %

Status: Not Started

Cancel Back Save Changes

### 10. Add the Weight of the goal.

NOTE: The total weight of all goals must equal 100%.

hcm41preview.sapsf.com/tgmEdit?t=1&u=V4-N3N6H5DdhkrptU31x-tC8IPAA\_byfctbQguN7ZcNtTcb-Jzi...

Add Goal

Edit your goal below.

\* Start Date: 01/01/2022

\* Due Date: 10/01/2023

\* Weight: 0 %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: + Add Target

Cancel Back Save Changes



**11. Change the Status, % Complete, Type, and Target(s), as needed. Click Save Changes to add the goal to the Goal Plan.**

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 10/01/2023

\* Weight: 30 %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: + Add Target

Cancel Back **Save Changes**

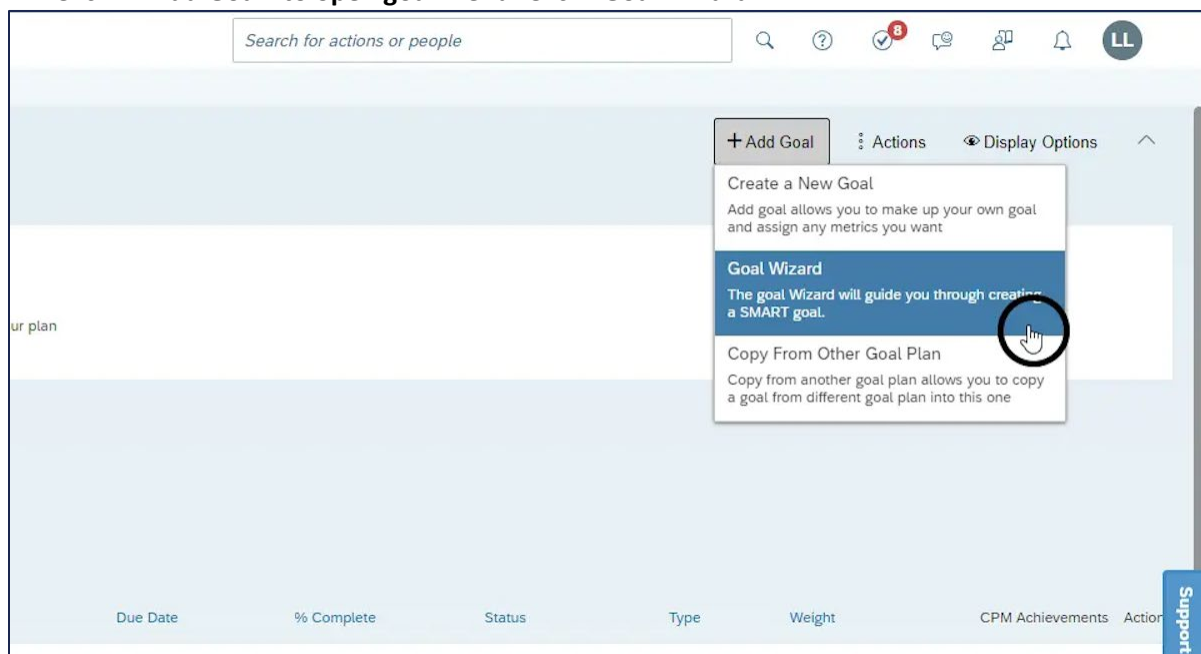
	Start Date	Due Date
	01/01/2022	12/31/2022

Target:

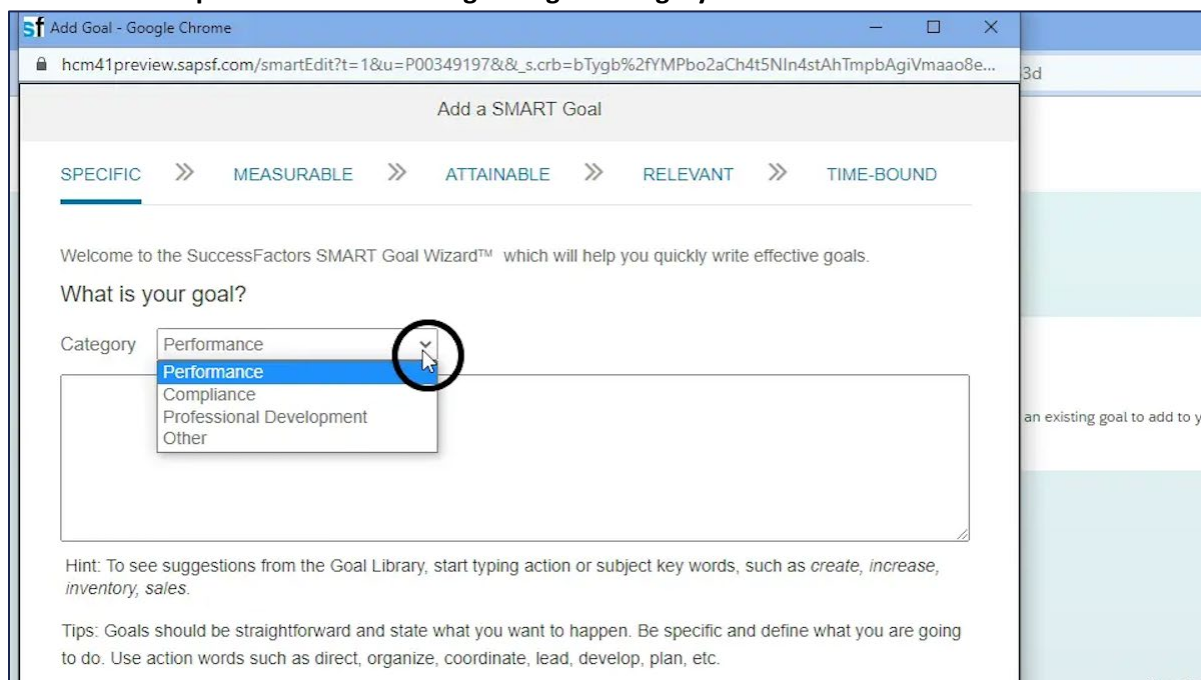
	Target Date
Course 1	02/01/2023
Course 2	04/03/2023

## HOW TO USE THE GOAL WIZARD

### 1. Click "+ Add Goal" to open goal menu. Click "Goal Wizard."



### 2. Use the drop-down menu to change the goal category.



### 3. Type in a word or phrase related to the topic/goal you want to create.

hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nln4stAhTmPbAgIVmaao8e...

### Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.

What is your goal?

Category: Professional Development

Attend

Become more proficient with computer software by attending \_\_\_ (#) of training courses per (time period)  
 Attend \_\_\_ (#) of seminars, conferences and/or trainings during (time frame) to keep professional skills up to date  
 Attend a training in performance management soft skills by (date)

Cancel Next

Target:

Target Date

Start Date Due Date

01/01/2022 12/31/2022

### 4. Select the appropriate goal.

hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nln4stAhTmPbAgIVmaao8e...

### Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.

What is your goal?

Category: Professional Development

Attend

Become more proficient with computer software by attending \_\_\_ (#) of training courses per (time period)  
 Attend \_\_\_ (#) of seminars, conferences and/or trainings during (time frame) to keep professional skills up to date  
 Attend a training in performance management soft skills by (date)

Cancel Next

Target:

Target Date

Start Date Due Date

01/01/2022 12/31/2022

## 5. Edit the goal appropriately.

hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nn4stAhTmbAgivmaao8e...

### Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.

What is your goal?

Category: Professional Development

Attend 1 seminar, conferences and/or trainings during (time frame) to keep professional skills up to date

Hint: To see suggestions from the Goal Library, start typing action or subject key words, such as *create, increase, inventory, sales*.

Tips: Goals should be straightforward and state what you want to happen. Be specific and define what you are going to do. Use action words such as *direct, organize, coordinate, lead, develop, plan, etc.*

Cancel Next

Target:

Target	Target Date
Course 1	02/01/2023

## 6. After you have edited the goal, click "Next."

sf Add Goal - Google Chrome

hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nn4stAhTmbAgivmaao8e...

### Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Welcome to the SuccessFactors SMART Goal Wizard™ which will help you quickly write effective goals.

What is your goal?

Category: Professional Development

Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

Hint: To see suggestions from the Goal Library, start typing action or subject key words, such as *create, increase, inventory, sales*.

Tips: Goals should be straightforward and state what you want to happen. Be specific and define what you are going to do. Use action words such as *direct, organize, coordinate, lead, develop, plan, etc.*

Cancel Next

Target:

Target	Target Date
Course 1	02/01/2023

## 7. Edit the metric for measuring this goal, if necessary. Click "Next."

hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nln4stAhTmPbAgIVmaao8e...

### Add a SMART Goal

SPECIFIC >> **MEASURABLE** >> ATTAINABLE >> RELEVANT >> TIME-BOUND

Goal: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

How will you measure this goal?

# of events attended

Tips: If you can't measure it, you can't manage it. Choose goals with measurable progress and establish concrete criteria for measuring the success of your goal.

Cancel Back **Next**

Target:

Target Date
02/01/2023

Course 1

## 8. Answer the question: "Is this goal attainable?" If you answer "Yes," click "Next."

NOTE: If you answer no, you will not be allowed to advance. You must either click "Back" to revise the goal or you may click "Cancel" and exit the wizard.



hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fYMPbo2aCh4t5Nln4stAhTmPbAgIVmaao8e...

### Add a SMART Goal

SPECIFIC >> MEASURABLE >> **ATTAINABLE** >> RELEVANT >> TIME-BOUND

Goal: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

How will it be measured?: # of events attended

Is this goal attainable?

☒ Yes ☐ No

Tips: Goals must be within your capacity to reach. If goals are set too far out of your reach, you cannot commit to accomplishing them. Goals need to stretch you slightly so you feel you can do it and it will need a real commitment from you. Success in reaching attainable goals keeps you motivated.

Cancel Back **Next**

Target:

Target Date
02/01/2023

Course 1

## 9. Answer the question: "Is this goal relevant?" If you answer "Yes," click "Next."

NOTE: If you answer no, you will not be allowed to advance. You must either click "Back" to revise the goal or you may click "Cancel" and exit the wizard.



hcm41preview.sapsf.com/smartEdit?t=1&u=P00349197&&s\_crb=bTygb%2fyMPbo2aCh4t5Nin4stAhTimpbAgiVmaao8e...

Add a SMART Goal

SPECIFIC >> MEASURABLE >> ATTAINABLE >> **RELEVANT** >> TIME-BOUND

Goal: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

How will it be measured?: # of events attended

Is this goal relevant?

☐ No ☒ Yes

Tips: Goals should be relevant. Make sure each goal is consistent with your other goals and aligned with the goals of the company, your manager, or your department.

Cancel Back **Next**

Target:

Start Date	Due Date	% Complete
01/01/2022	12/31/2022	

Course 1 Target Date 02/01/2023

## 10. Edit your goal and metric, if necessary. You can also adjust the Start and/or Due Date.

Edit your goal below.

Fields marked with \* are required.

Category: Professional Development

\* Goal Name\*: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

\* How will it be measured?: # of events attended

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: + Add Target

## 11. Add the weight of the goal here.

NOTE: The total weight of all goals must equal 100%.

Fields marked with \* are required.

Category: Professional Development

\* Goal Name\*: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

spell check... legal scan...

\* How will it be measured?: # of events attended

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 15 %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: + Add Target

Due Date: 12/31/2022



## 12. Change the Status and the % Complete, if necessary.

Edit your goal below.

Fields marked with \* are required.

Category: Professional Development

\* Goal Name\*: Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date

spell check... legal scan...

\* How will it be measured?: # of events attended

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 15 %

Status: Not Started

% Complete: 0.0 %

Type: Department

Target: + Add Target

Due Date: 12/31/2022

**13. Change the Type of goal and add Targets, if necessary. Click "Save & Close" to add your goal to the Goal Plan.**

The screenshot displays the SAP SuccessFactors goal management interface. The form contains the following fields and values:

- \* Goal Name\*:** Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date
- \* How will it be measured?:** # of events attended
- \* Start Date:** 01/01/2022
- \* Due Date:** 12/31/2022
- \* Weight:** 15 %
- Status:** Not Started
- % Complete:** 0.0 %
- Type:** Department
- Target:** + Add Target

At the bottom of the form, there are three buttons: Cancel, Back, and Save & Close. The 'Save & Close' button is circled with a hand cursor icon. Two large black arrows point to the 'Type' dropdown menu and the '+ Add Target' link. On the right side of the interface, a sidebar shows a 'Due Date' field with the value '12/31/2022'.

## COPYING GOALS FROM PREVIOUS GOAL PLAN

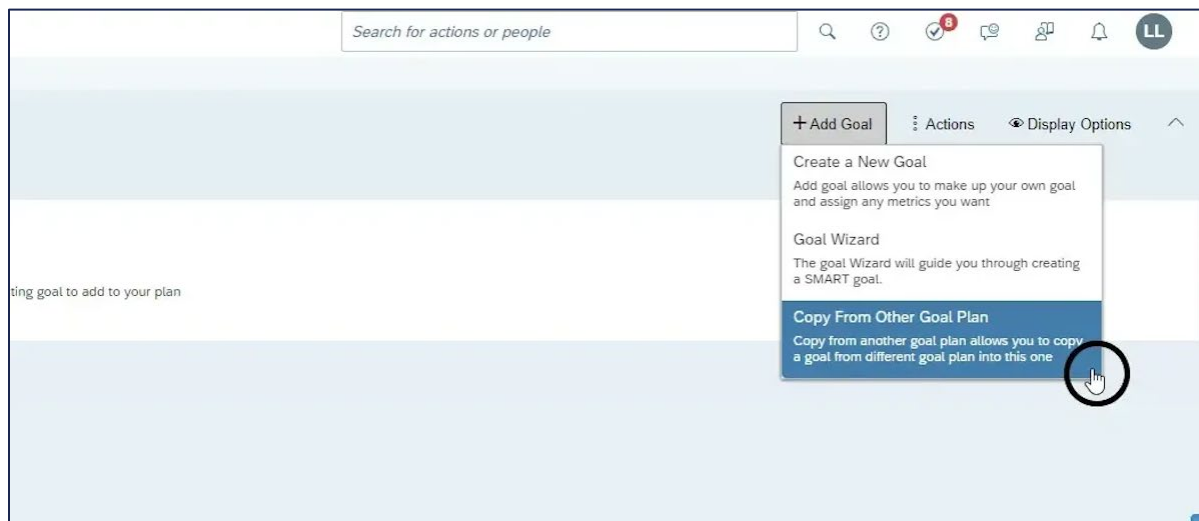
SuccessFactors allows you to copy goals created in the previous year for an employee.



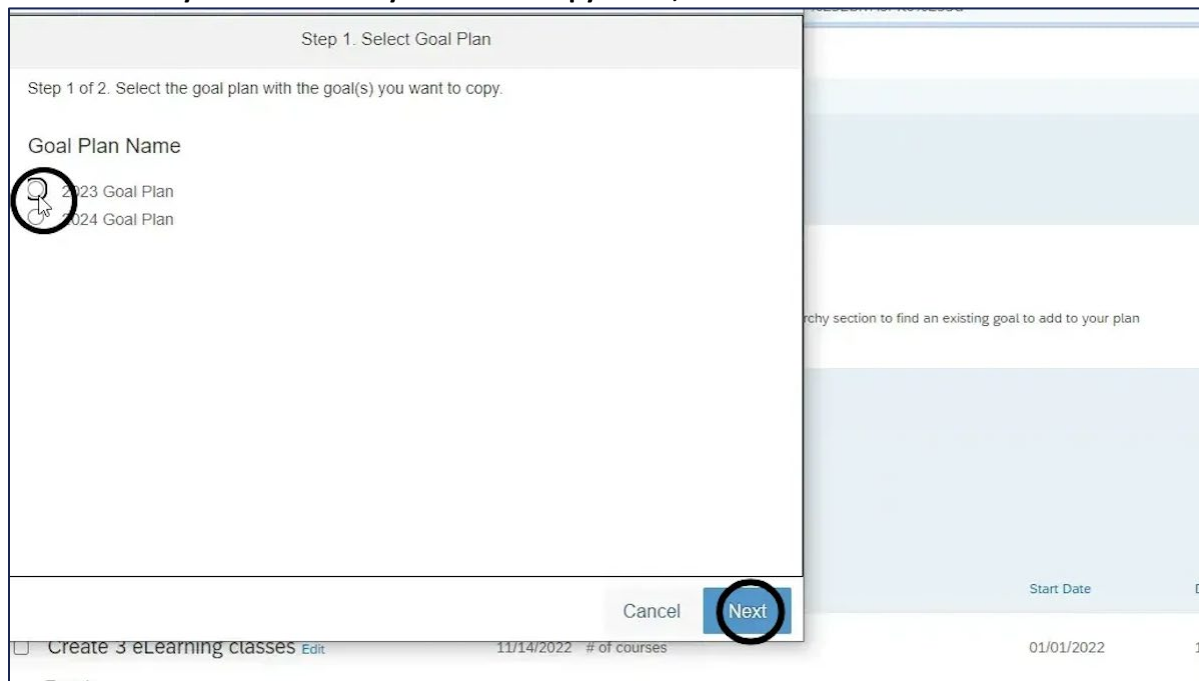
SF NOTES =

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

1. Click "+ Add Goal" to open goal menu. To add a goal using the Goal Library, click "Copy From Other Goal Plan."



2. Select the year from which you want to copy. Then, click "Next."



### 3. Select the goal you want to copy. Then, click "Copy."

Step 2: Select Goal

Step 2 of 2: Select Goal

Goals

Total Weight: 0.0% ⚠️ Min: 100.0%  
(Min:2) ⚠️ Minimum Not Met

Performance  
You have no goals in this category.

Compliance  
You have no goals in this category.

Professional Development  
You have no goals in this category.

Other  
You have no goals in this category.

Cancel Back Copy

Start Date Due Date

01/01/2022 12/31/2022

Create 3 eLearning classes Edit 11/14/2022 # of courses

Target:

## CASCADING GOALS TO EMPLOYEES

Cascading goals is the term used in SuccessFactors to assign the same goal to multiple individuals at once.



### SF NOTES:

- *The goal must appear on your Goal Plan for you to cascade it.*
- *Cascading goals is limited to the people who roll up to you. Thus, it is crucial that your agency's organization management is up to date.*
- *Your Goal Plan and your subordinates' Goal Plans must be UNAPPROVED to cascade goals. The Cascade button will not appear if your Goal Plan is APPROVED.*
- *After you cascade goals, you may edit the Goal Name in an employee's Goal Plan as long as it is UNAPPROVED.*

### 1. Navigate to your Goal Plan.

The screenshot shows the SAP SuccessFactors Goals interface. At the top, there's a navigation bar with 'SAP SuccessFactors' and a 'Goals' dropdown. Below this, there are two tabs: 'Goal Plan' (selected) and 'Goal Alignment Chart'. The 'Goal Plan' tab displays a user profile icon, a dropdown menu, and a '2023 Goal Plan' dropdown. Below these, the 'Goal Status: Unapproved' is highlighted with a large black arrow. Underneath, there's an 'Introduction' section with a sub-header and a paragraph of text. At the bottom, there's a section for 'Performance' with a table header showing 'Goal Name', 'Last Modified', and 'How will it be measured?'.

## 2. Select the goal(s) you would like to cascade.

NOTE: You may select multiple goals to cascade at once.

Goal Status: **Unapproved**

▼ Introduction

Use this worksheet to add or update goals. To quickly add a new goal, click the "Create a New Goal" button, or browse the hierarchy section to find an existing goal to add to your plan

Displaying 1–4 of 4 Goals


**Total Weight: 100.0%**  
(Min:2)

**Performance**

Goal Name*	Last Modified	How will it be measured?	Start Date
Create 17 PMGM video tutorials for statewide Use 12/1/2022 <a href="#">Edit</a>	10/20/2022	# of classes completed	01/01/2022

Alert - Created by GLYN D HAYS 10/20/22 7:01 PM [clear alert](#)


▼ Comments




Comment

## 3. Click the "Actions" button at the top right.


Search for actions or peo...

 [Display Options](#)

existing goal to add to your plan

Start Date	Due Date	% Complete	Status	Type	Weight	CPM Achievements	Action
01/01/2022	12/31/2022	<div><div></div></div> 0.0%	Not Started	Agency	<div><div></div></div> 50.0%	0	

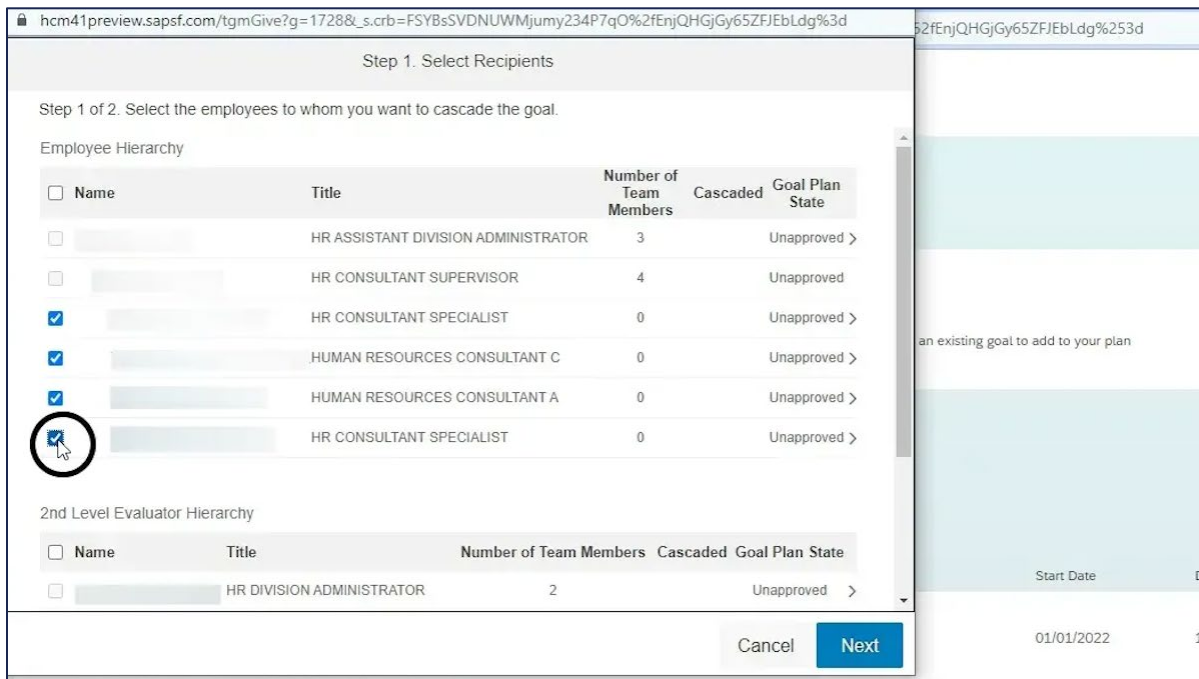
#### 4. Click "Cascade."



The screenshot shows the SAP SuccessFactors interface. In the top right corner, there is an 'Actions' menu with a dropdown arrow. The 'Cascade' option is highlighted with a blue bar and a mouse cursor icon. Below the 'Cascade' option is the option 'Print to HTML or PDF'. The main area of the screen shows a table with columns: Start Date, Due Date, % Complete, Status, Type, Weight, CPM Achievements, and Action. The first row of data shows: 01/01/2022, 12/31/2022, 0.0%, Not Started, Agency, 50.0%, 0, and a 'Support' button.

#### 5. Select all of the employees to whom you would like to cascade the goal.

NOTE: Some boxes are greyed out. You cannot cascade up the chain of command or outside of your reports. Also, you cannot cascade goals if the Goal Plan State is Approved.

The screenshot shows the 'Step 1. Select Recipients' dialog box in SAP SuccessFactors. The dialog box has a title bar with the URL 'hcm41preview.sapsf.com/tgmGive?g=1728&s\_crb=FSYBsSVDNUWMjummy234P7qO%2fEnjQHGjGy65ZFJEbLdg%3d'. The main content area is titled 'Step 1 of 2. Select the employees to whom you want to cascade the goal.' and 'Employee Hierarchy'. It contains a table with columns: Name, Title, Number of Team Members, Cascaded, and Goal Plan State. The table lists five employees, with the last one selected. Below the table is a section for '2nd Level Evaluator Hierarchy' with a table listing one evaluator. At the bottom of the dialog box are 'Cancel' and 'Next' buttons.

Name	Title	Number of Team Members	Cascaded	Goal Plan State
<input type="checkbox"/>	HR ASSISTANT DIVISION ADMINISTRATOR	3		Unapproved >
<input type="checkbox"/>	HR CONSULTANT SUPERVISOR	4		Unapproved
<input checked="" type="checkbox"/>	HR CONSULTANT SPECIALIST	0		Unapproved >
<input checked="" type="checkbox"/>	HUMAN RESOURCES CONSULTANT C	0		Unapproved >
<input checked="" type="checkbox"/>	HUMAN RESOURCES CONSULTANT A	0		Unapproved >
<input checked="" type="checkbox"/>	HR CONSULTANT SPECIALIST	0		Unapproved >

Name	Title	Number of Team Members	Cascaded	Goal Plan State
<input type="checkbox"/>	HR DIVISION ADMINISTRATOR	2		Unapproved >

## 6. After you have selected all employees, click "Next."

Step 1. Select Recipients

Step 1 of 2. Select the employees to whom you want to cascade the goal.

<input type="checkbox"/>		HR CONSULTANT SUPERVISOR	4	Unapproved
<input checked="" type="checkbox"/>		HR CONSULTANT SPECIALIST	0	Unapproved >
<input checked="" type="checkbox"/>		HUMAN RESOURCES CONSULTANT C	0	Unapproved >
<input checked="" type="checkbox"/>		HUMAN RESOURCES CONSULTANT A	0	Unapproved >
<input checked="" type="checkbox"/>		HR CONSULTANT SPECIALIST	0	Unapproved >

2nd Level Evaluator Hierarchy

<input type="checkbox"/>	Name	Title	Number of Team Members	Cascaded	Goal Plan State
<input type="checkbox"/>		HR DIVISION ADMINISTRATOR	2		Unapproved >
<input type="checkbox"/>		HR CONSULTANT SUPERVISOR	4		Unapproved

Other Employees [Find Other Employees](#)

Cancel **Next**

Alert - Created by GLYN D HAYS 10/20/22 7:01 PM [clear alert](#)

## 7. Edit the goal. You may edit the Category, Weight, Status, % Complete, Type, and Target, if necessary.

NOTE: If you are cascading multiple goals, you can scroll down and edit EACH goal. You can also edit these fields in the individual goal plans, after the cascade is complete.



spell check... legal scan...

\* How will it be measured?:

spell check... legal scan...

\* Start Date:

\* Due Date:

\* Weight:  %

Status:

% Complete:  %

Type:

Cancel Back **Cascade**

Alert - Created by GLYN D HAYS 10/20/22 7:01 PM [clear alert](#)

Comments

## 8. Click "Cascade" to complete the process.

Step 2. Edit Goal

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

measured?:

spell check... legal scan...

\* Start Date:

\* Due Date:

\* Weight:  %

Status:  ▼

% Complete:  %

Type:  ▼

Target: [+ Add Target](#)

Cancel Back **Cascade**

Alert - Created by GLYN D HAYS 10/20/22 7:01 PM [clear alert](#)

## 9. When the confirmation pops up, click "OK."

hcm41preview.sapsf.com says  
Congratulations! You have cascaded your goals successfully.

OK

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

measured?:

spell check... legal scan...

\* Start Date:

\* Due Date:

\* Weight:  %

Status:  ▼

% Complete:  %

Type:  ▼

Target: [+ Add Target](#)

Cancel Back **Cascade**

**10. In your Goal Plan, under the goal and comments, you will see a list of employees to whom the goal was cascaded.**


Goal Plan Goal Alignment Chart

☐ Create 17 PMGM video tutorials for statewide use 12/1/2022 [Edit](#)


10/20/2022 # of classes completed 01/01/2022 12/31/2022

Alert - Created by [redacted] 10/20/22 7:01 PM [clear alert](#)

▼ Comments




Comment




Goal aligned down to [redacted]  
Create 17 PMGM video tutorials for statewide use 12/1/2022

10/20/2022 # of classes completed 01/01/2022 12/31/2022




Goal aligned down to [redacted]  
Create 17 PMGM video tutorials for statewide use 12/1/2022

10/20/2022 # of classes completed 01/01/2022 12/31/2022



Goal aligned down to [redacted]  
Create 17 PMGM video tutorials for statewide use 12/1/2022

10/20/2022 # of classes completed 01/01/2022 12/31/2022



Goal aligned down to [redacted]  
Create 17 PMGM video tutorials for statewide use 12/1/2022

10/20/2022 # of classes completed 01/01/2022 12/31/2022

## USING COMMENTS IN GOAL PLANS

**WHAT:** The “Comment” field allows you and/or your employee to include additional information about the goal created.

**WHEN:** Use this feature to provide additional instruction and guidance to your employee. You can, also, use this to create an opportunity to open a dialogue between you and your employee about the goal prior to its approval.

**WHY:** Using this tool allows you to collaborate with your employee on their goals, which can increase employee engagement and facilitate employee development.

**SF NOTES:** *You and your employee can comment on goals, edit comments and/or delete comments as long as the Goal Plan is **Unapproved**.*



**Type your comment in the Comments section. Click on “Post” to add your comment to the Goal Plan.**

Performance

Goal Name*	Last Modified	How will it be measured?	Start Date	Due Date	% Complete	Status	Type	Weight	CPM Achievements	Action
<input type="checkbox"/> Create 3 eLearning courses <a href="#">Edit</a>	10/13/2022	# courses functional in LMS	01/01/2022	12/31/2022	<div><div></div></div> 20.0%	On Track	Agency	<div><div></div></div> 30.0%	0	

Target:

	Target Date	Actual
Course 1	02/01/2023	1
Course 2	04/07/2023	
Course 3	08/01/2023	

Alert - Created by 10/12/22 7:38 PM

▼ Comments

These classes are part of the new onboarding program. You will collaborate with C. Smith in HR will be the subject matter expert for this project.

## UPDATING GOALS IN THE GOAL PLAN

### 1. Click "Edit" to open the Edit Goal window.

Goal Status: **Unapproved**

Introduction

Use this worksheet to add or update goals. To quickly add a new goal, click the "Create a New Goal" button, or browse the hierarchy section to find an existing goal to add to your plan

Displaying 1–3 of 3 Goals

Total Weight: 100.0%  
(Min: 2)

Performance

Goal Name*	Last Modified	How will it be measured?	Start Date
Goal aligned up from [redacted] Create 17 PMGM video tutorials for statewide use 12/1/2022	10/20/2022	# of classes completed	01/01/2022
<input type="checkbox"/> Create 7 PMGM video tutorials for statewide use 12/1/2022 <b>Edit</b>	10/20/2022	# of classes completed	01/01/2022

Alert - Linked by [redacted] 10/20/22 7:49 PM

### 2. Edit the goal fields, if necessary.

NOTE: If you cascaded a goal, but you want to edit the Goal Name, you must do so before the Goal Plan is approved.



Edit Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance

\* Goal Name\*: Create 5 PMGM video tutorials for statewide use 12/1/2022  
spell check... legal scan...

\* How will it be measured?: # of classes completed  
spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

Cancel Save Changes

### 3. Click "Save Changes" after editing.

sf Edit Goal - Google Chrome

hcm41preview.sapsf.com/tgmEdit?g=1747&editComp=true&tt=1&&s\_crb=IXGFRCZs3io4Ar98%2bF8ac...

Personal

01:12:01 • Clo

BTBkJOiZs%253d#url\_fragment\_1747

Edit Goal

Edit your goal below.

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 75.0 %

Status: Not Started

% Complete: 0.0 %

Type: Agency

Target: + Add Target

Cancel Save Changes

rchy section to find an existing goal to add to your plan

Start Date

## WORKING IN THE GOAL PLAN

While the form is **UNAPPROVED**, you can continue to work in the goal plan. The changes you make in the Goal Plan will be reflected on the form.

## AVAILABLE ACTIONS

### 1. Click on the three dots under "Action."

Cancel Post

	Due Date	% Complete	Status	Type	Weight	CPM Achievements	Action
22	12/31/2022	0.0%	Not Started	Department	20.0%	0	

Support

## 2. From here, you can edit the goal or view goal detail.

NOTE: Available actions depend on where the form is in the Route Map. Once the Goal Plan is Approved, goals and/or forms may not be deleted, except by the Agency Administrator.



Due Date	% Complete	Status	Type	Weight	CPM Achievements	Action
12/31/2022	0.0%	Not Started	Department	20.0%	0	<a href="#">Edit goal</a> <a href="#">View goal detail</a> <a href="#">Delete goal</a>

## 1. If you choose to delete the goal, select OK on the confirmation.

hcm41preview.sapsf.com says

Are you sure you want to delete this Goal?

[OK](#) [Cancel](#)

Start Date	Due Date	% Complete	Status	Type
01/01/2022	12/31/2022	0.0%	Not Started	Department

## PERFORMANCE MANAGEMENT

### PERFORMANCE MANAGEMENT FORMS

All performance management forms are launched by your Agency Administrator. Any goals added to a Goal Plan will automatically appear on the form. Once the form is launched, only the Agency Administrator can delete the form or launch a new form.

You can edit the Goal Plan, the goals, and the competencies as long as the Goal Plan is UNAPPROVED. Once the form is sent to the 2<sup>nd</sup> Level Evaluator, the Goal Plan is locked. If the form is returned to the Evaluating Supervisor, the Goal Plan and form are unlocked and may be edited.



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

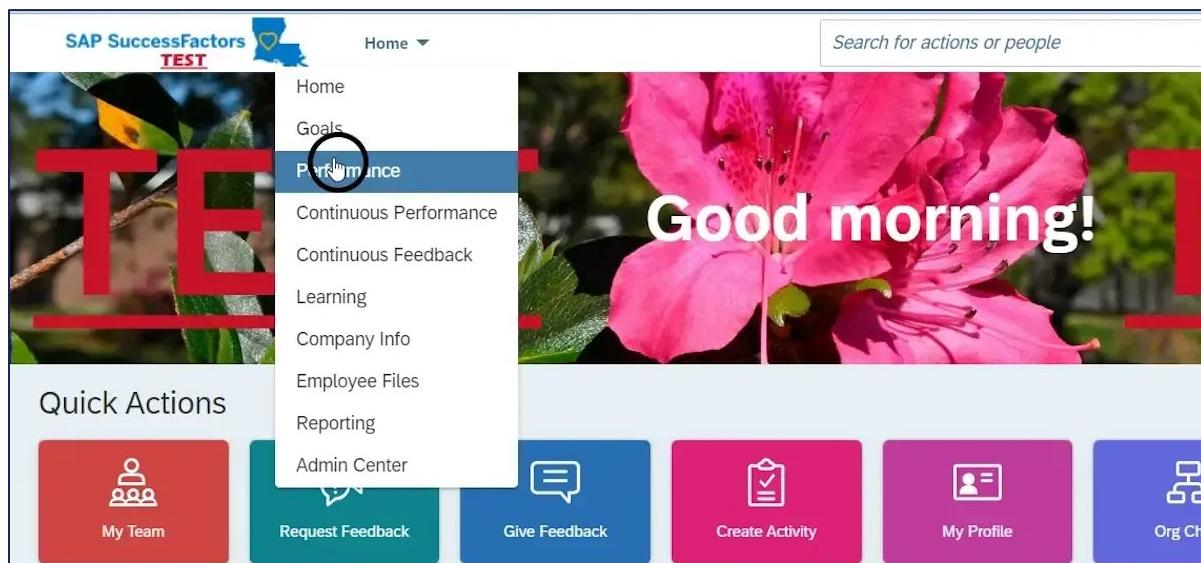
### OTHER PERFORMANCE MANAGEMENT FORMS

Your Agency Administrator launches all available forms for your agency. In addition to the standard performance management form, your Agency Administrator can also launch:

- **Not Evaluated Employee Form** – This form is used when the employee is active as of January 1st of the evaluating year AND has worked less than 3 calendar months within the performance evaluation year AND the appointing authority determines that not enough time has elapsed to accurately rate the employee.
- **New Appointment Performance Planning and Evaluation Form** – This form is used when an employee begins an appointment after the performance year has started.
- **Performance Improvement Tool** is used to establish communication and document areas that require further performance development to reach expectations or achieve stated goals in the performance plan. This form may also reflect an agreement between supervisor and employee on the plan for development and may also be used as supporting documentation to the overall performance evaluation to show the steps taken to enhance performance.

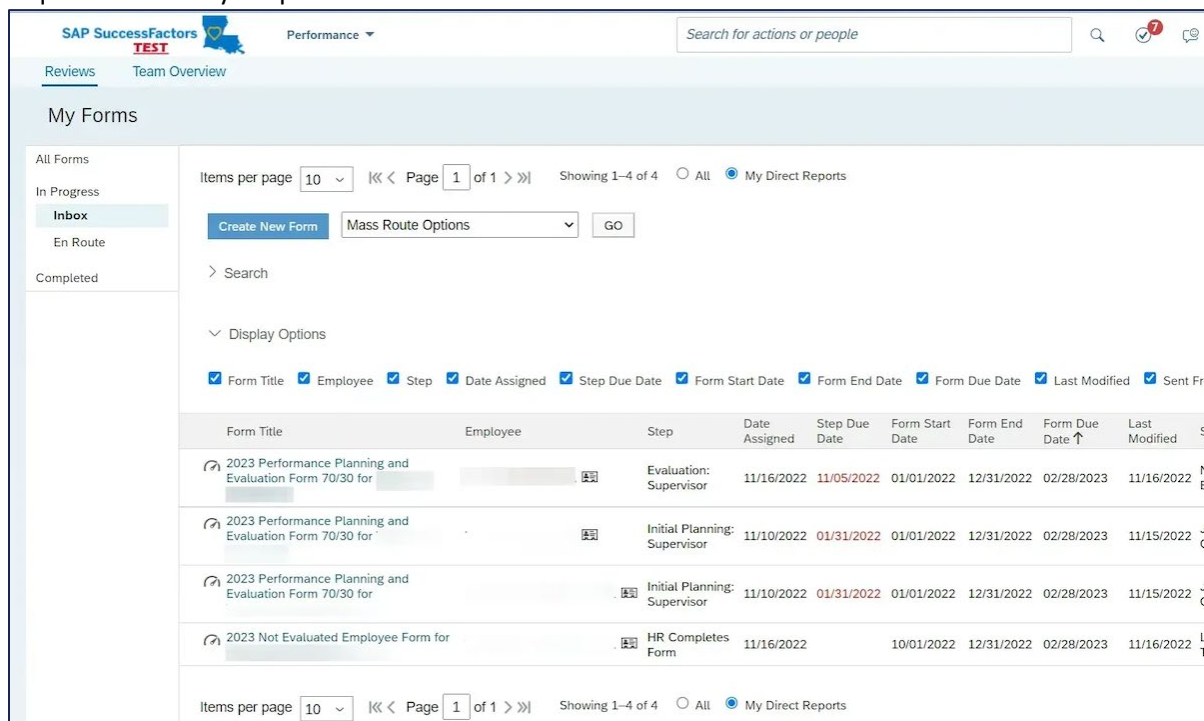
## NAVIGATING YOUR PERFORMANCE / MY FORMS PAGE

### 1. Click on “Performance” from 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.



3. Using the left sidebar, you may also view "All Forms," forms "En Route," and "Completed" Forms.

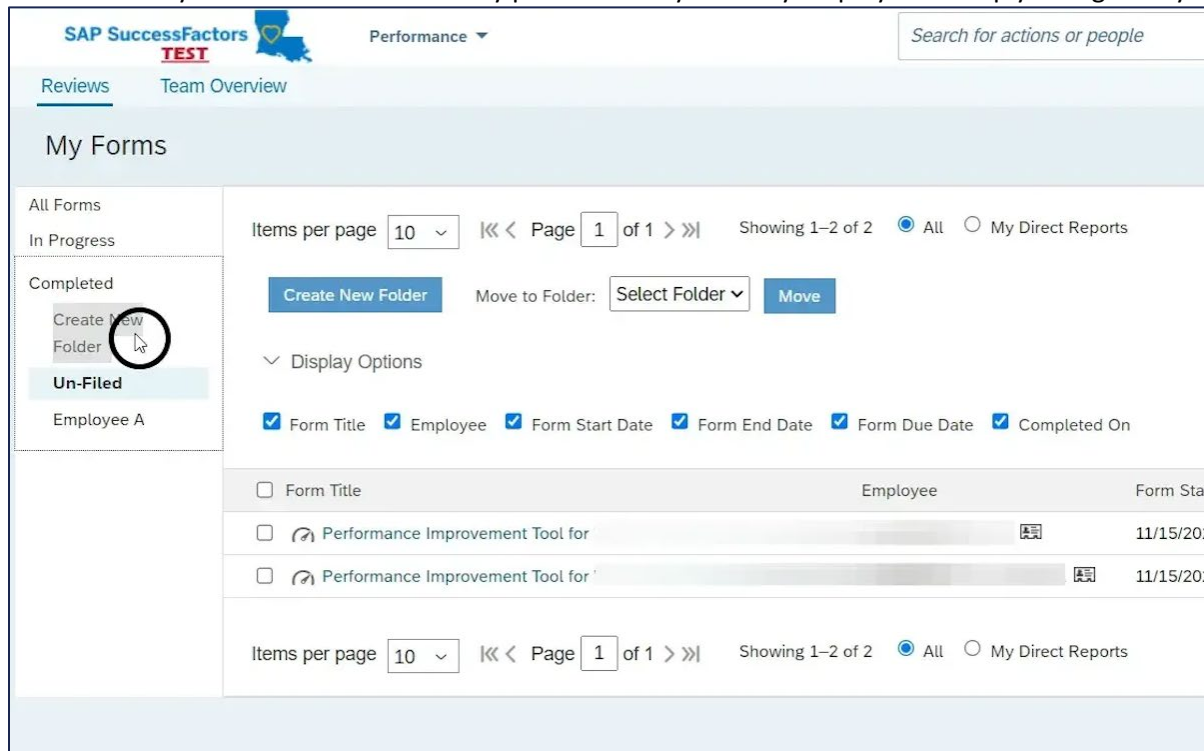
NOTE: "En Route" shows a copy of the form from the last time you altered it. Real-time updates are not available nor can you see any changes made by the individual who has the form.



4. Within the completed folder, you can create folders to help you organize your forms. Click "Completed."

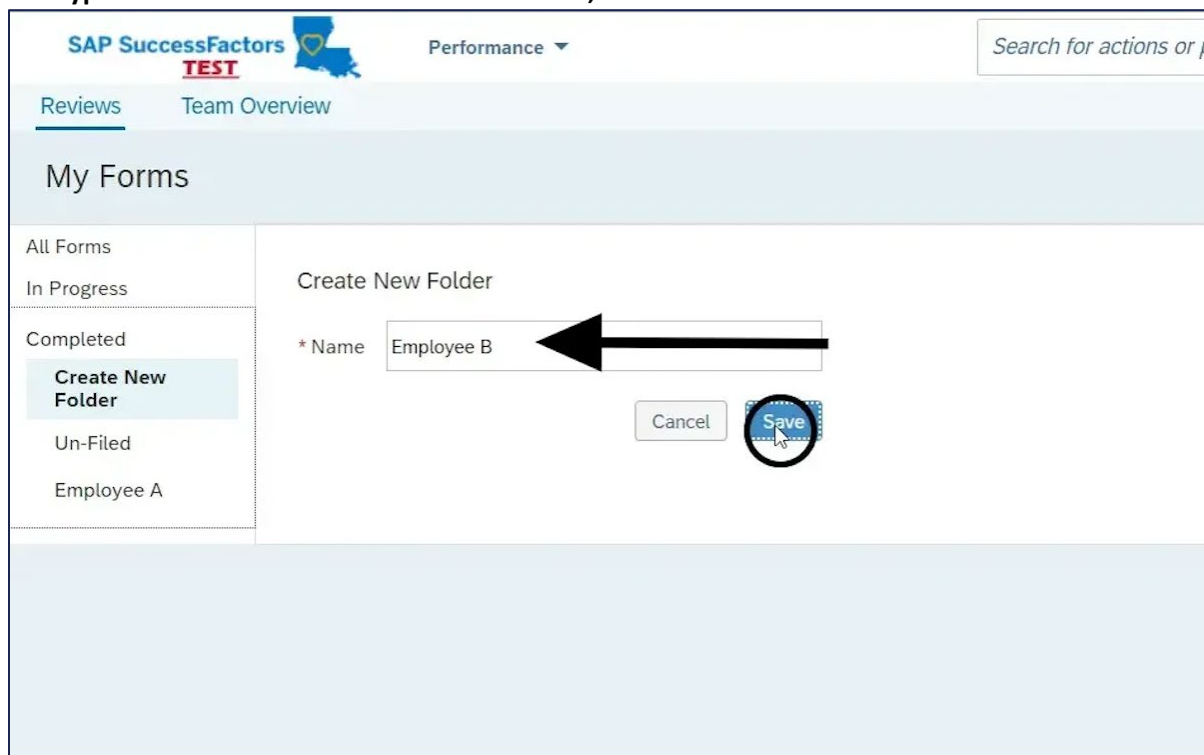
## 5. Click "Create New Folder."

NOTE: You may want to create a folder by performance year or by employee to help you organize your forms.



The screenshot shows the SAP SuccessFactors interface. At the top, there's a header with the SAP SuccessFactors logo, a 'TEST' label, and a 'Performance' dropdown. A search bar on the right says 'Search for actions or people'. Below the header, there are tabs for 'Reviews' and 'Team Overview'. The main section is titled 'My Forms'. On the left, there's a sidebar with categories: 'All Forms', 'In Progress', 'Completed', 'Un-Filed', and 'Employee A'. The 'Create New Folder' button is circled in the 'Completed' section. The main area shows a list of forms with columns for 'Form Title', 'Employee', and 'Form Start'. There are also filters for 'Items per page' (10), 'Page' (1 of 1), and 'Showing 1-2 of 2'. A 'Create New Folder' button is visible in the main area, along with a 'Move to Folder' dropdown and a 'Move' button. Below this, there are 'Display Options' checkboxes for 'Form Title', 'Employee', 'Form Start Date', 'Form End Date', 'Form Due Date', and 'Completed On'.

## 6. Type in the "Name" of the new folder. Then, click "Save."



The screenshot shows the 'Create New Folder' dialog box. The 'Name' field is highlighted with a large black arrow pointing to it, and the text 'Employee B' is entered. The 'Save' button is circled in blue. The 'Cancel' button is also visible. The background shows the same SAP SuccessFactors interface as the previous screenshot, but the 'Create New Folder' button in the sidebar is no longer circled.

7. Click "Un-Filed" to see the completed forms that have not been moved to a folder.

The screenshot shows the 'My Forms' interface. On the left sidebar, under the 'Completed' section, the 'Un-Filed' filter is selected and circled with a hand icon. The main area shows a list of forms with columns for 'Form Title', 'Employee', and 'Form Start Date'. The interface includes navigation controls like 'Items per page' (set to 10) and 'Page 0 of 0'. There are also buttons for 'Create New Folder', 'Move to Folder', and 'Move'.

8. Click on the form you want to move.

The screenshot shows the 'My Forms' interface with the 'Un-Filed' filter selected. The main area displays a list of forms. The first form, 'Performance Improvement Tool for', is selected and circled with a hand icon. The interface includes navigation controls like 'Items per page' (set to 10) and 'Page 1 of 1'. There are also buttons for 'Create New Folder', 'Move to Folder', and 'Move'.

9. Use the drop-down menu to select the correct folder.

The screenshot shows the SAP SuccessFactors interface for 'My Forms'. On the left sidebar, under 'Completed', the 'Un-Filed' folder is selected. The main area shows a list of forms with columns for 'Form Title', 'Employee', 'Form Start Date', 'Form End Date', 'Form Due Date', and 'Completed On'. A 'Move to Folder:' button is visible, and a dropdown menu is open, showing options: 'Select Folder', 'Un-Filed', 'Employee A', and 'Employee B'. A mouse cursor is pointing at 'Employee B'. The 'Move' button is also visible next to the dropdown.

10. Then click "Move." The selected file is now in the selected folder.

The screenshot shows the same SAP SuccessFactors interface. The 'Move to Folder:' dropdown now shows 'Employee B' as the selected folder. The 'Move' button is circled, and a mouse cursor is clicking it. The list of forms remains the same, and the sidebar still shows 'Un-Filed' as the selected folder.

11. Another method for navigating to performance forms is to use the Team Overview. Click "Team Overview" for a snapshot of your employees and the forms related to them.

SAP SuccessFactors **TEST** Performance ▾ Search for actions or people

Reviews **Team Overview**

My Forms

All Forms  
In Progress  
Completed  
Create New Folder  
Un-Filed  
Employee A  
Employee B

Items per page 10 ▾ |<< Page 1 of 1 >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Select Folder ▾ Move

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee	Form Start
<input type="checkbox"/> Performance Improvement Tool for		11/15/2022

Items per page 10 ▾ |<< Page 1 of 1 >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

12. The default view shows where each of your employees is in the Route Map for the performance year. Click on blue buttons within the chart to open an employee's form.





SAP SuccessFactors **TEST** Performance ▾ Search for actions or people

Reviews **Team Overview**

my team ▾

	Initial Planning Supervisor	Initial Planning Session: 2nd Level Evaluator	Planning Discussion	Self-Assessment	Evaluation Supervisor	Evaluation Level Evalu
	✓	✓	✓ Go to Form	✓	Review	
					Review	
					Review	


13. If you hover over the boxes, more information will appear. If there is a check mark, a "Go to Form" option will appear. Click on that to go to a form.

SAP SuccessFactors <b>TEST</b>  Performance ▾ <span>Search for actions or people</span>						
Reviews	Team Overview					
My Team ▴	Initial Planning: Supervisor	Initial Planning Session: 2nd Level Evaluator	Planning Discussion	Self-Assessment	Evaluation: Supervisor	Evaluation: Level Evaluator
	✓	✓	✓ <a href="#">Go to Form</a>	✓	<a href="#">Review</a>	
	<a href="#">Review</a>					
	<a href="#">Review</a>					

14. If the box is empty, hover over it and you will see where the form is in relation to that step in the Route Map.

SAP SuccessFactors


TEST



Performance

▼

Search for actions or people



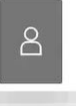
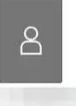

Reviews

Team Overview

▼

2023 Performance Planning and Evaluation Form 70/30

Show

My Team	Due Mon 01/31/2022	Due Mon 02/28/2022	Due Thu 03/31/2022	Due Thu 10/27/2022	Due Sat 11/05/2022	Due Tue 02/28/2023	Due Tue 02/28/2023
	Initial Planning: Supervisor	Initial Planning Session: 2nd Level Evaluator	Planning Discussion	Self-Assessment	Evaluation: Supervisor	Evaluation: 2nd Level Evaluator	Evaluation: Discussion
<div>  </div>	✓	✓	✓	✓	Review		
<div>  </div>	Review				has not reviewed		
<div>  </div>	Review						

15. If you are a 2nd level evaluator, you can use the drop-down menu in the top right to choose that role and view your 2nd level responsibilities.

Search for actions or people

Direct Reports

Select all

Direct Reports

2nd Level Evaluator Reports

Due Thu 03/31/2022 Due Thu 10/27/2022 Due Sat 11/05/2022 Due Tue 02/28/2023 Due Tue 02/28/2023

Planning Discussion Self-Assessment Evaluation: Supervisor Evaluation: 2nd Level Evaluator Evaluation: Discussion

Review

16. Click the arrow in the corner to close the default view.

SAP SuccessFactors TEST Performance

Search for actions or people

Reviews Team Overview

2023 Performance Planning and Evaluation Form 70/30

> 2023 Not Evaluated Employee Form

There are additional team members to review

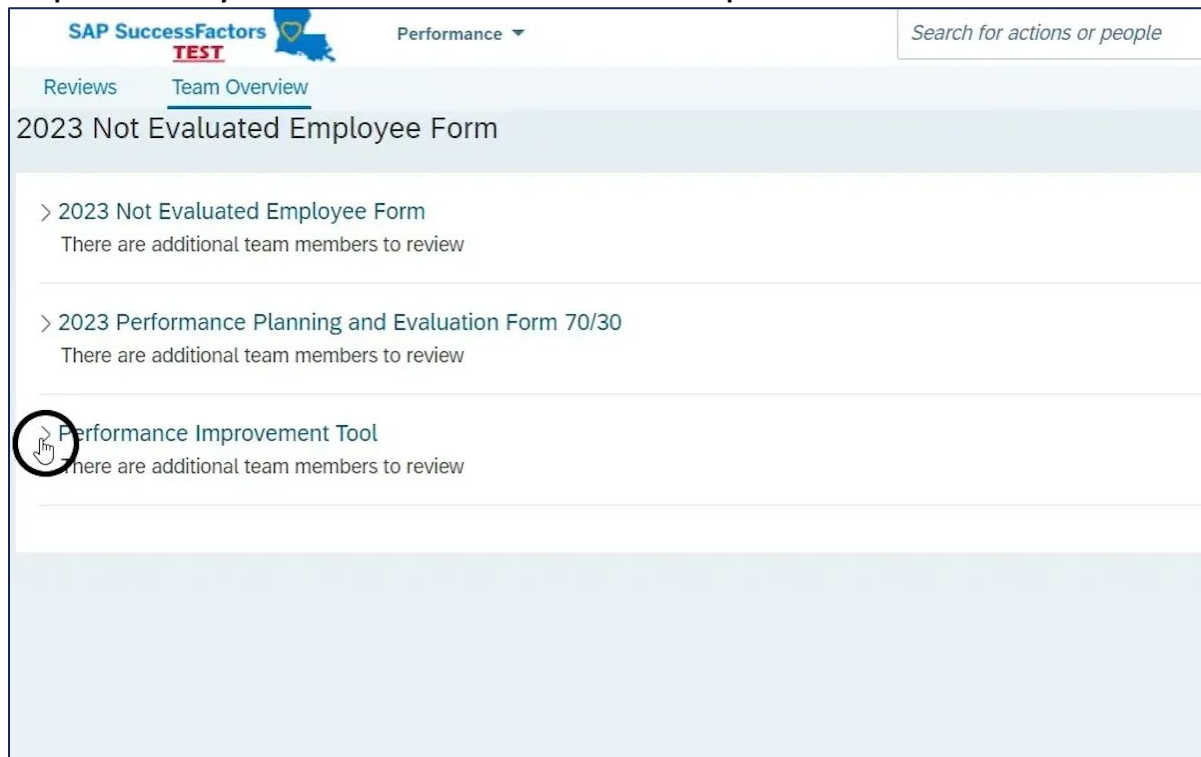
2023 Performance Planning and Evaluation Form 70/30

Due Mon 01/31/2022 Due Mon 02/28/2022 Due Thu 03/31/2022 Due Thu 10/27/2022 Due Sat 11/05/2022 Due Tue 02/28/2023 Due Tue 02/28/2023

My Team Initial Planning: Supervisor Initial Planning Session: 2nd Level Evaluator Planning Discussion Self-Assessment Evaluation: Supervisor Evaluation: 2nd Level Evaluator Evaluation: Discussion

Review

17. This view allows you to see all of the different types of forms launched for your employees this performance year. Click on the link or the arrow or to open the view.



The screenshot shows the SAP SuccessFactors Performance interface. At the top, the header includes the SAP SuccessFactors logo with a 'TEST' badge, a 'Performance' dropdown menu, and a search bar labeled 'Search for actions or people'. Below the header, there are two tabs: 'Reviews' and 'Team Overview', with 'Team Overview' being the active tab. The main heading is '2023 Not Evaluated Employee Form'. Below this, there is a list of three items, each with a right-pointing arrow icon and a subtext 'There are additional team members to review':

- > 2023 Not Evaluated Employee Form
- > 2023 Performance Planning and Evaluation Form 70/30
- > Performance Improvement Tool

A black circle with a hand cursor icon is drawn around the arrow icon of the 'Performance Improvement Tool' item, indicating it should be clicked.

## UNDERSTANDING THE PERFORMANCE MANAGEMENT FORM

1. This box indicates “Incomplete Items.” This box indicates the # of required fields in the form that are currently incomplete. You must complete these fields to advance the form. Click the box to view all incomplete items.

SAP SuccessFactors Performance

Reviews Team Overview

Back to: En Route

2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]

Route Map Introduction Employee Information Review Dates Goals **Competencies**

Competencies are the things people know, are, and do that are causally-related to superior performance. Additionally, competencies provide a family or build toward future career goals. While some competencies are relatively easily developed through training and performance support, of SCS has compiled a competency model with 61 competencies that can cover a variety of jobs and performance needs. The PES process requires **recommend that supervisors choose competencies that are critical for high performance on the employee's current job as well as comp**. For more information on competencies, including definitions of each competency and resources for developing them, please see the competency

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement
- Converts ideas from general concepts into actionable plans
- Exhibits persistence in pursuit of innovation

2. The Route Map illustrates the entire Continuous Performance Management (CPM) form workflow.

NOTE: The green circle with a check indicates that step has been completed. The blue circle shows where the form is now.



SAP SuccessFactors Performance

Reviews Team Overview

Back to: En Route

2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]

Route Map Introduction Employee Information Review Dates Goals Competencies

**Route Map**

Assessment

1 Initial Planning: Supervisor 2 Initial Planning Session: 2nd Level Evaluator 3 Planning Discussion 4 Self-Assessment 5

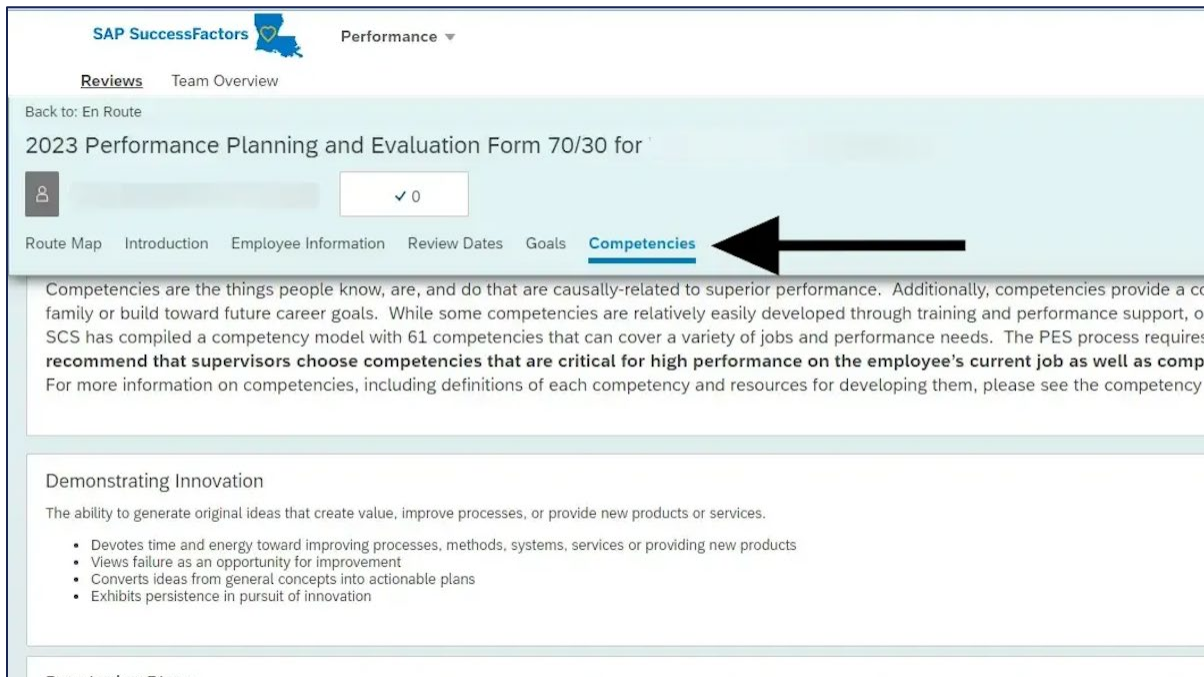
**Introduction**

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with a way to build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil

**Employee Information**

Last Name BELL First Name VA

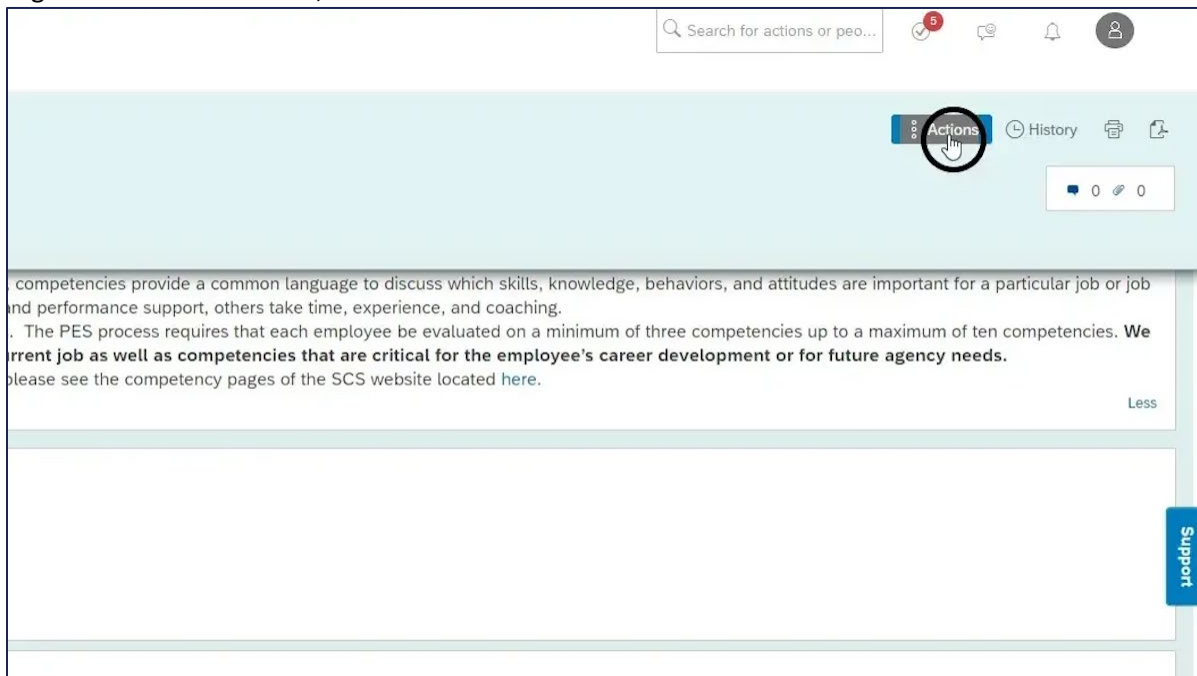
### 3. Use the tabs at the top of the form to navigate to specific sections.



The screenshot shows the SAP SuccessFactors Performance interface. At the top, there are tabs for 'Reviews' and 'Team Overview'. Below these, a breadcrumb trail reads 'Back to: En Route'. The main heading is '2023 Performance Planning and Evaluation Form 70/30 for'. A user profile icon and a checkmark with '0' are visible. A horizontal menu contains the following tabs: 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', 'Goals', and 'Competencies'. A large black arrow points to the 'Competencies' tab, which is currently selected and highlighted in blue. Below the tabs, a text block explains that competencies are things people know, are, and do that are causally-related to superior performance. It mentions that SCS has compiled a competency model with 61 competencies. A bolded sentence states: 'The PES process requires recommend that supervisors choose competencies that are critical for high performance on the employee's current job as well as comp'. Below this, a section titled 'Demonstrating Innovation' describes the ability to generate original ideas. It lists four bullet points: 'Devotes time and energy toward improving processes, methods, systems, services or providing new products', 'Views failure as an opportunity for improvement', 'Converts ideas from general concepts into actionable plans', and 'Exhibits persistence in pursuit of innovation'. The bottom of the screenshot shows the start of a 'Developing Plans' section.

