Continuous Performance Management (CPM)

Guide For
Agency Administrators

STATECIVILSERVICE

SAP SuccessFactors

Contents

Overview **5**

About this Guide 5

SCS Chapter 10 Rules: Continuous Performance Management 6

CPM Agency Administrator Calendar 7

Agency Administrator Quarterly Checklist 9

Quarter 1: January 1 – March 31 9

Quarter 2: April 1st – June 30th 10

Quarter 3: July 1st – September 30th 10

Quarter 4: October 1st – December 31st 11

Agency Administrator Roles and Responsibilities **14**

Your Role as Agency Administrator 14

SuccessFactors Access 15

Organization Management Requirements **16**

Exceptions 16

Agency Administrator's Tools in SuccessFactors **18**

How to Access the Admin Center 18

Summary of Admin Center Tools 20

Manage Scheduled Reviews 20

Delete Form 21

Route Form 21

Route Signature Stage Form 22

Manage Document Visibility 22

Restore Deleted Forms 23

Transfer to New Supervisor 23

Launch Forms 23

Security Permission Reports 24
Tools and Favorites 25
Types of Forms 28
Performance Planning Form 28
Performance Evaluation Form 29
New Appointment/Replan Performance Planning Form 30
Rating Replacement Form 31
Not Evaluated Rating Form 32
Special Considerations for Forms 33
Launching Forms 34
Launching Forms for Individual Employees 34
Using Filters to Launch Evaluation 41
Group of Employees 48
Form Management 54
How to Delete a Form in SuccessFactors 54
How to Restore a Deleted Form 58
How to Route a Form 61
How to Transfer a Form to a New Supervisor in SuccessFactors 68
Route Signature Stage Form 73
Manage Document Visibility 77
Goal Status: Unapproved vs Approved 82
How to Unapprove a Goal Plan 83
Reports 85
CPM Reporting 85
Troubleshooting CPM Reports in SuccessFactors 87
Employee Master Data Report 89

Needs Improvement Comparison 91
Form Status Report 93
Incomplete Forms Report 96
Invalid Forms Report 98
Detailed Ratings Report 100
Errors Report 102
Overview Classified Employees & Overview Unclassified Employees Report 104
Ratings^ Final Report 107
Report Questions/Issues 108
FAQs 109

Overview

About this Guide

The Continuous Performance Management (CPM) Guide for Agency Administrators is a comprehensive resource designed to assist in the effective implementation and administration of the Continuous Performance Management process in SuccessFactors.

The goals of this guide are to:

- **How-To Manual**
  Detailed step-by-step instructions for executing essential CPM tasks to help you with launching forms, routing forms, managing goal plans, and utilizing SuccessFactors tools.
- **Quick Reference Tool**
  Organized for ease of navigation, enabling you to swiftly find answers to common administrative queries or troubleshooting issues in real time.
- **Workshop Companion**
  Offers in-depth follow-up support and detailed explanations of system processes after completing the training provided during State Civil Service CPM workshops.

This guide is structured to align with the real-time processes and decisions that Agency Administrators encounter throughout each phase of the performance cycle—from planning and evaluation to reporting. Each section includes practical examples, typical scenarios, and reminders to help maintain compliance with Civil Service Chapter 10 Rules and internal CPM policies.

By utilizing this guide, Agency Administrators can confidently oversee the technical and procedural aspects of performance management, fostering a culture of continuous improvement and accountability within their agencies.

NOTE: The information and screenshots in this guide reflect SAP SuccessFactors as of October 2026. The system is updated twice a year, so its screens and images may change after an update.

SCS Chapter 10 Rules: Continuous Performance Management

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

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

More information for the Rule-by-Rule Review for Chapter 10 can be found in CPM Resources (Chapter 10) CPM Resources (Chapter 10) or scan the QR code.

CPM Agency Administrator Calendar

This calendar outlines important dates and deadlines for agency administrators related to Continuous Performance Management (CPM).

January 1

- The CPM evaluation period for the previous year begins.
- The CPM planning period for the current year begins.

March 1

- The CPM evaluation period for the previous year ends.
- The CPM planning period for the current year ends.

First Monday in March

- This is the earliest date that Exceptional payments may be made based on the previous performance year's CPM rating.

Mid-March

- Deadline for employees who received an Unsuccessful rating to request an Agency Review.

April 16

- Deadline to issue Agency Review results for Unsuccessful ratings.

April 30

- Deadline to issue Performance Improvement Plans for Unsuccessful ratings.

July 15

- Market adjustments based on CPM 2025 Performance Year ratings.

October 1

- Employees appointed on or after October 1 shall be rated Not Evaluated for the next evaluation period.

December 31

- Last day to make Exceptional payments based on the previous year's CPM performance rating.

Continuous Performance Management (CPM)

Agency Administrator Calendar

Date	Action
January 01	CPM Evaluation Period for the previous year begins CPM Planning Period for the current begins
March 1	CPM Evaluation Period for the previous year ends CPM Planning Period for the current year ends
First Monday of March	Earliest date to make "Exceptional" Payments based on CPM "Previous Year" Performance Year rating
Mid-March	Deadline for employees to request Agency Review for "Unsuccessful" ratings only
April 16	Deadline to issue Agency Review Results for "Unsuccessful" ratings
April 30	Deadline to render Performance Improvement Plan for "Unsuccessful" ratings only
July 15	Market Adjustment: Based on CPM 2025 Performance Year Rating.
October 1	Any employee appointed on or after October 1 shall be rated 'Not Evaluated' for the next evaluation period.
December 31	"Exceptional" Payments: Last date to make payments for "Exceptional" based on CPM in the Previous year's Performance rating

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Agency Administrator Quarterly Checklist

Recommended Practices — Not Requirements

Use this suggested checklist as a guide to support your agency's CPM process. Adapt the activities and frequency to fit your agency's workflow and specific needs. Use the checklist throughout the year as often as needed to organize CPM activities, support, and follow-up.

Quarter 1: January 1 – March 31

CPM Evaluation and Planning Period

Recommended Activities

- Launch Planning and Evaluation forms, as needed.
- Run the following reports as needed:
    - Overview Classified (Planning and Evaluation)
    - Form Status (Planning and Evaluation)
- Follow up with Evaluating Supervisors and 2nd Level Evaluators, as needed.
- Communicate important due dates throughout the agency as needed.

Important Dates and Deadlines

- **March 2:** Earliest date to make Exceptional payments based on the applicable CPM performance year rating.
- **March 16:** Deadline for employees with Unsuccessful ratings to request an Agency Review.

Quarter 2: April 1st – June 30th

Review and Report

- Launch New Hire / Re-Planning forms, as needed.
- Maintain the Organizational Chart.
- Run the following ratings reports as needed:
    - Overview Classified (Planning and Evaluation)
    - Form Status (Planning)
    - Final Ratings Report
    - Invalid Forms
    - Not Evaluated/Rating
    - Needs Improvement Rating Comparison.
- Follow up with Evaluating Supervisors and 2nd Level Evaluators, as needed.
- Communicate important due dates throughout the agency as needed.

Important Dates and Deadlines

- **April 16:** Deadline to issue Agency Review results for Unsuccessful ratings.
- **April 30:** Deadline to issue Performance Improvement Plans for Unsuccessful ratings.

Quarter 3: July 1st – September 30th

Prepare for Next Year

- Run the following reports as needed:
    - Form Status (Planning)
    - Overview Classified (Planning)
- Launch New Hire / Re-Planning forms, as needed.
- Follow up with Evaluating Supervisors and 2nd Level Evaluators, as needed.

- Communicate important due dates throughout the agency as needed.

Important Dates and Deadlines

- **July 15:** Market adjustments based on previous Performance Year ratings.

Quarter 4: October 1st – December 31st

Pre-Launch Activation

- Confirm the Organizational Chart by running Employee Master Data Report.
- Run the following reports:
    - Overview Classified
    - Needs Improvement Rating Comparison
- Follow up with Evaluating Supervisors and 2nd Level Evaluators, as needed.
- Communicate important due dates throughout the agency as needed.
- Prepare next-year communications and resources.
- Prelaunch Planning and Evaluation forms for entire agency.

Important Dates and Deadlines

- **October 1:** Employees appointed on or after October 1 shall be rated Not Evaluated for that evaluation period.
- **December 31:** Last day to make Exceptional payments based on the applicable CPM performance year rating.

Important: These are suggested administrative practices only. Follow current CPM guidance and agency procedures for applicable requirements.

Agency Admin Quarterly Checklist

Continuous Performance Management (CPM)

Recommended Practices • Not Requirements

Use this suggested checklist as a guide to support your agency's CPM process. Adapt the activities and frequency to fit your agency's workflow and specific needs. Use the checklist throughout the year as often as needed to organize CPM activities, support, and follow-up.

Q1 | January 1st – March 31st

CPM Evaluation & Planning Period

- ☐ Launch Evaluation & Planning forms, as needed.
- ☐ Run Reports, as needed:
  - Overview Classified (Planning & Evaluation)
  - Form Status (Planning & Evaluation)
- ☐ Follow up with Evaluating Supervisors and 2nd-Level Evaluators as needed
- ☐ Agency wide communication as needed internally about due dates

Important Dates and Deadlines

- ☐ Deadline for employees to request Agency Review for "Unsuccessful" ratings is only March 16th
- ☐ Earliest Date to Make Payments for "Exceptional" Based on the Applicable CPM Performance Year Rating March 2nd
- ☐ Deadline for employees to request Agency Review for "Unsuccessful" ratings only: March 16th

Q2 | April 1st – June 30th

Review and Report

- ☐ Launch New Hire/Re-Planning forms, as needed.
- ☐ Maintain the Organizational Chart
- ☐ Run Ratings :
  - Overview Classified (Planning & Evaluation)
  - Form Status (Planning)
  - Final Ratings Report
  - Invalid Forms
  - Not Evaluated/Rating
  - Needs Improvement Rating Comparison
- ☐ Follow up with Evaluating Supervisors and 2nd-Level Evaluators as needed
- ☐ Agency wide communication as needed internally about due dates

Important Dates and Deadlines

- ☐ **April 16:** Deadline to issue Agency Review results for Unsuccessful ratings
- ☐ **April 30:** Deadline to issue Performance Improvement Plans for Unsuccessful ratings.

Suggested administrative practices only. Follow current CPM guidance and agency procedures for applicable requirements.

Agency Admin Quarterly Checklist

Continuous Performance Management (CPM)

Recommended Practices · Not Requirements

Use this suggested checklist as a guide to support your agency's CPM process. Adapt the activities and frequency to fit your agency's workflow and specific needs. Use the checklist throughout the year as often as needed to organize CPM activities, support, and follow-up.

Q3 | July 1st – September 30th

Prepare for Next Year

- ☐ Run Reports, as needed:
  - Form Status (Planning)
  - Overview Classified (Planning)
- ☐ Launch New Hire/ Re-Planning forms, as needed.
- ☐ Prepare next-year communications and resources.
- ☐ Follow up with Evaluating Supervisors and 2nd-Level Evaluators as needed
- ☐ Agency wide communication as needed internally about due dates

Important Dates and Deadlines

- ☐ **July 15:** Market adjustments based on previous Performance Year ratings.

Q4 | October 1st – December 31st

Pre-Launch Activation

- ☐ Confirm the organizational chart by running Employee Master Data Report
- ☐ Run Ratings :
  - Overview Classified (Planning & Evaluation)
  - Needs Improvement Rating Comparison
- ☐ Follow up with Evaluating Supervisors and 2nd-Level Evaluators as needed
- ☐ Communicate important due dates throughout the agency as needed.
- ☐ Prepare next-year communications and resources.
- ☐ Prelaunch Planning and Evaluation forms for entire agency.

Important Dates and Deadlines

- ☐ **October 1:** Employees appointed on or after October 1 shall be rated Not Evaluated for that evaluation period.
- ☐ **December 31:** Last day to make Exceptional payments based on the applicable CPM performance year rating.

Suggested administrative practices only. Follow current CPM guidance and agency procedures for applicable requirements.

Agency Administrator Roles and Responsibilities

Your Role as Agency Administrator

This guide contains the processes you will use in your role as the Agency Administrator. As an Agency Administrator, you have the following responsibilities:

- **Serve as your agency's top performance management individual**. You are the lead authority responsible for implementing and supporting the CPM process within your agency.
- **Be familiar with SCS Chapter 10 Rules.** Understand the rules governing performance management and ensure your agency's CPM processes and practices comply with applicable requirements.
- **Collaborate with agency leadership to determine performance management system parameters**. Work with HR leadership and agency executives to establish expectations, deadlines, and priorities related to performance planning and evaluation. Collaborate with HR to resolve routing issues, correct data, and address agency-specific concerns.
- **Facilitate the performance management process at your agency.** Coordinate the launch, routing, completion, and follow-up of performance forms across departments. Ensure the appropriate form templates and routing maps are selected when launching forms, and provide guidance to supervisors and employees on system usage and process timelines.
- **Serve as the first point of contact and be responsible for investigating issues**. Respond to system, access, form-related, and process concerns from supervisors and employees. Investigate issues, coordinate solutions with appropriate agency personnel, and escalate matters when necessary.
- **Track the progression and timely completion of all planning and evaluation forms.** Use available SuccessFactors reports to monitor form launches, workflow status, and completion. Identify delays, follow up on outstanding forms, and help ensure deadlines and SCS Chapter 10 requirements are met.

SuccessFactors Access

As an Agency Administrator, you have been granted specialized access in SuccessFactors, the system utilized for managing the state's Continuous Performance Management (CPM) process. Your access is more extensive than that of typical employees or supervisors, allowing you to effectively launch, monitor, manage, and troubleshoot performance planning and evaluation forms within your assigned personnel areas.

Your access includes the following features:

- Admin Center navigation
- The ability to launch various forms (Planning, Evaluation, Alternative, Not Evaluated, Rating Replacement)
- Options to route, delete, and restore forms
- Capability to transfer forms to new supervisors
- Access to view reporting dashboards
- Visibility into all goal plans within your assigned personnel area
- Authority to "Unapprove" goal plans as necessary

By maintaining an accurate workflow for forms and staying informed about updates to CPM policies and procedures, your role significantly helps ensure that performance management is conducted fairly, consistently, and punctually throughout your agency.

Organization Management Requirements

Each form has a Route Map that outlines the workflow steps a form must undergo from initiation to final signature and specifies the role (supervisor, second-level evaluator, employee) responsible at each stage.

NOTE: Employees CANNOT have a form launched until the day after they are entered into LaGov.

For the performance management forms to route properly, supervisory relationships must be correct in LaGov. If these relationships are correct, forms will advance in the Route Map as required.

If the supervisory relationships are not correct, several issues may arise:

- Forms could bypass essential approval steps.
- Tasks may be assigned to the wrong individuals.
- Goal plans may remain “Unapproved” and inaccessible to employees.
- Completion statuses could be inaccurate or non-compliant.
- Evaluation deadlines might be missed due to routing delays.

Before launching any performance planning or evaluation forms, Agency Administrators must ensure that their agency's organization management is up to date and aligns with the agency's organizational structure. To confirm the organization management, run the Employee Master Data Report.

Exceptions

The State Civil Service Director has granted two exceptions to Civil Service Rule 10.4 (Second Level Evaluator). These exceptions provide that Second Level Evaluators are not required for two employee groups:

Agencies that have classified positions that report directly to an unclassified Executive Director, Agency Head, unclassified Department Head, unclassified Agency Head, Board, or Commission are not required to have Second Level Evaluator approval on their official CPM planning or evaluation.

Agencies that have employees for whom the Second Level Evaluator is an unclassified Executive Director, unclassified Department Head, unclassified Agency Head, Board, or Commission.

Both situations allow you to skip the 2nd Level Evaluator step on a Route Map. They do not need to provide documentation. Requests for exceptions not covered by this exception must be approved by the Director of State Civil Service.

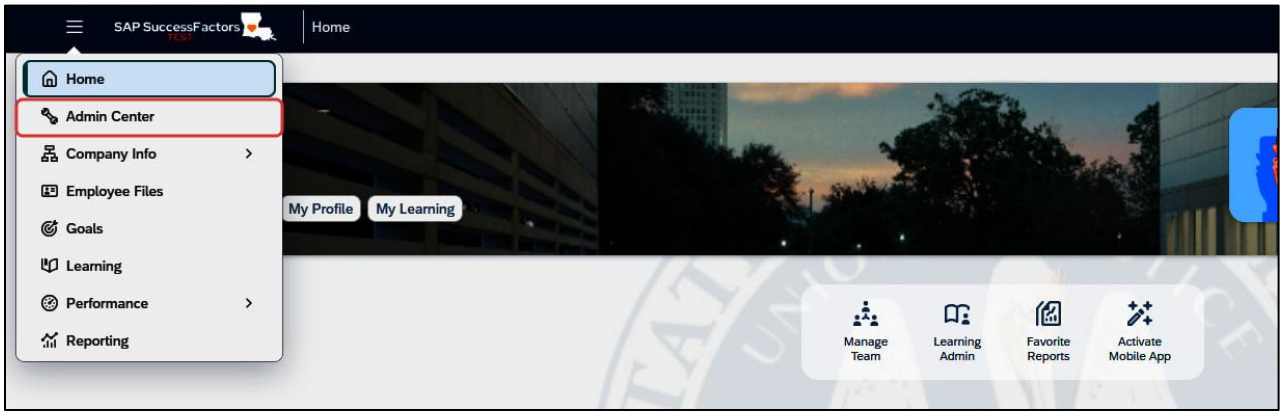
**See SCS General Circular 2025-12 for more information.

Agency Administrator's Tools in SuccessFactors

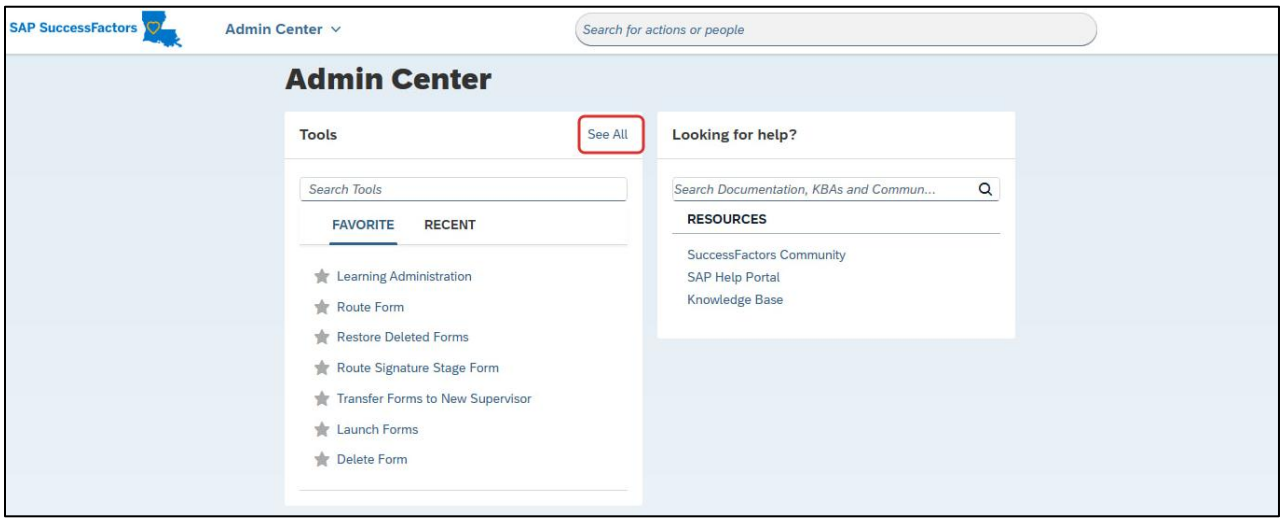
To access the **Agency Admin Tools**, navigate by hovering over **Main Menu** selecting **Admin Center,** and then clicking **See All** from the menu on the left-hand side. The system will then display a full list of administrative tools, tailored to your role and assigned permissions.

How to Access the Admin Center

1. From the SuccessFactors dashboard, click the drop-down **Main Menu** at the top of the screen. Click **Admin Center**.

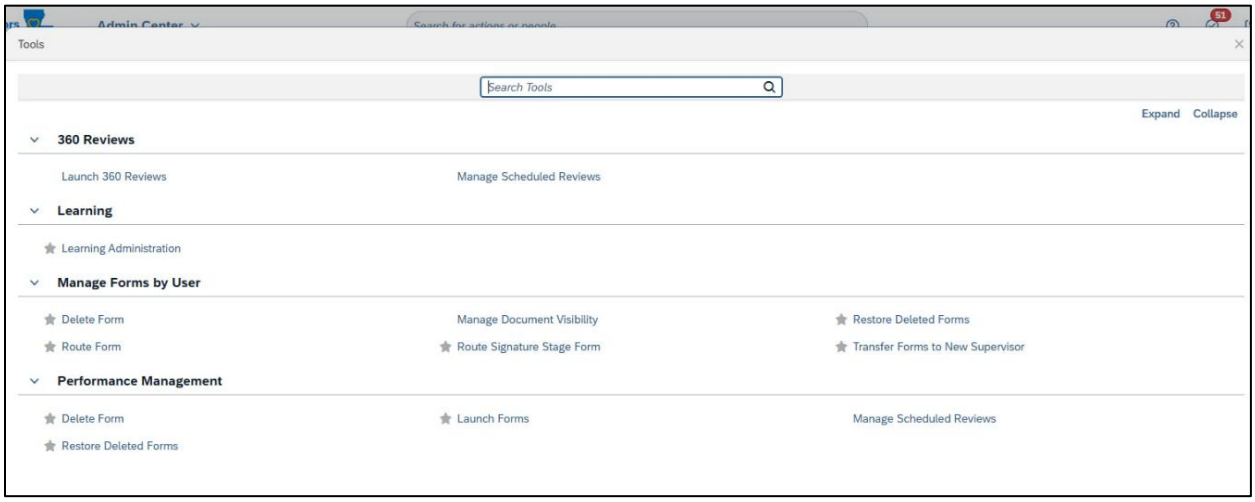


2. In the **Tools section**, click **See All.**



3. **Displayed are the actions to which you may have access.**

NOTE: The options displayed in your Admin Center may vary depending on your assigned access and permissions. To understand the purpose of the tools, when to use the forms, and key considerations, please review the “Tool Identification” section.



Summary of Admin Center Tools

This section provides a summary of tools listed in the Admin Center, explaining their purpose and appropriate use to help you understand when and why each function should be utilized.

The tools described below are available in SuccessFactors and are presented here as they apply to the Continuous Performance Management (CPM) process.

NOTE: Not all tools are available for use in SuccessFactors, even though they may appear under Tools. The following tools are not available or used in CPM processes:

- **Launch 360 Reviews**
- **Manage Scheduled Reviews**
- **Proxy Import**
- **Proxy Management**

Manage Scheduled Reviews

This function is designed to schedule the launching of forms (such as planning or evaluation forms) in advance to ensure compliance with SCS Chapter 10 Rules.

- **Purpose:** To preschedule forms to launch on a future date and time.
- **When to Use:** When the CPM Schedule mandates forms to be launched over the weekend or vacation dates.
- **Key Considerations:** Agency Administrators control the timing and launches to maintain compliance.

Delete Form

In SuccessFactors, Agency Administrators can delete performance forms from the system. This action is typically used when a form has been launched in error, contains incorrect information, or is no longer required.

- **Purpose**: Deletes a form from the system.
- **When to Use**: If a form is launched in error, contains incorrect data, or is not required.
- **Key** Considerations: **Restricted to administrators with deletion rights.**
    - Deleted forms may be recovered using the **Restore Deleted Forms** tool.

Important: After deleting a form, any attachments included in that form are not removed from the system. They remain in the *Deleted* section of the Manage Documents admin tool. To permanently remove attachments, they must be deleted directly from the forms before deletion.

Route Form

This tool enables Agency Administrators to modify the workflow path of a performance form manually. This tool can be used to move a form forward or backward within its Route Map or, in some cases, to skip a step entirely.

- **Purpose:** Allows administrators to adjust a form's workflow in the route map.
- **When to Use:** Typical uses include fixing errors (such as a form being advanced too soon) or managing exceptions (for example, when a supervisor or second-level evaluator is unavailable).
- **Key Considerations:**
    - Agency Administrators must document the reason for the adjustment to ensure accountability and compliance.
    - All adjustments must be documented for compliance with Louisiana Civil Service policy.

Route Signature Stage Form

The Route Signature Stage Form function allows Agency Administrators to adjust or reroute performance forms that are at the signature stage of the workflow.

- **Purpose:** Allows Agency Administrators to enforce the correct sequence of sign-offs required in the route map and prevents bottlenecks at the final stage of the process.
- **When to Use:**
    1. If a form is mistakenly advanced to the signature step too early, administrators can redirect it back to the appropriate step.
    2. If a form is at the final step of the Route Map and signatures are missing, misrouted, or assigned incorrectly.
- **Key Considerations:** All official form routing for Planning and Evaluation should be managed through the Route Form tool, not the Route Signature Stage Form**.**

Manage Document Visibility

This function allows Agency Administrators to control which users can view or access specific performance management forms. Visibility settings can be adjusted to hide or reveal forms for employees, supervisors, or other roles within the route map. By managing visibility, administrators maintain confidentiality and prevent errors in form processing.

- **Purpose:** Controls which users can view specific performance forms**.**
- **When to Use:**
    1. When a form has been routed incorrectly
    2. When a supervisor change requires restricting access
    3. When forms need to be withheld from view until a correction is made.
- **Key Considerations:** Supports confidentiality and compliance.

Restore Deleted Forms

Allows Agency Administrators to recover forms that were previously removed from the system. This feature is especially valuable when a form is deleted in error or needs to be reactivated for compliance or auditing purposes.

- **Purpose:** Recovers forms previously deleted.
- **When to Use:** When a form is deleted in error or needs to be reinstated for compliance/audit purposes.
- **Key Considerations:**
    - Access is permission-based and limited to agency administrators.
    - Verify Form ID and details before restoring to avoid duplication.

Transfer to New Supervisor

This tool allows Agency Administrators to reassign an employee's performance management forms to a different supervisor when organizational changes occur, such as promotions, reassignments, or staff turnover. This tool ensures that planning and evaluation forms remain active and properly routed, without disrupting the performance management cycle.

- **Purpose:** Reassigns an employee's forms to a different supervisor.
- **When to Use:** Following promotions, reassignments, or supervisor turnover.
- **Key Consideration:** Ensure Org Management is correct in LaGov.

Launch Forms

The **Launch Forms** tool initiates performance management processes by generating forms for employees and assigning them to the correct workflow. Administrators can launch forms individually, in bulk using a CSV file, or through alternative templates for new appointments or “Not Evaluated” cases. This function ensures supervisors and employees have the necessary forms in their inboxes to complete the planning and evaluation cycle.

- **Purpose:** Generates Planning or Evaluation forms for employees.
- **When to Use:**

1. At the start of the Planning or Evaluation cycle.
2. For new appointments.
3. For “Not Evaluated” cases.
4. When a Rating Replacement form is needed**.**

- **Key Considerations:**
  - Org Management must be correct in LaGov.
  - Accuracy in selecting form type and employee is critical.
  - Forms may be launched individually or in bulk via CSV upload.
  - Louisiana agencies must comply with timelines in State Civil Service Chapter 10 Rules.

Security Permission Reports

The Security Permission Reports function provides Agency Administrators with visibility into the roles, permissions, and system access assigned to users within SuccessFactors. These reports allow Agency Administrators to verify that employees, supervisors, and reviewers have the correct access to view, edit, or route performance forms.

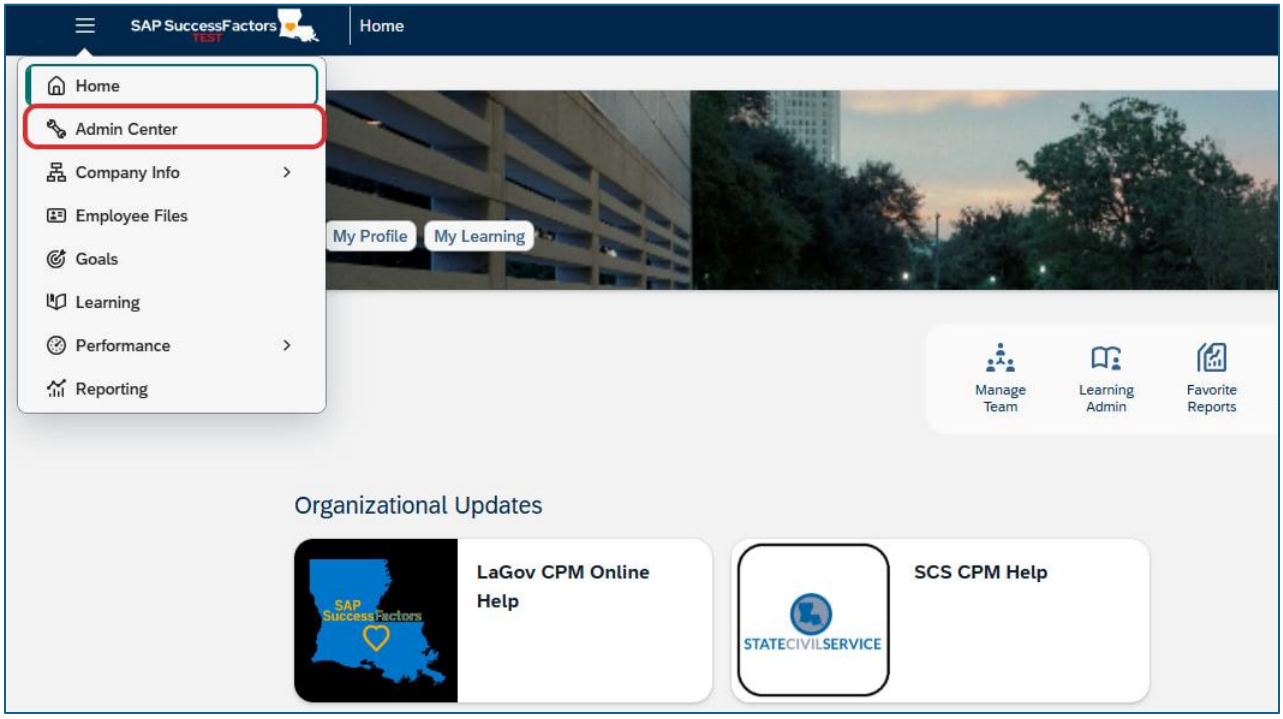
They are essential for troubleshooting issues such as missing forms, restricted visibility, or workflow interruptions caused by incorrect permissions. By regularly reviewing Security Permission Reports, administrators can maintain system integrity and ensure that performance management processes function smoothly across the agency.

- **Purpose:** Displays system roles, permissions, and access for users.
- **When to Use:** To troubleshoot visibility issues, missing forms, or routing errors.
- **Key Consideration:** Regular review ensures system integrity.

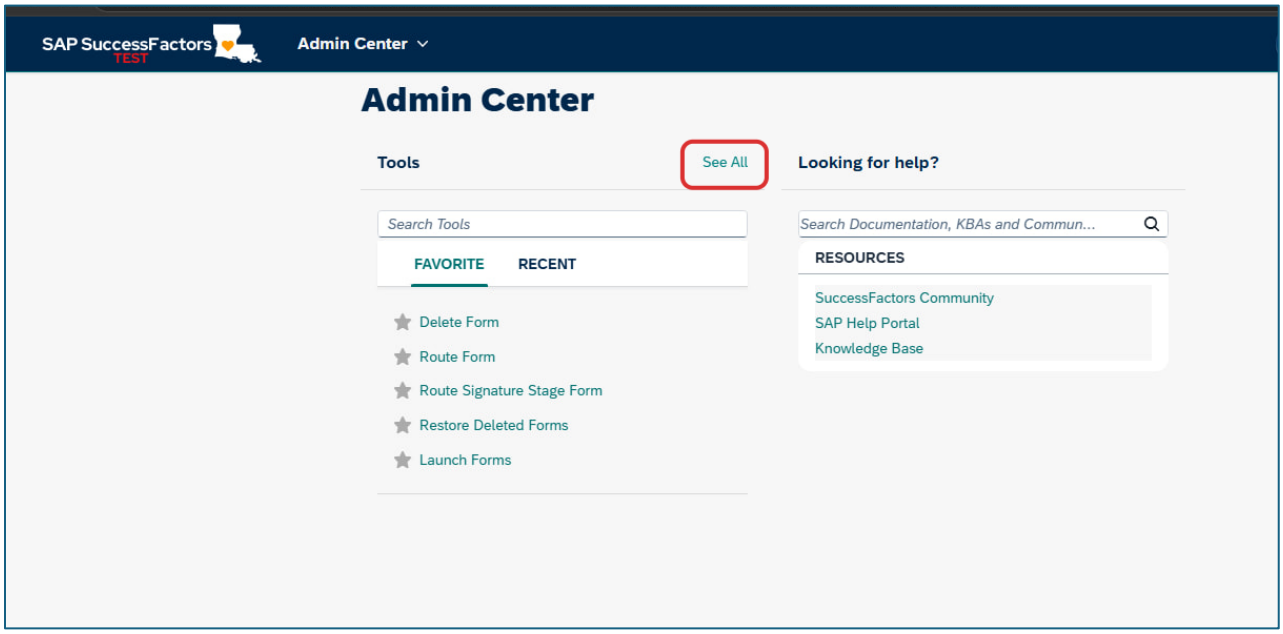
Tools and Favorites

Agency Admins may want to favorite tools to create a personalized shortcut list, saving time on routine tasks (like managing users, running reports, or updating curricula) and reducing the chance of errors from navigating multiple menus.

1. From the SuccessFactors dashboard, click the **Main Menu** at the top of the screen. Click **Admin Center.**

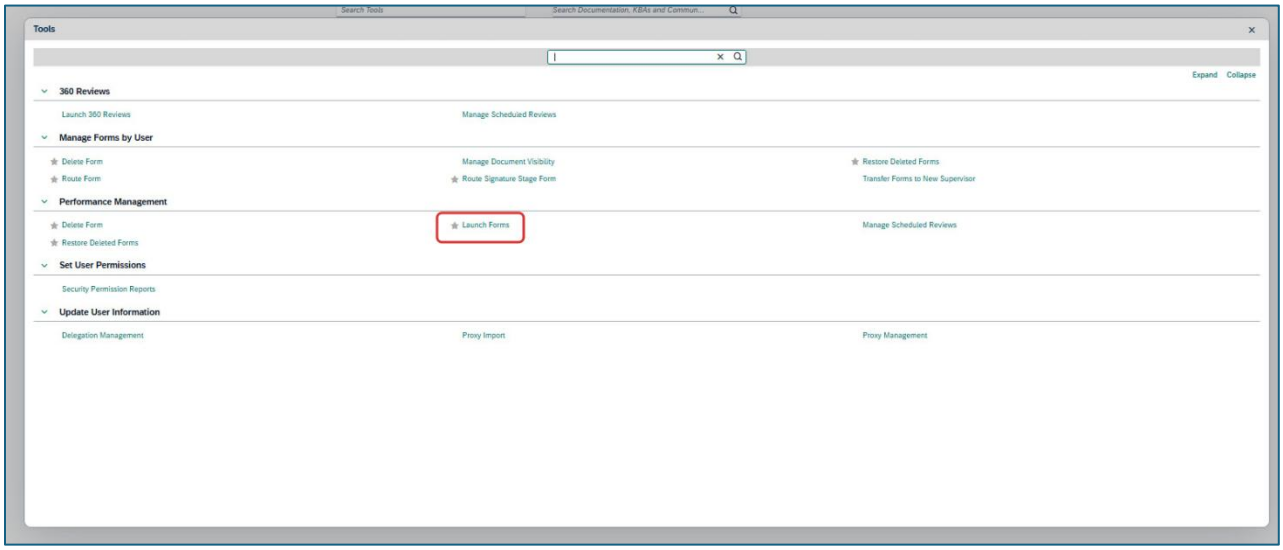


2. In the Tools section, click **See All**.



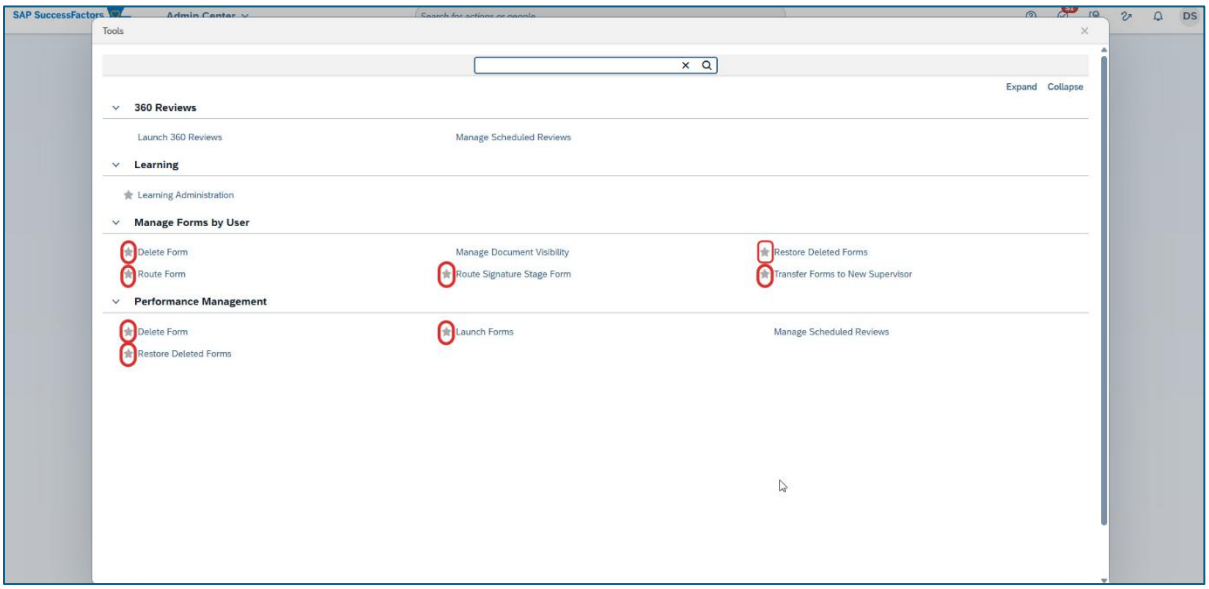
3. Displayed are the actions to which you may have access.

NOTE: The options displayed in your Admin Center may vary depending on your assigned access and permissions. To understand the purpose of the tools, when to use the forms, and key considerations, please review the "Tool Identification" section.



4. Hover over the following actions, and the star will appear. Click **the star** to add to your **Favorites**.

NOTE: Add these tools as a favorite: Delete Form, Route Form, Restore Deleted Forms, Route Signature Stage Form, Transfer Forms to New Supervisor, and Launch Forms.



Types of Forms

SuccessFactors provides several types of forms to support the Continuous Performance Management (CPM) process. Each form serves a specific purpose, from establishing performance expectations and evaluating employee performance to addressing new appointments, changes in job responsibilities, and special circumstances. Understanding when and how to use each form helps Agency Administrators select the appropriate form, maintain accurate performance records, and ensure compliance with SCS Chapter 10 Rules.

Performance Planning Form

When to Use:

- At the beginning of each performance year during the **Planning Period** (November 1-January 1).
- Within 30 days of a new hire, promotion, or reassignment that requires a new planning form.

Why to Use:

- Establishes performance expectations, goals, and development objectives for the employee.
- Provides a clear foundation for evaluating performance at the end of the cycle.
- Maintains compliance with State Civil Service Chapter 10 Rules.

What It Does:

- Creates a structured form for employees and supervisors to document agreed-upon goals.
- Routes the form through the evaluating supervisor and 2nd level evaluator for approval.
- Locks goals once approved, preventing changes unless formally unapproved by the Agency Administrator.

Performance Evaluation Form

When to Use:

- After the performance year ends during the **Evaluation Period** (January 1 – March 1).
- After the performance year has closed, supervisors must evaluate employees on the goals and expectations established in their Planning Form.

Why to Use:

- Provides a formal assessment of the employee's performance of the goals documented in the Planning Form.
- Ensures employees receive feedback, ratings, and—if necessary—development plans or performance improvement plans.
- Maintains compliance with State Civil Service Chapter 10 Rules and supports eligibility for merit increases or other personnel actions tied to performance.

What It Does:

- Creates a structured form for evaluating supervisors to rate employees on performance expectations.
- Routes through the supervisor, 2nd level evaluator, and employee for acknowledgement.
- Records the final performance rating in SuccessFactors, which may be used for pay decisions, disciplinary actions, or development planning.

New Appointment/Replan Performance Planning Form

When to Use:

- For employees who begin employment after the start of the performance year.
- When employees are reassigned, promoted, or reallocated into a new role that requires different expectations/goals.
- Anytime a new planning document is required outside of the standard planning period.

Why to Use:

- Ensures new or newly assigned employees receive clear, documented performance expectations, even if they join after the standard planning period.
- Provides fairness and consistency by aligning all employees with the CPM process, regardless of the start date or personnel changes.
- Maintains compliance with State Civil Service Chapter 10 Rules, which require planning within the first two calendar months of an appointment or reassignment.

What It Does:

- Creates a planning form for the new employee or reassigned employee that mirrors the standard Planning Form.
- Establishes goals and performance expectations for the remainder of the performance year.
- Ensures the form is launched, completed, and routed through the same workflow as standard Planning Forms, but within an adjusted timeline (launched within 30 days, completed within 60 days).

Rating Replacement Form

When to Use:

- When an original evaluation rating must be corrected or overturned, such as:
    - Upon review at the conclusion of the rating period, agency Human Resources determines a rule violation has occurred, and the employee's rating shall be Unrated.
    - Upon the conclusion of the Agency Review process, an employee's rating is overturned to "Needs Improvement."

Why to Use:

- Provides a formal and system-approved method to correct ratings without leaving duplicate or inaccurate records in the system.
- Ensures the employee's official performance record reflects the accurate, final rating in alignment with State Civil Service Chapter 10 Rules.
- Maintains transparency and fairness by clearly documenting rating corrections.

What It Does:

- Replaces the existing performance evaluation form with a new form that includes the corrected rating.
- Updates the employee's record while preserving the integrity of the performance management workflow.
- Ensures corrected ratings are reflected in reports, audits, and personnel actions (e.g., merit increases, performance improvement plans).

Not Evaluated Rating Form

When to Use:

- When an employee is not eligible for evaluation during the performance year, such as:
    - Employees who are appointed on or after October 1 of the performance evaluation year
    - Employees who transfer between January 1 and March 1,
    - Employees on extended leave (medical, military, or other approved leave).
    - Employees who separate from service before the evaluation period.
- When required under State Civil Service Rule 10.6 exceptions.

Why to Use:

1. Provides a formal method to document that an employee is “Not Evaluated” for the performance year.
2. Ensures accurate reporting in SuccessFactors so the employee’s record is not flagged as missing a required evaluation.
3. Maintains compliance with State Civil Service Chapter 10 Rules while accounting for legitimate exceptions.

What It Does:

- Generates a form that flows through the system like other CPM documents but is marked as Not Evaluated.
- Updates records to reflect the employee’s status, ensuring data integrity in performance reporting.
- Prevents errors in agency reporting and State Civil Service audits by showing the employee was accounted for under the rules, even without a rating.

Special Considerations for Forms

Form / Action	Special Considerations
Planning Form	• Must be completed first each year before the prior-year Evaluation. • Due Jan 1 – March 1. • For new hires/promotions/transfers: launch within 30 days and complete within 60 days. • Once approved, goals are locked (only admins can unapprove).
Evaluation Form	• Completed after planning for the new year is finalized. • Due by 1st Monday in March for prior year. • Based only on approved Planning goals. • Impacts pay, merit increases, and performance improvement plans.
Alternative Performance Planning Form	• Used for new hires or role changes outside standard Planning Period. • Must be launched within 30 days of personnel action and completed within 60 days. • Must be finalized before any Evaluation can occur. • If issued late in the year, employee may still be marked Not Evaluated.
Not Evaluated Form	• Used only when exceptions apply under Civil Service Rule 10.4. • Common for employees hired late, on extended leave, or separated before Evaluation. • Prevents reporting errors by documenting official “Not Evaluated” status.

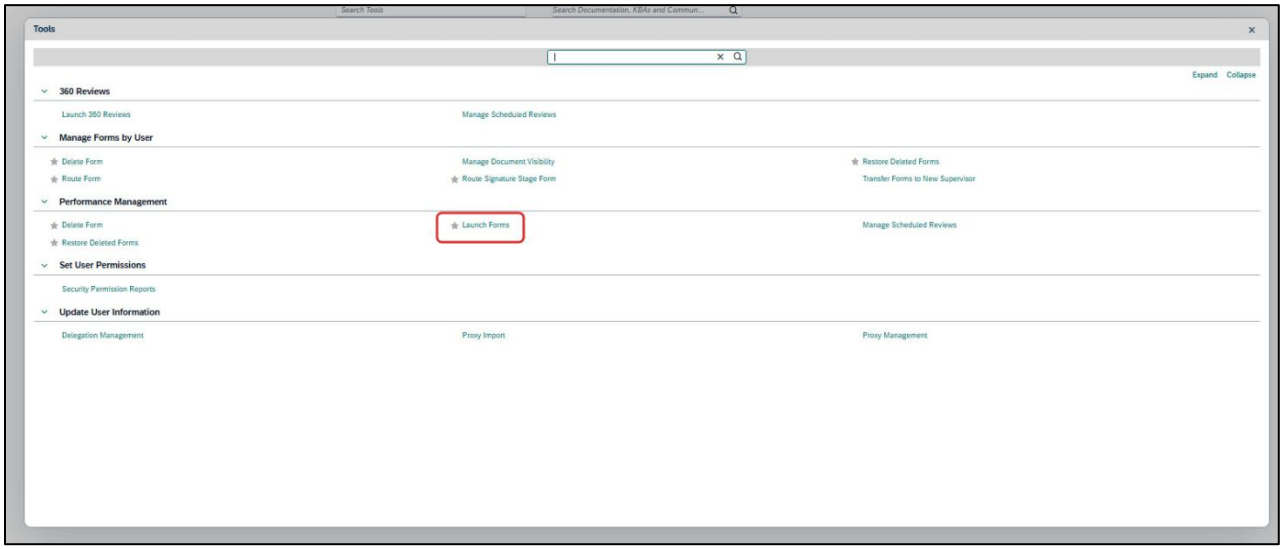
Launching Forms

The navigation steps and actions described below apply to any forms, unless otherwise noted within the instructions.

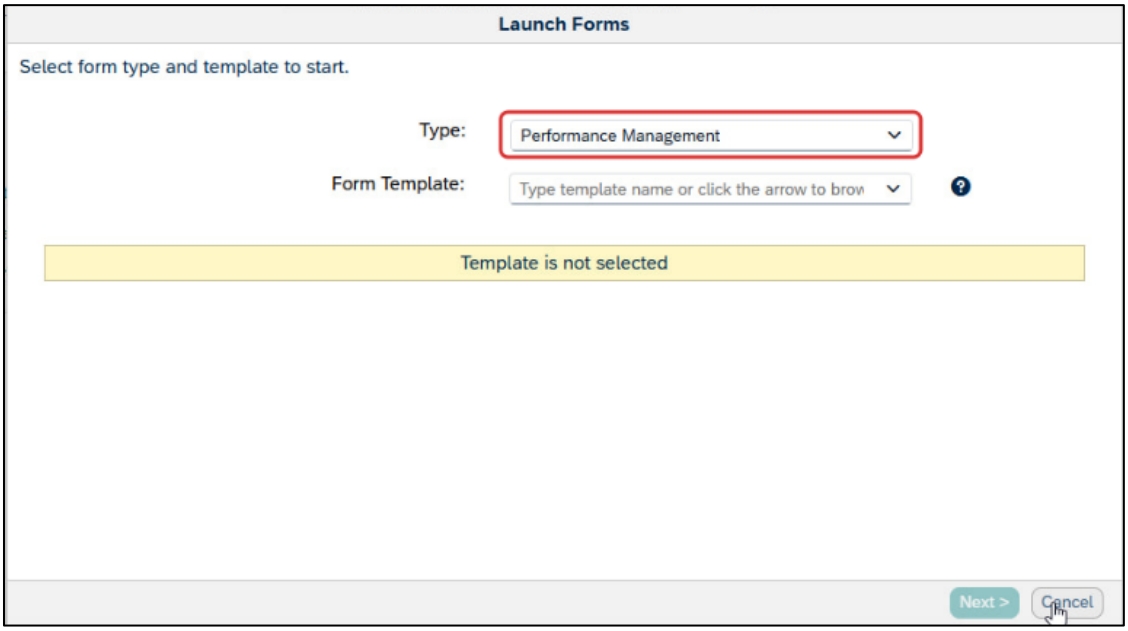
Launching Forms for Individual Employees

The process outlined below for launching any form needed for individual employees.

1. Select **Launch Forms** from the **Admin Center Tools menu.**

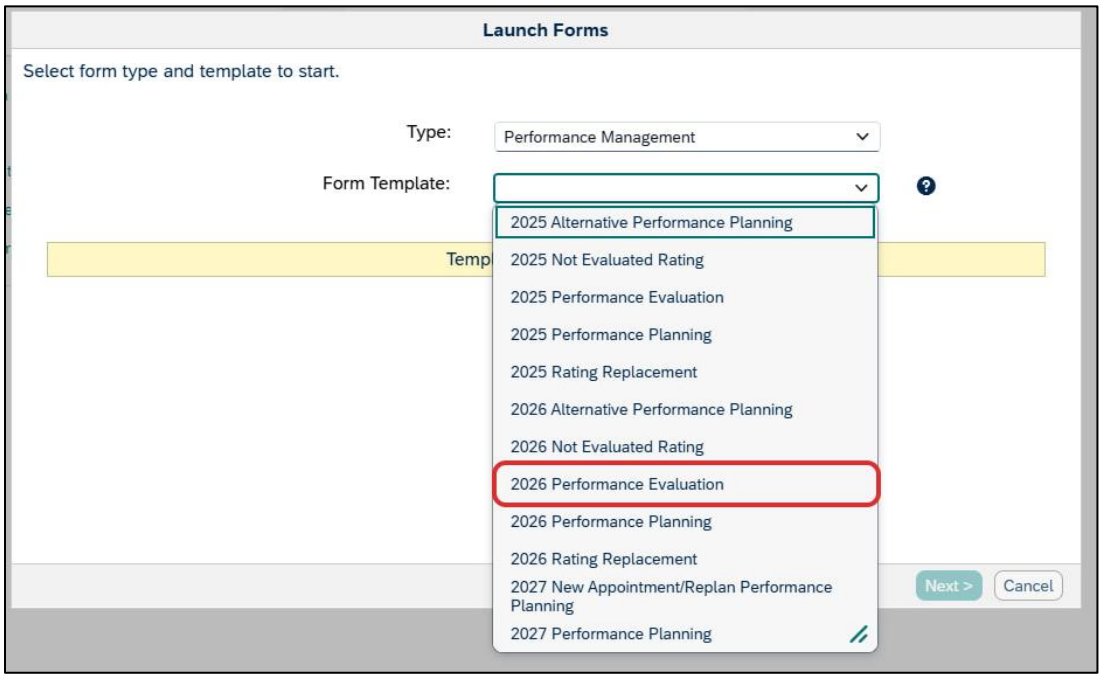


2. Click the drop-down menu for **Type** and select **Performance Management**.

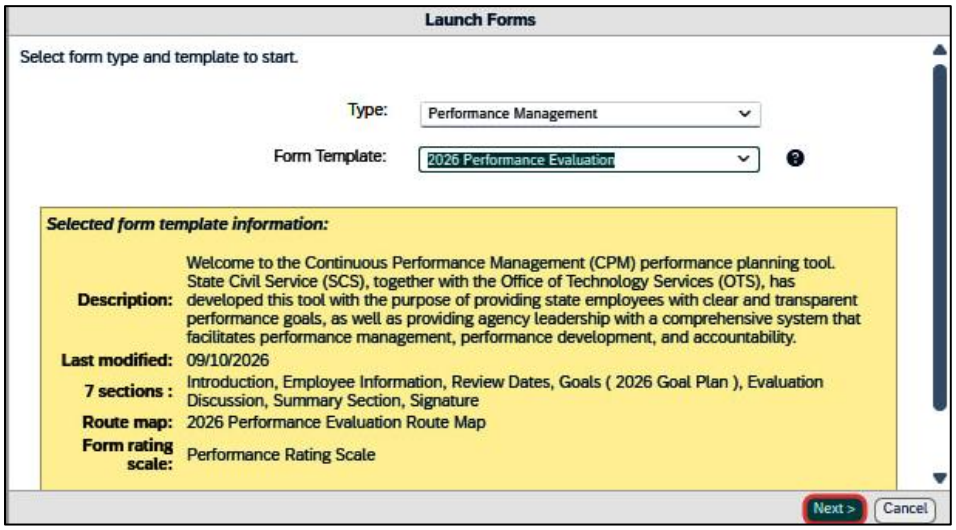


3. For the **Form Template**, select the **appropriate form** for the current year and/or situation.

NOTE: When preparing to launch CPM forms, it is critical to select the correct form template. Follow State Civil Service Chapter 10 Rules to ensure you are launching the correct form. For example, use the correct Performance Planning form when launching forms during the Planning Period, and the correct Performance Evaluation form when launching forms during the Evaluation Period. See Types of Forms for more information. All forms listed may not be available.

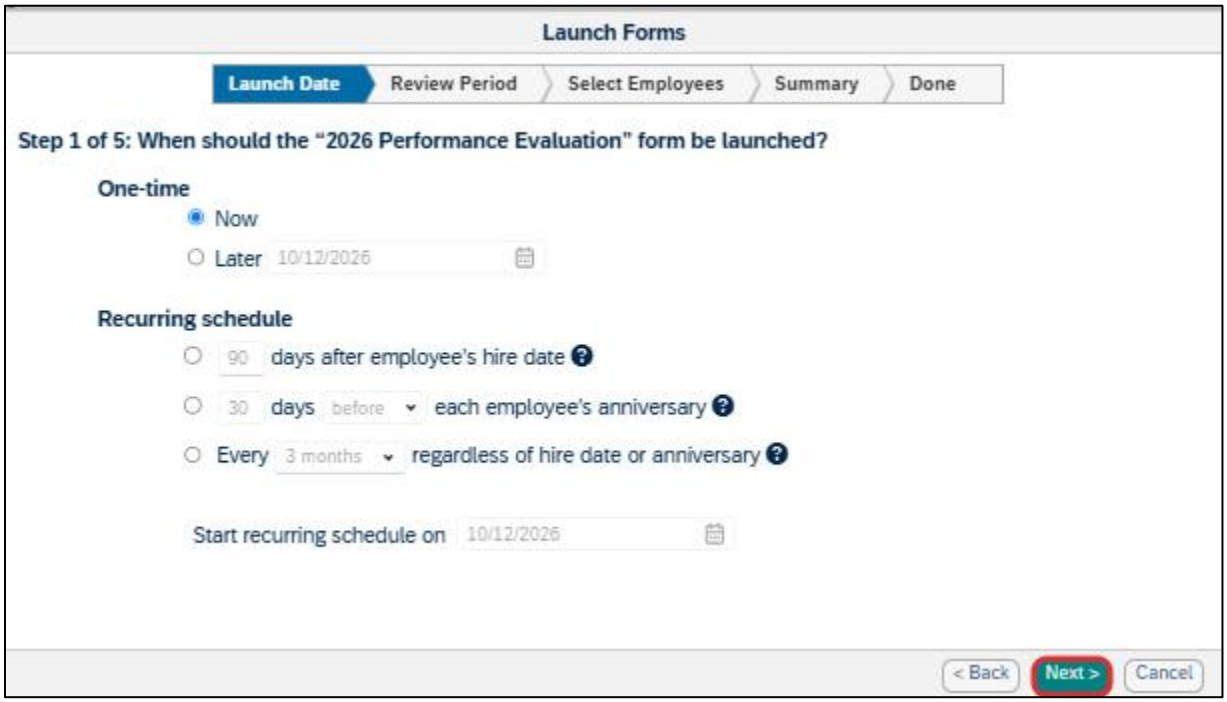


4. Click **Next**.

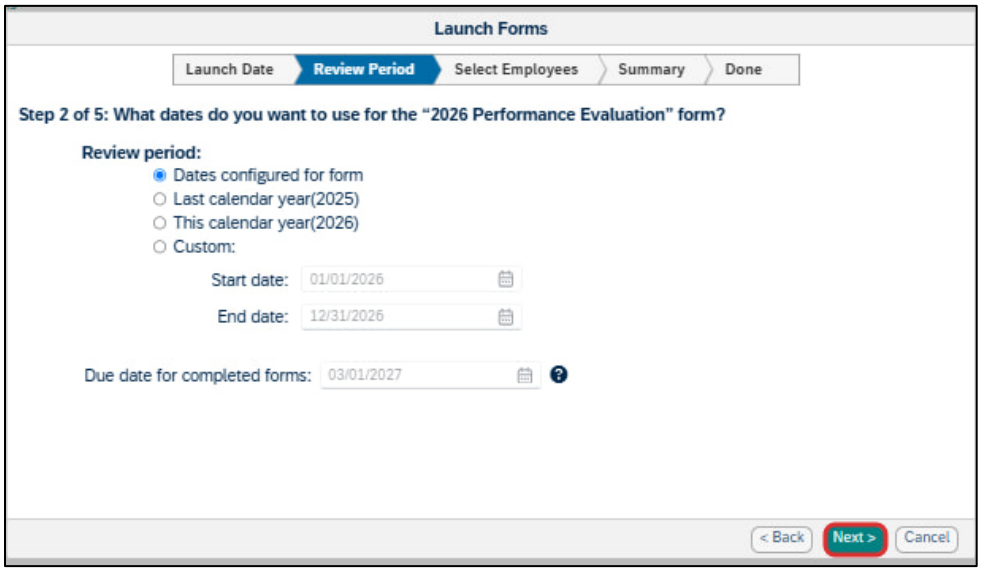


5. In the **Launch Date section**, select **Now** and then click **Next**.

NOTE: Scheduling a launch for a later date may occur for various reasons, but it is acceptable provided the agency meets Civil Service deadlines and ensures forms are routed correctly.

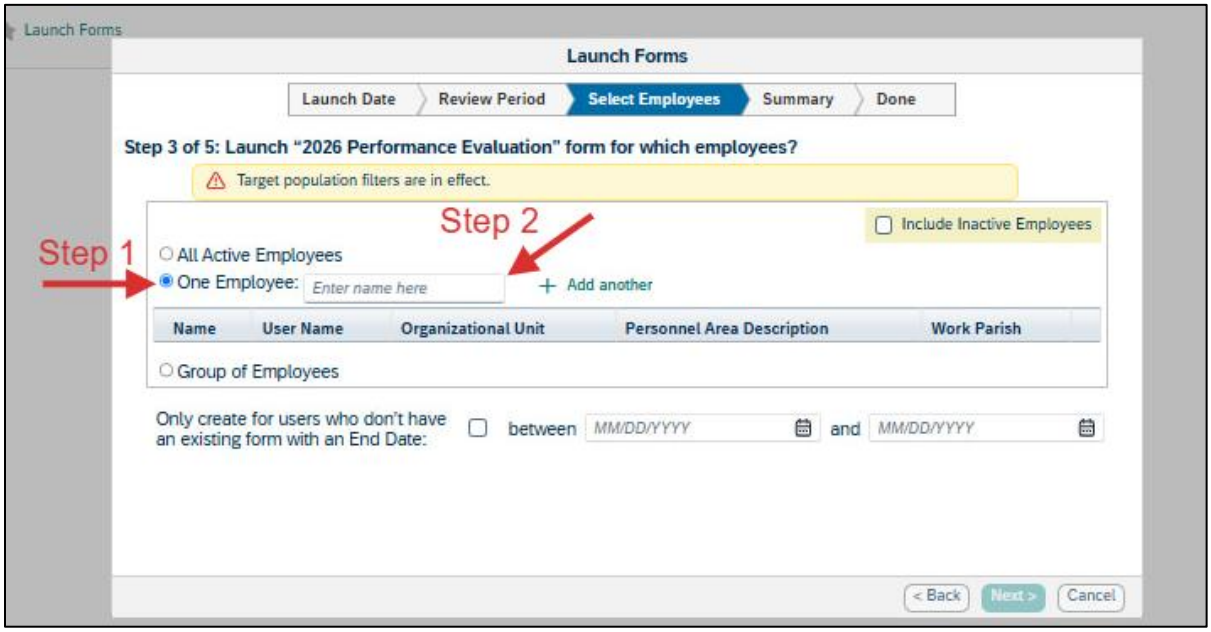


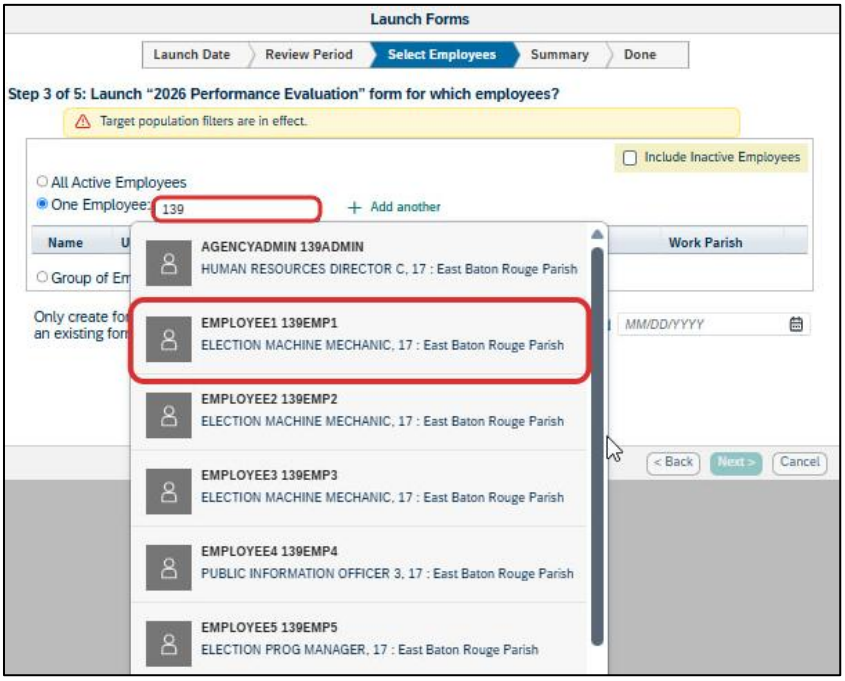
6. Select **Dates configured for form**. Click **Next.**



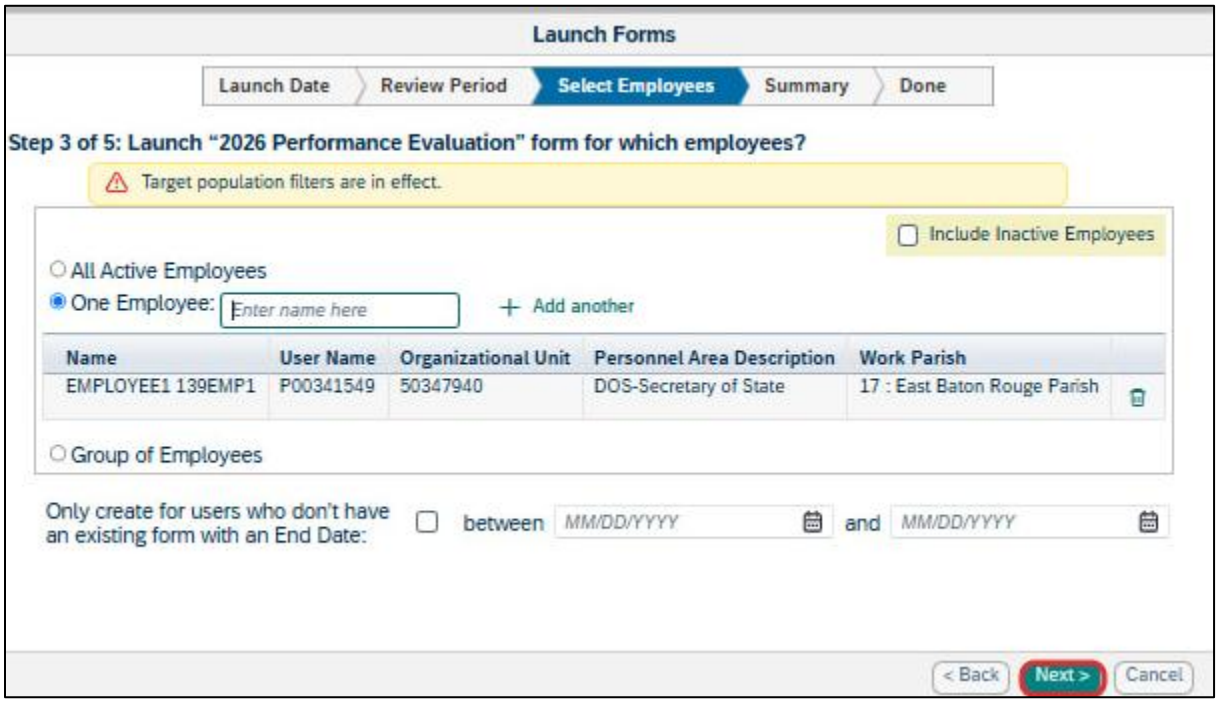
7. Select **One Employee** and enter the **employee's name** to locate the individual.

NOTE: Use the full first and last name for the most accurate results. To launch the same type of form for another employee, click "+ Add another" and follow the same process before clicking "Next."



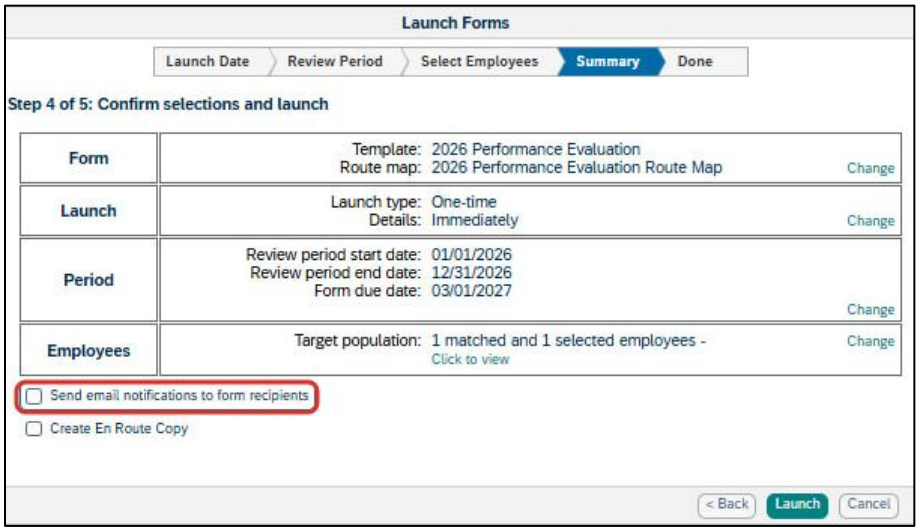


8. Click **Next**.

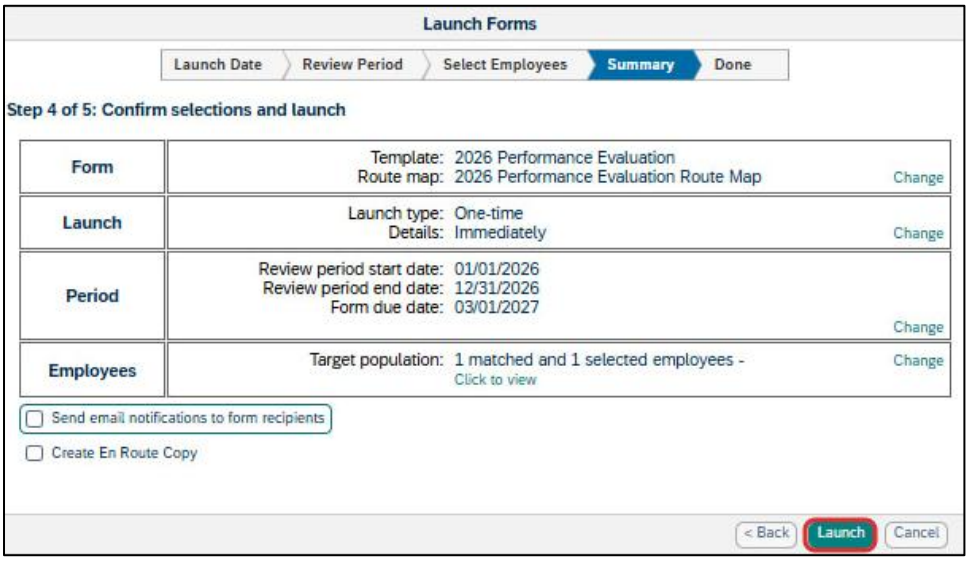


9. Once you confirm all information is correct, check the **Send email notifications to form recipients box.**

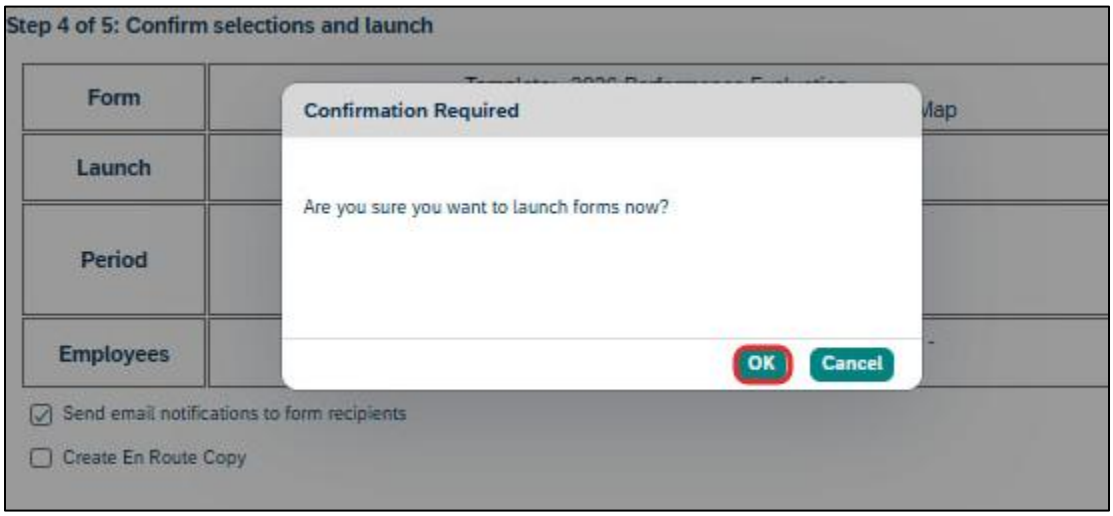
NOTE: IF NECESSARY, on the summary page, you have the option to change any of the information. If you click change, the system brings you back to that step and you will change the information and click next until you get back to the summary tab. Confirm all information is correct and click "launch."



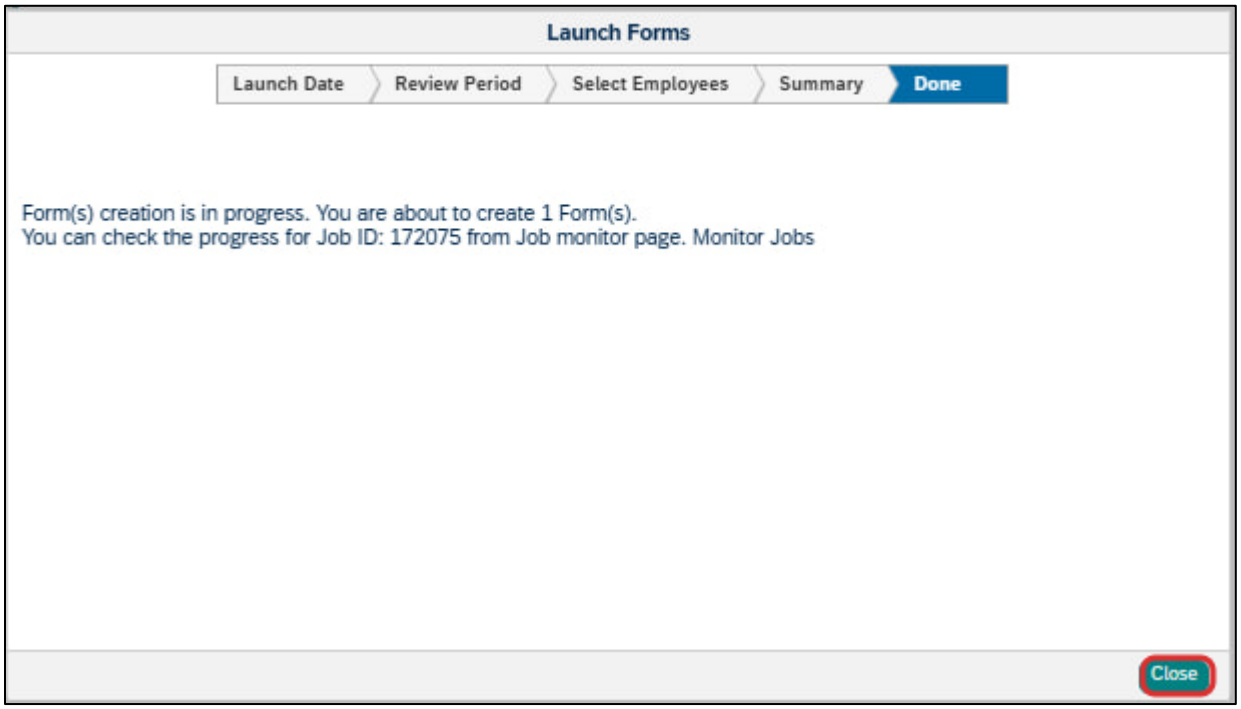
10. Click **Launch**.



11. Confirm you want to launch forms now by clicking **OK**.

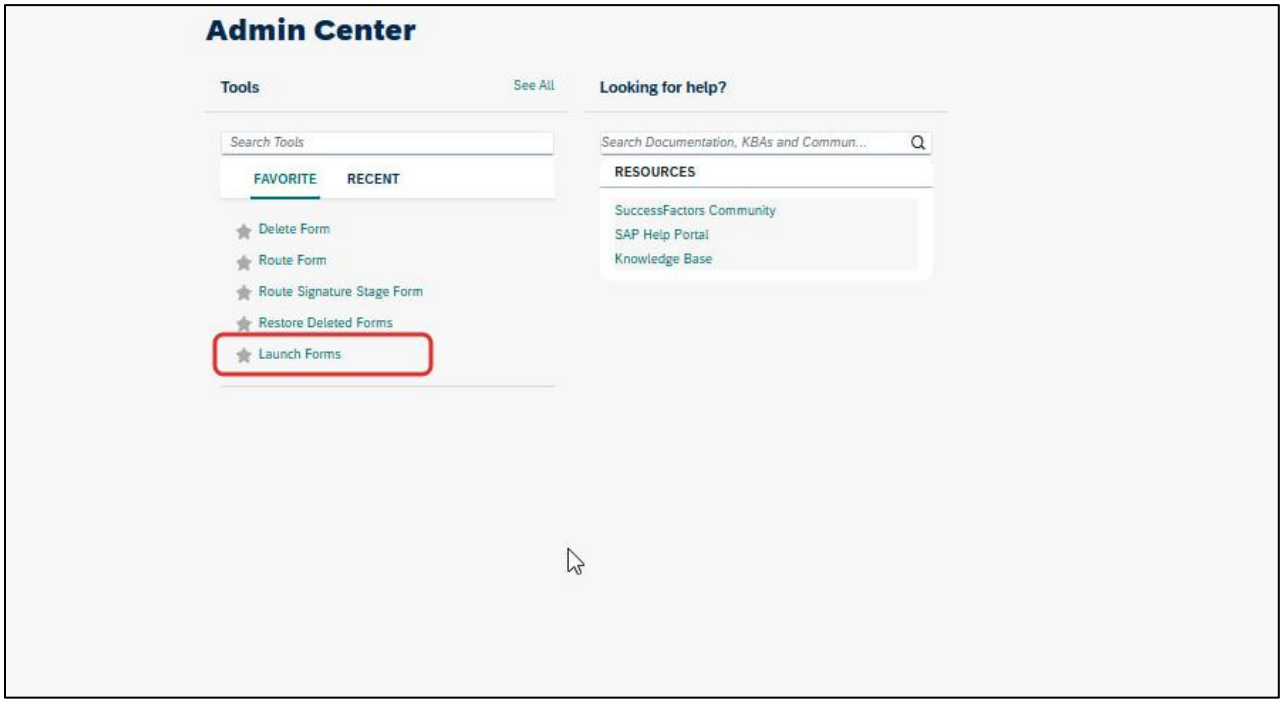


12.You will see **Form(s) creation is in progress**. Click **Close**.

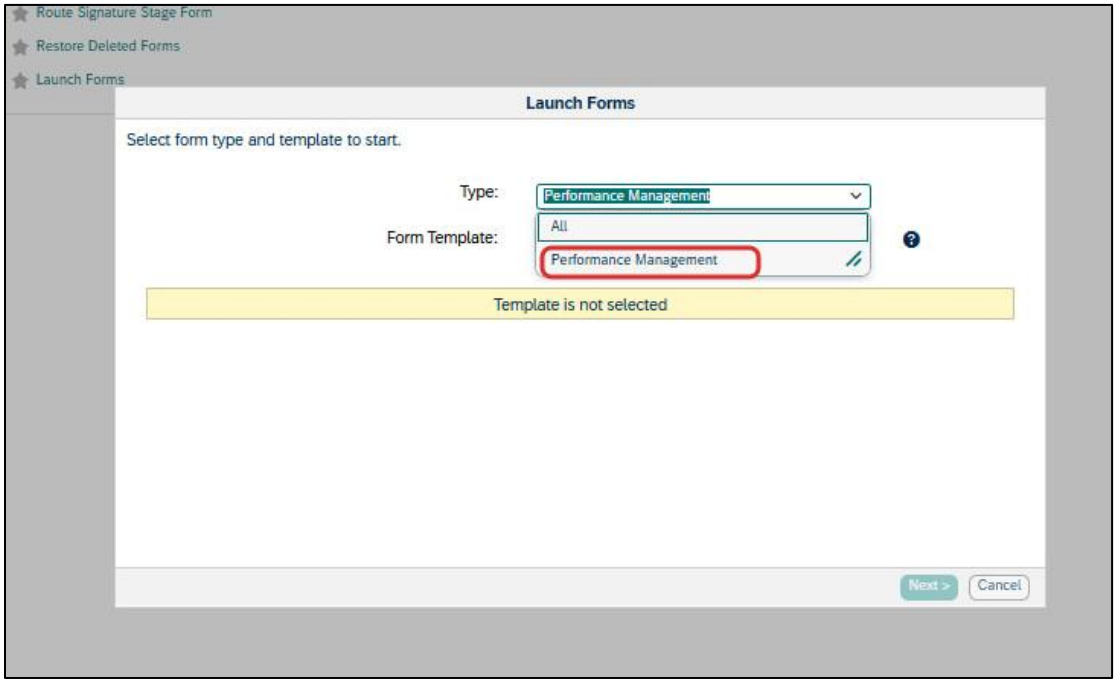


Using Filters to Launch Evaluation

1. Under Favorites, click **Launch Forms**.

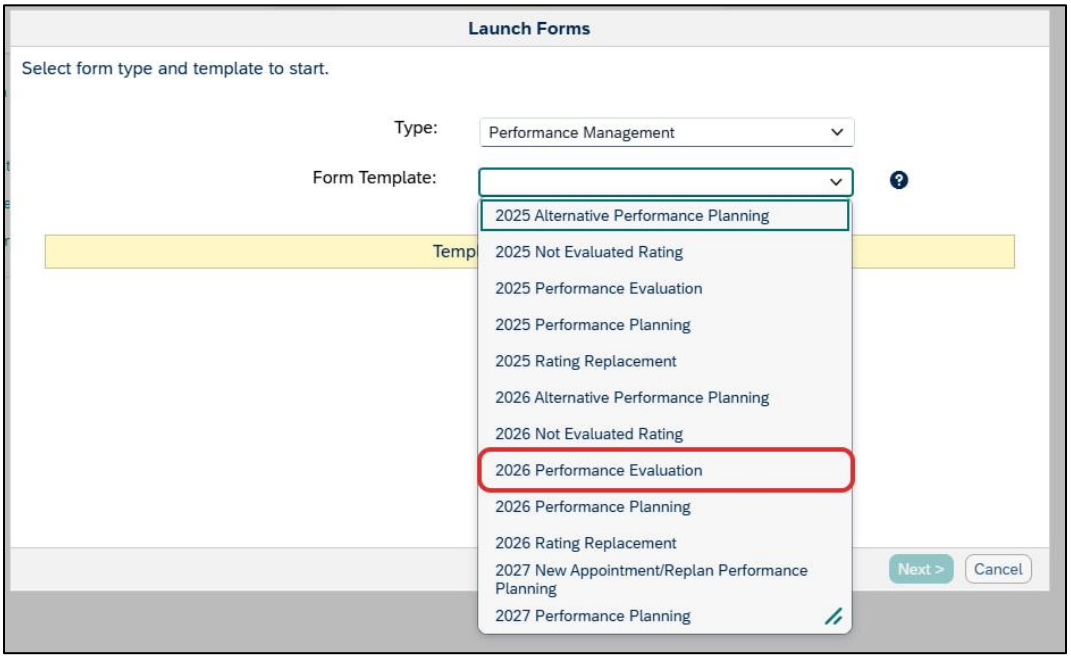


2. Select **Performance Management** as the type. Click on **Launch Forms**.

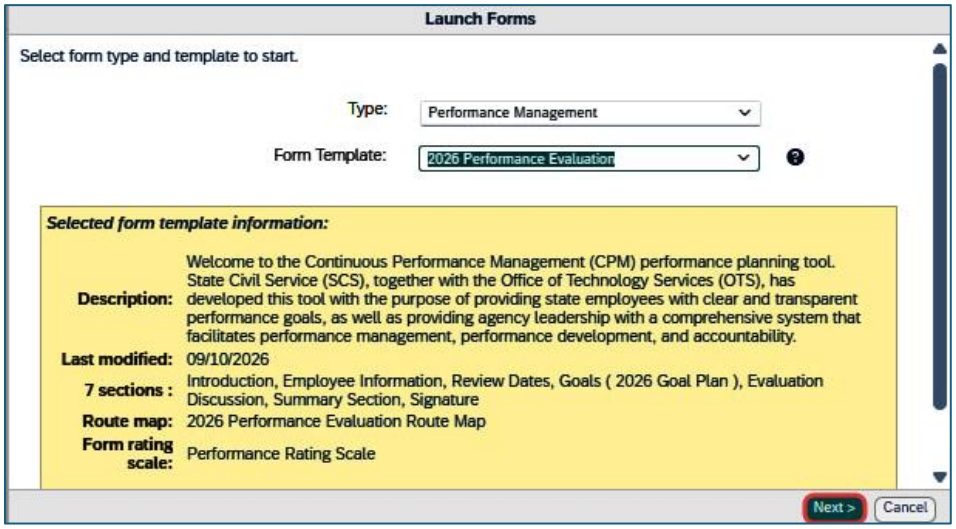


5. For the **Form Template**, select the **appropriate form** for the current year and/or situation.

NOTE: When preparing to launch CPM forms, it is critical to select the correct form template. Follow State Civil Service Chapter 10 Rules to ensure you are launching the correct form. For example, use the correct Performance Planning form when launching forms during the Planning Period, and the correct Performance Evaluation form when launching forms during the Evaluation Period. See Types of Forms for more information. All forms listed may not be available.