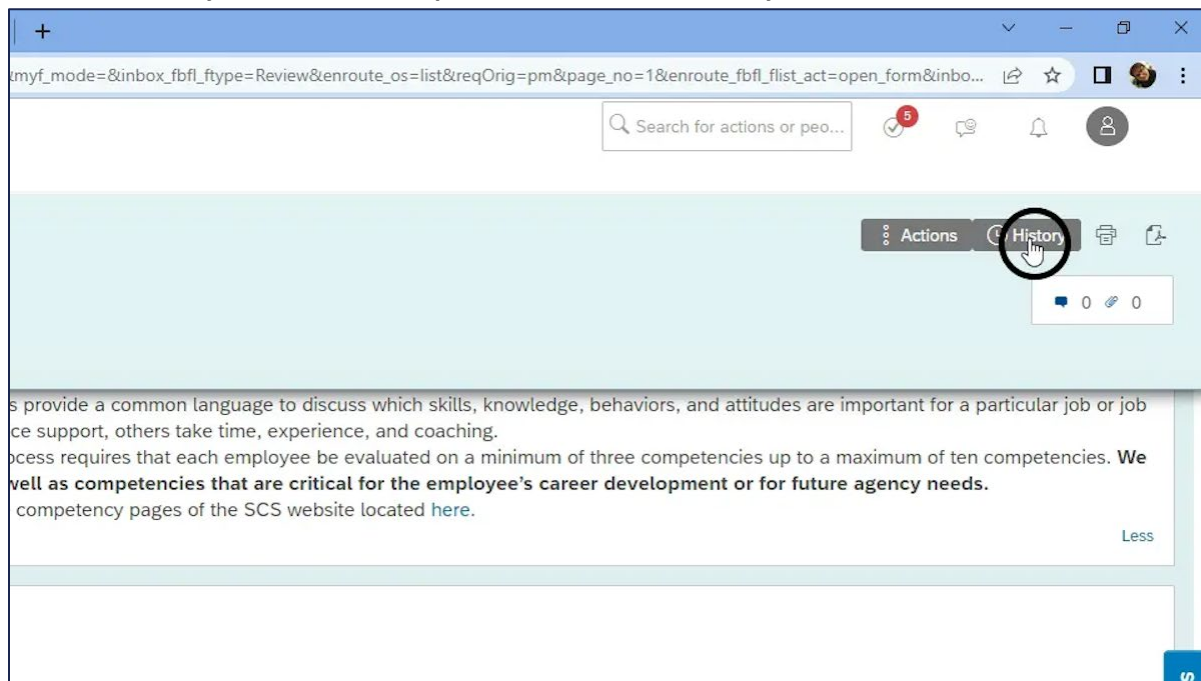
### 4. Click "Actions" to see what actions are available at this point in the Route Map.

NOTE: Action availability changes with each step. Actions may include Spell Check the entire form, Legal Scan the entire form, and Info about this form.

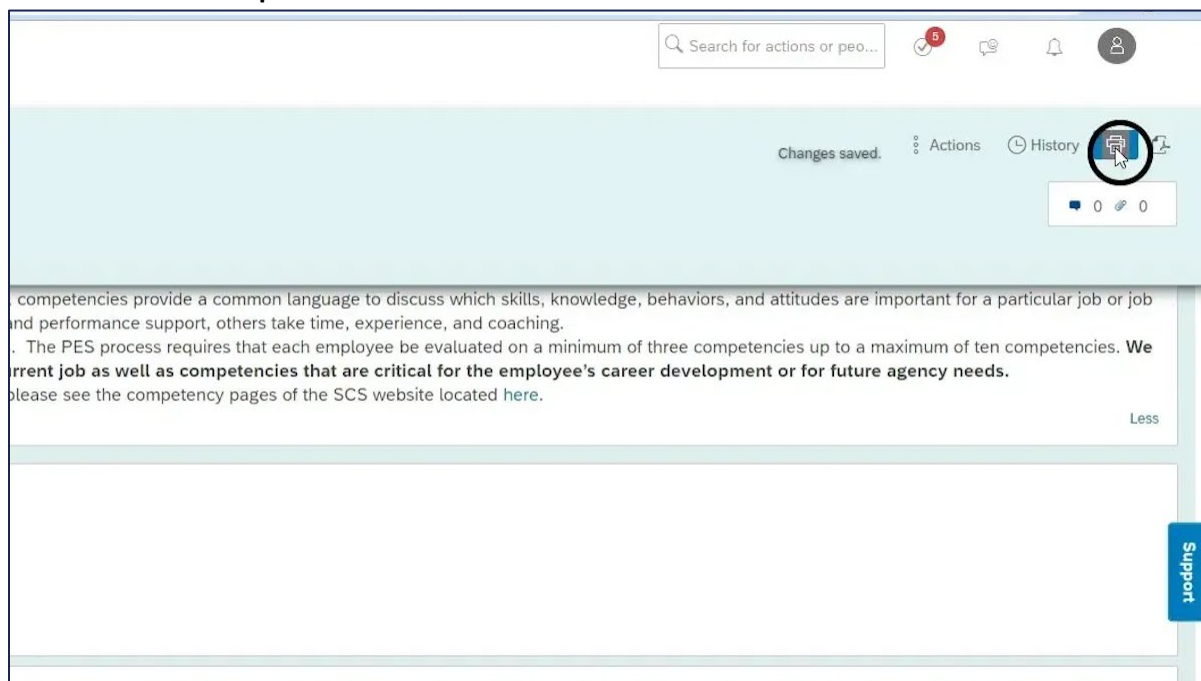


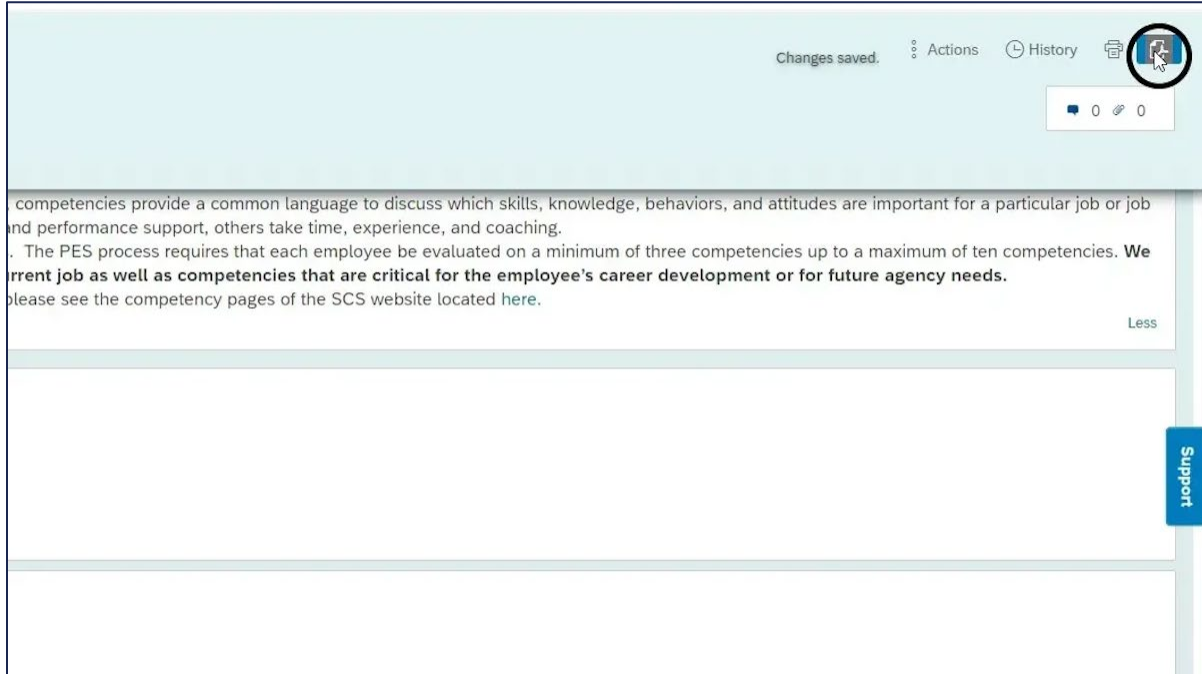
The screenshot shows the same SAP SuccessFactors Performance interface as the previous one, but with the 'Actions' button circled in black. The 'Actions' button is located in the top right corner of the form, next to 'History', 'Print', and 'Share' icons. A red notification badge with the number '5' is visible above the 'Actions' button. Below the 'Actions' button, there is a search bar with the placeholder text 'Search for actions or peo...'. The main content area of the form is partially visible, showing text about competencies: 'competencies provide a common language to discuss which skills, knowledge, behaviors, and attitudes are important for a particular job or job and performance support, others take time, experience, and coaching. The PES process requires that each employee be evaluated on a minimum of three competencies up to a maximum of ten competencies. We rrent job as well as competencies that are critical for the employee's career development or for future agency needs. please see the competency pages of the SCS website located here.' A 'Less' link is visible at the bottom right of this text block. A vertical 'Support' button is located on the far right edge of the form.

5. Click "History" to see the date, person, and action for every instance this form was modified.



6. Click this icon to print.



**7. Click this icon to save as a PDF.**

The screenshot displays the SAP SuccessFactors document editor interface. At the top, a light blue header bar contains the text "Changes saved." followed by icons for "Actions" (three dots), "History" (clock), and a "Save as PDF" icon (a document with a download arrow) which is circled in black. Below the header, the main content area shows a document with text about competencies. The text includes: "competencies provide a common language to discuss which skills, knowledge, behaviors, and attitudes are important for a particular job or job and performance support, others take time, experience, and coaching." and "The PES process requires that each employee be evaluated on a minimum of three competencies up to a maximum of ten competencies. We rrent job as well as competencies that are critical for the employee's career development or for future agency needs. please see the competency pages of the SCS website located [here](#)." A "Less" link is visible at the bottom right of the text. On the right side of the document, there is a vertical blue button labeled "Support".

## THE ROLE OF COMPETENCIES IN PERFORMANCE MANAGEMENT

Competencies are those things an employee is, knows, and does that are causally related to superior job performance. In other words, competencies are knowledge and behaviors that show evaluating supervisors and others when an employee is successful or exceptional on the job.



Competencies can also be called capabilities because they may not be specific to just one job but may also be related to a career. *Thinking Strategically*, for example, is a competency that might be useful in a particular job but may also be useful for the next steps in an employee's career.

The State of Louisiana's competency model contains 58 unique competencies. Not all of these competencies will apply to any specific job or career. When building the competency model, SCS wanted to ensure that the model captured the competencies and capabilities needed by the huge variety of jobs and professions throughout the state.

Each competency has been grouped into either a "grow" category or a "buy" category. Grow competencies are those that take less time to develop and can be supported easily by training or performance support pieces like policies or checklists. For example, the competency *Focusing on Customers* at some job levels, can be mastered by following agency guidelines for interacting with clients on the phone or in person, and can be practiced with training such as CPTP's suite of Customer Service courses.

Buy competencies are those that require practice, experience, and guidance. Buy competencies may take years to fully develop with significant practice, experience, and/or coaching to develop. An example here might be *Managing Ambiguity*, where it takes practice to determine the best way forward when the environment is changing.

## SELECTING COMPETENCIES

With the new CPM system, you must select minimum three and up to ten competencies for your employees. You can find all of the names and definitions of the competencies in the [Appendix – SCS Competency Model](#). As you read them, some will jump out at you as being important for the job your employee is doing or for your agency as a whole.

You must include a minimum of three competencies for evaluation but can include up to ten competencies for evaluation. Which should you choose? Here are several recommendations/best practices:



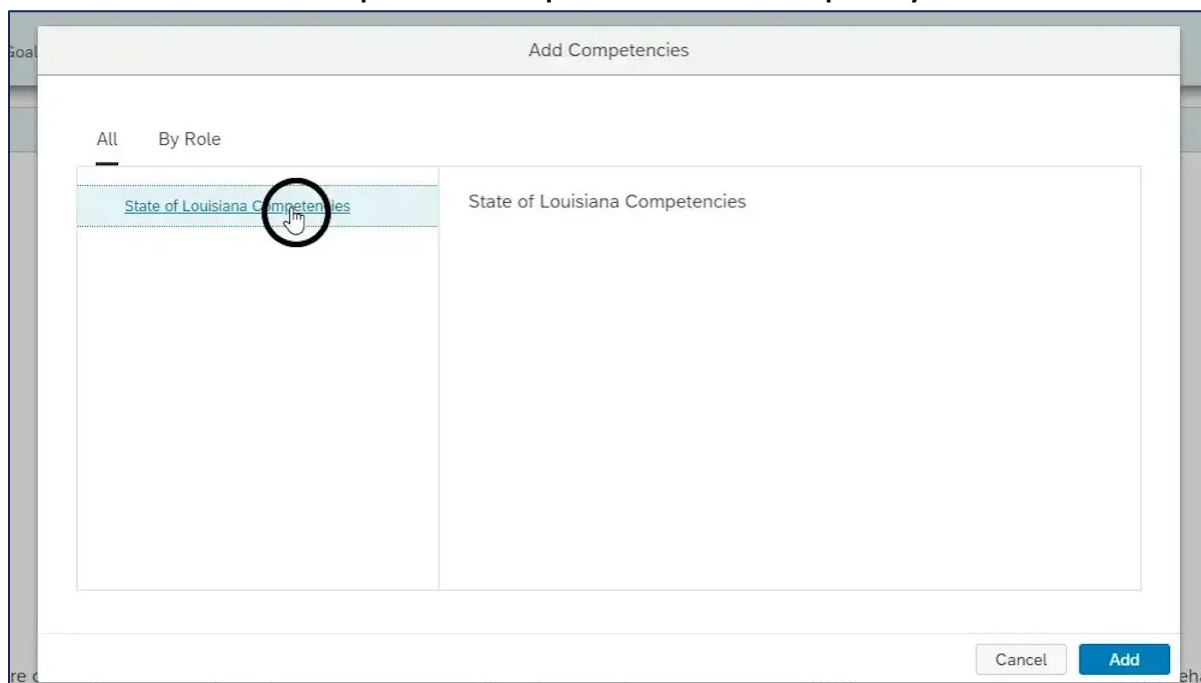
1. **Choose one or more competencies that are critical for the job the employee is in currently.** If the employee works regularly with customers, *Focusing on Customers* may be a competency to add. Does the employee work with data to create reports? Think about adding the *Using Data* competency.
2. **Choose one or more competencies that are critical to the agency as an organization.** Is your agency aspiring to be more innovative in how it solves problems for citizens? You can help support the agency by selecting *Demonstrating Innovation* or *Solving Problems* for all your staff to work on.
3. **Choose one or more competencies that aligns with the likely next step in the employee's career path or progression group.** Is the employee's next step going to require them to work with budgets? You may want to include *Working with Financial Information*. Has the employee expressed a desire to become a leader? Maybe choose one of the many leader-oriented competencies such as *Leading Effective Teams*, *Fostering Engagement*, or *Leading Change*.

## HOW TO ADD COMPETENCIES

1. **Scroll down until you come to the competency section. Click "Add Competency."**

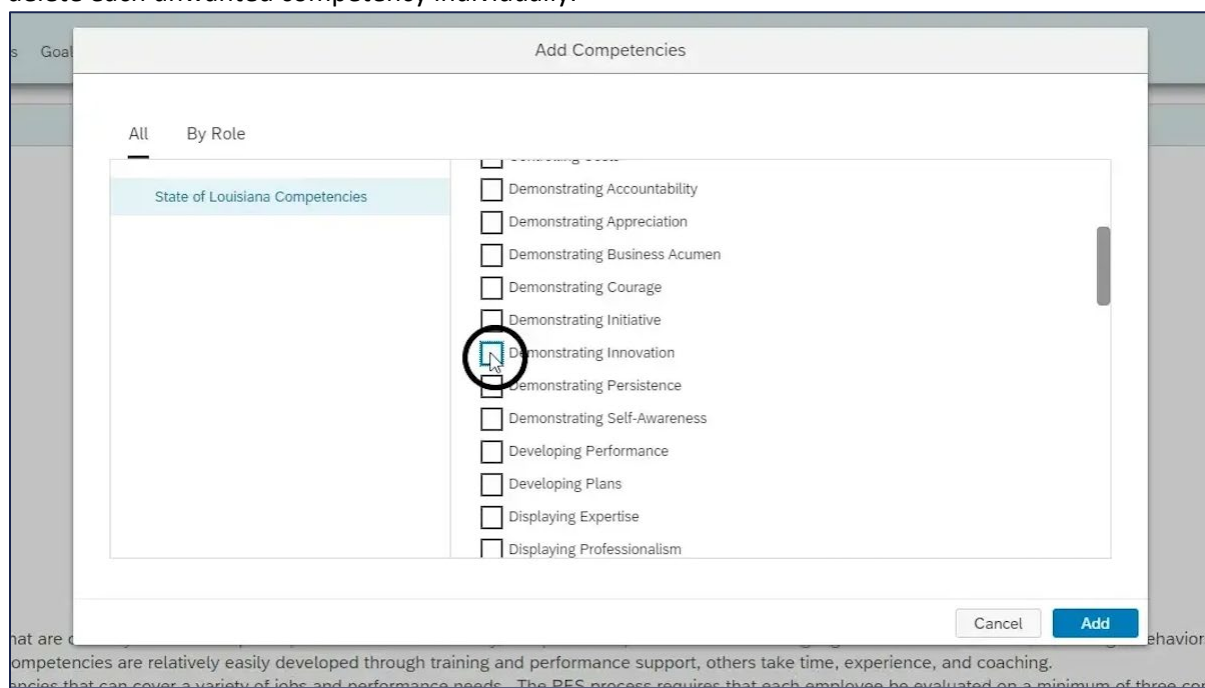


**2. Click "State of Louisiana Competencies" to open the statewide competency model.**



**3. Select the appropriate competencies for your employee. You must select a minimum of 3 and a maximum of 10 competencies.**

NOTE: Do not "Select All." If you do, 50+ competencies will be added to your form. You will have to delete each unwanted competency individually.



**4. After you have selected the competencies, click on "Add" to add them to the Goal Plan.**

The screenshot shows a modal window titled "Add Competencies". At the top, there are two tabs: "All" and "By Role". Below the tabs, on the left, is a list of categories, with "State of Louisiana Competencies" selected and highlighted in light blue. To the right of this list is a scrollable area containing a list of competencies, each with a checkbox. The competencies listed are:

- ☐ Driving vision And Purpose
- ☐ Exhibiting Organizational Awareness
- ☐ Exhibiting Social Awareness
- ☐ Focusing On Customers
- ☐ Following Policies and Procedures
- ☐ Fostering Engagement
- ☐ Influencing Others
- ☐ Leading Change
- ☐ Learning Actively
- ☒ Leveraging Technology
- ☐ Making Accurate Judgments
- ☐ Managing Conflict
- ☐ Managing from a Distance

At the bottom right of the dialog, there are two buttons: "Cancel" and "Add". The "Add" button is highlighted with a red circle and a hand cursor icon, indicating it is the button to click.

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

1. After you have added competencies, you have 2 options: 1. You can "Save and Close" the form, if you are not finished with it; OR 2. You can "Save and Send to 2nd Level Evaluator."

NOTE: Once you send the form to the 2nd Level Evaluator, the Goal Plan is locked and cannot be edited.



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

NOTE: No edits can be made at this point in the Route Map.



Form Title	Employee	Step
2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]	[Employee Name]	Evaluation: Discussion
2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]	[Employee Name]	Initial Planning: Supervise

---

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

Your 2<sup>nd</sup> Level Evaluator may want to meet with you to discuss the Goal Plans and CPM forms for your employees. Since this system does not allow 2<sup>nd</sup> Level Evaluators to comment on performance forms, if a form is not approved, you may need to meet with your 2<sup>nd</sup> Level Evaluator.

Here are some tips to help you prepare for your meeting with your 2<sup>nd</sup> level evaluator:

- Follow any time guidelines provided by your agency. Some agencies will have specific dates or other policies you need to follow to submit your CPM forms on time. If you don't know your agency policies, check with your HR Office.
  - Have all your documentation with you. Documentation should include the completed CPM form, the position description, copies of agency or department mission statements and goals, and any documentation about the individual employee you feel is important to support the work and behavior tasks you chose for the employee.
  - Be prepared to summarize why you chose the work and behavior expectations you chose. It's likely your 2<sup>nd</sup> level evaluator will have many CPM forms to review. Your 2<sup>nd</sup> level evaluator will appreciate your preparedness.
-

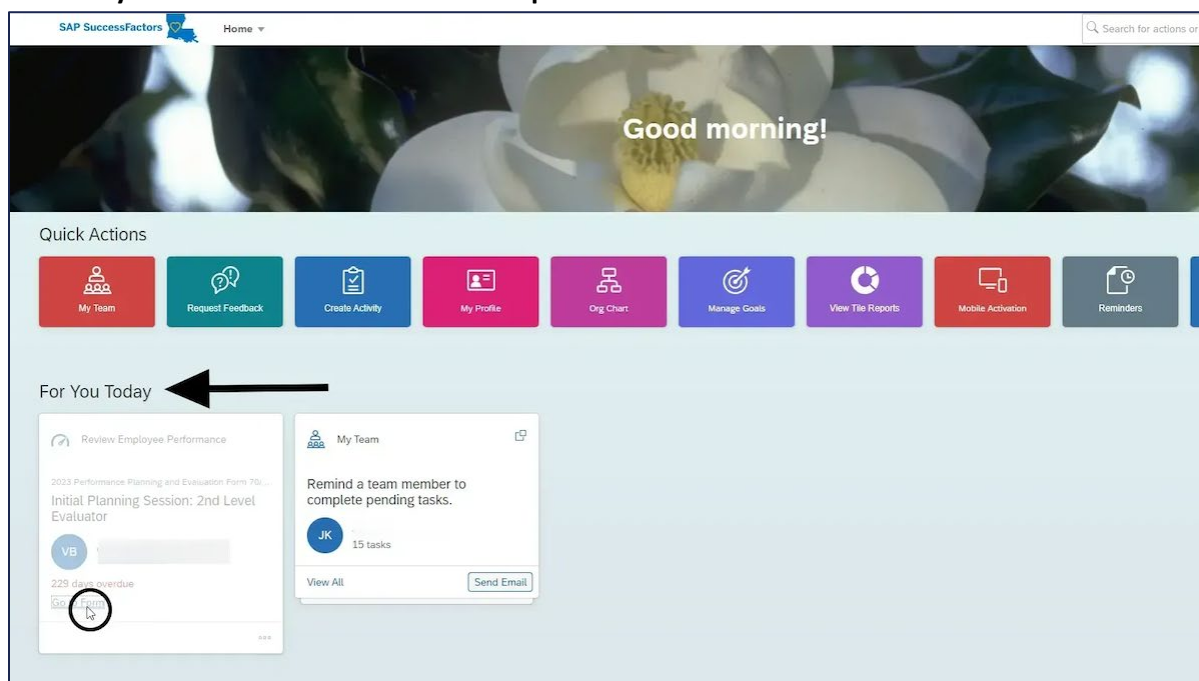
## PLANNING - 2<sup>ND</sup> LEVEL EVALUATOR'S ROLE

Rule 10.3 of the State Civil Service Rules outlines the responsibilities of the 2nd Level Evaluator when utilizing the CPM system. The 2nd Level Evaluator must approve the performance plan and performance evaluation prepared by the Evaluating Supervisor before it is given to the employee.

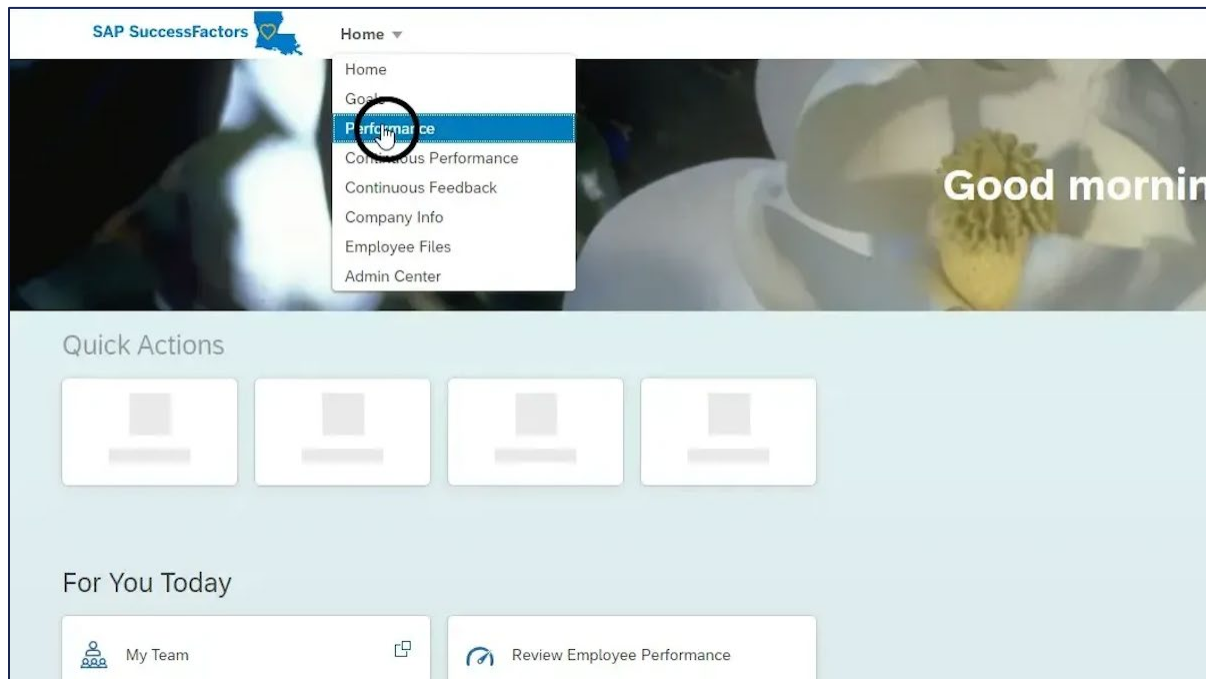


### 2<sup>ND</sup> LEVEL EVALUATOR – NAVIGATING TO THE PLANNING DOCUMENT

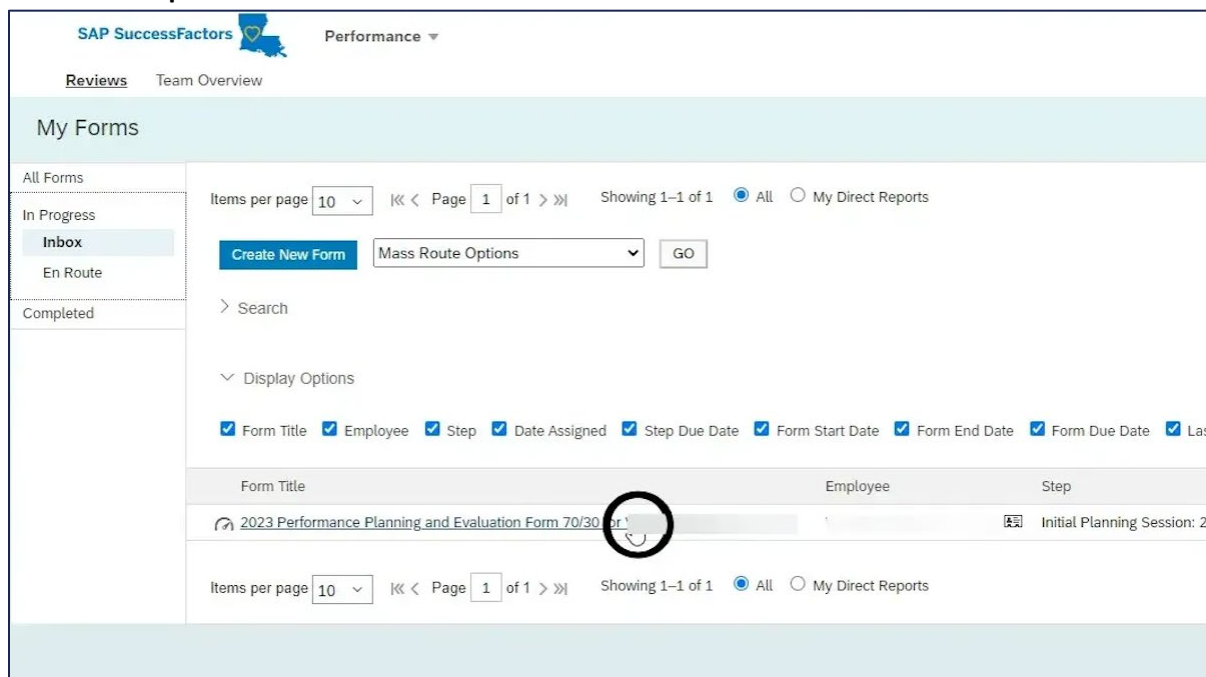
- 1. Navigation Option: 1 - When you have a form to review, it will appear on your dashboard in the "For You Today" section. Click "Go to Form" to open the form.**



2. **Navigation Option 2:** Another navigation option would be to use the Home menu and click on "Performance."



3. The form will appear in your "In Progress - Inbox," which is the initial screen in this section. Click on the form to open it.



## 2<sup>ND</sup> LEVEL EVALUATOR – EVALUATING THE PLANNING DOCUMENT

If you do not agree with the goals or competencies 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. Review the Goals created for the employee.

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)?



<p>Compliance</p> <p>Complete all required annual mandatory trainings</p> <p>Courses completed</p>
<p>Achievements    Goal Details    Other Details</p> <hr/> <p>There are no Achievements.</p>
<p>Professional Development</p> <p>Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date</p> <p># of events attended</p>
<p>Achievements    Goal Details    Other Details</p> <hr/> <p>There are no Achievements.</p>

2. Click "Goal Details" to view comments and other information about the goal.

Performance  
Facilitation training sessions for PMGM  
Post-class survey

Achievements **Goal Details** Other Details

Goal Name*	Facilitation training sessions for PMGM
Start Date	01/01/2022
% Complete	0.0%
Comments	

Compliance  
Complete all required annual mandatory trainings  
Courses completed

3. Click "Other Details" to see the Goal Targets.

2023 Performance Planning and Evaluation Form 70/30 for [User] ✓ 0

Route Map Introduction Employee Information Review Dates **Goals** Competencies

Target Date	Course 1	02/01/2023
Actual		1
Target Date	Course 2	04/07/2023
Actual		
Target Date	Course 3	08/01/2023
Actual		

Performance  
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023  
# of trainings conducted

Achievements Goal Details **Other Details**

Target:

#### 4. Click "Competencies" or scroll down to the Competencies Section.

2023 Performance Planning and Evaluation Form 70/30 for

Route Map Introduction Employee Information Review Dates Goals **Competencies**

Attend 3 seminars, conferences and/or trainings during the performance year to keep professional skills up to date  
# of events attended

Achievements Goal Details Other Details

Target:

Competencies (30.0%)

**SCS Competency Model**

Buy vs. Grow: Buy, Grow  
State 9: State 9  
Groups: Groups, Thought, Results, Self, People

NOTE: color squares indicate competency categories

#### 5. Review the competencies selected for this employee.

When reviewing competencies, consider these questions:

- Are the competencies selected critical for high performance on the employee's current job?
- Are the competencies selected critical for the employee's career development or for future agency needs?



**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement
- Converts ideas from general concepts into actionable plans
- Exhibits persistence in pursuit of innovation

**Developing Plans**

The ability to prioritize tasks and competing demands to accomplish goals.

- Clearly defines goals and actions items to execute plans
- Considers possible changes, constraints, or other obstacles that might impact plans
- Accurately estimates time and resources need to accomplish tasks
- Makes adjustments to plans as needed

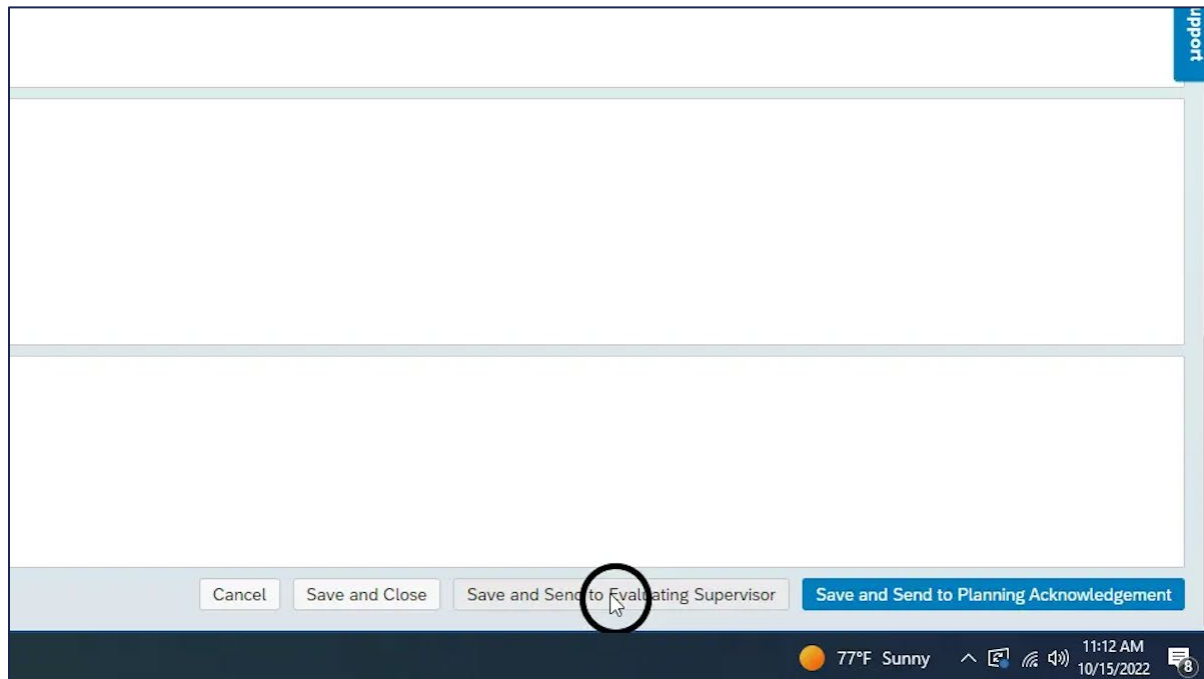
**Leveraging Technology**

The ability to find, create, use, and improve technology and its related processes to further organizational goals.

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

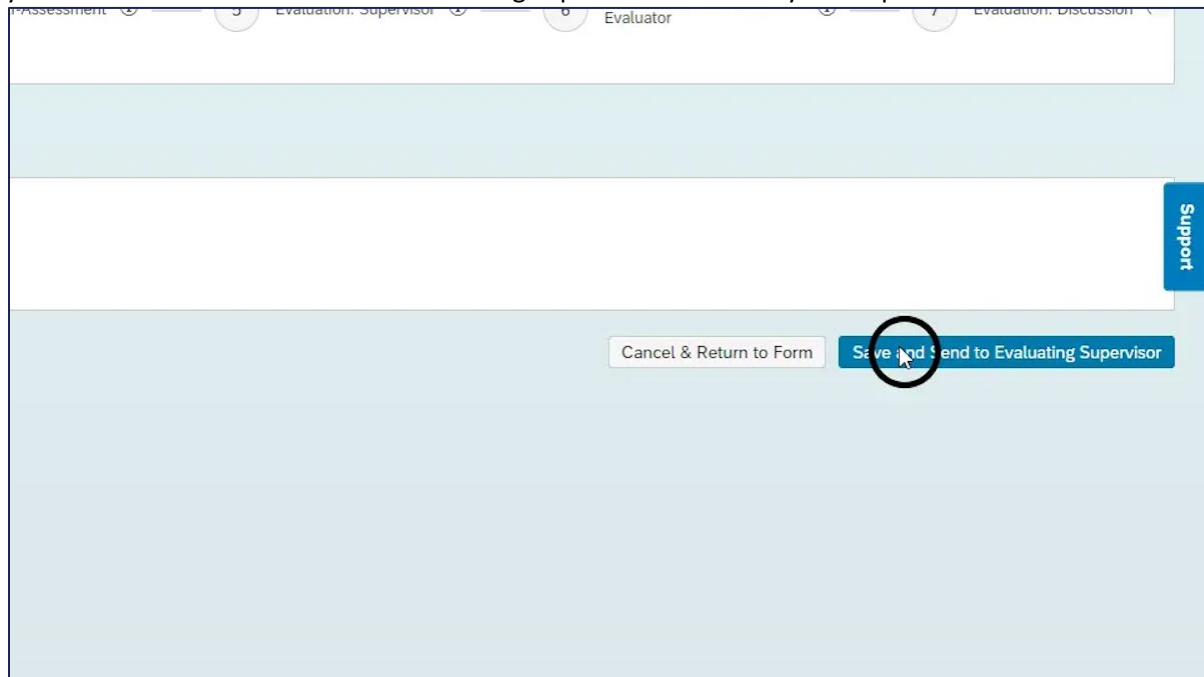
## 2<sup>ND</sup> LEVEL EVALUATOR – PLANNING NOT APPROVED

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



2. The next screen asks you to confirm your selection.

NOTE: 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.



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

1. If you approve of the planning, click "Save and Send to Planning Acknowledgement."



2. Confirm your selection or "Cancel & Return to Form."

NOTE: Once you approve this form, the Status of the Goal Plan is APPROVED. The form is sent to the supervisor and the employee simultaneously.



## ROUTE MAP NOTE – AFTER PLANNING IS APPROVED BY 2<sup>ND</sup> LEVEL EVALUATOR



When the 2<sup>nd</sup> Level Evaluator approves the performance management planning form, multiple actions occur:

- *The Status of the Goal Plan changes to APPROVED.*
- *The form is sent to the supervisor and the employee simultaneously.*
- *The employee must acknowledge the planning was received BEFORE the planning discussion is conducted or that action is unavailable.*
- *You will receive an email advising you that the form is available.*

If either the employee or the supervisor opens the form, the form will lock for other users. While it is locked, the error message reads: “The form is currently locked because NAME is actively editing the form or has not properly closed the form using the Save & Close button. The form will be unlocked when NAME closes the form or automatically in xx minutes.”

2023 Performance Planning and Evaluation Form 70/30 for [REDACTED]

Route Map

Due 02/28/2023

1 Initial Planning: Supervisor ① — 2 Initial Planning Session: 2nd Level Evaluator ① — 3 Planning Discussion ① — 4 Self-Assessment ① — 5 Evaluation: Supervisor ① — 6 Evaluation: 2nd Level Evaluator

Properties

The form is currently locked because [REDACTED] is actively editing the form or has not properly closed the form using the Save & Close button. The form will be unlocked when [REDACTED] closes the form or automatically in 42 minutes.

Locked By: [REDACTED] (2022-10-15 17:35:24 UTC+0000)

Originator: [REDACTED]

Employee: [REDACTED]

Type: Form

Title: 2023 Performance Planning and Evaluation Form 70/30 for VACKENTASCHRE Q BELL

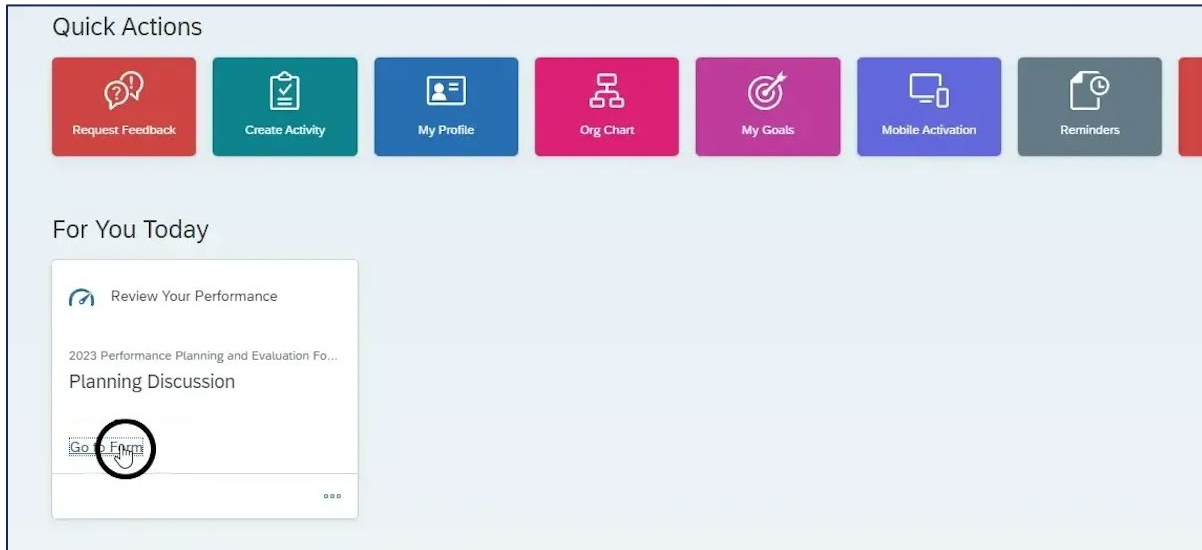
Due Date: 02/28/2023

Status: Modify Stage

Close

## ACKNOWLEDGING THE PLANNING FORM AS AN EMPLOYEE

### 1. Navigate to your form.



Quick Actions

Request Feedback Create Activity My Profile Org Chart My Goals Mobile Activation Reminders

For You Today

Review Your Performance

2023 Performance Planning and Evaluation Fo...  
Planning Discussion

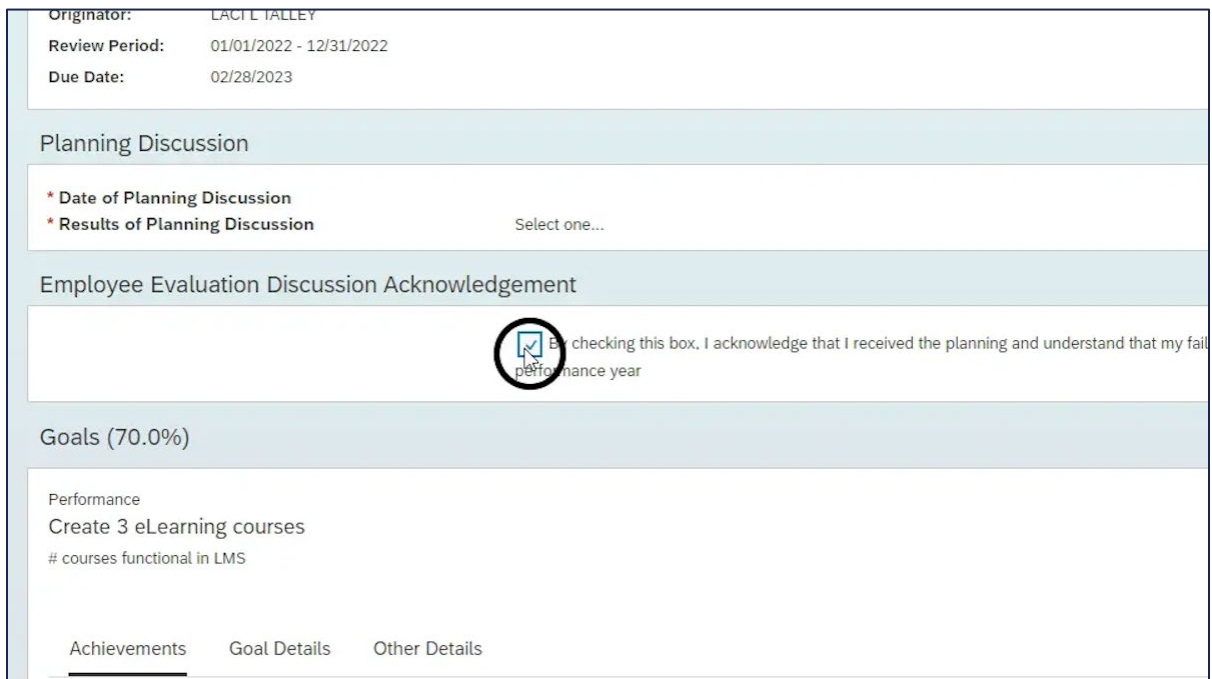
Go to Form

### 2. Review the form. Check the box in "Employee Planning Discussion Acknowledgment" section.

The acknowledgement reads: *By checking this box, I acknowledge that I received the planning and understand that my failure to sign will not prohibit the planning from becoming official for the performance year.*



NOTE: This step is not required for the form to continue in the Route Map. However, it must be completed before you, the supervisor, conduct and document the Planning Discussion. You will be notified via email when your employee has acknowledged the form.



Originator: LACIE LALLEY

Review Period: 01/01/2022 - 12/31/2022

Due Date: 02/28/2023

Planning Discussion

\* Date of Planning Discussion

\* Results of Planning Discussion Select one...

Employee Evaluation Discussion Acknowledgement

☒ By checking this box, I acknowledge that I received the planning and understand that my failure to sign will not prohibit the planning from becoming official for the performance year.

Goals (70.0%)

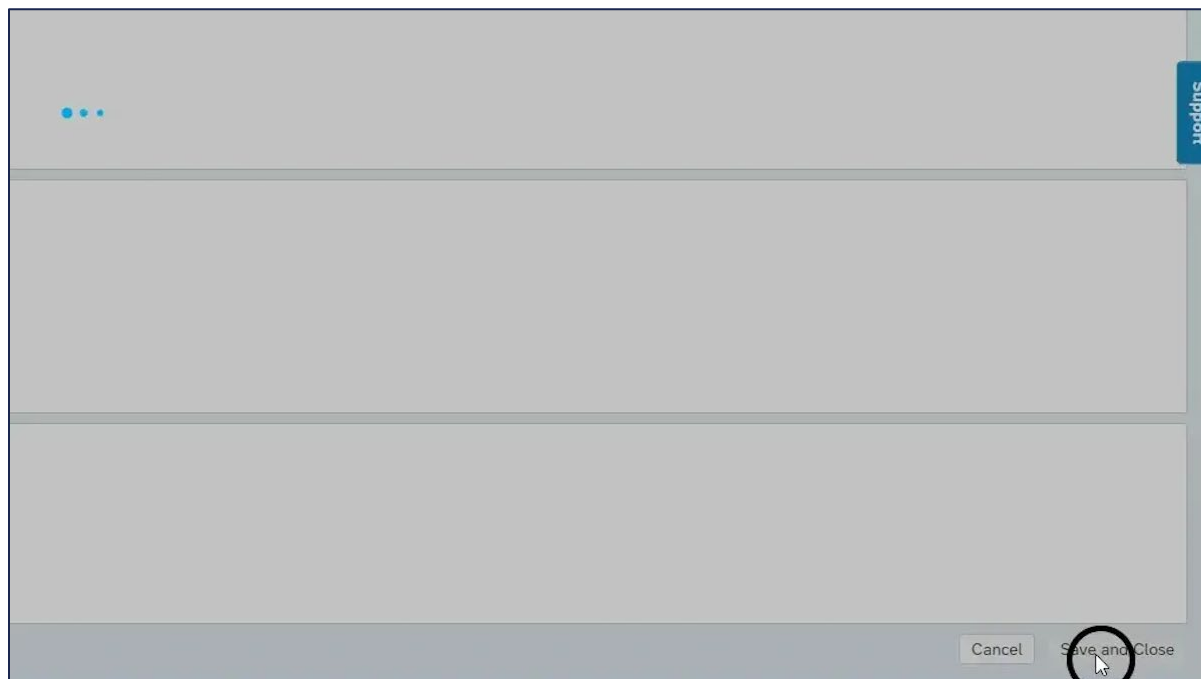
Performance

Create 3 eLearning courses

# courses functional in LMS

Achievements Goal Details Other Details

3. Scroll down and clicks on "Save and Close."



## CONDUCTING THE PLANNING DISCUSSION

**WHAT:** The planning discussion is a unique and exciting chance to discuss with your employee the goals and competencies assigned to them for the performance year.

**WHEN:** Once your 2nd Level Evaluator has approved the form, schedule a meeting with your employee to conduct the planning discussion.

It is required to hold a planning discussion with each employee no later than March 1<sup>st</sup> of any performance year, or within sixty days of hiring a new employee.

**WHY:** The planning discussion is one of the critical events in the employee's performance year. This discussion is a chance for you and your employee to communicate about the employee's job; its importance to agency mission; and its relation to any agency goals, initiatives, or plans for the coming performance year. Equally important, this conversation gives you a chance to coach your employee on their performance development, understand the employee's career aspirations, and work with your employee to facilitate growth.

In short, planning discussions have a far greater impact than a simple conversation about assigned goals. The planning discussion is a springboard for employee development that can affect an agency's performance, employee retention, and succession planning.



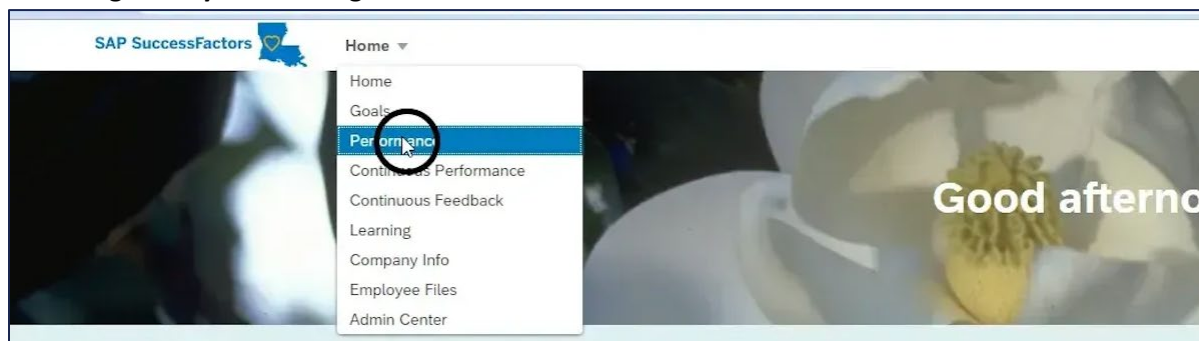
## DOCUMENTING THE PLANNING DISCUSSION - SUPERVISOR

**Do not document your planning discussion until your employee checks the box in "Employee Planning Discussion Acknowledgment" section. Once you document the planning discussion, the employee cannot check the acknowledgement.**

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



### 1. Navigate to your "In Progress - Inbox."



## 2. Open the correct form.

SAP SuccessFactors Performance

Reviews Team Overview

### My Forms

All Forms

In Progress

**Inbox**

En Route

Completed

Items per page 10 << > Page 1 of 1 >> Showing 1–3 of 3 ☐ All ☒ My Direct Reports

[Create New Form](#) Mass Route Options [GO](#)

> Search

Display Options

☒ Form Title ☒ Employee ☒ Step ☒ Date Assigned ☒ Step Due Date ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Last Modified

Form Title	Employee	Step
2023 New Appointment Performance Planning and Evaluation Form 70/30 for		Initial Plan
2023 Performance Planning and Evaluation Form 70/30 for		Planning
2023 Performance Planning and Evaluation Form 70/30 for		Evaluation

Items per page 10 << > Page 1 of 1 >> Showing 1–3 of 3 ☐ All ☒ My Direct Reports

## 3. Conduct the Planning Discussion.

### 2023 Performance Planning and Evaluation Form 70/30 for

Route Map Introduction Employee Information Review Dates **Planning Discussion** Employee Evaluation Discussion Acknowledgement

Last Name

Job Title HUMAN RESOURCES CONSULTANT C

Personnel Area Description CS-State Civil Service

### Review Dates

Originator:

Review Period: 01/01/2022 - 12/31/2022

Due Date: 02/28/2023

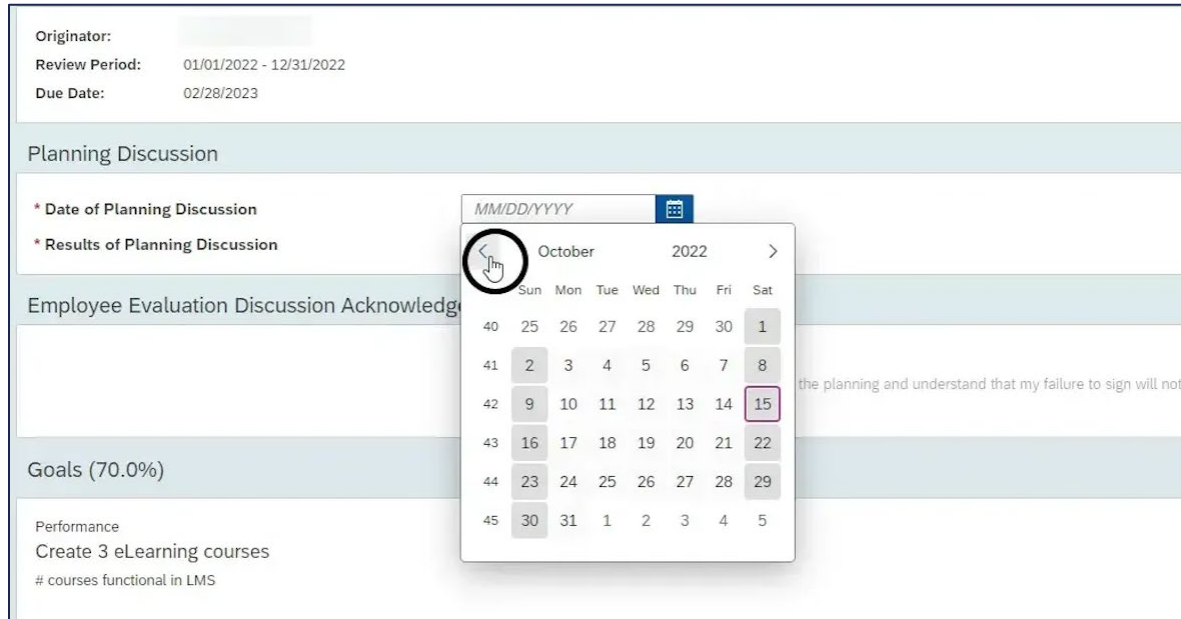
### Planning Discussion

\* Date of Planning Discussion MM/DD/YYYY

\* Results of Planning Discussion Select one...

#### 4. Select the "Date of Planning Discussion."

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



Originator: [Redacted]  
 Review Period: 01/01/2022 - 12/31/2022  
 Due Date: 02/28/2023

Planning Discussion

\* Date of Planning Discussion

\* Results of Planning Discussion

Employee Evaluation Discussion Acknowledgment

Goals (70.0%)

Performance  
 Create 3 eLearning courses  
 # courses functional in LMS

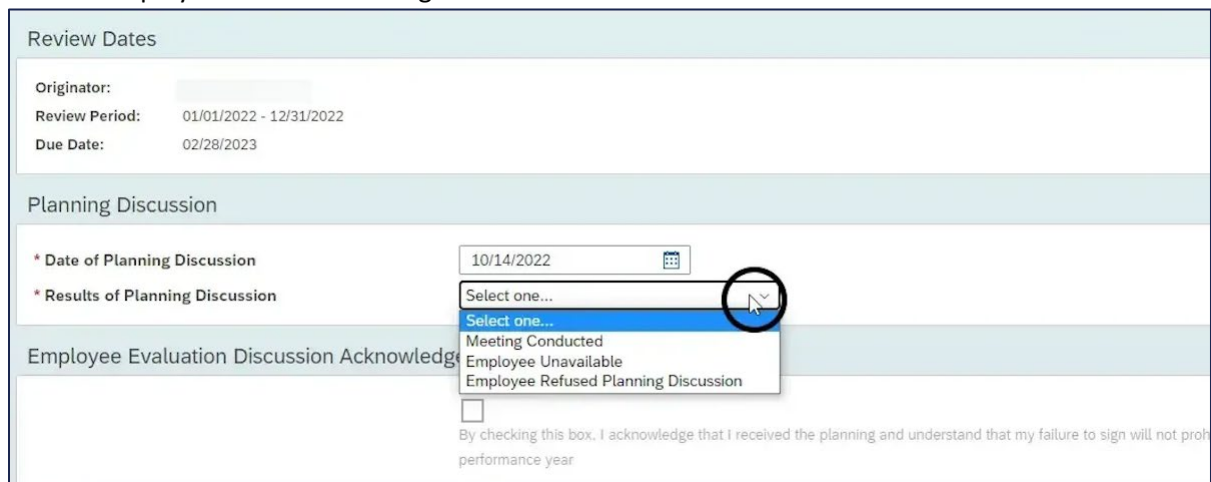
the planning and understand that my failure to sign will not

A calendar pop-up is shown for October 2022, with the date 15 selected. A green checkmark icon is visible in the top right corner of the page.

#### 5. Select the "Results of Planning Discussion."

NOTE: You have 3 options available.

- Meeting Conducted
- Employee Unavailable
- Employee Refused Planning Discussion



Review Dates

Originator: [Redacted]  
 Review Period: 01/01/2022 - 12/31/2022  
 Due Date: 02/28/2023

Planning Discussion

\* Date of Planning Discussion

\* Results of Planning Discussion

Employee Evaluation Discussion Acknowledgment

By checking this box, I acknowledge that I received the planning and understand that my failure to sign will not prohibit my performance year

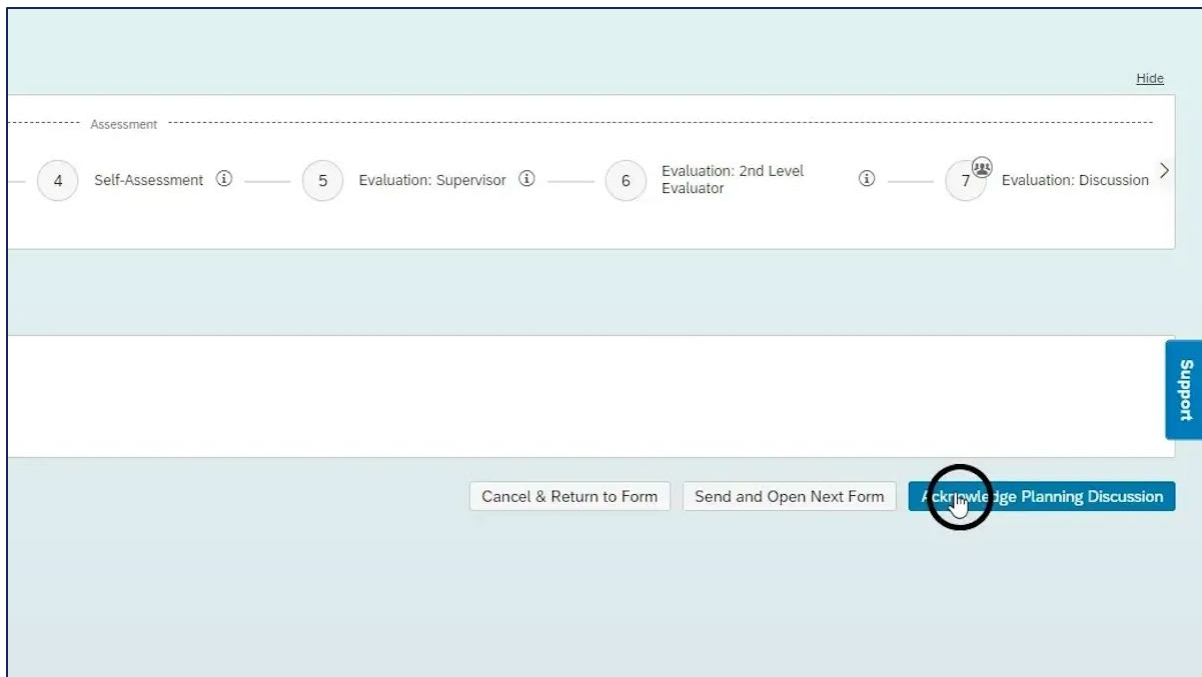
A dropdown menu is shown for the "Results of Planning Discussion" field, with the date 10/14/2022 selected. The dropdown options are: Meeting Conducted, Employee Unavailable, and Employee Refused Planning Discussion. A green checkmark icon is visible in the top right corner of the page.

6. After Planning Discussion is completed, scroll to the bottom of the form, and click "Acknowledge Planning Discussion."



This screenshot shows the bottom section of a form. At the bottom right, there are three buttons: "Cancel", "Save and Close", and "Acknowledge Planning Discussion". The "Acknowledge Planning Discussion" button is highlighted with a black circle. A vertical "Support" button is visible on the right edge of the form.

7. Confirm your selection or cancel.



This screenshot shows the "Assessment" section of the form. It features a progress bar with four steps: "4 Self-Assessment", "5 Evaluation: Supervisor", "6 Evaluation: 2nd Level Evaluator", and "7 Evaluation: Discussion". The "7 Evaluation: Discussion" step is currently active. Below the progress bar, there are three buttons: "Cancel & Return to Form", "Send and Open Next Form", and "Acknowledge Planning Discussion". The "Acknowledge Planning Discussion" button is highlighted with a black circle. A vertical "Support" button is visible on the right edge of the form.

## CPM EVALUATION

Evaluation occurs at the end of each calendar year. Evaluations must be complete by March 1<sup>st</sup> of the following year. For example, evaluations for calendar year 2023 must be completed by March 1, 2024.

There are many reasons to evaluate an employee's performance. Under State Civil Service rules, a rating above Unsuccessful/Needs Improvement is needed to achieve permanent status, to be promoted, to progress in a Career Progression Group, to be placed on the Department's Preferred Reemployment List, and to be eligible for a market adjustment.

Beyond this, performance management, when done well, can improve an agency's ability to retain employees, upskill them, and maintain succession planning. For the State of Louisiana, performance evaluation includes at minimum a planning session held between a supervisor and an employee and an evaluation discussion held after the performance year ends. The SF system provides multiple opportunities to expand from simple performance monitoring to coaching, guiding, and developing employees through tracking achievements, meeting tools, and continuous feedback opportunities. Research clearly shows that employees who receive thoughtful feedback, opportunities for practice, and safe spaces to learn tend to remain and advance with the organization. These employees generally perform better and promote faster than their counterparts in organizations that do only the minimum tasks of performance evaluation.

SCS invites you to embrace performance management and to use it as an opportunity to improve your and your employees' skills.

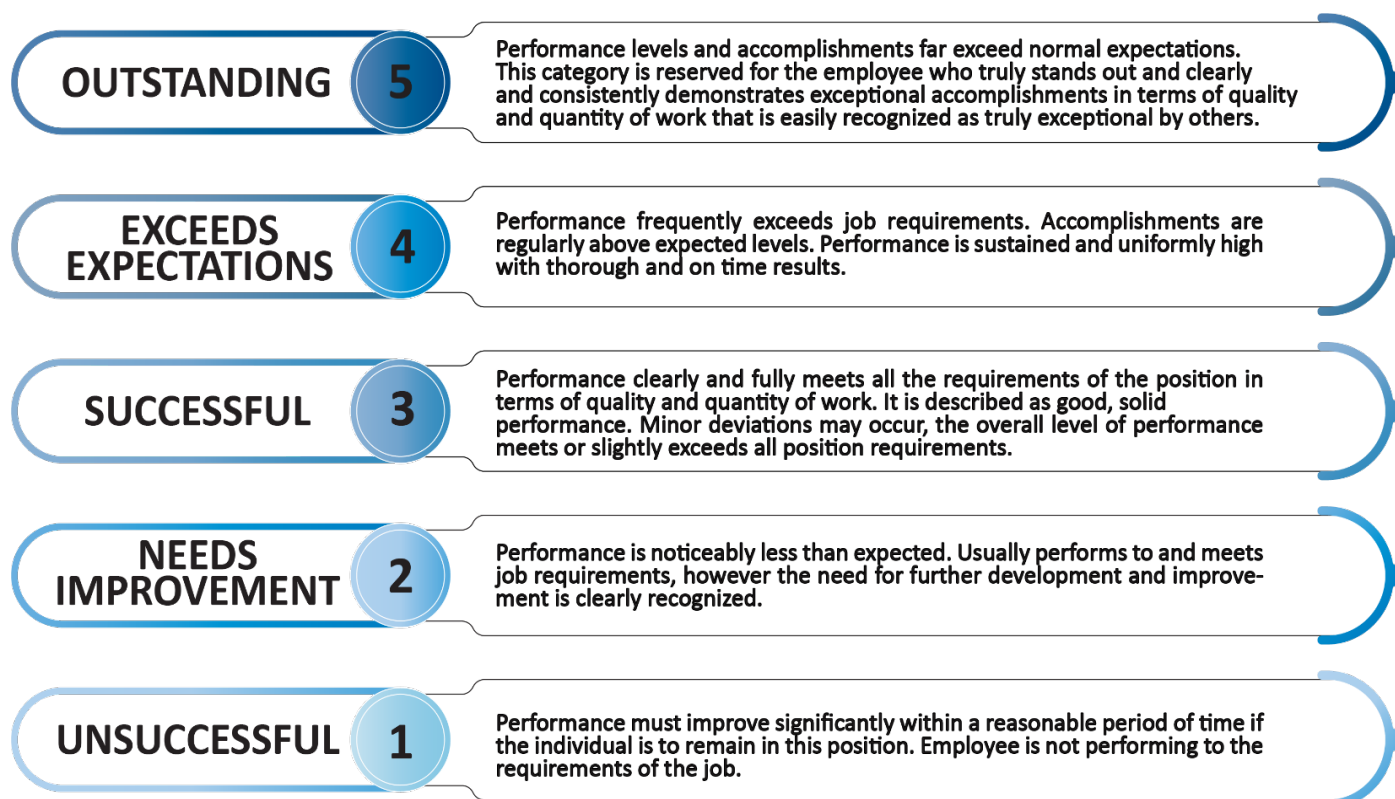


## RATING SCALE OVERVIEW

Ratings should be based on the employee's work performance, not on feelings. It is important for supervisors to keep documentation to make sure they are basing their employees' ratings on performance.

It is also important to remove as much bias from ratings as possible. This includes making sure a rating is based on performance throughout the year, not just the last few weeks before evaluation. It means making sure similarly situated employees are treated similarly, i.e., behaviors that are rewarded or punished for one employee are rewarded or punished for all employees.

The Continuous Performance Management evaluation process uses a 5-point scale.



NOTE: "Unable to Rate" is also available. This rating does not factor into the overall performance score. This should only be used if there is not enough information to assign a rating for a goal or a competency. For example, if a goal is cancelled or postponed, the employee has not had an opportunity to perform or to be evaluated; then, "unable to rate" would be acceptable.

## EMPLOYEE SELF-ASSESSMENT

**WHAT:** Self-assessment is an opportunity for you and your employee and/or supervisor to review the past year's performance. As an employee, you can edit your goals to show your goal status, achievements, and other accomplishments for the performance year. You can, also, consider any obstacles or problems you encountered when working to achieve your goals.



**WHEN:** Self-assessment begins after the Planning Discussion. Like supervisors, you, as an employee, should be updating goals and documenting your performance throughout the year. Self-assessment will end towards the end of the performance year and the performance management form will be pushed to the next step in the Route Map.

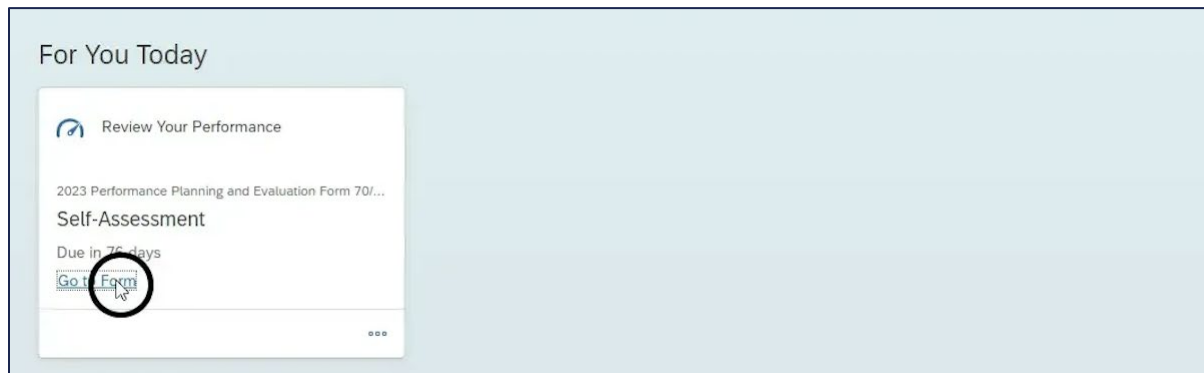
**WHY:** Allowing employees to self-assess their performance is important in establishing a performance culture. Organizations thrive when their members share authentic feedback with one another and when trust is maintained. Employee self-evaluations allow a supervisor to see how aligned employees are with their own views, so any gaps or misalignments can be rectified. They also offer opportunities for supervisors to praise behaviors that support good performance, as well as to identify and hopefully extinguish those behaviors that do not. Finally, self-assessments offer supervisors and employees the opportunity to build a trusting relationship that fosters employee development.

**SF NOTES:** *Self-assessment is not required. The form may be sent to the evaluating supervisor at any time. However, once the form is moved to the next stage, the employee loses access to the self-assessment opportunity.*

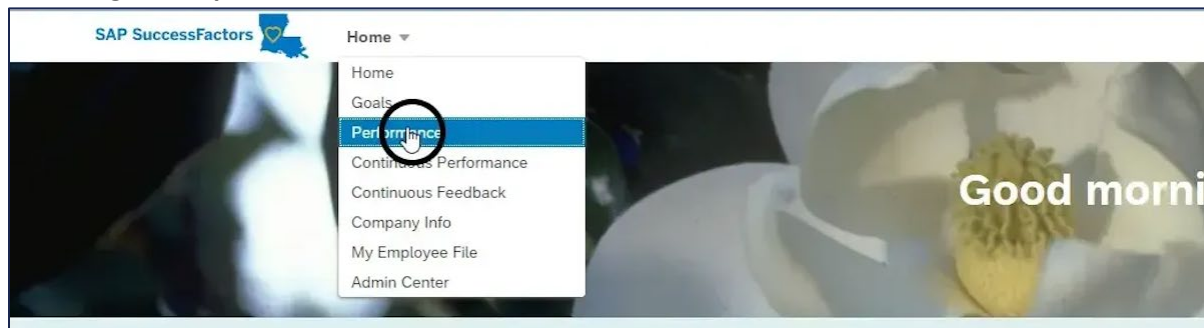


## NAVIGATING TO FORM FOR SELF-ASSESSMENT

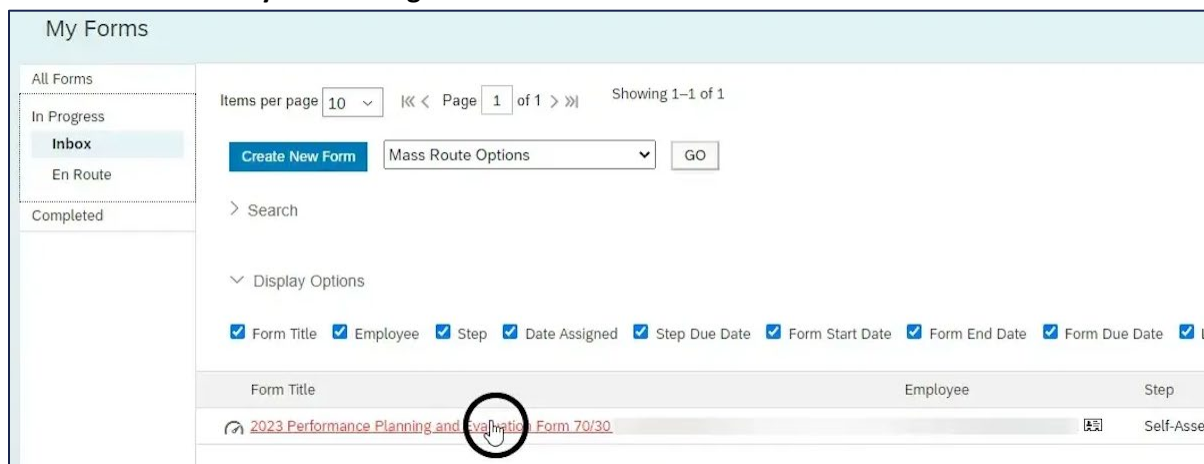
- 1. Navigation Option 1: Click on the "Go to Form" link in "For You Today" tile. This takes you directly to the form.**



- 2. Navigation Option 2: Click the "Performance" in the Home menu.**



- 3. Click the form in your "In Progress - Inbox."**



## SAVING / MOVING FORM IN ROUTE MAP

As an employee, you have months to complete your self-assessment. Document as you go, rather than gathering information and editing the form at the end of the performance year. When you update or add information, click "Save and Close," so you can continue to work on the form later.



Since this the self-assessment is not required, you can "Save and Send to Supervisor" at any time. If you do not send the form, it will automatically move to the next step at the end of the self-assessment period. However, once you send the form to your supervisor, you lose access to the self-assessment opportunity.

## SELF-ASSESSMENT: GOALS

1. For each goal, start by clicking the pencil icon to open the edit window.


NOTE: At this point in the Route Map, updating is limited to Category, Status, % Complete, and Target.




2023 Performance Planning and Evaluation Form 70/30 for

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals Competer


Goals (70.0%)

Performance  
Create 3 eLearning course   
# courses functional in LMS

Employee Rating  Select a rating...

Achievements Goal Details Other Details

There are no Achievements.

Performance  
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023   
# of trainings conducted

2. In the edit window, use the drop-down menu to change the "Status" of the goal.  
Select the appropriate status.

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

RE Q BELL

tion Discussion Acknowledgement Goals Competer

Edit Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance


\* Goal Name\*: Create 3 eLearning courses

\* How will it be measured?: # courses functional in LMS

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30.0%

Status: On Track 

% Complete:

Type:

Save as New Cancel Save Changes

Not Started  
On Track  
Behind  
Completed  
Postponed  
Cancelled

### 3. Change the % Complete.

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

9197&s\_crb=R5kb6cBcw1CD%2bZuX%2f%2b3RfRd0F5

RE Q BELL

tion Discussion Acknowledgement Goals Competen

Save as New Cancel Save Changes

### 4. If Targets are included, complete the "Actual" field.

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30.0 %

Status: Completed

% Complete: 100.0 %

Type: Department

Target	Target Date	Actual	Action
Course 1	03/03/2023	Developed PSH for Supervisors course	+
Course 2	04/28/2023	Developed ADA course	+
Course 3	06/30/2023	Developed PMGM course	+

to your plan

Date Due

1/2022 12/3

## 5. Click "Save Changes" when you are finished editing the goal.

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

9197&\_s\_crb=R5kb6cBcw1CD%2bZuX%2f%2b3Rfrd0F5tz

RE Q BELL

ion Discussion Acknowledgement Goals Competend

Save as New Cancel **Save Changes**

## 6. After you edit the goal, select the rating for the goal.

NOTE: You can click the question mark (?) icon to view the rating scale. The circle with the line through it means you were "Unable to Rate" this goal.



Goals (70.0%)

Performance

Create 3 eLearning courses

# courses functional in LMS

Employee Rating Extraordinary

Achievements Goal Details Other Details

There are no Achievements.

Performance

Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023

# of trainings conducted

Employee Rating Select a rating...

Achievements Goal Details Other Details

## 7. Use the same steps to edit all goals on your form.

# courses functional in LMS

Employee Rating <sup>?</sup>

●●●●● Extraordinary

Achievements   Goal Details   Other Details

There are no Achievements.

---

Performance

Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023

# of trainings conducted

Employee Rating <sup>?</sup>

○ ○ ○ ○ ○ ○ Select a rating...

Achievements   Goal Details   Other Details

There are no Achievements.

## 8. Type your comments about your goals in the "Employee's Comments" box.

NOTE: Your comments will be available to your supervisor and the 2nd Level Evaluator. Use this space to justify each of your goal evaluations.

Route Map   Introduction   Employee Information   Review Dates   Planning Discussion   Employee Evaluation Discussion Acknowledgement   Goals   Competencies

Achievements   Goal Details   Other Details

There are no Achievements.

Overall Comments on Goal Achievement

Employee's Comments

**B** *I* U | Size | A-Z

I created 6 eLearning classes, which is double the goal. I also attended 10 workshops, including a 3 day AR intensive.


Competencies (30.0%)

SCS Competency Model

## SELF-ASSESSMENT: COMPETENCIES

### 1. Click on the appropriate rating for each competency.

NOTE: You can review the scale by clicking on the question mark (?) icon.



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals

---

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement
- Converts ideas from general concepts into actionable plans
- Exhibits persistence in pursuit of innovation

Employee Rating ?

☐
☐
☐
☒
☐ 
 Exceeds Expectations

---

**Developing Plans**

The ability to prioritize tasks and competing demands to accomplish goals.

- Clearly defines goals and actions items to execute plans
- Considers possible changes, constraints, or other obstacles that might impact plans
- Accurately estimates time and resources need to accomplish tasks
- Makes adjustments to plans as needed

Employee Rating ?

☐
☐
☐
☐
☐ 
 Select a rating

### 2. Rate each of your competencies.

[Name] 
 ✓ 0

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals Competencies

---

Employee Rating ?

☒
☐
☐
☐
☐ 
 Exceeds Expectations

---

**Developing Plans**

The ability to prioritize tasks and competing demands to accomplish goals.

- Clearly defines goals and actions items to execute plans
- Considers possible changes, constraints, or other obstacles that might impact plans
- Accurately estimates time and resources need to accomplish tasks
- Makes adjustments to plans as needed

Employee Rating ?

☒
☐
☐
☐
☐ 
 Successful

---

**Leveraging Technology**

The ability to find, create, use, and improve technology and its related processes to further organizational goals.

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Employee Rating ?

☒
☐
☐
☐
☐ 
 Exceeds Expectations

### 3. Like the goals section, you can type comments about your performance as related to your competencies.

NOTE: Your comments will be available to your supervisor and the 2nd Level Evaluator. Use this space to justify each of your competency evaluations.



Successful

#### Leveraging Technology

The ability to find, create, use, and improve technology and its related processes to further organizational goals.

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Employee Rating ②

●●●●○ Exceeds Expectations

#### Overall Comments on Competency Achievement

Employee's Comments

Demonstrating Innovation

B I U | | : : | : : | | | | | S | A-Z |

I

### 4. To use the Writing Assistant, use the drop-down to select the competency about which you are writing.

Makes adjustments to plans as needed

Employee Rating ②

●●●●○ Successful

#### Leveraging Technology

The ability to find, create, use, and improve technology and its related processes to further organizational goals.

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Employee Rating ②

●●●●○ Exceeds Expectations

#### Overall Comments on Competency Achievement

Employee's Comments

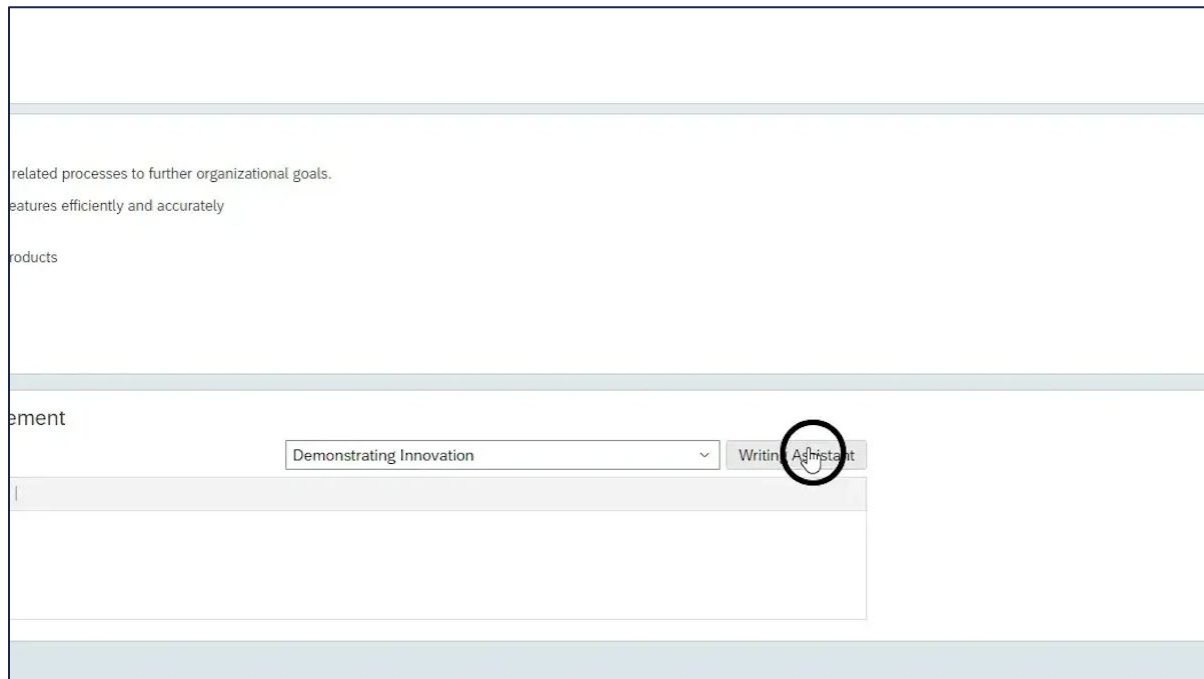
Demonstrating Innovation

Writing Assistant

B I U | | : : | : : | | | | | S | A-Z |

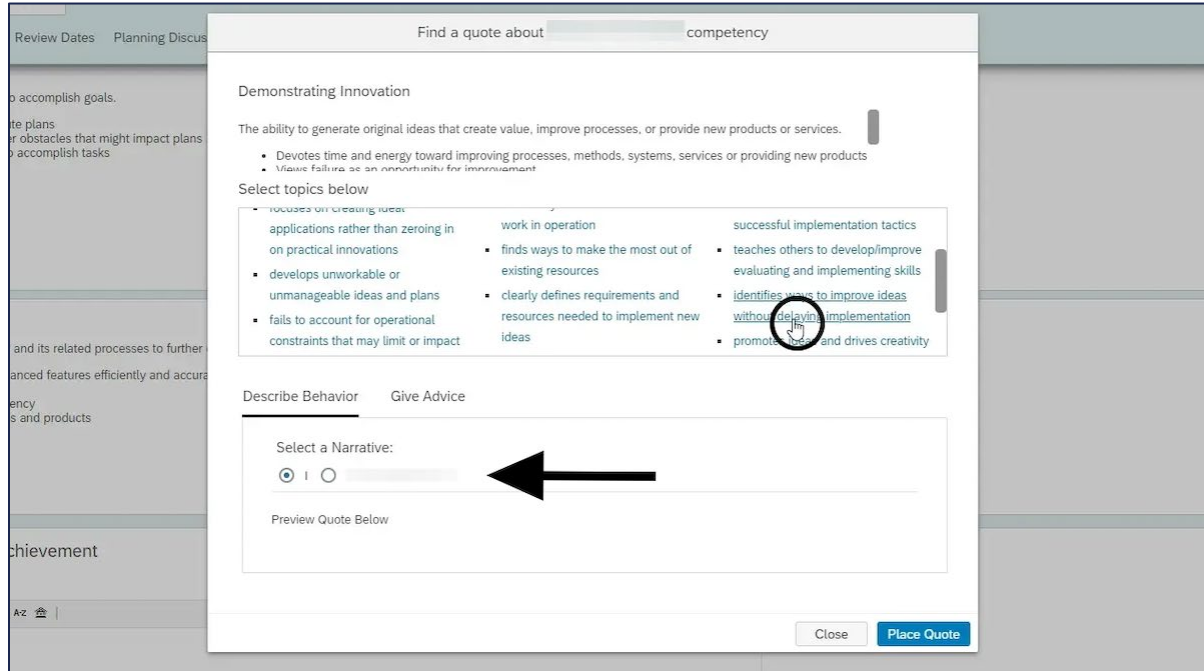
I used new software to create 2 of my classes.

## 5. Click the "Writing Assistant" button.



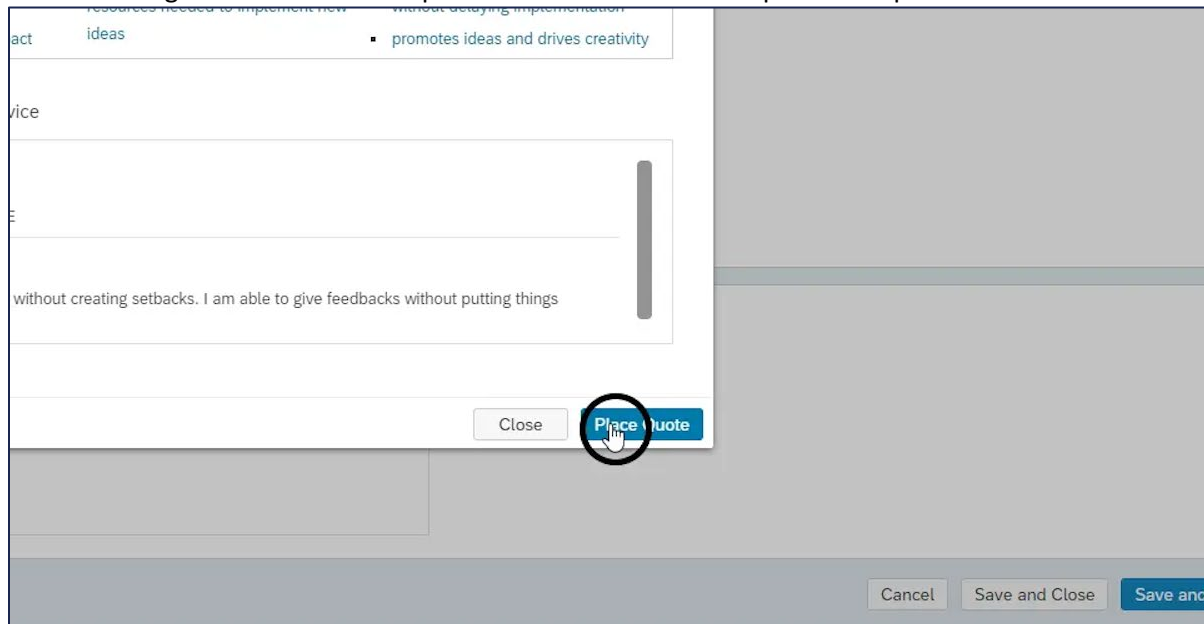
## 6. Click on the teaser statement that best aligns with your performance.

NOTE: You can also select if you want the statement written in first or third person.



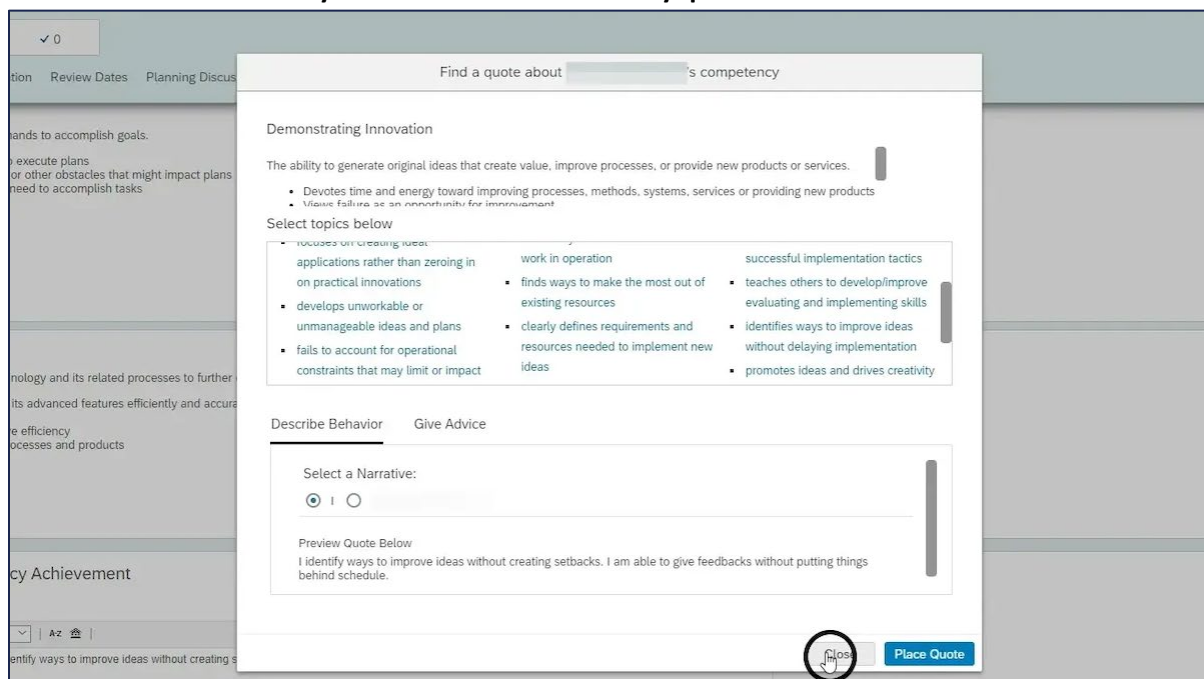
**7. The quote will appear in the "Preview Quote Below" box. Click on "Place Quote" to add the quote to your form.**

NOTE: Clicking "Place Quote" multiple times will add the same quote multiple times.



The screenshot shows a modal dialog box for selecting a quote. The dialog contains a list of quotes, with one selected: "without creating setbacks. I am able to give feedbacks without putting things". At the bottom of the dialog, there are two buttons: "Close" and "Place Quote". The "Place Quote" button is circled with a hand cursor, indicating it should be clicked. A yellow exclamation mark icon is positioned in the top right corner of the page.

**8. Click on "Close" after you have added all necessary quotes.**



The screenshot shows the same SAP SuccessFactors interface as before, but now the "Close" button at the bottom of the dialog is circled with a hand cursor, indicating it should be clicked. The dialog also shows a "Preview Quote Below" section with the selected quote: "I identify ways to improve ideas without creating setbacks. I am able to give feedbacks without putting things behind schedule."

## 9. You may edit your comments and/or the Writing Assistant quotes in the "Employee's Comments" box.

NOTE: The teaser statements in the Writing Assistant align with the quotes, but they are not identical. Please review and revise the quotes, as needed.



Accurately estimates time and resources need to accomplish tasks  
Makes adjustments to plans as needed

Employee Rating ⓘ  
●●●●○ Successful

**Leveraging Technology**  
The ability to find, create, use, and improve technology and its related processes to further organizational goals.

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Employee Rating ⓘ  
●●●●○ Exceeds Expectations

**Overall Comments on Competency Achievement**

Employee's Comments Demonstrating Innovation Writing Assistant

**B** *I* U | **1** **2** **3** **4** **5** **6** **7** **8** **9** **0** **+** **-** **A-Z** **a-z** **Link** **Image**

I used new software to create 2 of my classes. I identify ways to improve ideas without creating setbacks. I am able to give feedbacks without putting things behind schedule.

## 10. Follow the same steps to add Writing Assistant quotes about other competencies.

further organizational goals.  
# accurately

**Demonstrating Innovation** Writing Assistant

**Demonstrating Innovation**  
Developing Plans  
Leveraging Technology

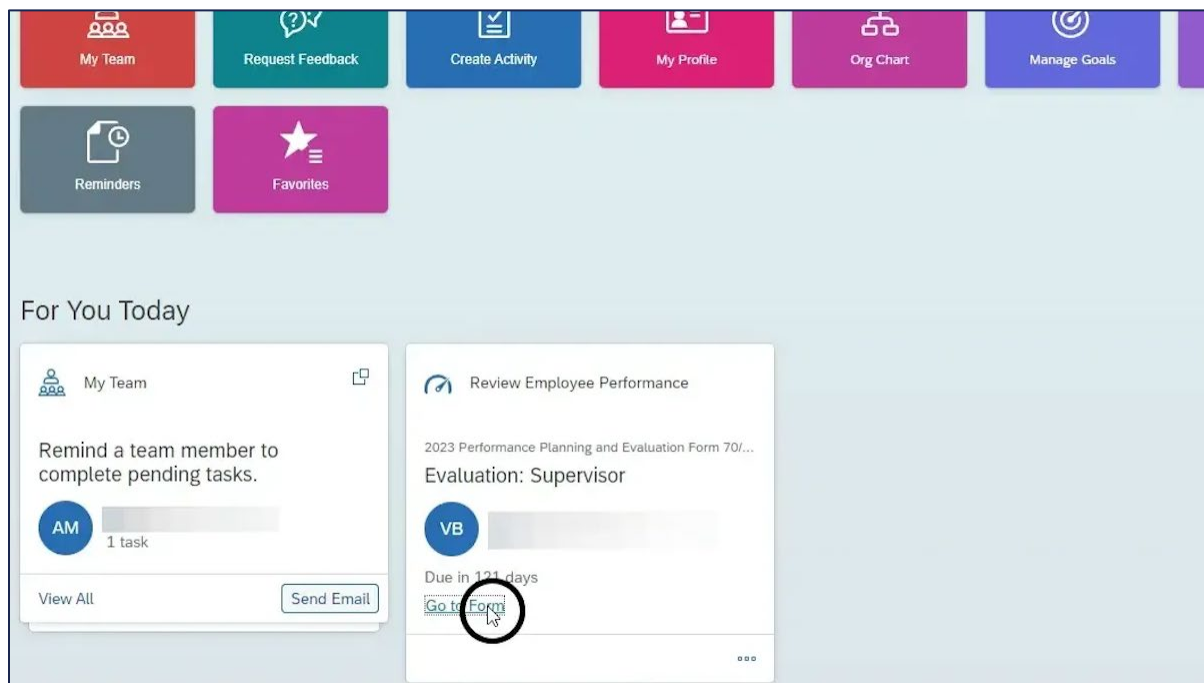
ating setbacks. I am

## SUPERVISOR EVALUATION OF EMPLOYEE

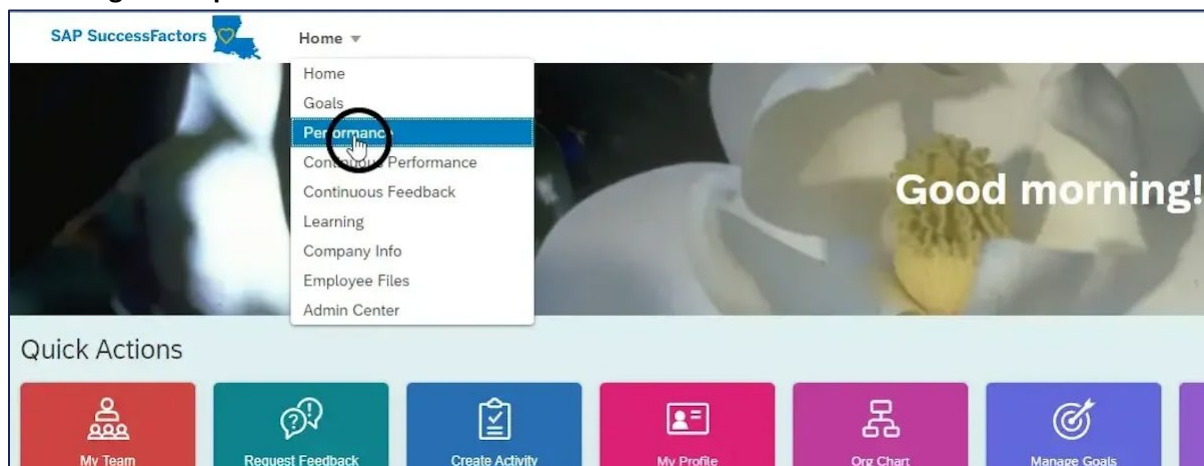
Performance evaluation is a learning opportunity for both the supervisor and the employee. Through this process, employees can learn what their supervisors view as important to be successful. Employees can, also, learn how to improve and enhance their performance through the feedback provided by their supervisors.

### NAVIGATING TO THE FORM FOR SUPERVISOR EVALUATION

- 1. Navigation Option 1: Click on the "Go to Form" link in "For You Today" tile. This takes you directly to the form.**



- 2. Navigation Option 2: Click the "Performance" in the Home menu.**



### 3. Click the form in your "In Progress - Inbox."

SAP SuccessFactors Performance

Reviews Team Overview

#### My Forms

All Forms

In Progress

**Inbox**

En Route

Completed

Items per page 10 < > Page 1 of 1 > > Showing 1–1 of 1 ☐ All ☒ My Direct Reports

[Create New Form](#) Mass Route Options

> Search

Display Options

☒ Form Title ☒ Employee ☒ Step ☒ Date Assigned ☒ Step Due Date ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Last

Form Title	Employee	Step
<a href="#">2023 Performance Planning and Evaluation Form 7030 for</a>		Evaluation: Supervisor

Items per page 10 < > Page 1 of 1 > > Showing 1–1 of 1 ☐ All ☒ My Direct Reports

## REVIEW PLANNING AND EVALUATION FORM

Before rating a goal or a competency, review all the relevant information and evidence provided about the employee's performance.



1. You may want to start your review by opening and viewing any supporting documentation you have gathered during the performance year.

NOTE: Doing this first will allow you to see what evidence has been collected, if any, for each goal, so you can factor that into the evaluation from the start.

2. This box indicates the # of required fields in the form that are currently incomplete. You must complete these fields to advance the form.

The screenshot shows the SAP SuccessFactors Review Planning and Evaluation Form. The 'Incomplete Items' dropdown menu is open, displaying a list of goals and competencies. The 'Goals' section shows 0 incomplete items, and the 'Competencies' section shows 1 incomplete item. The 'Create 3 eLearning courses' goal is highlighted.

Category	Item	Count
Goals	Create 3 eLearning courses	2
	Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023	2
	Facilitation training sessions for PMGM	2
	Complete all required annual mandatory trainings	2
	Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date	2
Competencies		1

3. Click on an item to move to that item within the form.


The screenshot shows the SAP SuccessFactors Review Planning and Evaluation Form. The 'Incomplete Items' dropdown menu is open, and the 'Create 3 eLearning courses' goal is selected, indicated by a hand cursor.

Category	Item	Count
Goals	Create 3 eLearning courses	2
	Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023	2
	Facilitation training sessions for PMGM	2
	Complete all required annual mandatory trainings	2
	Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date	2
Competencies		1

#### 4. Update the goal, if necessary.

Goals (70.0%)






Performance

Create 3 eLearning courses 

# courses functional in LMS

\* Supervisor Rating ⓘ  
●○○○○○ Select a rating...

\* Supervisor's Comments

**B** *I* U |    | Size  | A-Z 

Achievements   Goal Details   Other Details

There are no Achievements.

#### 5. Review the Status and Employee Rating.

30.0% of total score

**Completed**


Ratings from Others

Employee Rating ⓘ  
●●●●● 5.0 - Extraordinary



Support

6. Click on "Goal Details" to view more information including all goal fields and comments.








Goals (70.0%)

Performance  
Create 3 eLearning courses 

# courses functional in LMS


\* Supervisor Rating   
 Select a rating...

\* Supervisor's Comments

**B** *I* U |      Size  | A-Z 



Achievements **Goal Details** Other Details

There are no Achievements.








Performance  
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023 

7. Click "Other Details" to view Target information.

# courses functional in LMS

\* Supervisor Rating   
 Select a rating...

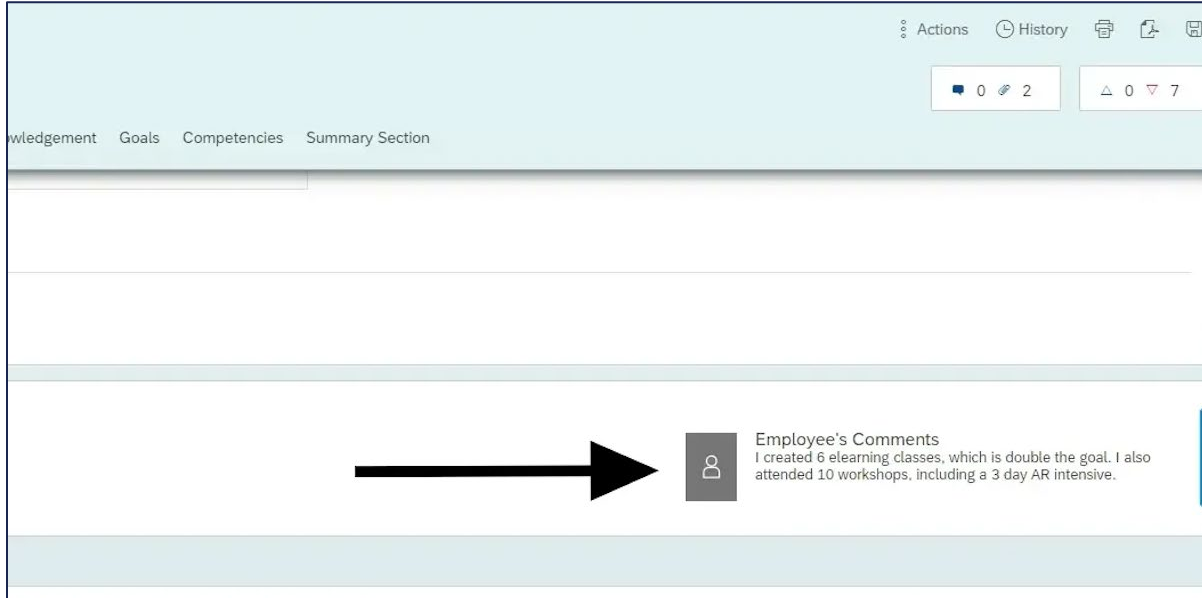
\* Supervisor's Comments

**B** *I* U |      Size  | A-Z 

Achievements Goal Details **Other Details**

Target:

Target Date	Course 1
Actual	02/01/2023
	1
Target Date	Course 2
Actual	04/07/2023
	2
Target Date	Course 3
Actual	08/01/2023
	3

**8. Scroll down to review the "Employee's Comments."**

The screenshot displays the SAP SuccessFactors interface, specifically the Summary Section. The top navigation bar includes tabs for Knowledge, Goals, Competencies, and Summary Section. The Summary Section is active, showing a list of items. A large black arrow points to the "Employee's Comments" entry. The entry details are as follows:

Employee's Comments
I created 6 elearning classes, which is double the goal. I also attended 10 workshops, including a 3 day AR intensive.

On the right side of the page, there is a yellow circular icon with a black exclamation mark.

## UPDATING GOALS

At this point in the Route Map, editing is limited to Category, Status, % Complete, and Target(s). During the self-assessment, your employee may have edited the goals on the form. As the supervisor, you, also, have the opportunity to edit the same fields in the goals.





### 1. For each goal, start by clicking the pencil icon to open the edit window.

2023 Performance Planning and Evaluation Form 70/30 for

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals Competency


Goals (70.0%)

Performance  
Create 3 eLearning courses   
# courses functional in LMS

Employee Rating   
○○○○○○○ Select a rating...

Achievements Goal Details Other Details

There are no Achievements.

Performance  
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023   
# of trainings conducted

### 2. In the edit window, use the drop-down menu to change the "Status" of the goal. Select the appropriate status.

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

Edit Goal

Edit your goal below.

Fields marked with \* are required.

Category: Performance


\* Goal Name\*: Create 3 eLearning courses

\* How will it be measured?: # courses functional in LMS

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30.0%

Status: On Track 

% Complete: 0.0%

Type: On Track, Behind, Completed, Postponed, Cancelled

Save as New Cancel Save Changes

### 3. Change the % Complete.

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

9197&s\_crb=R5kb6cBcw1CD%2bZuX%2f%2b3RFrd0F5

RE Q BELL

tion Discussion Acknowledgement Goals Competen

Save as New Cancel Save Changes

### 4. If Targets are included, complete the "Actual" field.

spell check... legal scan...

\* Start Date: 01/01/2022

\* Due Date: 12/31/2022

\* Weight: 30.0 %

Status: Completed

% Complete: 100.0 %

Type: Department

Target	Target Date	Actual	Action
Course 1	03/03/2023	Developed PSH for Supervisors course	+ ↑ ↓ 🗑
Course 2	04/28/2023	Developed ADA course	+ ↑ ↓ 🗑
Course 3	06/30/2023	Developed PMGM course	+ ↑ ↓ 🗑

to your plan

Date Due

1/2022 12/3

**5. Click "Save Changes" when you are finished editing the goal.**

hcm41preview.sapsf.com/tgmEdit?t=1&excPri=false&u=P00349197&f=1320&d=-1&s=6&fsid=P00349...

9197&\_s.crb=R5kb6cBcw1CD%2bZuX%2f%2b3Rfrd0F5tz

### Edit Goal

Edit your goal below.

\* Due Date: 12/31/2022

\* Weight: 30.0%

Status:

% Complete:  %

Type: Agency

Target:

	Target Date	Actual	Action
Course 1	02/01/2023	<input type="text" value="1"/>	
Course 2	04/07/2023	<input type="text" value="2"/>	
Course 3	08/01/2023	<input type="text" value="3"/>	

Save as New Cancel **Save Changes**

RE Q BELL

ion Discussion Acknowledgement Goals Competend

## SUPERVISOR EVALUATION: GOALS

In addition to reviewing the documentation gathered throughout the year, here some additional best practices to keep in mind while you are evaluating your employee's performance:

1. Evaluate the goals as written. Your performance evaluation is limited to the goals that you included on the employee's performance planning and evaluation form. If you did not include a goal in the planning form, you cannot evaluate the employee on it.
2. Focus on the employee's performance, rather than their personality. Remain objective about the employee's performance and give specific examples of an employee's actions as they relate to the established goals.
3. Consider the measure for success established during the planning process. Did your employee meet that metric? If so, what evidence do you have to support your evaluation? Use the rating scale to help you determine the level at which your employee achieved success
4. Remove as much bias from ratings as possible. This includes making sure a rating is based on performance throughout the year, not just the last few weeks before evaluation. It means making sure similarly situated employees are treated similarly, i.e., behaviors that are rewarded or punished for one employee are rewarded or punished for all employees.

**OUTSTANDING**

**5**

Performance levels and accomplishments far exceed normal expectations. This category is reserved for the employee who truly stands out and clearly and consistently demonstrates exceptional accomplishments in terms of quality and quantity of work that is easily recognized as truly exceptional by others.

**EXCEEDS EXPECTATIONS**

**4**

Performance frequently exceeds job requirements. Accomplishments are regularly above expected levels. Performance is sustained and uniformly high with thorough and on time results.

**SUCCESSFUL**

**3**

Performance clearly and fully meets all the requirements of the position in terms of quality and quantity of work. It is described as good, solid performance. Minor deviations may occur, the overall level of performance meets or slightly exceeds all position requirements.

**NEEDS IMPROVEMENT**

**2**

Performance is noticeably less than expected. Usually performs to and meets job requirements, however the need for further development and improvement is clearly recognized.

**UNSUCCESSFUL**

**1**

Performance must improve significantly within a reasonable period of time if the individual is to remain in this position. Employee is not performing to the requirements of the job.

## HOW TO COMPLETE GOAL EVALUATION SECTION

### 1. Scroll to the Goals section of the form OR click "Goals" to advance to that section.

**SAP SuccessFactors** Performance

Reviews Team Overview

Back to: Inbox

2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement **Goals** Competencies Summary Section

**Route Map**

Assessment

1 Initial Planning: Supervisor 2 Initial Planning Session: 2nd Level Evaluator 3 Planning Discussion 4 Self-Assessment 5 Evaluation: Supervisor Due 02/15/2023

**Introduction**

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback on the can build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning. This new online tool provides evaluators, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating performance evaluation, please refer to the State Civil Service Rules, Chapter 10.

**Employee Information**

Last Name	[Redacted]	First Name	[Redacted]
Job Title	HUMAN RESOURCES CONSULTANT C	Job Code	00170860
Personnel Area Description	CS-State Civil Service	Org Unit Description	SCS-TALENT DEVELOPMENT

**Review Dates**

### 2. To review the Ratings Scale, click the question mark (?) icon.

**Goals (70.0%)**

Performance

Create 3 eLearning courses

# courses functional in LMS

\* Supervisor Rating

1 2 3 4 5 6 7 8 9 10

\* Supervisor's Comments


B I U | | | | | | | | | | Size | Az |

**Achievements** **Goal Details** **Other Details**


Goal Name*	Create 3 eLearning courses	How will it be measured?
Start Date	01/01/2022	Due Date
% Complete	100.0%	Type
Comments	1. 10/14/2022 These classes are part of the new onboarding program. You will collaborate with C. Smith in HR will be the subject matter expert for this project.	Status

### 3. Scroll to review the Ratings Scale.

Goals (70.0%)











Performance  
Create 3 eLearning courses 

# courses functional in LMS

\* Supervisor Rating 

⊖ ○ ○ ○ ○ ○ ○

\* Supervisor's Comments

**B I U** |  |  |  |  |  |  |  |  Size  | **Az** 

Achievements

Goal Name\*

Start Date

% Complete

Comments


I. LACI L TALLEY  
10/14/2022  
These classes are part of the new onboarding program. You will collaborate with C. Smith in HR will be the subject matter expert for this project.

How will it be measured?

Due Date

Type

Status

**Performance Rating Scale** 

exceeds all position requirements.

4.0 Exceeds Expectations:  
Performance frequently exceeds job requirements. Accomplishments are regularly above expected levels. Performance is sustained and uniformly high with thorough and on time results.


5.0 Extraordinary:  
Performance levels and accomplishments far exceed normal expectations. This category is reserved for the employee who truly stands out and clearly and consistently demonstrates exceptional accomplishments in terms of quality and quantity of work that is easily recognized as truly exceptional by others.

### 4. The circle with the line through it means you were "Unable to Rate" this goal.


Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals

By checking this box, I acknowledge that I received the planning and understand that my failure to meet this goal is my responsibility for the performance year.

Goals (70.0%)











Performance  
Create 3 eLearning courses 

# courses functional in LMS

\* Supervisor Rating 

⊖ ○ ○ ○ ○ ○ ○ Unable to Rate

\* Supervisor's Comments

**B I U** |  |  |  |  |  |  |  |  Size  | **Az** 

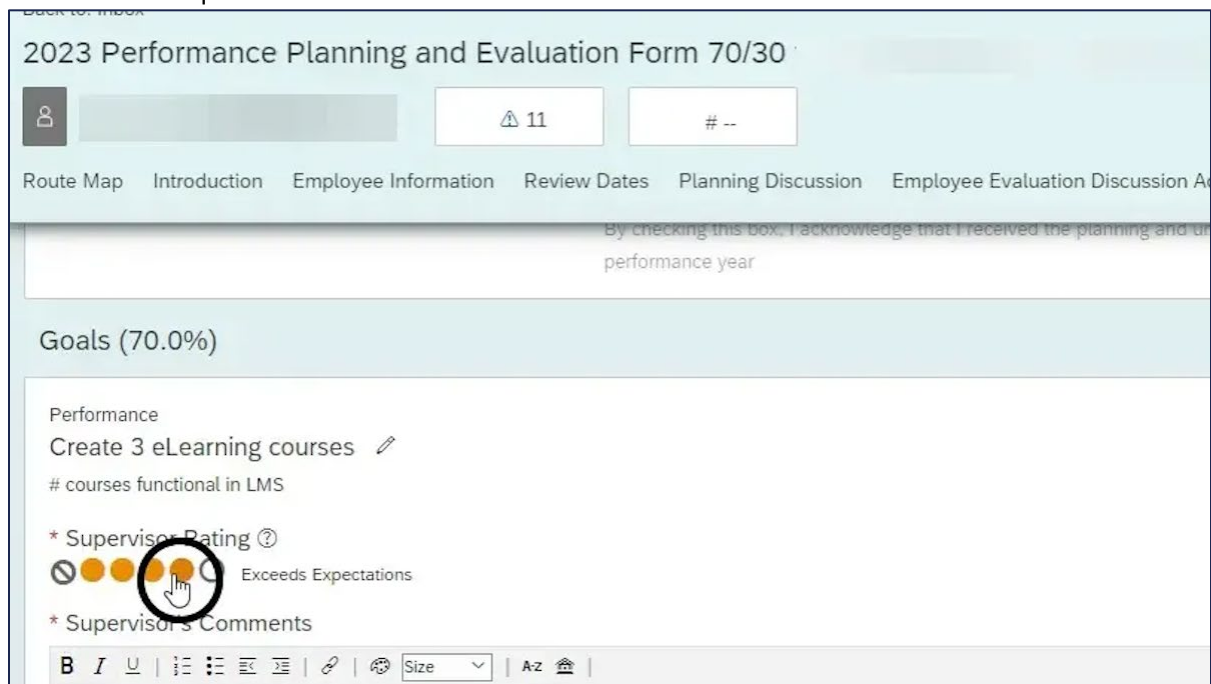
Achievements

Goal Details

Other Details

5. Based on the documentation presented, rate the employee's performance for each goal. Click on the appropriate circle for the rating selected.

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



2023 Performance Planning and Evaluation Form 70/30

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion A

By checking this box, I acknowledge that I received the planning and evaluation discussion for the performance year

Goals (70.0%)

Performance  
Create 3 eLearning courses

# courses functional in LMS

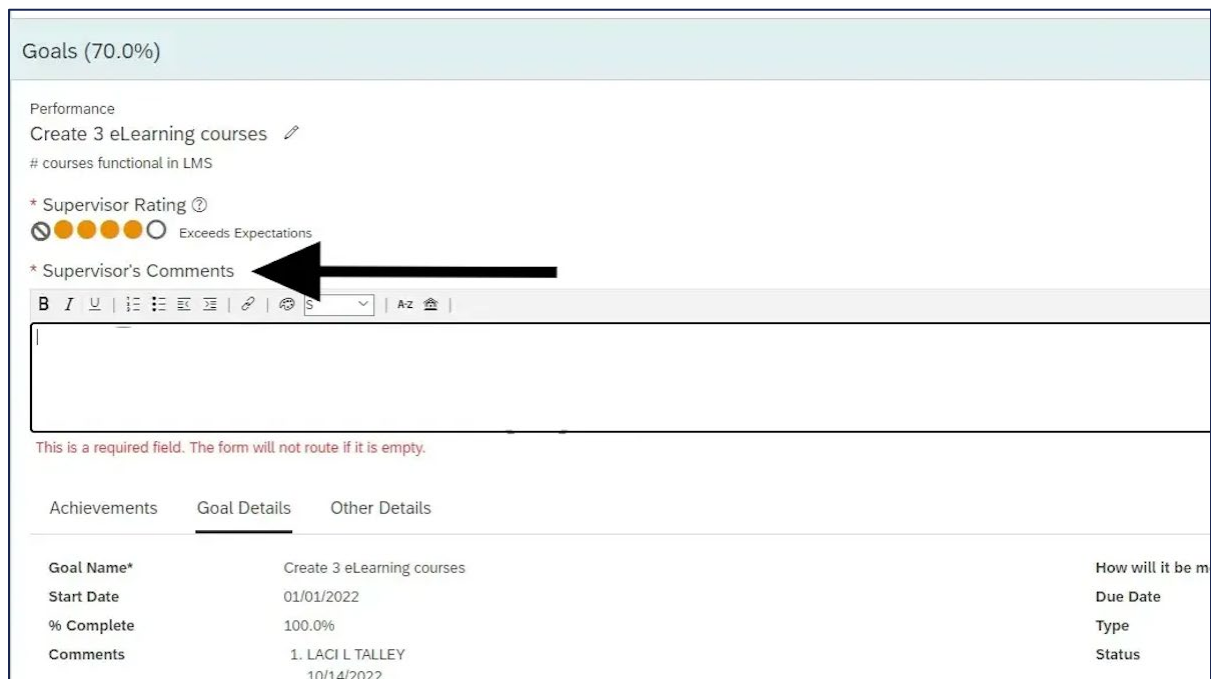
\* Supervisor Rating Exceeds Expectations

\* Supervisor's Comments

B I U | | | | | | | | | | Size | A-Z |

6. Type your justification for this rating in the "Supervisor's Comments" field.

NOTE: 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.



Goals (70.0%)

Performance  
Create 3 eLearning courses

# courses functional in LMS

\* Supervisor Rating Exceeds Expectations

\* Supervisor's Comments

B I U | | | | | | | | | | Size | A-Z |

This is a required field. The form will not route if it is empty.

Achievements Goal Details Other Details

Goal Name*	Create 3 eLearning courses	How will it be measured?
Start Date	01/01/2022	Due Date
% Complete	100.0%	Type
Comments	1. LACI L TALLEY 10/14/2022	Status

**7. Use the same steps to evaluate all goals on the form.**

Performance  
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023

# of trainings conducted

\* Supervisor Rating

Exceeds Expectations

\* Supervisor Comments

**B** *I* U | Size | A-Z

Achievements   Goal Details   Other Details

There are no Achievements.

Performance  
Facilitation training sessions for PMGM

## SUPERVISOR EVALUATION: COMPETENCIES

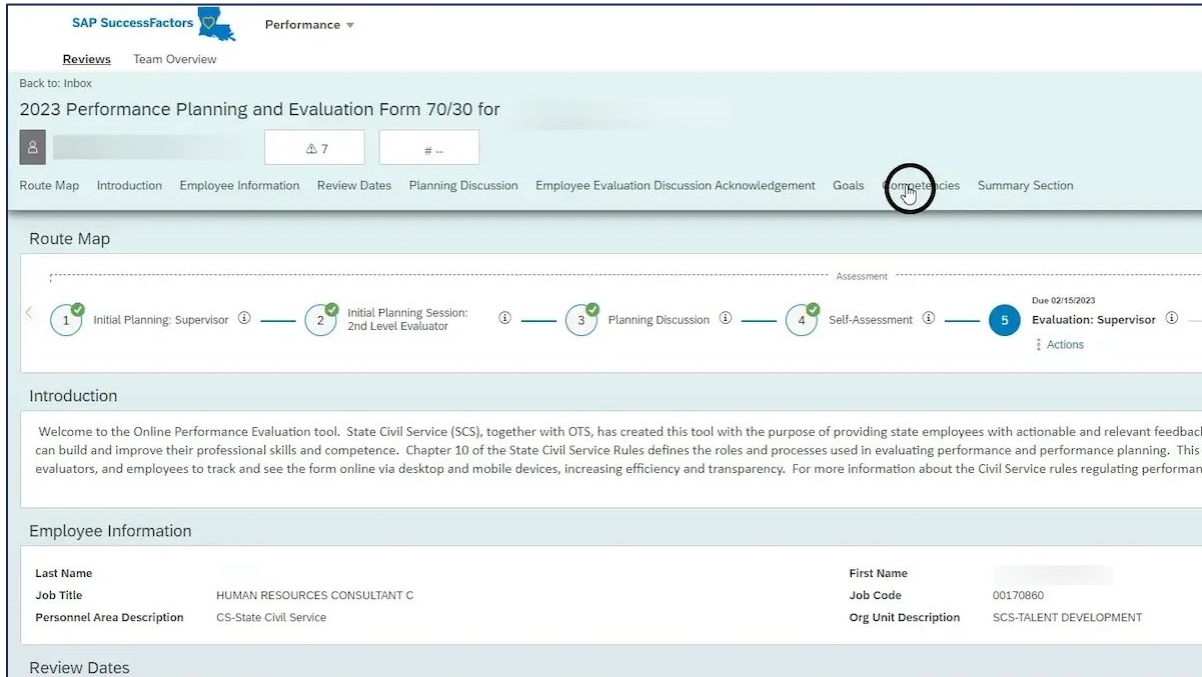
The second part of the performance management form focuses on evaluating your employee and the competencies selected.

Here are several recommendations/best practices for evaluating competencies:

1. Keep in mind that some competencies require significant practice and experience to master. Some competencies will almost certainly take longer to develop than any one performance year. These competencies are “buy” competencies. Should you choose one of these competencies for your employee to work on during the performance year, do not punish them at the end of the rating period with a poor assessment on this competency if they have taken steps to develop it but have not yet achieved mastery.
  2. A good rule of thumb for rating competencies is to consider not only competency mastery but also effort towards mastery. As mentioned above, some competencies take more time to develop than others. If your employee is making an effort to develop the competence but needs more experience or coaching to master it, do not squelch their efforts by a poor competency evaluation.
  3. Keep in mind that honest conversations regarding competency mastery become more difficult once evaluation is included. Be sure to keep conversations on evaluation as objective as possible. Talk about the behaviors observed and results achieved instead of subjective feelings.
  4. Establish safe spaces for employees to practice competencies and to fail without punishment. True learning often happens when individuals fail. If failure is never allowed, then learning opportunities dwindle. Sometimes safe spaces must be built in by giving some extra time for a new task to be completed, or by giving practice opportunities.
-

## HOW TO COMPLETE COMPETENCIES SECTION

### 1. Scroll to the Competencies section of the form OR click "Competencies" to advance to that section.



SAP SuccessFactors Performance

Reviews Team Overview

Back to: Inbox

2023 Performance Planning and Evaluation Form 70/30 for [Employee Name]

7 # --

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies** Summary Section

Route Map

Assessment

1 Initial Planning: Supervisor 2 Initial Planning Session: 2nd Level Evaluator 3 Planning Discussion 4 Self-Assessment 5 Evaluation: Supervisor

Due 02/15/2023

Introduction

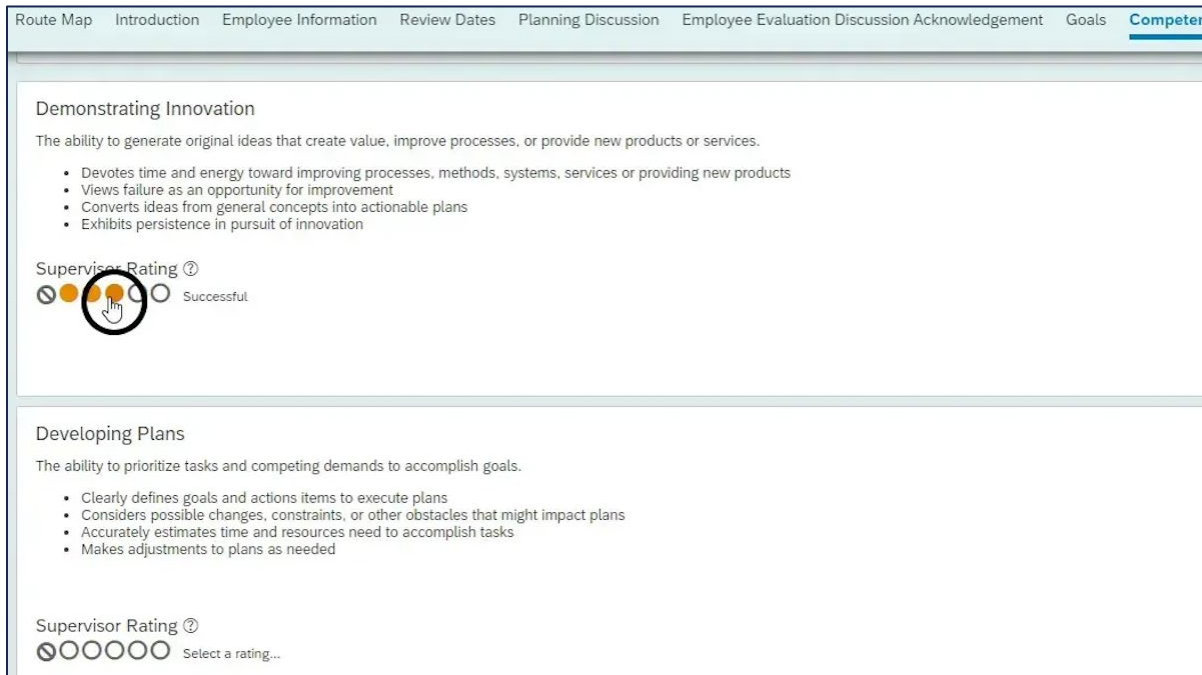
Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback can build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning. This tool provides evaluators, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating performance

Employee Information

Last Name	Job Title	HUMAN RESOURCES CONSULTANT C	First Name	
Personnel Area Description	CS-State Civil Service		Job Code	00170860
			Org Unit Description	SCS-TALENT DEVELOPMENT

Review Dates

### 2. Based on the documentation presented, rate the employee's performance for every competency. Click on the appropriate circle for the rating selected.



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies**

Demonstrating Innovation

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement
- Converts ideas from general concepts into actionable plans
- Exhibits persistence in pursuit of innovation

Supervisor Rating ?

1 2 3 4 5 Successful

Developing Plans

The ability to prioritize tasks and competing demands to accomplish goals.

- Clearly defines goals and actions items to execute plans
- Considers possible changes, constraints, or other obstacles that might impact plans
- Accurately estimates time and resources need to accomplish tasks
- Makes adjustments to plans as needed

Supervisor Rating ?

1 2 3 4 5 Select a rating...



### 3. Type your comments about your employee's performance as related to all competencies.

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



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies** Summary

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Supervisor Rating ⓘ  
 Extraordinary

Overall Comments on Competency Achievement

\* Supervisor's Comments Demonstrating Innovation Writing Assistant

**B** *I* U | | Size | A-Z |

I

Summary Section

### 4. To use the Writing Assistant, use the drop-down to select the competency about which you are writing. Then, Click the "Writing Assistant" button.

es Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies** Summary Section

s efficiently and accurately

ts

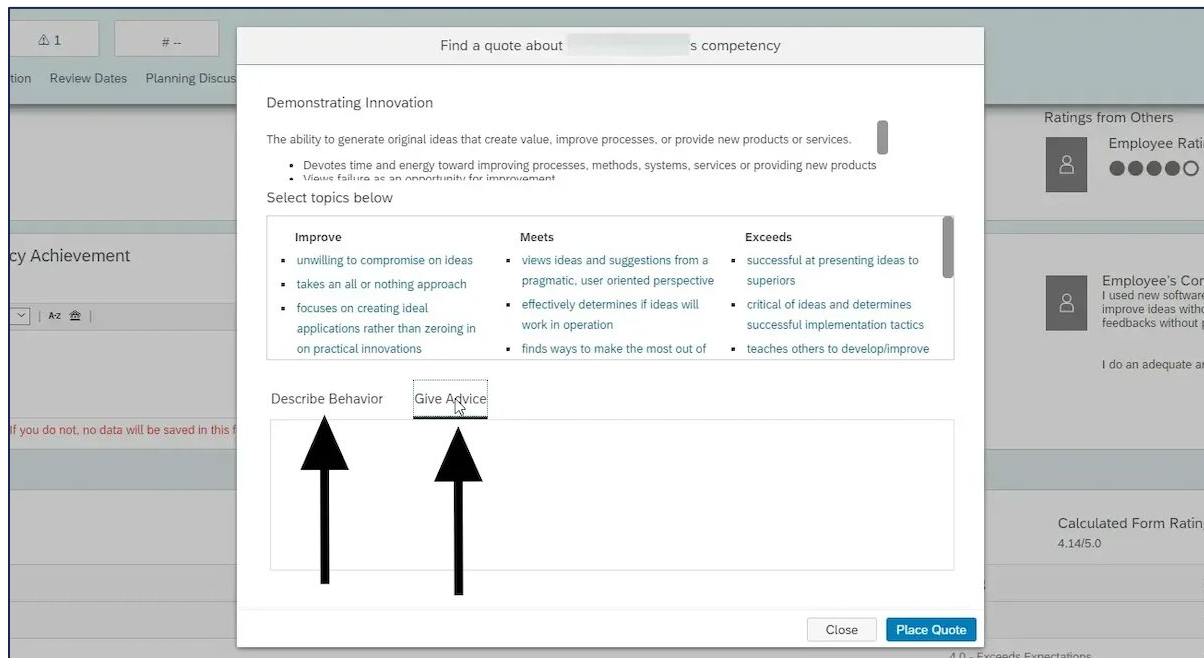
Ratings fr

nt

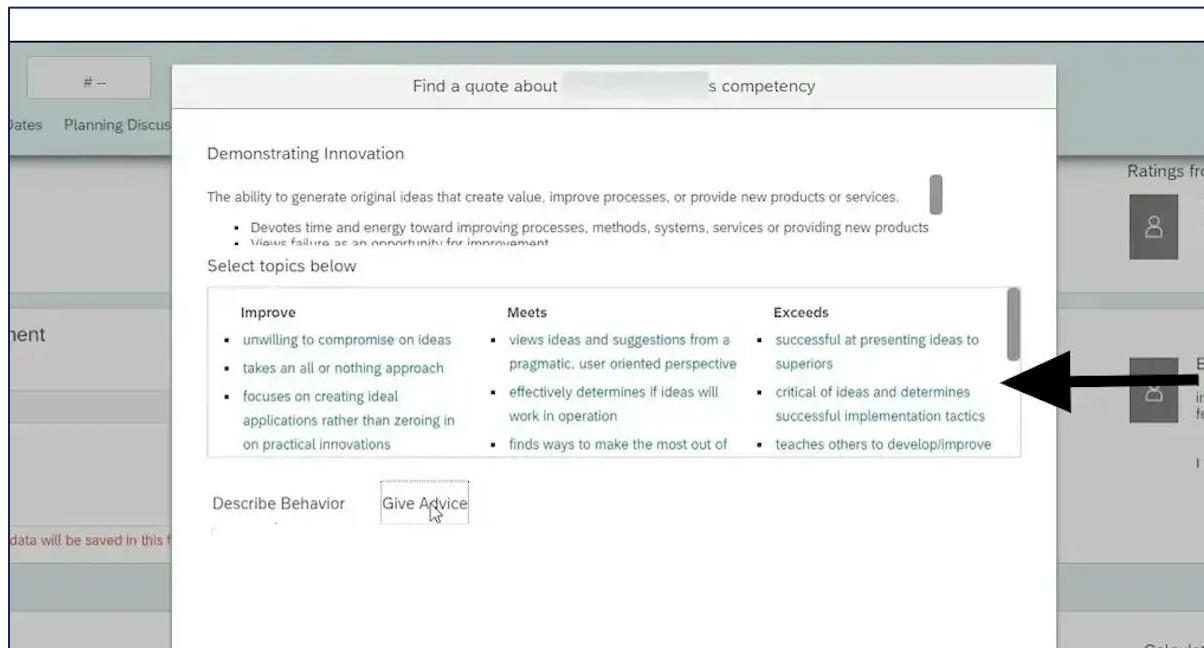
Demonstrating Innovation **Writing Assistant**

Calcula  
3.86/5.0

**5. When you use the Writing Assistant, you can choose to "Describe Behavior" or to "Give Advice" as it relates to the selected competency.**



**6. Click on the phrase that best describes how you want to rate your employee or for which you want to give advice.**



## 7. Use "Give Advice" when you want to suggest methods for your employee to develop a competency.



Find a quote about [ ] s competency

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement

Select topics below

- fails to account for operational constraints that may limit or impact the ability to execute ideas
- moves slowly from ideas to implementation
- resources needed to implement new ideas
- approaches innovation with a practical, task oriented mindset
- converts ideas from general concepts into actionable plans
- without delaying implementation
- promotes ideas and drives creativity
- develops creative, easy, executable ideas

Describe Behavior **Give Advice**

Close Place Quote

## 8. Multiple "Behavioral and Development Suggestions and Resources" will appear.

Find a quote about [ ] s competency

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement

Select topics below

- fails to account for operational constraints that may limit or impact the ability to execute ideas
- moves slowly from ideas to implementation
- resources needed to implement new ideas
- approaches innovation with a practical, task oriented mindset
- converts ideas from general concepts into actionable plans
- without delaying implementation
- promotes ideas and drives creativity
- develops creative, easy, executable ideas

Describe Behavior **Give Advice**

Behavioral and Development Suggestions and Resources

Before moving forward with an idea it is important to evaluate how realistic and idea is. Challenge ideas in order to help make them better. Place Quote

Be honest and realistic when evaluating ideas. Try not to be over-optimistic. Pushing forward with a positive attitude is essential to success. Be honest and realistic when evaluating ideas. Place Quote

Close Place Quote

## 9. Click the "Place Quote" button to select the advice you would like to add to the form.

NOTE: Do not click the "Place Quote" button at the bottom right. This defaults to the "Describe Behavior" statements.