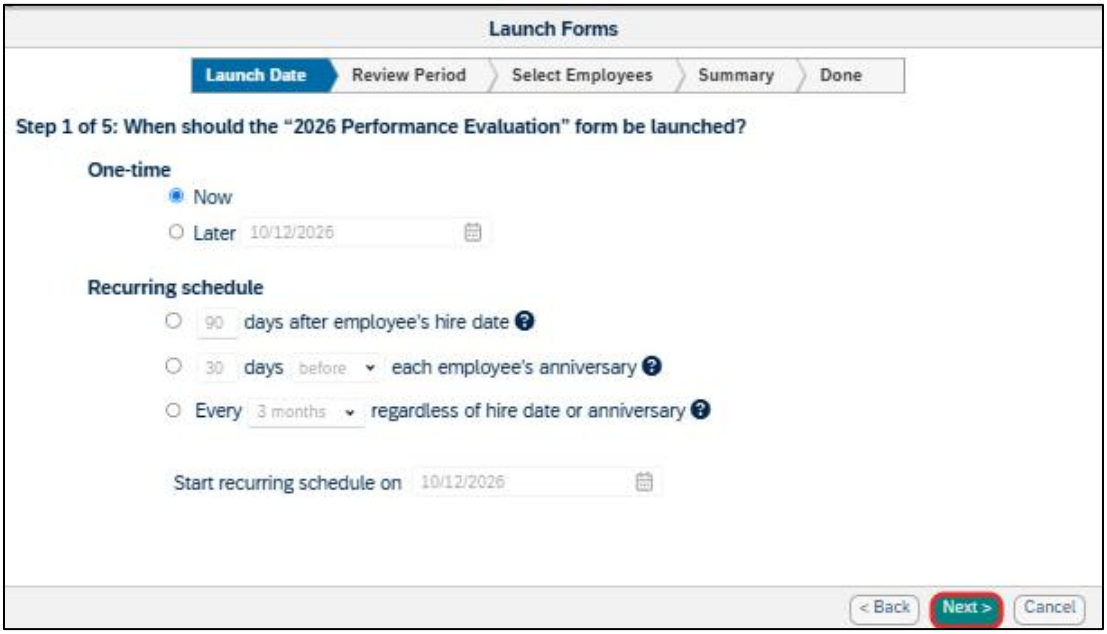


6. Click **Next**.

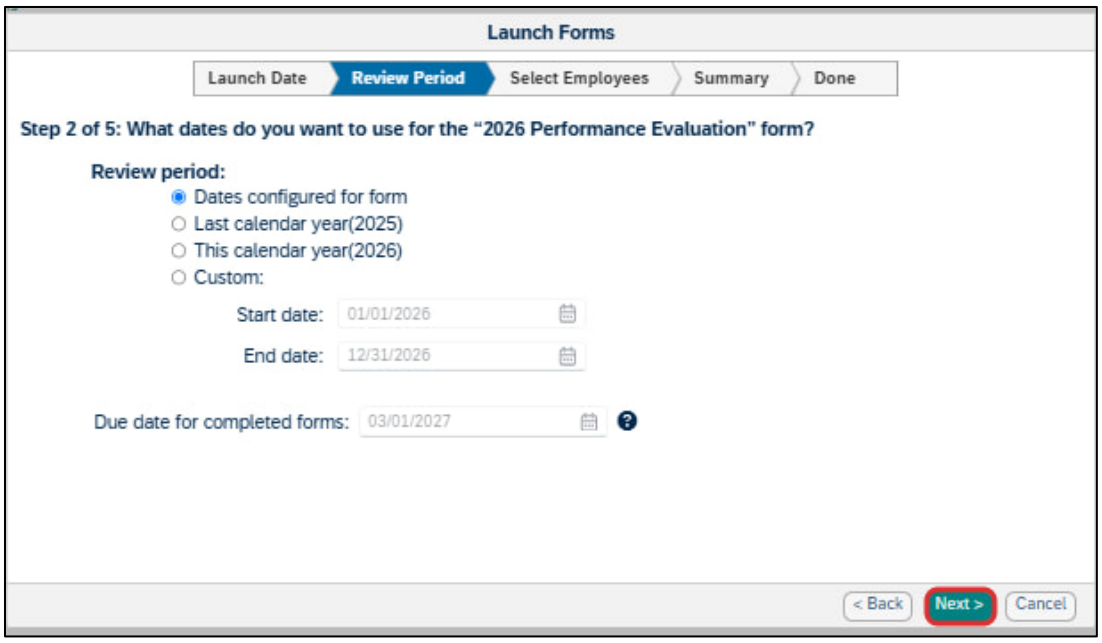


7. In the **Launch Date** section, select **Now** and then click **Next.**

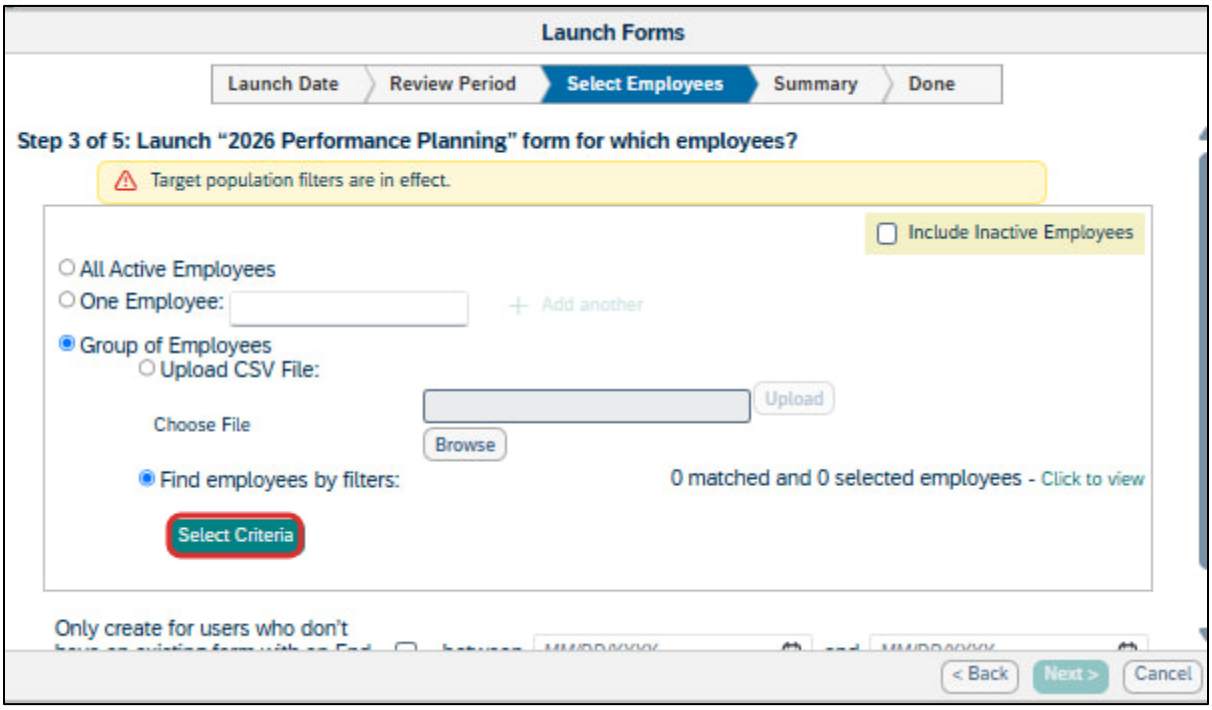
NOTE: Scheduling a launch for a later date may occur for various reasons, but it is acceptable provided the agency meets Civil Service deadlines and ensures forms are routed correctly.



8. Select **Dates configured for form**. Click **Next.**

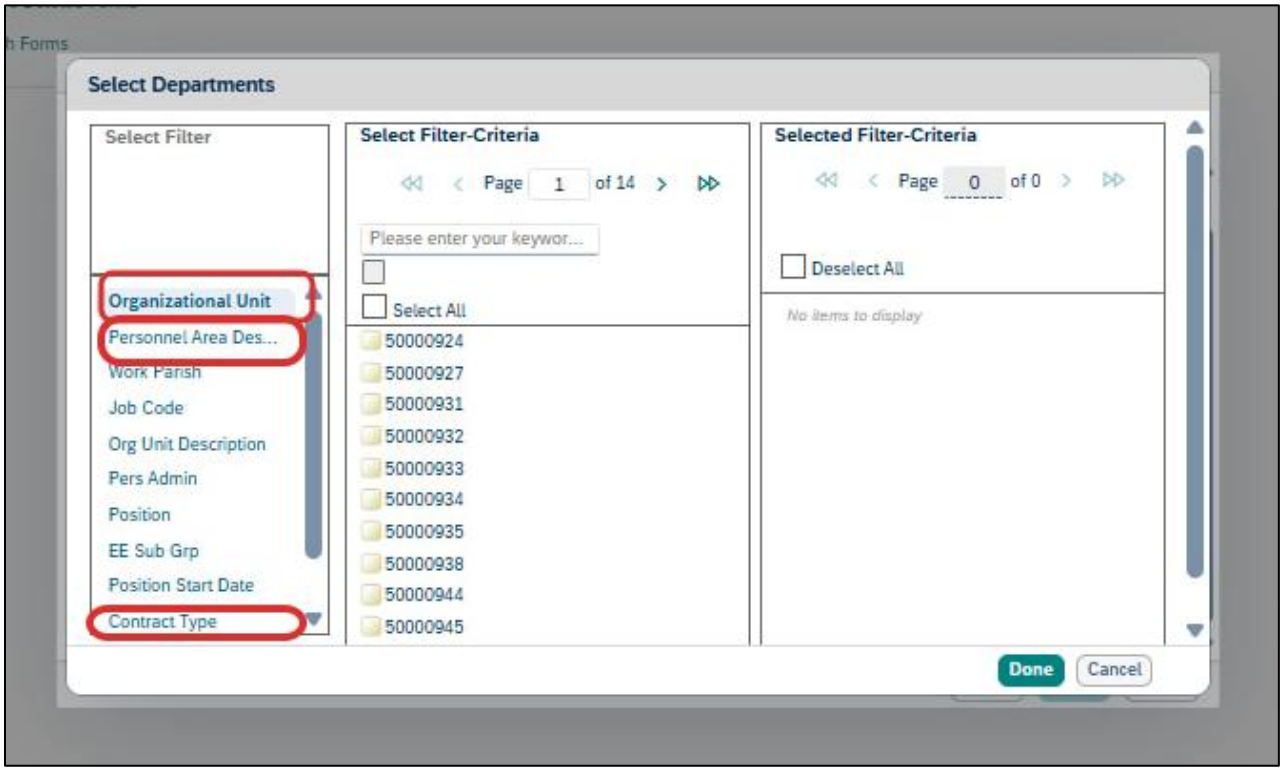


9. Select **Group of Employees**, then **Find employees by filters**, and then choose **Select Criteria**.

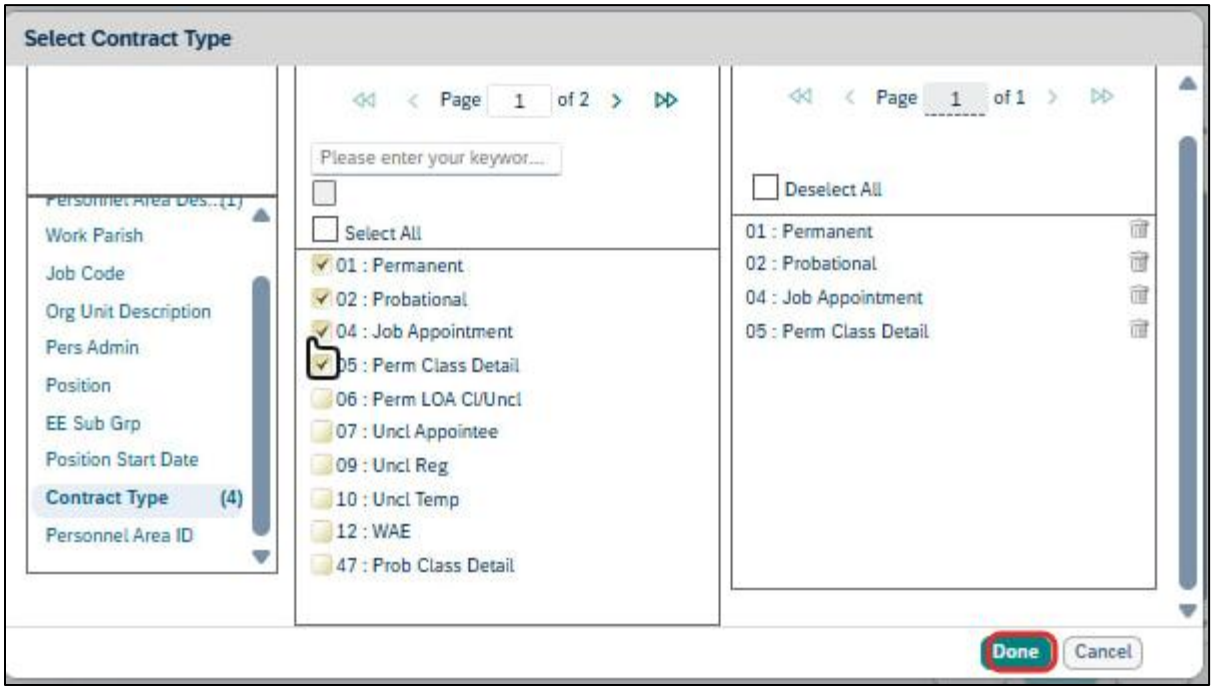


10. The **Select Departments menu** will open. You will select which categories to filter employees under **the Select Filters section.** Some common categories are:

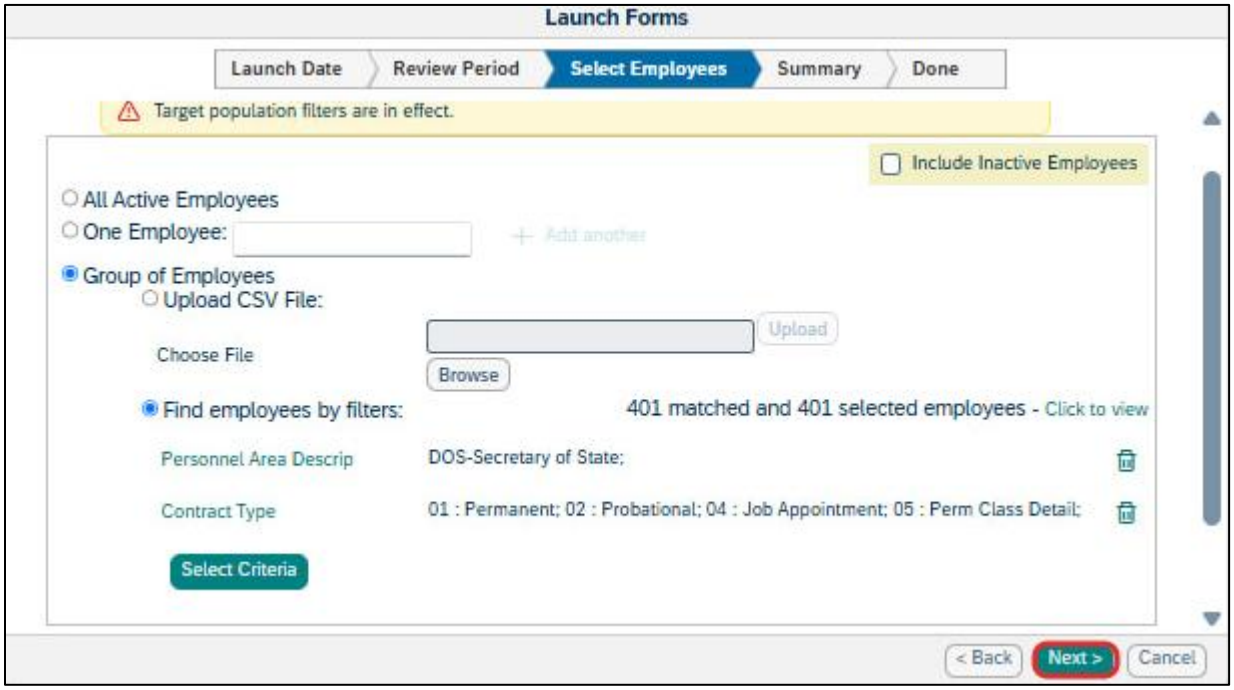
- Organizational Unit – Displays the description of the employee's organizational unit.
- Personnel Area Description – Description of the agency personnel area the employee is assigned to
- Contract Type - Denotes appointment types designated by State Civil Service. The contract types generally associated with the hiring of Program Support Agency employees are: CLASSIFIED EMPLOYEES – Probational, Permanent, Permanent Class Detail UNCLASSIFIED EMPLOYEES – Unclassified Appointee, Unclassified Regular, Unclassified Temporary, Board/Commission Appointment or Student Worker.
- Personnel Area ID- Agency identification created by LaGov (HCM) for all state agencies.



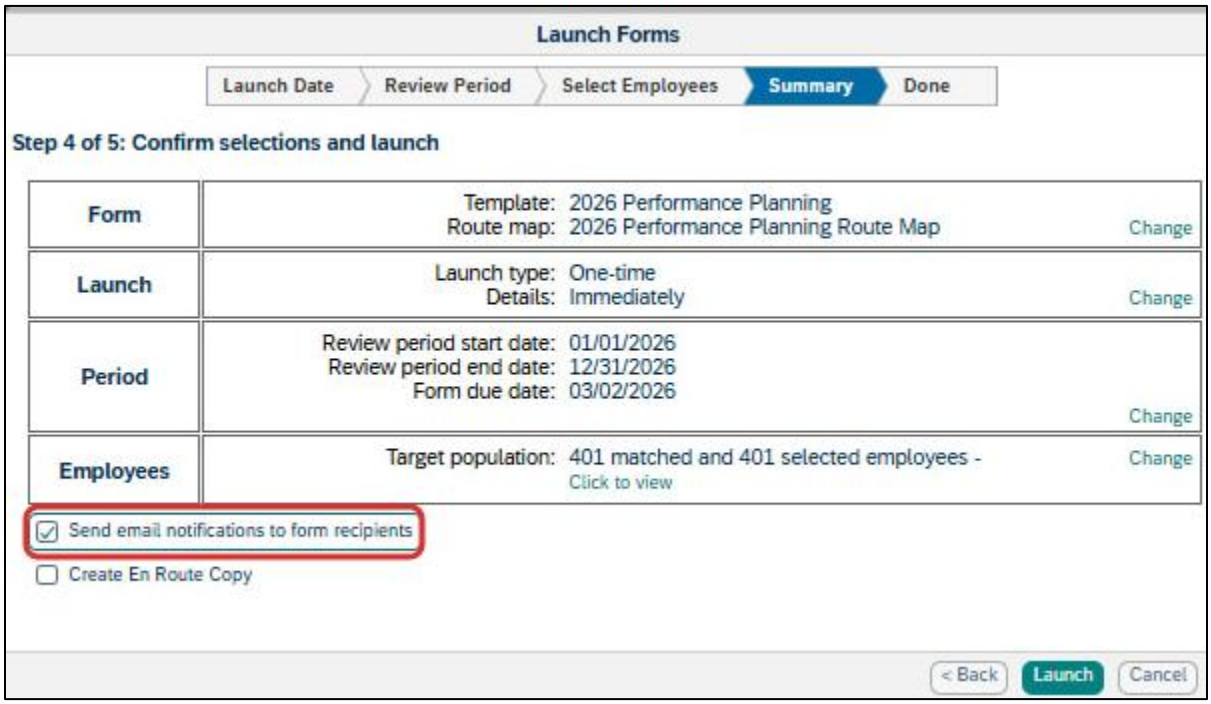
11.Once you make your selection, select **Done**.



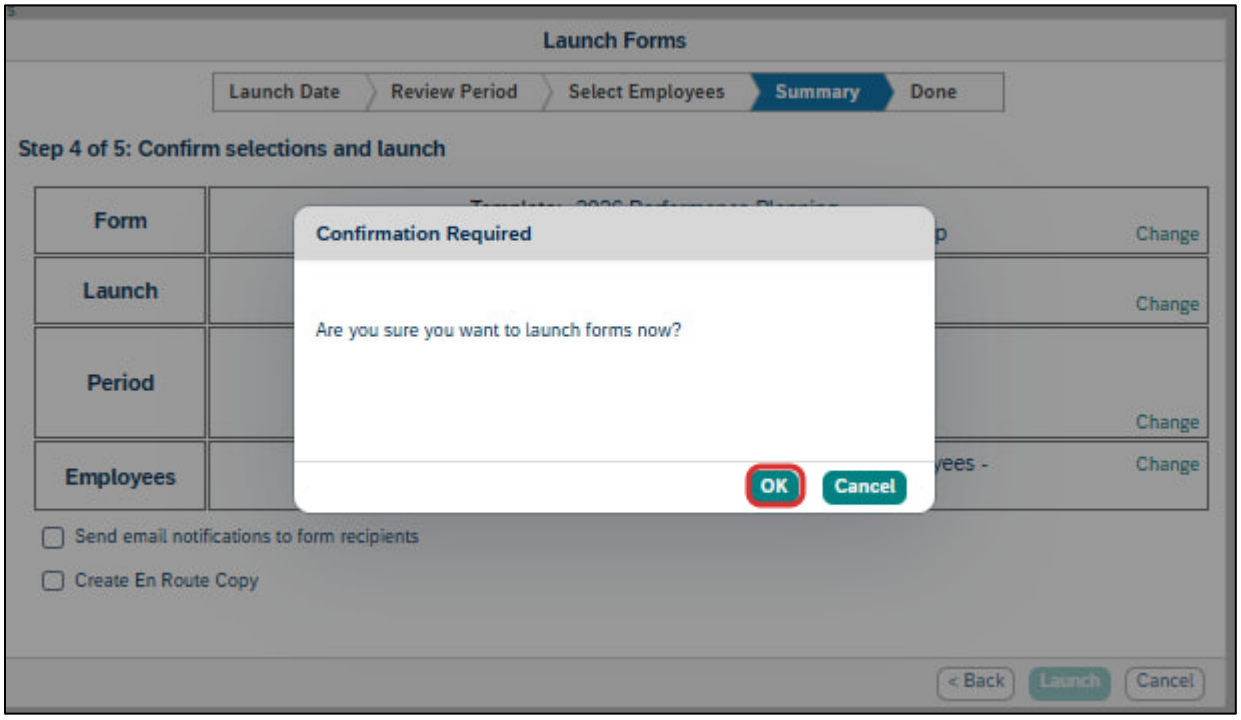
12. Select **Next**.



11. **Ensure that you check the “Send email notifications to form recipients” box. Click on "Launch Forms."**



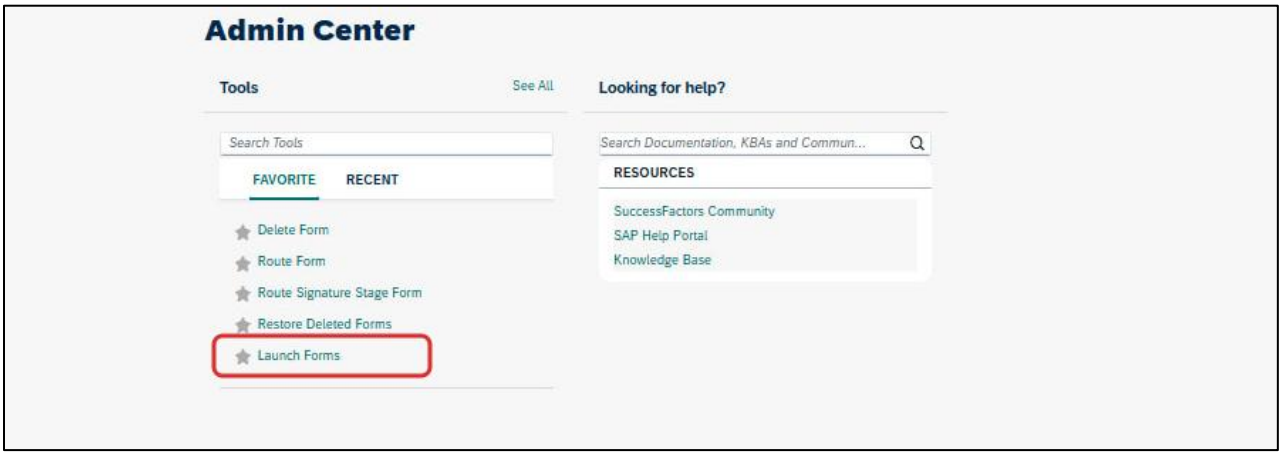
12. Confirm you want to launch forms now by clicking OK. Next, you will **see Form(s) creation is in progress**. Click **Close**.



Group of Employees

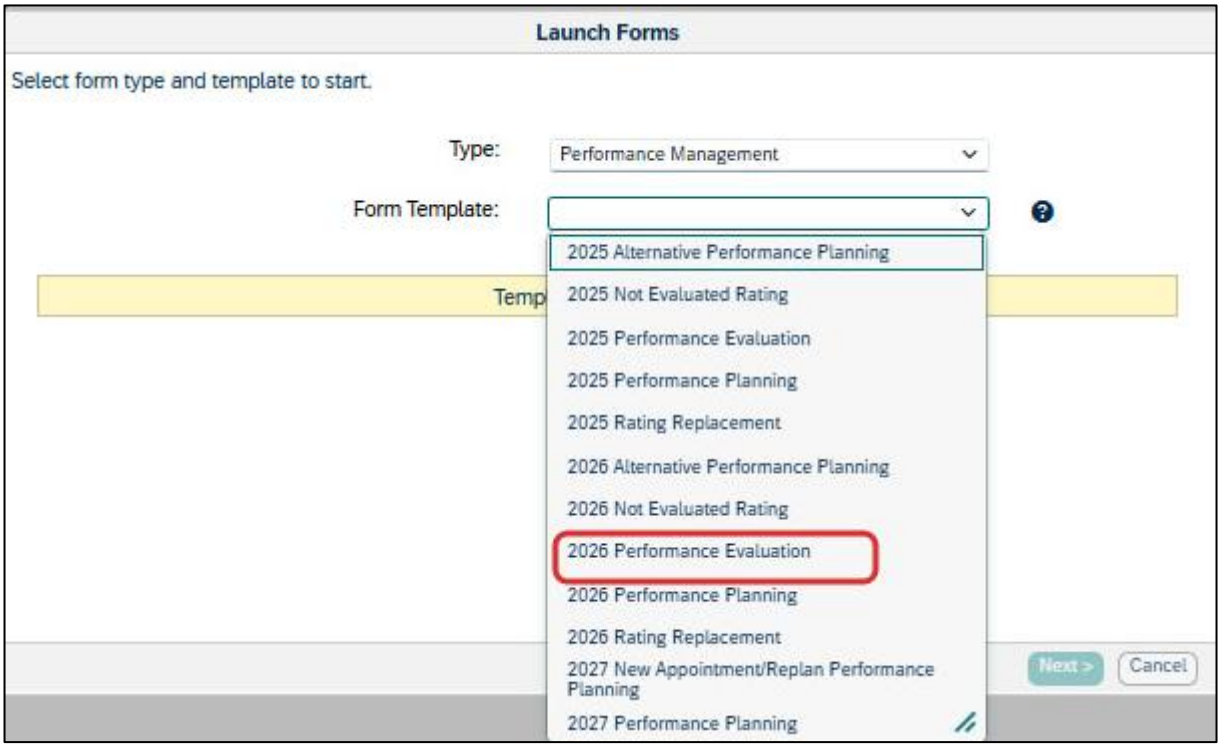
The process outlined below for launching any form needed for a group of employees using an CSV spreadsheet.

1. From the **Admin Center**, select **Launch Forms.**

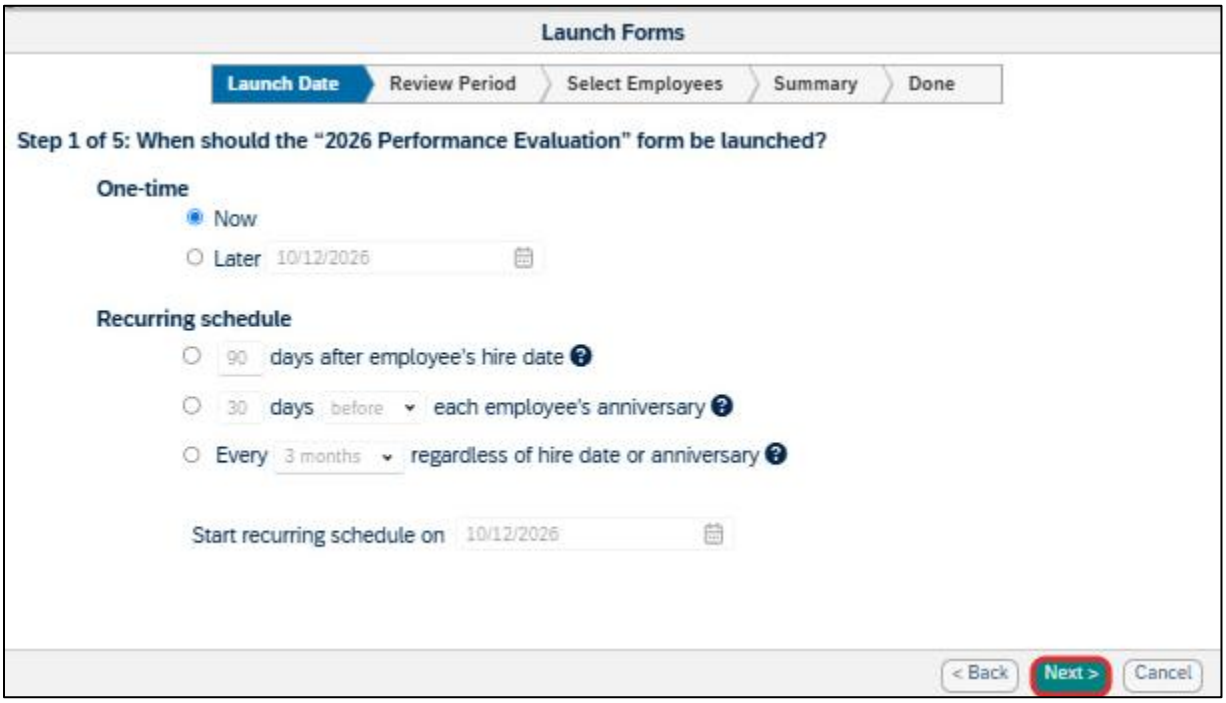


2. Choose the **correct form template.**

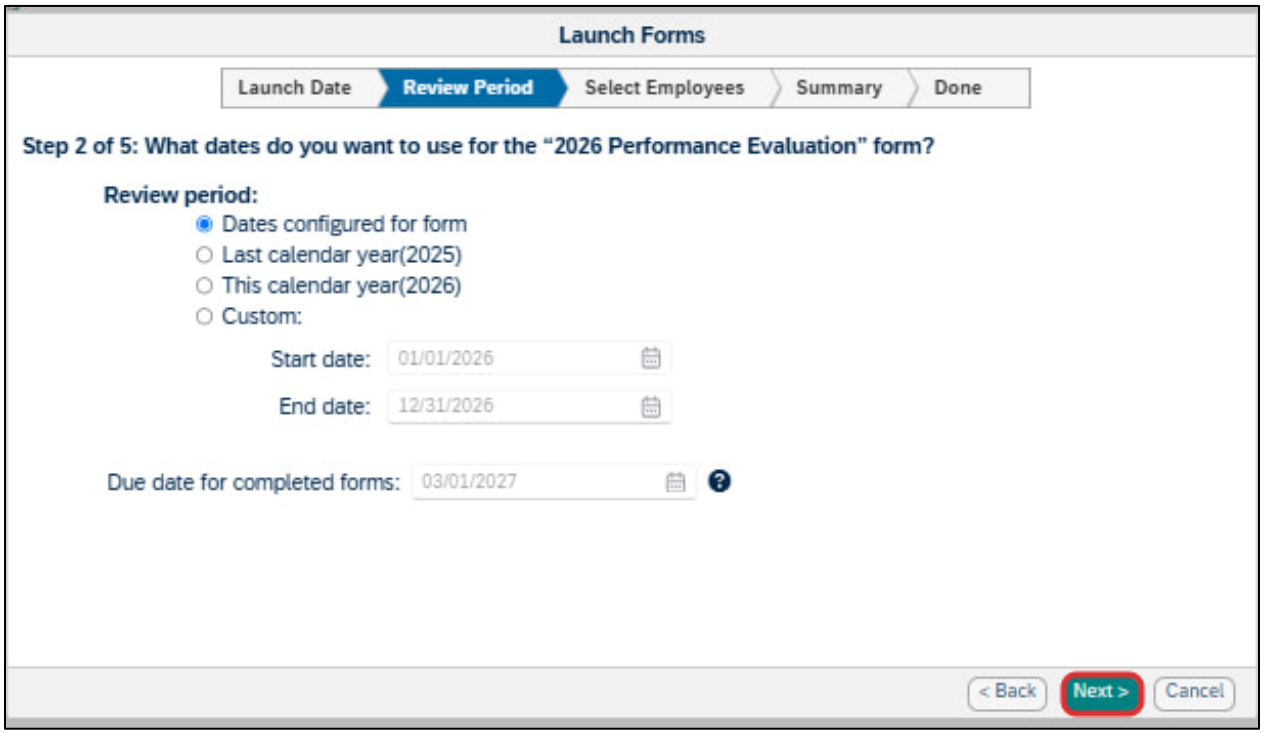
   NOTE: This example will use the 2026 Performance Evaluation form template.



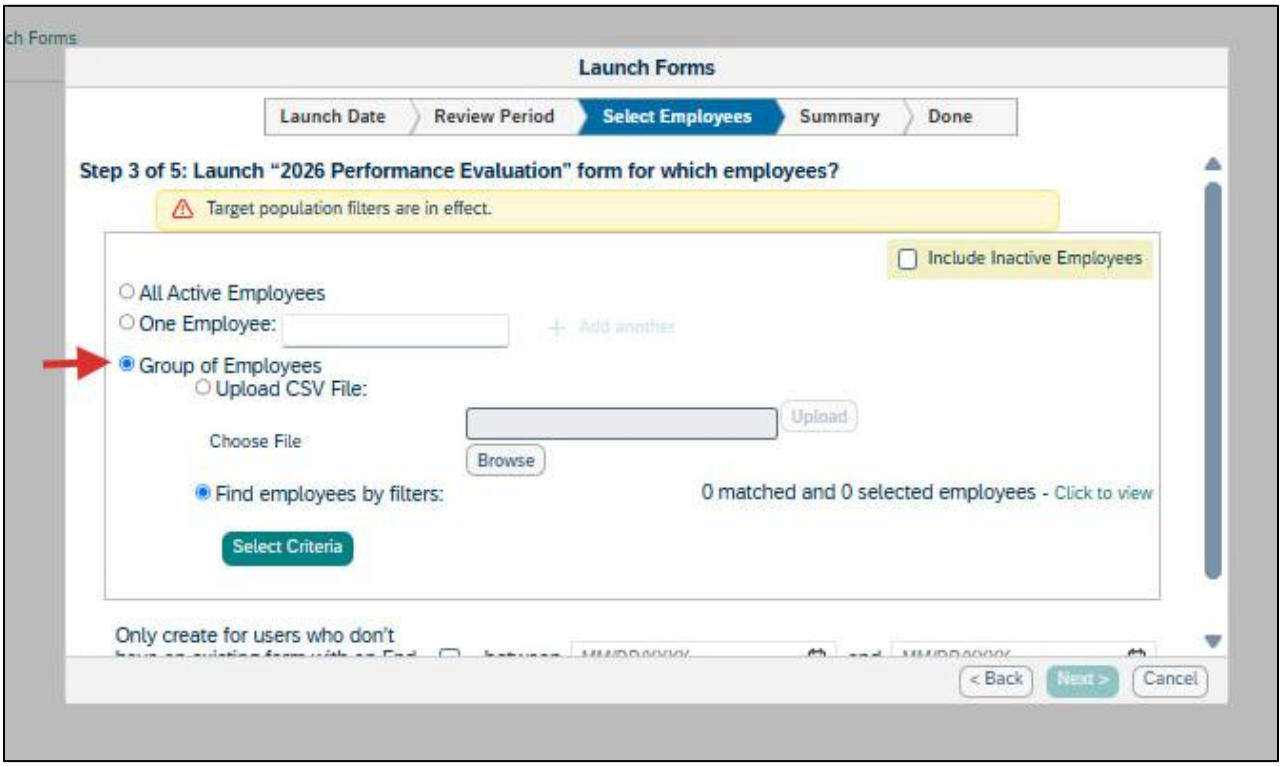
3. Use the **One-time – Now** default setting. Select **Next**.



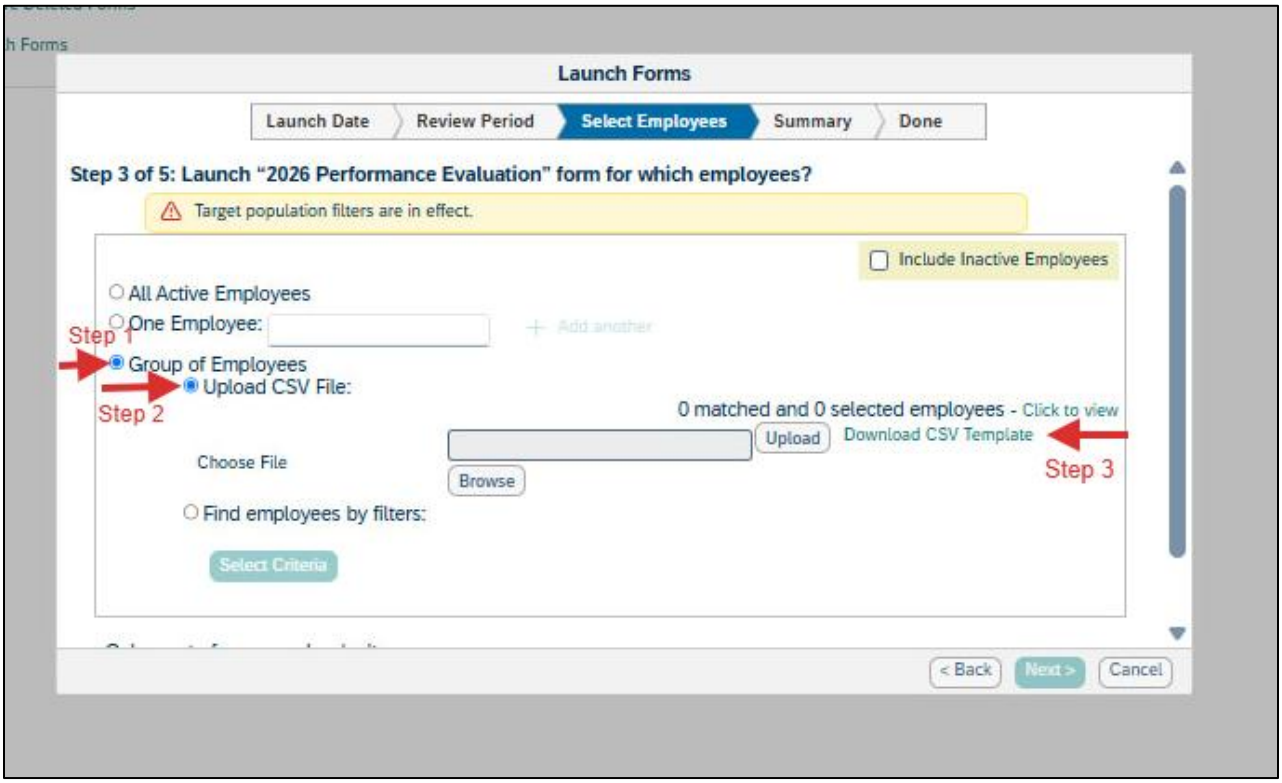
4. Use the **Dates configured for form** default setting. Select **Next**.