Find a quote about [ ]'s competency

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement

Select topics below

- fails to account for operational constraints that may limit or impact the ability to execute ideas
- moves slowly from ideas to implementation
- resources needed to implement new ideas
- approaches innovation with a practical, task oriented mindset
- converts ideas from general concepts into actionable plans
- without delaying implementation
- promotes ideas and drives creativity
- develops creative, easy, executable ideas

Describe Behavior Give Advice

When addressing or helping someone else develop ideas be sure to be critical but polite to the individuals or teams behind the ideas. Be courteous of others while simultaneously seeking weaknesses in ideas.

**Place Quote**

Close

Ratings from Others

Employee Rating: 4.0

Employee's Comment: I used new software to improve ideas without feedbacks without putting

I do an adequate amount of

Calculated Form Rating: 4.14/5.0

We

70.0

4.0 - Exceeds Expectations 30.0

## 10. When giving advice, the quotes appear directly in the "Supervisor's Comments." You can place multiple quotes from those listed.

Find a quote about [ ]'s competency

**Demonstrating Innovation**

The ability to generate original ideas that create value, improve processes, or provide new products or services.

- Devotes time and energy toward improving processes, methods, systems, services or providing new products
- Views failure as an opportunity for improvement

Select topics below

Improve	Meets	Exceeds
<ul style="list-style-type: none"> <li>unwilling to compromise on ideas</li> <li>takes an all or nothing approach</li> <li>focuses on creating ideal applications rather than zeroing in on practical innovations</li> </ul>	<ul style="list-style-type: none"> <li>views ideas and suggestions from a pragmatic, user oriented perspective</li> <li>effectively determines if ideas will work in operation</li> <li>finds ways to make the most out of</li> </ul>	<ul style="list-style-type: none"> <li>successful at presenting ideas to superiors</li> <li>critical of ideas and determines successful implementation tactics</li> <li>teaches others to develop/improve</li> </ul>

Describe Behavior Give Advice

Behavioral and Development Suggestions and Resources

Before moving forward with an idea it is important to evaluate how realistic an idea is. Challenge ideas in order to help make them better.

**Place Quote**

Be honest and realistic when evaluating ideas. Try not to be over-optimistic. Pushing forward

Ratings from Others

Employee Rating: 4.0

Employee's Comment: I used new software to improve ideas without feedbacks without putting

I do an adequate amount of

Calculated Form Rating: 4.14/5.0

We

70.0

4.0 - Exceeds Expectations 30.0

## 11. Click on "Close" after you have added all necessary quotes.

han zeroing in work in operation successful implementation tactics

ons

- finds ways to make the most out of
- teaches others to develop/improve

Give Advice

elopment Suggestions and Resources

ard with an idea it is important to evaluate how realistic and idea is. order to help make them better.

Place Quote

stic when evaluating ideas. Try not to be over-optimistic. Pushing forward

Place Quote

Close

Place Quote

Calculated Form Rating:  
4.14/5.0

	Weight
	70.0% of total s
exceeds Expectations	30.0%
exceeds Expectations	30.0%
successful	10.0%
5.0 - Extraordinary	15.0%
5.0 - Extraordinary	15.0%
4.0	30.0% of total s

## 12. Repeat the steps to add comments about each competency.

NOTE: You are not required to comment on each competency. However, you may want to comment on each to support and to justify your ratings and provide guidance for your employee.



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies** Summary

- Operates existing technology while using its advanced features efficiently and accurately
- Adapts quickly to new technology
- Seeks other technologies that can improve efficiency
- Uses technology to streamline existing processes and products

Supervisor Rating ②

●●●●● Extraordinary

Overall Comments on Competency Achievement

\* Supervisor's Comments

Demonstrating Innovation

Demonstrating Innovation

Developing Plans

Leveraging Technology

Writing Assistant

KENTASCHRE

Using AR was amazing. VACKENTASCHRE promotes ideas and helps drive the creativity of others. By support develops creative, easy, and executable ideas.

Summary Section

Name

**13. You may edit your comments and/or the Writing Assistant quotes in the "Supervisor's Comments" box.**

NOTE: The teaser statements in the Writing Assistant align with the quotes, but they are not identical. Please review and revise the quotes, as needed.



cy Achievement

Developing Plans Writing Assistant

notes ideas and helps drive the creativity of others. By supporting others VACKENTASCHRE helps create implementable ideas. VACKENTASCHRE

obstacles and develop basic contingency plans to deal with them. VACKENTASCHRE develops realistic long-range plans. VACKENTASCHRE breaks large most part stays focused on the big picture. VACKENTASCHRE does an adequate amount of planning and generally considers the factors that affect project detail in plans to make sure all issues and potential pitfalls have been considered.

**14. Click "Save and Close" to review evaluation gaps and other information, prior to sending it to your 2nd Level Evaluator.**

Select a rating...	15.0%
Select a rating...	15.0%
4.0	30.0% of total score
3.0 - Successful	
4.0 - Exceeds Expectations	
5.0 - Extraordinary	

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

## FINAL EVALUATION REVIEW

While not required, conducting a review will allow you to check the form, the ratings, and your comments. You may also want to note the Gap Analysis and verify your ratings.



### 1. At this point, only certain Actions are available.

The screenshot shows the SAP SuccessFactors interface. The top navigation bar includes tabs for 'Editing | Writing Assistant - Givi...', 'Select Describe', and 'Post Attendee - Zoom'. The main content area has a search bar and a navigation menu. The 'Actions' menu is circled, showing options like 'History', 'Print', 'Download', and 'Save'. Below the navigation menu, there are statistics: '0' and '2' for one category, and '5' and '2' for another. The main content area displays 'Ratings from Others' and 'Employee Rating' with a 4.0 rating and 'Exceeds Expectations'.

### 2. You may want to do a spell check and legal scan of the entire form.

The screenshot shows the same SAP SuccessFactors interface. The 'Actions' menu is expanded, and the 'Spell Check the entire form' option is circled. Other options visible are 'Scan the entire form' and 'Info about this form'. The rest of the interface, including the search bar, navigation menu, and 'Ratings from Others' section, remains the same.



**3. Check for Incomplete Items. If you have any Incomplete Items, these must be completed before you can move the form in the Route Map.**

2023 Performance Planning and Evaluation Form 70/30 for [Redacted]

[Redacted] Incomplete Items Out of 3

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals Complete

### Route Map

1 Initial Planning: Supervisor 2 Initial Planning Session: 2nd Level Evaluator 3 Planning Discussion 4 Self-Assessment

### Introduction

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback on their current job performance, as well as a platform from which employees can build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning. This new online tool fulfills those rules, and will allow supervisors, 2nd level evaluators, and employees to track and see the form 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](#).

### Employee Information

Last Name [Redacted] First Name [Redacted]  
Job Title HUMAN RESOURCES CONSULTANT C Job Code [Redacted]

**4. Click the "Gap Analysis" box to view gaps in the evaluation.**

NOTE: The "Gap Analysis" indicates when the employee ratings are higher or lower than the supervisor ratings. Also, the employee is not required to do a self-assessment, so you may not see employee ratings, comments, or a gap analysis.



Actions History [Icons]

0 2 Supporting 5 2 Gap Analysis

Assessment

4 Self-Assessment 5 Evaluation: Supervisor Due 02/15/2023 6 Evaluation: 2nd Level Evaluator 7 Evaluation: Discussion


Support

Less

First Name [Redacted]


## 5. The "Gap Analysis" indicates when the employee ratings are higher or lower than your ratings.

NOTE: You may want to use this information to guide your Evaluation Discussion.



Acknowledgement		Goals		Gap Analysis		
		5 items rated higher than '1'		2 items rated lower than		
Assessment		<b>Goals (3)</b>	<b>Gap</b>	<b>Goals (1)</b>	<b>Gap</b>	
4 Self-Assess		Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023	+1.0	Create 3 eLearning courses	-1.0	
		Facilitation training sessions for PMGM	N/A	<b>Competencies (1)</b>	<b>Gap</b>	
		Complete all required annual mandatory trainings	+2.0	Demonstrating Innovation	-1.0	
		<b>Competencies (2)</b>	<b>Gap</b>			
		Developing Plans	+1.0			
		Leveraging Technology	+1.0			
with the purpose of providing ples and processes used in ev nsparency. For more inform						
First Name		VACKENTASCHRE				
Job Code		00170860				
Org Unit Description		SCS-TALENT DEVELOPMENT				

## 6. The system automatically calculates the employee's overall score based on the ratings assigned by you, the supervisor.



Rating		Weight
4.2		70.0% of total score
4.0 - Exceeds Expectations		30.0%
4.0 - Exceeds Expectations		30.0%
3.0 - Successful		10.0%
5.0 - Extraordinary		15.0%
5.0 - Extraordinary		15.0%
4.0		30.0% of total score
3.0 - Successful		
4.0 - Exceeds Expectations		
5.0 - Extraordinary		

Calculated Form Rating: 4.14/5.0

## 7. Add "Overall Comments on Performance."

NOTE: This is not required. Use this space to comment on performance outside of formal goals and competencies.

Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023
Facilitation training sessions for PMGM
Complete all required annual mandatory trainings
Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date
Competencies
Demonstrating Innovation
Developing Plans
Leveraging Technology
Overall Comments on Performance
Supervisor's Comments



8. "Save and Close" the form if you would like to continue to work on the form. Click "Save and Send to 2nd Level Evaluator" if you are finished with the form.

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.

4.2	70.0% of total score
4.0 - Exceeds Expectations	30.0%
4.0 - Exceeds Expectations	30.0%
3.0 - Successful	10.0%
5.0 - Extraordinary	15.0%
5.0 - Extraordinary	15.0%
4.0	30.0% of total score
3.0 - Successful	
4.0 - Exceeds Expectations	
5.0 - Extraordinary	

Cancel

Save and Close

Save and Send to 2nd Level Evaluator



## SAVING / MOVING FORM IN ROUTE MAP

When you update or add information, click “Save and Close,” so you can continue to work on the form.



After the form is complete, “Save and Send to 2<sup>nd</sup> Level Evaluator.” However, once you send the form to the 2<sup>nd</sup> Level Evaluator, you cannot edit the form unless the 2<sup>nd</sup> Level Evaluator sends it back to you.

Once the 2<sup>nd</sup> Level Evaluator approves the evaluation, the form cannot be edited.

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

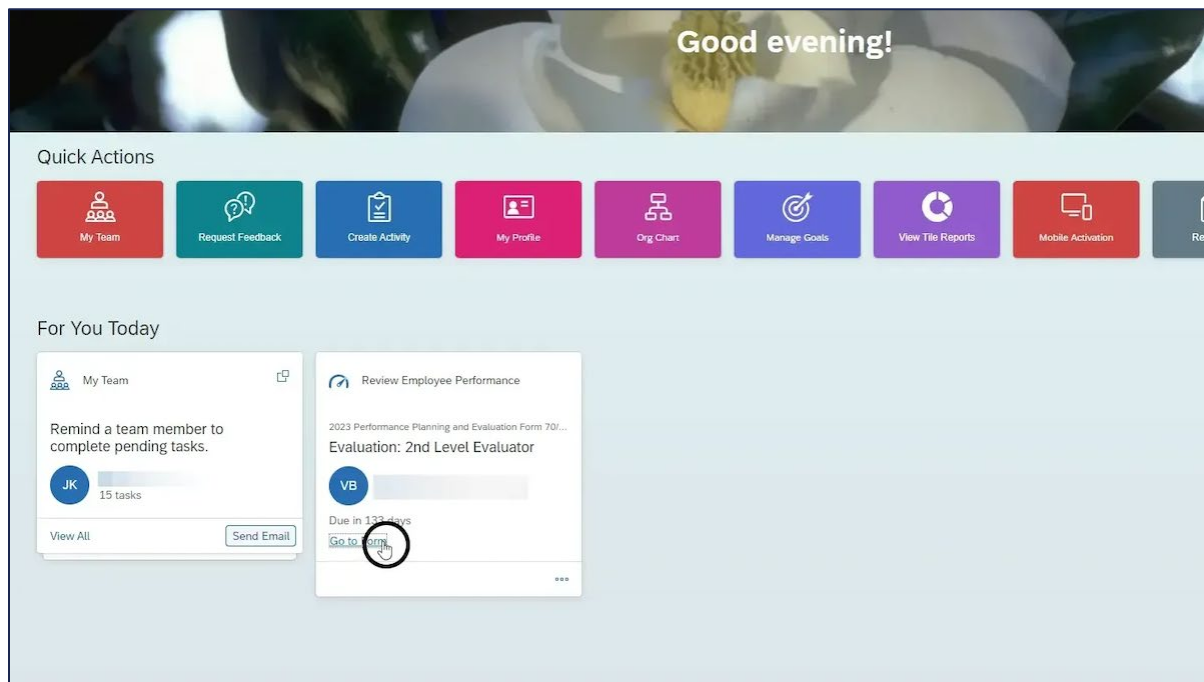
The 2nd Level Evaluator has two important responsibilities in the performance evaluation process:

1. The 2nd Level Evaluator will ensure that your rating is appropriate for your employee's performance and that you have supporting documentation for your rating.
2. The 2nd Level Evaluator will also check to see if your rating is consistent with others who have similar performance, position descriptions, and job duties.

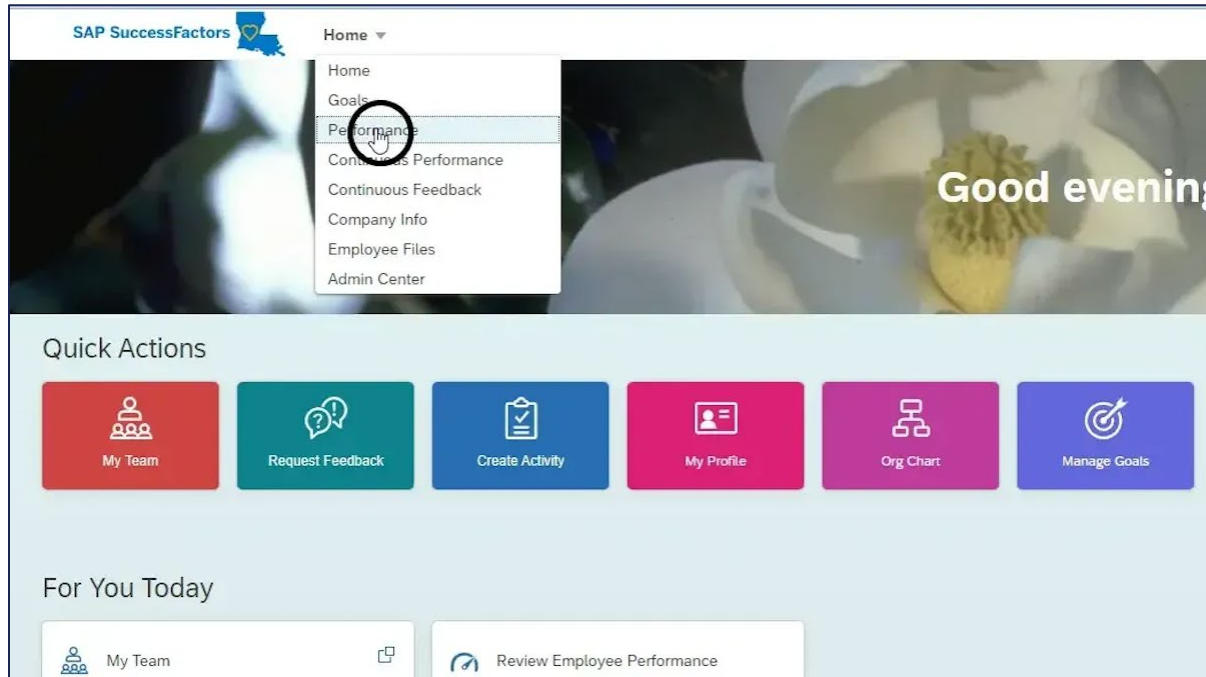


## 2<sup>ND</sup> LEVEL EVALUATOR - NAVIGATING TO THE EVALUATION FORM

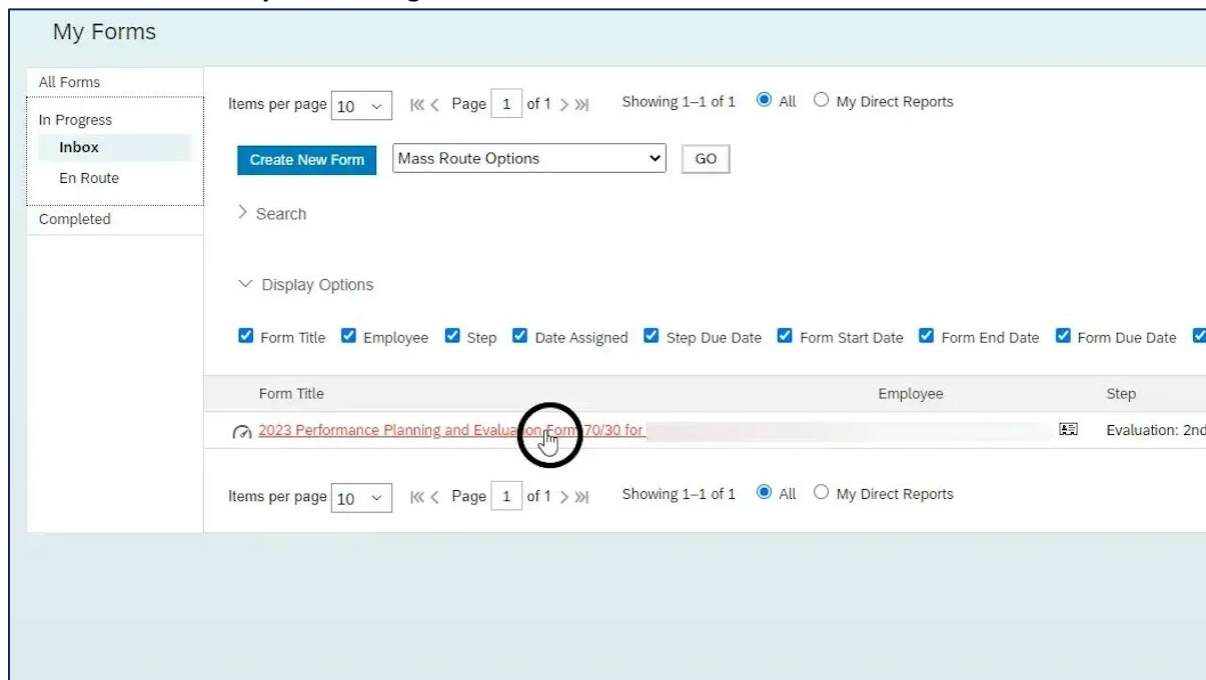
1. **Navigation Option 1: Click on the "Go to Form" link in "For You Today" tile. This takes you directly to the form.**



## 2. Navigation Option 2: Click the "Performance" in the Home menu.



## 3. Click the form in your "In Progress - Inbox."



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

1. After you open the form, you should see 0 Incomplete Items. Click on the Ranking box to see how this employee compares against other subordinates.

NOTE: Only subordinates with completed evaluation will appear in the ranking.

2. Click the print icon to review the form in its entirety.

NOTE: Opening the document in the print view allows you to see supervisor and employee ratings and comments next to each other in an easy-to-read format.



### 3. Click the "Gap Analysis" box to view gaps in the evaluation.

NOTE: The "Gap Analysis" indicates when the employee ratings are higher or lower than the supervisor ratings. Also, the employee is not required to do a self-assessment, so you may not see employee ratings, comments, or a gap analysis.



5 items rated higher than		2 items rated lower than	
Goals (3)	Gap	Goals (1)	Gap
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023	+1.0	Create 3 eLearning courses	-1.0
Facilitation training sessions for PMGM	N/A	Competencies (1)	Gap
Complete all required annual mandatory trainings	+2.0	Demonstrating Innovation	-1.0
Competencies (2)	Gap		
Developing Plans	+1.0		
Leveraging Technology	+1.0		

First Name: [Redacted]  
 Job Code: 00170860  
 Org Unit Description: SCS-TALENT DEVELOPMENT

### 4. Scroll to the Goals section of the form OR click "Goals" to advance to that section.

Performance Planning and Evaluation Form 70/30 for [Redacted]

✓ 0 Incomplete Items # 3 Out of 10

ap Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement **Goals** Competencies Sum

Map

Assessment

Initial Planning: Supervisor ① — ② Initial Planning Session: 2nd Level Evaluator ③ — ④ Planning Discussion ⑤ — ⑥ Self-Assessment ⑦ — ⑧

uction

me to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with  
 ld and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance  
 ors, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil S

ee Information

me [Redacted] First Name [Redacted]  
 e HUMAN RESOURCES CONSULTANT C Job Code 001

5. Review each goal. Click on "Goal Details" to view all goal fields and comments.

Goals (70.0%)

Performance

Create 3 eLearning courses

# courses functional in LMS

Achievements

Goal Details

Other Details

Goal Name*	Create 3 eLearning courses	How will it be measured
Start Date	01/01/2022	Due Date
% Complete	100.0%	Type
Comments	1. 10/14/2022 These classes are part of the new onboarding program. You will collaborate with C. Smith in HR will be the subject matter expert for this project.	Status

Performance

6. Click "Other Details" to view Target information.

Performance

Create 3 eLearning courses

# courses functional in LMS

Achievements

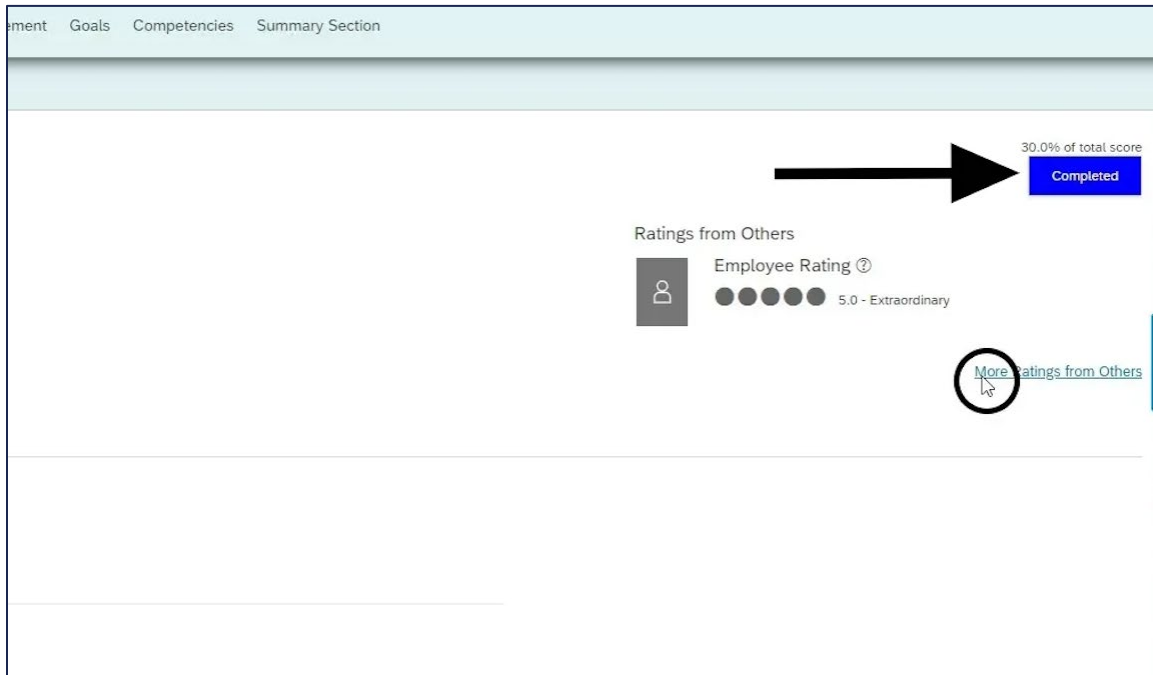
Goal Details

Other Details

Target:

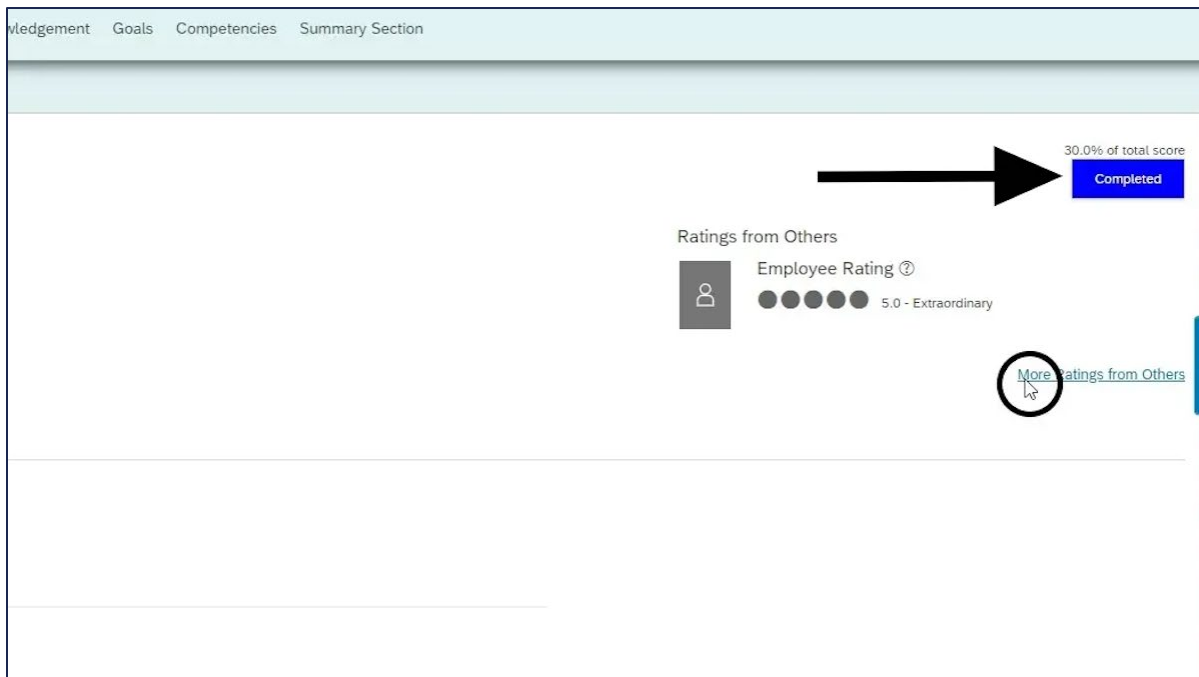
	Course 1
Target Date	02/01/2023
Actual	1
	Course 2
Target Date	04/07/2023
Actual	2
	Course 3
Target Date	08/01/2023

7. View the Goal Status and the % Complete. Then, click on the "More Ratings from Others" to see the Supervisor's Rating and Comments for this goal.



The screenshot shows the SAP SuccessFactors Goals page. At the top, there is a navigation bar with tabs: "ment", "Goals", "Competencies", and "Summary Section". Below the navigation bar, the main content area displays the goal status and ratings. On the right side, there is a blue button labeled "Completed" with a black arrow pointing to it. Above the button, it says "30.0% of total score". Below the button, there is a section titled "Ratings from Others". Under this section, there is a sub-section titled "Employee Rating" with a question mark icon. To the left of the rating is a person icon. The rating itself is represented by five filled circles, followed by the text "5.0 - Extraordinary". Below the rating, there is a link labeled "More Ratings from Others" which is circled in black. A yellow circle with a black exclamation mark is positioned to the right of the screenshot.

8. Use the same steps to review all goals on the form.



This screenshot is identical to the one above, showing the SAP SuccessFactors Goals page. It displays the goal status, the "Completed" button, the "30.0% of total score" indicator, the "Ratings from Others" section, the "Employee Rating" of 5.0 - Extraordinary, and the circled "More Ratings from Others" link. A yellow circle with a black exclamation mark is also present to the right of the screenshot.

## 9. Scroll down to read the "Employee's Comments."

edgement Goals Competencies Summary Section

Ratings from Others

Employee Rating ?

5.0 - Extraordinary

More Ratings from Others

Support

Employee's Comments

I created 6 elearning classes, which is double the goal. I also attended 10 workshops, including a 3 day AR intensive.

Competency Model

## 10. Scroll to the Competencies section of the form OR click "Competencies" to advance to that section.

Planning and Evaluation Form 70/30 for

✓ 0 Incomplete Items # 3 Out of 10

Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals **Competencies** Summary Section

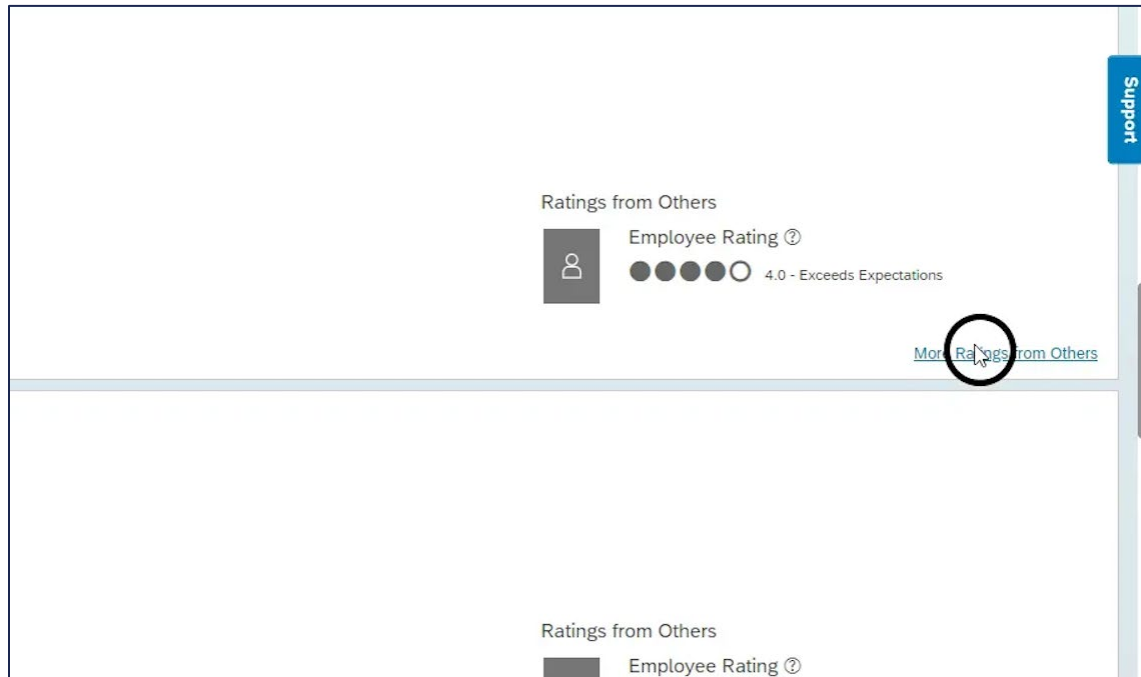
Assessment

Supervisor ① — 2 Initial Planning Session: 2nd Level Evaluator ① — 3 Planning Discussion ① — 4 Self-Assessment ① — 5 Evaluation: Supervisor

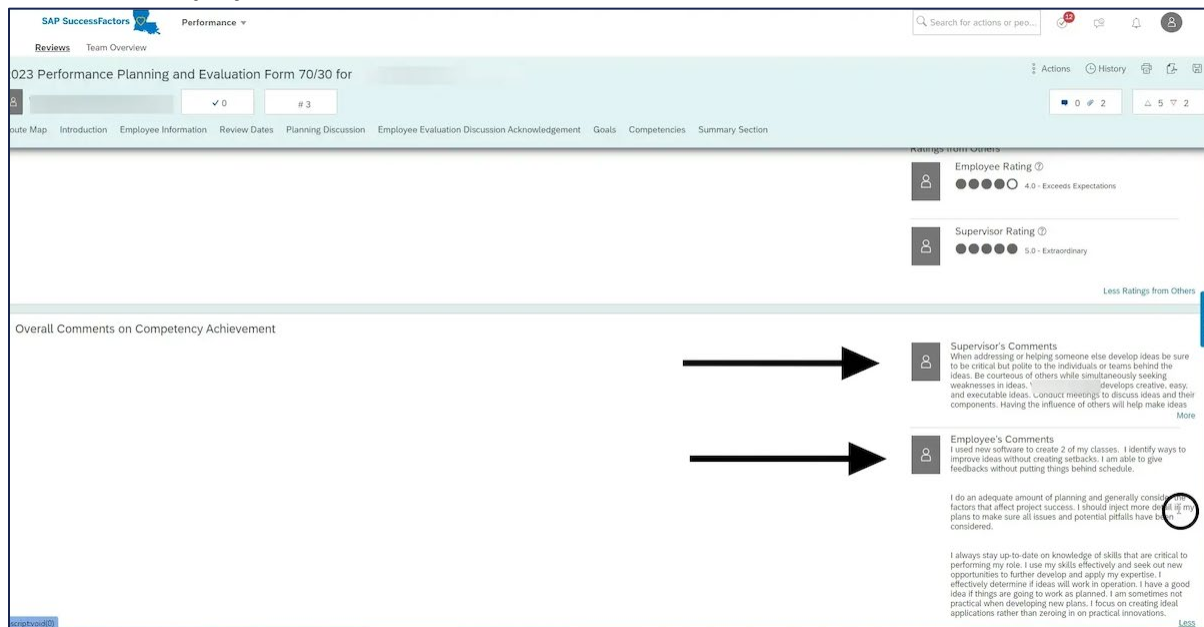
Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance plan to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating

HUMAN RESOURCES CONSULTANT C First Name Job Code 00170860

11. You can easily view the employee rating of each competency. However, you **MUST** click on "More Ratings from Others" to see how the supervisor rated the employee's competency.



12. Review the "Overall Comments on Competency Achievement" from both the supervisor and the employee.



### 13. In the Summary section, you can view the scores for each goal and competency.

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Goals Competencies Summary Section

**Summary Section**

Overall Form Rating: ⑦  
●●●●○ Exceeds Expectations

Calculated Form Rating:  
4.14/5.0

Name	Rating	Weight
<b>Goals</b>	4.2	70.0% of total score
Create 3 eLearning courses	4.0 - Exceeds Expectations	30.0%
Conduct 5 training sessions with other coworkers on new design skills by 10/1/2023	4.0 - Exceeds Expectations	30.0%
Facilitation training sessions for PMGM	3.0 - Successful	10.0%
Complete all required annual mandatory trainings	5.0 - Extraordinary	15.0%
Attend 5 seminars, conferences and/or trainings during the performance year to keep professional skills up to date	5.0 - Extraordinary	15.0%
<b>Competencies</b>	4.0	30.0% of total score
Demonstrating Innovation	3.0 - Successful	
Developing Plans	4.0 - Exceeds Expectations	
Leveraging Technology	5.0 - Extraordinary	

Overall Comments on Performance

Supervisor's Comments Overall...

### 14. You can also view the "Calculated Form Rating."

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



Calculated Form Rating:  
4.14/5.0

Rating	Weight
4.2	70.0% of total score
4.0 - Exceeds Expectations	30.0%
4.0 - Exceeds Expectations	30.0%
3.0 - Successful	10.0%
5.0 - Extraordinary	15.0%
5.0 - Extraordinary	15.0%
4.0	30.0% of total score

**15. If you do not approve the evaluation, click "Save and Send Back to Supervisor." To approve the evaluation, click "Save and Send to Evaluation Acknowledgement."**

NOTE: You will have to contact the supervisor to explain why you returned the form. The system does not allow you to revise, comment, or include an explanation.

4.0 30.0% of total score

3.0 - Successful

4.0 - Exceeds Expectations

5.0 - Extraordinary

Supervisor's Comments Overall...

Cancel Save and Close Save and Send Back to 2nd Level Evaluator Save and Send to Evaluation Acknowledgement



**16. After you click "Save and Send to Evaluation Acknowledgment," click again to confirm your selection.**

Support

Cancel & Return to Form Save and Send to Evaluation Acknowledgement

---

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

Your 2<sup>nd</sup> Level Evaluator may want to meet with you to discuss the ratings given to your employees. Since this system does not allow 2<sup>nd</sup> Level Evaluators to comment on performance forms, if a form is not approved, you may need to meet with your 2<sup>nd</sup> Level Evaluator.

Here are some guidelines to help you prepare for the meeting:

- Follow your agency policies. Some agencies may require you to submit your CPM forms and documentation to your 2nd Level Evaluator before your meeting. Other agencies will ask you to bring the forms and documentation with you to your meeting. Check with your supervisor or HR Office if you are unsure of your agency policies.
  - Prepare materials. Make sure you bring with you the completed CPM form, the position description, and any supporting documentation to the meeting with your 2nd Level Evaluator.
  - Summarize your rating. Be ready to give a short summary of your rating decision including the actual rating and why you chose it. Your 2nd Level Evaluator most likely must meet with several supervisors about CPM ratings and will appreciate your preparedness.
  - Be ready to answer questions. Your 2nd Level Evaluator may ask about other employees with the same or similar job duties and how you rated them.
-

## CONDUCTING THE EVALUATION DISCUSSION

Conducting a Performance Evaluation Discussion can be a valuable experience for both you and your employees, regardless of the rating.



While no employee will enjoy receiving a lower rating, the performance evaluation is a chance for employees to understand how their performance was inadequate and learn what they must do to improve. This type of evaluation discussion can be an important opportunity for you to work with your employees and assist them to become successful in their jobs.

For positive ratings, the evaluation discussion is a chance to recognize employees' good performance, which boosts morale and helps the professional growth.

Here are some suggestions to help you conduct the evaluation discussion:



- Schedule your evaluation discussion before you send the form to the 2<sup>nd</sup> Level Evaluator. Remember, your employees received the approved evaluation form at the same time you did. Do not make them wait for the opportunity to discuss the ratings.
- Make sure you hold the evaluation discussion in a private place. This is a confidential meeting with your employees. You should not hold meetings in open offices or other public locations where others may be able to overhear. If you don't have a private office, use an empty meeting room.
- Review the goals and competencies you set with your employees during the planning discussion. This will remind employees of the standards they were expected to meet.
- Discuss the gaps between your ratings and the employees' ratings. Encourage your employees to discuss how and why they assigned the ratings they did. Share with employees your reasons for the ratings and, if applicable, any documentation you have supporting the ratings.
- Review and explain the overall rating for the evaluation period. 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.


If the rating is negative, or even if it is a successful rating, but you still feel there is an area of performance employees need to improve, be sure to set clear expectations on how employees can become successful. You may also want to include an action plan to assist employees with their development.

Finally, regardless of the rating, it is important to find some aspect of employees' work that is positive. Giving employees only negative feedback can demoralize them and make it harder for them to improve.

## DOCUMENTING THE EVALUATION DISCUSSION – SUPERVISOR

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

### 1. Navigate to the employee's performance evaluation form.



SAP SuccessFactors Performance

Reviews Team Overview

2023 Performance Planning and Evaluation Form 70/30 for ANNE-MARIE DAVIS

Incomplete Items 3 Out of 3

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Evaluation Discussion Goals Competencies Summary

Route Map

Assessment

1 Introduction 2 Planning Discussion 3 Self-Assessment 4 Evaluation: Supervisor 5 Evaluation: 2nd Level Evaluator 6 Evaluation: 3rd Level Evaluator 7 Evaluation: 4th Level Evaluator

Introduction

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback to build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating performance evaluation, please refer to the State Civil Service Rules.

Employee Information

Last Name	ANNE-MARIE DAVIS	First Name	ANNE-MARIE
Job Title	HR CONSULTANT SPECIALIST	Job Code	00170870
Personnel Area Description	CS-State Civil Service	Org Unit Description	SCS-TALENT DEVELOPMENT

Review Dates

### 2. Scroll down or click on "Evaluation Discussion" to navigate to that section.

Performance

2023 Performance Planning and Evaluation Form 70/30 for ANNE-MARIE DAVIS

Incomplete Items 3 Out of 3

Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Evaluation Discussion Goals Competencies Summary


Assessment

1 Introduction 2 Planning Discussion 3 Self-Assessment 4 Evaluation: Supervisor 5 Evaluation: 2nd Level Evaluator 6 Evaluation: 3rd Level Evaluator 7 Evaluation: 4th Level Evaluator

Evaluation Discussion

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback to build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning, and employees to track and see the form online via desktop and mobile devices, increasing efficiency and transparency. For more information about the Civil Service rules regulating performance evaluation, please refer to the State Civil Service Rules.

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



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement **Evaluation Discussion**

Evaluation Discussion

\* Date of Evaluation Discussion  
 \* Results of Evaluation Discussion  
 \* Supervisor's Signature

Goals (70.0%)

Performance  
 Conduct a training needs assessment and skills gap analysis by (date)  
 Needs assessment conducted

Supervisor Rating ⓘ  
 ●●●○○ Successful

Supervisor's Comments  
 Where can I see the comments?


Achievements Goal Details Other Details

There are no Achievements.

MM/DD/YYYY

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
40	25	26	27	28	29	30	1
41	2	3	4	5	6	7	8
42	9	10	11	12	13	14	15
43	16	17	18	19	20	21	22
44	23	24	25	26	27	28	29
45	30	31	1	2	3	4	5

### 4. Select the results of the Evaluation Discussion.



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement **Evaluation Discussion**

Evaluation Discussion

\* Date of Evaluation Discussion  
 \* Results of Evaluation Discussion  
 \* Supervisor's Signature

Goals (70.0%)

Performance  
 Conduct a training needs assessment and skills gap analysis by (date)  
 Needs assessment conducted

Supervisor Rating ⓘ  
 ●●●○○ Successful

Supervisor's Comments  
 Where can I see the comments?

Achievements Goal Details Other Details

There are no Achievements.

10/20/2022

Select one...  
 Select one...  
**Meeting Conducted**  
 Employee Unavailable  
 Employee Refused Evaluation Discussion

5. Click the "Supervisor's Signature" box. Type your name in the box. Click your name to "Sign" the form.

NOTE: After you have typed your name once, it may appear under the signature box. You may click on your name to autofill the field.



Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement **Evaluation Discussion**

### Evaluation Discussion

\* Date of Evaluation Discussion 10/20/2022

\* Results of Evaluation Discussion Meeting Conducted

\* Supervisor's Signature

Goals (70.0%)

Performance

Conduct a training needs assessment and skills gap analysis by (date)

Needs assessment conducted

Supervisor Rating ②

●●●○○ Successful

Supervisor's Comments

Where can I see the comments?

Achievements Goal Details Other Details

There are no Achievements.

6. Scroll to the bottom of the page and click "Acknowledge Evaluation and Send to Employee."

Rating	Weight
4.25	70.0% of total score
3.0 - Successful	25.0%
Select a rating...	20.0%
Select a rating...	25.0%
4.0 - Exceeds Expectations	25.0%
Select a rating...	10.0%
5.0 - Extraordinary	25.0%
5.0 - Extraordinary	25.0%
5.0	30.0% of total score
5.0 - Extraordinary	
5.0 - Extraordinary	
5.0 - Extraordinary	

Cancel Save and Close **Acknowledge Evaluation and Send to Employee**

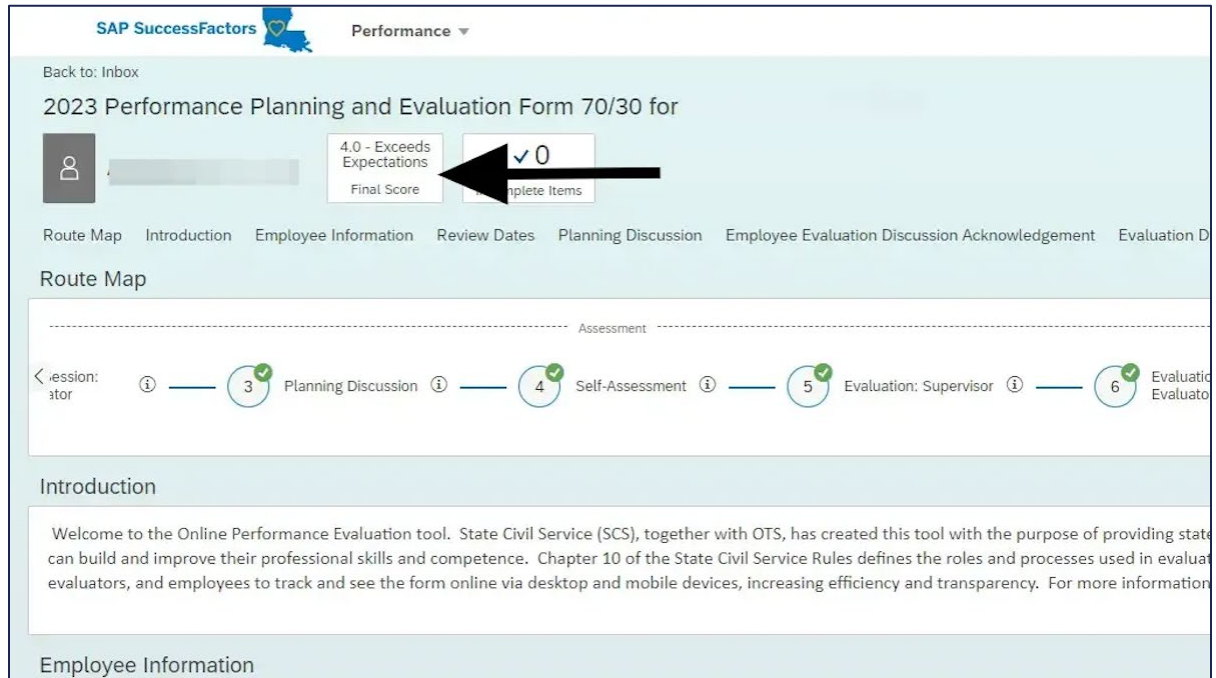
**7. Confirm your selection. You can also "Send and Open Next Form" or "Cancel & Return to Form."**

The screenshot shows the final step of an assessment process. At the top right, there is a "Hide" link. Below it, a progress bar labeled "Assessment" shows four steps: 4 Self-Assessment (completed), 5 Evaluation: Supervisor (completed), 6 Evaluation: 2nd Level Evaluator (completed), and 7 Evaluation: Discussion (current step, marked with a clock icon and a due date of 02/28/2023). Below the progress bar, a message states: "A copy of the form is also sent to your En Route folder." At the bottom, there are three buttons: "Cancel & Return to Form", "Send and Open Next Form", and "Acknowledge Finalization and Send to Employee". The third button is highlighted with a red circle and a mouse cursor. On the right side of the screen, there is a vertical blue button labeled "Support".

## DOCUMENTING THE EVALUATION DISCUSSION – EMPLOYEE SIGNATURE

### 1. Navigate to the form.

NOTE: Final Score is shown in the box at the top.



SAP SuccessFactors Performance

Back to: Inbox

2023 Performance Planning and Evaluation Form 70/30 for

4.0 - Exceeds Expectations  
Final Score

0

Route Map Introduction Employee Information Review Dates Planning Discussion Employee Evaluation Discussion Acknowledgement Evaluation D

Route Map

Assessment

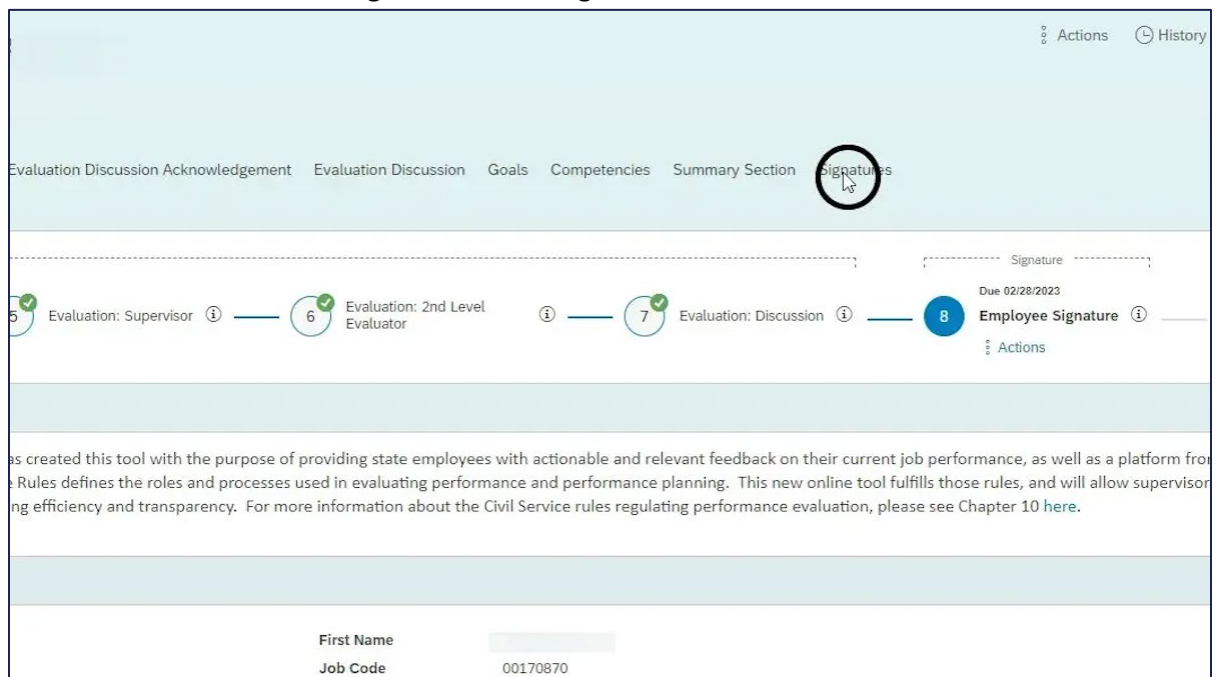
Session: 1 — 3 Planning Discussion — 4 Self-Assessment — 5 Evaluation: Supervisor — 6 Evaluation: Supervisor

Introduction

Welcome to the Online Performance Evaluation tool. State Civil Service (SCS), together with OTS, has created this tool with the purpose of providing state employees with actionable and relevant feedback on their current job performance, as well as a platform from which they can build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning. This new online tool fulfills those rules, and will allow supervisors and employees to track and see the form 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.

Employee Information

### 2. Scroll down or click on "Signatures" to navigate to that section.



Actions History

Evaluation Discussion Acknowledgement Evaluation Discussion Goals Competencies Summary Section Signatures

Signature

Due 02/28/2023

5 Evaluation: Supervisor — 6 Evaluation: 2nd Level Evaluator — 7 Evaluation: Discussion — 8 Employee Signature

Actions

as created this tool with the purpose of providing state employees with actionable and relevant feedback on their current job performance, as well as a platform from which they can build and improve their professional skills and competence. Chapter 10 of the State Civil Service Rules defines the roles and processes used in evaluating performance and performance planning. This new online tool fulfills those rules, and will allow supervisors and employees to track and see the form 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.

First Name

Job Code 00170870

**3. Type your comments in the "Employee's Comments" box.**

NOTE: This is optional.

## Signatures

By signing this form, I am certifying that I received my evaluation and understand that my failure to sign will not prohibit the evaluator from completing the evaluation.

Employee: ANNE-MARIE DAVIS has not signed yet

Employee's Comments

**B** *I* U | | S | A-Z

Employee types comments here.

I

**4. Click "Sign" to sign the form.**

NOTE: You cannot type your name in the box.

7 Evaluation: Discussion ① — 8 Employee Signature ① — 9 Completion

Cancel & Return to Form Sign and Open Next Form Sign

Support

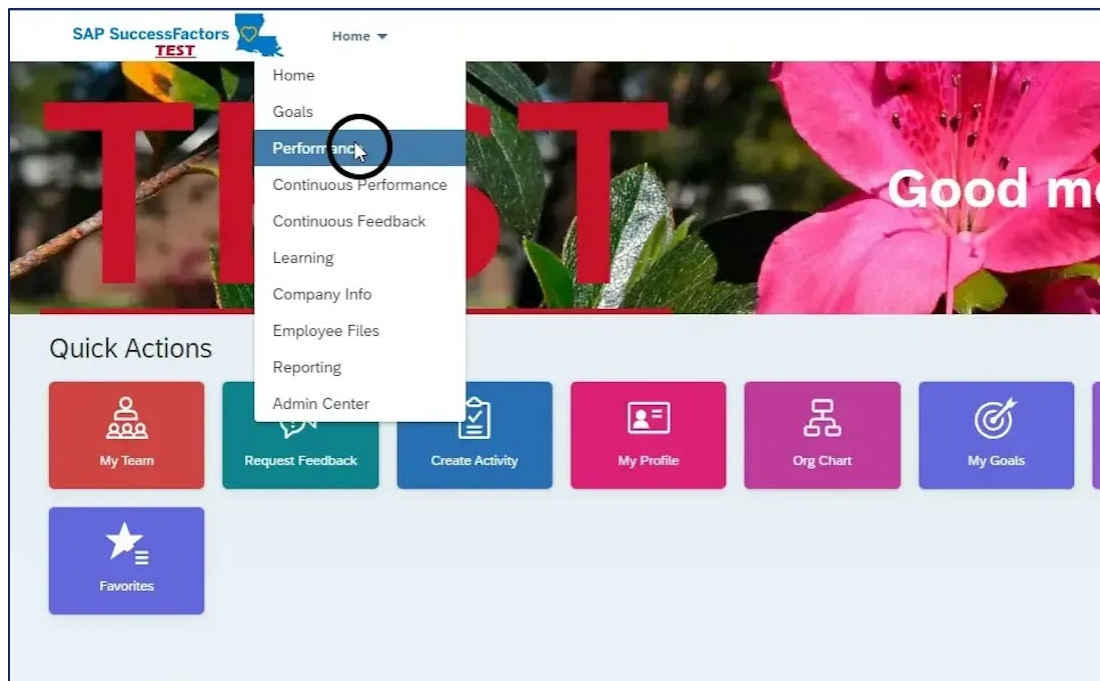


**5. Confirm your selection. The CPM form is now complete.**

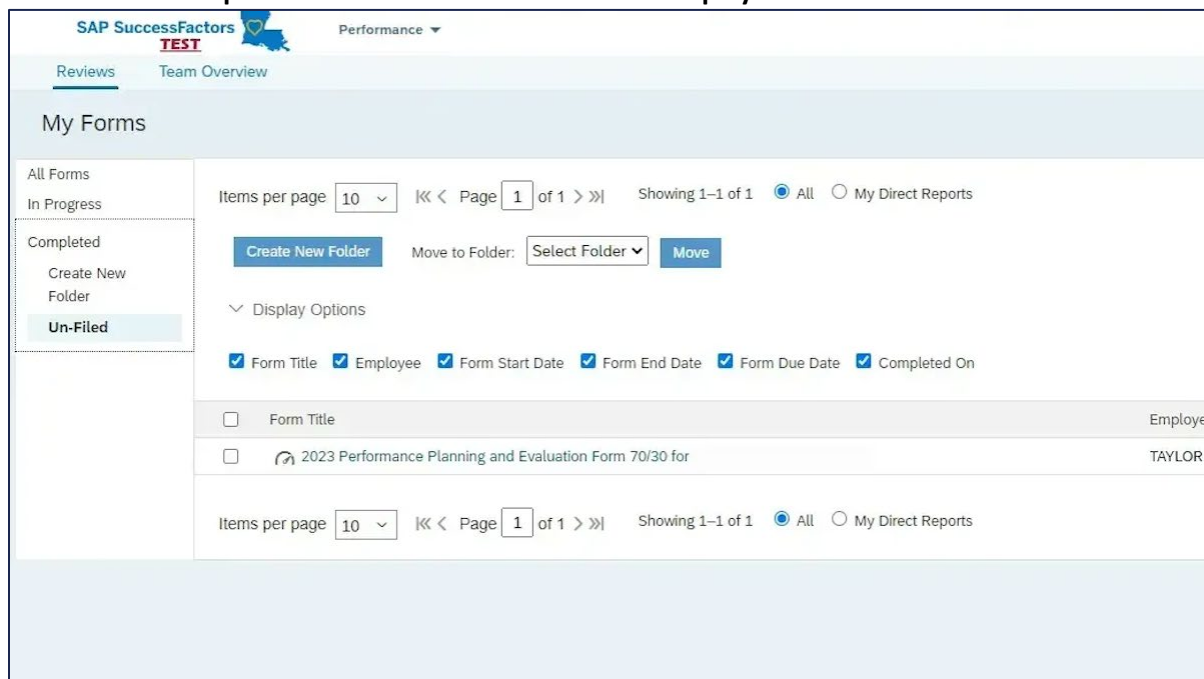
The screenshot displays the final steps of the CPM (Career Progression Management) form. At the top, a progress bar shows four steps: 6. Evaluation: 2nd Level Evaluator (completed), 7. Evaluation: Discussion (completed), 8. Employee Signature (current step), and 9. Completion. A due date of 02/28/2023 is indicated. The main area is a large, empty light blue box for the employee signature. In the bottom right corner, there is a 'Cancel & Return to Form' button and a 'Sign' button with a hand icon, which is circled in red. A vertical 'Support' button is also visible on the right edge.

## HOW TO FIND AND ORGANIZE COMPLETED FORMS

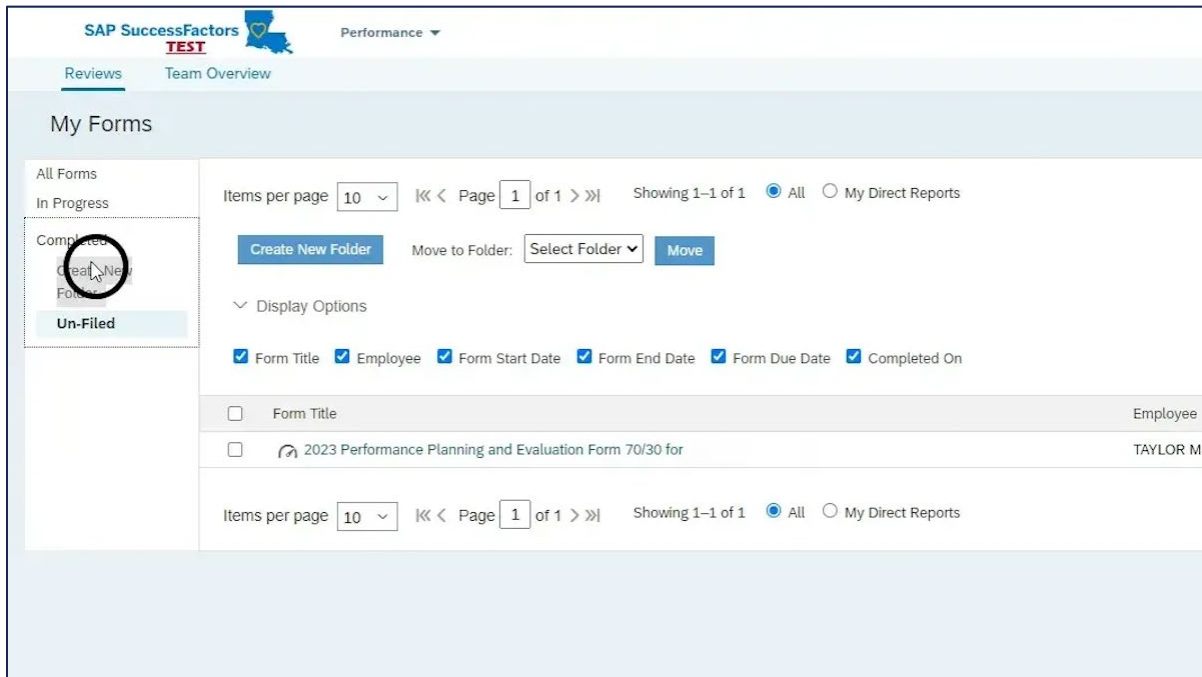
### 1. Click the "Performance" in the Home menu.



### 2. Click on "Completed." All "Un-Filed" forms will be displayed.



### 3. You can organize your forms by creating folders and moving forms. Click "Create New Folder."



SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

### My Forms

All Forms  
In Progress  
Completed  
Un-Filed

Items per page 10 ▾ |<< < Page 1 of 1 > >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Select Folder ▾ Move

Display Options

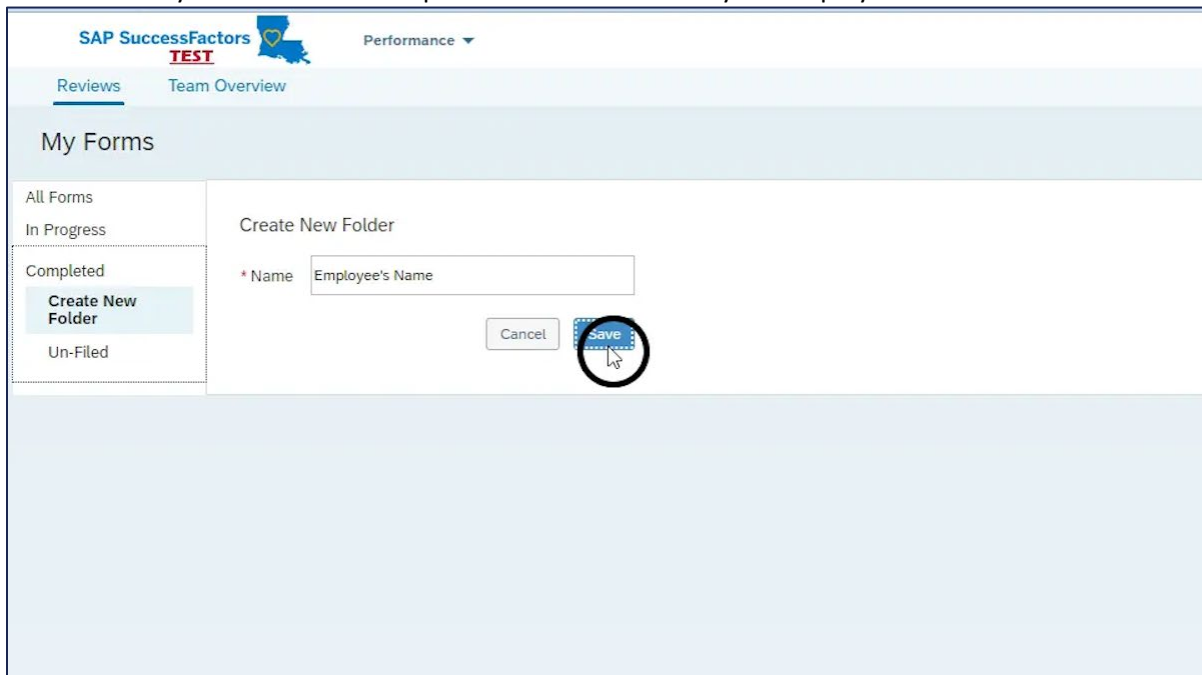
☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee
<input type="checkbox"/> 2023 Performance Planning and Evaluation Form 70/30 for	TAYLOR M

Items per page 10 ▾ |<< < Page 1 of 1 > >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

#### 4. Type in the name of the folder.

NOTE: You may want to create a separate folder for each of your employees.



SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

### My Forms

All Forms  
In Progress  
Completed  
Un-Filed

Create New Folder

\* Name Employee's Name

Cancel Save

5. Click on "Un-Filed" to see all forms that have not been organized.

The screenshot shows the SAP SuccessFactors interface. At the top, there's a header with 'SAP SuccessFactors TEST' and a 'Performance' dropdown. Below the header, there are tabs for 'Reviews' and 'Team Overview'. The main section is titled 'My Forms'. On the left, there's a sidebar with a tree view containing 'All Forms', 'In Progress', 'Completed', 'Create New Folder', 'Un-Filed', and 'Employee's Name'. The 'Un-Filed' folder is highlighted with a black circle and a mouse cursor. The main content area shows a table with columns: 'Form Title', 'Employee', 'Form Start Date', and 'Form End Date'. The table is currently empty, and the pagination shows 'Page 0 of 0'. There are also filters for 'Form Title', 'Employee', 'Form Start Date', 'Form End Date', 'Form Due Date', and 'Completed On'.

6. To move a file into a folder, select the file.

The screenshot shows the same SAP SuccessFactors interface as before. The 'Un-Filed' folder is still selected in the sidebar. The main content area now shows a table with one row. The first row has a checkbox selected (indicated by a blue checkmark and a mouse cursor) and the text '2023 Performance Planning and Evaluation Form 70/30 for'. The employee name 'TAYLOR M B' is visible in the 'Employee' column. The pagination shows 'Page 1 of 1'. There are also filters for 'Form Title', 'Employee', 'Form Start Date', 'Form End Date', 'Form Due Date', and 'Completed On'.

## 7. Click the "Move to Folder:" drop-down menu.

The screenshot shows the SAP SuccessFactors Performance interface. The left sidebar has tabs for 'All Forms', 'In Progress', 'Completed', 'Create New Folder', 'Un-Filed', and 'Employee's Name'. The main area is titled 'My Forms' and contains a table of forms. A dropdown menu is open next to the 'Move to Folder:' button, showing options: 'Select Folder', 'Un-Filed', and 'Employee's Name'. A mouse cursor is pointing at the 'Move to Folder:' button.

Performance ▾

Reviews Team Overview

My Forms

All Forms  
In Progress  
Completed  
Create New Folder  
Un-Filed  
Employee's Name

Items per page 10 ▾ |<< Page 1 of 1 >>| Showing 1–1 of 1 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Select Folder Select Folder Un-Filed Employee's Name Move

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee
<input checked="" type="checkbox"/> 2023 Performance Planning and Evaluation Form 70/30 for	TAYLOR M

Items per page 10 ▾ |<< Page 1 of 1 >>| Showing 1–1 of 1 ☒ All ☐ My Direct Reports

## 8. Select the correct folder.

The screenshot shows the same SAP SuccessFactors Performance interface as before. The dropdown menu is still open, and the 'Employee's Name' option is now highlighted with a mouse cursor.

Performance ▾

Reviews Team Overview

My Forms

All Forms  
In Progress  
Completed  
Create New Folder  
Un-Filed  
Employee's Name

Items per page 10 ▾ |<< Page 1 of 1 >>| Showing 1–1 of 1 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Select Folder Select Folder Un-Filed Employee's Name Move

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee
<input checked="" type="checkbox"/> 2023 Performance Planning and Evaluation Form 70/30 for	TAYLOR M BU

Items per page 10 ▾ |<< Page 1 of 1 >>| Showing 1–1 of 1 ☒ All ☐ My Direct Reports

9. Click "Move" to add file to selected folder.

SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

### My Forms

All Forms  
In Progress  
Completed  
Create New Folder  
**Un-Filed**  
Employee's Name

Items per page 10 ▾ |<< < Page 1 of 1 > >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Employee's Name ▾ **Move**

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee
<input checked="" type="checkbox"/> 2023 Performance Planning and Evaluation Form 70/30 for	TAYLOR M BUTT

Items per page 10 ▾ |<< < Page 1 of 1 > >> Showing 1–1 of 1 ☒ All ☐ My Direct Reports

10. Click on any folder to view its contents.

SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

### My Forms

All Forms  
In Progress  
Completed  
Create New Folder  
**Un-Filed**  
Employee's Name

Items per page 10 ▾ |<< < Page 0 of 0 > >> Showing 0–0 of 0 ☒ All ☐ My Direct Reports

Create New Folder Move to Folder: Select Folder ▾ **Move**

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

<input type="checkbox"/> Form Title	Employee	Form Start Date	Form End Date
-------------------------------------	----------	-----------------	---------------

Items per page 10 ▾ |<< < Page 0 of 0 > >> Showing 0–0 of 0 ☒ All ☐ My Direct Reports

## CONTINUOUS PERFORMANCE MANAGEMENT

*Continuous Performance Management is a solution that enables quick feedback on work through frequent and structured conversations between employee and manager. A manager can track team members' progress and offers a simple way to provide coaching advice. – SF Guide*



**WHAT:** This system includes multiple tools to allow you to engage in and document performance discussions with your employees. These tools are available under “Continuous Performance” and “Continuous Feedback.”

**WHEN:** Throughout the performance year, you should be documenting your employee’s performance. Whether you counsel, praise, or discipline an employee, you need to make sure that you not only take action based on objective facts, but you have documented that action.

**WHY:** The whole goal of performance discussions is to help the employee interpret feedback in a manner that does not make the employee defensive but allows the employee to see it as an opportunity for improvement.

[Click here to review “Documentation Best Practices” in the Appendix.](#)

---

## CONTINUOUS PERFORMANCE TOOLS

In the Continuous Performance section, you will find multiple tools to help you discuss and document your performance discussions. These tools include Activities, Meetings, and Achievements, which are discussed in detail in the next section of this manual.

If your employee is having performance problems, you may want to consider using the Performance Improvement Tool. The purpose of this form is to establish communication and document areas that require further performance development to reach expectations or achieve stated goals in the performance plan. This form may also reflect an agreement between supervisor and employee on the plan for development and may also be used as supporting documentation to the overall performance evaluation to show the steps taken to enhance performance.

Keep in mind that while performance discussions are critical to improving poor performance, they also serve two other purposes:

1. **Filling competency gaps.** Employees may not have mastered competencies that are critical for their current job, or current agency needs. The continuous performance tools offer employees and supervisors many ways to document learning and growth. Things like attending conferences and webinars, working on projects, reading business literature, and others can be the springboard an employee needs to build competence.
2. **Encouraging employee growth and development.** Succession planning means that agencies understand the kinds of skills and competencies they need to be actively developing to fill future roles. Employees may also have future roles in mind that they want to prepare for. The Continuous Performance Tools provided will aid both supervisors and employees in developing highly skilled and competent employees who can take on a variety of fulfilling roles in state government.

## USING ACTIVITIES

**WHAT:** Activities help you and your employee plan and track activities in real time. Activities can be used as a planning tool to help capture the completion of milestones and/or goals.

**WHEN:** Use this tool when you have tasks that you want to track and/or link to your employee's goals.

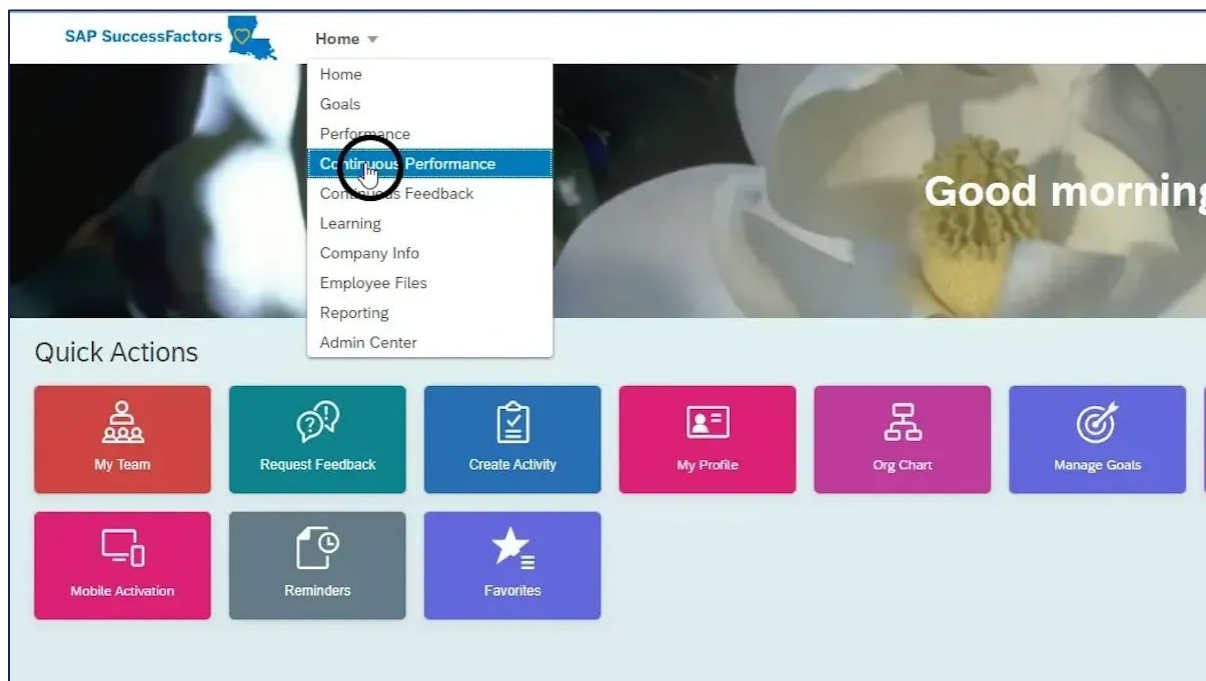
**WHY:** Activities help you have a better understanding of what your employees are doing. You can also use this tool to facilitate discussions that may positively impact your employee's engagement and performance.

**SF NOTES:** *Activities can be linked or independent of goals. Activities do not appear in Goal Plans or on performance management forms, but they can be used to create documented achievements easily.*

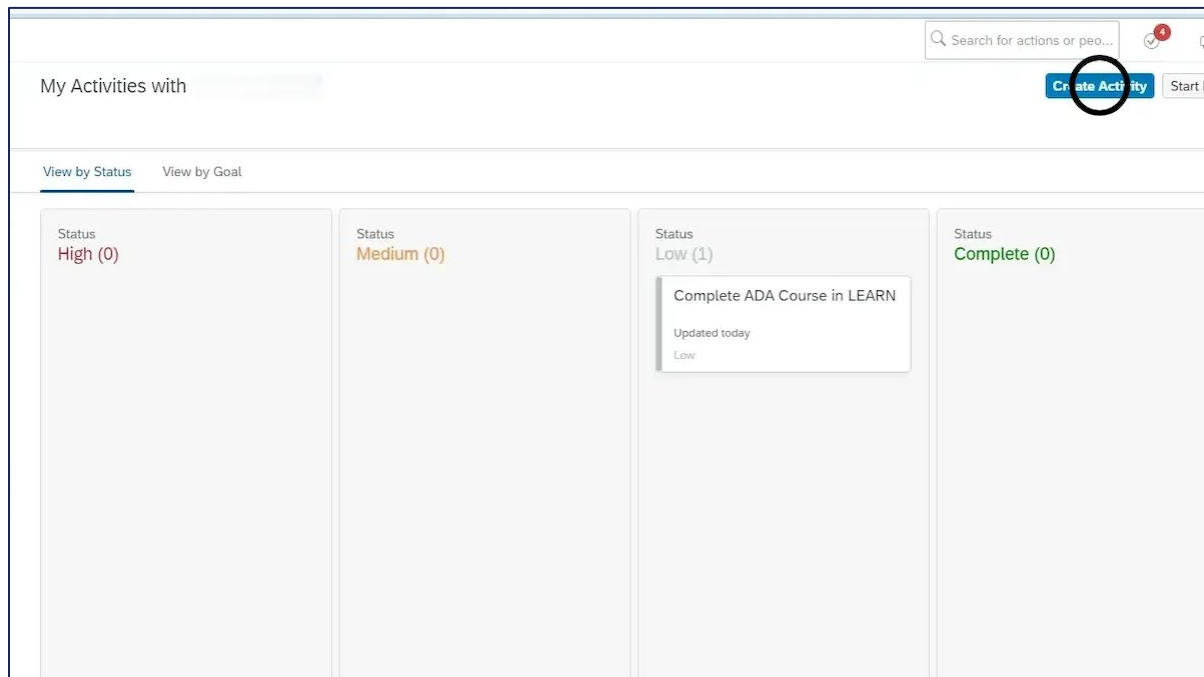


## HOW TO CREATE ACTIVITIES FROM CONTINUOUS PERFORMANCE

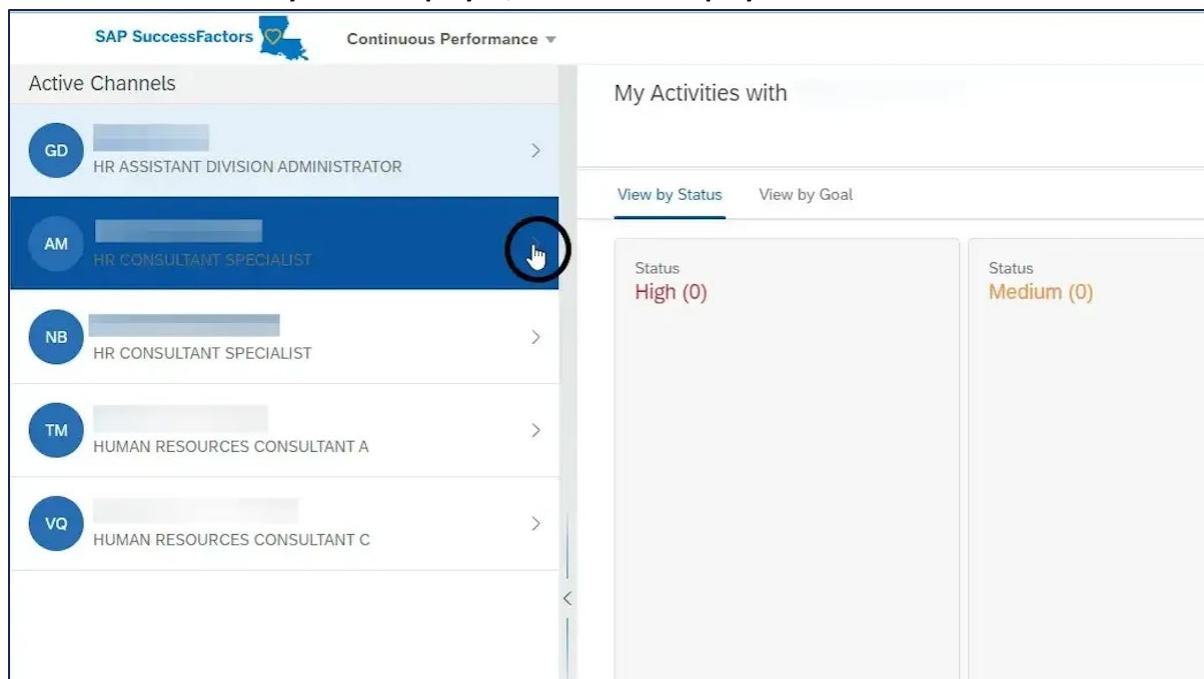
### 1. Select "Continuous Performance" from the Home menu.



2. To create an activity for yourself, from the "My Activities with <Supervisor>" screen, click the "Create Activity" button.



3. To create an activity for an employee, click on the employee's name.



4. This is their "Activities" page. To add an activity, click the "Create Activity" button.

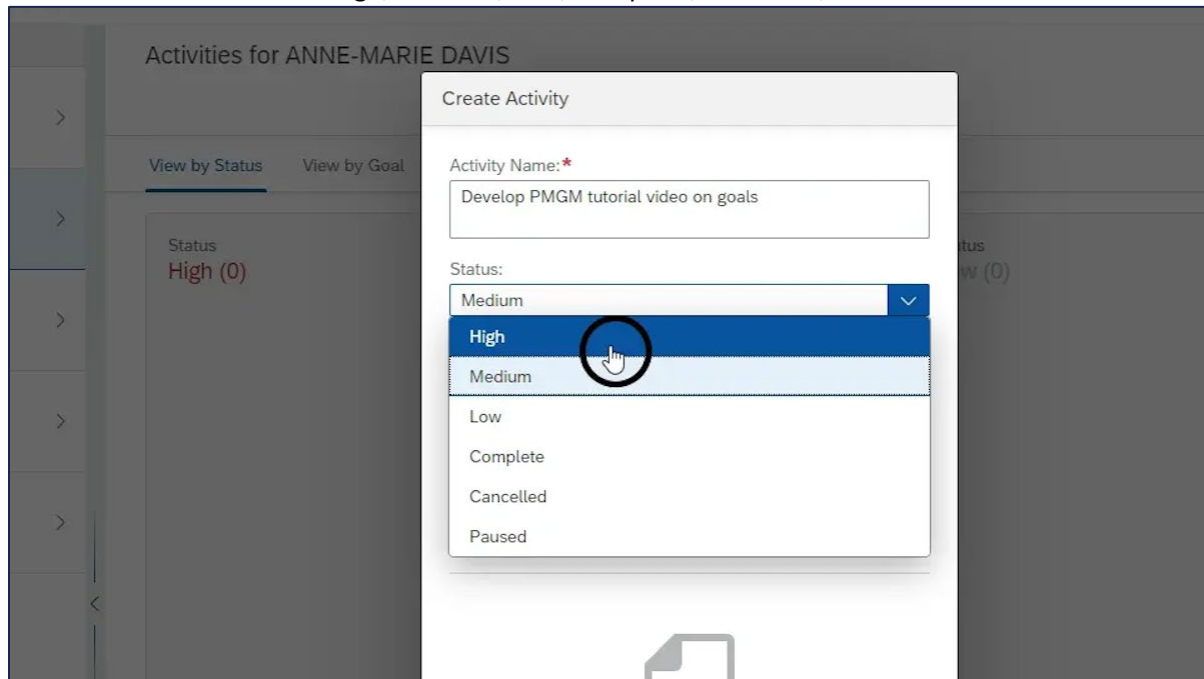
5. Type the Activity Name in the field.

NOTE: This is the only field required to create an activity.

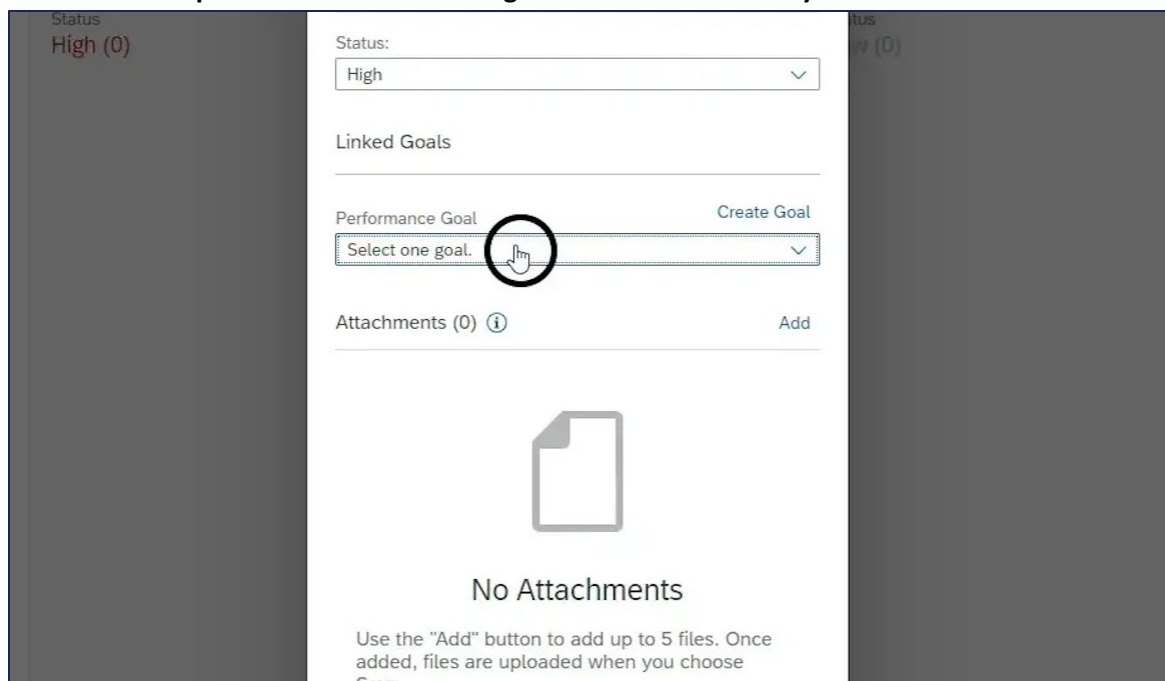


## 6. Select the Status of the activity.

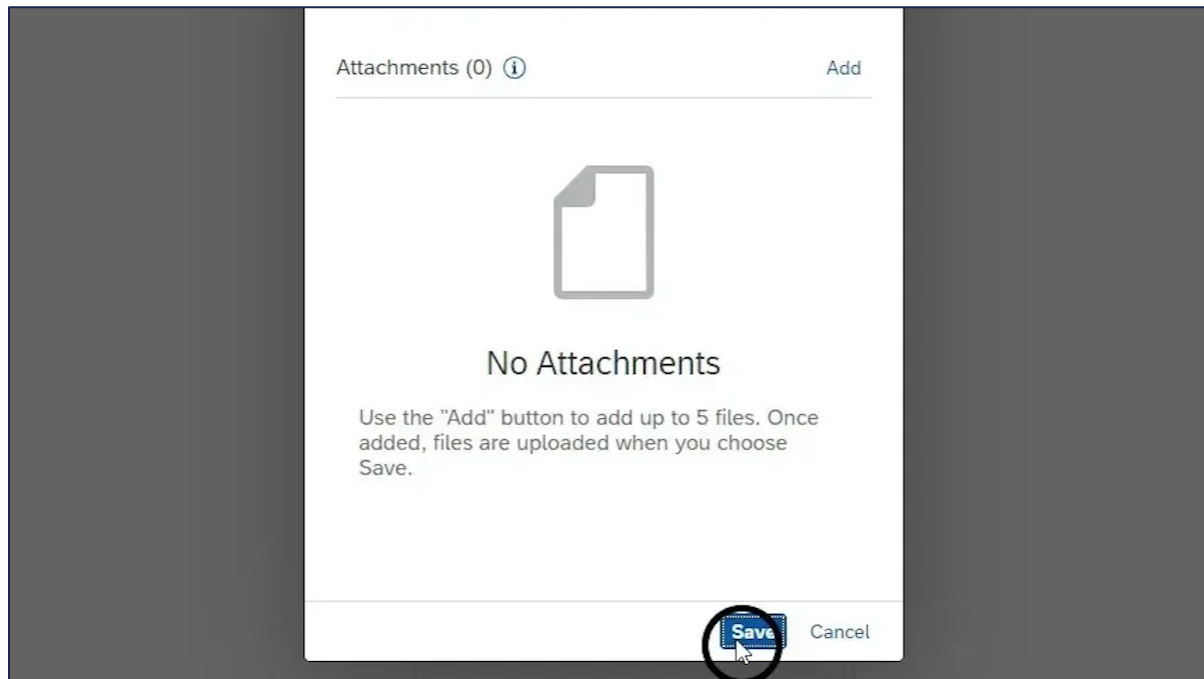
NOTE: You can select from High, Medium, Low, Complete, Cancelled, and Paused. The default is Medium.



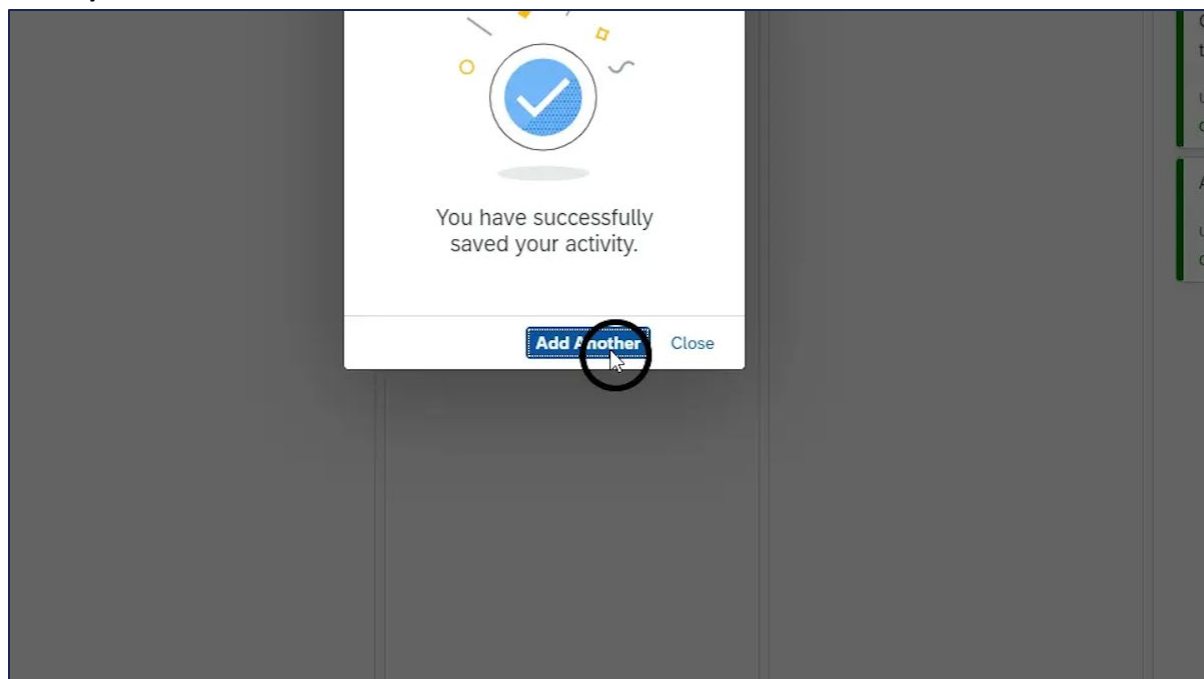
## 7. Use the drop-down menu to select a goal to link to the activity.



8. Click "Save" to save activity.

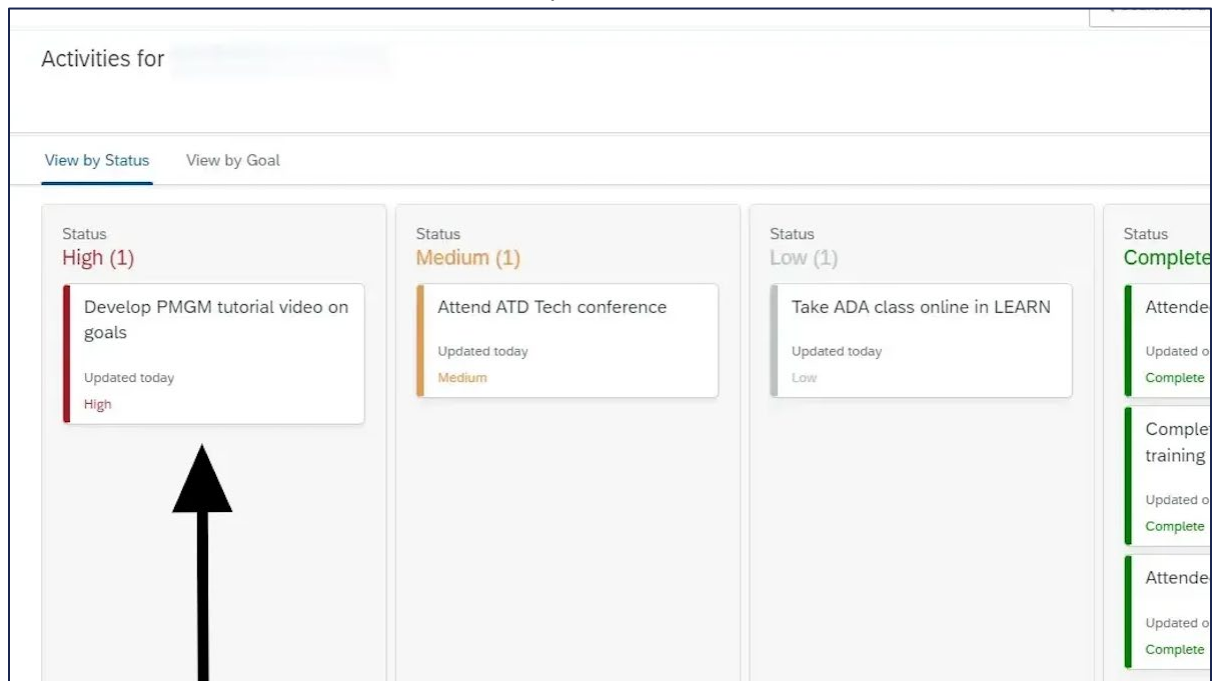
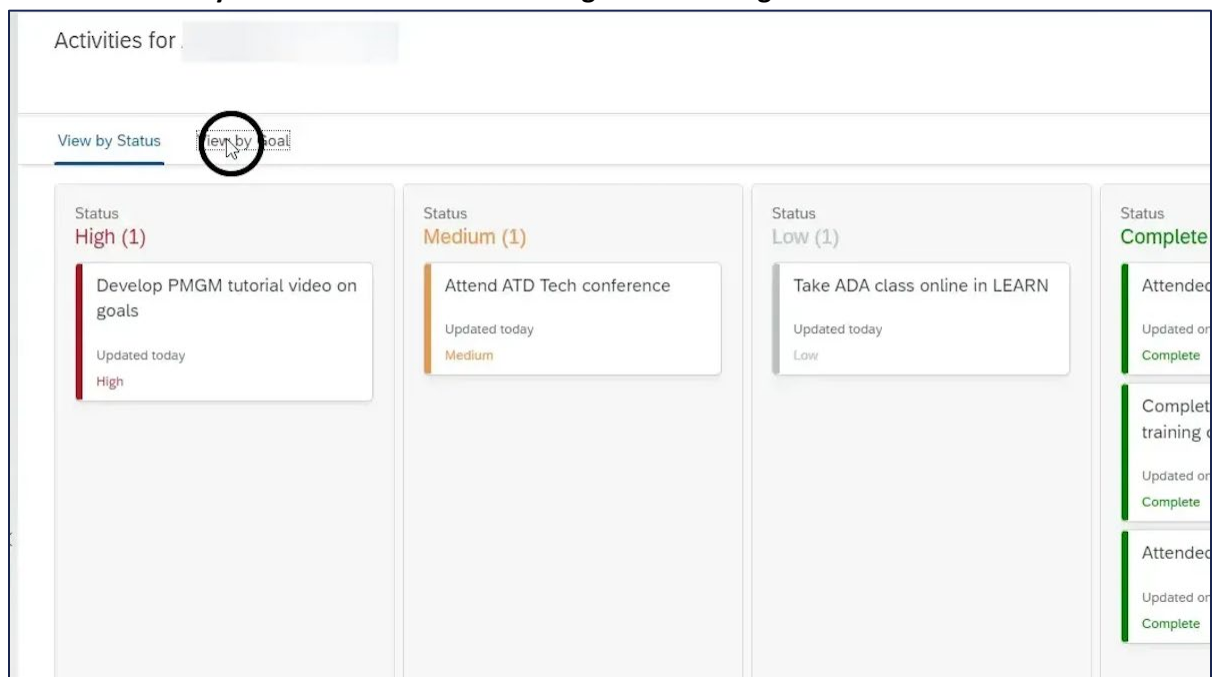


9. After you create an activity, you have the choice to "Add Another" activity for this employee or you can "Close."



**10. The activity now appears on the employee's "Activities" page.**

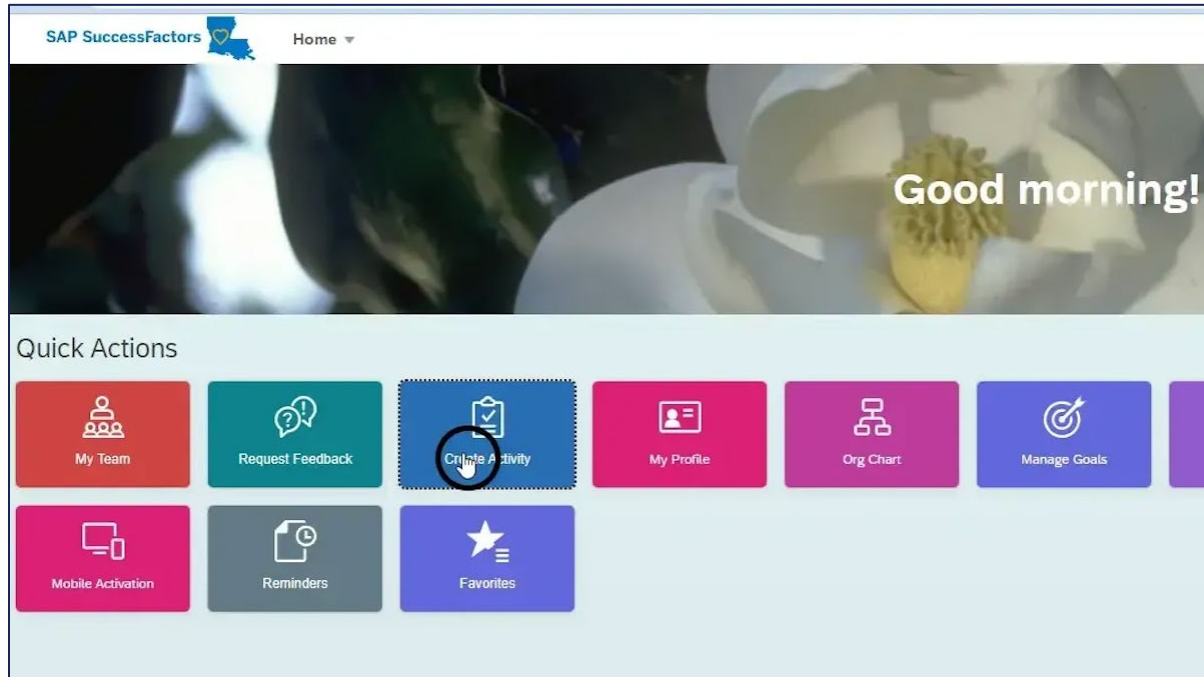
NOTE: The default view shows the activities by their Status.

**11. Click "View by Goal" to see the activities aligned with the goals.**

## HOW TO CREATE AN ACTIVITY FOR YOURSELF FROM THE QUICK ACTIONS TILE

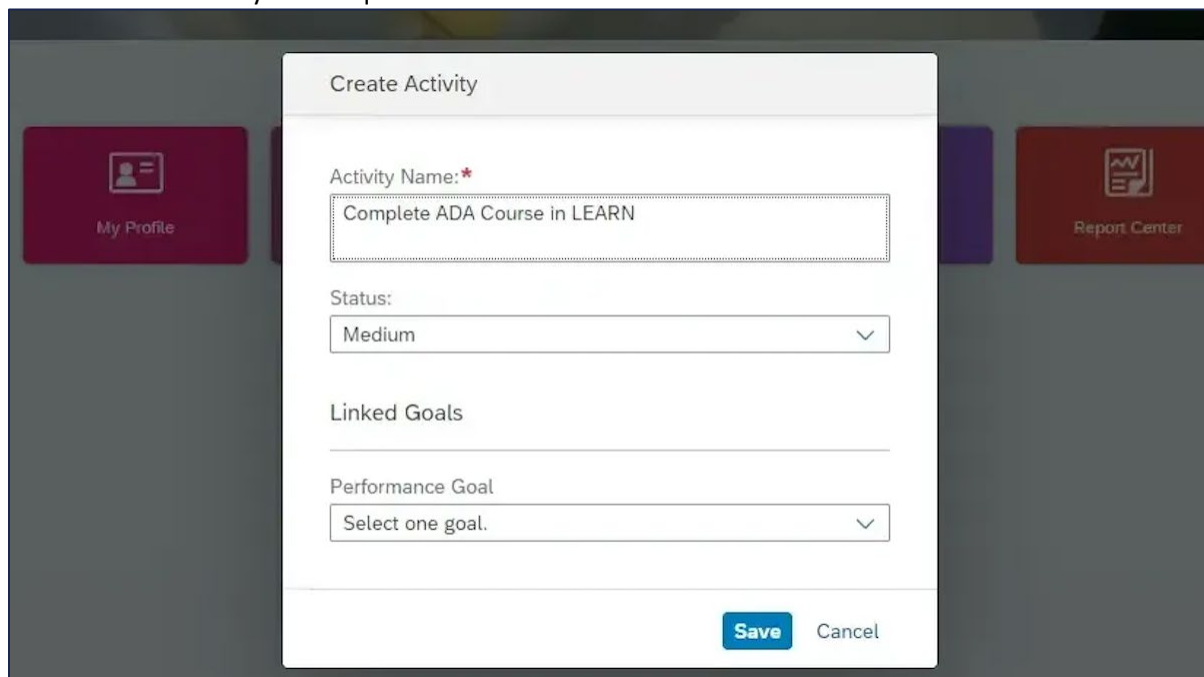
1. The easiest way to create an activity for yourself is to click on the "Create Activity" Quick Action tile.

NOTE: You cannot create activities for others from this tile. You must select "Continuous Performance" to create activities for others.



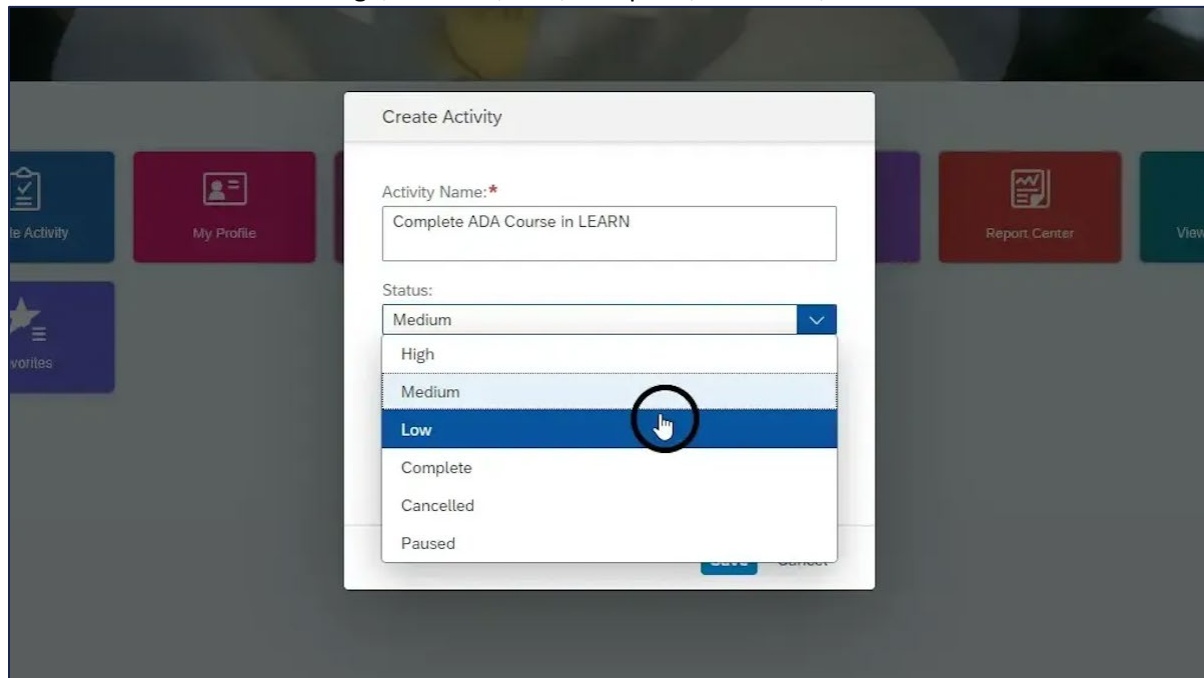
2. Type in the Activity Name.

NOTE: This is the only field required.



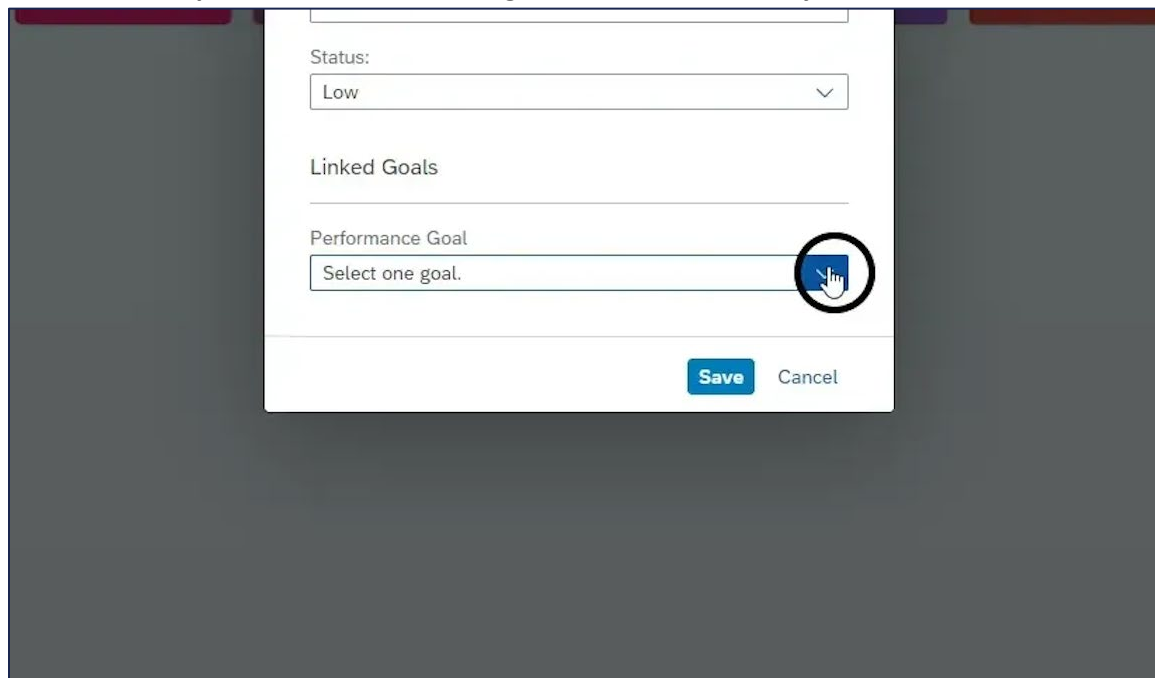
### 3. Select the Status of the activity.

NOTE: You can select from High, Medium, Low, Complete, Cancelled, and Paused. The default is Medium.



The screenshot shows a 'Create Activity' dialog box. The 'Activity Name' field contains 'Complete ADA Course in LEARN'. The 'Status' dropdown menu is open, showing options: Medium, High, Medium, Low, Complete, Cancelled, and Paused. The 'Low' option is highlighted with a blue bar and a hand cursor icon, indicating it is the selected status.

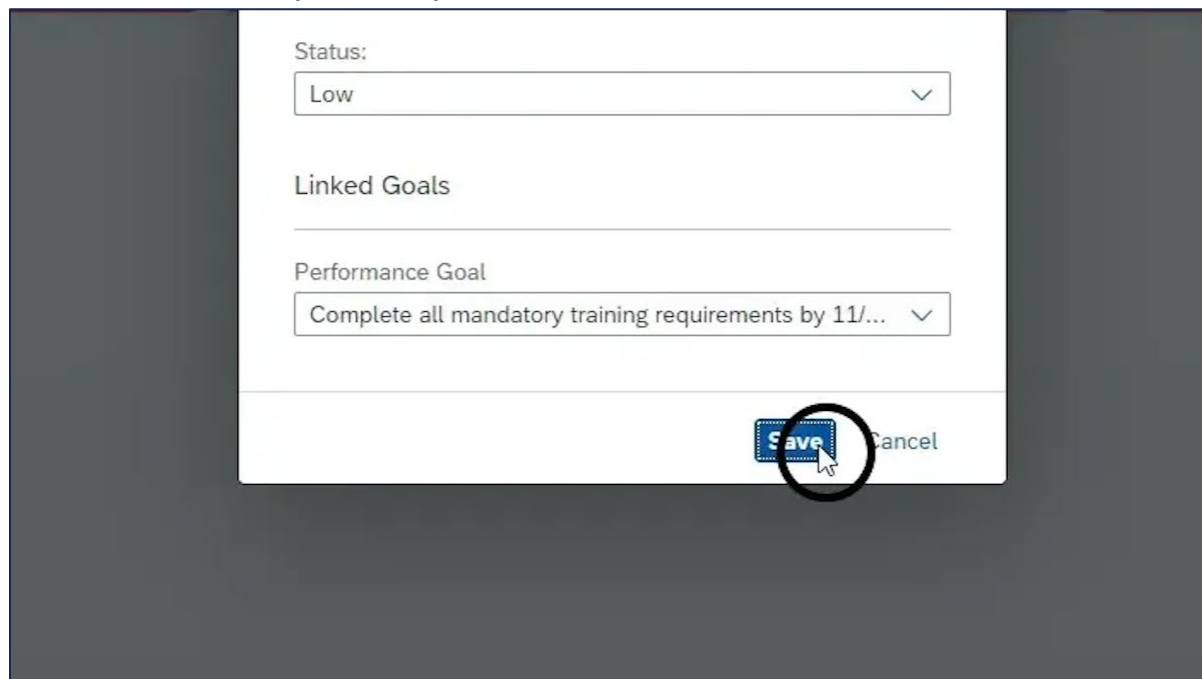
### 4. Use the drop-down menu to select a goal to link to the activity.



The screenshot shows the 'Create Activity' dialog box with the 'Status' dropdown set to 'Low'. Below the status field is a section titled 'Linked Goals'. Under this section, there is a 'Performance Goal' dropdown menu. The dropdown menu is open, showing the option 'Select one goal.' which is highlighted with a blue bar and a hand cursor icon, indicating it is the selected goal.



5. Click "Save" to add your activity.

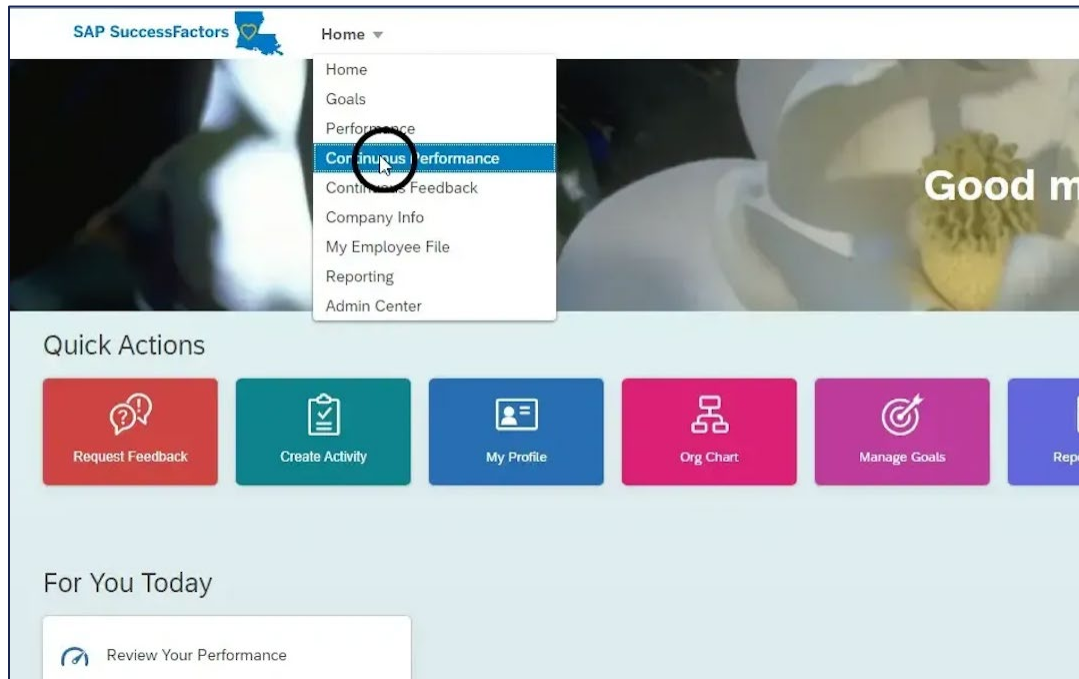


The screenshot shows a modal form with a dark gray background. The form is white and contains the following elements:

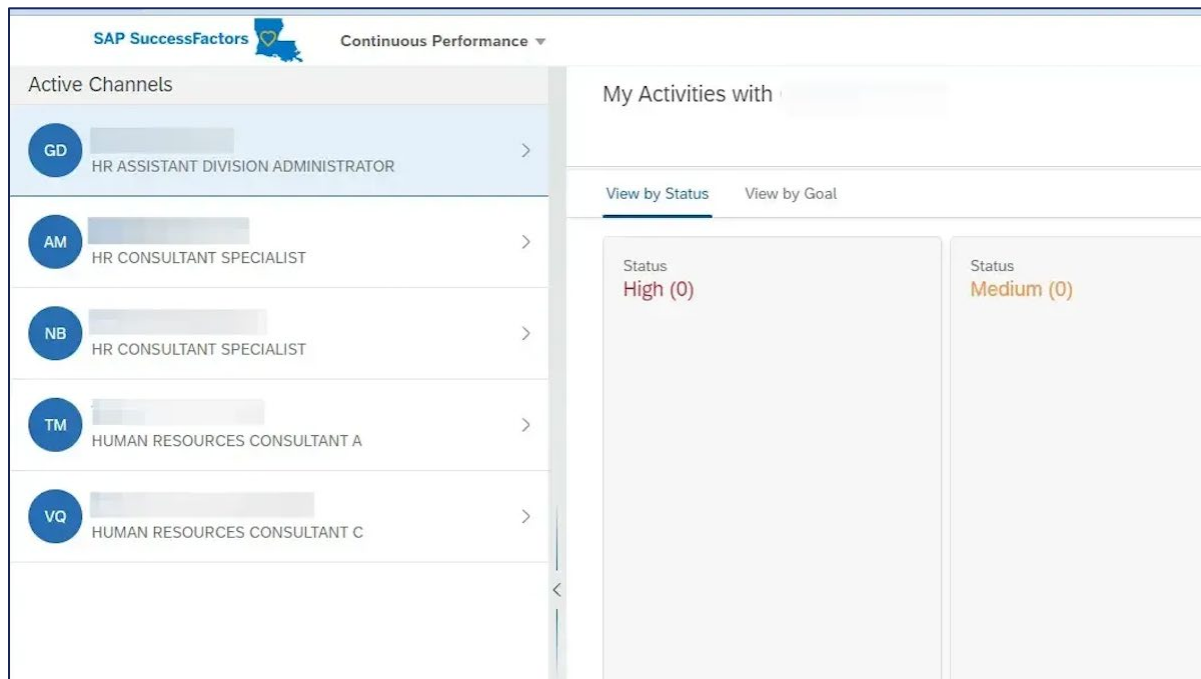
- Status:** A dropdown menu with "Low" selected and a downward arrow.
- Linked Goals:** A section header with a horizontal line below it.
- Performance Goal:** A dropdown menu with "Complete all mandatory training requirements by 11/..." selected and a downward arrow.
- Buttons:** At the bottom right, there are two buttons: "Save" (blue with white text) and "Cancel" (gray with black text). The "Save" button is circled with a black circle, and a mouse cursor is pointing at it.

## UPDATING / EDITING ACTIVITIES

### 1. Select "Continuous Performance" from the Home menu.



### 2. This section opens on "My Activities with <Supervisor>" If you would like to work with one of your employee's activities, click on the employee's name.



### 3. When you are on the correct Activity page, click on the Activity you want to edit.

NOTE: This view shows how to edit your own activities. The steps would be the same for editing an employee's activity.

The screenshot shows the SAP SuccessFactors Continuous Performance interface. At the top, there's a header with the SAP SuccessFactors logo and a dropdown menu set to 'Continuous Performance'. Below the header, it says 'My Activities with' followed by a blurred name. There are two tabs: 'View by Status' (selected) and 'View by Goal'. The main area displays four columns of activity cards:

- Status High (1):** Contains one card titled 'Develop PMGM tutorial video on goals' with a hand cursor clicking on it. The card is blue and says 'Updated today'.
- Status Medium (1):** Contains one card titled 'Attend ATD Tech conference' with a yellow border. It says 'Updated today' and 'Medium'.
- Status Low (1):** Contains one card titled 'Take ADA class online in LEARN' with a light gray border. It says 'Updated today' and 'Low'.
- Status Complete (3):** Contains three cards, all with green borders and 'Complete' status. The titles are partially visible: 'Attended Artic...', 'Completed all training course', and 'Attended Ado...'. All three say 'Updated on Oct 7...'.

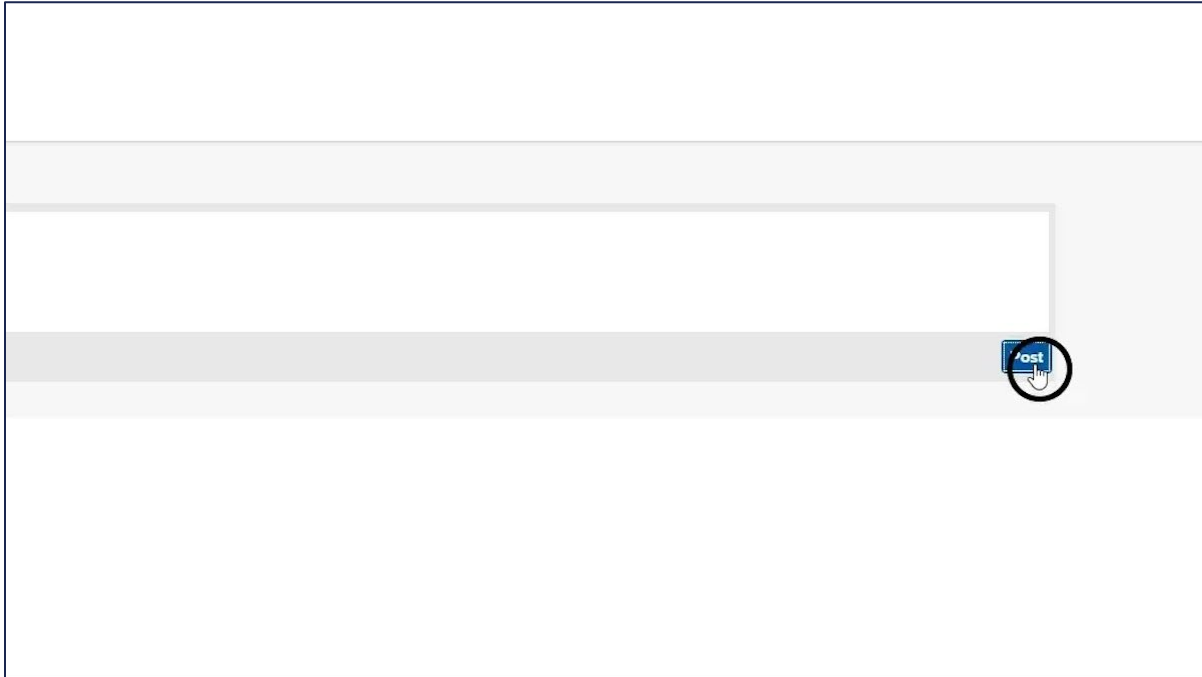
### 4. Type your Activity Update.

The screenshot shows the 'Activities / Activity Details' page for the activity 'Develop PMGM tutorial video on goals'. The page has a header with the SAP SuccessFactors logo and a dropdown menu set to 'Continuous Performance'. Below the header, it says 'Activities / Activity Details' and the activity title 'Develop PMGM tutorial video on goals'. There are four sections of metadata:

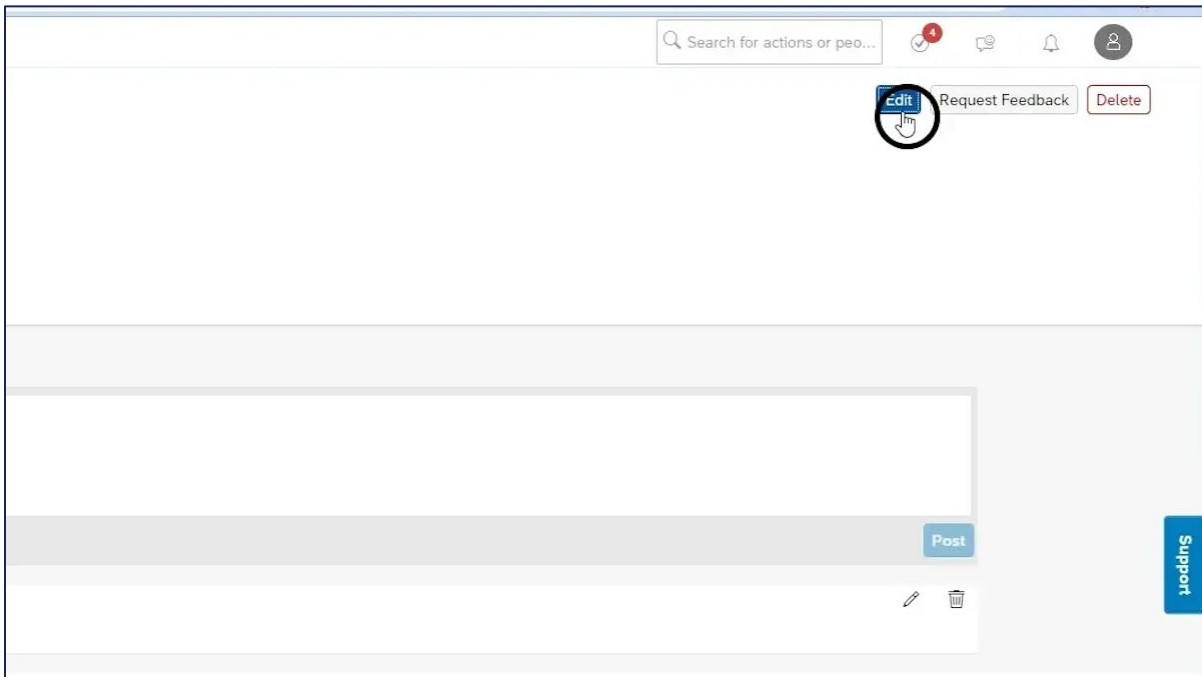
- Status:** High
- Created On:** Oct 21, 2022
- Attachments:** [View Attachments \(0\)](#)
- Feedback Received:** No
- Last Updated:** Oct 21, 2022
- Goal:** [Linked Goals \(1\)](#)

Below the metadata is an 'Updates' section. It contains a text input field with the placeholder text 'Post an activity update.' and a cursor. Below the input field is a large empty rectangular area for posting the update.

5. Click "Post" to add your update to the activity.



6. Click the "Edit" button to edit the activity.



## 7. You can edit any field in the activity.

NOTE: The "Save" button is disabled until you edit a field. If you don't want to edit, click "Cancel."

**Edit Activity**

Activity Name: \*  
Develop PMGM tutorial video on goals

Status:  
High

Linked Goals

Performance Goal  
Create 17 PMGM video tutorials for statewide use 12...

Attachments (1) ⓘ Add

Use the "Add" button to add up to 5 files. Once added, files are uploaded when you choose Save.

10-PES Agency Transfer Form...  
File Size: 31.6 KB  
Uploaded On: Oct 21, 2022  
Uploaded By:

Save Cancel

## 8. If you change the Status to "Complete," you can create an achievement by clicking the box "Mark as an achievement."

NOTE: Achievements appear on the form and are an easy way to track completion of goal milestones and completion.

**Edit Activity**

Activity Name: \*  
Revise script for PMGM goals video

Status:  
Complete

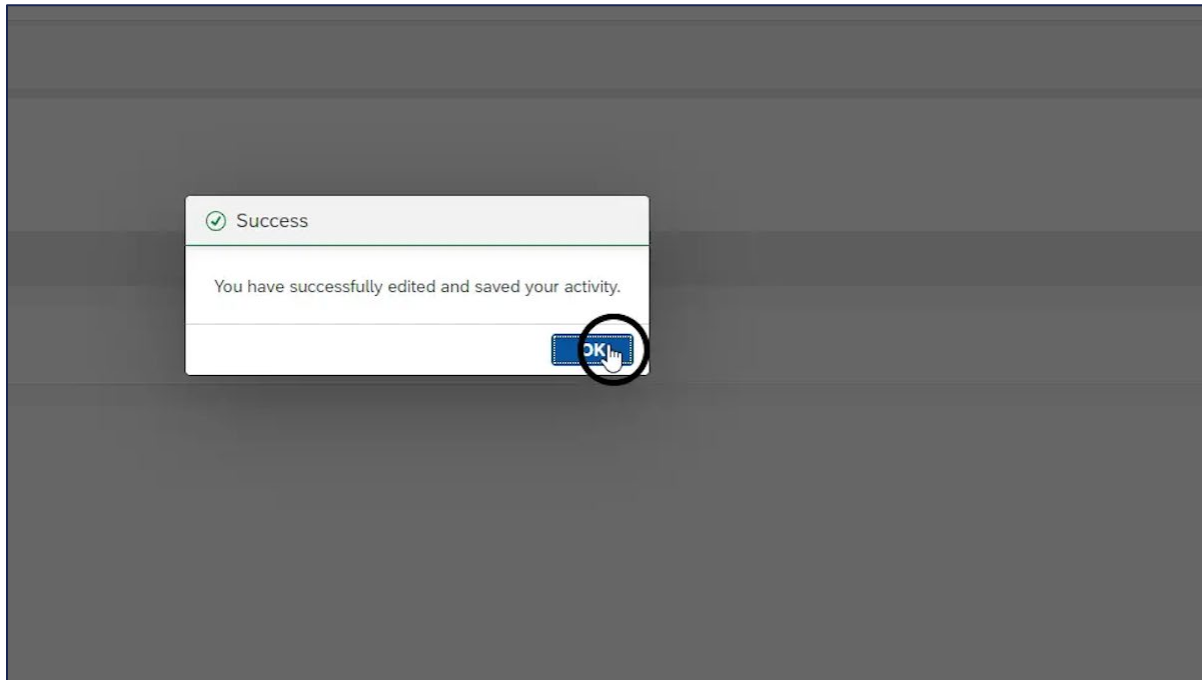
☒ Mark as an achievement

Linked Goals

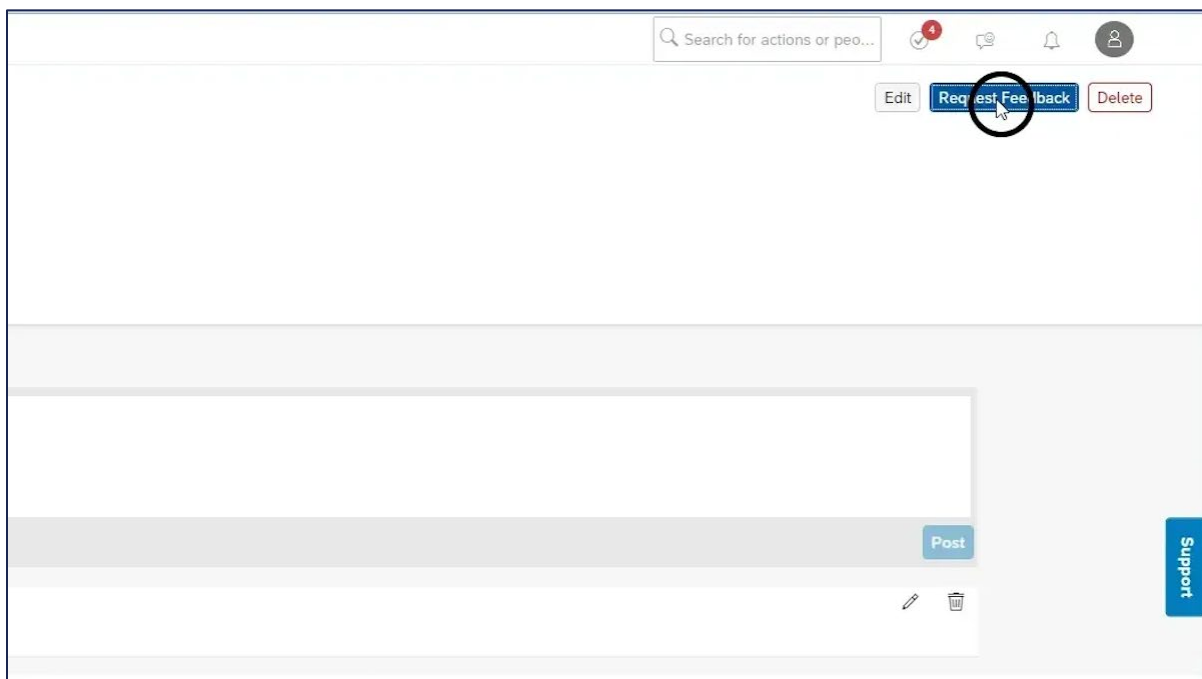
Performance Goal  
Create 17 PMGM video tutorials for statewide use 12...