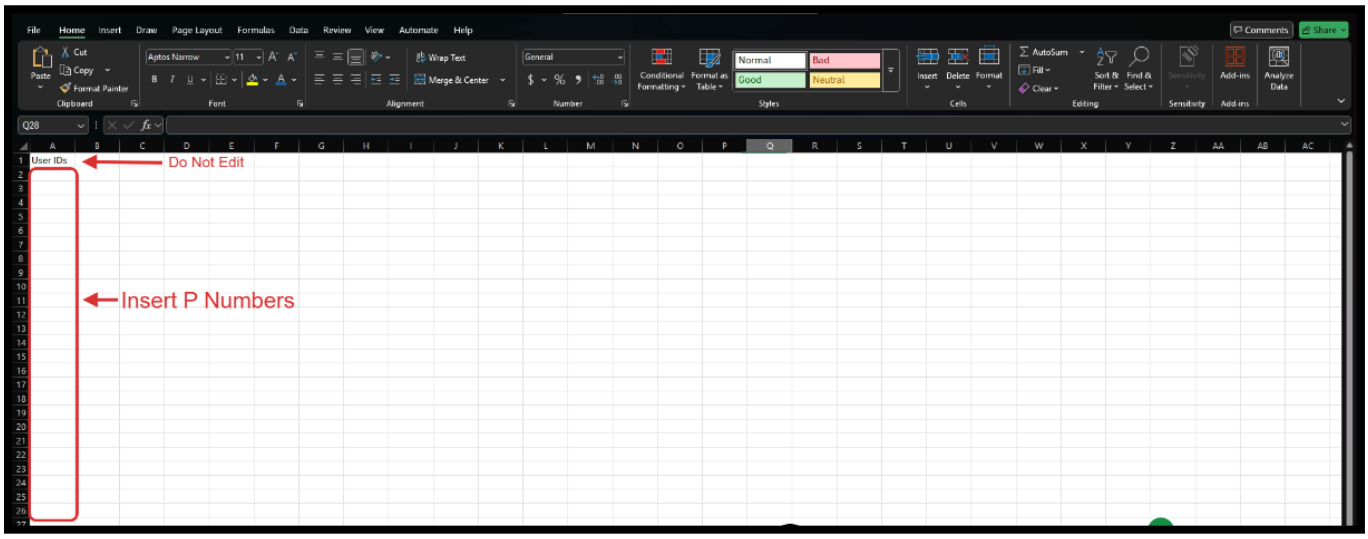
5. Select **Group of Employees**.



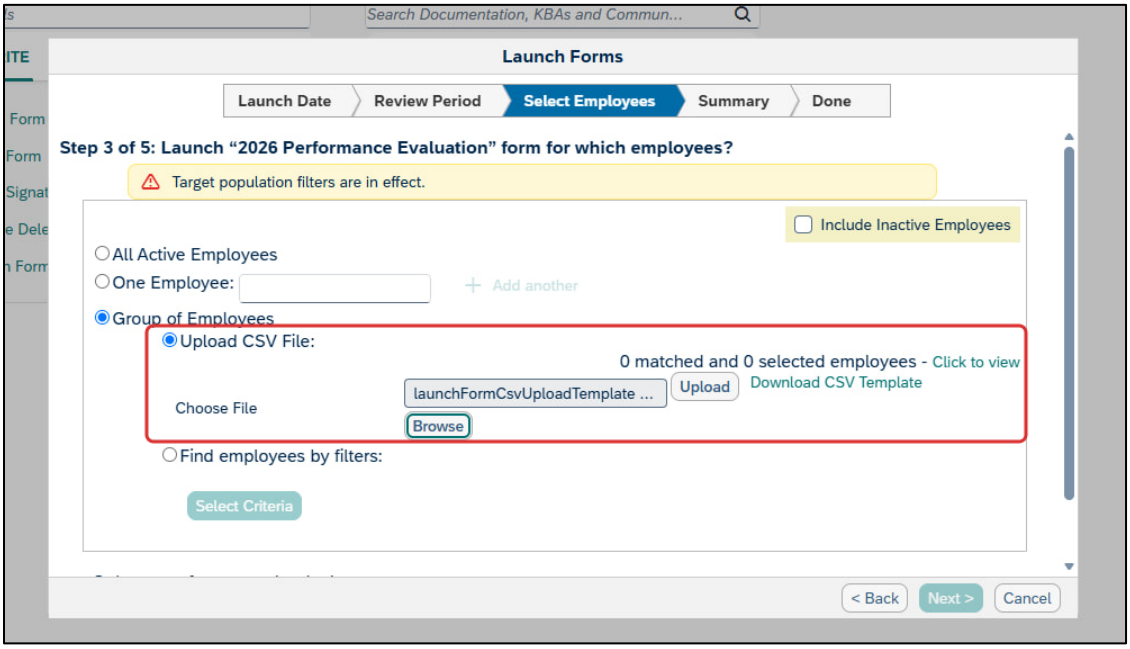
5. **Download the CSV Template.** Do not change the format of this template.



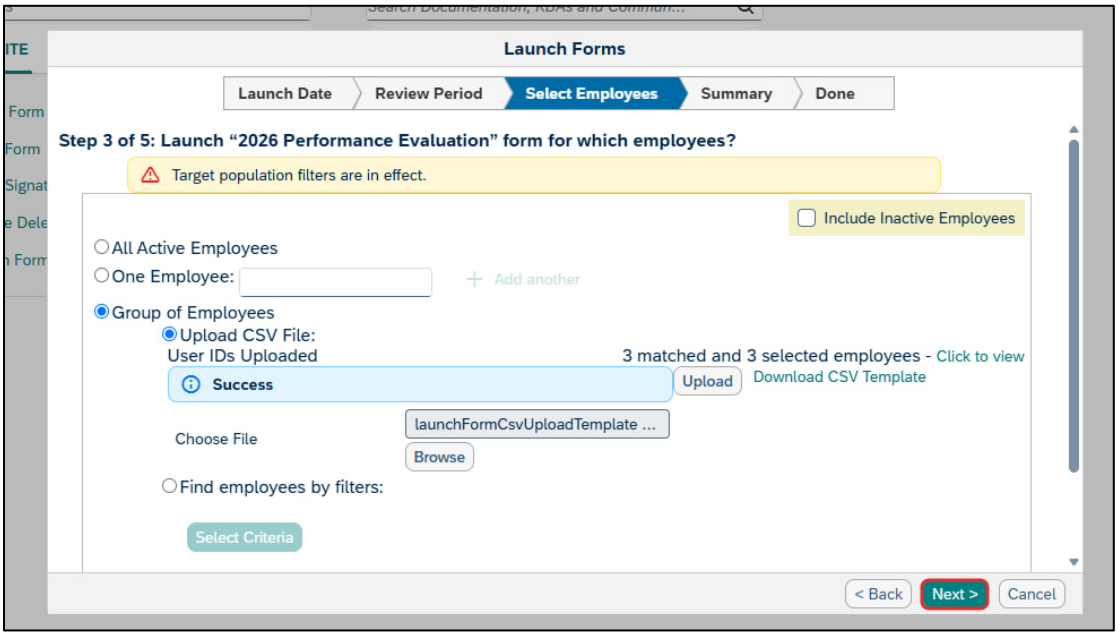
7. Insert the **P numbers** and **Save** the form.



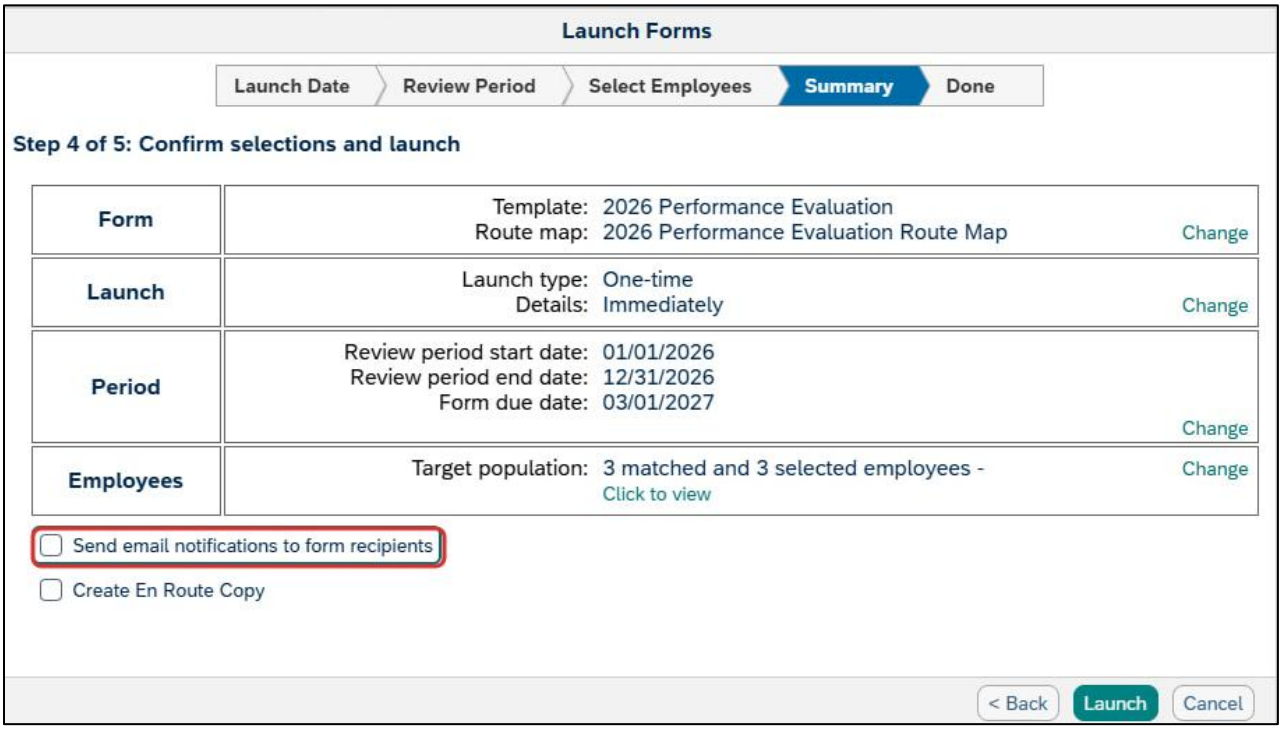
8. Upload the **CSV Template.**



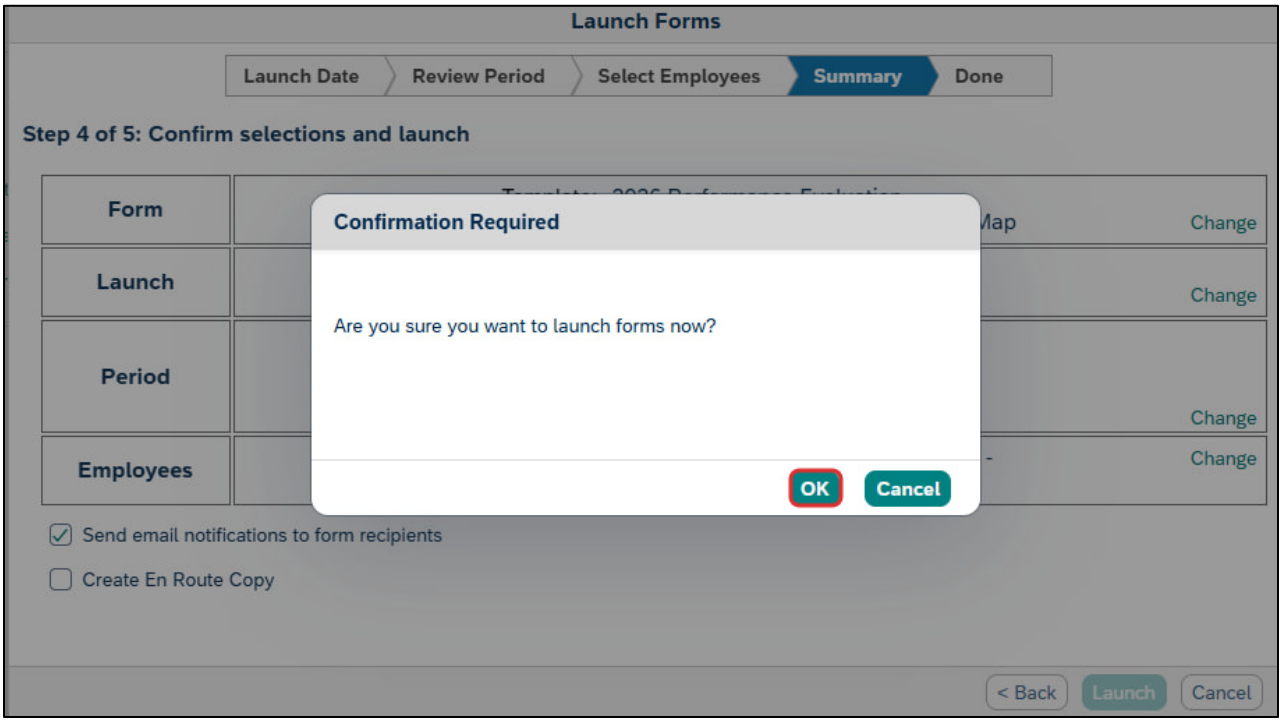
9. Select **Next**.



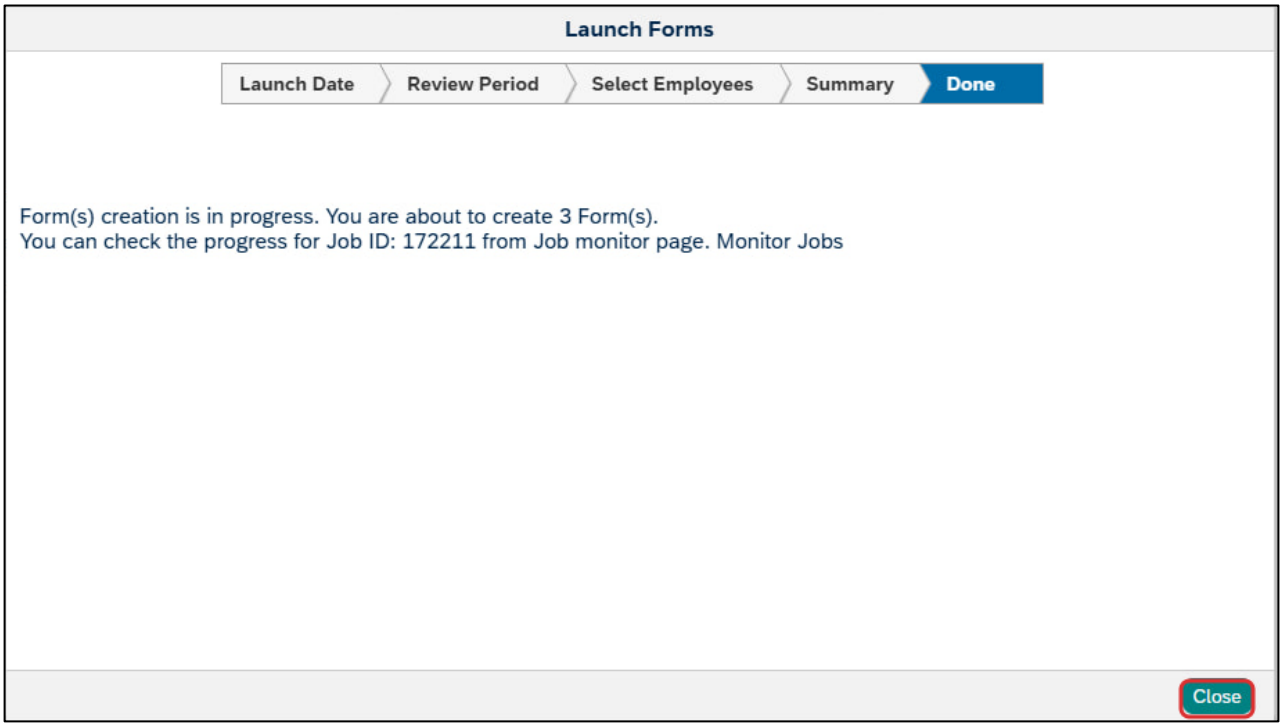
10. Make sure the **Send email notifications to form recipients box i**s checked and now **Launch** the form.



11.Confirm by selecting **OK**.



12. Click **Close**.

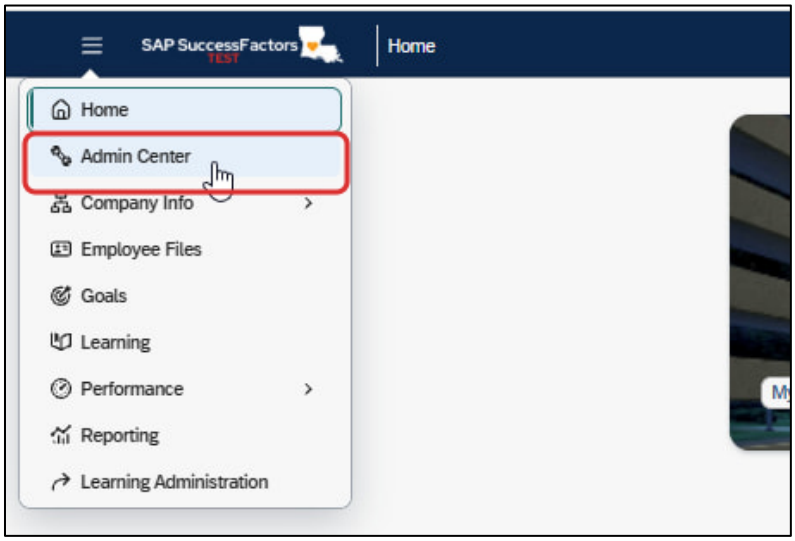


Form Management

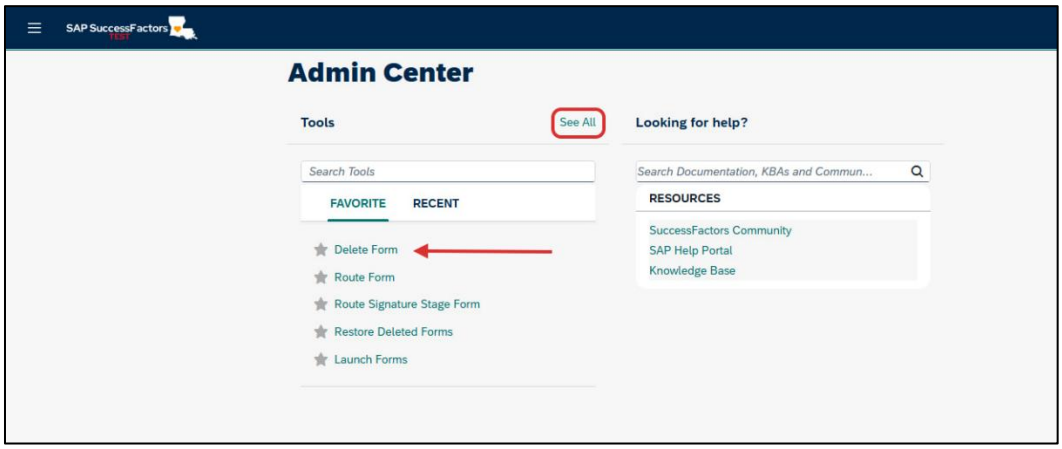
Form Management allows Agency Administrators to manage and troubleshoot performance planning and evaluation forms throughout the Continuous Performance Management (CPM) process. Using administrative tools in SuccessFactors, Agency Administrators can delete and restore forms, adjust routing, transfer forms to new supervisors, and manage document visibility. These functions help resolve issues, maintain accurate workflows, and ensure forms progress through the appropriate approval steps in accordance with SCS Chapter 10 Rules.

How to Delete a Form in SuccessFactors

1. From the **Main Menu**, go to the **Admin Center**.

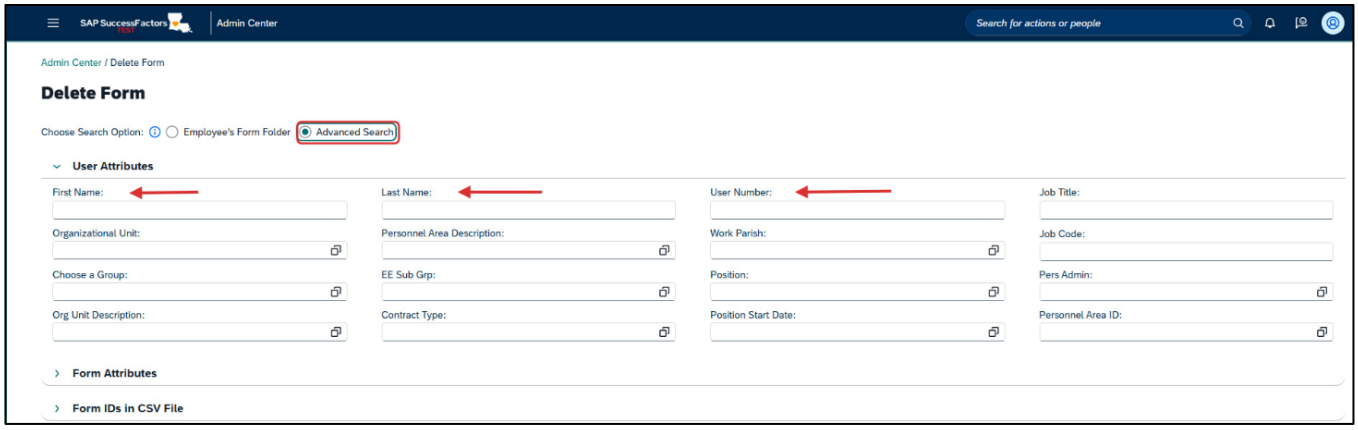


2. If you have not added this as a **Favorite**, click **See All**.

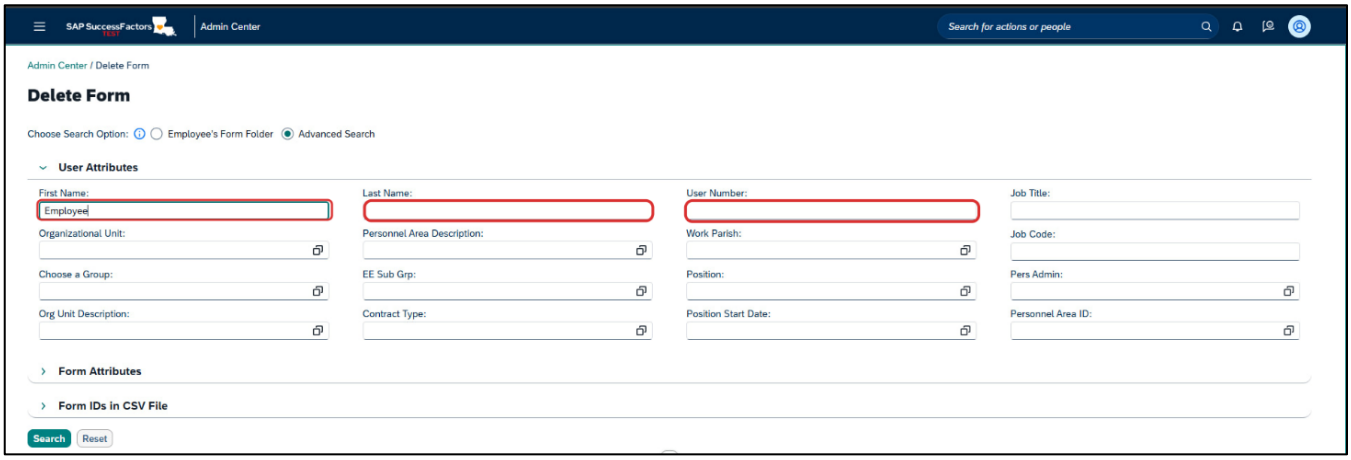


3. To search, you can either **search the Employee's Form Folder** or **Advanced Search**. (This example uses the Advanced Search method.)

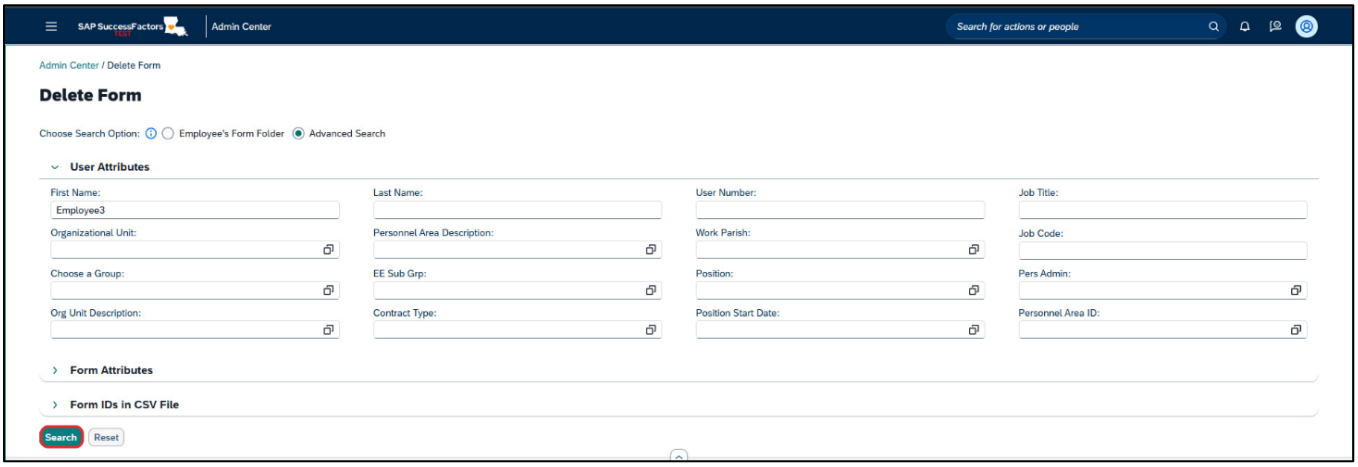
NOTE: Either method is acceptable. The information you have for the search criteria will help you decide which method to use. The **Advanced Search** allows you to search based on **User Attributes**, **Form Attributes**, or **Based on CSV Upload**.



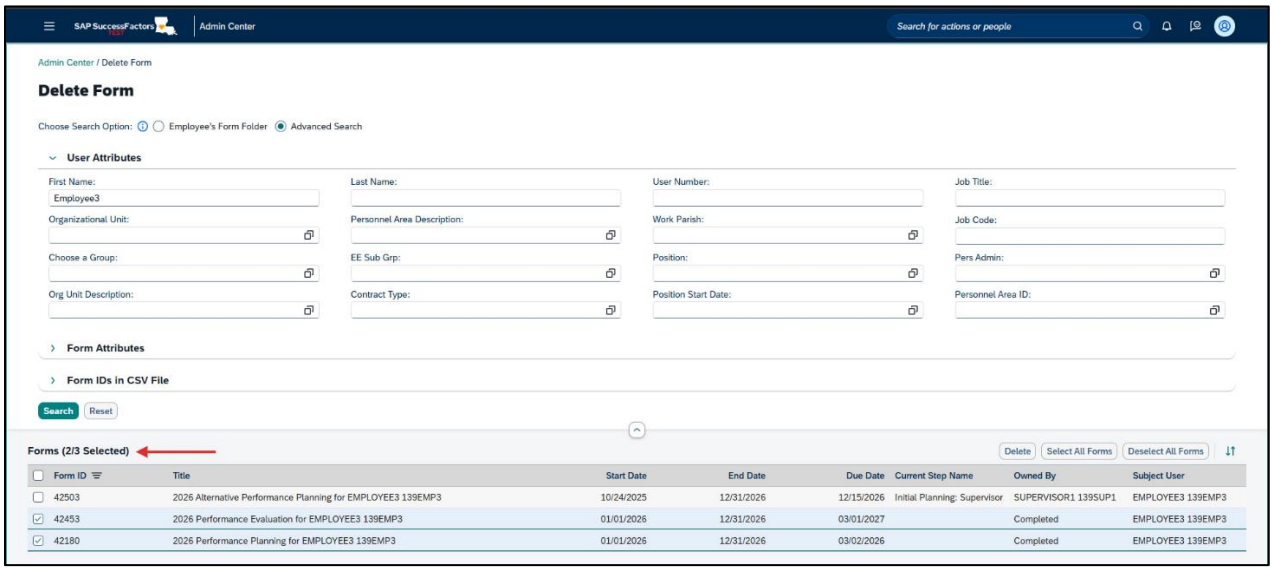
4. Enter the employee's **First Name**, **Last Name**, or **User Number (P#)** in the search fields.



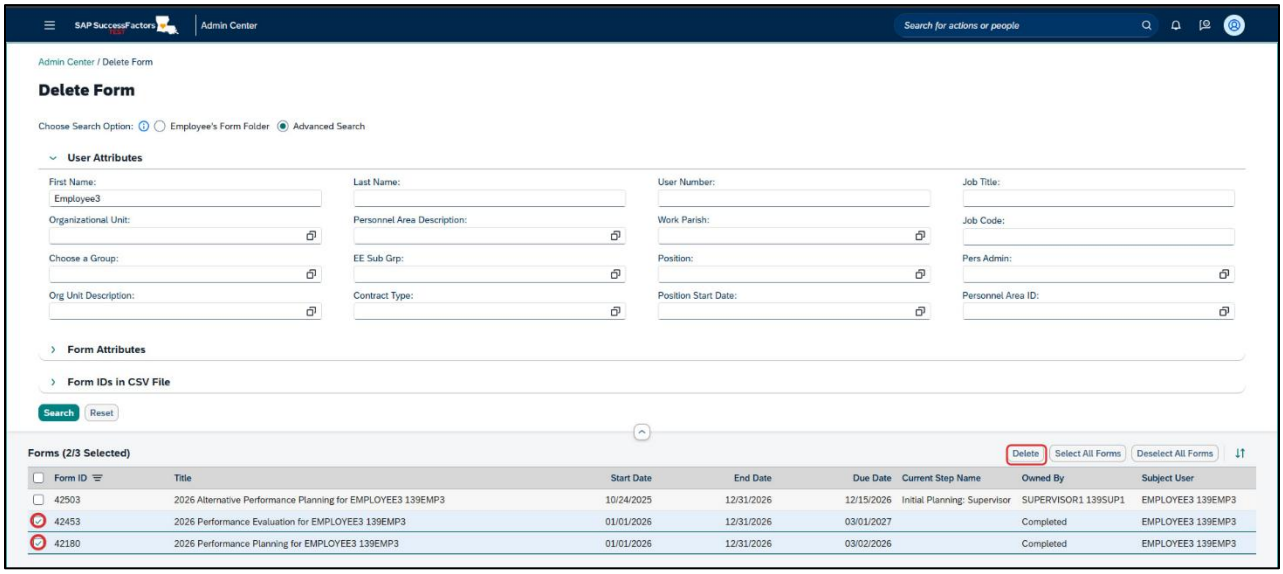
5. Select **Search** to display all forms associated with the employee.



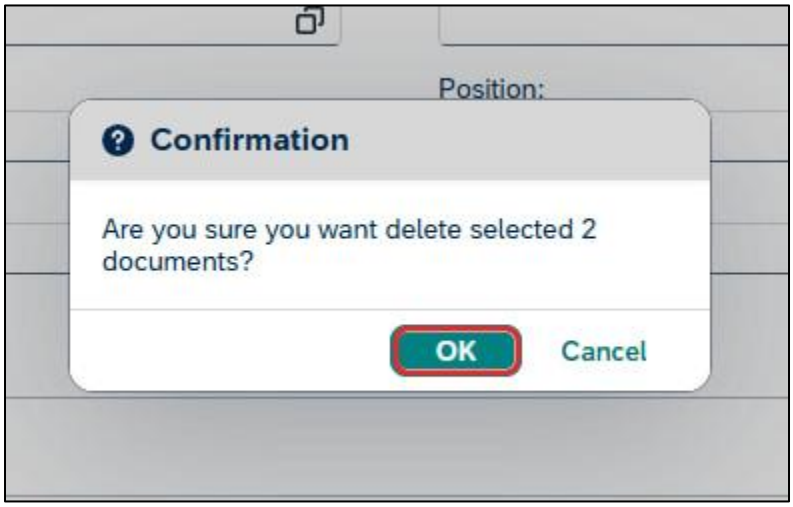
6. Locate the correct form in the results and confirm the Form ID matches the file you want to delete. **Check the box next to the correct form.**



7. Click **Delete**.

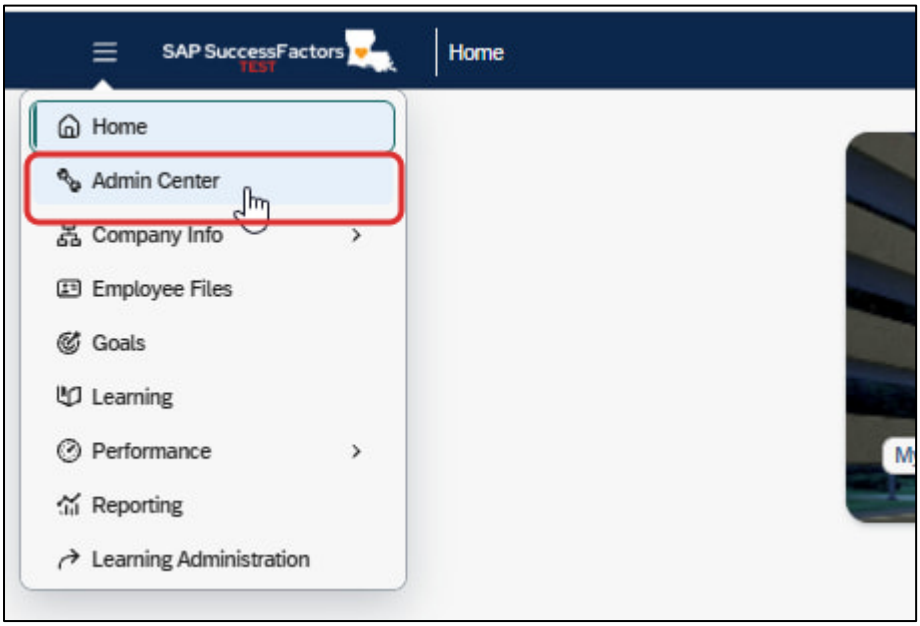


8. Confirm your deletion by selecting **Yes** when prompted.

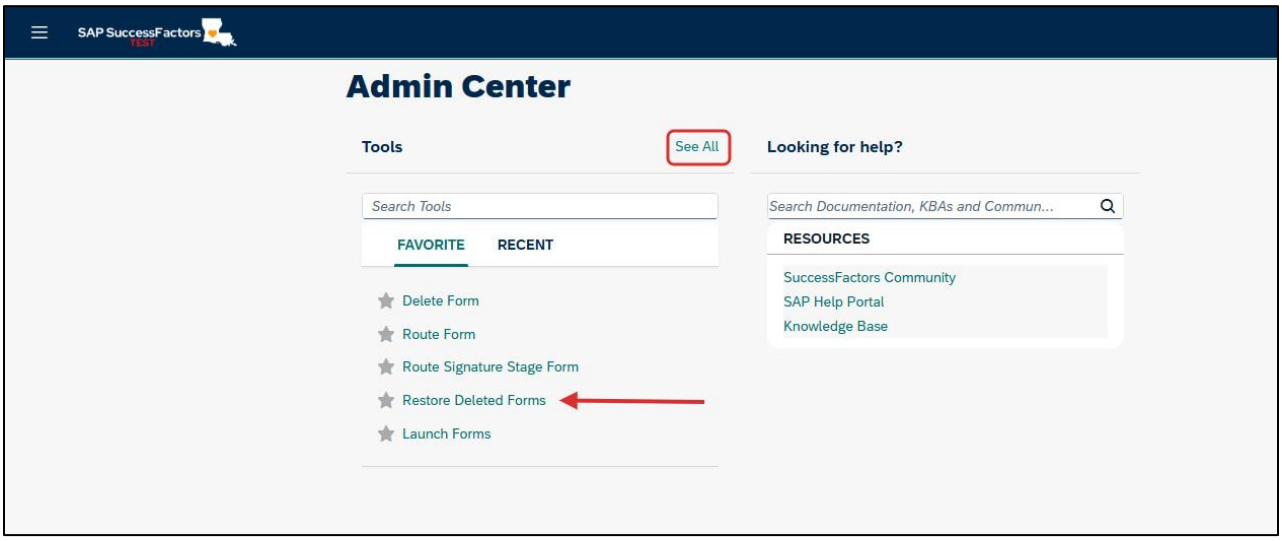


How to Restore a Deleted Form

1. From the **Main Menu**, go to the **Admin Center**.

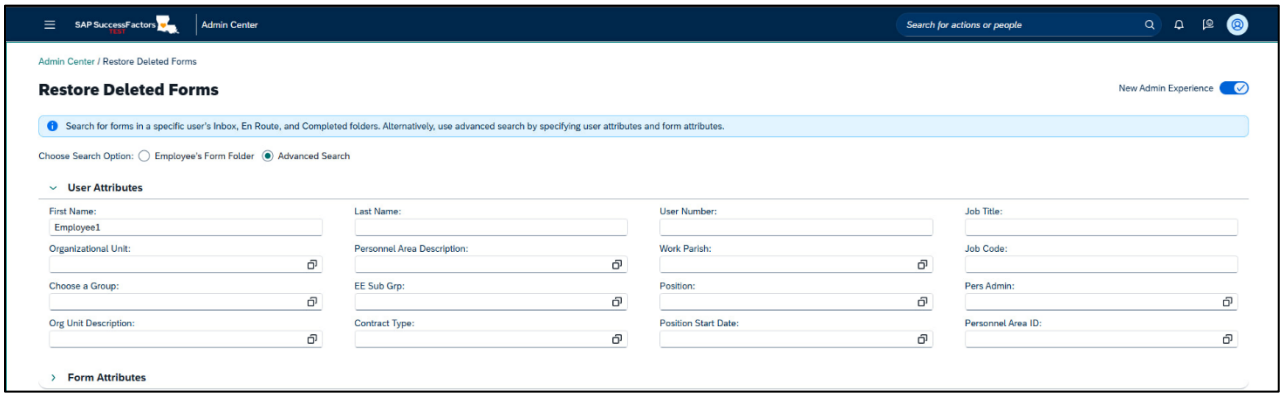


2. Click on **Restore Deleted Forms**.

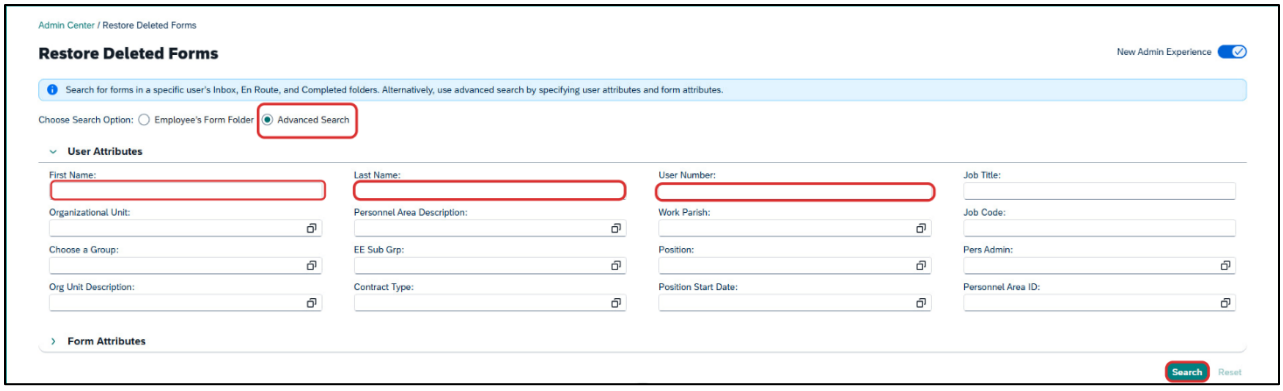


3. To search, you can either **search the Employee's Form Folder** or **Advanced Search**. (This example uses the Advanced Search method.)

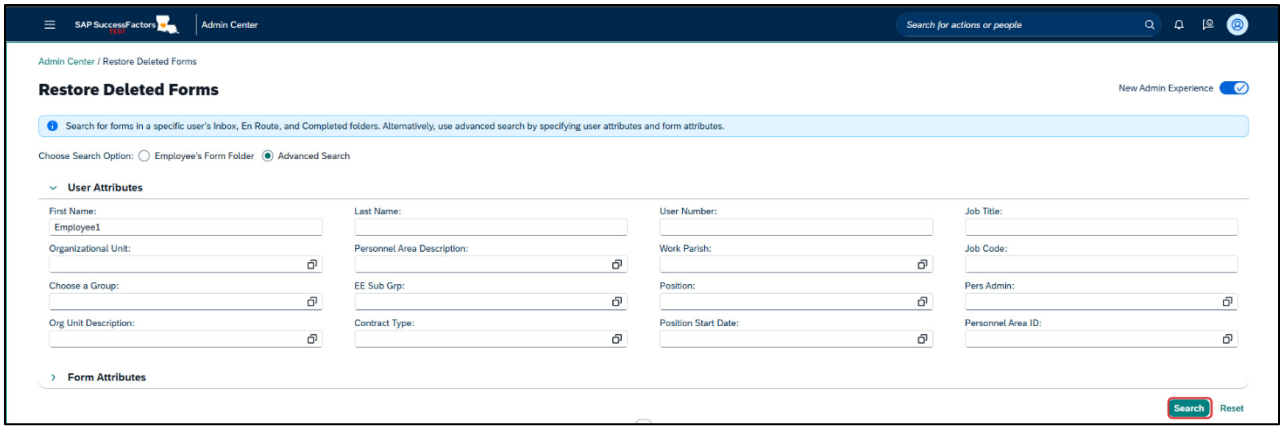
NOTE: Either method is acceptable. The information you have for the search criteria will help you decide which method to use. The **Advanced Search** allows you to search based on **User Attributes**, **Form Attributes**, or **Based on CSV Upload**.