Attachments (0) ⓘ Add

9. You will get a confirmation after you have edited and saved your activity. Click "OK."



10. From the Activity Update screen, click the "Request Feedback" button to request feedback related to this activity.



## 11. Select the individual(s) from whom you are requesting feedback.

NOTE: You can request feedback from any individual in the system, regardless of agency, title, or relationship. This field is required.

## 12. Enter the "Feedback Topic."

NOTE: This field is required.

13. To customize the feedback, click the pencil icon to edit the questions.

Request Feedback

Select people

Choose one or more people:\*

Select at least one person for this feedback

HR CONSULTANT SUPERVISOR

Enter a topic and at least one question.

Feedback Topic:\*

Script for PMGM goals tutorial.

Question 1:  
What went well?

Question 2:  
What could I improve on?

Question 3:  
Any additional comments?

14. When you are finished, click "Send."

Request Feedback

Select people

Choose one or more people:\*

Select at least one person for this feedback

HR CONSULTANT SUPERVISOR

Enter a topic and at least one question.

Feedback Topic:\*

Script for PMGM goals tutorial.

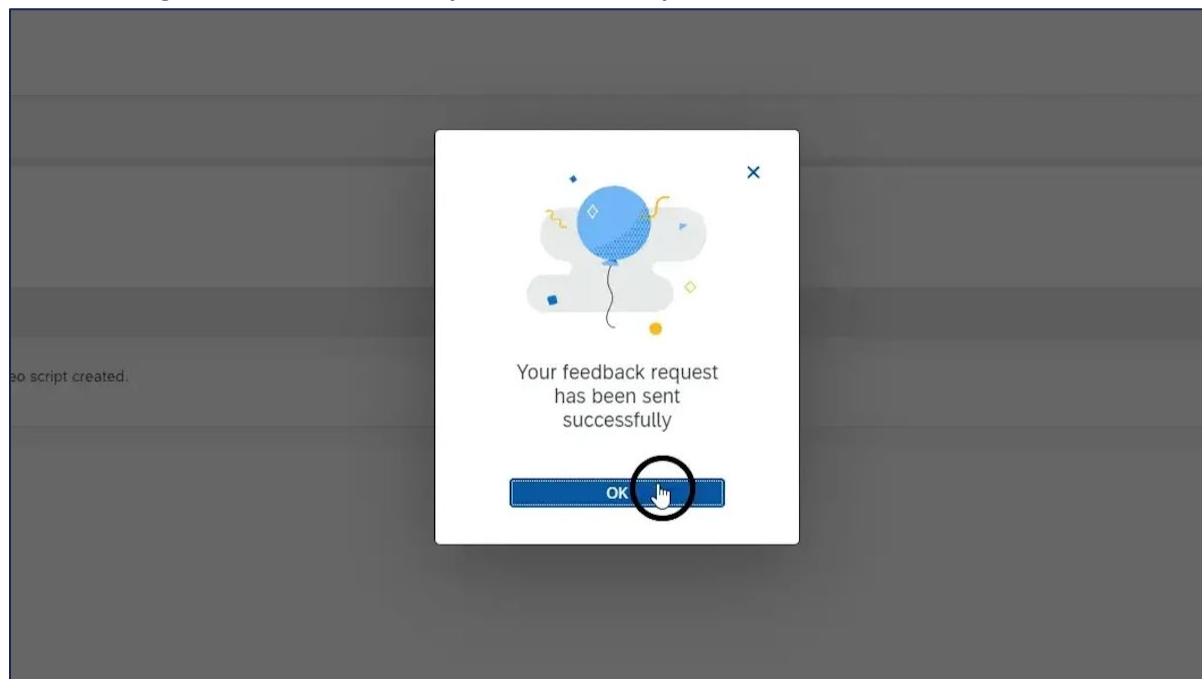
Question 1:  
What went well?

Question 2:  
What could I improve on?

Question 3:  
Any additional comments?

Send Cancel

15. You will get a confirmation that your feedback request was sent. Click "OK."



## USING THE MEETING TOOL

**WHAT:** The Meeting Tool allows supervisors and employees to schedule meetings to discuss performance, development, and growth. It also provides a storage location for supervisory meeting notes, which can serve as performance documentation.

**WHEN:** Use the meeting tool when having performance development discussions.

**WHY:** The Meeting Tool encourages you not only to schedule and complete performance discussions, but it helps frame those discussions by directing attention to those activities that are proven to help performance improve: practice, feedback, and learning activities. Using and tracking practice, feedback, and learning activities help employees build competence and skills that ultimately help the agency achieve its mission.

### SF NOTES:

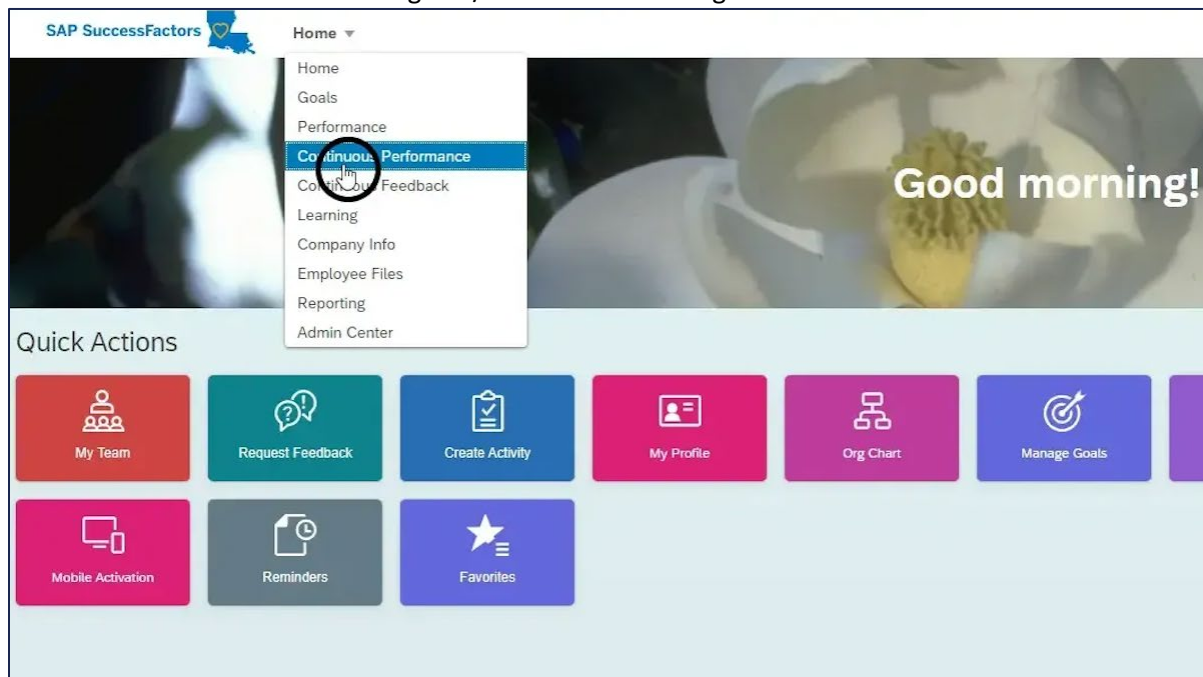
- *The employee is restricted to only meeting with their immediate supervisor.*
- *The employee cannot create goals.*
- *When the supervisor requests feedback for the employee, both the supervisor and the employee can see the feedback request and feedback given. However, when the employee requests feedback from someone other than the supervisor, the supervisor cannot see the feedback request or feedback given.*



## USING THE MEETING TOOL - SUPERVISOR

### 1. Click "Continuous Performance" in the Home menu.

**NOTE:** This tool can be used during and/or after the meeting to document the discussion.



## 2. Click on the individual with whom you want to meet.

NOTE: You can only set up a meeting with the individuals on your list. This includes your immediate supervisor and direct reports. Employees without direct reports can only meet with their immediate supervisor.



SAP SuccessFactors Continuous Performance

Active Channels

- GD HR ASSISTANT DIVISION ADMINISTRATOR
- AM HR CONSULTANT SPECIALIST** (highlighted with a hand cursor)
- NB HR CONSULTANT SPECIALIST
- TM HUMAN RESOURCES CONSULTANT A
- VQ HUMAN RESOURCES CONSULTANT C

My Activities with

View by Status View by Goal

Status High (0)

Status Medium (0)

## 3. Click "Start Meeting" to start open the Activities/Meeting page.

Search for actions or peo...

Create Activity **Start Meeting** Achievements

Status Medium (1)

Attend ATD Tech conference

Updated today Medium

Status Low (1)

Take ADA class online in LEARN

Updated today Low

Status Complete (3)

Attended Articulate workshop

Updated on Oct 7, 2022 Complete

Completed all mandatory training courses

Updated on Oct 7, 2022 Complete

Attended Adobe workshop

Updated on Oct 7, 2022 Complete

Status Cancelled (0)

Support

**4. This is the Activities/Meeting page. At the top, you can review updates for Activities, Achievements, and Completed Activities.**

NOTE: You cannot view click on the updates to view them. You can, however, view them under individual Activities.

**5. Click "Meeting Notes" to open the field to type in your personal meeting notes. Click "Save" to save your notes.**

NOTE: These notes are only visible to you. They stay within the meeting page and do not appear anywhere else in SuccessFactors.

6. Click "Save and Finish" when you have completed documenting the meeting.

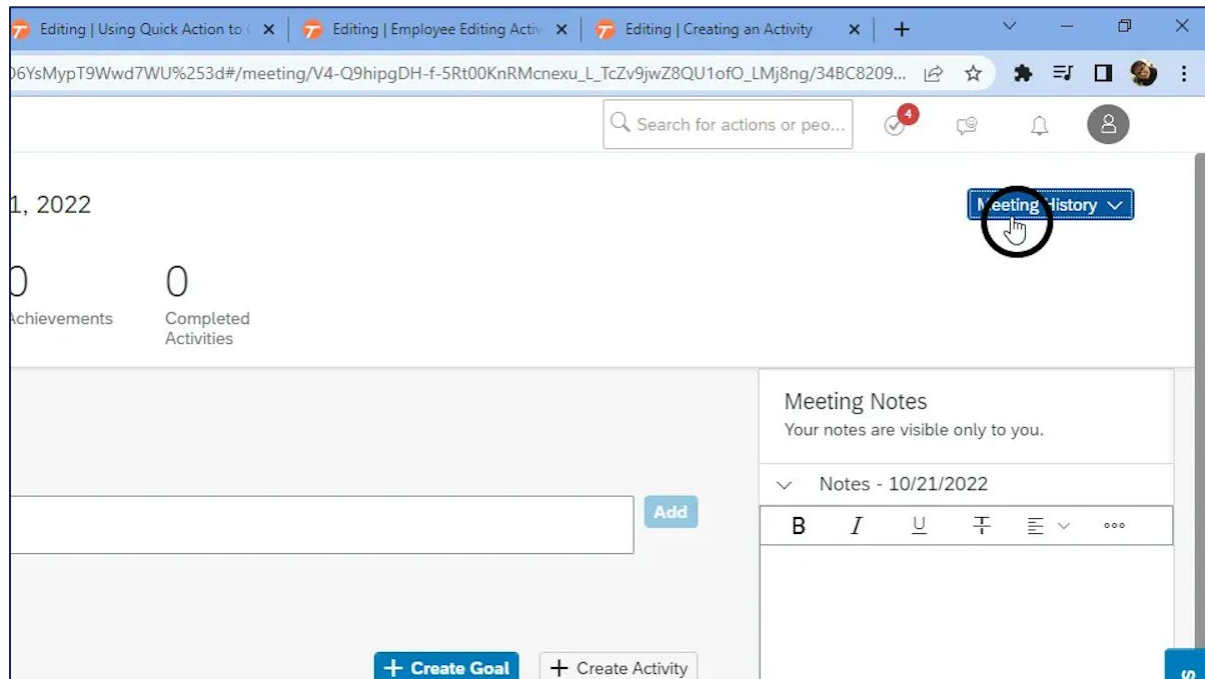
The screenshot shows a meeting documentation form. On the right side, there is a vertical sidebar with a blue 'Support' button at the top and a 'Save' button below it. The main area of the form contains several text input fields. At the bottom right of the form, there are two buttons: 'Save and Finish' and 'Cancel'. The 'Save and Finish' button is circled in red, and a mouse cursor is pointing at it.

7. You must click "Save" to add the meeting notes to the Meeting History.

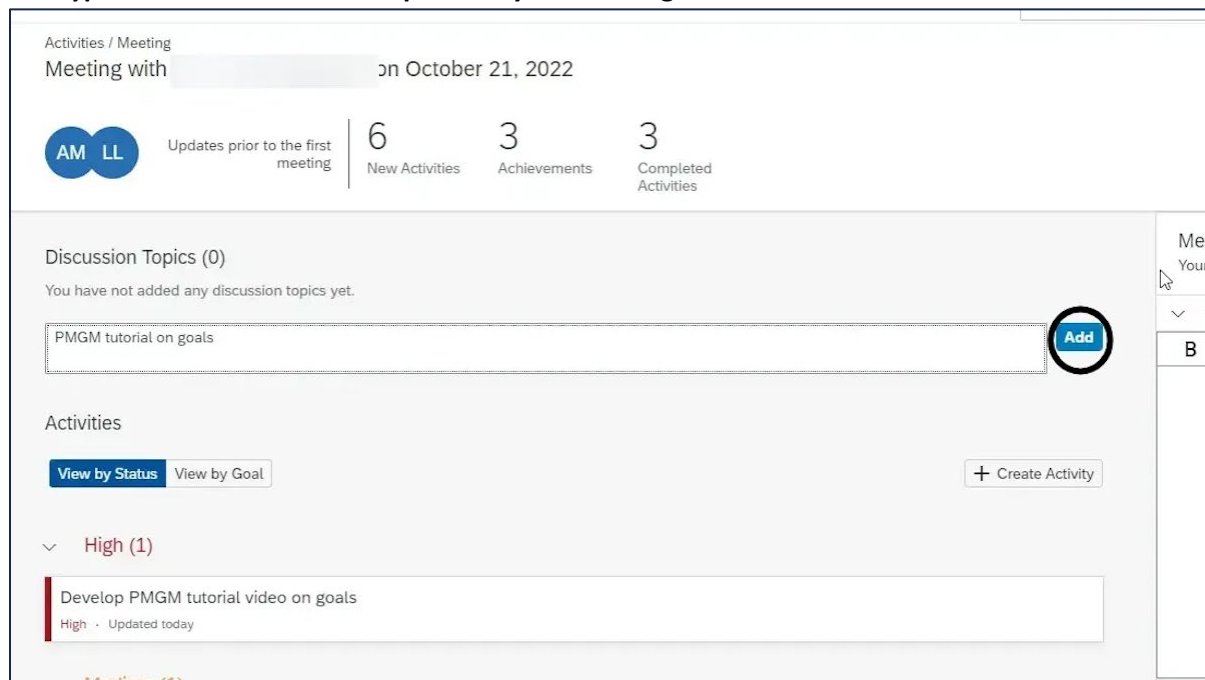
NOTE: Do not click "Save" unless you are finished documenting. You can't edit the saved meeting. If you click on "Cancel," it will return you to the meeting page.

The screenshot shows the 'Meeting History' page. At the top, there are tabs for 'New Activity', 'Achievement', and 'Completed Activity'. Below the tabs, there is a section for 'Discussion Topics (0)' with a text input field and a 'Save' button. Below this, there is a section for 'Activities' with a 'View by Status' button and a 'View by Goal' button. A dialog box titled 'Save to Meeting History?' is open in the center of the screen. The dialog box contains the text: 'Meetings in the following activity statuses, along with your completed discussion topics, will be archived in the meeting history: Complete, Cancelled. You can't edit the saved meeting.' At the bottom of the dialog box, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red, and a mouse cursor is pointing at it.

**8. Click the "Meeting History" button to review all prior meetings with an individual.**



**9. Type and add "Discussion Topics" for your meeting.**



## 10. You can view Activities either by Status or by Goal.

NOTE: By Status is the default view. You will need to click the "View by Goal" button to see that view.

## 11. When you are in the Goal view, if the Goal Plan is UNAPPROVED, you may add a goal from the Activities/Meeting page.

NOTE: If the Goal Plan is APPROVED, the button will not be available.

## 12. From either the Status or the Goal view, you may create an activity by clicking the "Create Activity" button.

**AM LL**

Updates prior to the first meeting

**6**

New Activities

**3**

Achievements

**3**

Completed Activities

---

### Discussion Topics (0)

You have not added any discussion topics yet.

Add

### Activities

View by Status
View by Goal

+ Create Goal
- Create Activity

#### Performance Goals

- v Not Linked to Goals (1)
 

Completed all mandatory training courses

Complete · Updated on Oct 7, 2022
- v Complete all mandatory training requirements by 11/1/2022 (0)

**13. Click on an activity to view and to update an activity.**

AM LL

7

New Activities

3

Achievements

3

Completed Activities

Discussion Topics (0)

You have not added any discussion topics yet.

Activities

View by Status

View by Goal

High (2)

Develop PMGM tutorial video on goals

High · Updated today

Revise script for PMGM goals video

High · Updated today

#### 14. Click the "Edit" button to edit the activity information.

Activity Details

PMGM goals video

On: 022 Attachments: View Attachments (0) Feedback Received: No

ated: 022 Goal: Linked Goals (1)

te.

Post

Y: Script is almost completed.

The screenshot shows the 'Activity Details' page for an activity named 'PMGM goals video'. At the top right, there is a search bar and several icons. Below the activity name, there are buttons for 'Edit', 'Request Feedback', and 'Delete'. The 'Edit' button is circled in blue. The page also displays metadata such as 'On: 022', 'Attachments: View Attachments (0)', 'Feedback Received: No', 'ated: 022', and 'Goal: Linked Goals (1)'. There is a large text area for the activity description, a 'Post' button, and a status message 'Y: Script is almost completed.' at the bottom.

#### 15. You can edit the Activity Name, Status, and Performance Goal.

g / Activity Details

for PMGM

ated On: 21, 2022

t Updated: 23, 2022

update.

TALLEY: Script

**Edit Activity**

Activity Name: \*  
Revise script for PMGM goals video

Status:  
High

Linked Goals

Performance Goal Create Goal  
Create 17 PMGM video tutorials for statewide use 12... ▾

Attachments (0) ⓘ Add

The screenshot shows the 'Edit Activity' modal form. The 'Status' dropdown menu is open, showing 'High'. The 'Performance Goal' dropdown is also visible, showing 'Create 17 PMGM video tutorials for statewide use 12...'. The 'Activity Name' field contains 'Revise script for PMGM goals video'. The 'Attachments' section shows '(0)' with an information icon and an 'Add' button. The background shows the 'Activity Details' page for 'PMGM goals video' with various metadata and a search bar.

16. If you change the Status to "Complete," you can create an achievement by clicking the box "Mark as an achievement."

Activities / Meeting / Activity Details

Revise script for PMGM

Status: High Created On: Oct 21, 2022 Last Updated: Oct 23, 2022

Updates

Post an activity update.

LL LACI L TALLEY: Script Updated today

**Edit Activity**

Activity Name: \*  
Revise script for PMGM goals video

Status: Complete

☒ Mark as an achievement

Linked Goals

Performance Goal Create Goal  
Create 17 PMGM video tutorials for statewide use 12...

Attachments (0) Add

Document icon

17. Click "Save" to save your activity edits.

LACI L TALLEY: Script Updated today

Attachments (0) Add

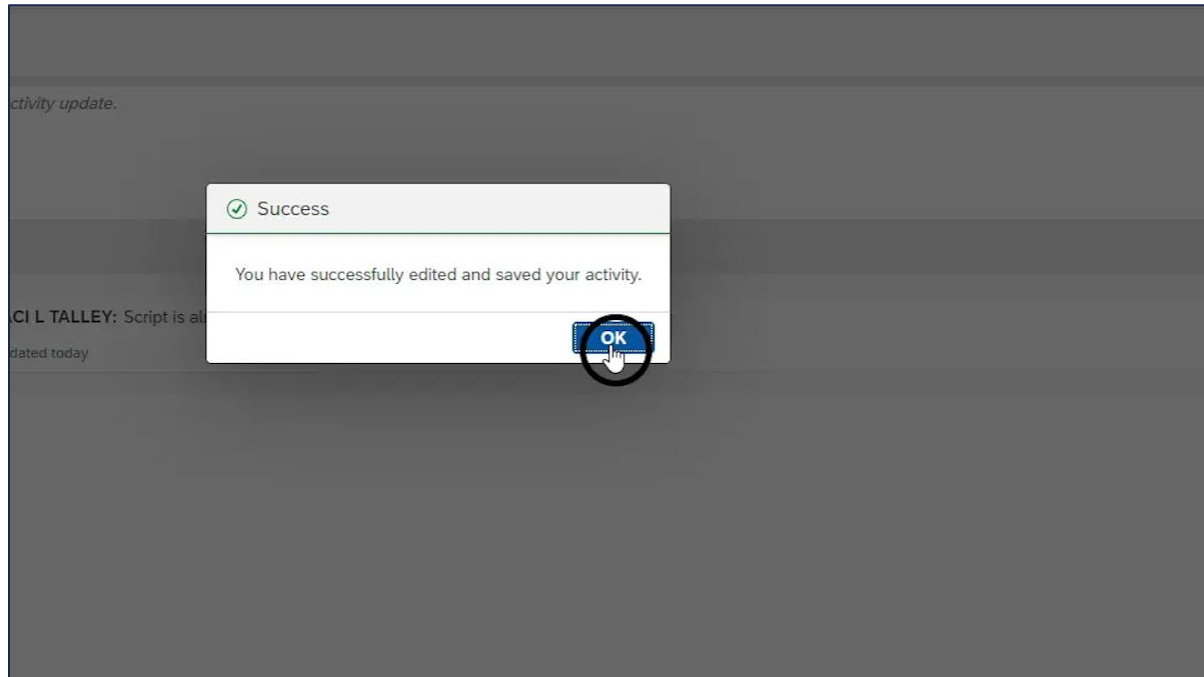
Document icon

No Attachments

Use the "Add" button to add up to 5 files. Once added, files are uploaded when you choose Save.

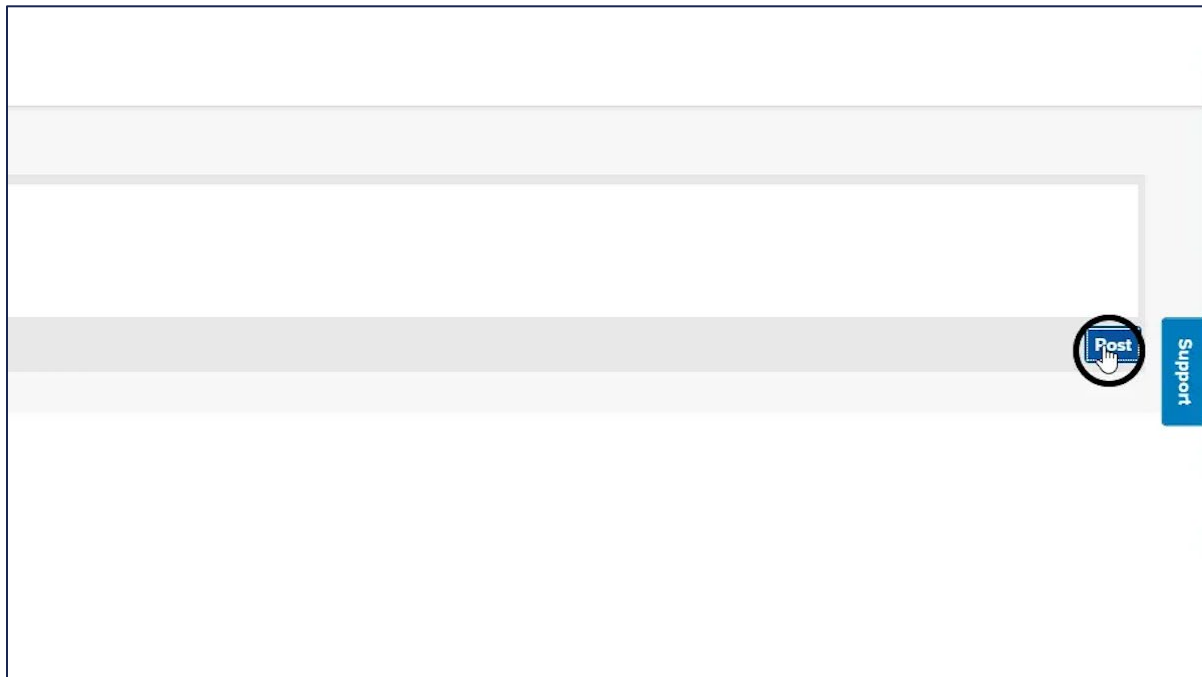
Save Cancel

**18. Click "OK" when you see the confirmation message.**

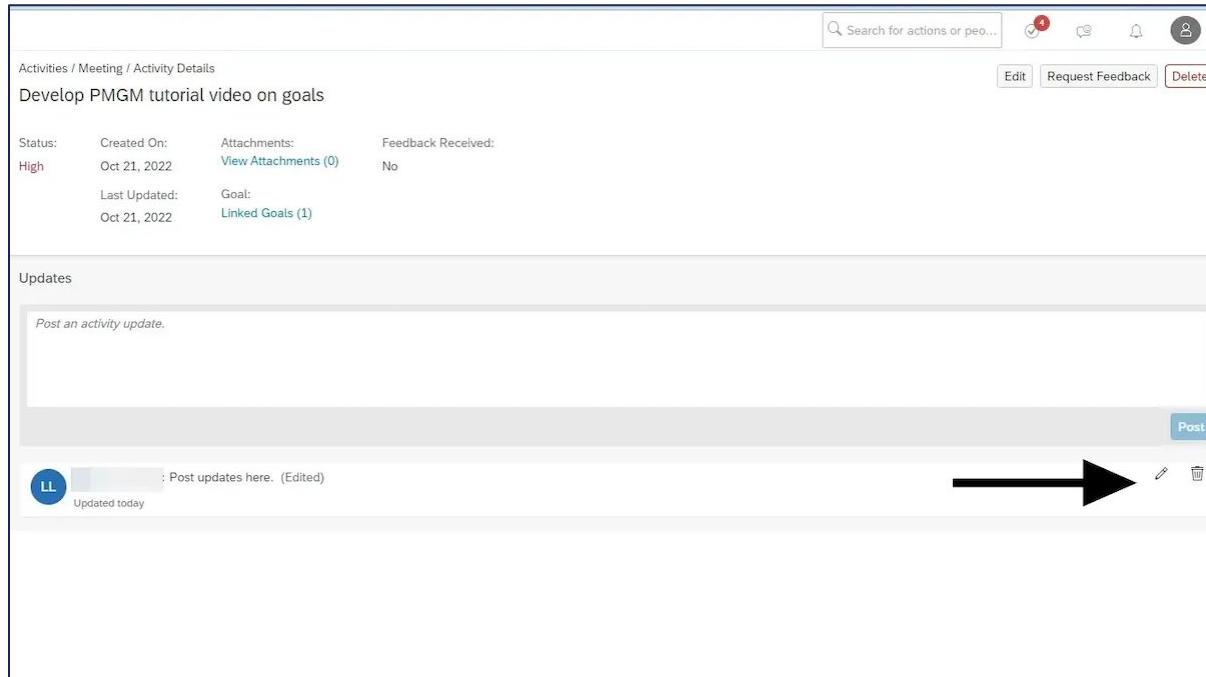


**19. Type and post any activity updates.**

NOTE: These updates remain in the "Activity Details" section. These comments do not appear on the Goal Plan or form.

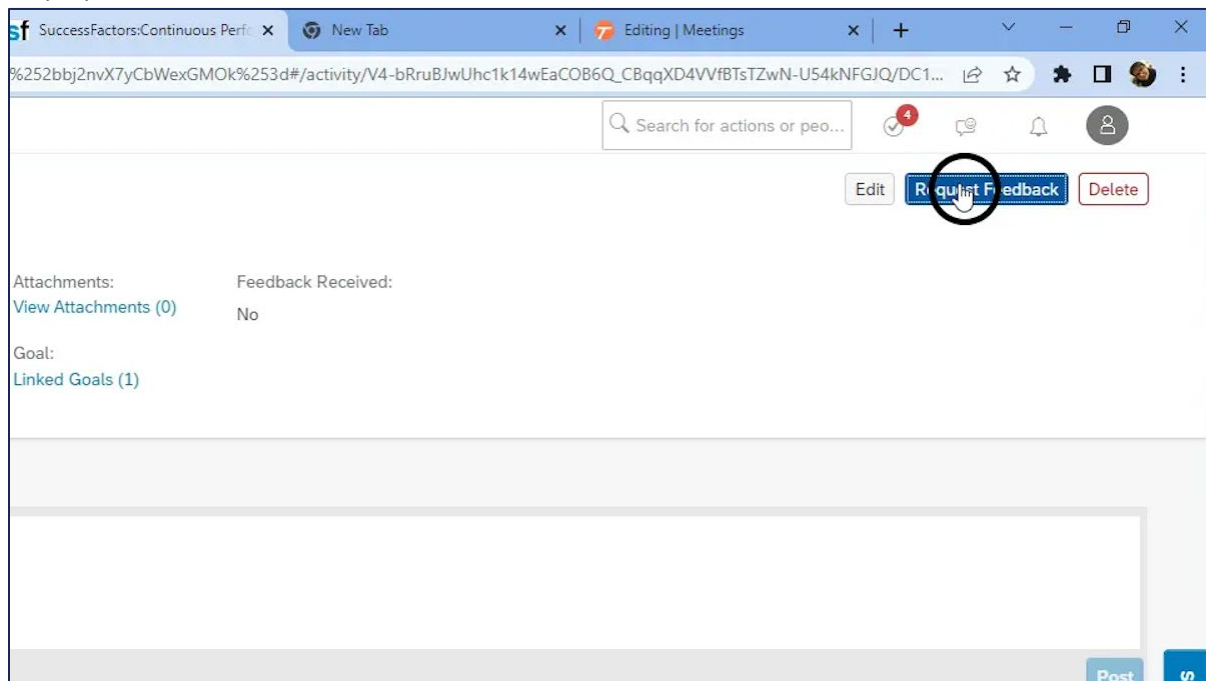


## 20. Posted updates can be edited or deleted.



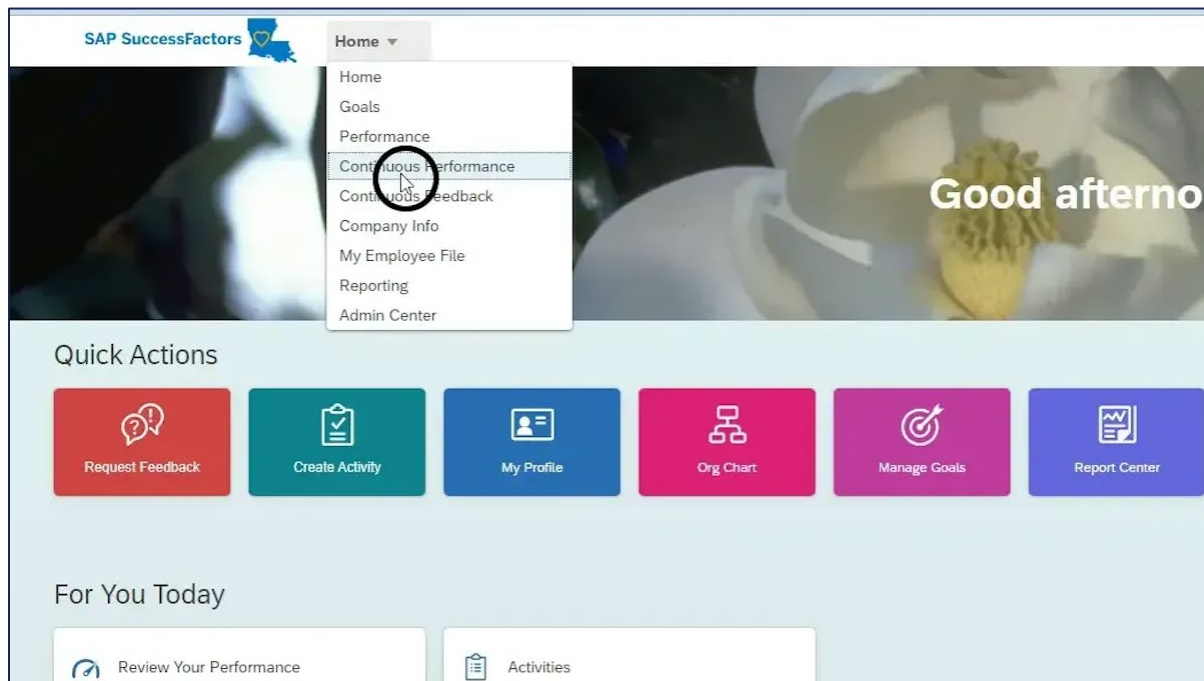
## 21. Click the "Request Feedback," if you would like to request feedback on behalf of your direct report.

NOTE: If you request feedback for a direct report, the feedback will be visible to both you and your employee.

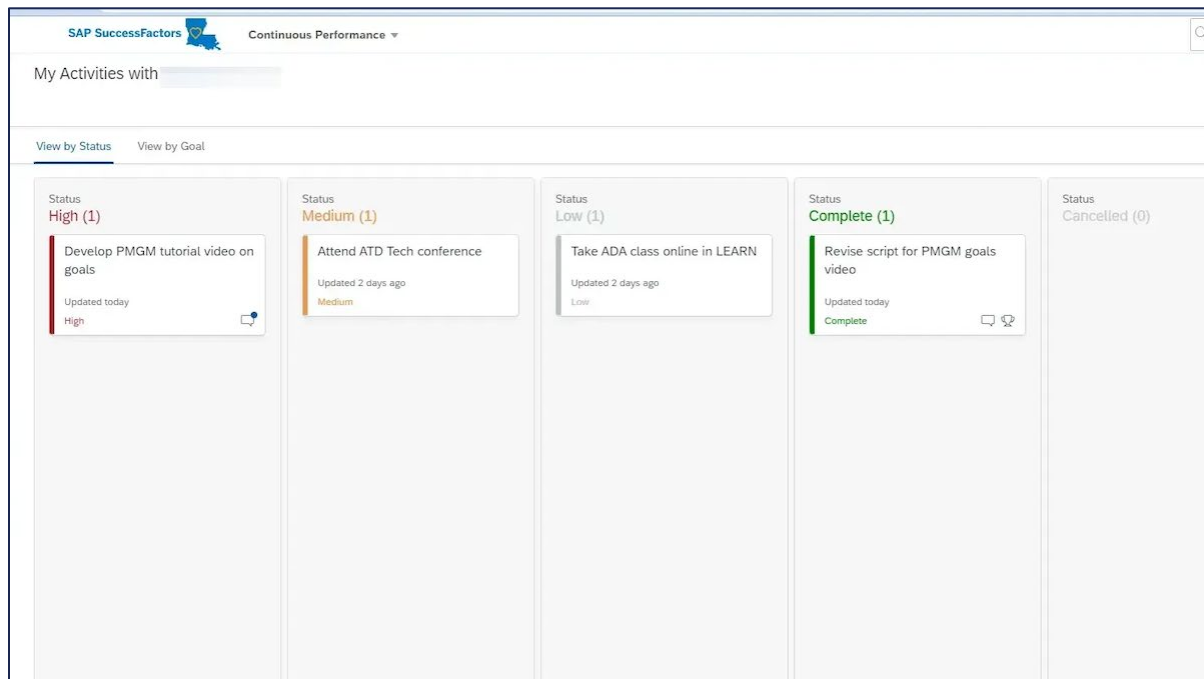


## USING THE MEETING TOOL – EMPLOYEE

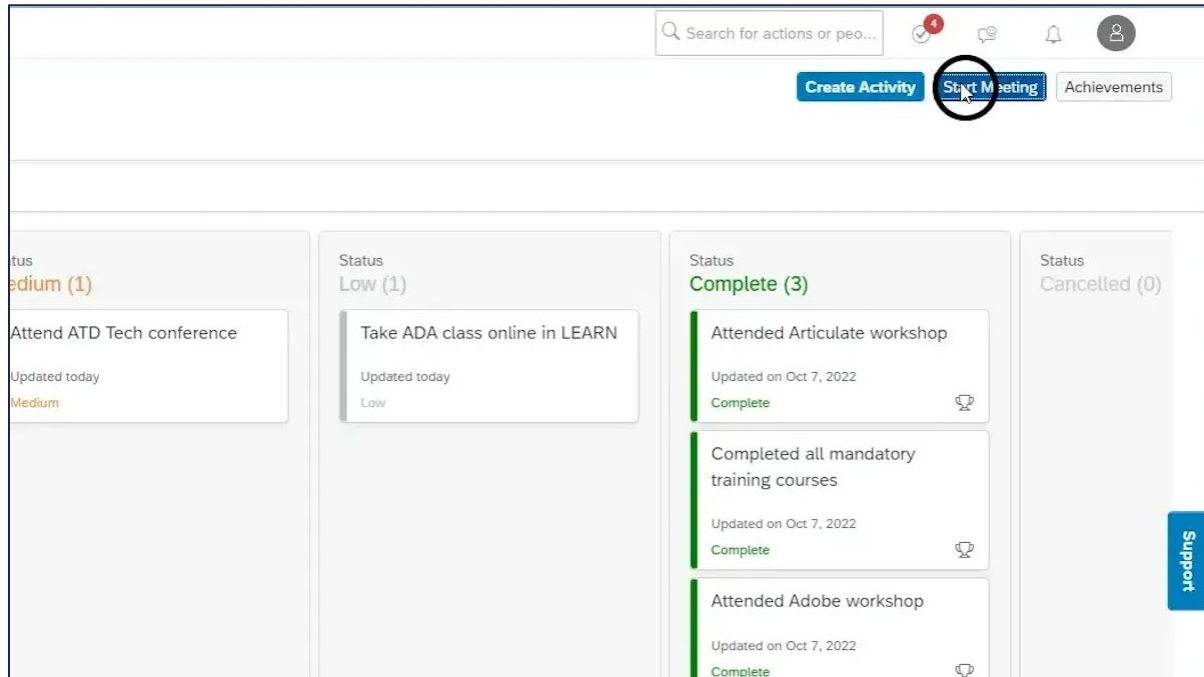
### 1. Click on "Continuous Performance" in the Home menu.



### 2. As an employee without direct reports, you are restricted to meeting only with your immediate supervisor.

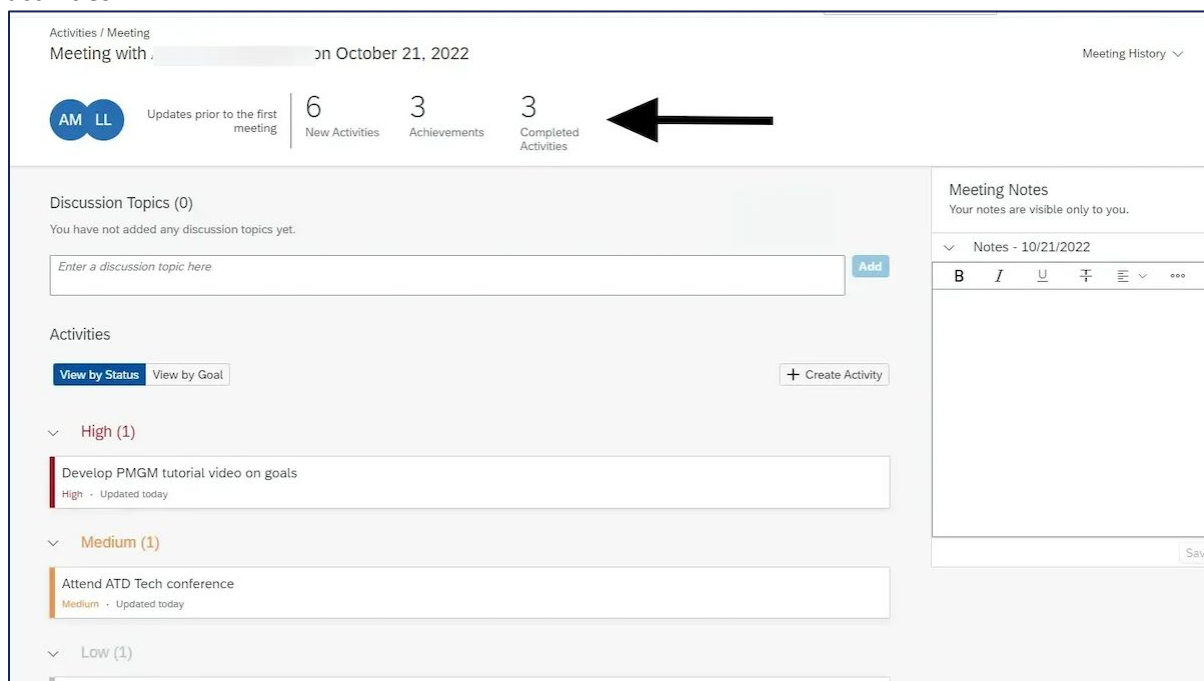


### 3. Click "Start Meeting" to start open the Activities/Meeting page.



### 4. This is the Activities/Meeting page. At the top, you can review updates for Activities, Achievements, and Completed Activities.

NOTE: You cannot view click on the updates to view them. You can, however, view them under individual activities.



5. Click "Meeting Notes" to open the field to type in your personal meeting notes. Click "Save" to save your notes.

NOTE: These notes are only visible to you. They stay within the meeting page and do not appear anywhere else in SuccessFactors.



Meeting Notes  
Your notes are visible only to you.

Notes - 10/21/2022

B I U T E V ...

Today we discussed...

+ Create Goal + Create Activity

Save

6. Click "Save and Finish" when you have completed documenting the meeting.

Meeting Notes  
Your notes are visible only to you.

Notes - 10/21/2022

B I U T E V ...

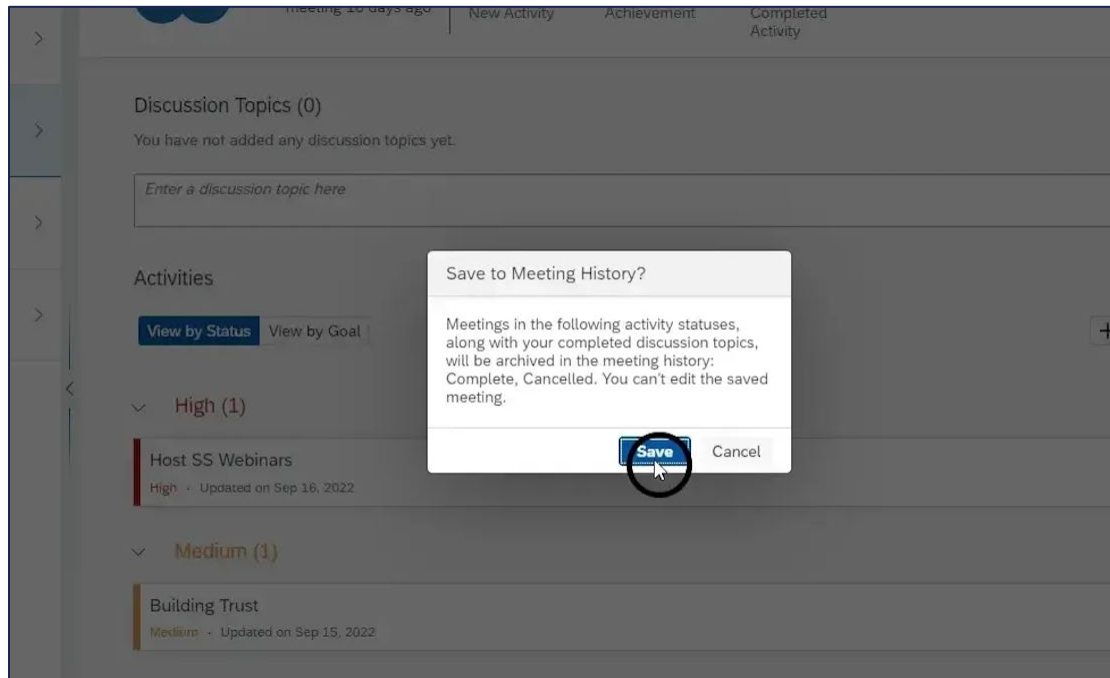
Today we discussed...

+ Create Goal + Create Activity

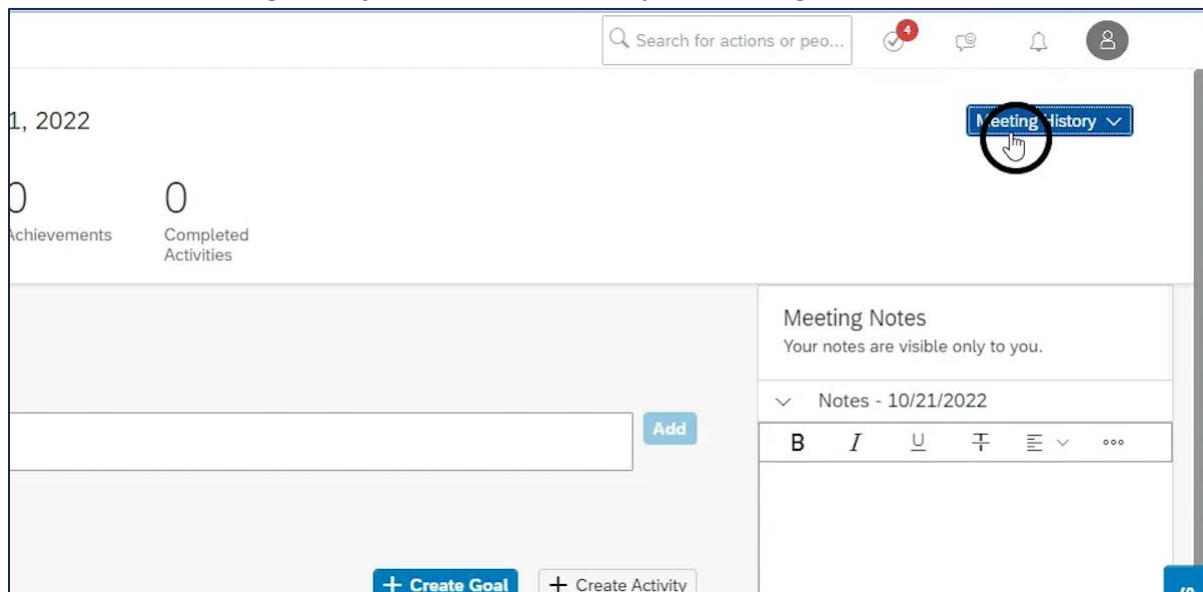
Save and Finish Cancel

**7. You must click "Save" to add the meeting notes to the Meeting History.**

NOTE: Do not click "Save" unless you are finished documenting. You can't edit the saved meeting. If you click on "Cancel," it will return you to the meeting page.



**8. Click the "Meeting History" button to review all prior meetings with an individual.**



## 9. Type and add "Discussion Topics" for your meeting.

Activities / Meeting  
Meeting with [redacted] on October 21, 2022

AM LL Updates prior to the first meeting

6 New Activities | 3 Achievements | 3 Completed Activities

Discussion Topics (0)  
You have not added any discussion topics yet.

PMGM tutorial on goals Add

Activities

View by Status View by Goal + Create Activity

High (1)

Develop PMGM tutorial video on goals  
High · Updated today

## 10. You can view Activities either by Status or by Goal.

NOTE: By Status is the default view. You will need to click the "View by Goal" button to see that view.

Activities / Meeting  
Meeting with [redacted] on October 21, 2022

AM LL meeting | New Activities | Achievements | Completed Activities

Discussion Topics (0)  
You have not added any discussion topics yet.

Enter a discussion topic here Add

Activities

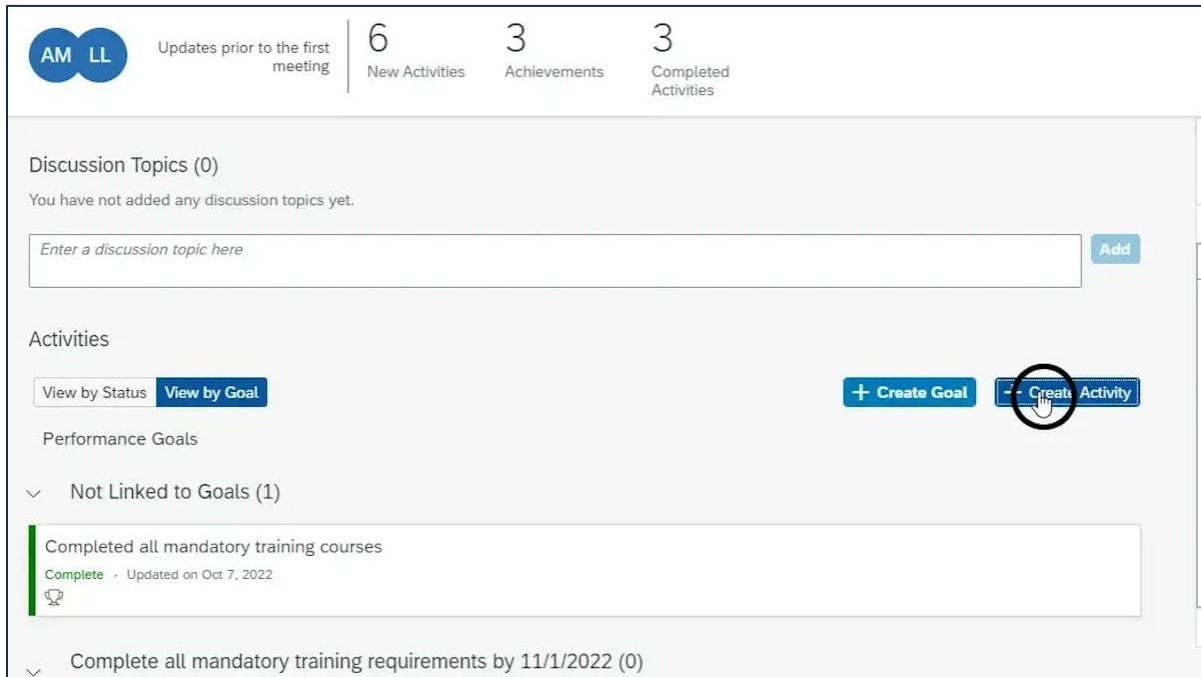
View by Status View by Goal + Create Activity

High (1)

Develop PMGM tutorial video on goals  
High · Updated today

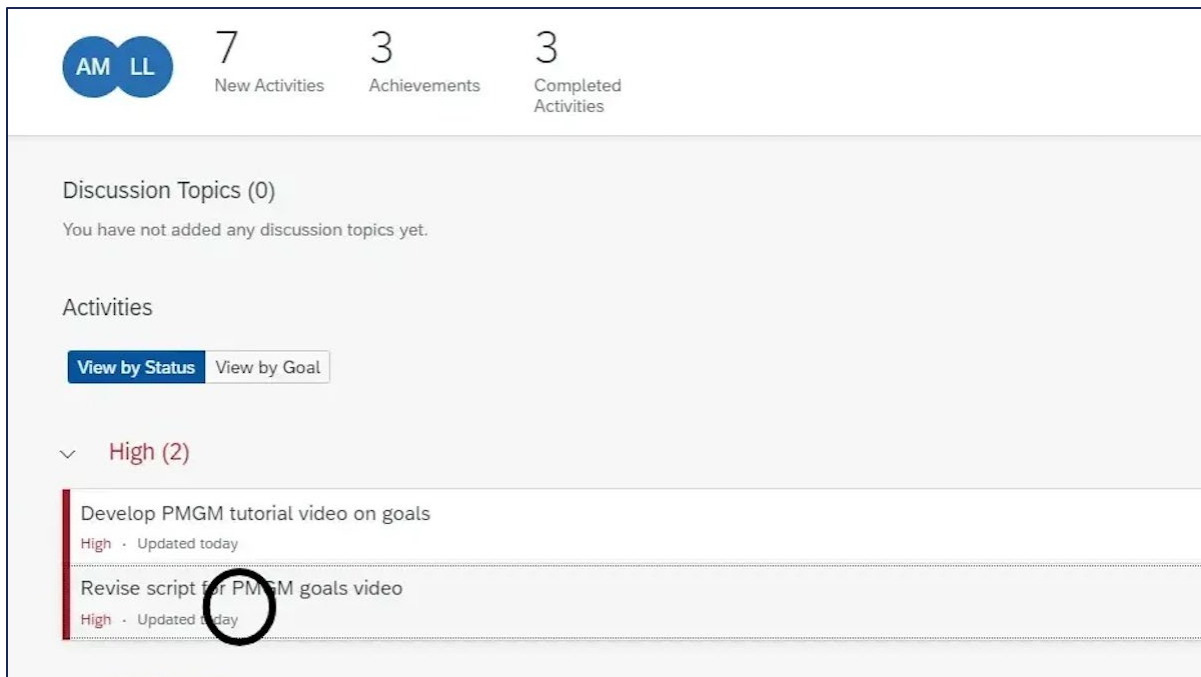
Medium (1)

11. From either the Status or the Goal view, you may create an activity by clicking the "Create Activity" button.



The screenshot shows the SAP SuccessFactors dashboard. At the top, there are two circular buttons labeled 'AM' and 'LL'. To their right, it says 'Updates prior to the first meeting'. Further right, there are three statistics: '6 New Activities', '3 Achievements', and '3 Completed Activities'. Below this, there is a section for 'Discussion Topics (0)' with a message 'You have not added any discussion topics yet.' and an 'Add' button. Underneath is an 'Activities' section with two tabs: 'View by Status' and 'View by Goal'. To the right of these tabs are two buttons: '+ Create Goal' and '- Create Activity'. The '- Create Activity' button is circled in black. Below the tabs, there is a section for 'Performance Goals' with a dropdown arrow and the text 'Not Linked to Goals (1)'. Under this, there is a list item: 'Completed all mandatory training courses' with a green bar on the left, the status 'Complete', and the date 'Updated on Oct 7, 2022'. Below this is another list item: 'Complete all mandatory training requirements by 11/1/2022 (0)' with a dropdown arrow.

12. Click on an activity to view and to update an activity.



The screenshot shows the SAP SuccessFactors dashboard. At the top, there are two circular buttons labeled 'AM' and 'LL'. To their right, it says '7 New Activities', '3 Achievements', and '3 Completed Activities'. Below this, there is a section for 'Discussion Topics (0)' with a message 'You have not added any discussion topics yet.' Underneath is an 'Activities' section with two tabs: 'View by Status' and 'View by Goal'. Below the tabs, there is a section for 'High (2)' with a dropdown arrow. Under this, there is a list item: 'Develop PMGM tutorial video on goals' with a red bar on the left, the status 'High', and the date 'Updated today'. Below this is another list item: 'Revise script for PMGM goals video' with a red bar on the left, the status 'High', and the date 'Updated today'. The second list item is circled in black.

### 13. Click the "Edit" button to edit the activity information.

Activity Details

PMGM goals video

On: 10/22 Attachments: View Attachments (0) Feedback Received: No

Created: 10/22 Goal: Linked Goals (1)

te.

Post

Script is almost completed.

The screenshot shows the 'Activity Details' page for 'PMGM goals video'. At the top right, there is a search bar and several icons. Below the activity name, there are buttons for 'Request Feedback' and 'Delete'. The 'Edit' button is circled in red. The activity details show it was created on 10/22, has 0 attachments, and 1 linked goal. The status is 'Script is almost completed.'.

### 14. If you change the Status to "Complete," you can create an achievement by clicking the box "Mark as an achievement."

Activities / Meeting / Activity Data

Revise script for PMGM

Status: High Created On: Oct 21, 2022 Last Updated: Oct 23, 2022

Updates

Post an activity update.

LL LACI L TALLEY: Script Updated today

Edit Activity

Activity Name:\*

Revise script for PMGM goals video

Status:

Complete

☒ Mark as an achievement

Linked Goals

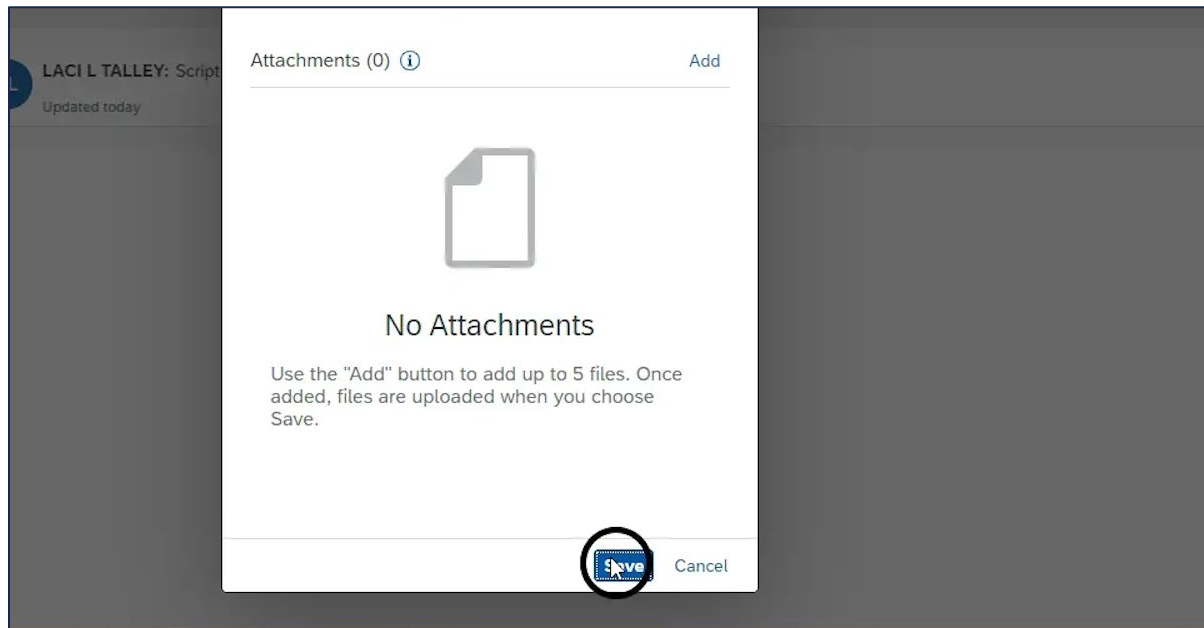
Performance Goal Create Goal

Create 17 PMGM video tutorials for statewide use 12...

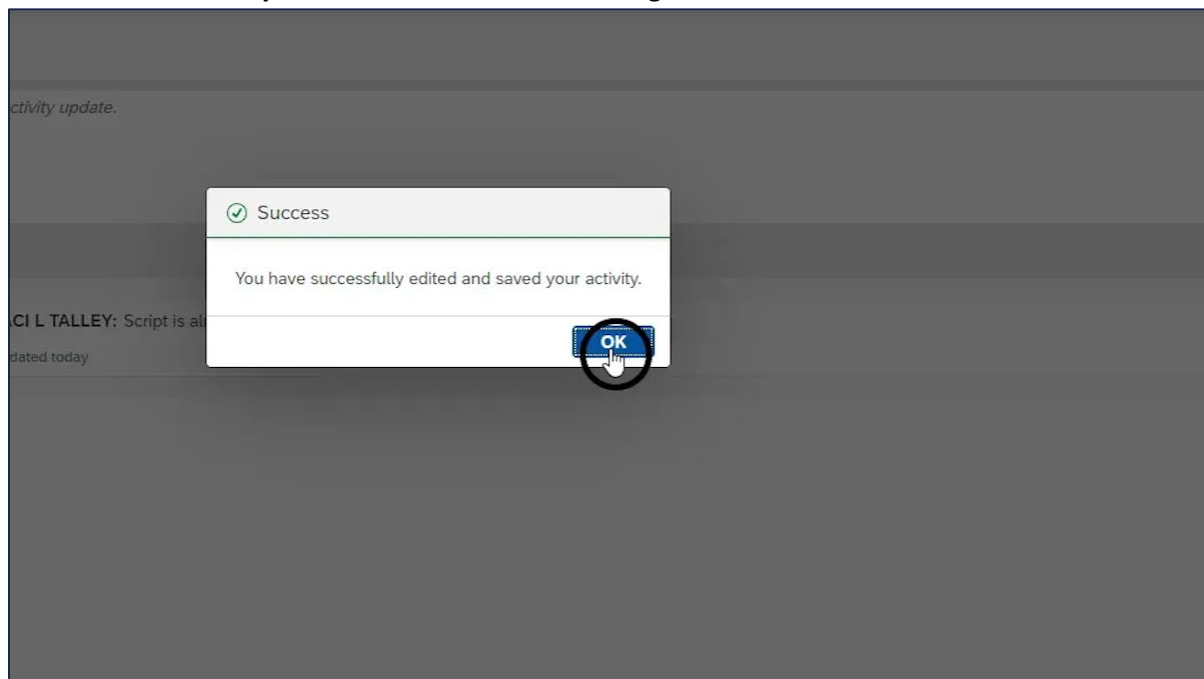
Attachments (0) Add

The screenshot shows the 'Edit Activity' dialog box. The 'Mark as an achievement' checkbox is checked and circled in red. The activity name is 'Revise script for PMGM goals video'. The status is 'Complete'. There is one linked goal: 'Create 17 PMGM video tutorials for statewide use 12...'. There are no attachments.

**15. Click "Save" to save your activity edits.**



**16. Click "OK" when you see the confirmation message.**



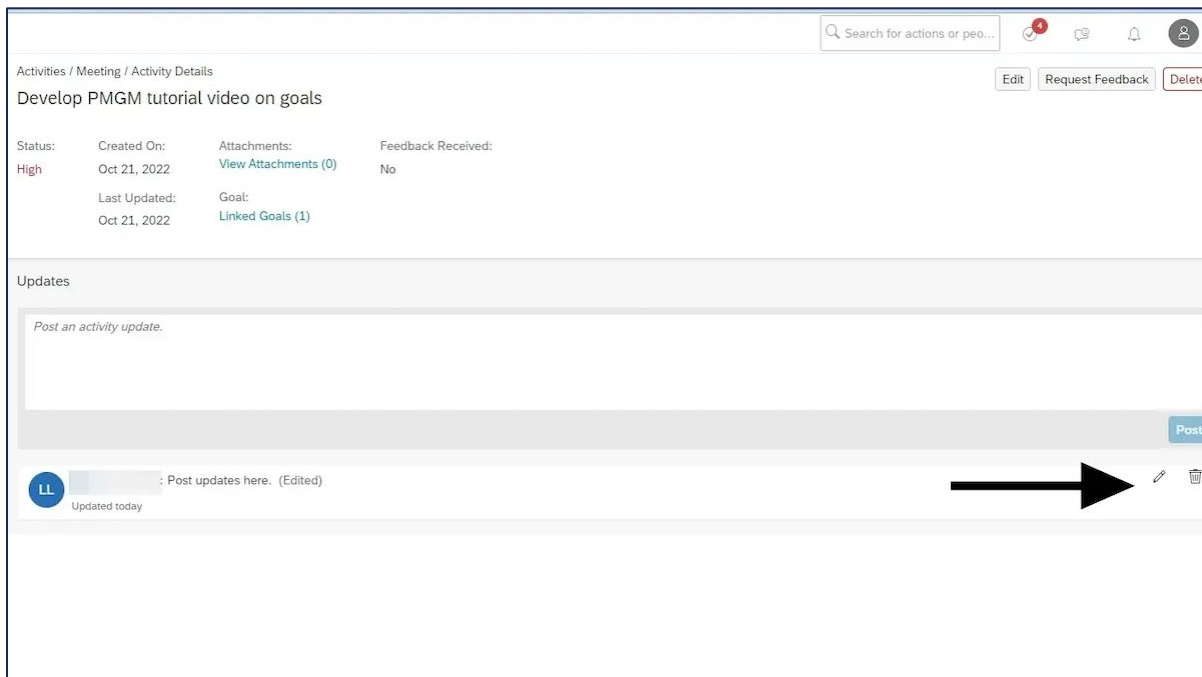
## 17. Type and post any activity updates.

NOTE: These updates remain in the "Activity Details" section. These comments do not appear on the Goal Plan or form.