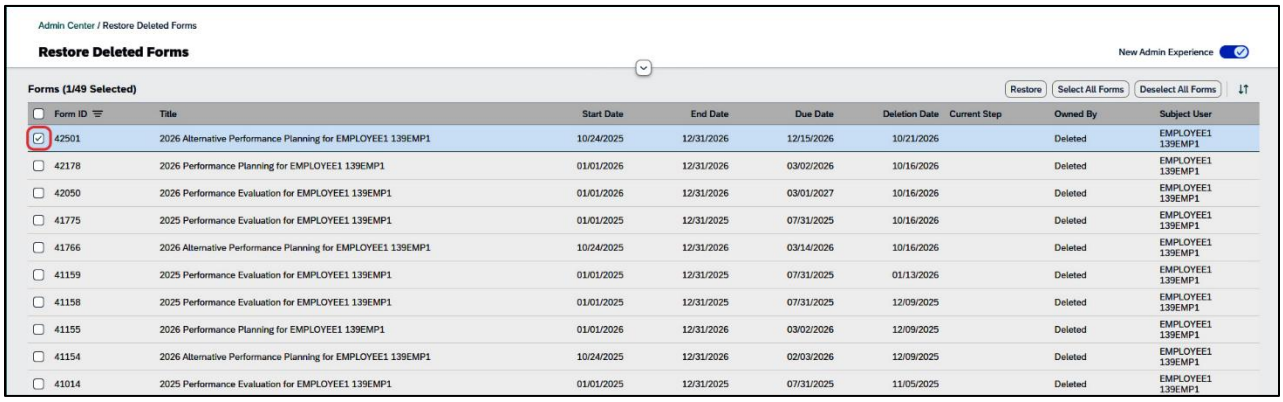
4. **Enter the employee's First Name, Last Name or User Number (P#) in the search fields.**



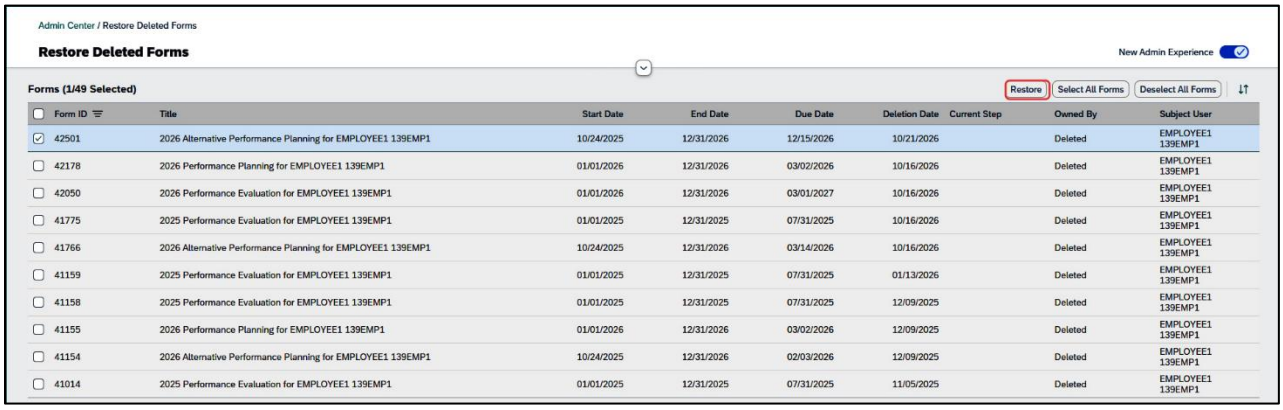
5. Select **Search** to display all deleted forms associated with the employee.



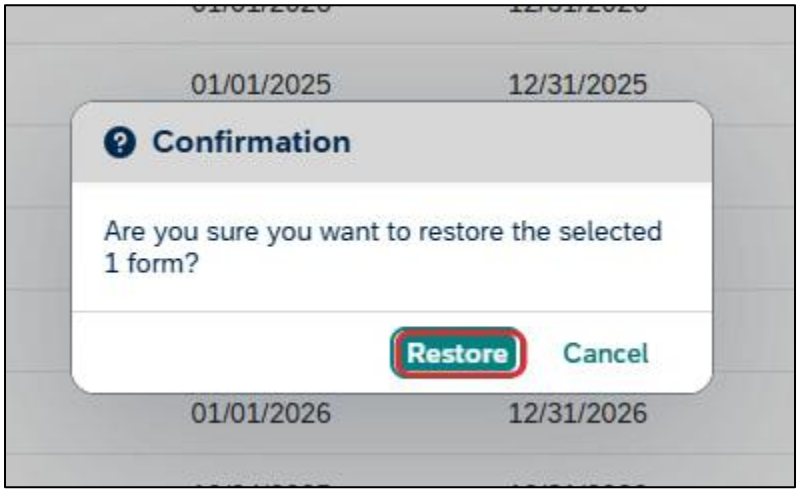
6. Locate the correct form in the results and click the **Form ID t**o confirm it matches the file you want to restore. **Check the box next to the correct form.**



7. Click **Restore**.

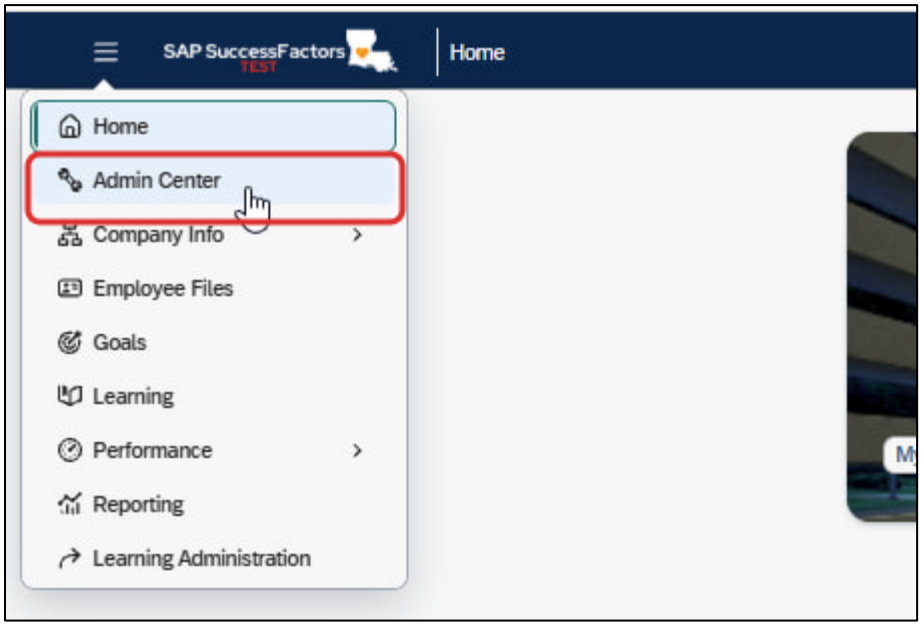


8. Confirm the action by selecting **Yes** when prompted.

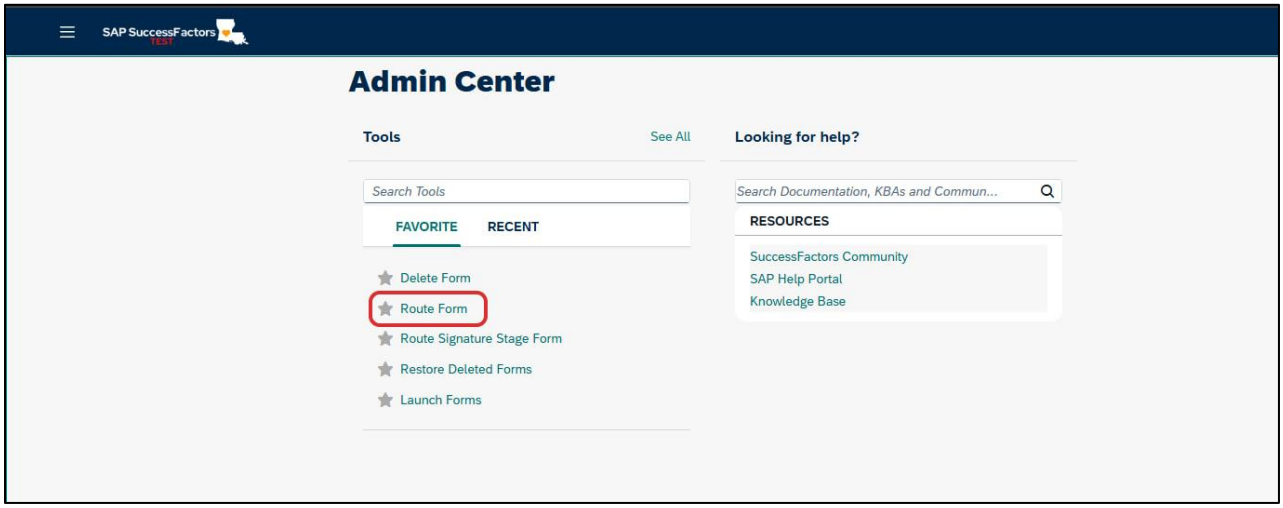


How to Route a Form

1. From the **Main Menu**, go to the **Admin Center**.



2. Select **Route Form** from the **Tools** menu.

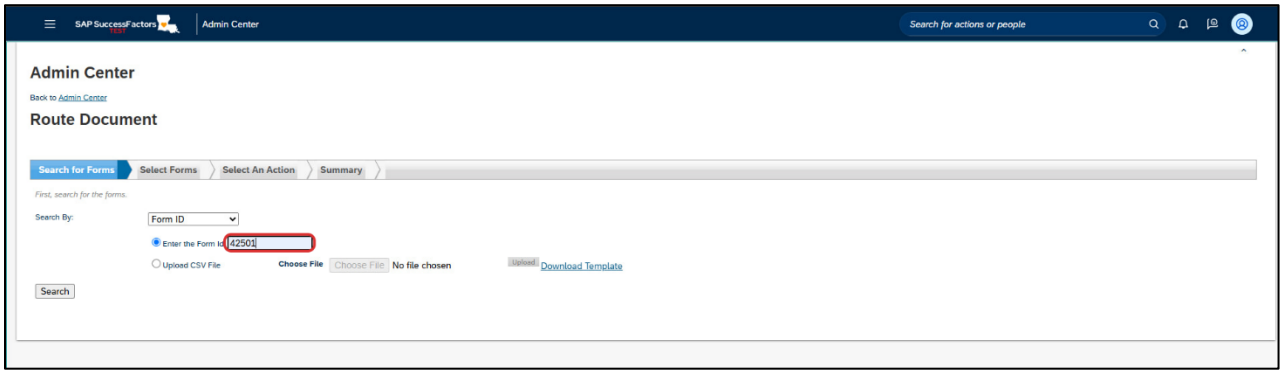


3. **You have multiple options to search for the form you want to route.)This example will demonstrate using the Form ID.)**

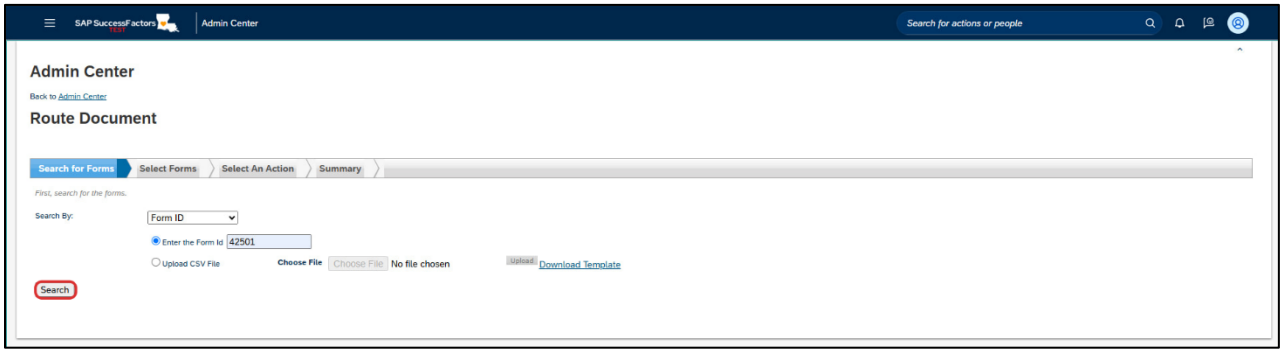
   NOTE: Search options include:

   - **Form ID** - Allows you to search for a specific form by the Form ID.
   - **Form Template** - Allows you to see all forms for the type selected. (Ex: 20XX Performance Planning, 20XX Performance Evaluation, 20XX Not Evaluated.)
   - **Employee's Folder** - Allows you to see all forms in an individual's folder.
   - **Subject User** - Allows you to search for all forms for one individual.

4. Enter the **Form ID number. (Or search by Employee, Subject User, or CSV).**

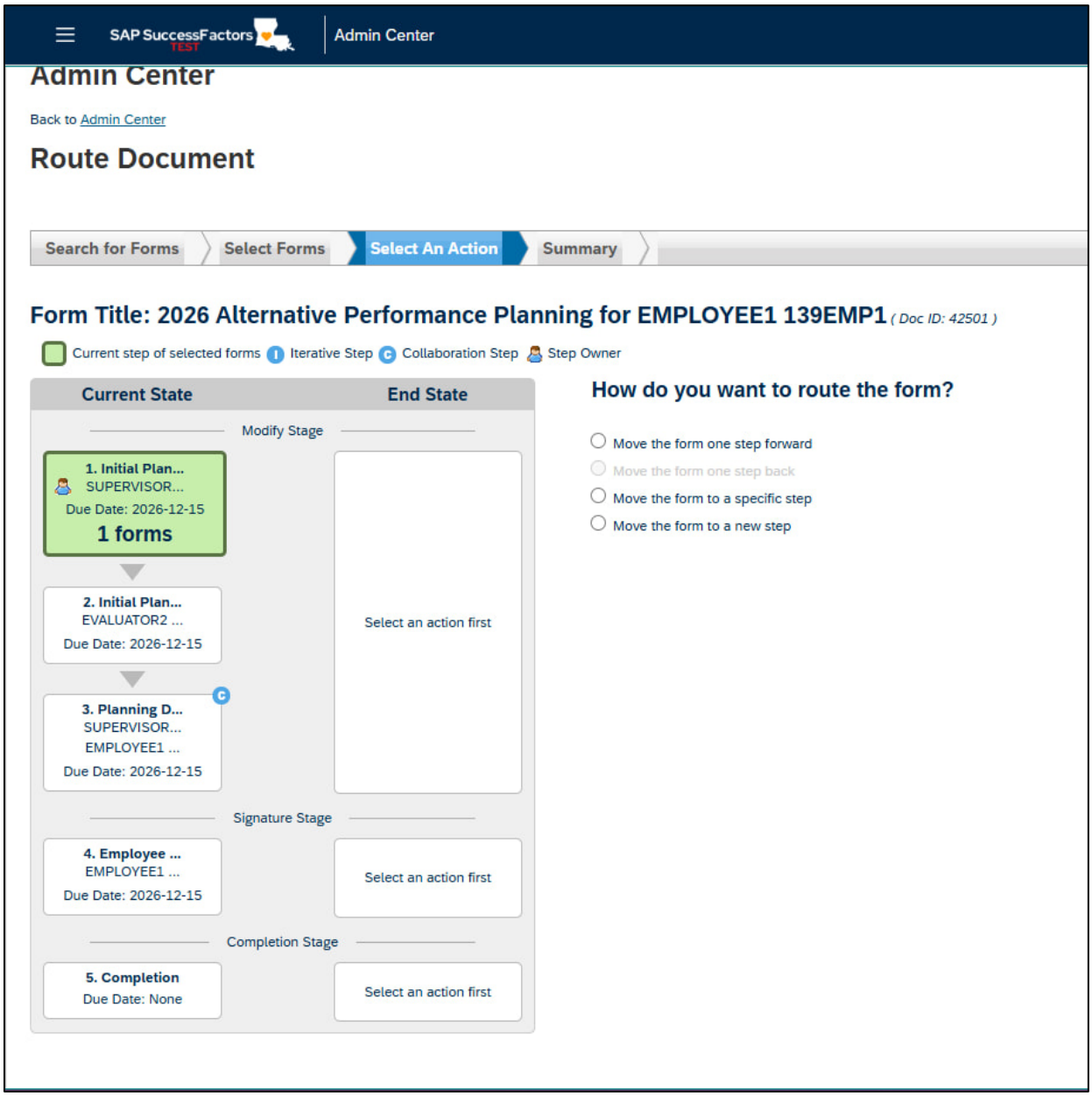


5. Click **Search.**



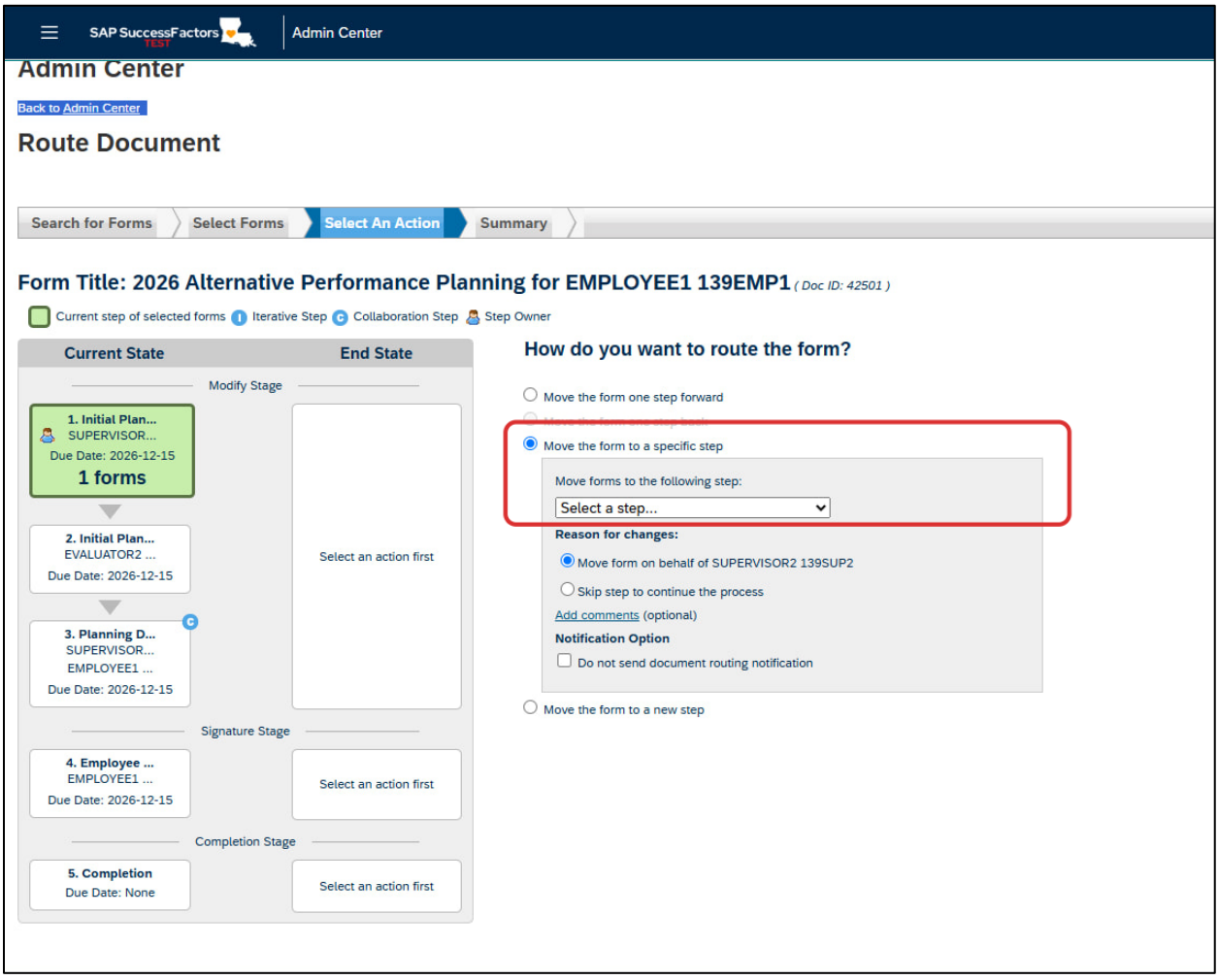
6. Answer the question **“How do you want to route the form?”** by selecting one of 3 options:
    - **Move the form one step back**
    - **Move the form to a specific step**
    - **Move the form to a new step**

NOTE: This example routes the form to a specific step. The selections are similar for all routing choices.

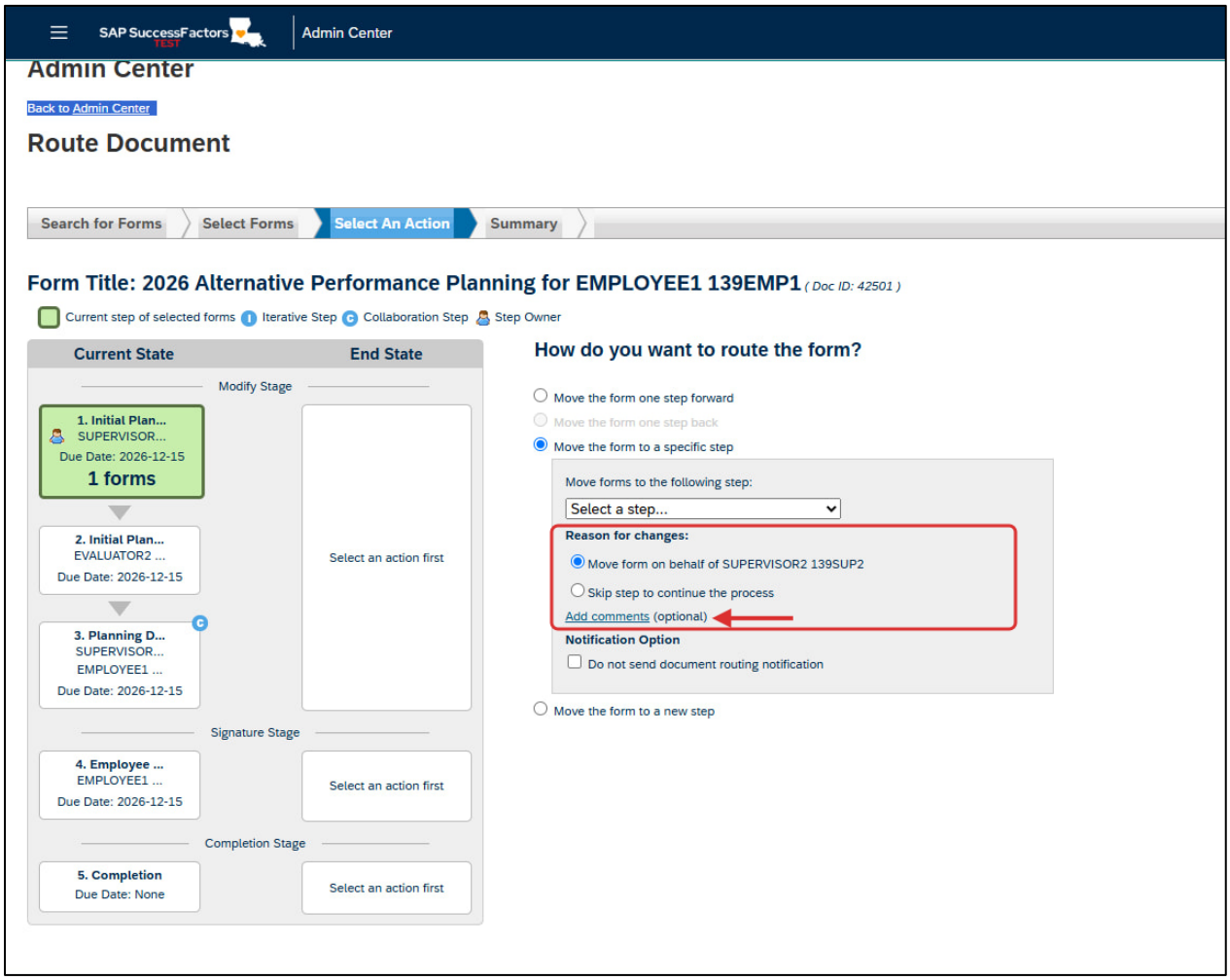


7. **Once you have selected how you want to route the form, use the drop-down menu to select the correct step.**

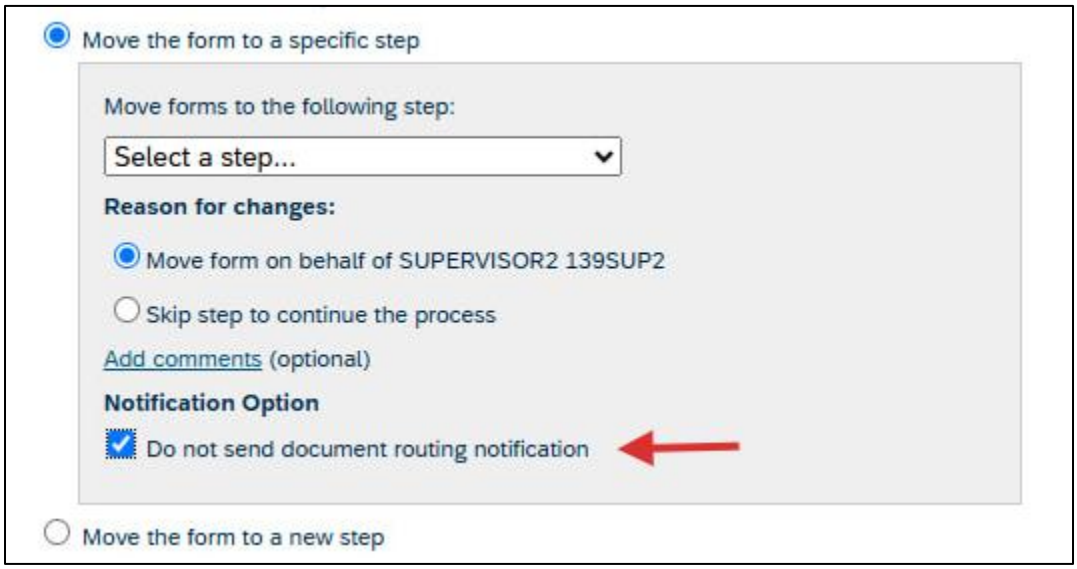
NOTE: Use the graphic on the left to help you identify the correct step in the Route Map.



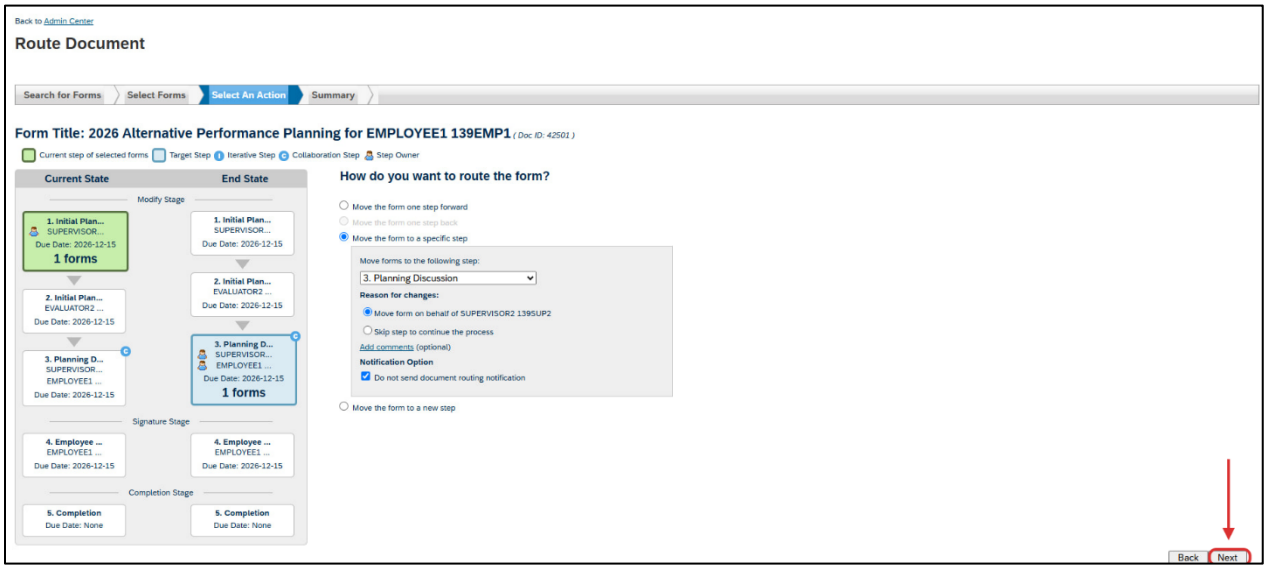
8. Select a **Reason for changes.** You may want to click on **Add Comments** to enter a brief justification for the routing action.



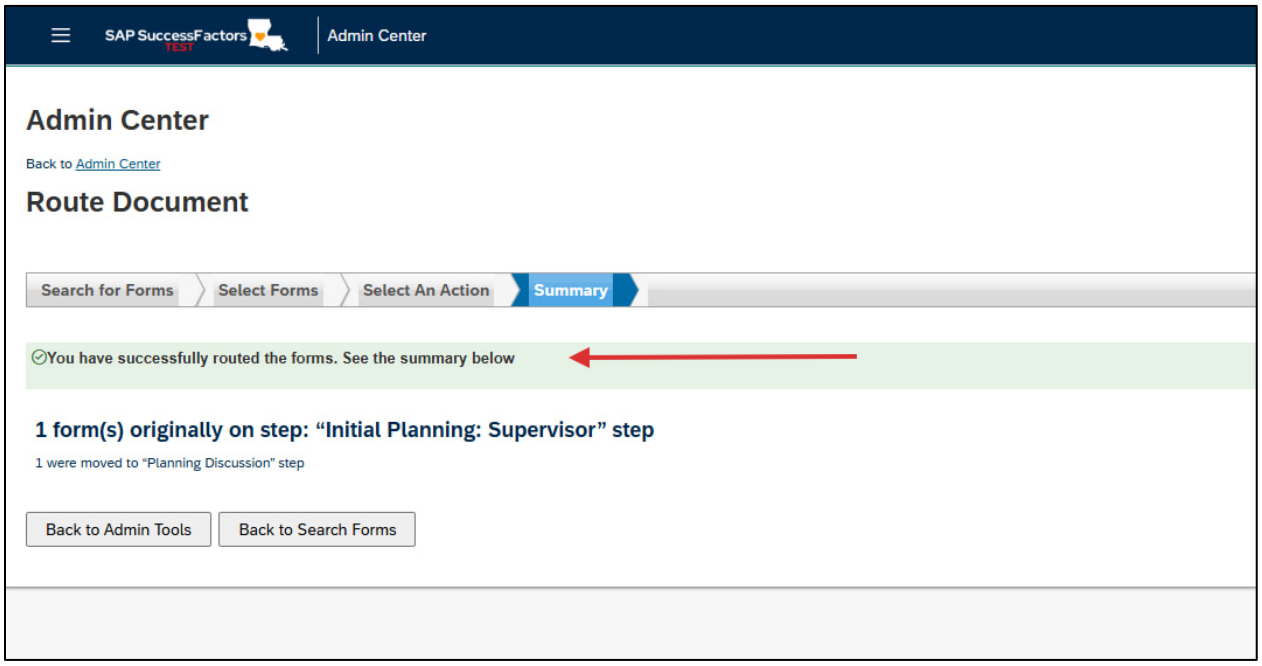
9. Select a **Notification Option**. If you do not want to send a notification, click **Do not send document routing notification.**



10. Click **Next.**

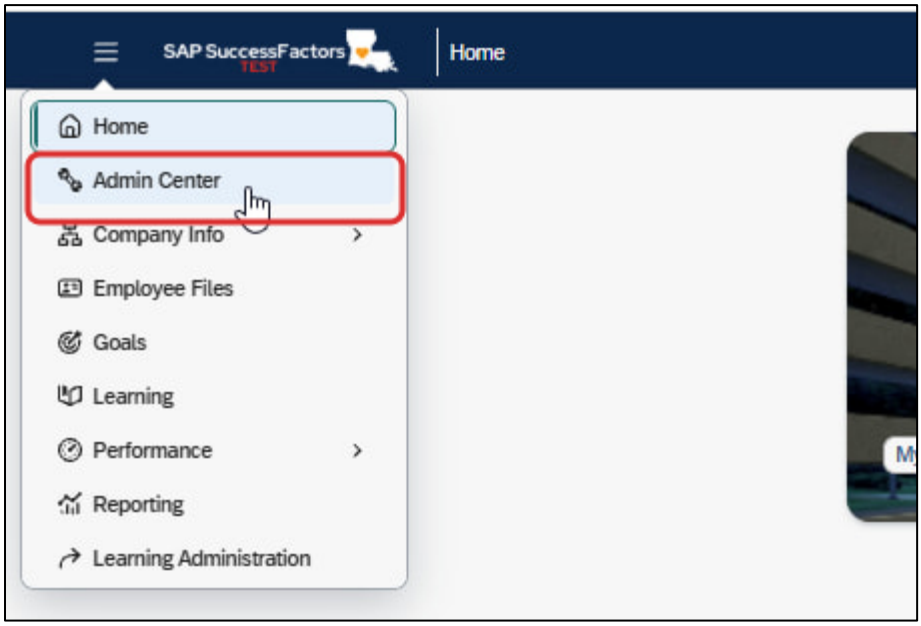


11. A confirmation message will display, showing the number of forms successfully routed (and any that failed).

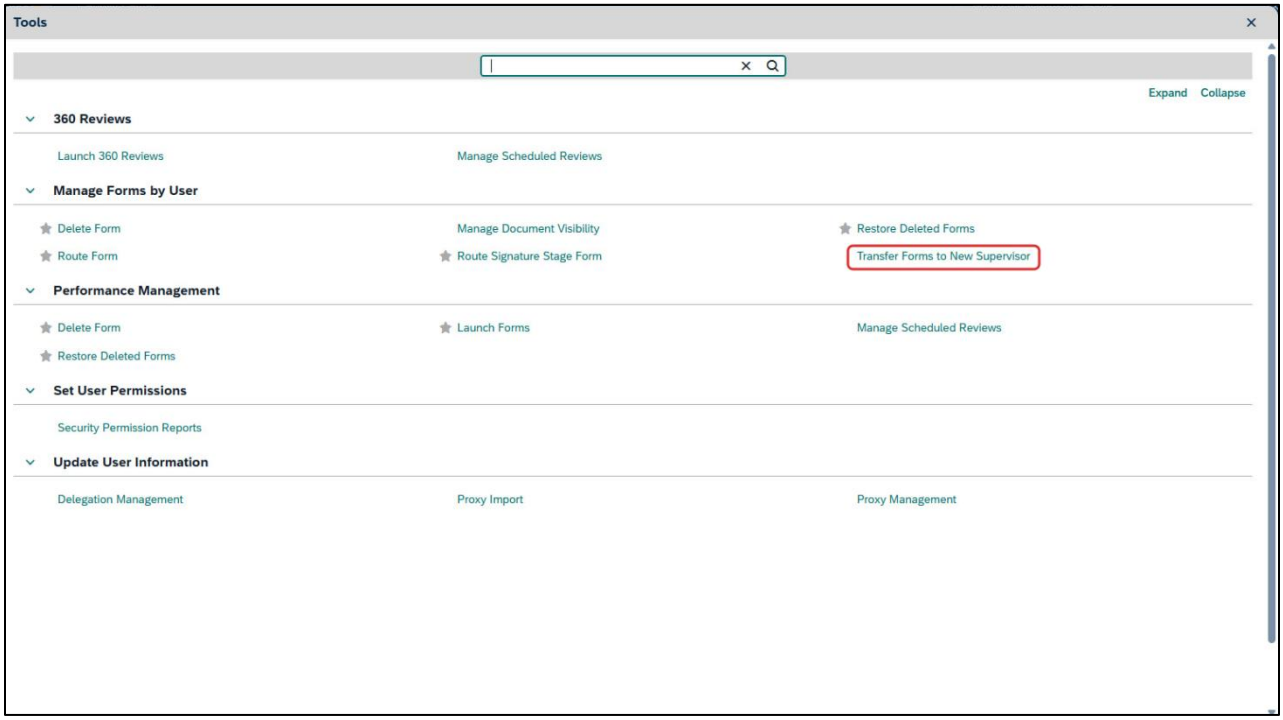


How to Transfer a Form to a New Supervisor in SuccessFactors

1. From the **Main Menu**, navigate to the **Admin Center**.



2. In the **Tools menu**, select **Transfer to New Supervisor**.



3. Enter the employee's **First Name** and **Last Name**.

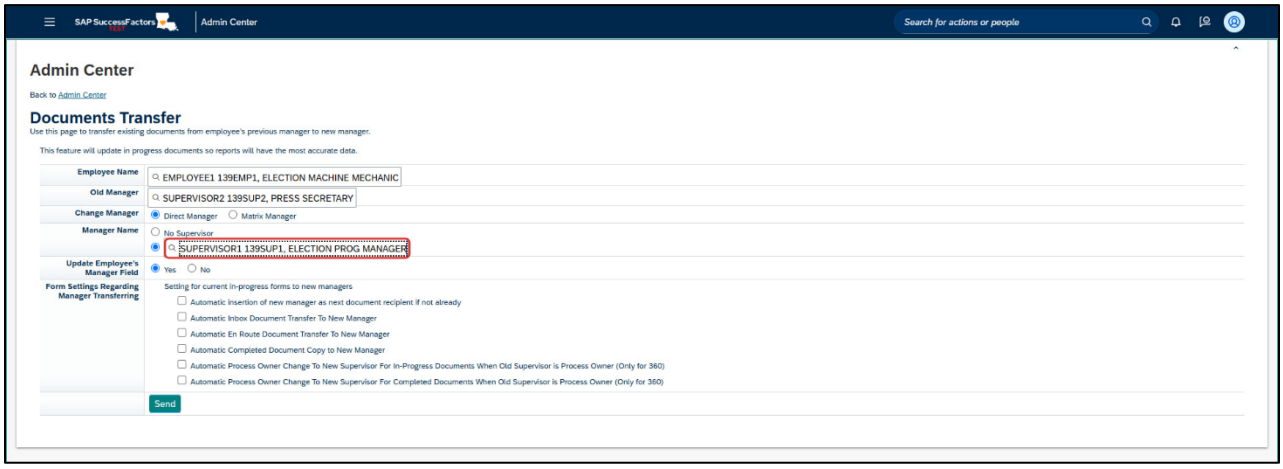
NOTE: The "Old Manager" field will auto-populate once the employee's name has been selected.



4. For **Change Manager**, select **Direct Manager**. **Do NOT select Matrix Manager.**

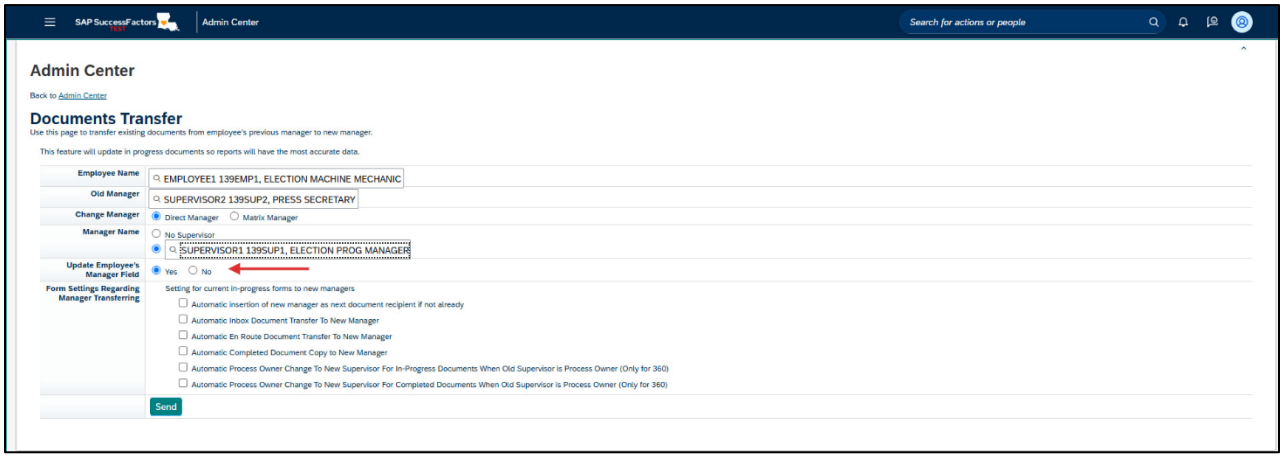


5. Enter the **Manager Name.**



6. Select **Yes** to **Update Employee's Manager Field.**

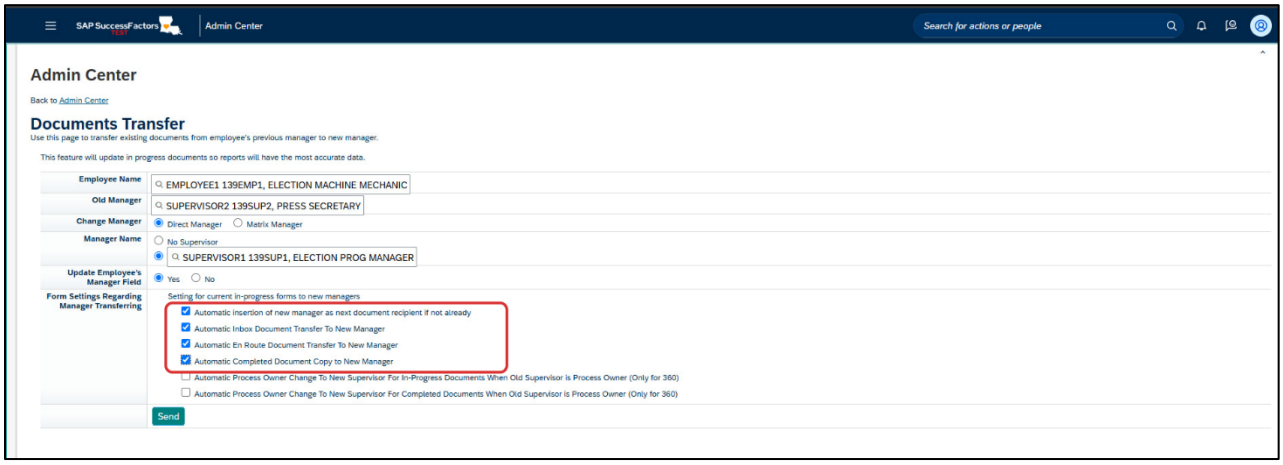
NOTE: Updating an employee's manager field in SuccessFactors changes who they officially report to in the system. This triggers updates to reporting lines, workflows, and forms—so the new manager receives responsibility for performance processes, goals, and visibility going forward. Must select **Yes** to access the form.



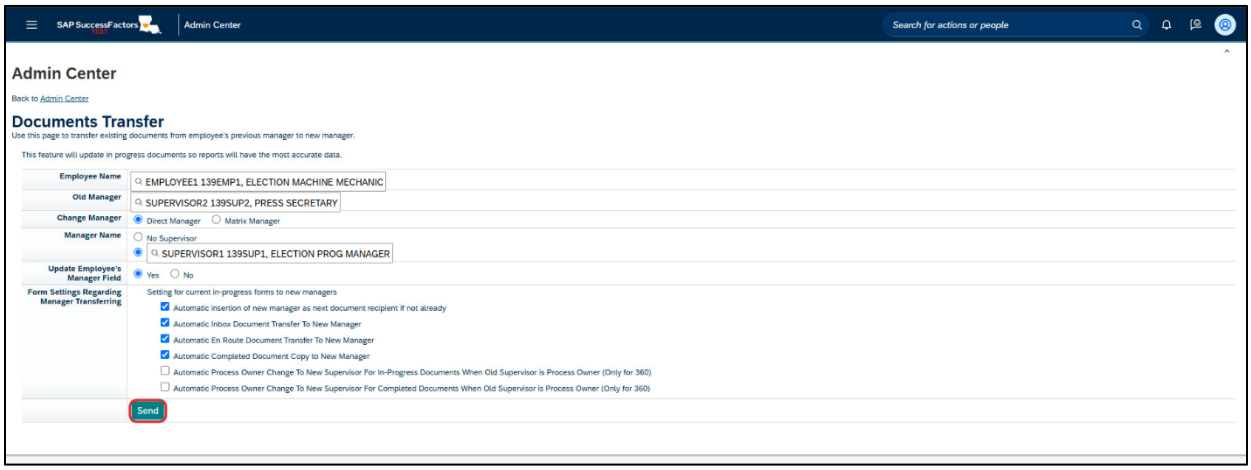
7. Select the **Form Settings Regarding Manager Transferring**.

NOTE: Here is what each option will do moving forward:

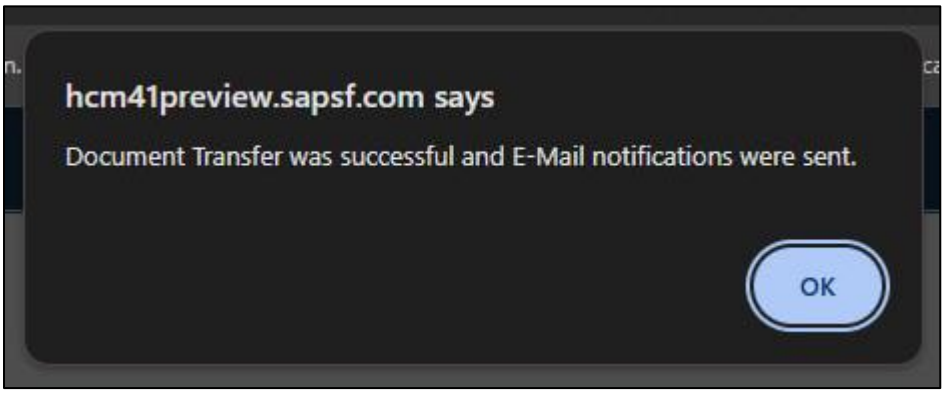
- **Setting for current in-progress forms to new managers:** Moves active forms to the new manager.
- **Automatic insertion of new manager as next document recipient if not already:** Adds new manager into routing if missing.
- **Automatic Inbox Document Transfer To New Manager:** Moves forms in old manager's Inbox to new manager's Inbox.
- **Automatic En Route Document Transfer To New Manager:** Replaces old manager with new one in workflows already in progress.
- **Automatic Completed Document Copy to New Manager:** Gives new manager a copy of finished forms for visibility.
- **Do not select options "Only for 360"**



8. Confirm the transfer details to ensure the correct supervisor is selected. Click **Send**.



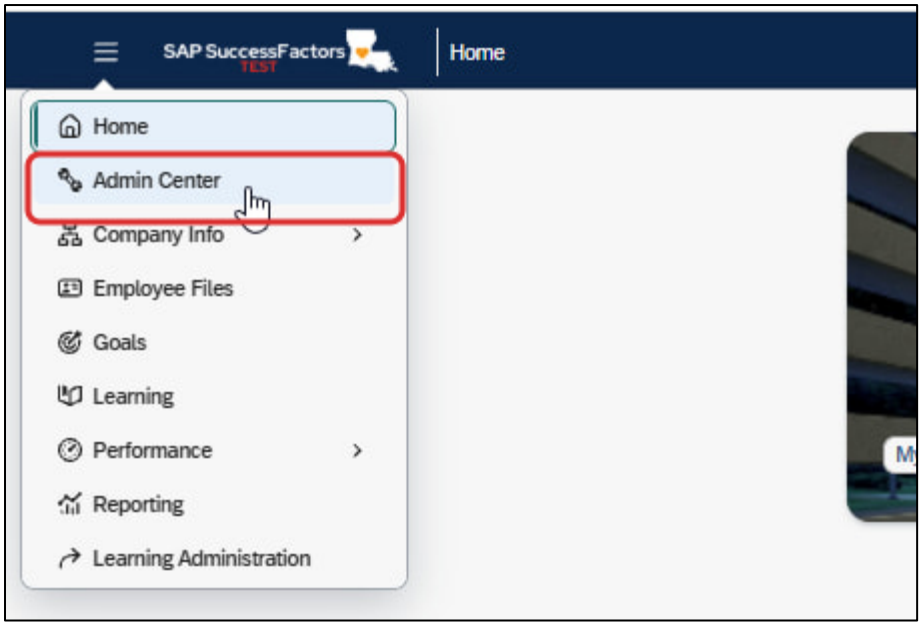
9. A new window opens with confirmation of the action. Don't forget to return the form to the original supervisor once it's completed.



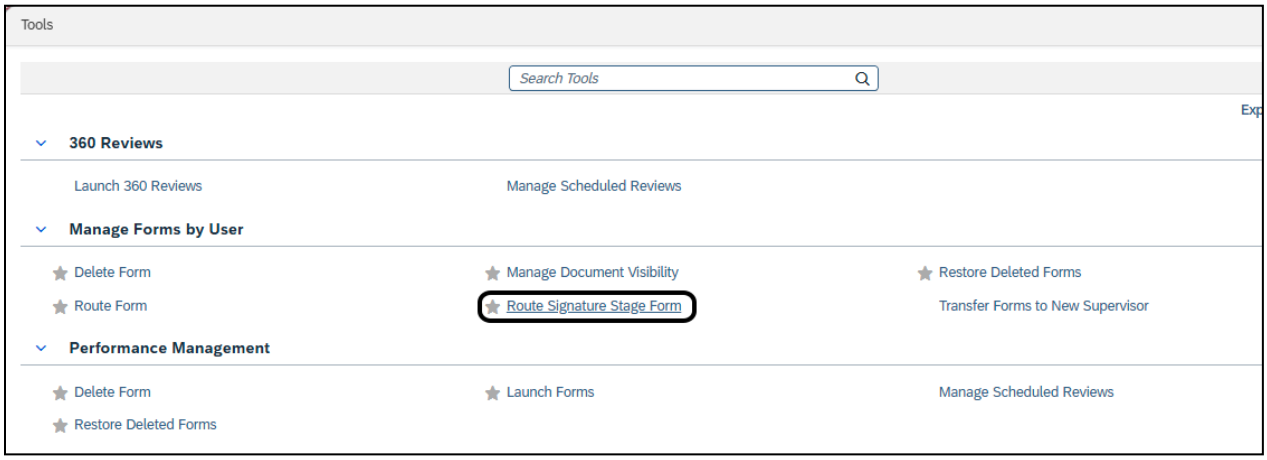
Route Signature Stage Form

You must have the Document ID number before you begin this process. You cannot search for the number within the tool.

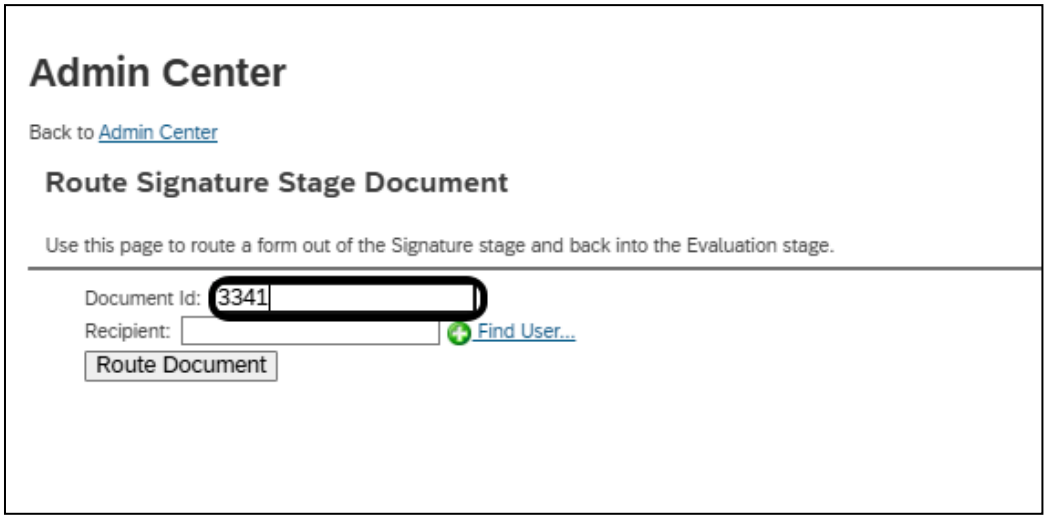
1. From the **Main Menu**, navigate to the **Admin Center**.



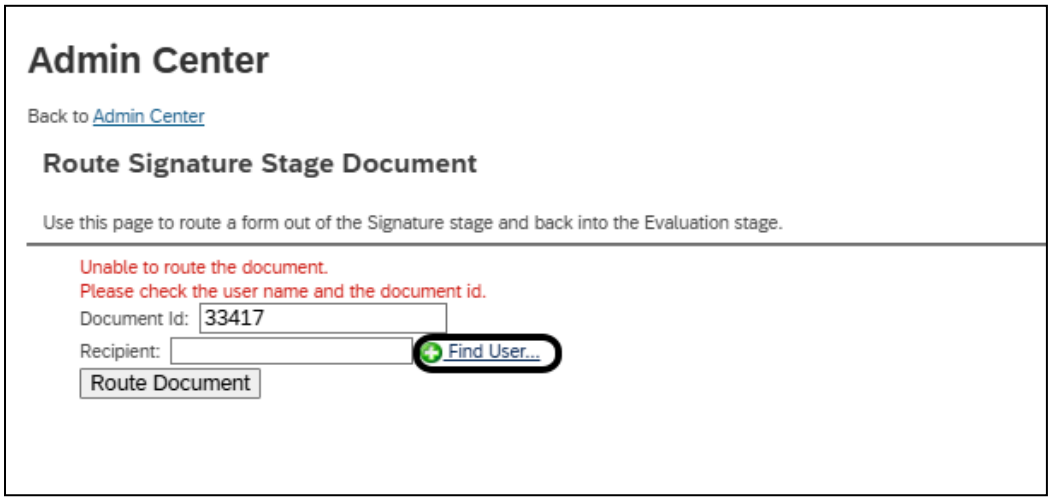
2. In the **Tools menu**, select **Route Signature Stage Form**.



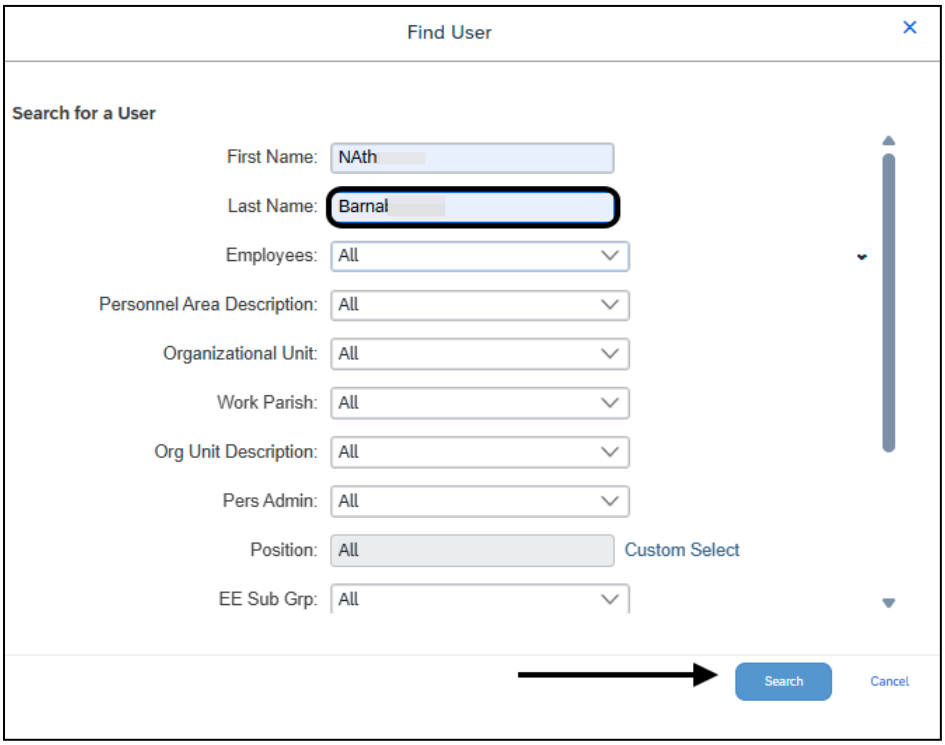
3. Enter the **Document ID number.**



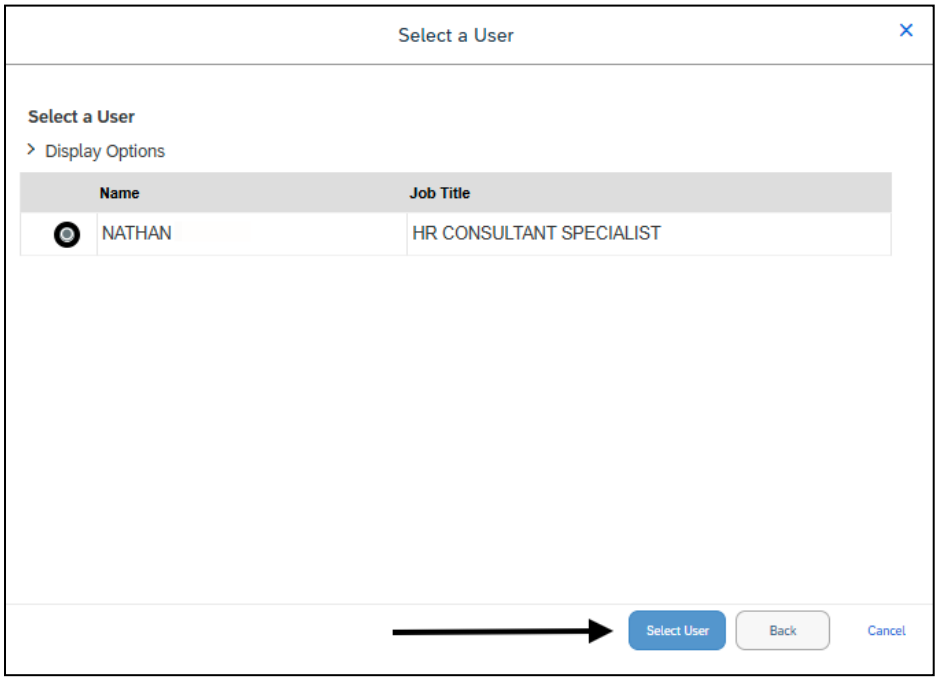
4. Type **the name** in the **Recipient field** or click on **Find User.**



5. If you click **Find User**, a new window opens to find the user. Add **Search Criteria** (like **First Name** and **Last Name**) to find the user. Then, click **Search.**

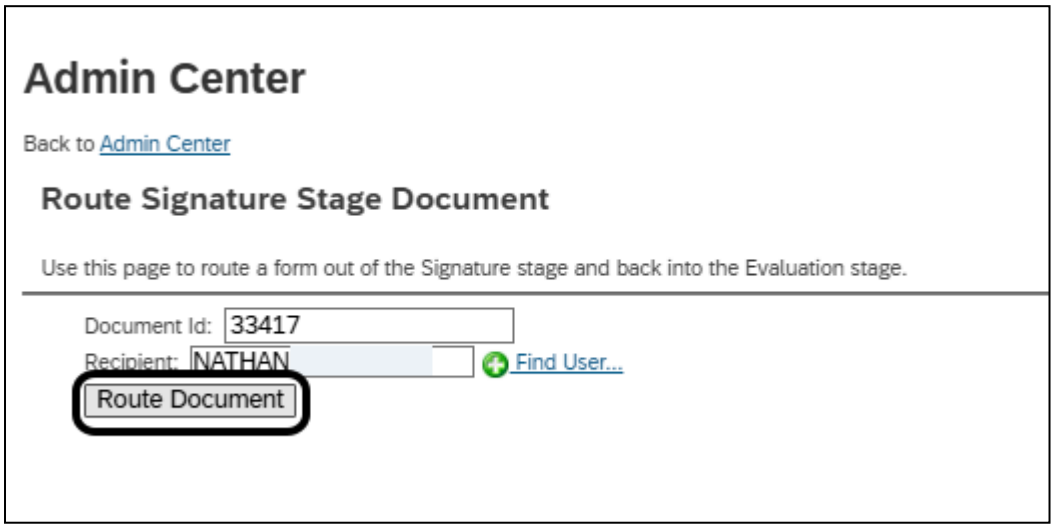


6. **Select the correct user**. Then, click **Select User**.



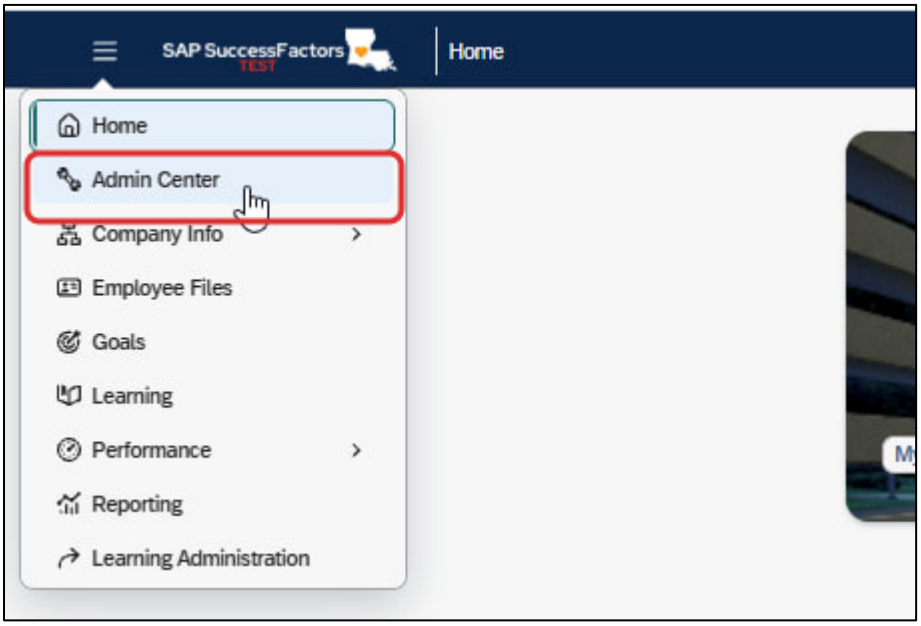
7. Click **Route Document**.

NOTE: You do not get a confirmation message for this action.

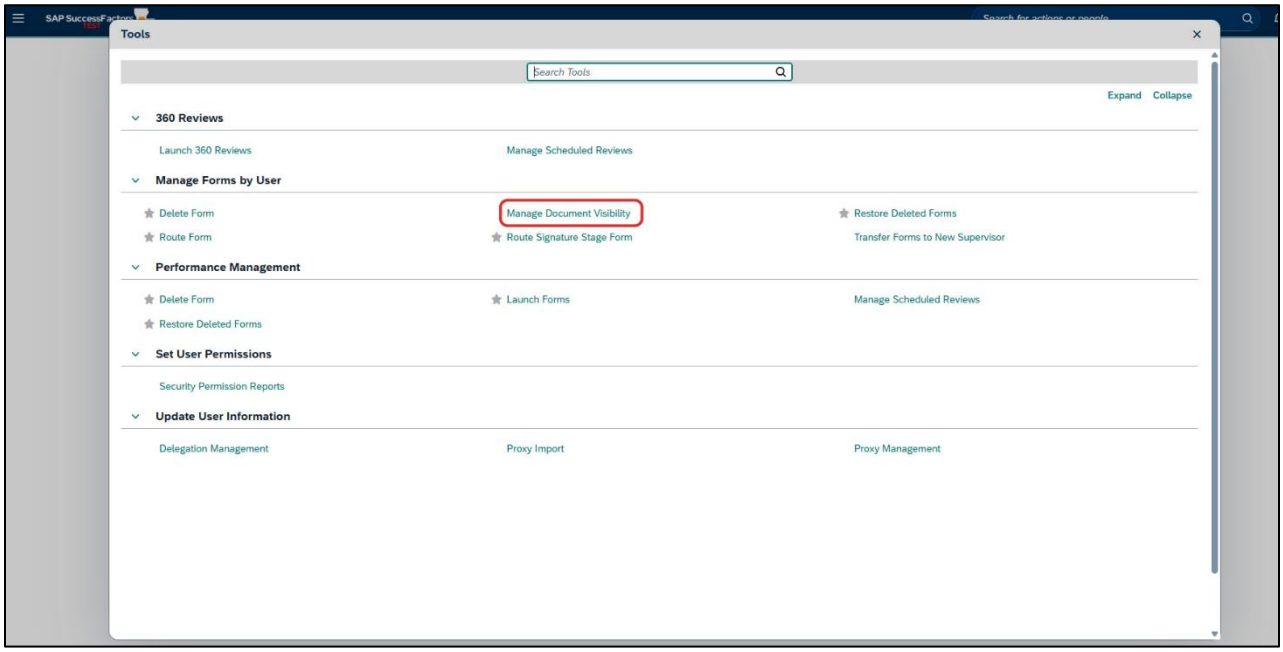


Manage Document Visibility

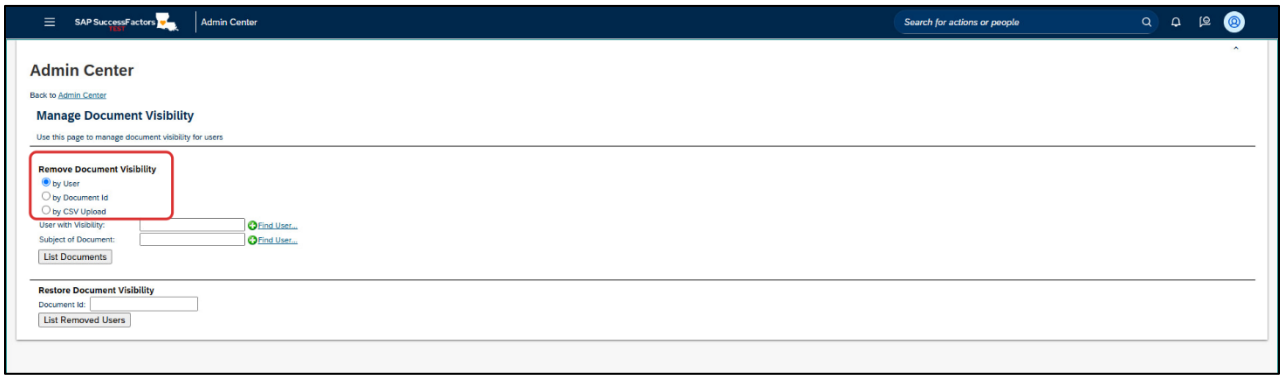
1. From the **Main Menu**, navigate to the **Admin Center**.



2. In the **Tools menu**, select **Manage Document Visibility**.

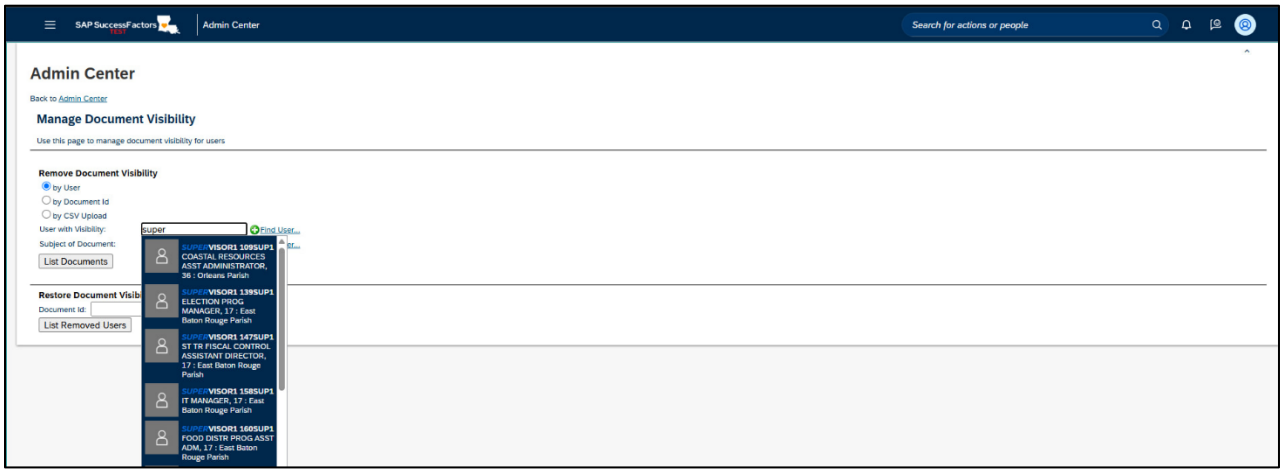


3. Select how you want to remove document visibility, **By User**, **By Document ID**, or **By CSV Upload**. (This example searches by User.)



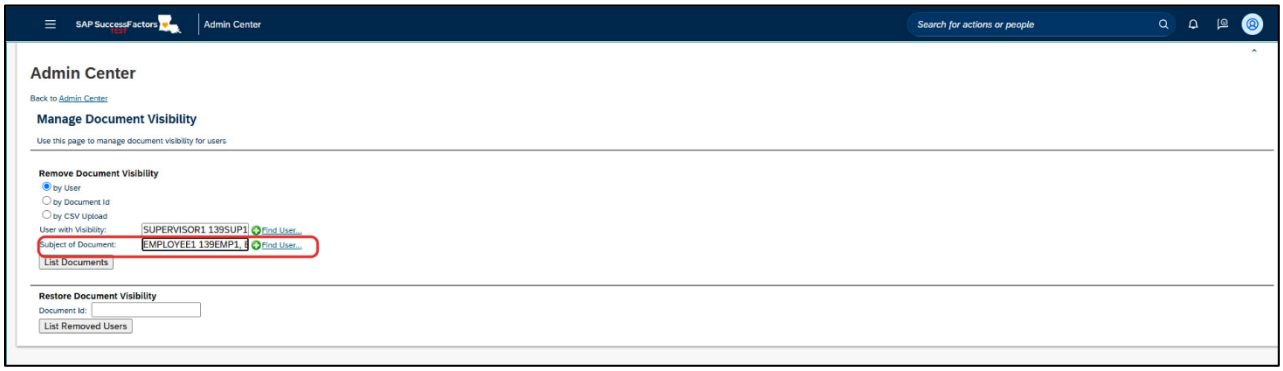
4. Type **the name** in the **User with Visibility field** or click on **Find User.**

NOTE: This is the person who will no longer be able to see the document.

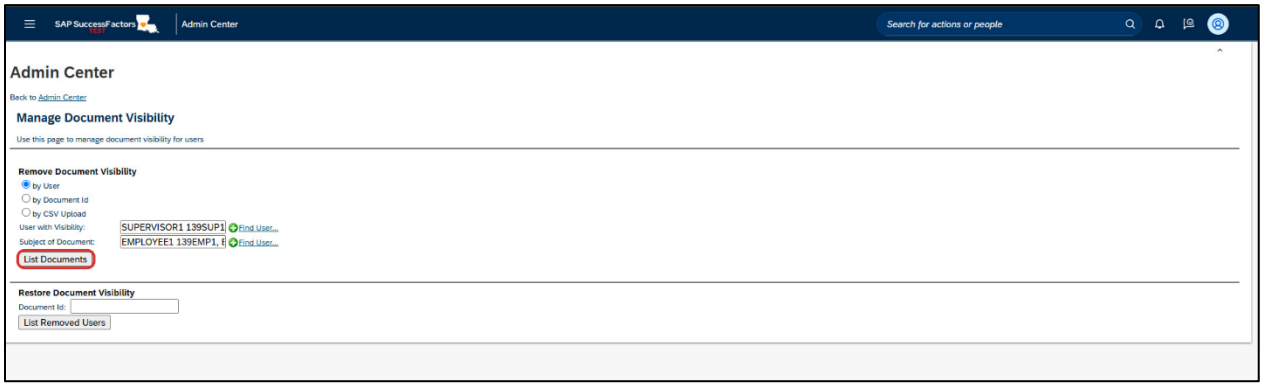


5. Identify the **Subject of the Document**.

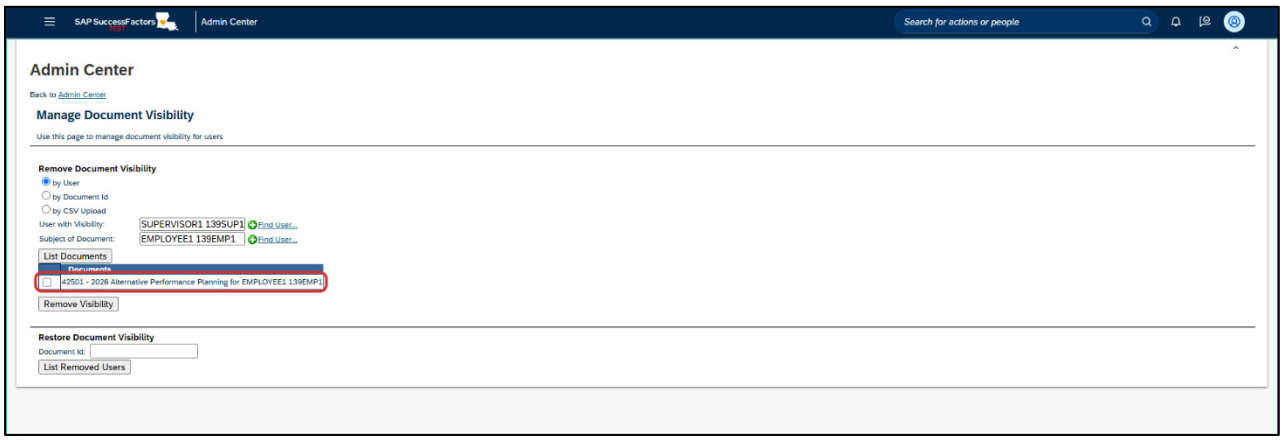
NOTE: This is the employee on the form.



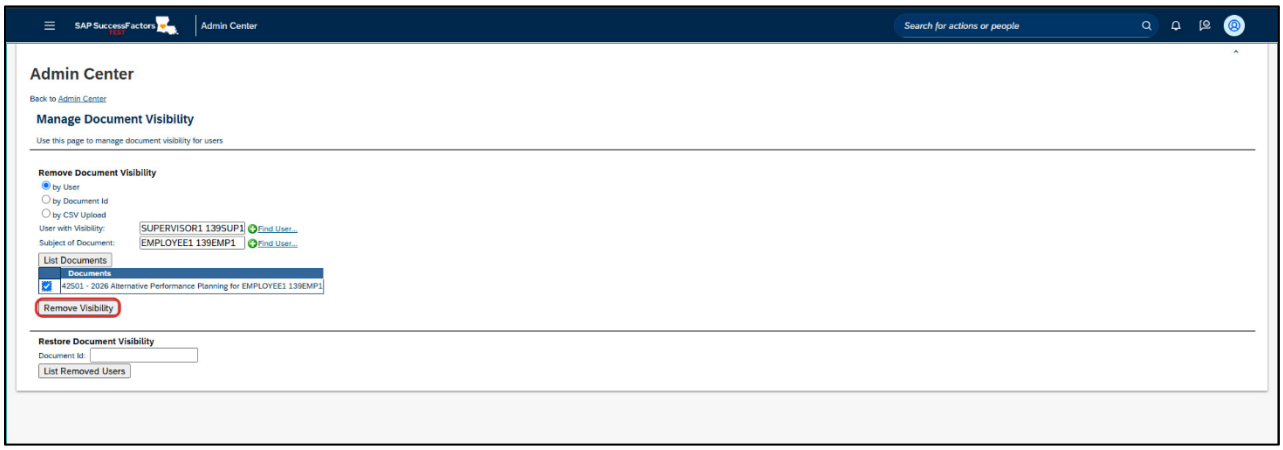
6. Click **List Documents.**



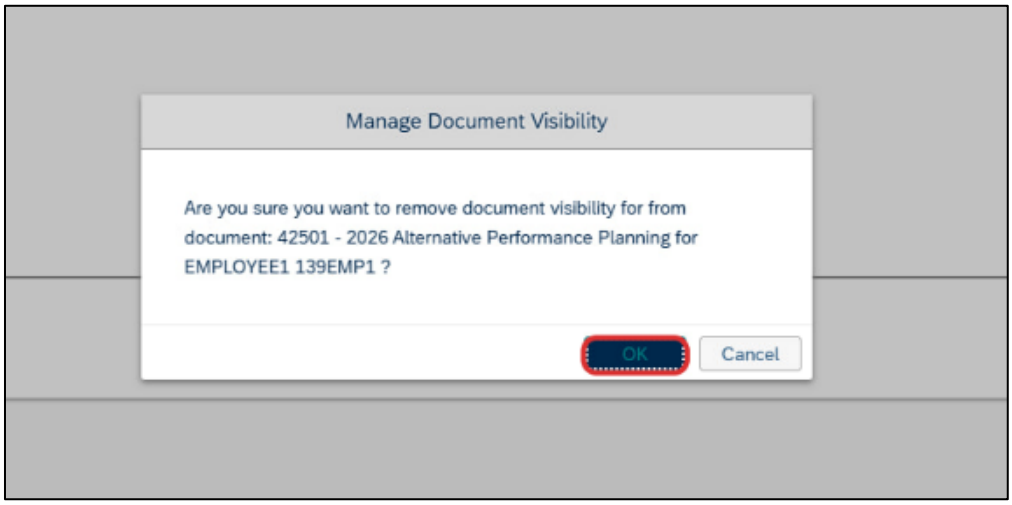
7. Check **the box** next to the correct document.



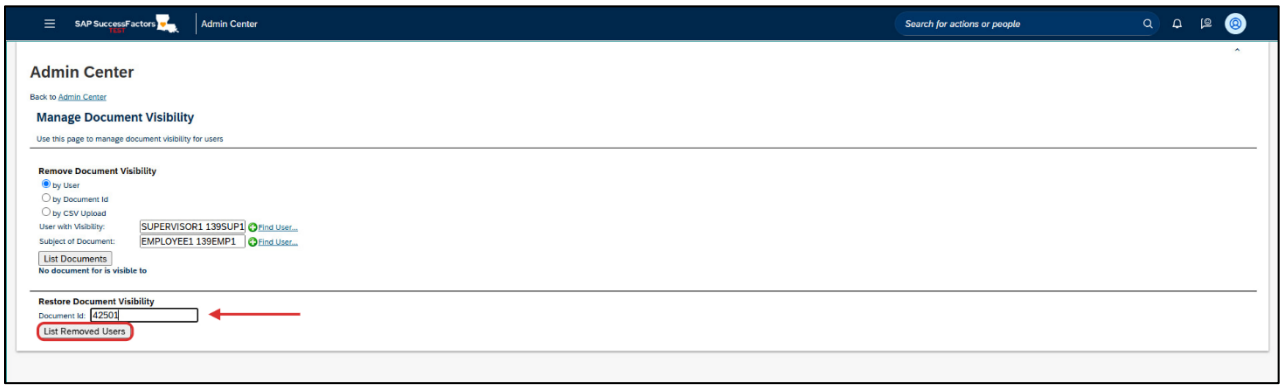
8. Click **Remove Visibility**.



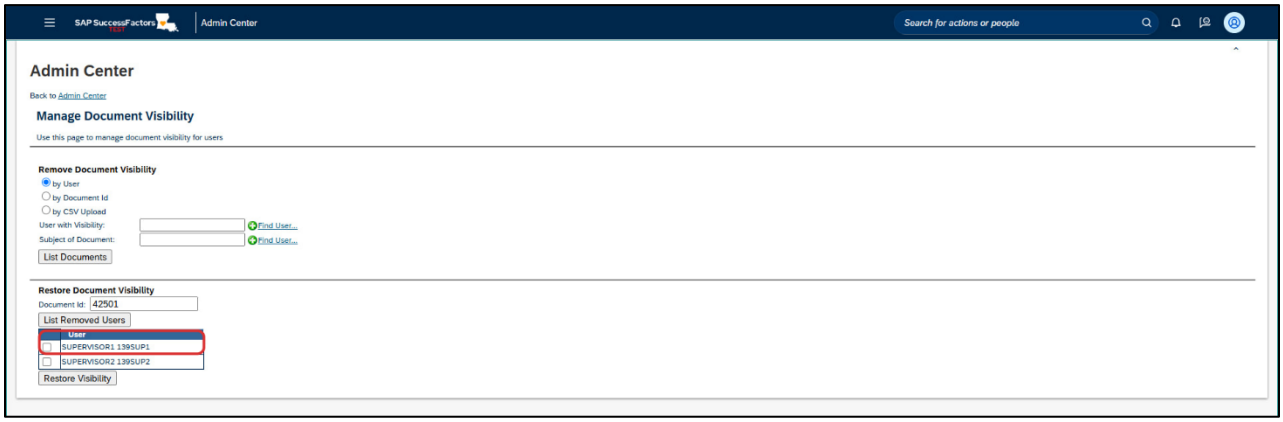
9. Click **OK** on the confirmation message.



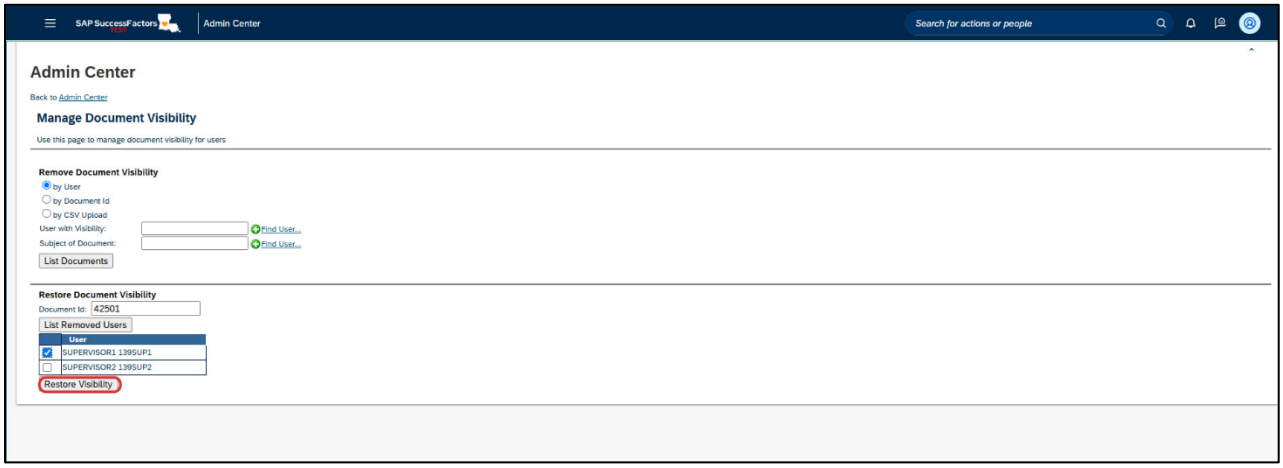
10. To restore document visibility, enter the **Document ID number.** Then, click **List Removed Users**.