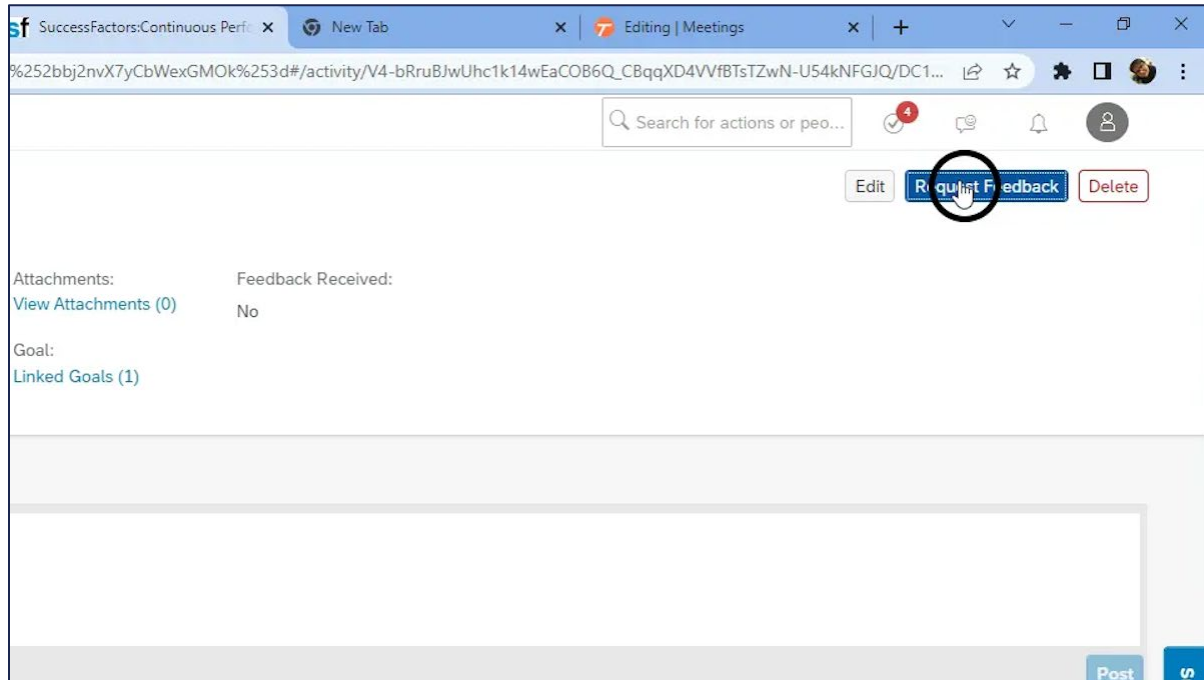
A screenshot of a web form for posting activity updates. The form consists of a large, empty text area for typing. To the right of the text area, there is a circular button with a hand icon and the word "Post". Below this button is a vertical blue button labeled "Support".

## 18. Posted updates can be edited or deleted.



A screenshot of the "Activity Details" page for the activity "Develop PMGM tutorial video on goals". The page shows the activity status as "High", created on "Oct 21, 2022", and last updated on "Oct 21, 2022". It also shows "View Attachments (0)" and "Linked Goals (1)". Below the activity details, there is a section titled "Updates" with a text area for posting updates. A "Post" button is located to the right of the text area. Below the "Post" button, there is a list of posted updates. The first update is by user "LL" and says "Post updates here. (Edited)". To the right of this update, there is a black arrow pointing to the right, and icons for editing (pencil) and deleting (trash can).

19. Click the "Request Feedback," if you would like to request feedback.



## USING ACHIEVEMENTS

**WHAT:** Creating achievements is a continuous performance tool available for supervisors and employees to track accomplishments and progress related to established performance goals.

**WHEN:** Create an achievement when an employee has completed a performance target or goal.

**WHY:** Celebrating employee success has been shown to increase employee engagement, build trust, boost employee confidence, and increase productivity.

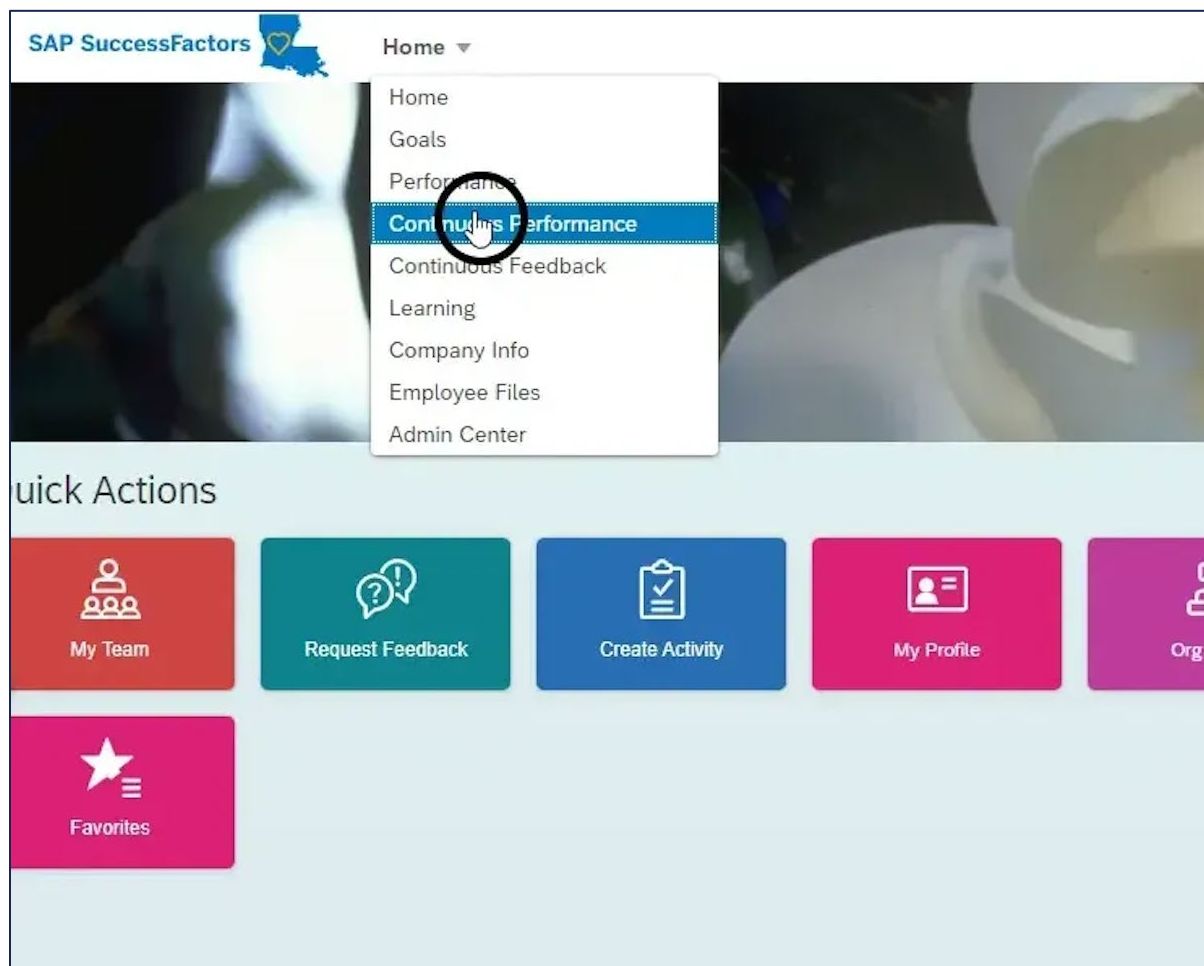
### SF NOTES:

- *Achievements, when connected to goals, will display in the CPM form for easier tracking and performance evaluation.*
- *You can add an achievement for one of your employees or for yourself. Your employees can also add their own achievements.*



## ADDING AN ACHIEVEMENT

### 1. Select “Continuous Performance” from the Home menu.



**2. Select the correct individual.**

SAP SuccessFactors Continuous Performance

Active Channels

- GD HR ASSISTANT DIVISION ADMINISTRATOR
- AM ANNE MARIE DAVIS HR CONSULTANT SPECIALIST
- NB HR CONSULTANT SPECIALIST
- TM HUMAN RESOURCES CONSULTANT A
- VQ HUMAN RESOURCES CONSULTANT C

My Activities with

View by Status View by Goal

Status High (0) Status Medium (0)

**3. Click "Achievements."**

Search for actions or peo...

Create Activity Start Meeting Achievements

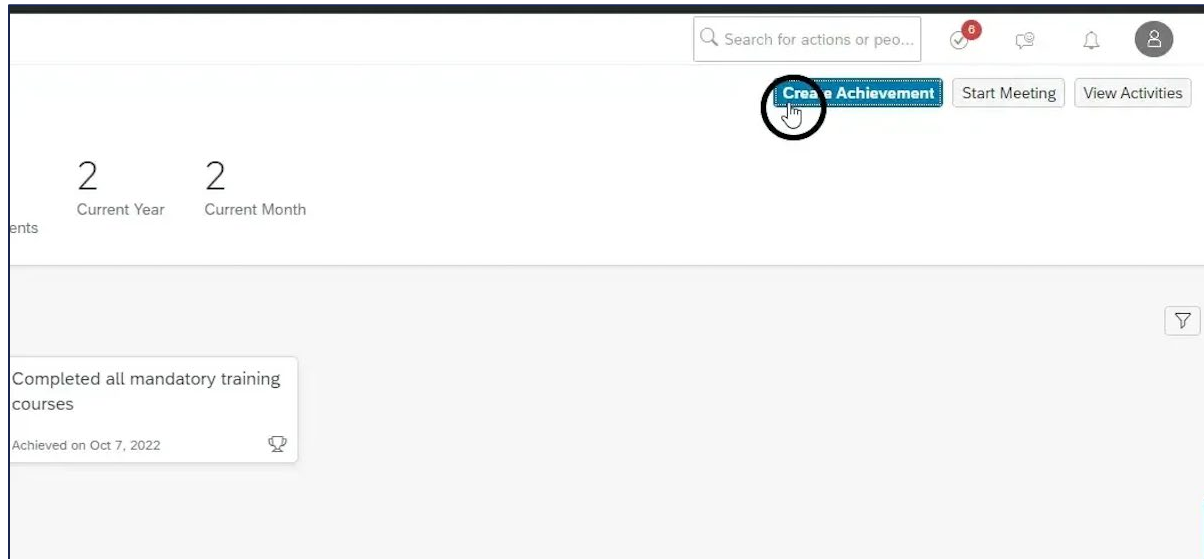
Status Low (0) Status Complete (2) Status Cancelled (0)

Completed all mandatory training courses  
Updated today  
Complete

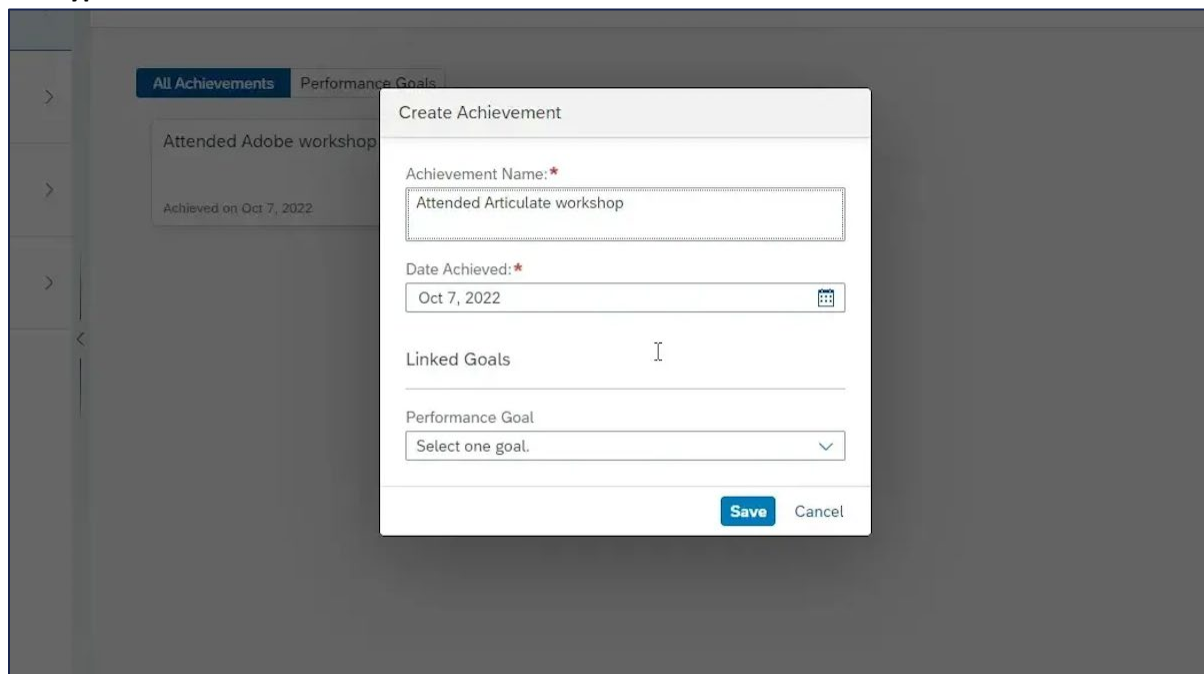
Attended Adobe workshop  
Updated today  
Complete

Support

#### 4. Click "Create Achievement."



#### 5. Type in the Achievement Name and select the correct date.



## 6. Use drop down menu to connect Achievement to a goal from the goal plan.

NOTE: Achievements, when connected to goals, will display in the CPM form for easier tracking and performance evaluation



**Create Achievement**

Achievement Name: \*  
Attended Articulate workshop

Date Achieved: \*  
Oct 7, 2022

Linked Goals

Performance Goal  
Select one goal. ▼

- Select one goal.
- Other duties as assigned
- Conduct a training needs assessment and skills gap an...
- Complete mandatory training courses
- Attend 3 seminars, conferences and/or trainings during...

## 7. Click "Save."

**Create Achievement**

Achievement Name: \*  
Attended Articulate workshop

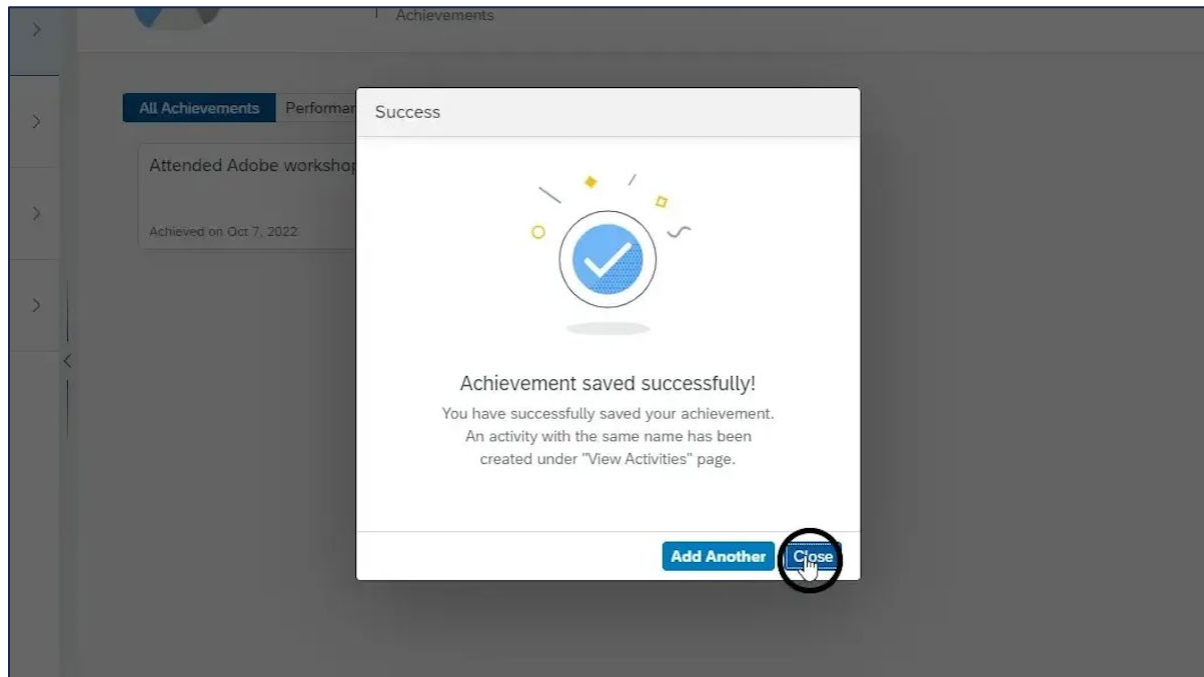
Date Achieved: \*  
Oct 7, 2022

Linked Goals

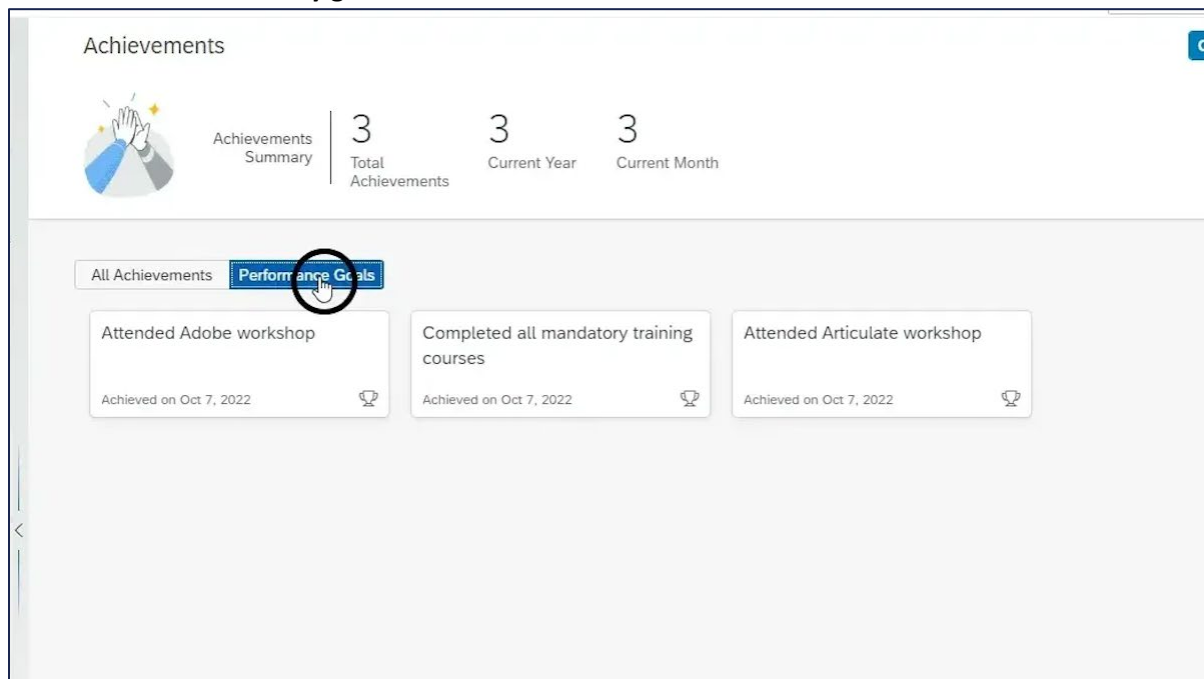
Performance Goal  
Attend 3 seminars, conferences and/or trainings durin... ▼

Save Cancel

8. After you get the save message, click “Close” to exit or “Add Another” to create another Achievement.



9. After the window closes, you will see the individual's total achievements. Click “Performance Goals” to view achievements by goals.



**10. Here the individual's achievements are displayed by the goal to which they were linked.**

All Achievements

Performance Goals

✓ Other duties as assigned (0)

No items available.

✓ Conduct a training needs assessment and skills gap analysis by (date) (0)

No items available.

✓ Complete mandatory training courses (1)

Completed all mandatory training courses

Achieved on Oct 7, 2022

✓ Attend 3 seminars, conferences and/or trainings during (time frame) to keep professional skills up to date (2)

Attended Adobe workshop

Achieved on Oct 7, 2022

Attended Articulate workshop

Achieved on Oct 7, 2022

## PERFORMANCE IMPROVEMENT TOOL

**WHAT:** The purpose of this form is to establish communication and document areas that require further performance development to reach expectations or achieve stated goals in the performance plan. This form may also reflect an agreement between supervisor and employee on the plan for development and may also be used as supporting documentation to the overall performance evaluation to show the steps taken to enhance performance.

**WHEN:** Use this form when your employee is performing below expectations and needs a structured process to develop and/or improve specific areas of performance.

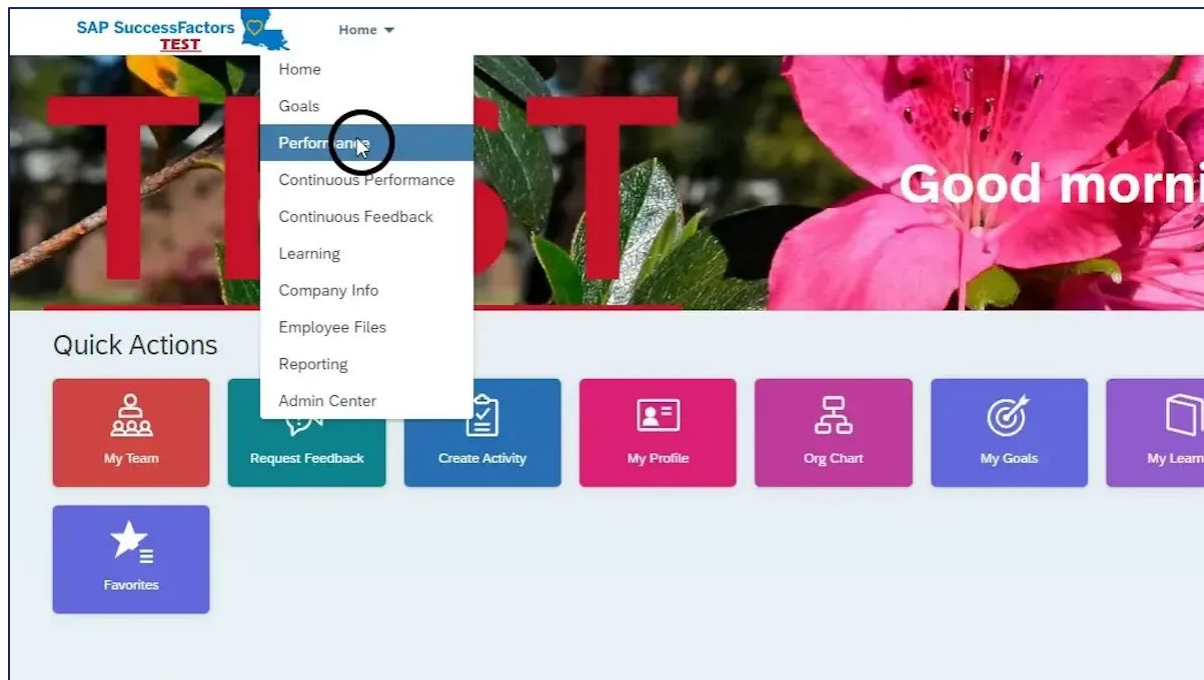
**WHY:** This form adds structure and consistency to performance improvement. Also, this form helps the supervisor and the employee stay engaged in the and complete the process by requiring interim check ins.

**SF NOTES:** *This form must be launched by the Agency Administrator or HR Representative. HR must review the form before the supervisor has a 1:1 discussion with employee.*



## COMPLETING PERFORMANCE IMPROVEMENT FORM

1. Once your Agency Administrator has launched the form, it will be available in your inbox. Click on "Performance" from the Home menu.



## 2. Click on the form to open it.

SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

### My Forms

All Forms

In Progress

**Inbox**

En Route

Completed

Items per page 10 ▾ |<< < Page 1 of 1 > >> Showing 1–4 of 4 ☐ All ☒ My Direct Reports

[Create New Form](#) Mass Route Options ▾ [GO](#)

> Search



Display Options

☒ Form Title ☒ Employee ☒ Step ☒ Date Assigned ☒ Step Due Date ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ L

Form Title	Employee	Step
2023 Performance Planning and Evaluation Form 70/30 for	VACKENTASCHRE Q BELL 美国	Initial Planning: Su
2023 Performance Planning and Evaluation Form 70/30 for	NATHAN BARNABA 美国	Initial Planning: Su
2023 Performance Planning and Evaluation Form 70/30 for	TAYLOR M BUTLER 美国	Initial Planning: Su
Performance Improvement Tool for	ANNE-MARIE DAVIS 美国	Supervisor Comple


## 3. Change dates, if necessary.



Performance Improvement Tool for


  3

Route Map Introduction Employee Information Review Dates Supervisor Comments

### Review Dates


Originator: 

Review Period: 11/15/2022  - 11/14/2023 


Due Date: 12/14/2023 

### Supervisor Comments

\* Areas of Performance for Development




\* Provide specific examples



#### 4. Type in the "Areas of Performance for Development."

NOTE: This field is required. The form will not route if it is empty.



Performance Improvement Tool for ANNE-MARIE DAVIS

Route Map Introduction Employee Information Review Dates Supervisor Comments

**Review Dates**

Originator: [Redacted]

Review Period: 11/15/2022 - 11/14/2023

Due Date: 12/14/2023

**Supervisor Comments**

\* Areas of Performance for Development


[Rich text editor with a large 'I' cursor icon]

\* Provide specific examples

[Rich text editor with a large 'I' cursor icon]

#### 5. "Provide specific examples" by typing in this box.

NOTE: This field is required. The form will not route if it is empty.



**Review Dates**

Originator: [Redacted]

Review Period: 11/15/2022 - 11/14/2023

Due Date: 12/14/2023

**Supervisor Comments**

\* Areas of Performance for Development

Add areas for performance development.

\* Provide specific examples

[Rich text editor with a large 'I' cursor icon]

\* Action Plan

[Rich text editor with a large 'I' cursor icon]

**6. Add the "Action Plan" created to help employee develop performance in areas listed above.**

NOTE: This field is required. The form will not route if it is empty.



Supervisor Comments

\* Areas of Performance for Development

Add areas for performance development.

\* Provide specific examples

Add specific examples.

\* Action Plan

I

**7. Click "Save and Send to Next Step."**

NOTE: The form will be routed to HR for review.

Support

Cancel Save and Close Save and Send Next Step

**8. Confirm your selection.**

Assessment

Employee Review Comments

5 Interim Check In #1

6 Interim Check In #2

7 Interim Check In #3

Cancel & Return to Form

**Save and Send Next Step**

Support

## DOCUMENTING INITIAL 1:1 DISCUSSION

1. After HR reviews and approves the form, you will need to arrange a one-on-one meeting with your employee.

SAP SuccessFactors

Performance

Reviews Team Overview

Back to: Inbox

Performance Improvement Tool for

1 Incomplete Items

Route Map Introduction Employee Information Review Dates Supervisor Comments 1:1 Discussion with Employee

Route Map

Assessment

1 Supervisor Completes Form

2 HR Review

3 1:1 Discussion with Employee

4 Employee Review Comments

Introduction

The purpose of this form is to establish communication and document areas that require further performance development to reach expectations or achieve stated goals in and may also be used as supporting documentation to the overall performance evaluation to show the steps taken to enhance performance.

Click here [Placeholder Text]

2. After you meet with your employee, document the date of the 1:1 Discussion.

Employee Information	
Last Name	First Name
Job Title	Personnel Area Desc
Org Unit Description	
<div> <div> <div>Originator:</div> <div>Review Period: 11/15/2022 - 11/14/2023</div> <div>Due Date: 12/14/2023</div> </div> </div>	
Supervisor Comments	
<b>Areas of Performance for Development</b> Provide specific examples Action Plan	Add areas for performance development. Add specific examples. Create action plan.
1:1 Discussion with Employee	
* Date	MM/DD/YYYY

### 3. Click "Confirm Discussion and Send to Next Step."

[illegible]

#### 4. Confirm your selection.

The screenshot displays the 'Confirm your selection' step in the SAP SuccessFactors Employee Review process. At the top, a progress bar shows four steps: '4 Employee Review Comments', '5 Interim Check In #1', '6 Interim Check In #2', and '7 Interim Check In #3'. Step 4 is currently active. Below the progress bar is a large, empty text area for comments. On the right side, there is a vertical 'Support' button. At the bottom right, there are two buttons: 'Cancel & Return to Form' and 'Confirm Discussion and Send to Next Step'. The 'Confirm Discussion and Send to Next Step' button is highlighted with a dashed border and a hand cursor icon, indicating it is the next action to take.

## INITIAL EMPLOYEE COMMENTS

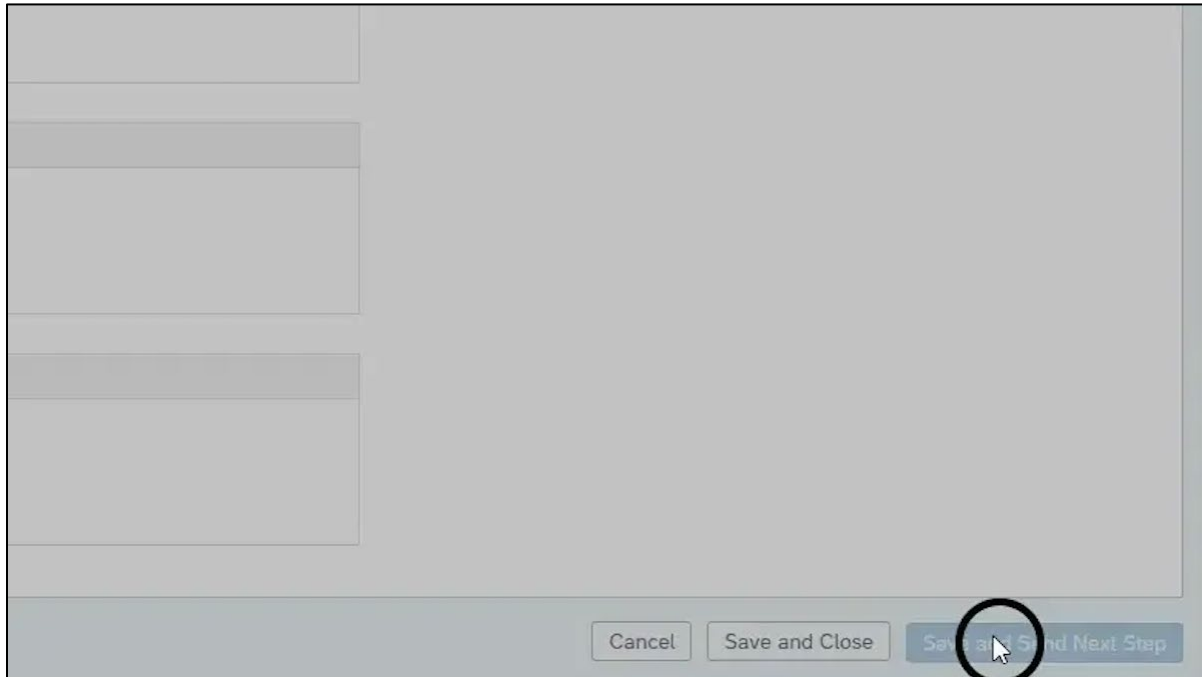
1. The employee has an opportunity to comment on the Performance Improvement Tool. First, the employee accesses the form either by the "For You Today" or in their inbox.



NOTE: This is optional for the employee.

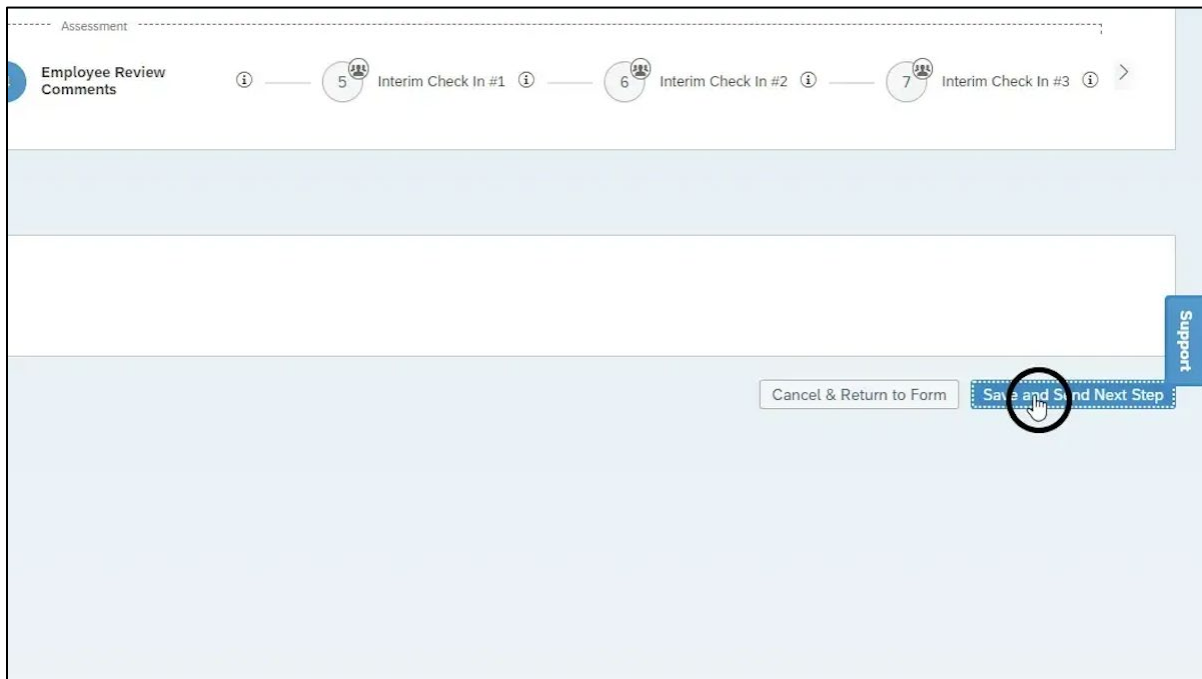
2. The employee can type in "Notable Obstacles," "Questions about expectations," and "Additional Goals."

**3. The employee must then "Save and Send Next Step."**



A screenshot of a software interface showing a form with several empty input fields on the left and a large empty text area on the right. At the bottom right, there are three buttons: 'Cancel', 'Save and Close', and 'Save and Send Next Step'. The 'Save and Send Next Step' button is circled in black, and a mouse cursor is pointing at it.

**4. The employee must confirm the selection.**



A screenshot of a software interface showing a form with a progress bar at the top. The progress bar has four steps: 'Employee Review Comments' (selected), 'Interim Check In #1', 'Interim Check In #2', and 'Interim Check In #3'. Below the progress bar, there are two large empty text areas. At the bottom right, there are two buttons: 'Cancel & Return to Form' and 'Save and Send Next Step'. The 'Save and Send Next Step' button is circled in black, and a mouse cursor is pointing at it. A 'Support' button is visible on the right side of the form.

## INTERIM DISCUSSIONS

## SF NOTES:

- This form requires 3 interim check ins.
- You can have the employee comment before or after each interim session. Having the employee comment before you meet will allow you to review their comments and use that to set the agenda for the interim meeting.



**1. For all interim discussions, you must document the date and add "Supervisor Comments on Performance Progress."**

1:1 Discussion with Employee

Date 11/14/2022

Employee Comments

Notable Obstacles  
Questions about expectations  
Additional Goals

Interim Check In #1

\* Date MM/DD/YYYY

Plan Status This is how I am doing on my plan.

Employee Comments on Performance Progress I am getting much better at my time management.

\* Supervisor Comments on Performance Progress

B I U | | | | | Size | A-Z |

**2. Click "Save and Send Next Step."**

Cancel Save and Close Save and Send Next Step

## EMPLOYEE INTERIM DISCUSSION COMMENTS

Employees must add comments in the "Plan Status" and "Employee Comments on Performance Progress" fields. Then "Save and Close."



Interim Check In #1

Date

\* Plan Status

**B** *I* U | S | A-Z

This is how I am doing on my plan.

\* Employee Comments on Performance Progress

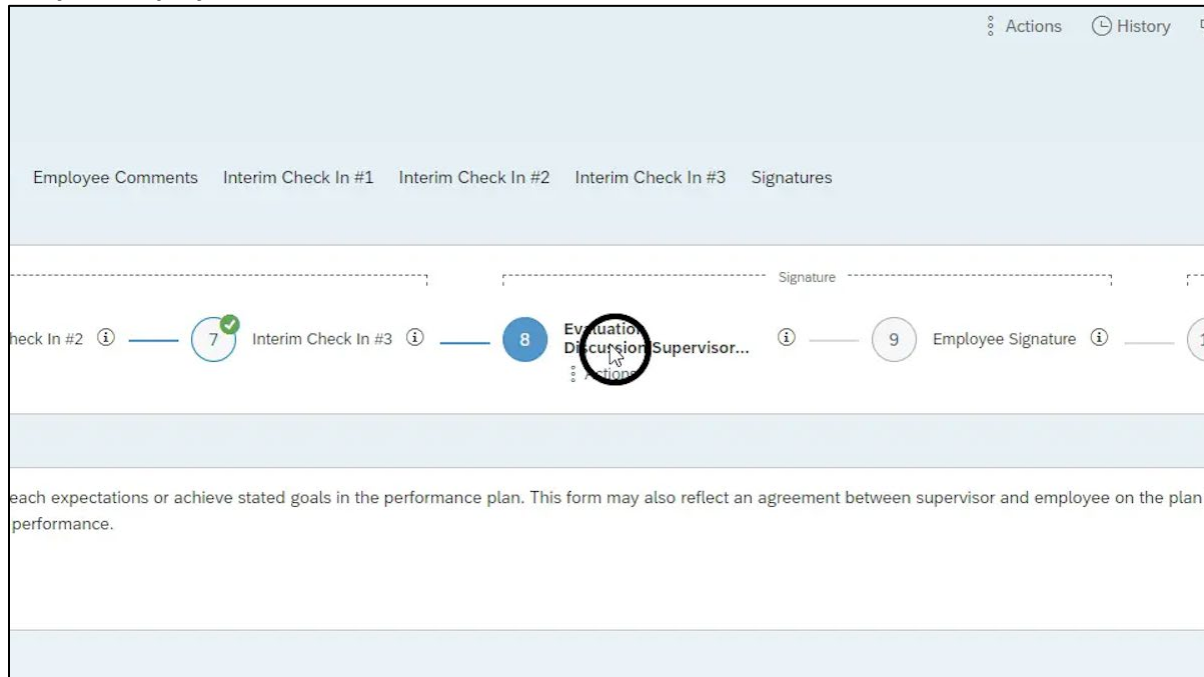
**B** *I* U | S | A-Z

I am getting much better at my time management.

Supervisor Comments on Performance Progress

## FINAL PERFORMANCE IMPROVEMENT EVALUATION DISCUSSION

1. At the end of the performance improvement period, you should conduct and evaluation discussion with your employee.

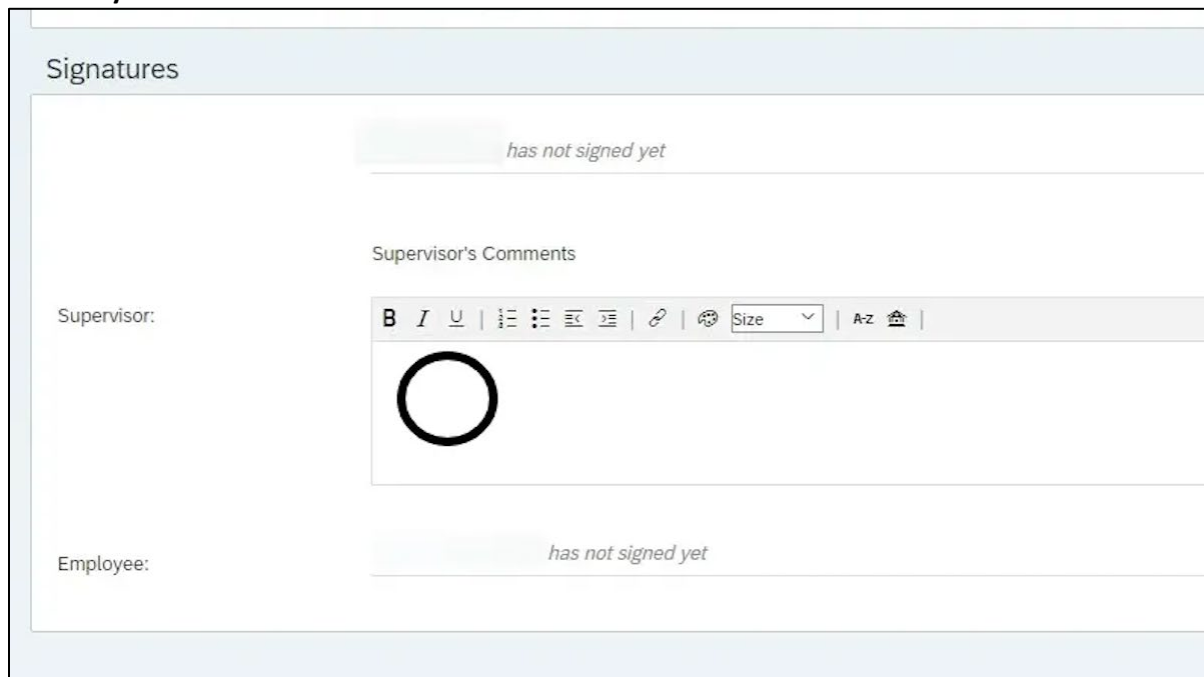


Employee Comments Interim Check In #1 Interim Check In #2 Interim Check In #3 Signatures

check In #2 7 Interim Check In #3 8 Evaluation Discussion Supervisor... 9 Employee Signature 1

each expectations or achieve stated goals in the performance plan. This form may also reflect an agreement between supervisor and employee on the plan performance.

2. Add your overall comments to the form.



Signatures

has not signed yet

Supervisor's Comments

Supervisor:

Employee:

has not signed yet

### 3. Click "Sign" to sign your form. The form is then forwarded to your employee.

NOTE: You cannot type your name here.

The screenshot shows a form titled "Performance Improvement Tool" with a progress bar at the top indicating steps: "Discussion/Supervisor...", "Employee Signature", and "Completed". The main content area is mostly blank, with a note on the left stating "Form is also sent to your En Route folder." On the right side, there is a "Support" button. At the bottom right, there is a "Cancel & Return to Form" button and a "Sign" button, which is circled with a black line and a hand cursor icon, indicating it is the next step to click.

## EMPLOYEE SIGNATURE ON PERFORMANCE IMPROVEMENT TOOL

### 1. The employee navigates to the form either from the "For You Today" tile or in their inbox.

The screenshot shows the SAP SuccessFactors dashboard. At the top, there is a "Quick Actions" section with several buttons: "Request Feedback", "Create Activity", "My Profile", "Org Chart", "My Goals", "Report Center", "View Tile Reports", and "Mobile App". Below this is the "For You Today" section, which contains a tile titled "Review Your Performance". This tile includes the text "Performance Improvement Tool", "Employee Signature", and "No due date". At the bottom of this tile, there is a "Go to Form" button, which is circled with a black line and a hand cursor icon, indicating it is the next step to click.

**2. The employee may type their comments in this field.**

Employee Comments on Performance Progress  
Supervisor Comments on Performance Progress      Comments in this field.

Signatures

Supervisor:  11/14/2022

Employee's Comments

Employee: 

Waiting for hcm41preview.sapsf.com...

**3. The employee signs the form by clicking "Sign" at the bottom.**

NOTE: The employee cannot type in their name.

Cancel      Save and Close      **Sign**

**4. The employee must confirm their signature for the form to be completed.**

The screenshot displays a progress bar at the top of a form with four steps: 7 Interim Check In #3 (completed), 8 Evaluation Discussion/Supervisor... (completed), 9 Employee Signature (current step), and 10 Completed. The main content area is a large, empty light blue rectangle. In the bottom right corner, there is a button labeled "Cancel & Return to Form" and a "Sign" button, which is circled in black. A vertical "Support" button is located on the right edge of the form area.

## CONTINUOUS FEEDBACK

**WHAT:** Employees and supervisors can request feedback on any topic from their management team, peers, or any other employee. Requests can even be made to individuals in different agencies.

**WHEN:** Use this tool when seeking feedback on your or your employee's performance on a work project or task.

**WHY:** Feedback on job performance is critical in developing job skills, competencies, and professional capabilities. It provides employees and their supervisors detailed insight into what they do well and where there are opportunities for growth and improvement. Feedback is one way to receive insights about ourselves which might otherwise remain unknown.

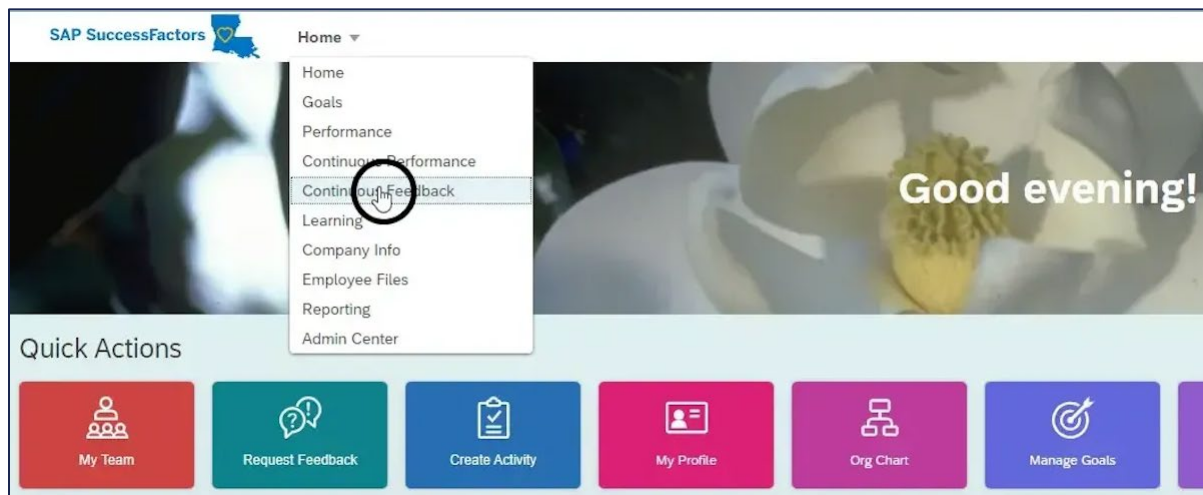
### SF NOTES:

- Supervisors may request feedback from anyone on behalf of an employee. If a supervisor requests feedback about an employee, both the supervisor and the employee receives the response.
- If an employee requests feedback from another person, the supervisor does not automatically receive that response.
- Requests can be declined by users.
- Feedback can only be deleted if it was requested by the employee.
- Feedback can only be deleted by the Agency Administrator.

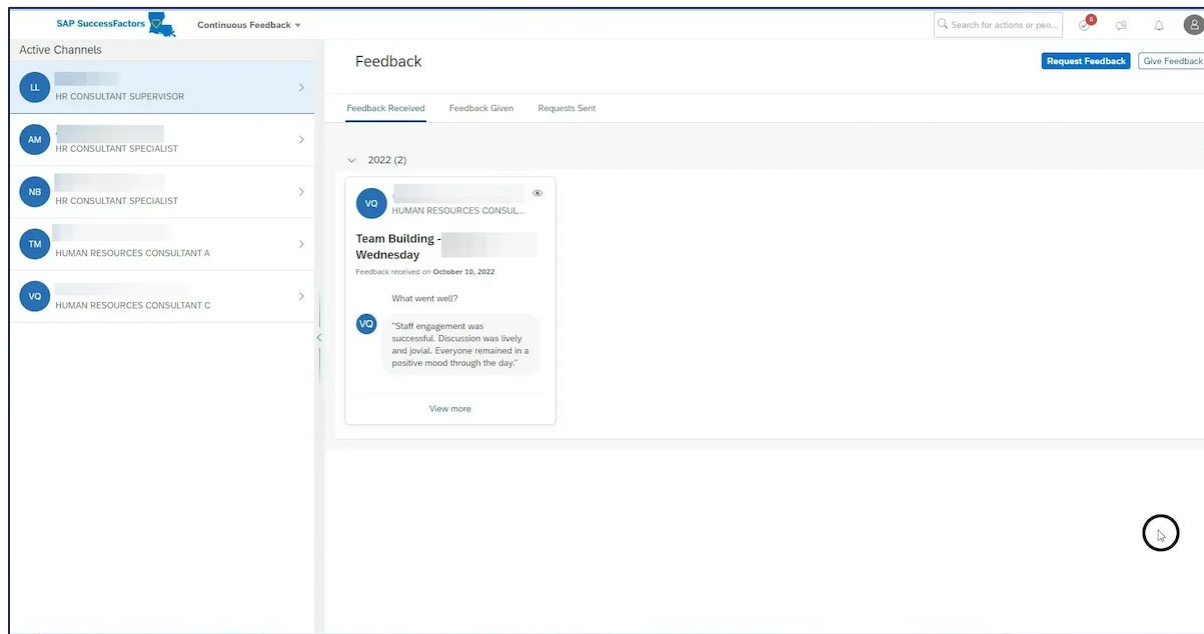


## NAVIGATING CONTINUOUS FEEDBACK

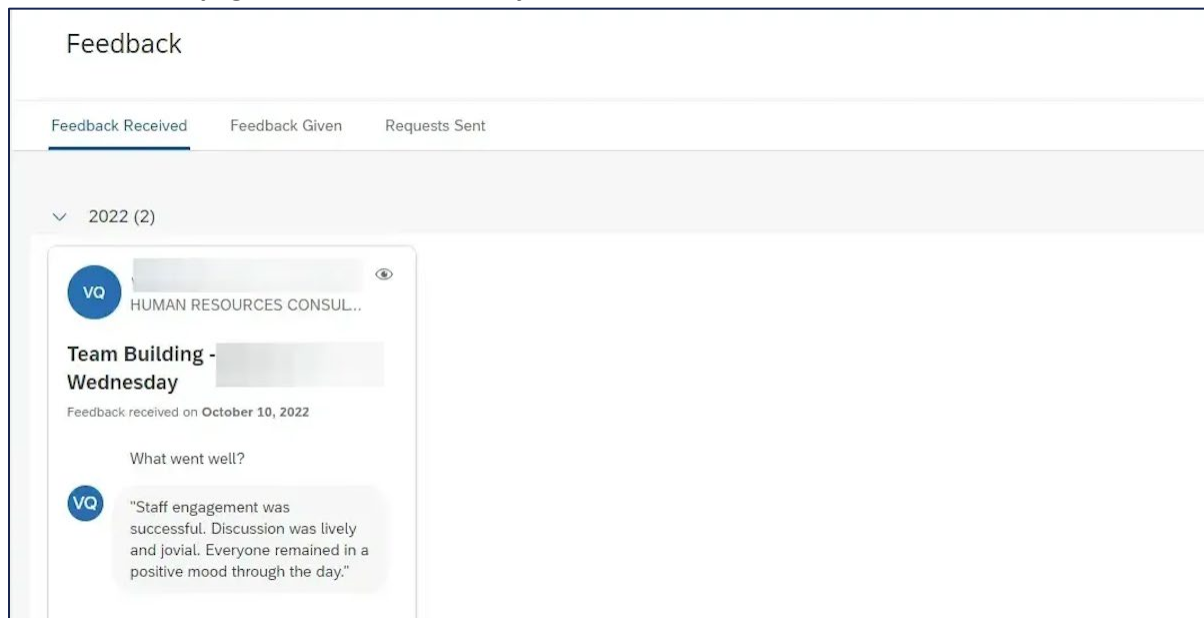
### 1. Click on "Continuous Feedback" in the Home menu.



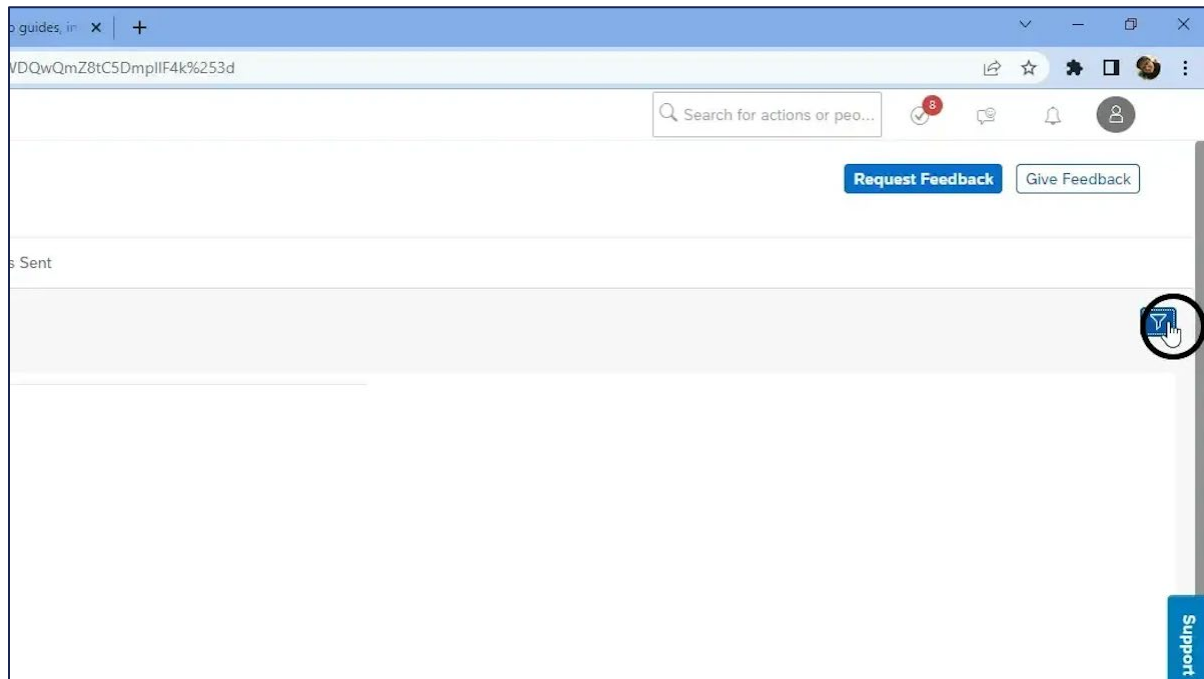
2. This is the default view of your Feedback page. In the column on the left, you are listed at the top, followed by your direct reports.



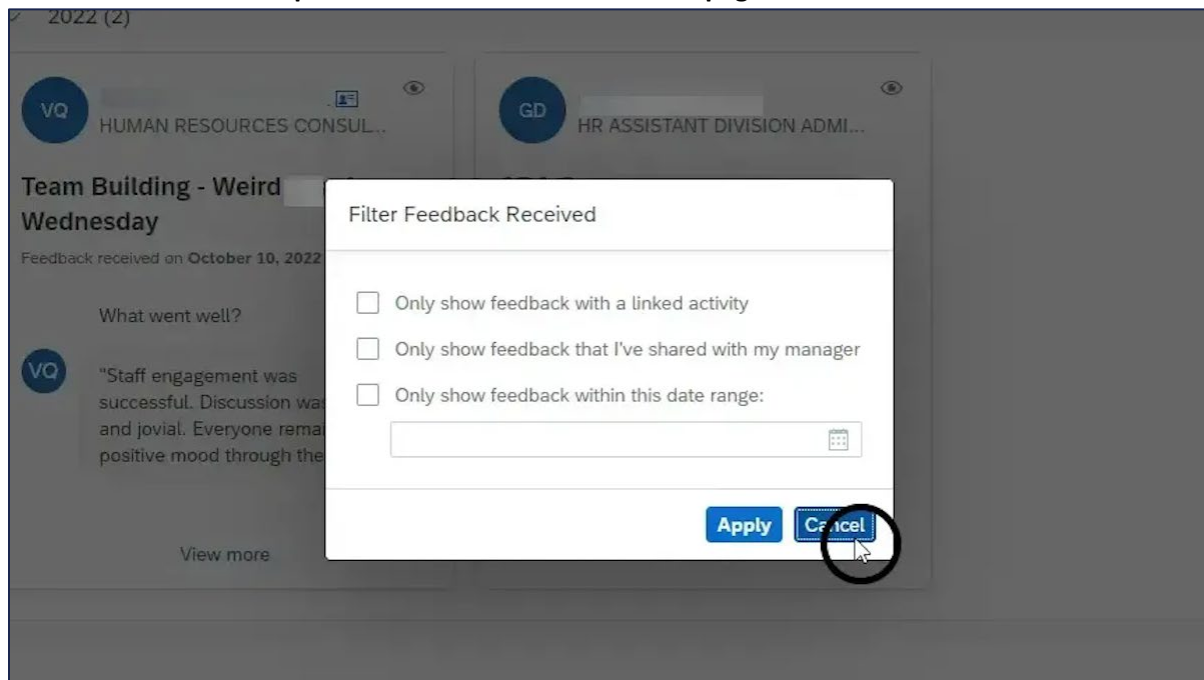
3. The default page shows the feedback you have received.



#### 4. Click the Filter icon to filter your feedback.

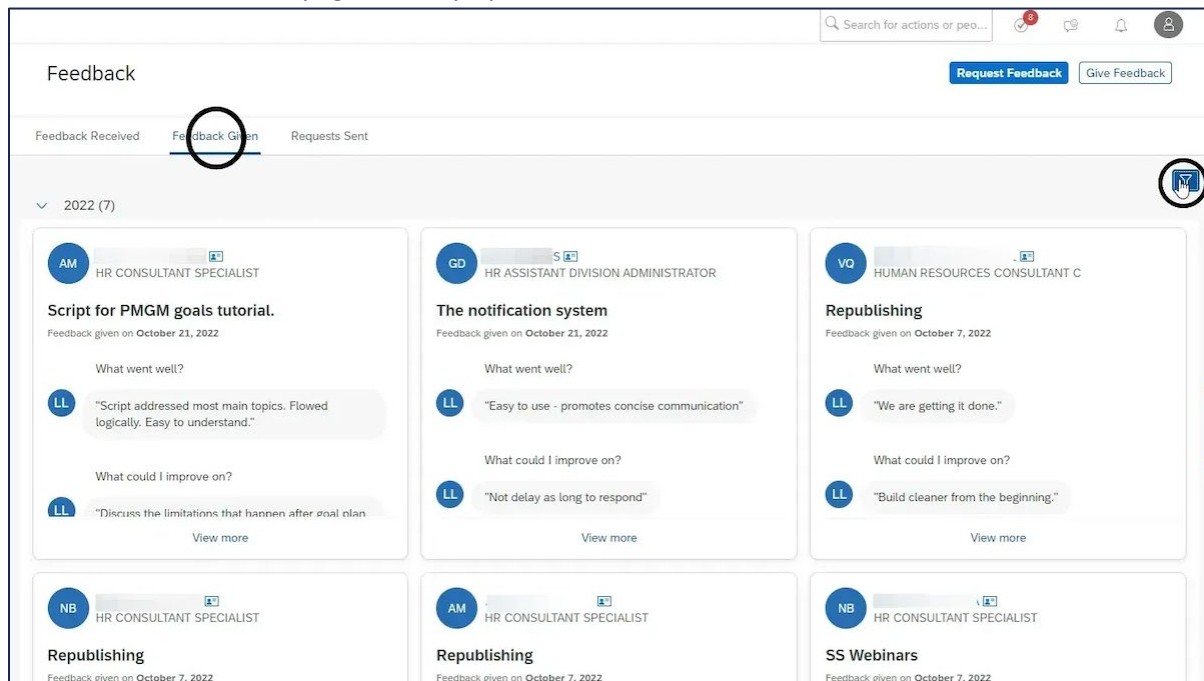


#### 5. Here are the filter options for the Feedback Received page.



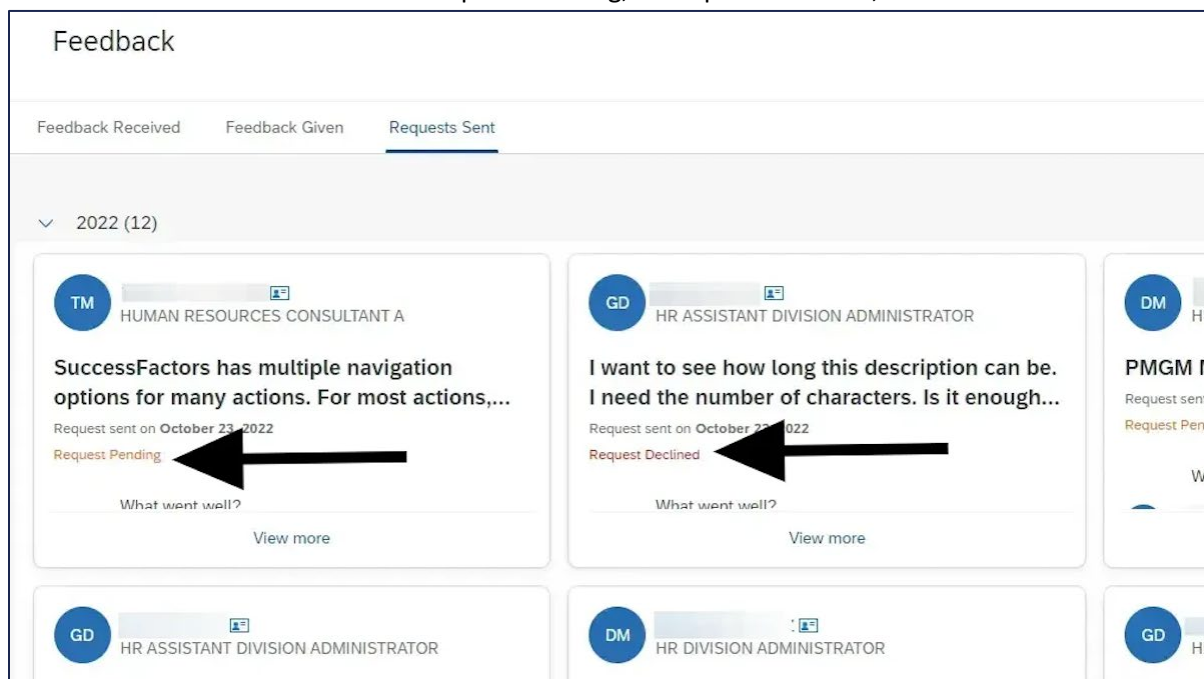
6. Click "Feedback Given" to see all feedback you have given to others.

NOTE: You can filter this page but only by dates.

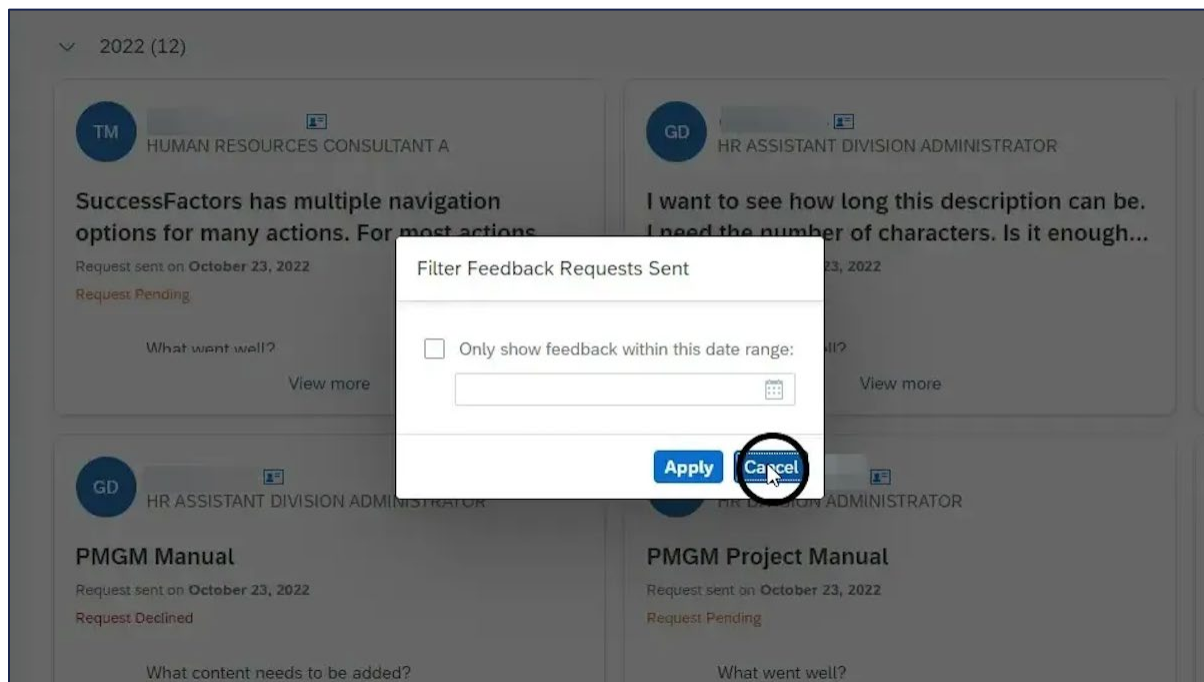


7. Click "Requests Sent" to see the status of your Feedback Requests.

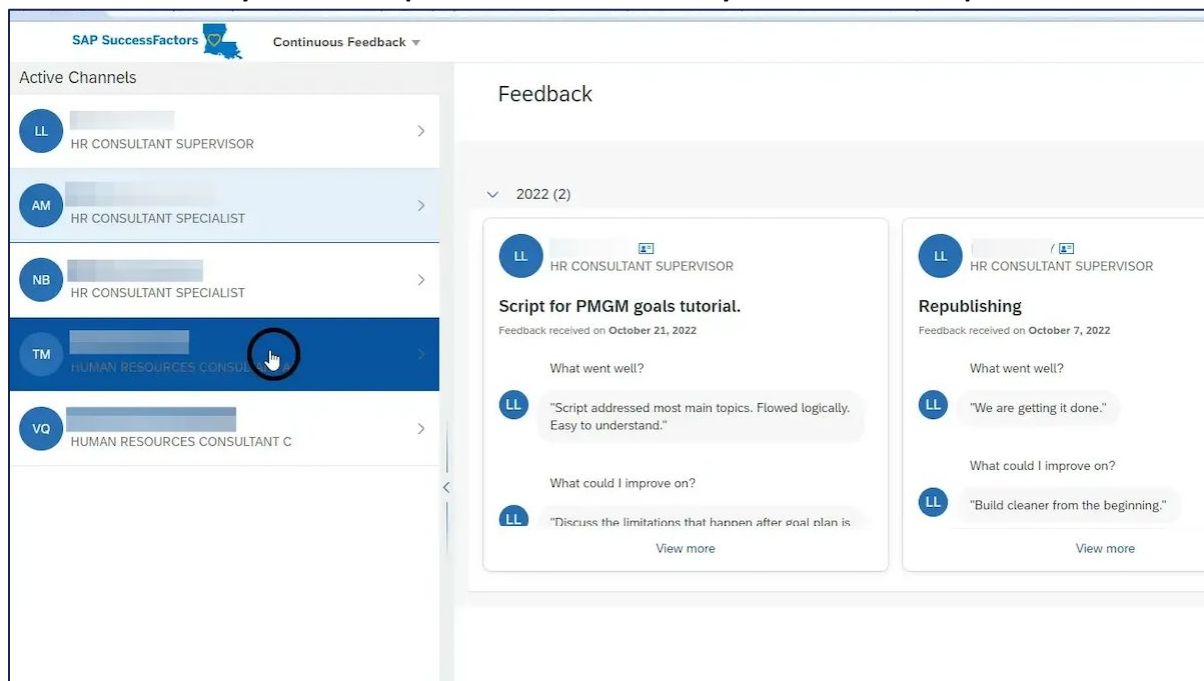
NOTE: There are three statuses: 1. Request Pending, 2. Request Declined, and 3. Feedback Received.