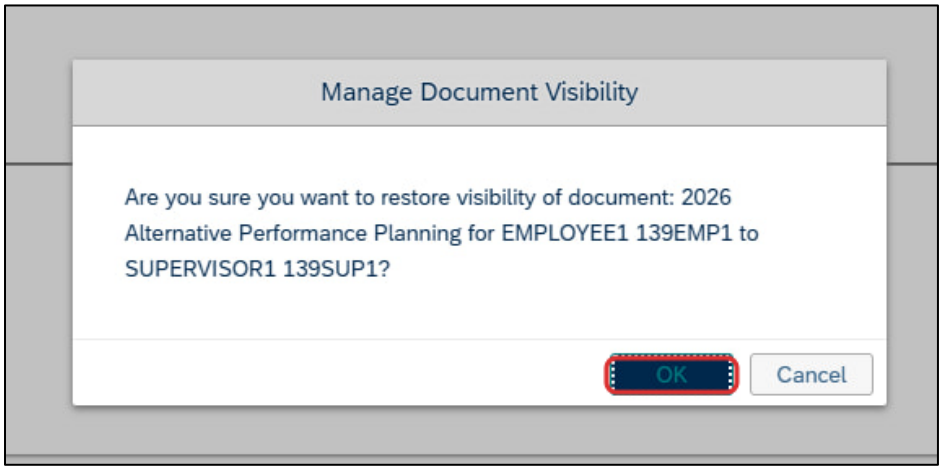
9. **Select the correct user.**



10. Click **Restore Visibility**.



11. Click **OK** on the confirmation message.



Goal Status: Unapproved vs Approved

Goal Plans are **UNAPPROVED** until the Performance Management Form is **APPROVED** by the 2nd Level Evaluator.

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

- Add goals
- Delete goals
- Edit ALL goal fields

If the goal plan is **UNAPPROVED**, the employee will not have access to the goals.

If the goal plan is **APPROVED**,

- Goals can viewed
- Goals cannot be added
- Goals cannot be edited
- Goals cannot be deleted

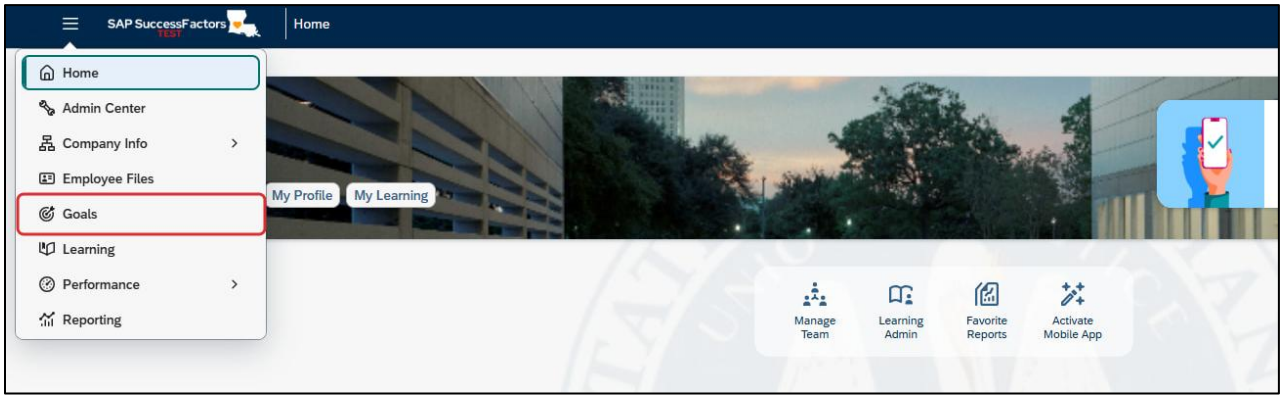
All Agency Administrators can view Goal Plans once they are in Approved Status to ensure that they are compliant with SCS Rule 10. Agency Administrators are also able to **Unapprove** a Goal Plan.

Newly promoted or replacement supervisors will gain access to their new employee's goal plans.

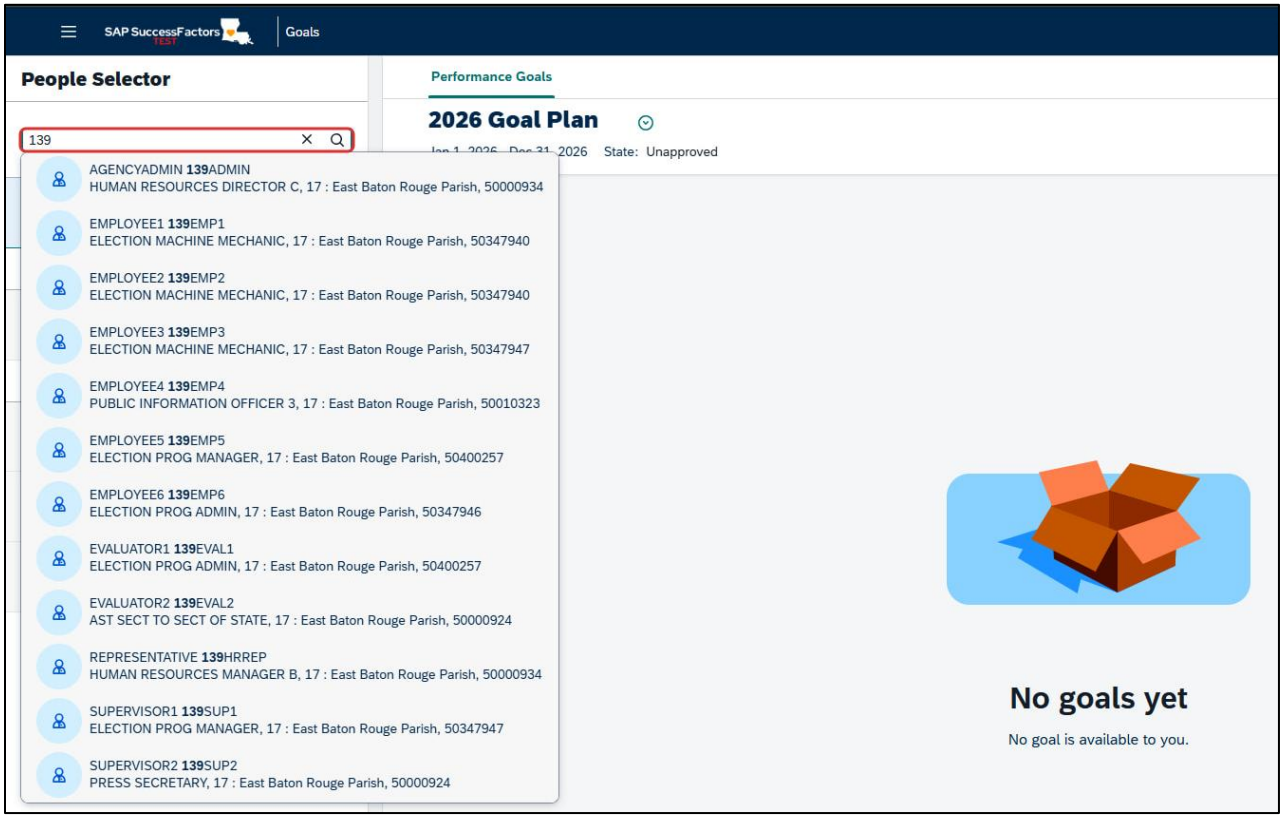
NOTE: The only time you should have to Unapprove a goal plan is if you have to launch an New Hire/Re-Planning Form and chose not to delete the old form.

How to Unapprove a Goal Plan

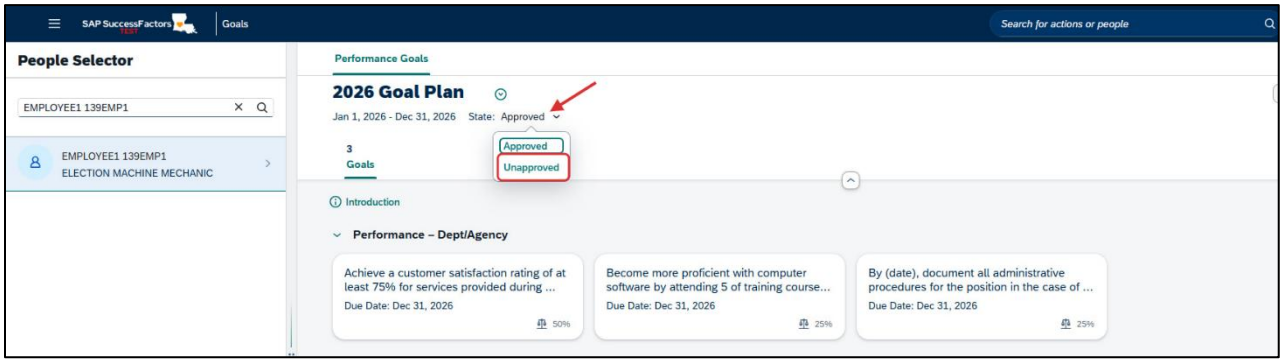
1. From the **Main Menu**, click on **Goals**.



2. Enter **the employee's name** in the **People Selector** search field.



3. Click on the arrow next to **Approved** to open the menu. Then, click **Unapproved**.



Reports

As the Agency Administrator, you have two options to select the reports you wish to view. You can group often-used reports in one place under the "View Favorite Reports" tile or group them in the Reports Menu by "Labels."

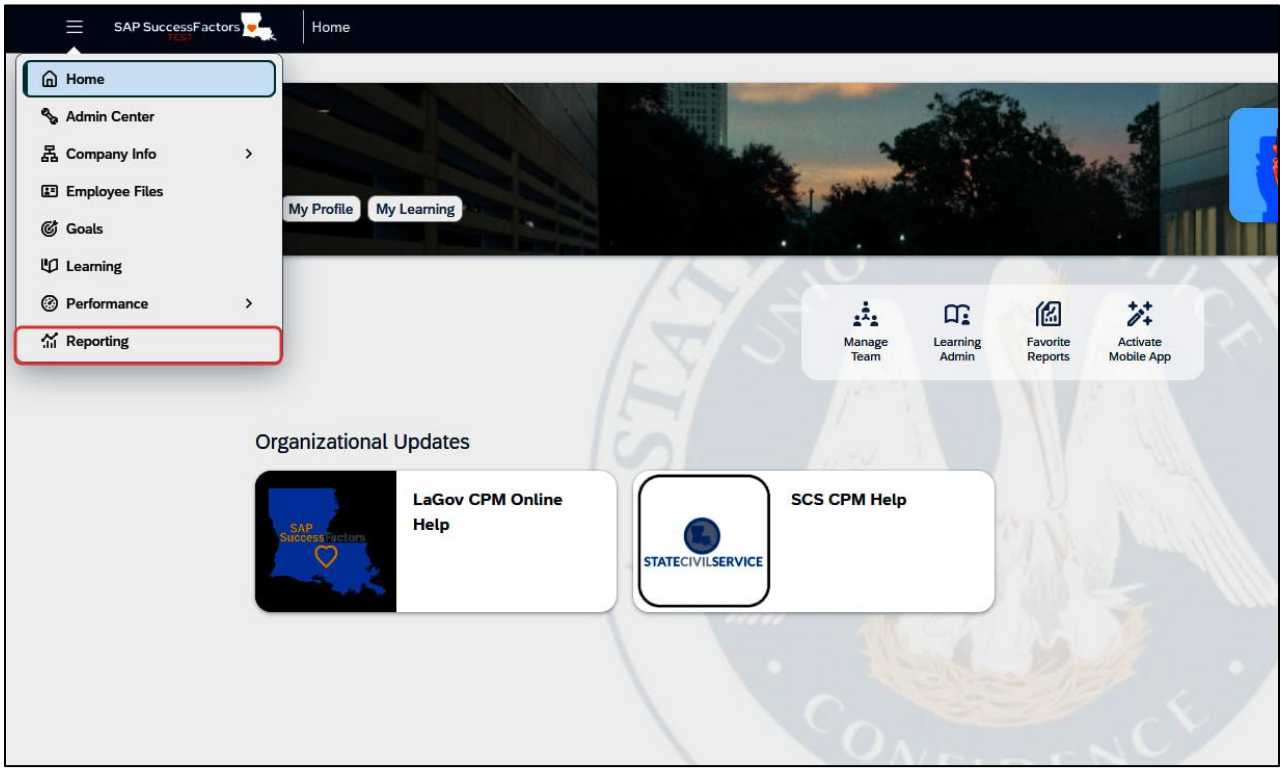
For the Performance Evaluation period, you will use 20XX Performance Form Status, 20XX Invalid Auto-completed Forms - Planning, and 20XX Planning Overview for Classified Employees.

NOTE: The report guidance, including suggested run frequencies, is provided as a recommendation. Agency Administrators and supervisors should use their discretion when deciding how to implement it based on their agency's processes and operational needs.

CPM Reporting

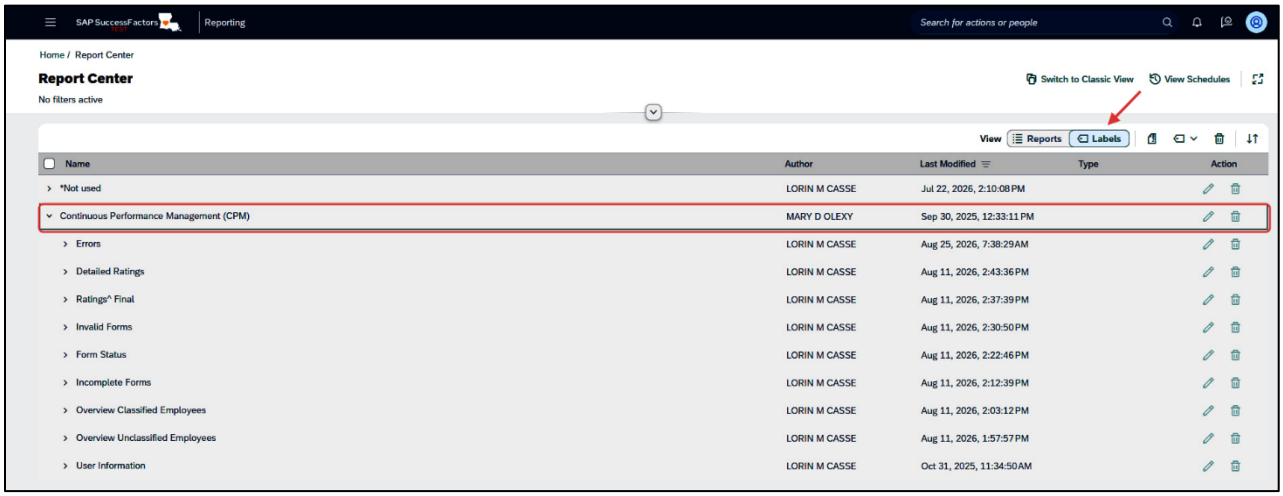
To access all CPM Reports available to you, click the “View Report Center tile from the SuccessFactors Main page.

1. Select **Reporting** from the **Main Menu.**



2. Locate the **Continuous Performance Management (CPM) Reports folder a**nd open it. Here will be a list of all available reports and the years for which they can be run. Be careful to select the correct step in the Performance process (Planning or Evaluations) and the correct year when making a selection. Available folders and related report explanations follow.

   NOTE: Selecting **Labels** will organize the reports into folders.



Troubleshooting CPM Reports in SuccessFactors

This is a troubleshooting guide meant to help users having issues loading various reports in SuccessFactors- CPM.

Clearing Cookies/Cache/History in Google Chrome:

1. Open Chrome: Start by opening your Google Chrome browser.
2. Menu: Click on the three dots in the upper-right corner of the window to open the menu.
3. History: Hover over **History** and then click on **History** in the submenu that appears.
4. Clear browsing data: On the left side of the screen, click on **Delete browsing data.**
5. Choose what to clear: A box will appear where you can choose the time range (like **Last hour** or **All time**). Check the boxes next to **Cookies and other site data**, **Cached images and files**, and **Browsing History**.
6. Clear Data: Click the **Delete data** button to delete your selected items.
7. Exit and relaunch Chrome.

Checking Google Chrome for Browser Updates:

1. Open Chrome: Start by opening your Google Chrome browser.
2. Menu: Click on the three dots in the upper-right corner of the window to open the menu.
3. Settings: Hover over **Help** and then click on **About Google Chrome**.
4. Check for Updates: Chrome will automatically check for updates. If an update is available, it will start downloading automatically.
5. Update Chrome: Once the update is downloaded, you will see a prompt to Relaunch the browser. Click **Relaunch** to complete the update process.

Checking Google Chrome to Allow Third-party Cookies:

1. Open Chrome: Start by opening your Google Chrome browser.
2. Menu: Click on the three dots in the upper-right corner of the window to open the menu and click **Settings**.
3. Settings: Click **Privacy and Security** and then click **Third-party cookies**.

4. Allow Third Party Cookies: Click the radio button to allow third-party cookies.
5. Exit and relaunch Chrome.

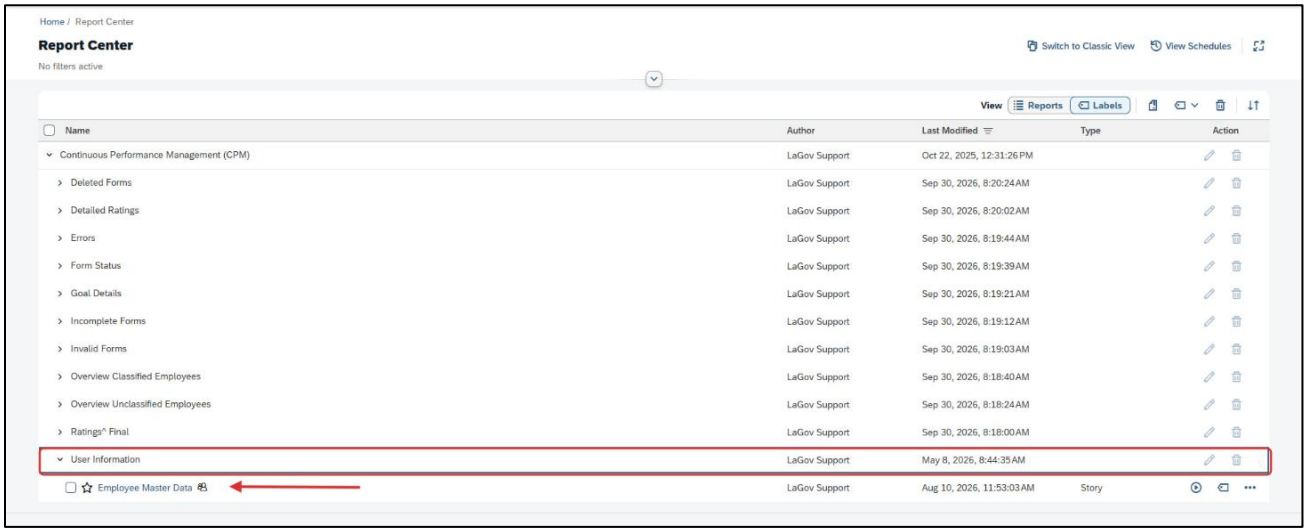
Employee Master Data Report

- **Purpose:** The Employee Master Data Report provides personnel details, organizational assignments, and supervisor relationships. Use it to verify employee records, identify discrepancies, and confirm employees are assigned to the correct supervisors for performance planning and evaluations.
- **When to Use:** Run the report quarterly. Review it after personnel changes, such as new appointments, reallocations, transfers, or supervisor changes.
- **Key Considerations:**
    - Check that employee information, organizational assignments, and supervisor relationships are accurate and up to date.
    - The suggested frequency and procedures are recommendations. Use your agency's discretion when implementing them.
    - The information and screenshots in this guide reflect SAP SuccessFactors as of October 2026. The system is updated twice a year, so screens and images may change after an update.

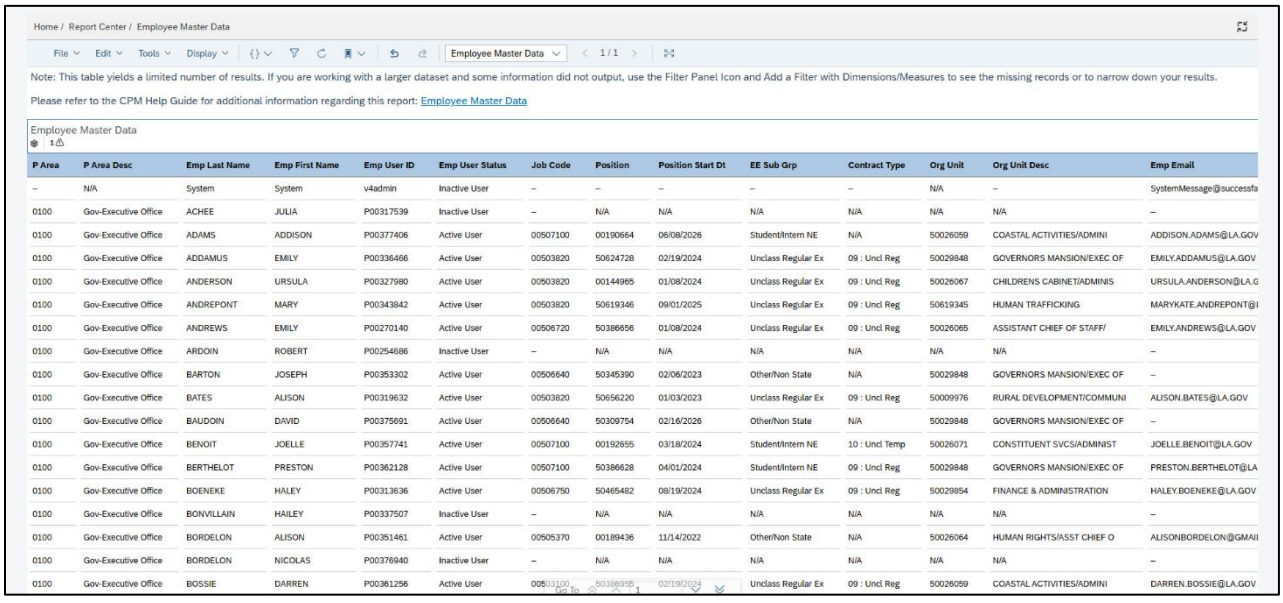
1. Locate the applicable **CPM reporting folder.**



2. Locate and select **User Information.** Hover over the down arrow and select **Employee Master Data.**



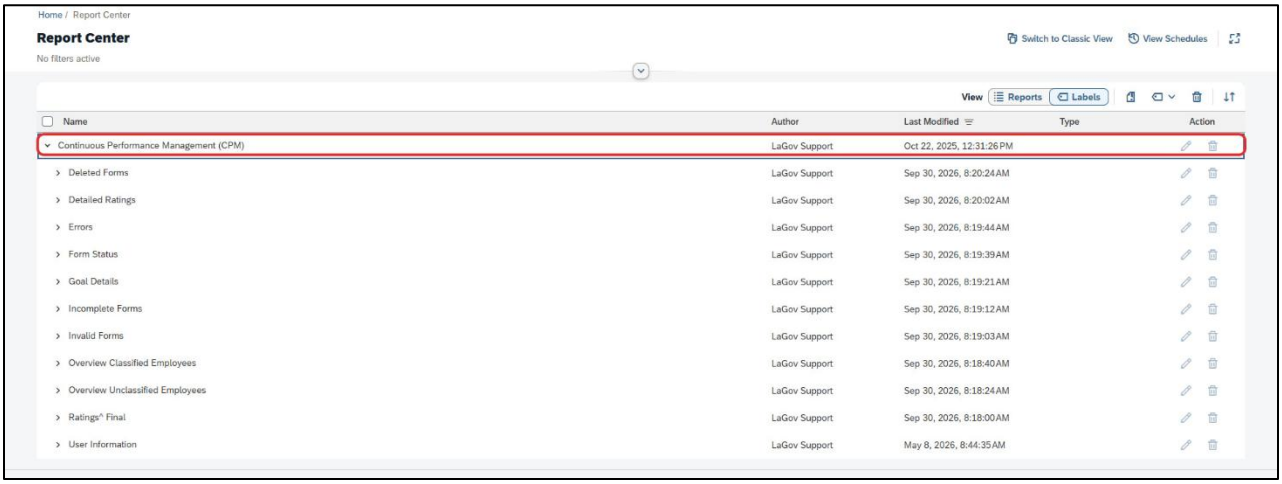
3. Review the report results.



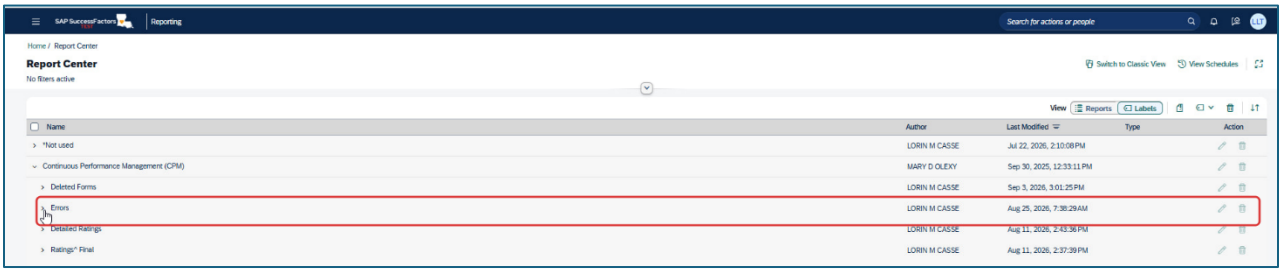
Needs Improvement Comparison

- **Purpose:** The report lists employees who received a “Needs Improvement” rating in the previous performance year and displays their rating for the current performance year. Agency Administrators can use it to compare ratings, identify consecutive “Needs Improvement” ratings, and determine whether additional review or follow-up is needed.
- **When to Use:** Run the report annually before the Performance Evaluation period begins and after it ends. You may also review it as needed to monitor employees who previously received a “Needs Improvement” rating.
- **Key Considerations:**
    - Each row represents an employee who received a “Needs Improvement” rating in the previous performance year.
    - Compare Previous Eval Rating and Current Eval Rating to identify employees with consecutive “Needs Improvement” ratings.

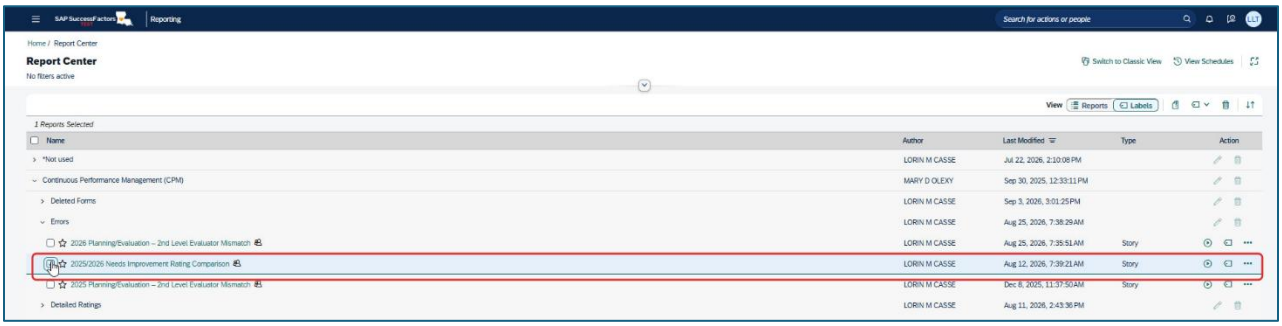
1. Locate and expand **Continuous Performance Management (CPM).**



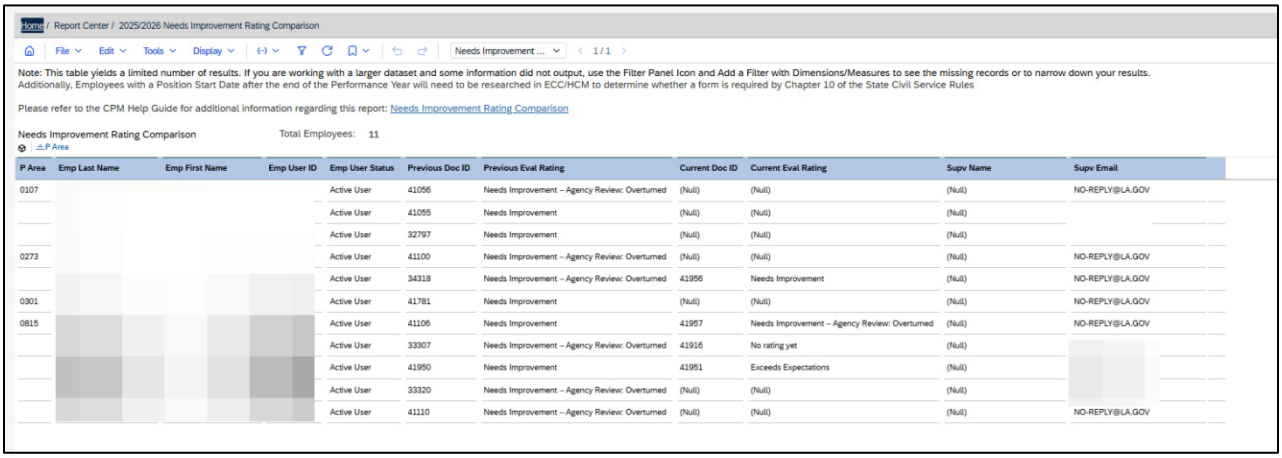
2. Locate and expand **Errors.**



3. Select **Needs Improvement Rating Comparison** for the applicable performance years.



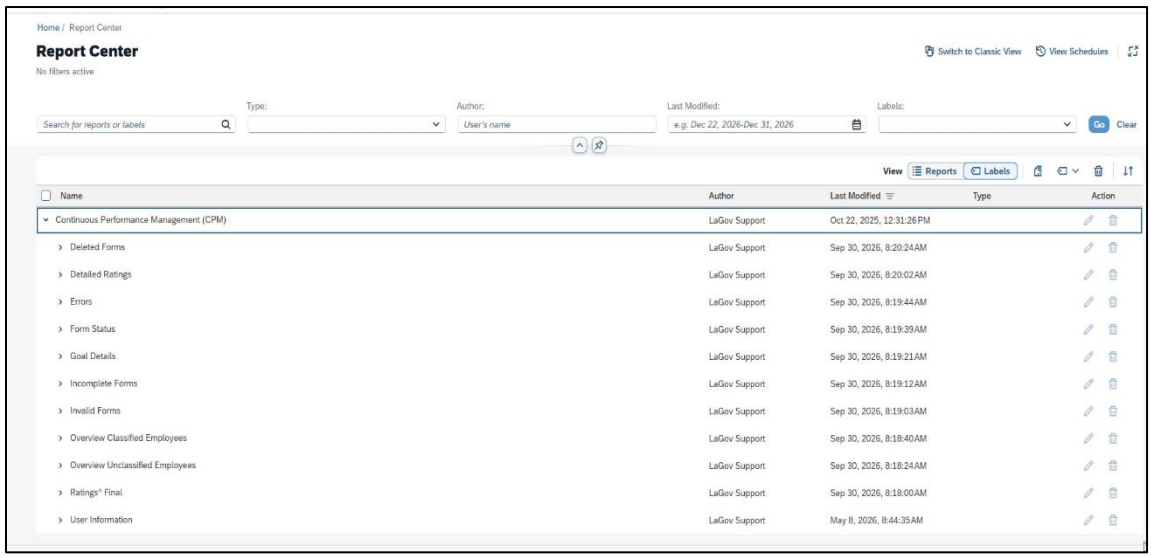
4. Review the report results to compare previous and current evaluation ratings.



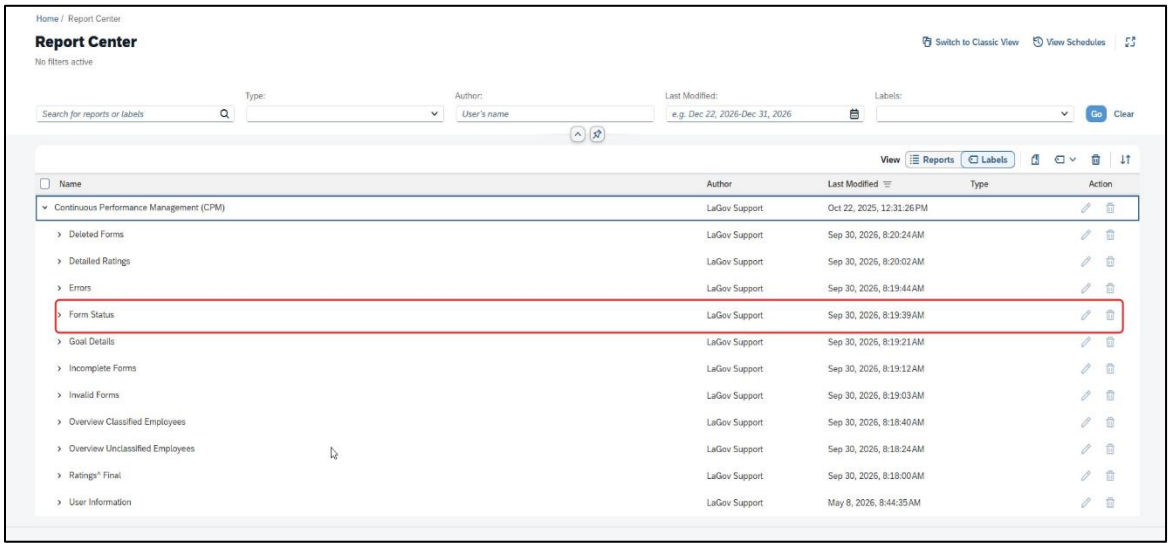
Form Status Report

- **Purpose:** The Form Status Report tracks the progress and completion of CPM Performance Planning and Evaluation forms. Use it to monitor completion, identify forms still in progress, and determine which supervisors or employees may need follow-up.
- **When to Use:** Run the report as often as needed during the Performance Planning and Evaluation periods. Increase how often you run it as deadlines approach.
- **Key Considerations:**
    - Review the results for outstanding forms and follow up with supervisors or employees as needed.
    - Regular monitoring provides time to address incomplete forms before required completion dates.

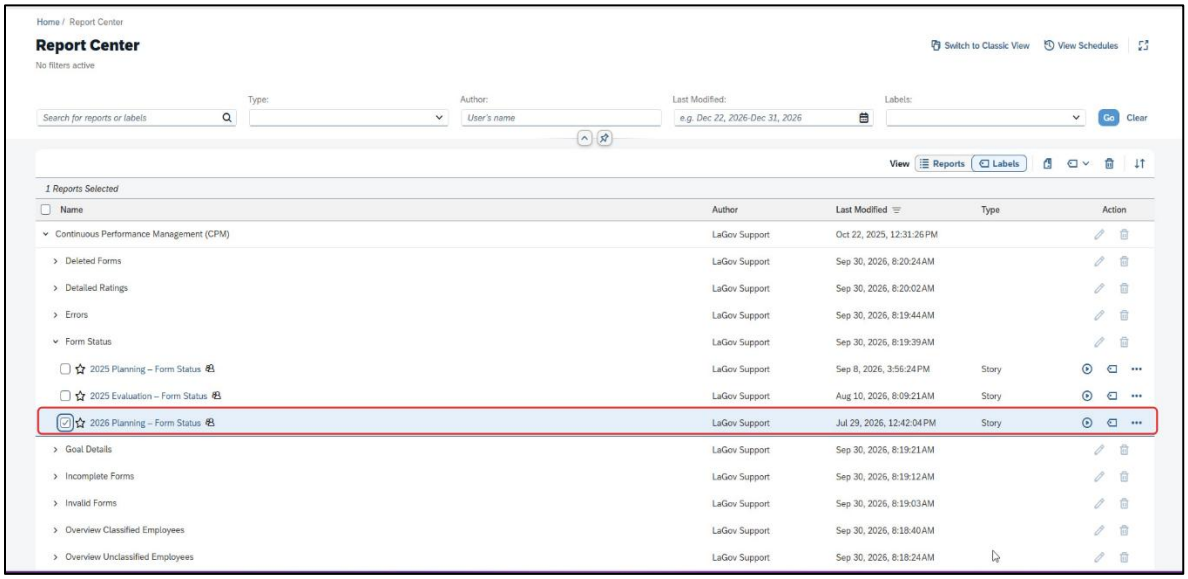
1. Locate the applicable **CPM reporting folder.**



2. Select **Form Status** to open the report.

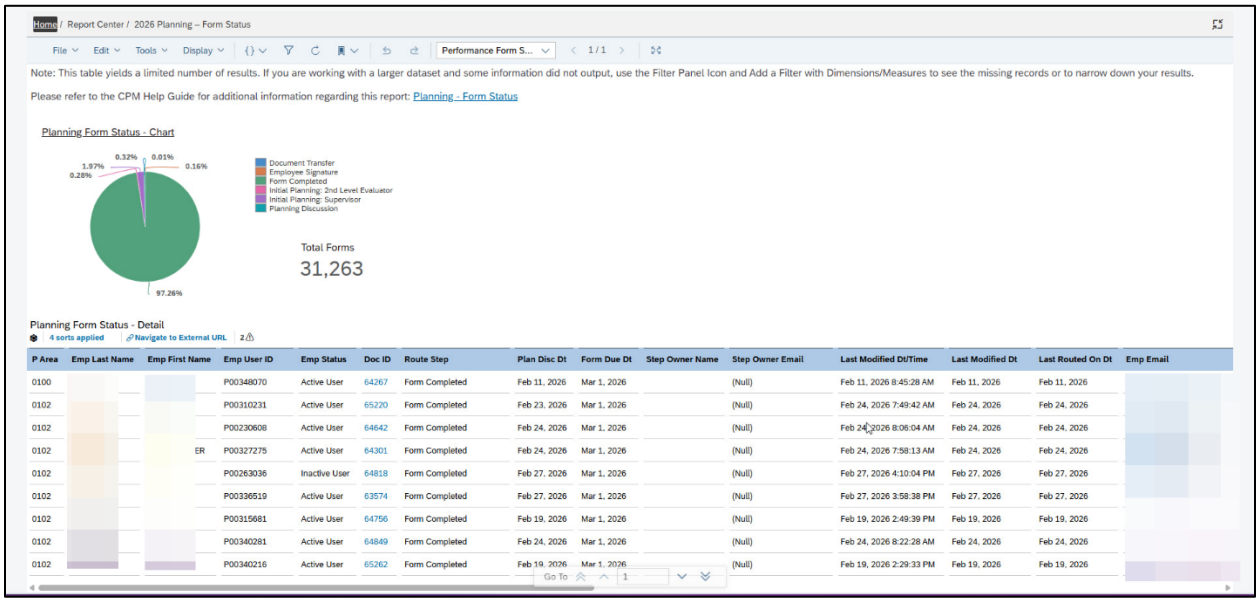


3. Select the **correct report** to view. You will see separate Form Status reports for planning and evaluation as well as for different years.



4. **Review the detailed employee records to determine each form's current status.**

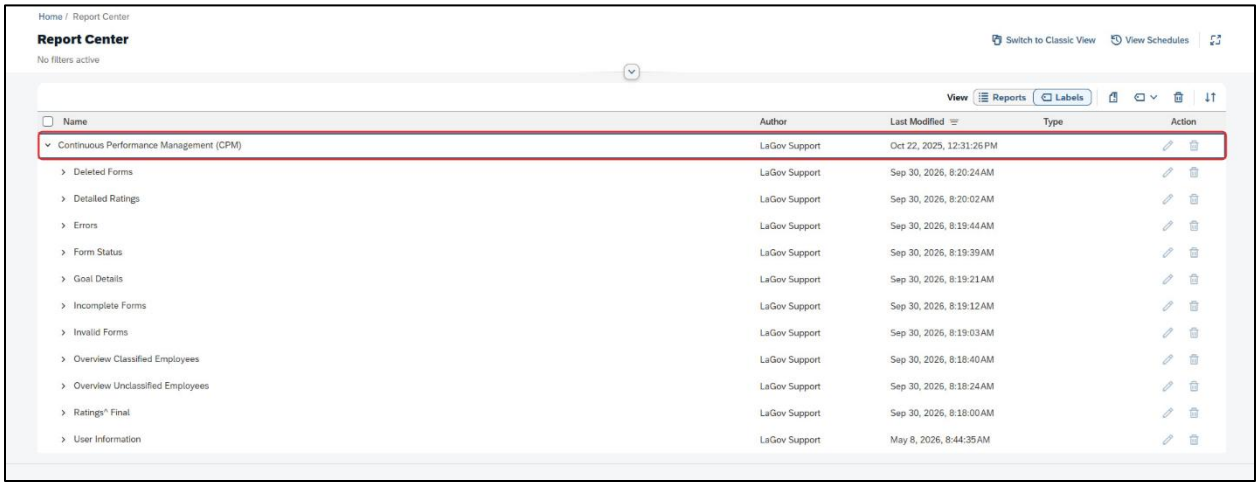
NOTE: Each row represents an employee's form and includes the employee's name, User ID, Form ID, and current Route Step. Use Route Step to determine whether the form is complete or still in progress. For forms that are still in progress, use Step Owner Name to identify who currently has the form and Last Modified Dt/Time to determine when it was last updated.



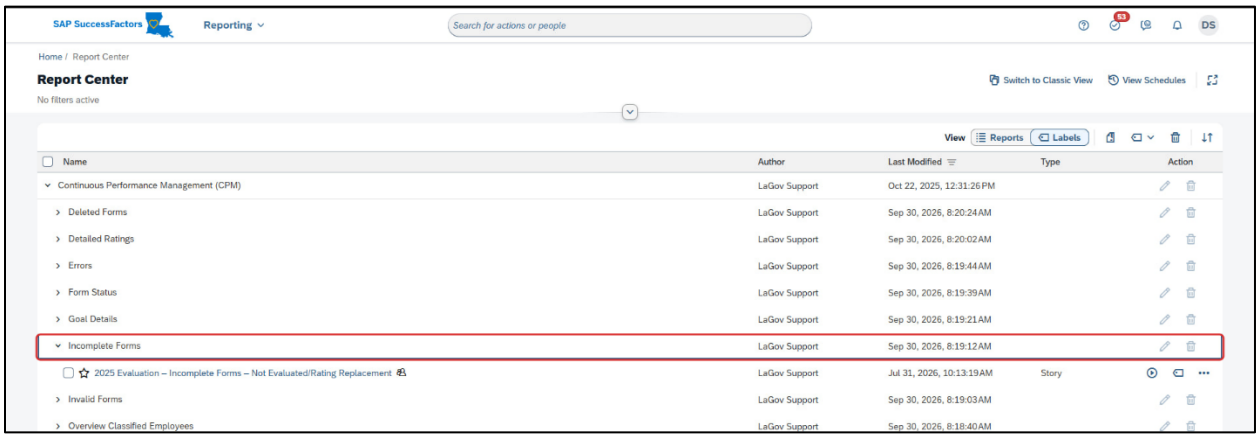
Incomplete Forms Report

- **Purpose**: Incomplete Report identifies launched Not Evaluated and Rating Replacement forms that have not been completed. Agency Administrators can use it to find outstanding forms and determine whether each form should be completed or deleted.
- **When to Use:** Run the report monthly and before the end of each evaluation period to identify and resolve incomplete forms.
- **Key Considerations:**
    - Confirm that required forms are completed.
    - Delete forms that are no longer needed.