8. Like the "Feedback Given" page, "Requests Sent" can only be filtered by dates.



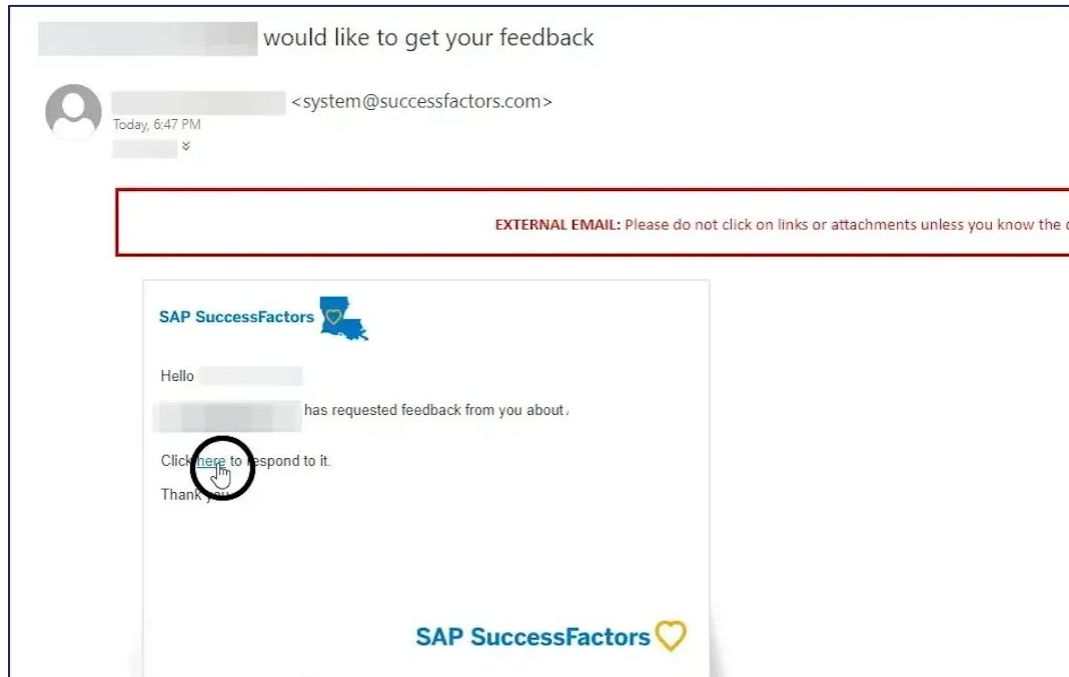
9. Click on one of your direct reports to see the feedback you have sent or requested for them.



## RESPONDING TO FEEDBACK REQUESTS

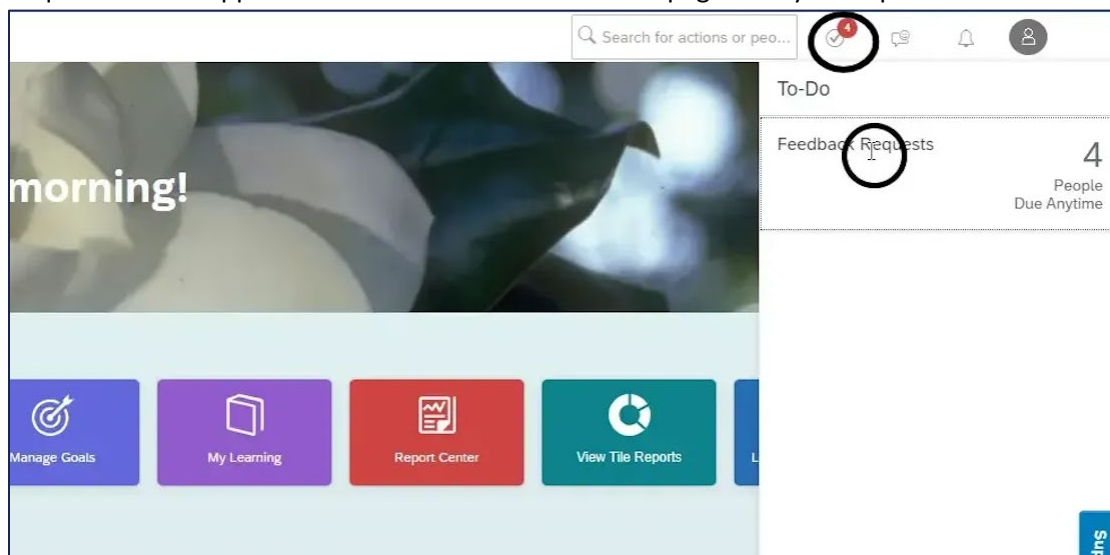
1. When someone requests feedback from you, you will receive an email with the request.

NOTE: You may click the link in the email to respond.

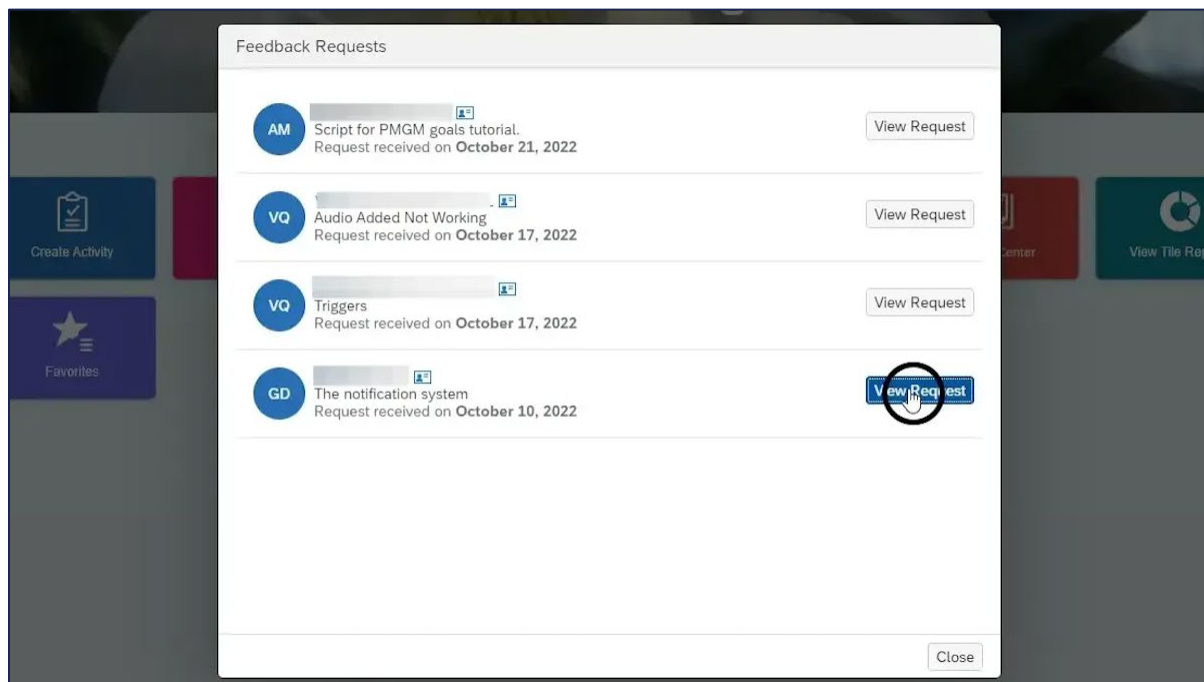


2. Feedback Requests are shown in your To-Do List. Click on the To-Do List icon to open your list. Then, click on "Feedback Requests" to view your requests.

NOTE: This is the only way to view and to respond to Feedback Requests in SuccessFactors. Requests do not appear on the "Continuous Feedback" page until you respond.

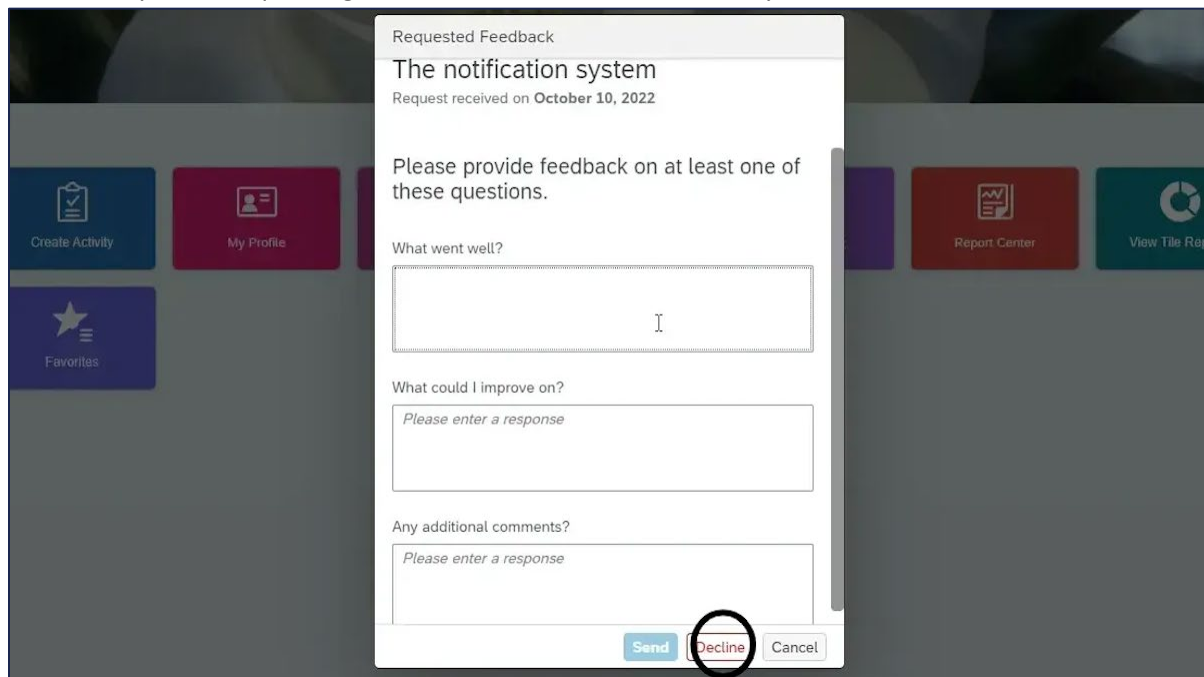


3. Click on "View Request" to open.

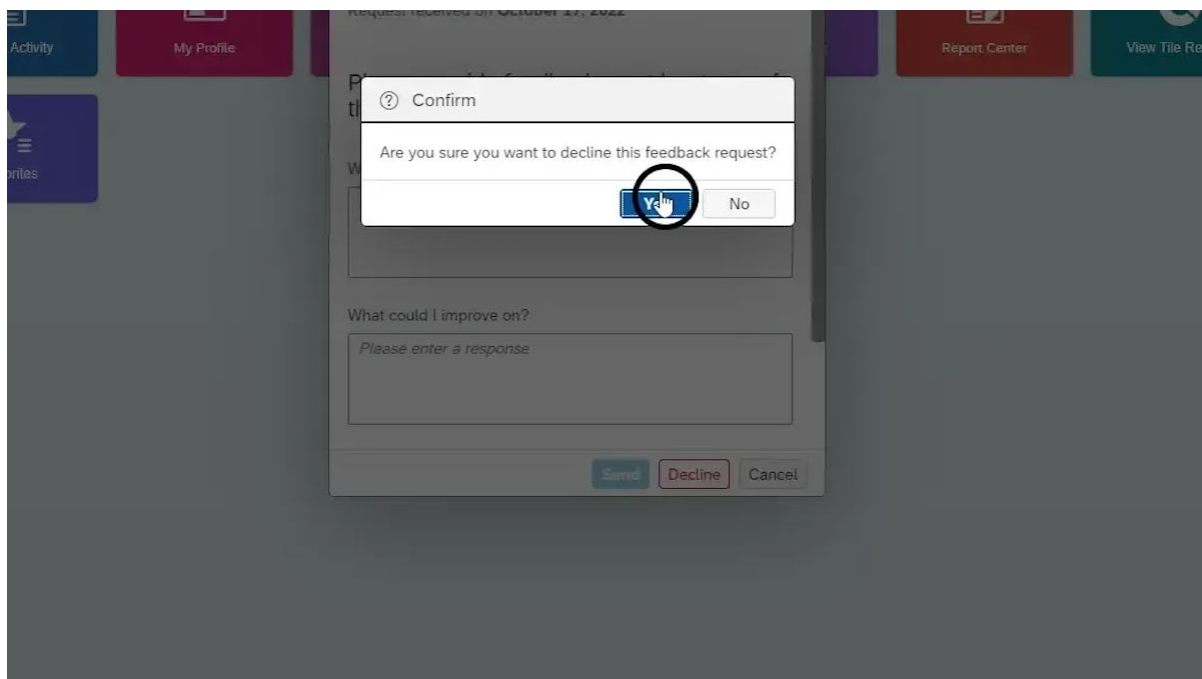


**4. Option 1: Click on "Decline," if you do not want to provide feedback.**

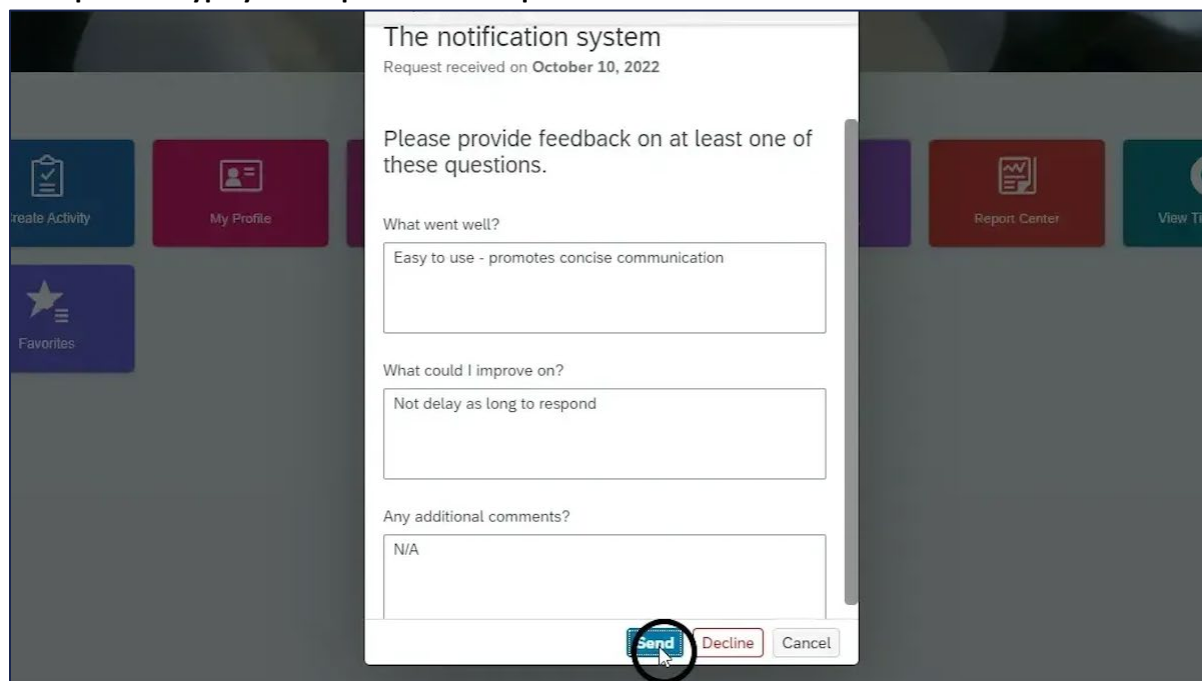
NOTE: The person requesting the feedback will be notified that you declined.



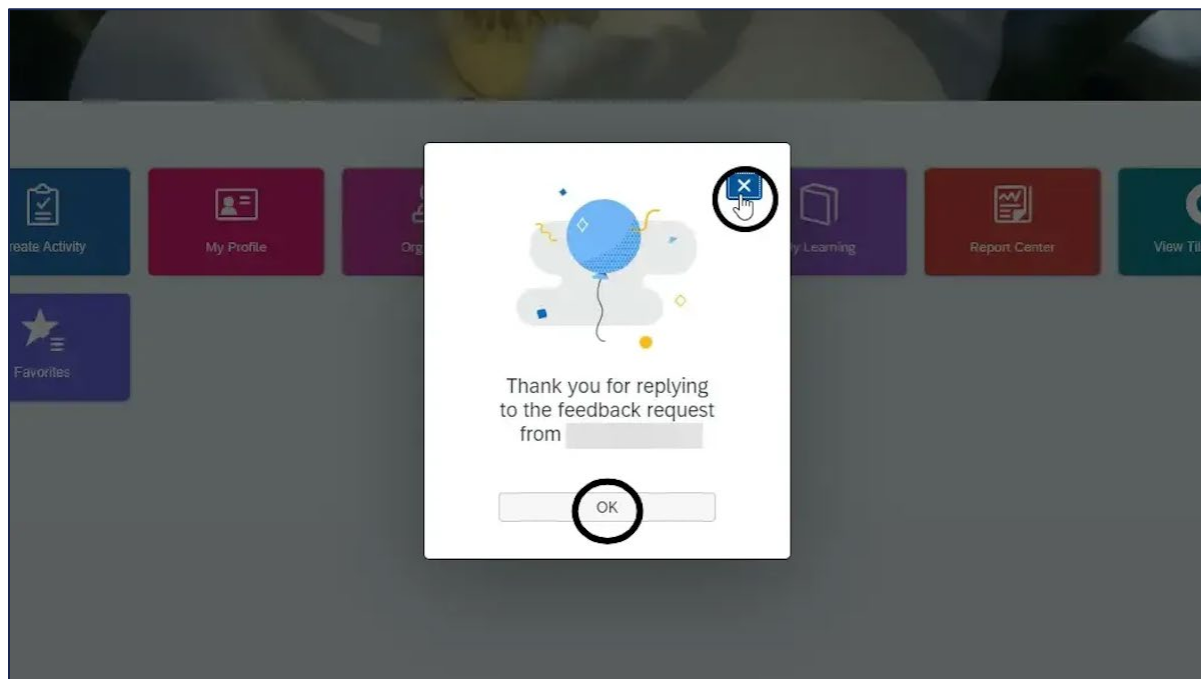
**5. If you select decline, you will see a confirmation request. Click "Yes" to decline the request.**



**6. Option 2: Type your responses to the questions and then click "Send."**

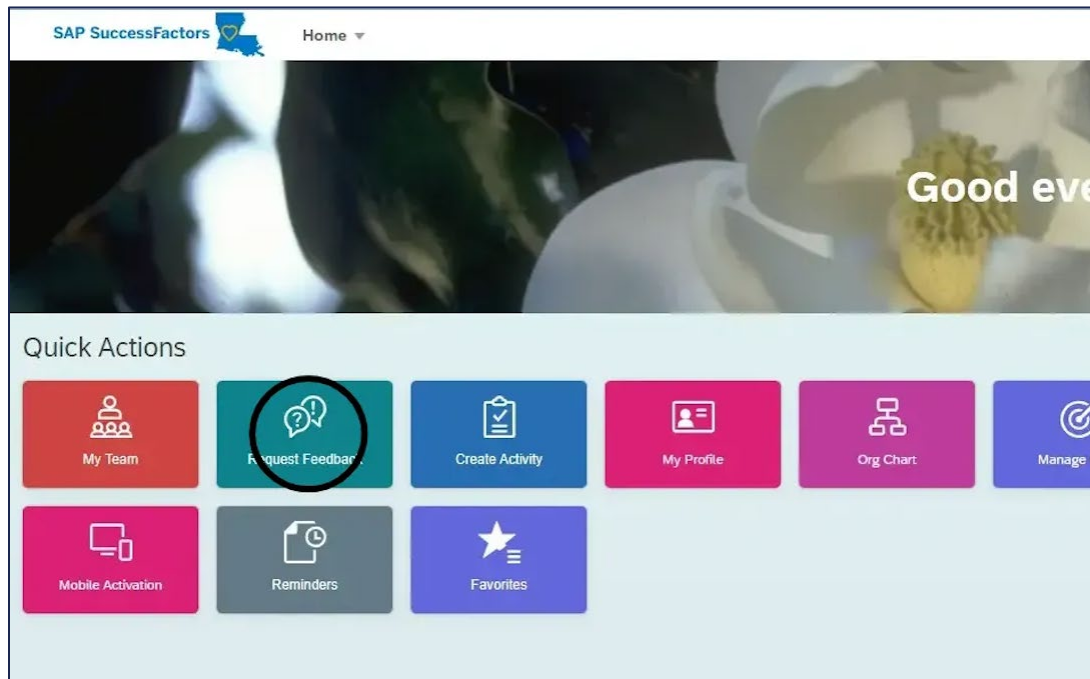


7. Click either "OK" or the "X" button to close this screen.

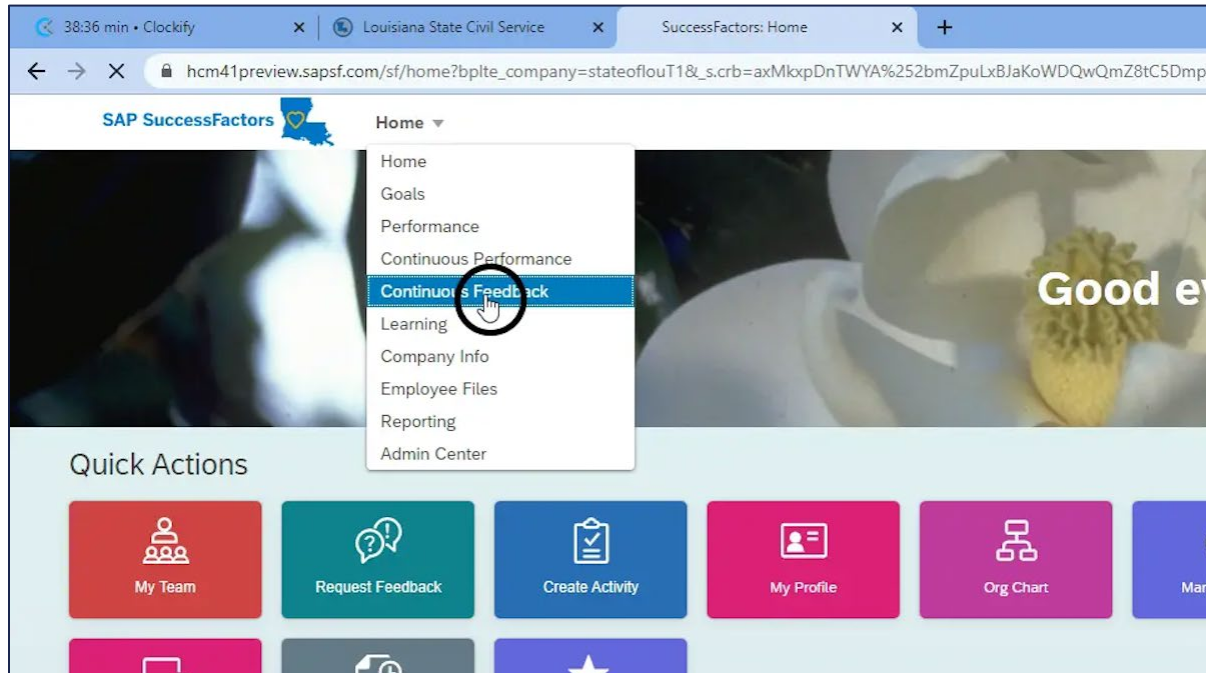


## REQUESTING FEEDBACK

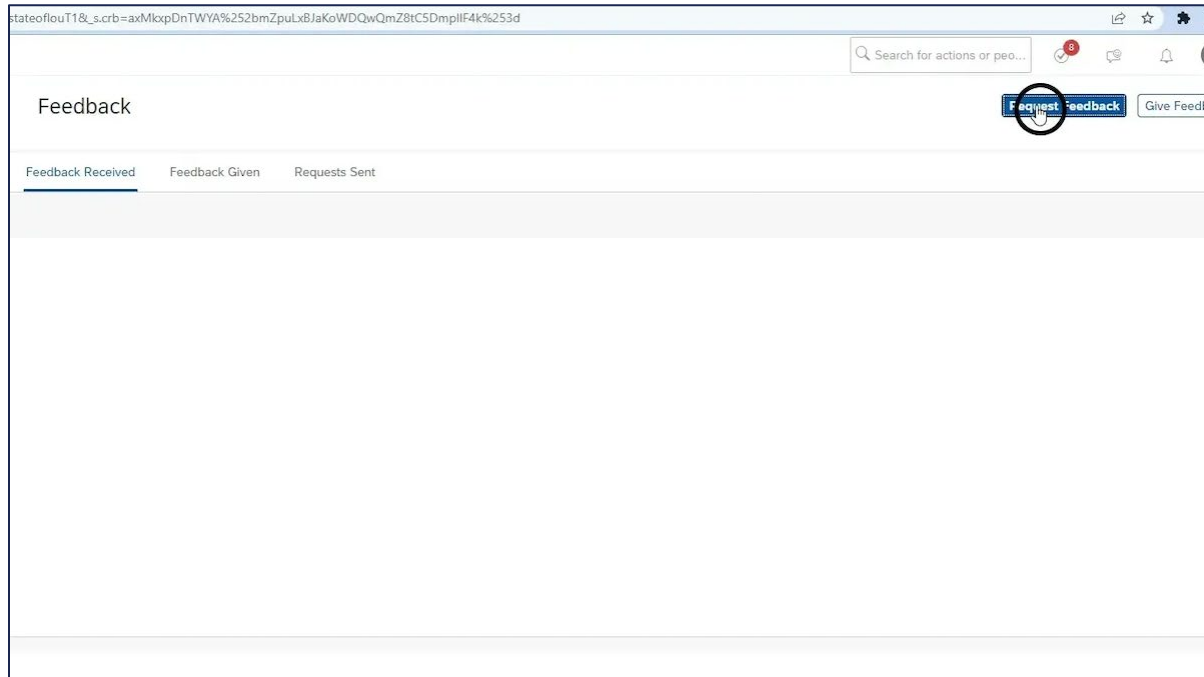
### 1. Option 1: Click on the "Request Feedback" Quick Actions tile.



### 2. Option 2: Click on "Continuous Feedback" in the Home menu.

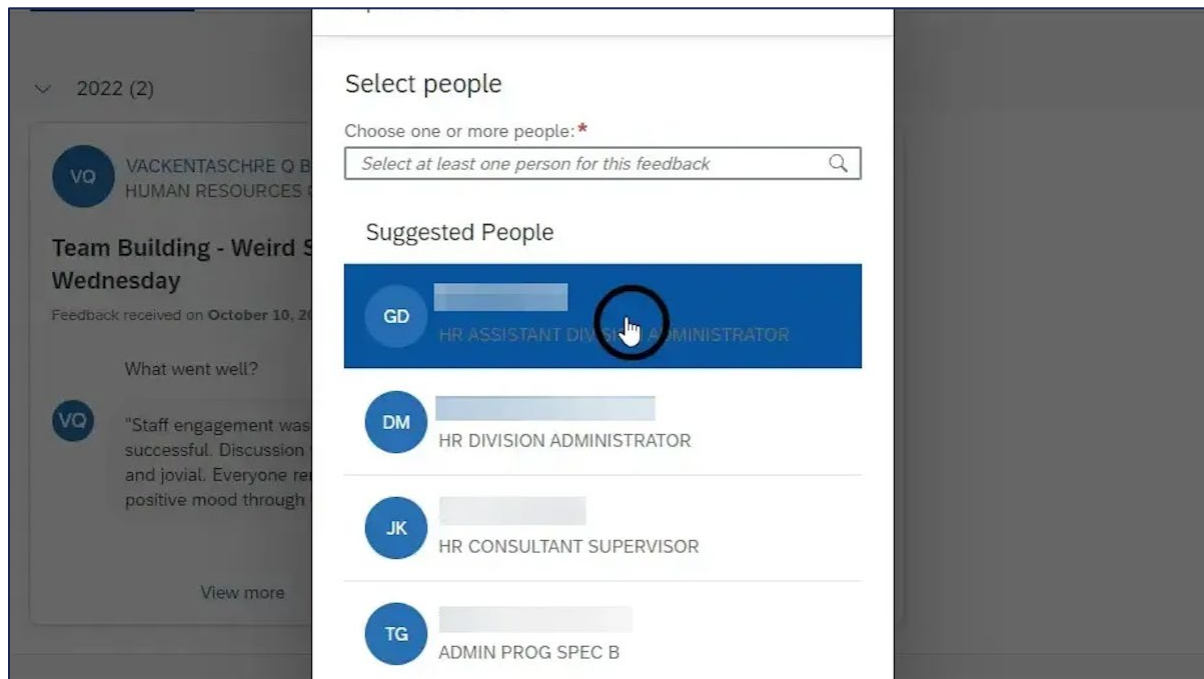


### 3. From the Feedback page, click the "Request Feedback" button.



### 4. Select or search for the people from whom you want to request feedback.

NOTE: This field is required. You can select multiple people. You may request feedback from anyone in the system, regardless of your relationship.



## 5. Enter the Feedback Topic.

NOTE: This field is required. You have a 500-character limit in this field. Be specific about the topic and the type of feedback you are requesting.



GD HR ASSISTANT DIVISION ADMINISTRATOR

Enter a topic and at least one question.

Feedback Topic: \*

Question 1:  
What went well?

Question 2:  
What could I improve on?

Question 3:  
Any additional comments?

## 6. Click on the pencil icon to edit the feedback questions, if desired.

GD HR ASSISTANT DIVISION ADMINISTRATOR

Enter a topic and at least one question.

Feedback Topic: \*

Question 1:

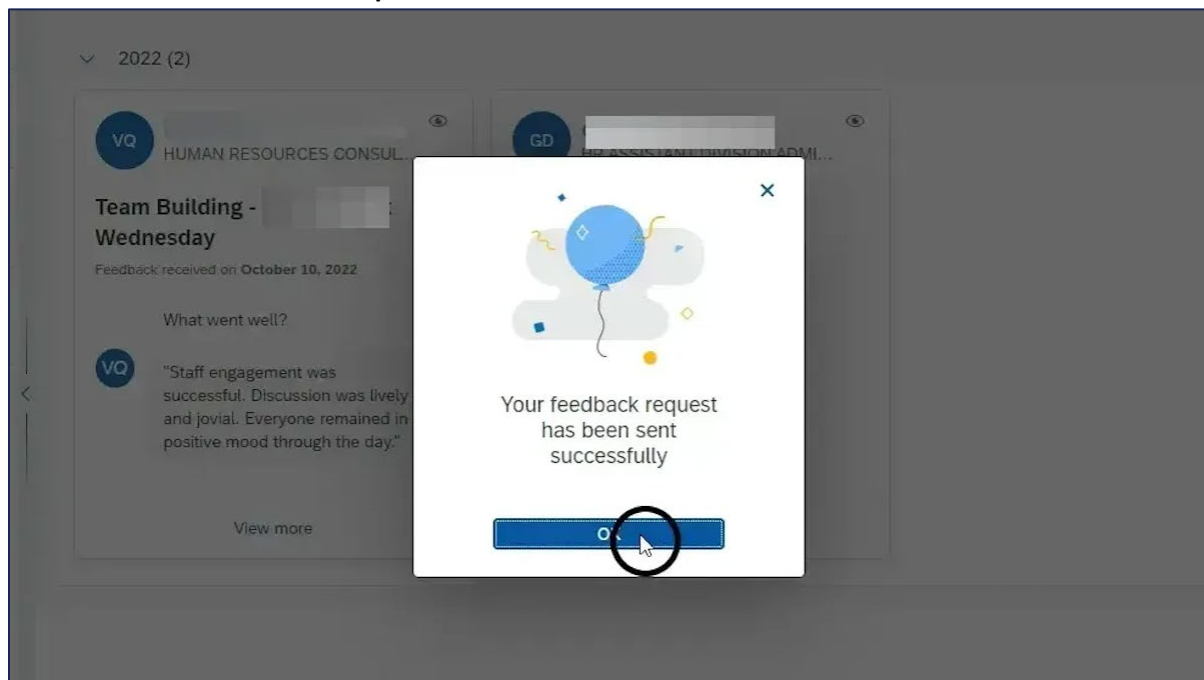
Question 2:  
What could I improve on?

Question 3:  
Any additional comments?

7. Click "Send" to send your feedback request.

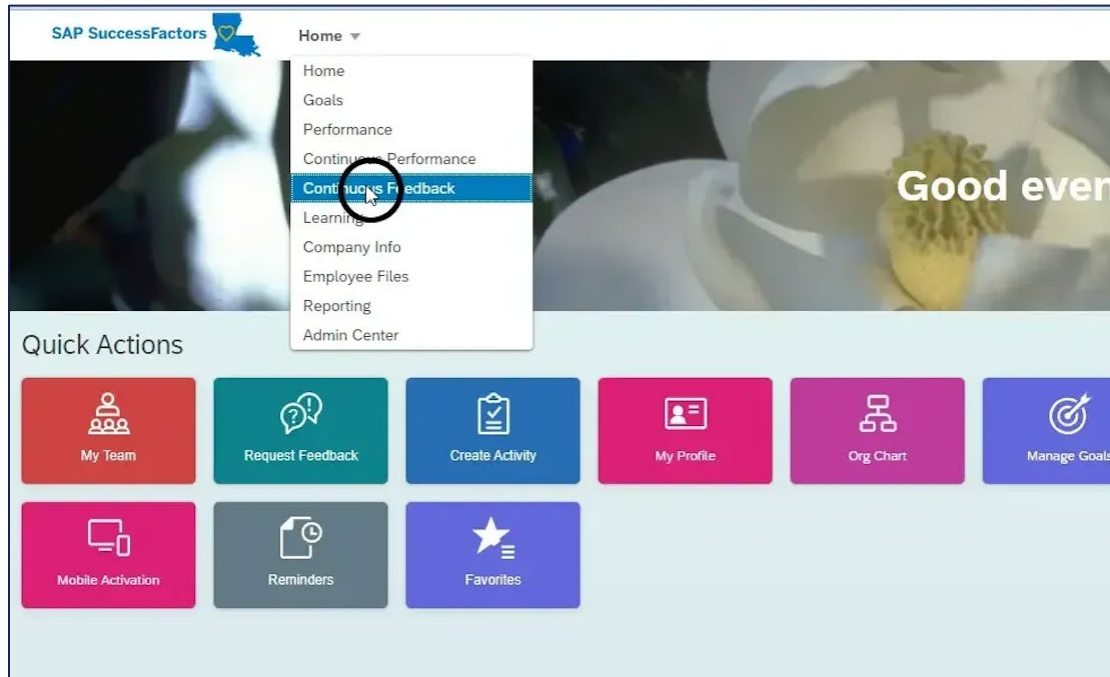
The screenshot shows a feedback form titled "Team Building - Weird S Wednesday" with feedback received on October 10, 2022. The form includes a "What went well?" section with a quote: "Staff engagement was successful. Discussion was lively and jovial. Everyone remained in positive mood through the day." Below this, there is a "Choose one or more people:" section with a search bar and two selected recipients: "DM HR DIVISION ADMINISTRATOR" and "GD HR ASSISTANT DIVISION ADMINISTRATOR". The "Feedback Topic:" is "PMGM Manual". There are three questions: "Question 1: What content needs to be added?" (checked), "Question 2: What could I improve on?" (checked), and "Question 3: Any additional comments?" (unchecked). At the bottom right, the "Send" button is circled in black, and a "Cancel" button is next to it.

8. Click "OK" on feedback request confirmation.

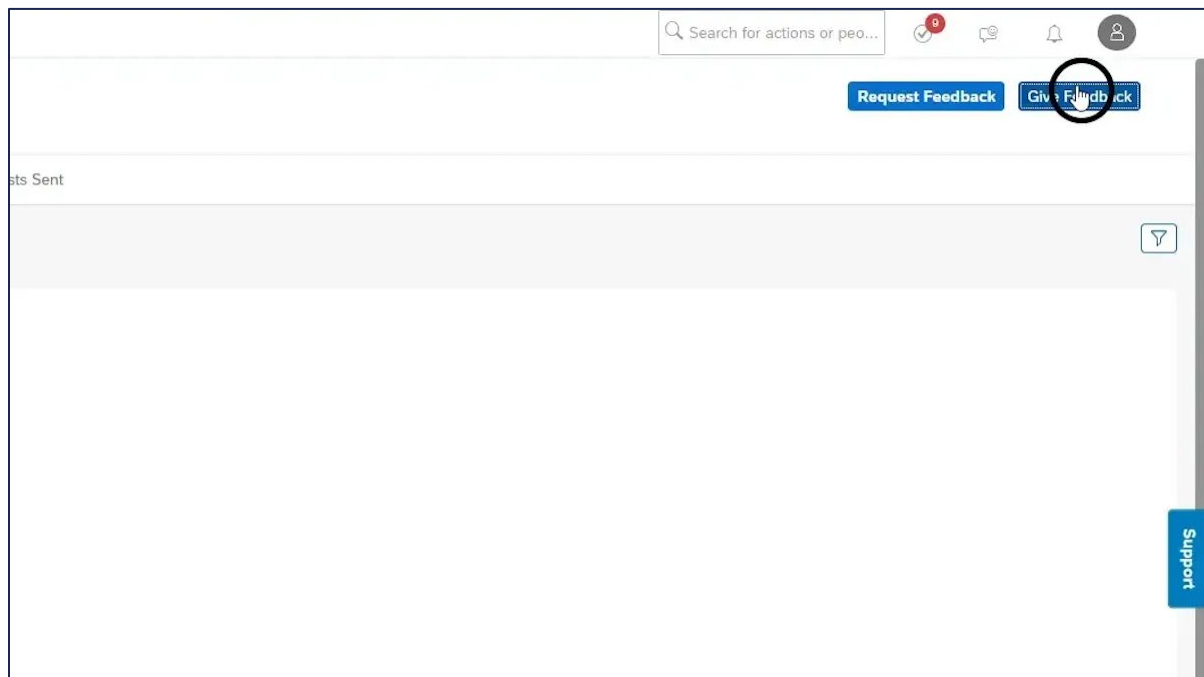


## GIVING FEEDBACK

### 1. Click on "Continuous Feedback" in the Home menu.



### 2. Click on the "Give Feedback" button.



### 3. Select the individuals to whom you want to send feedback.

NOTE: This field is required. You can select multiple people. You may send feedback from anyone in the system, regardless of your relationship.



### 4. Enter the Feedback Topic.

NOTE: This field is required. You have a 500-character limit in this field. Be specific about the topic and the type of feedback you are requesting.

5. Edit the questions, if necessary. Then, type in your responses.

2022 (2)

VQ HUMAN RESOURCES

**Team Building - Weird Wednesday**

Feedback received on October 10, 2022

What went well?

VQ "Staff engagement was successful. Discussion and jovial. Everyone re positive mood through

View more

**Select people**

Choose one or more people:\*

Select at least one person for this feedback

AM HR CONSULTANT SPECIALIST

**Enter a topic and at least one question and corresponding response.**

Feedback Topic:\*

PMGM Script

Question 1:

What went well?

Please enter a response

Question 2:

What could I improve on?

6. After you have answered all of the questions, click the "Send" button to send your feedback.

"Staff engagement was successful. Discussion and jovial. Everyone re positive mood through

View more

Question 2:

What could I improve on?

Formatting and organization.

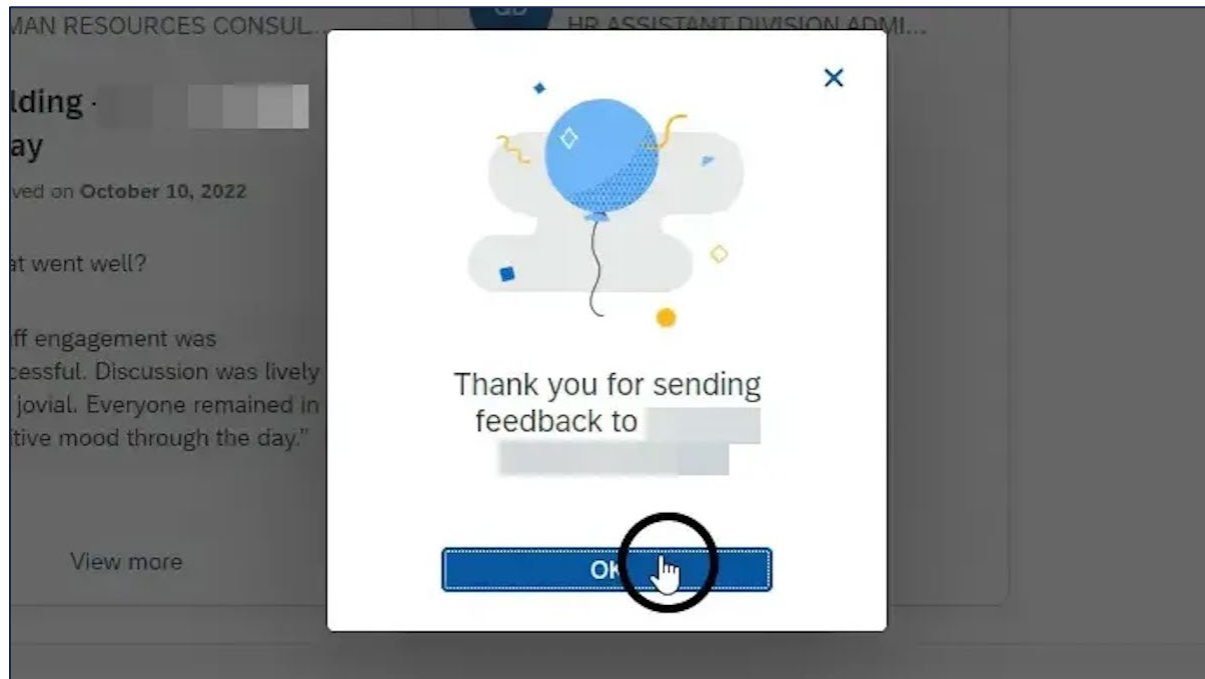
Question 3:

Any additional comments?

Come see me and we can work on the organization.

Send Cancel

7. Click "OK" in the confirmation message.



---

## APPENDIX

---

### SCS COMPETENCY MODEL

Below are the names and definitions of the competencies as they appear in SuccessFactors.

#### ACCEPTING DIRECTION

*Definition:*

The ability to accept and follow directions from those higher in the chain of command.

*Behaviors:*

- Follows chain-of-command
  - Supports the decisions of leadership
  - Complies with requests
  - Performs tasks and duties as assigned
- 

#### ACTING DECISIVELY

*Definition:*

The ability to make decisions quickly and effectively.

*Behaviors:*

- Moves quickly to make quality decisions and commit to a clear course of action
  - Comfortable making decisions based on partial information
  - Willing to take calculated risks in order to maintain momentum
  - Makes decisions based on consideration of short- and long-term consequences
- 

#### ACTING WITH ETHICS AND INTEGRITY

*Definition:*

The ability to be consistent, honest, and a trustworthy steward of State resources.

*Behaviors:*

- Adheres to the ethical code established by the State of Louisiana
  - Fulfills promises made to others
  - Uses the State's resources responsibly
  - Maintains trust by being authentic and reliable
-

---

## ADAPTING TO CHANGE

*Definition:*

The ability to adjust plans, expectations, and behaviors in response to change.

*Behaviors:*

- Adjusts plans in accordance with change initiatives
  - Adjusts expectations in accordance with change initiatives
  - Adjusts behavior in accordance with change initiative
- 

## BUILDING AND SUPPORTING TEAMS

*Definition:*

The ability to combine one's actions and efforts with others to work toward achieving a common goal.

*Behaviors:*

- Fulfills individual responsibility to the team
  - Promotes the best interest of the team
  - Actively participates in team meetings and activities
  - Recognizes the skills and interests of coworkers to achieve goals
  - Shares institutional knowledge, personal knowledge, and/or experience for use by others
  - Contributes to the team
- 

## CHAMPIONING CONTINUOUS IMPROVEMENT

*Definition:*

The ability to systematically drive or promote continuous improvement.

*Behaviors:*

- Uses quality improvement cycles (e.g., Kaizen, Six Sigma, Total Quality Management) to improve systems and processing
  - Completes the entire quality improvement cycle before standardizing the improvement plan
  - Evaluates performance of systems and processes
-

---

## COMMUNICATING EFFECTIVELY

### *Definition:*

The ability to relay information correctly and appropriately to connect people and ideas.

### *Behaviors:*

- Expresses ideas and information in a clear and concise manner
  - Uses correct spelling, grammar, and sentence structure
  - Uses appropriate method based on audience and message
  - Uses appropriate tone and formality based on the audience and situation
  - Non-verbal communication supports the intended message
  - Uses active listening skills: eye contact, avoid interruption
- 

## DEMONSTRATING ACCOUNTABILITY

### *Definition:*

The ability to accept ownership for one's actions, behaviors, performance, and decisions.

### *Behaviors:*

- Takes ownership for delivering on commitments
  - Addresses problems that impact quality
  - Assumes responsibility for mistakes
  - Applies quality standards and policies of the organization consistently
- 

## DEMONSTRATING APPRECIATION

### *Definition:*

The ability to show gratitude for others' contributions.

### *Behaviors:*

- Personally acknowledges the contributions of others
  - Recognizes the contribution of others within team, department, or organization
  - Commends the success of others
-

## DEMONSTRATING BUSINESS ACUMEN

### *Definition:*

The ability to understand how the organization operates to achieve its objectives.

### *Behaviors:*

- Regularly takes opportunities to learn about the organization
- Scans the environment to keep abreast of current developments that may impact the organization
- Takes advantage of opportunities to contribute to the organization's strategic plan
- Applies business knowledge in an attempt to improve the organization's outcomes
- Monitors market trends and opportunities

## DEMONSTRATING COURAGE

### *Definition:*

The ability to apply moral, disciplined, intellectual, and/or empathetic courage to do something challenging, difficult, or uncomfortable.

### *Behaviors:*

- Takes action when injustices occur, human rights are violated or when others are treated unfairly
- Remains steadfast in the face of setbacks and/or failures
- Challenges existing thoughts, beliefs, processes based on new learning, understandings, and insights obtained from experience or education
- Recognizes personal bias to empathize with the experiences and perspectives of others

## DEMONSTRATING INNOVATION

### *Definition:*

The ability to generate original ideas that create value, improve processes, or provide new products or services.

### *Behaviors:*

- Generates original ideas that create value
- Converts ideas from general concepts into actionable plans
- Accepts failure as a natural part of the innovation process
- Exhibits persistence in pursuit of innovation

---

**DEMONSTRATING INITIATIVE***Definition:*

The ability to assess information and take action independently to help the organization achieve its goals.

*Behaviors:*

- Assess current information or situation accurately
- Takes action on one's own without being prompted
- Ensures one's actions support the organizational goals

---

**DEMONSTRATING PERSISTENCE***Definition:*

The ability to achieve goals by overcoming adversity.

*Behaviors:*

- Sustains production despite challenges
- Takes small steps toward the end goal
- Tries alternate methods when faced with challenges

---

**DEMONSTRATING SELF-AWARENESS***Definition:*

The ability to manage one's personality, behavior, skills, and emotions.

*Behaviors:*

- Objectively evaluates one's personality, behavior, skills, and emotions
- Evaluates one's intent versus one's impact
- Works to develop one's self through reflection and self-improvement

---

**DEVELOPING PERFORMANCE***Definition:*

The ability to assist others in advancing their skills, knowledge, and performance levels over time.

*Behaviors:*

- Establishes trusting relationships to increase psychological safety
  - Shows patience and empathy toward challenges, concerns, and problems faced by others
  - Reinforces clear performance expectations
  - Provides timely, realistic, and actionable feedback
-

---

## DEVELOPING PLANS

*Definition:*

The ability to prioritize tasks and competing demands to create accurate plans.

*Behaviors:*

- Clearly defines goals and tasks to execute plans
  - Estimates time and resources need to accomplish tasks
  - Considers obstacles that might impact future plans
  - Makes adjustments to plans as needed
- 

## DISPLAYING EXPERTISE

*Definition:*

The ability to exhibit specialized skills or knowledge gained from experience or training.

*Behaviors:*

- Exhibits the specialized skills and knowledge associated with the position
  - Effectively applies specialized knowledge and skills to perform work tasks
  - Keeps job skills current
- 

## DISPLAYING PROFESSIONALISM

*Definition:*

The ability to recognize how one's actions impact others' perceptions of both one and one's organization.

*Behaviors:*

- Upholds agency image
  - Follows agency protocols during internal and external business interactions
  - Rebounds or is able to re-establish composure quickly
  - Expresses confidence in ability to succeed
- 

## DRIVING RESULTS

*Definition:*

The ability to identify important goals and work to achieve them.

*Behaviors:*

- Identifies goals
  - Prioritizes tasks based on goals.
  - Determines key performance indicators
  - Evaluates progress based on key performance indicators
  - Meets desired goals within specified time frame
-

---

## DRIVING VISION AND PURPOSE

### *Definition:*

The ability to consistently communicate a compelling picture of the organization's vision and purpose and link that vision to the daily actions of self or others.

### *Behaviors:*

- Identifies the strategic goals and directions of the organization, division, group, or individual
  - Communicates the organization's strategic goals and directions
  - Links the organization's vision and purpose to short- and long-term goals
  - Refers to vision and purpose when making business decisions
- 

## EXHIBITING SOCIAL AWARENESS

### *Definition:*

The ability to identify and adapt one's actions based on the situation and the personality, behavior, and emotions of others.

### *Behaviors:*

- Interprets verbal and nonverbal cues of others to determine emotions accurately
  - Identifies the appropriate interpersonal style based on the personality, behavior, and emotions of others
  - Identifies the dynamics of an environment or situation
- 

## FOCUSING ON CUSTOMERS

### *Definition:*

The ability to serve the needs of those who support and/or rely on the services provided.

### *Behaviors:*

- Conducts a thorough assessment of what the customer wants and needs
  - Fosters positive relationships with internal and external customers
  - Delivers services and/or products that meet customer expectations
  - Responds to customer questions and requests in a timely manner
-

## FOLLOWING POLICIES AND PROCEDURES

### *Definition:*

The ability to comply with policies and procedures of the organization as well as State Civil Service rules, and all applicable federal and state laws.

### *Behaviors:*

- Follows policies and procedures of the organization
- Follows all applicable federal and state laws
- Follows all State Civil Services rules
- Identifies conflicts between policies, rules, and laws

## FOSTERING ENGAGEMENT

### *Definition:*

The ability to encourage others to invest in their work and the organization's success.

### *Behaviors:*

- Assesses the engagement level of others
- Determines the internal and external motivators of others
- Creates a plan to increase engagement

## INFLUENCING OTHERS

### *Definition:*

The ability to have an intentional effect on aligning other's someone's opinions, behavior, and development with organizational goals.

### *Behaviors:*

- Persuades others to act in alignment with organizational goals
- Presents information and logic in a manner that addresses the audience's interests, concerns, and needs
- Facilitates conversations that positively impact the organization
- Applies appropriate type of power to achieve positive results

## LEADING CHANGE

### *Definition:*

The ability to initiate, manage, influence, and evaluate change.

### *Behaviors:*

- Creates vision for change initiatives
- Determines how others will be impacted by change initiative
- Establish feedback loops
- Monitors the pace and effectiveness of the change process
- Removes barriers that may hinder the change process

---

## LEADING EFFECTIVE TEAMS

### *Definition:*

The ability to guide and motivate a team to create, plan for, and achieve goals.

### *Behaviors:*

- Determines the best way to gather and disseminate information
  - Collaborates with team members to generate ideas
  - Develops a process for decision making
  - Develops processes for evaluating personal and team success
  - Develops process for confronting constructively
- 

## LEARNING ACTIVELY

### *Definition:*

The ability to acquire necessary knowledge and skills to improve performance and achieve organizational goals.

### *Behaviors:*

- Learns whatever is needed to overcome challenges that are unfamiliar and/or unknown
  - Locates relevant and credible resources
  - Discovers alternate courses of action that improve performance
  - Applies new knowledge and/or skills learned to optimize performance
- 

## LEVERAGING TECHNOLOGY

### *Definition:*

The ability to use and improve technology and its related processes to further organizational goals.

### *Behaviors:*

- Operates existing technology to perform job tasks
  - Adapts quickly to new technology
  - Uses technology to streamline existing processes and products
  - Uses most appropriate software or information systems to find information
-

---

## MAKING ACCURATE JUDGMENTS

*Definition:*

The ability to form an opinion objectively and decisively based on relevant information and in accordance with established standards.

*Behaviors:*

- Bases decisions on a systematic evaluation of relevant facts, information, and established standards
  - Avoids making assumptions or rushing to judgment based on personal bias
  - Provides clear rationale for decisions or recommendations
  - Considers opposite or multiple points-of-view
- 

## MANAGING AMBIGUITY

*Definition:*

The ability to perform as expected with partial information and/or in uncertain circumstances.

*Behaviors:*

- Remains productive even then situations or information are unclear
  - Makes decisions without having the total picture
  - Reduces ambiguity by asking questions, seeking information and making connections
- 

## MANAGING BUDGETS

*Definition:*

The ability to be a good steward of state resources by effectively managing allocated funds.

*Behaviors:*

- Establishes an accurate budget based on allocated funds
  - Assigns funds appropriately to meet agency needs
  - Project costs throughout the year based on budgeted allocations
  - Monitor projected and actual costs throughout the budget year
  - Adjust projections as new information becomes available
  - Reallocate funds to account for shortfalls and overages
-

## MANAGING CONFLICT

*Definition:*

The ability to recognize and navigate disagreements in a rational, unbiased, and productive way.

*Behaviors:*

- Addresses conflicts so they do not escalate
- Seeks information to understand the different conflict management styles
- Helps people find common goals and interests

---

## MANAGING FROM A DISTANCE

*Definition:*

The ability to manage others in telework status and/or across multiple locations.

*Behaviors:*

- Establishes clear performance expectations
- Implements processes to maintain communication
- Implements processes to maintain collaboration
- Uses technology to evaluate productivity levels

---

## MANAGING MEETINGS

*Definition:*

The ability to conduct a meeting and manage others to accomplish the results needed in the allotted amount of time.

*Behaviors:*

- Develops an agenda to define meeting objectives
- Keeps meetings timely and focused on the agenda
- Actively involves all meeting participants in the discussion
- Ends meetings with clearly defined outcomes and action steps

---

## MANAGING PERFORMANCE

*Definition:*

The ability to direct and to evaluate the work of employees.

*Behaviors:*

- Establishes work and behavior expectations
- Holds people accountable for progress on work goals
- Evaluates the work of others
- Recognizes people who achieve results and deliver on performance expectations

---

## MANAGING PROJECTS

### *Definition:*

The ability to initiate, plan, execute, manage, and close-out all project goals within the established timeline.

### *Behaviors:*

- Communicates project goals, timelines, and statuses
- Assigns individual tasks with clear deadlines
- Identifies project interdependencies and potential resource constraints
- Monitors overall project progress to ensure timely completion of goals
- Close-out project by transferring deliverables

---

## MANAGING RESOURCES

### *Definition:*

The ability to ensure resources such as time, money, and people are utilized appropriately to result in maximum business value.

### *Behaviors:*

- Manage allocated resources
- Optimizes resources based on business need
- Monitors resources using accurate tracking methods

---

## MANAGING RISKS

### *Definition:*

The ability to identify, assess, and control risks and opportunities to fulfill an organization's mission.

### *Behaviors:*

- Identifies potential risks
- Analyzes potential risks
- Evaluates potential outcomes
- Create risk mitigation plans

---

## MANAGING STAKEHOLDERS

### *Definition:*

The ability to identify and to respond to the sometimes competing perspectives, agendas, and expectations of different parties.

### *Behaviors:*

- Identifies all relevant stakeholders
  - Balances the interests and needs of all stakeholders
  - Communicates with multiple points of contact
-

## MANAGING SYSTEMS

### *Definition:*

The ability to predict and manage the effects of actions on interrelated or interacting components of a team, department, or organization.

### *Behaviors:*

- Analyzes the patterns and connections between components of the systems
- Examines the impact of internal and external forces on the system
- Considers long-term consequences and implications associated with actions or events
- Manages the interacting processes, procedures, or resources relative to one's position

## MANAGING THE EMPLOYEE LIFECYCLE

### *Definition:*

The ability to manage the recruitment, hiring, onboarding, performance, development, retention, and succession of employees.

### *Behaviors:*

- Implements varied competency-based recruitment strategies appropriately
- Implements competency-based, structured interviews to reduce bias
- Uses competency-based onboarding strategies
- Engages in collaborative, competency-based conversations to establish performance goals
- Encourages employees to become more self-directed and self-determined
- Creates succession plan to ensure continuity and quality of services

## MANAGING TIME

### *Definition:*

The ability to control one's usage of time intentionally to increase effectiveness, efficiency, or productivity.

### *Behaviors:*

- Accurately estimates time required to complete tasks
- Prioritizes daily tasks to increase productivity
- Tracks progress to meet deadlines
- Reduces distractions and obstacles

---

## NAVIGATING ORGANIZATIONS

### *Definition:*

The ability to identify what an organization values and how decisions are made to accomplish strategic goals.

### *Behaviors:*

- Identifies appropriate political, social, and economic advocates
- Explains how decisions are made and work gets done through formal and informal organizational structures
- Gains buy-in from critical stakeholders by leveraging networks of advocates

---

## NEGOTIATING AGREEMENTS

### *Definition:*

The ability to reach a consensus when parties may have conflicting interests or perspectives.

### *Behaviors:*

- Reaches consensus to clarify overall goal
- Use active listening when discussing ideas and differences
- Identify areas of compromise

---

## NETWORKING

### *Definition:*

The ability to intentionally develop or maintain with internal partners, external partners, and professional contacts.

### *Behaviors:*

- Remains open to meeting new people
- Acts as a resource for others by offering assistance or sharing expertise
- Establish rapport with contacts by using open-ended questions and active listening techniques

---

## PURSuing PROFESSIONAL DEVELOPMENT

### *Definition:*

A personal commitment to take advantage of opportunities to increase one's professional knowledge, skills, and abilities.

### *Behaviors:*

- Identifies formal and informal opportunities for growth
- Transfers new knowledge to the job as opportunities arise
- Seeks feedback from others on ways to increase current performance

---

## SOLVING PROBLEMS

*Definition:*

The ability to discover solutions to problems.

*Behaviors:*

- Identifies a problem
- Seeks multiple perspectives to determine the complexity of a problem
- Determines the root cause of a problem
- Brainstorms potential solutions
- Implements solutions for desired results

---

## TESTING AND TROUBLESHOOTING

*Definition:*

The ability to perform routine maintenance and inspections and resolve operating malfunctions to ensure machines and tools are functioning as expected.

*Behaviors:*

- Familiarizes oneself with the nature in which machinery and tools are supposed to operate
- Performs routine maintenance and inspections
- Identifies when machinery or tools are not functioning as expected
- Determines the cause of the equipment malfunction
- Implements the correct solution to ensure machinery or tools are functioning as expected

---

## THINKING CREATIVELY

*Definition:*

The ability to generate ideas, manipulate ideas, and make unconventional connections to develop original approaches.

*Behaviors:*

- Brainstorms a large number of ideas
  - Consciously shifts perspectives to find multiple possibilities
  - Produces ideas that serve a purpose and have value
-

## THINKING CRITICALLY

### *Definition:*

The ability to objectively question, analyze, interpret, and evaluate information to form a conclusion.

### *Behaviors:*

- Identifies the problem or question to clarify the purpose and context
- Evaluates relevant and reliable evidence: data, opinions, and arguments
- Identifies potential bias or logical flaws in interpretations, viewpoints, or perspectives
- Forms conclusions based on logic and factual evidence

---

## THINKING STRATEGICALLY

### *Definition:*

The ability to generate insights and identify opportunities for future growth of the organization.

### *Behaviors:*

- Identifies opportunities for change and growth using a variety of tactics
- Incorporates information from multiple reliable sources to develop ideas
- Challenges one's perspective and opinions through discussion, research, and self-reflection
- Identifies present implications of potential strategic decisions to adjust ideas accordingly
- Acknowledges how one's motives and bias affect proposed strategic decisions

---

## TRAINING OTHERS

### *Definition:*

The ability to facilitate the acquisition of work-related knowledge and skills in an effort to improve employee performance.

### *Behaviors:*

- Explains information in a way that is easy for others to understand
- Models appropriate behaviors, skills, and techniques
- Utilizes a variety of training methods to appeal to different learning styles
- Readily responds to questions and requests for assistance from others

---

## USING DATA

### *Definition:*

The ability to use relevant and valid data to inform a recommendation for action.

### *Behaviors:*

- Evaluates data sources to ensure relevancy and validity with situation and/or task
- Accurately enters data into the appropriate information systems
- Organizes data
- Analyzes data using various relevant techniques
- Draws accurate inferences based on data analysis
- Presents recommendations for action based on the results of the data analysis

---

## VALUING DIVERSITY

### *Definition:*

The ability to develop an awareness of DEIBA challenges and craft personal plans that contribute to improving organizational cultures and environments.

### *Behaviors:*

- Demonstrates awareness of challenges faced by individuals who are underrepresented
- Works to create a diversity, equity, inclusion, belonging, and accessibility environment for all
- Identifies ways one can personally plan to advance diversity, equity, inclusion, belonging, and accessibility

---

## WORKING SAFELY

### *Definition:*

The ability to maintain safety by following rules and procedures.

### *Behaviors:*

- Adheres to safety standards and protocols
- Maintains current certifications and required trainings
- Conducts routine inspections in the workplace to identify any activity, piece of equipment, or material that could be considered unsafe
- Reports unsafe working environments

## WORKING WITH FINANCIAL INFORMATION

### *Definition:*

The ability to use financial data to guide, drive, and convey the financial standing and/or outlook of an organization.

### *Behaviors:*

- Understands how financial information is used to guide business decisions
- Applies knowledge of laws/statutes, rules, and policies to ensure financial compliance is achieved
- Ensures transparency by preparing accurate financial statements for stakeholders

## DOCUMENTATION BEST PRACTICES

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 he or she supervises. 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. In fact, two or three sentences that cover the facts are much better than pages of subjective and non-factual documentation.