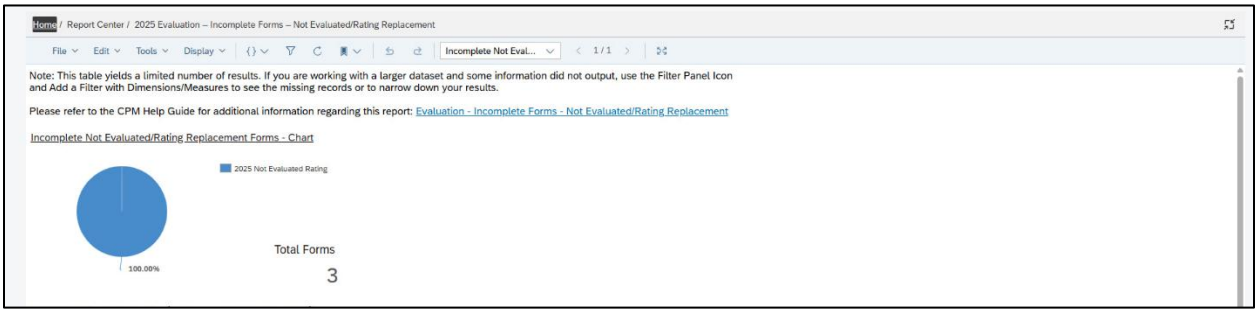
1. Locate the applicable **CPM reporting folder.**



2. **Select the correct report to view.** You will see separate reports for planning and evaluation as well as for different years.

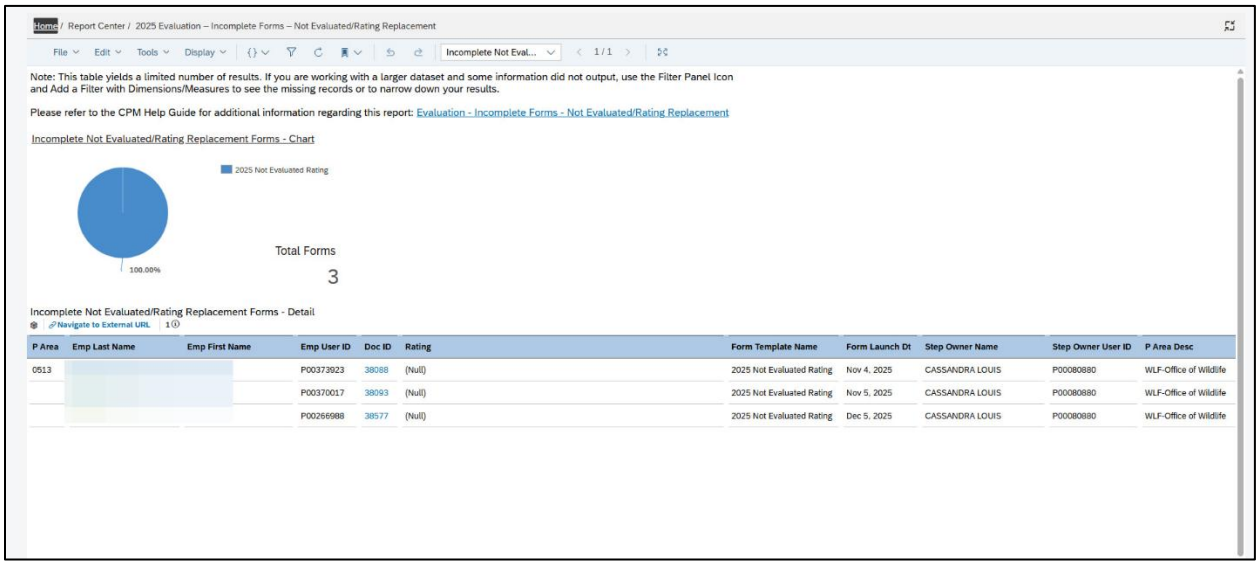


3. Review the results to identify outstanding **Not Evaluated** and **Rating Replacement forms.**



4. Determine whether each form should be completed or deleted.

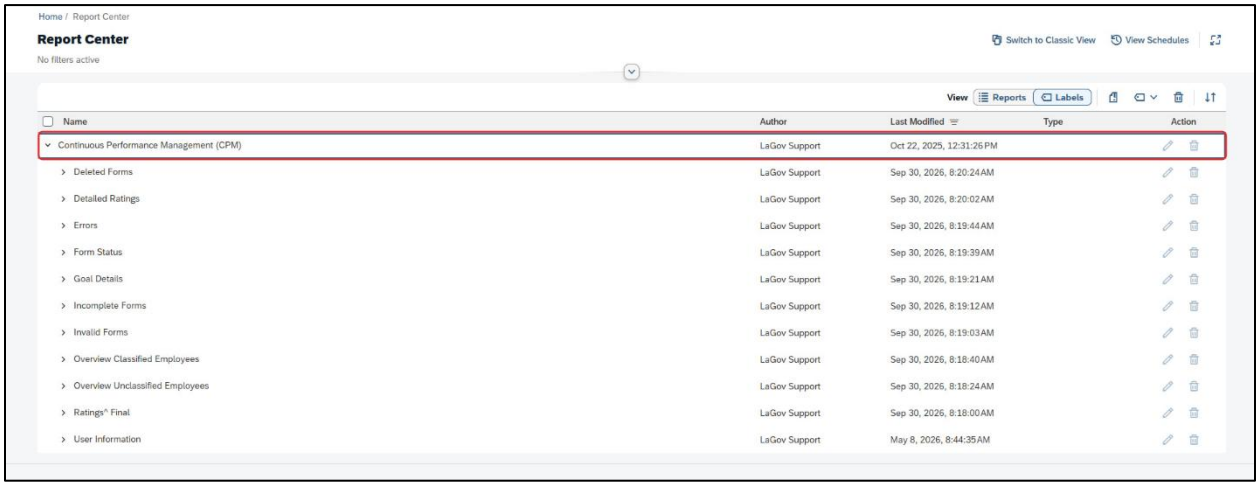
NOTE: Each row represents an incomplete Not Evaluated or Rating Replacement form that has been launched but not completed. Review the results to identify outstanding forms and determine whether each form is required. Required forms must be completed, and unnecessary forms should be deleted. These form types do not automatically advance to completion.



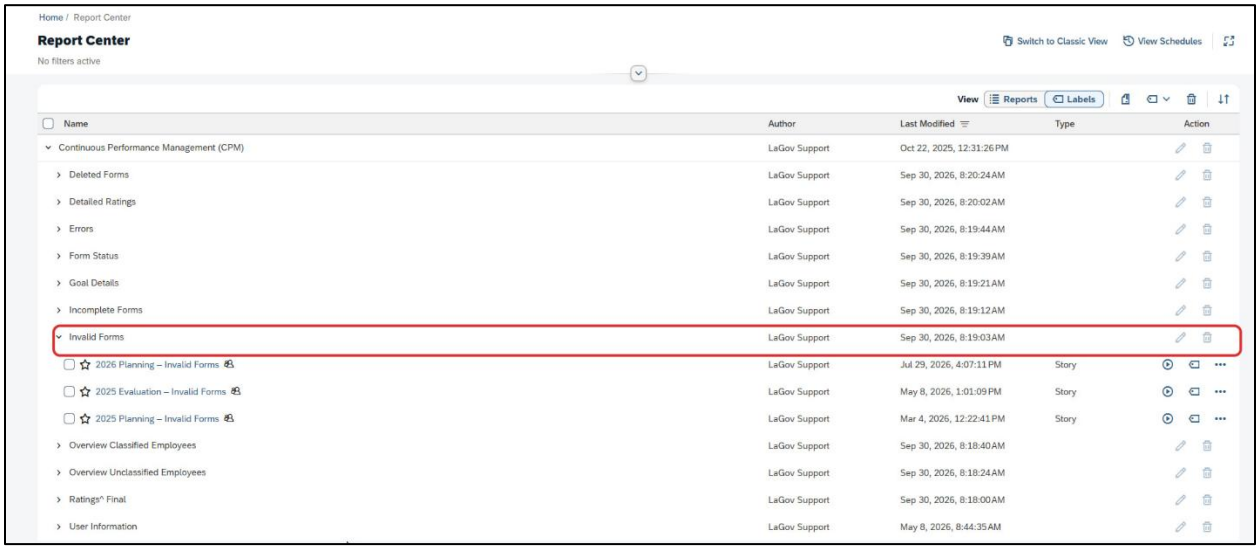
Invalid Forms Report

- **Purpose:** The Invalid Forms Report identifies Performance forms automatically moved to “Completed” without a planning discussion date. Agency Administrators can use it to identify forms that must be deleted and relaunched to meet CPM requirements.
- **When to Use:** Review the report to check forms that were automatically moved to “Completed,” especially when they remain incomplete the day after their due date.
- **Key Considerations:** Each row represents a Performance form automatically moved to “Completed” without a planning discussion date.
    - A “Completed” status does not necessarily mean a Performance Planning form is valid. Verify the planning discussion date before deciding whether corrective action is needed.
    - Forms without a planning discussion date are invalid and must be deleted and relaunched.
    - State Civil Service considers forms with a planning discussion date valid, even if they were automatically moved through later route map steps.

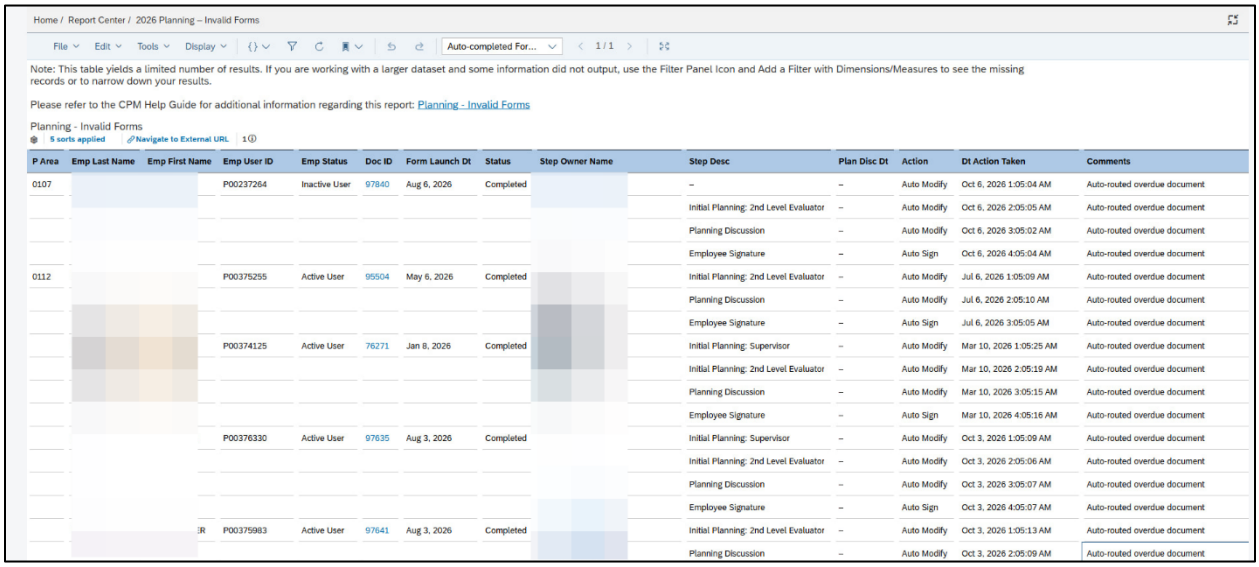
1. Locate the applicable **CPM reporting folder.**



2. Select **Invalid Forms** to open the report. Select the **correct report** to view. You will see separate reports for planning and evaluation as well as for different years.



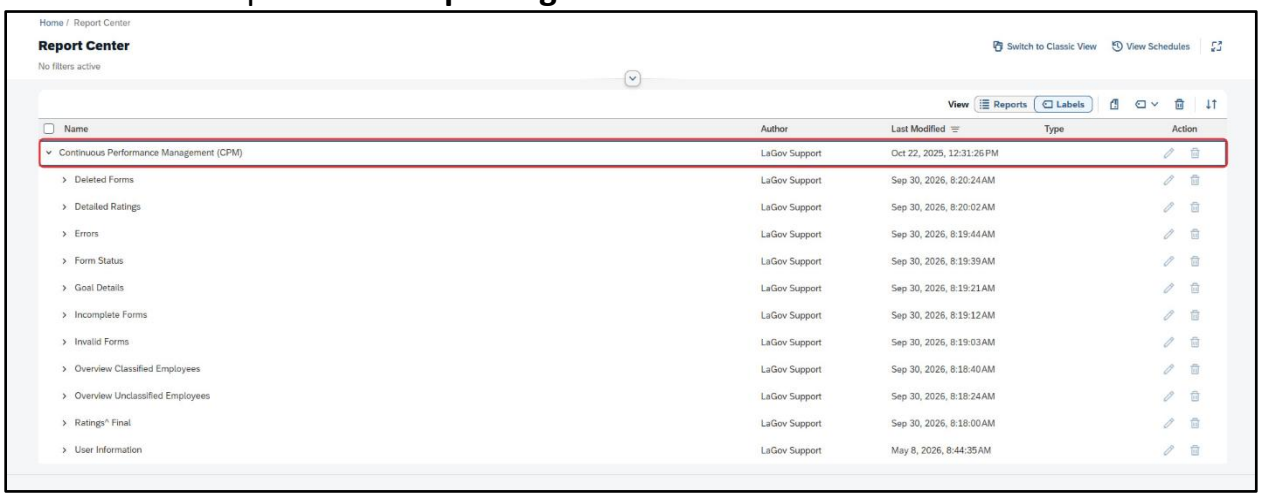
3. Review the report results to identify planning forms that were automatically pushed to completion. Identify forms without a planning discussion date and coordinate the deletion and relaunch of invalid forms.



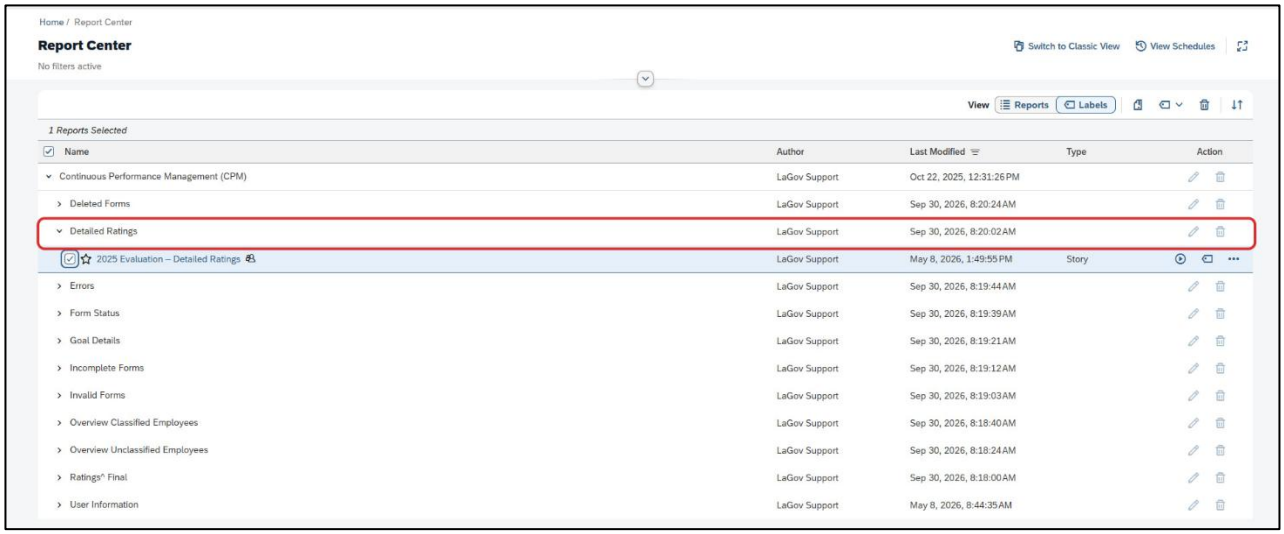
Detailed Ratings Report

- **Purpose:** The Detailed Ratings Report provides Performance Evaluation forms with valid ratings. Agency Administrators can use it to review rating distributions and verify evaluation information.
- **When to Use:** Run the report annually after the Performance Evaluation period. Review it as needed to examine individual employee ratings and goal details.
- **Key Considerations:**
    - The report includes overall performance ratings, evaluation discussion dates, and individual goal ratings.

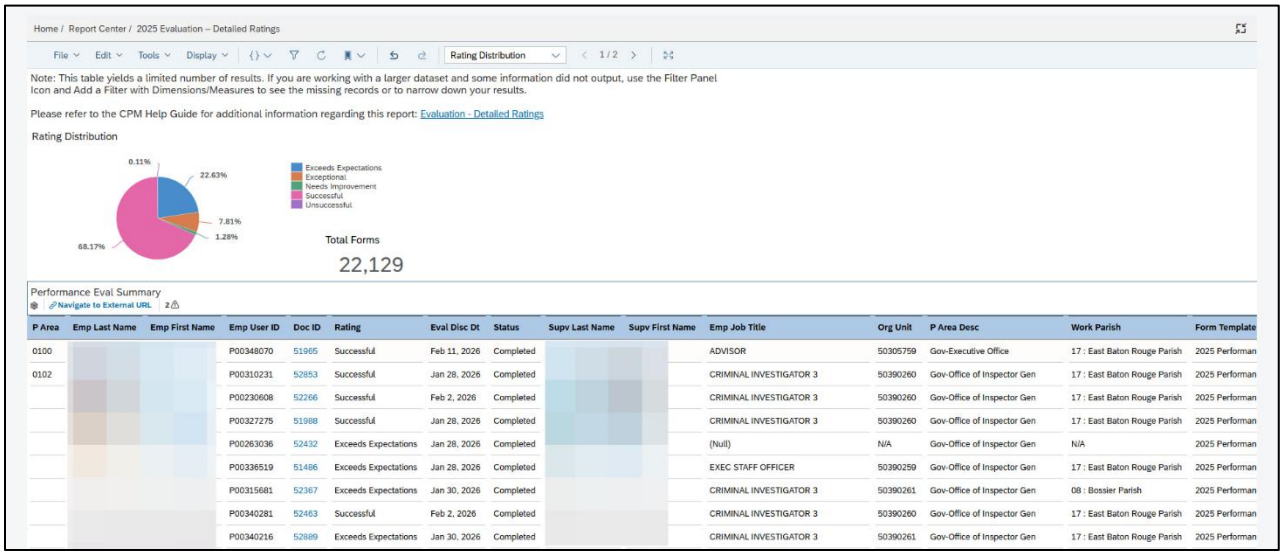
1. Locate and expand **CPM reporting folder**.



2. Expand **Detailed Ratings** and select the **applicable Performance Year report.**



3. Select the **Rating Distribution tab** to review employees' overall performance ratings and evaluation discussion dates (EVAL DISC DT).



4. **Use the report filters to narrow results by rating value** (e.g., Exceptional or Unsuccessful) or individual employee.

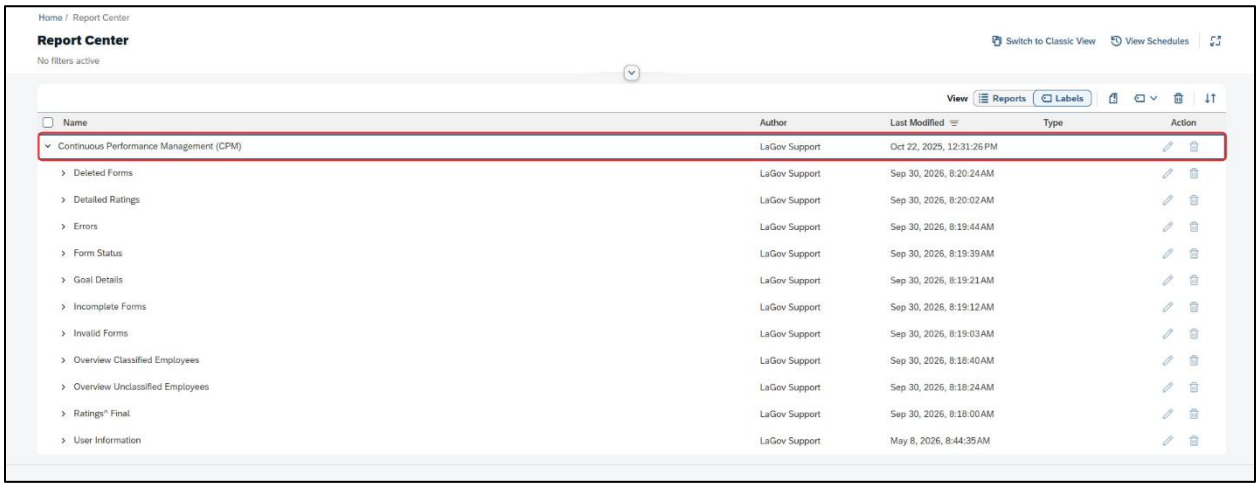
NOTE: Before reviewing the Goal Details tab, filter the report by a specific rating value or individual employee to narrow the results and make the information easier to review.



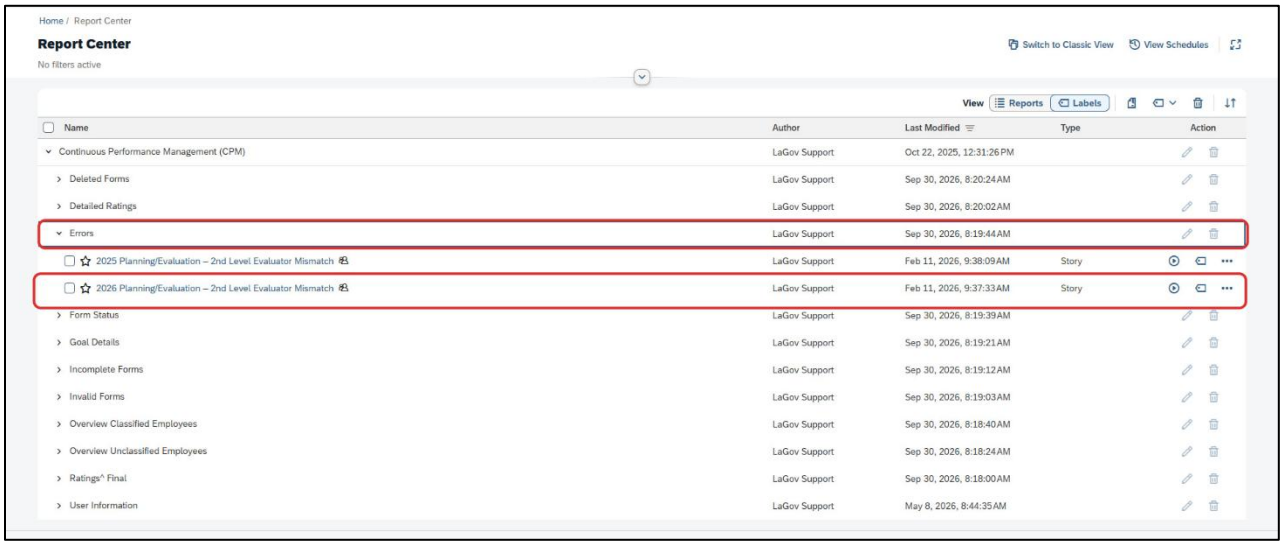
Errors Report

- **Purpose:** The Error Report identifies Performance Planning and Evaluation forms assigned to an incorrect 2nd Level Evaluator. Agency Administrators can use it to find forms that need correction and ensure they are routed to the appropriate evaluator.
- **When to Use:** Run the report quarterly, after changes to supervisory assignments, and regularly during Performance Planning and Evaluation periods.
- **Key Considerations:**
    - Incorrect assignments may result from changes in reporting relationships, personnel appointments, or employee separations.
    - Review and correct routing so forms can be completed on time.

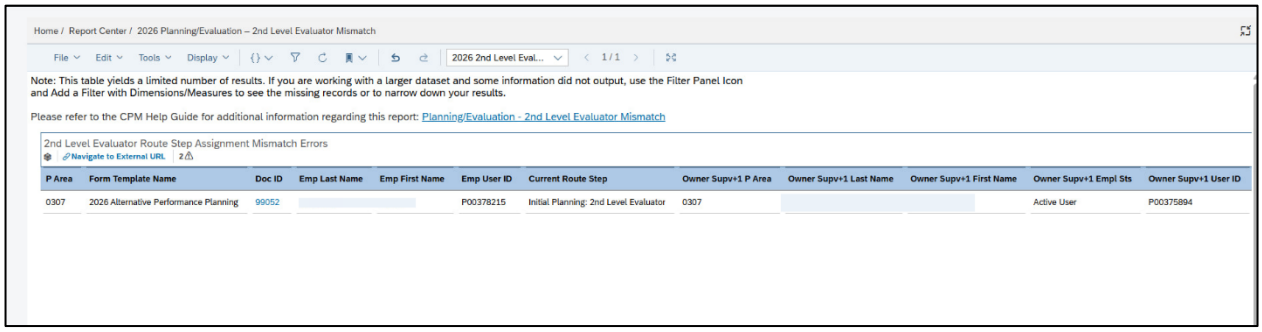
1. Locate and expand **CPM reporting folder.**



2. Locate and select **Error Report**. Select **the appropriate year.**



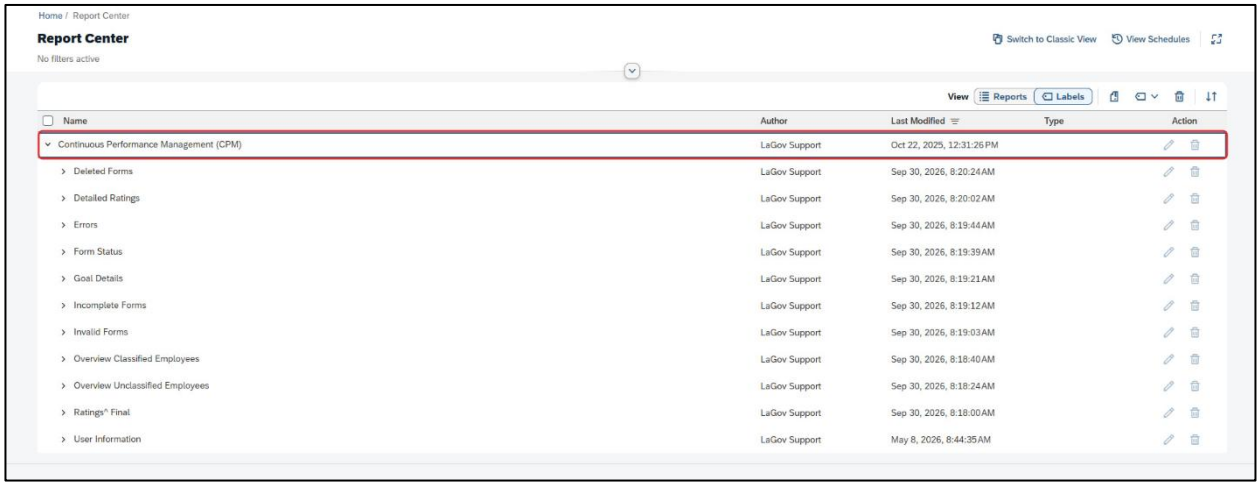
3. Review the report results to verify that the form is routed to the correct 2nd Level Evaluator.



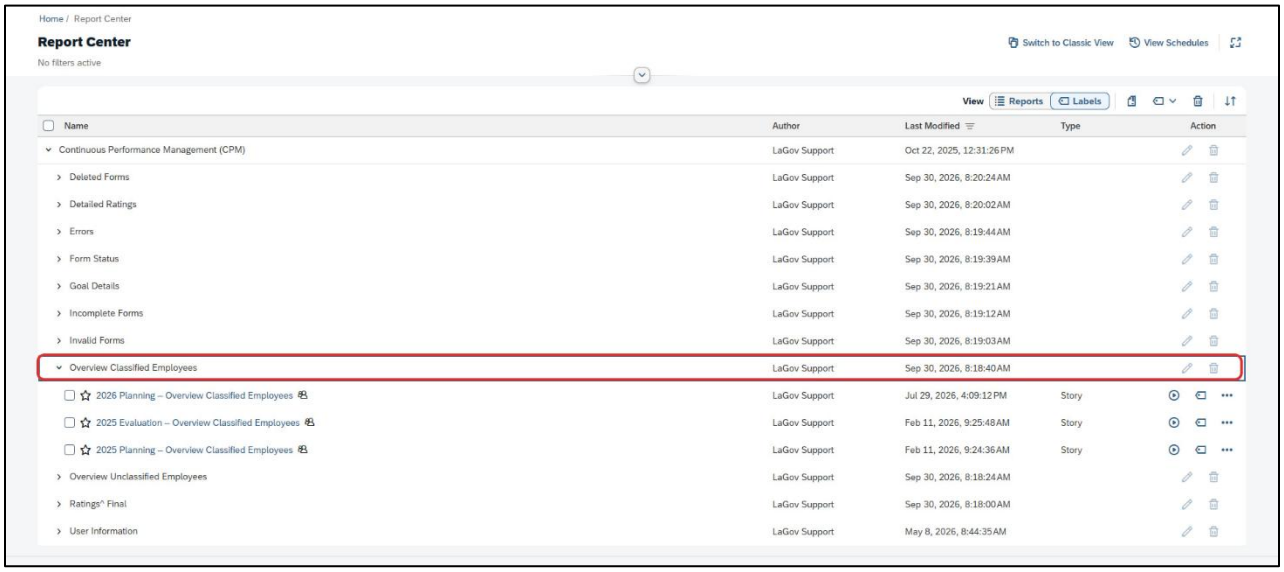
Overview Classified Employees & Overview Unclassified Employees Report

- **Purpose:** The Overview Classified Employees and Overview Unclassified Employees Reports provide employee information and the current status of launched Performance Planning and Evaluation forms. Agency Administrators can use them to determine whether employees require forms, monitor progress, and identify forms requiring follow-up.
- **When to Use:** Run the reports monthly, regularly during Performance Planning and Evaluation periods, and following personnel changes.
- **Key Considerations:**
    - Verify employee information and determine whether employees require forms for the Performance Year.
    - Monitor form completion and identify forms requiring follow-up.
    - Review personnel changes to identify employees who may require new forms.

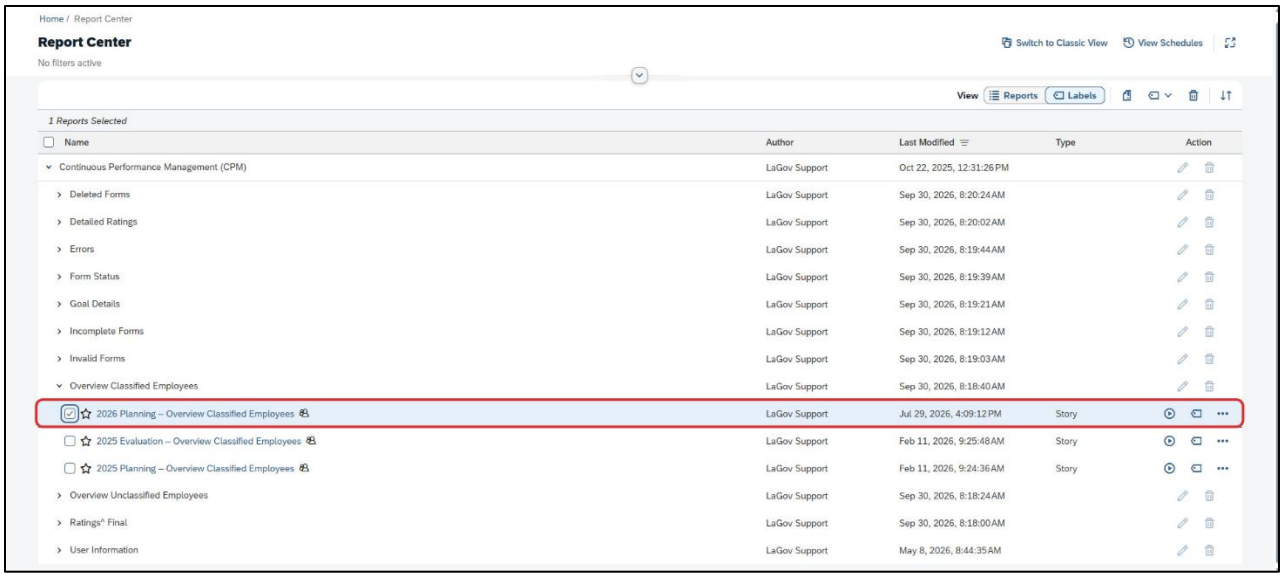
1. Locate and expand **CPM reporting folder.**



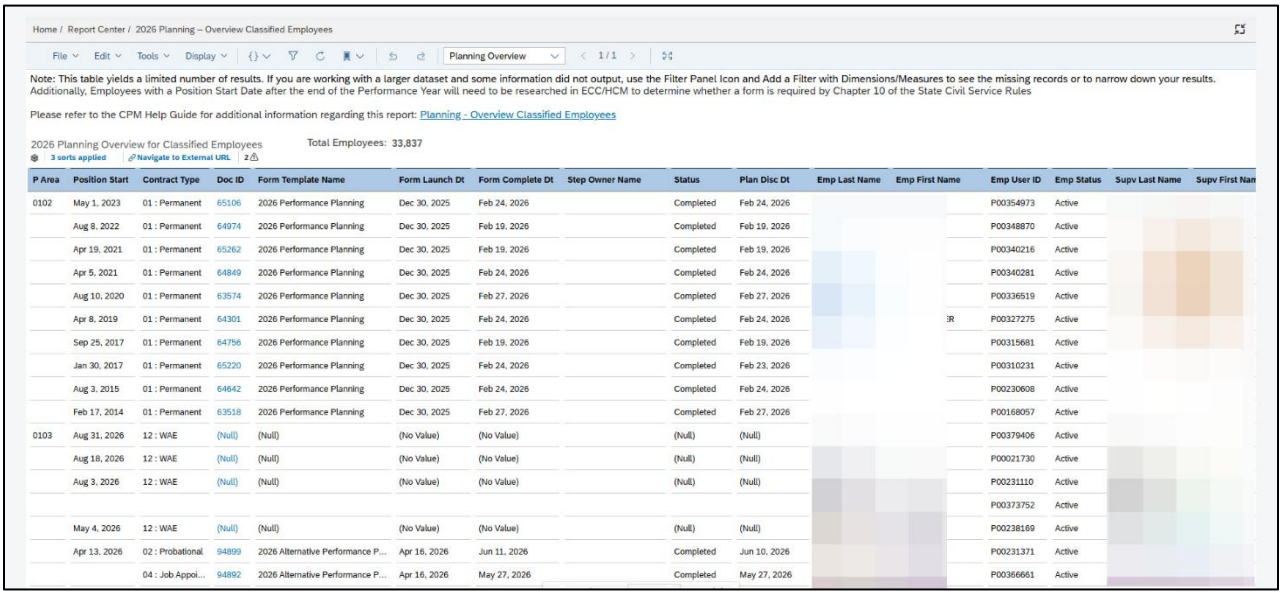
2. Select **Overview Classified Employees** or **Overview Unclassified Employees**, as applicable.



3. Review employee information to determine whether a form is required for the Performance Year.



4. Review the status of launched forms to identify those still in progress. Follow up with the appropriate supervisor or employee as needed



Home / Report Center / 2026 Planning – Overview Classified Employees

File Edit Tools Display Planning Overview 1 / 1

Note: This table yields a limited number of results. If you are working with a larger dataset and some information did not output, use the Filter Panel Icon and Add a Filter with Dimensions/Measures to see the missing records or to narrow down your results. Additionally, Employees with a Position Start Date after the end of the Performance Year will need to be researched in ECC/HCM to determine whether a form is required by Chapter 10 of the State Civil Service Rules

Please refer to the CPM Help Guide for additional information regarding this report: Planning - Overview Classified Employees

2026 Planning Overview for Classified Employees Total Employees: 33,837

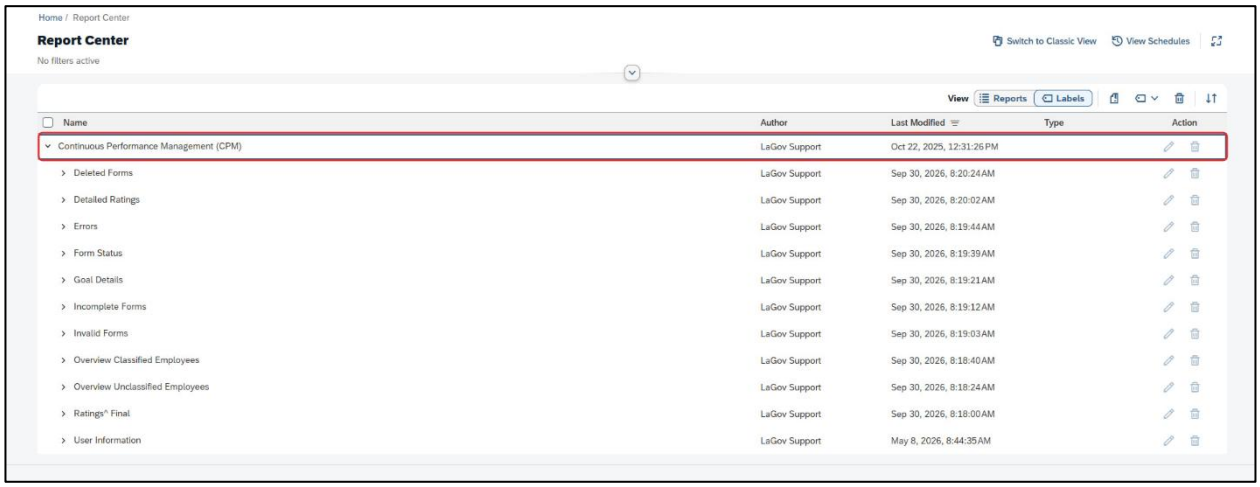
3 sorts applied Navigate to External URL 2

P Area	Position Start	Contract Type	Doc ID	Form Template Name	Form Launch Dt	Form Complete Dt	Step Owner Name	Status	Plan Disc Dt	Emp Last Name	Emp First Name	Emp User ID	Emp Status	Supv Last Name	Supv First Nam
0102	May 1, 2023	01 : Permanent	65106	2026 Performance Planning	Dec 30, 2025	Feb 24, 2026		Completed	Feb 24, 2026			P00354973	Active		
	Aug 8, 2022	01 : Permanent	64974	2026 Performance Planning	Dec 30, 2025	Feb 19, 2026		Completed	Feb 19, 2026			P00348870	Active		
	Apr 19, 2021	01 : Permanent	65262	2026 Performance Planning	Dec 30, 2025	Feb 19, 2026		Completed	Feb 19, 2026			P00340216	Active		
	Apr 5, 2021	01 : Permanent	64849	2026 Performance Planning	Dec 30, 2025	Feb 24, 2026		Completed	Feb 24, 2026			P00340281	Active		
	Aug 10, 2020	01 : Permanent	63574	2026 Performance Planning	Dec 30, 2025	Feb 27, 2026		Completed	Feb 27, 2026			P00336519	Active		
	Apr 8, 2019	01 : Permanent	64301	2026 Performance Planning	Dec 30, 2025	Feb 24, 2026		Completed	Feb 24, 2026		R	P00327275	Active		
	Sep 25, 2017	01 : Permanent	64756	2026 Performance Planning	Dec 30, 2025	Feb 19, 2026		Completed	Feb 19, 2026			P00315681	Active		
	Jan 30, 2017	01 : Permanent	65220	2026 Performance Planning	Dec 30, 2025	Feb 24, 2026		Completed	Feb 23, 2026			P00310231	Active		
	Aug 3, 2015	01 : Permanent	64642	2026 Performance Planning	Dec 30, 2025	Feb 24, 2026		Completed	Feb 24, 2026			P00230608	Active		
	Feb 17, 2014	01 : Permanent	63518	2026 Performance Planning	Dec 30, 2025	Feb 27, 2026		Completed	Feb 27, 2026			P00168057	Active		
0103	Aug 31, 2026	12 : WAE	(Null)	(Null)	(No Value)	(No Value)		(Null)	(Null)			P00379406	Active		
	Aug 18, 2026	12 : WAE	(Null)	(Null)	(No Value)	(No Value)		(Null)	(Null)			P00021730	Active		
	Aug 3, 2026	12 : WAE	(Null)	(Null)	(No Value)	(No Value)		(Null)	(Null)			P00231110	Active		
												P00373752	Active		
	May 4, 2026	12 : WAE	(Null)	(Null)	(No Value)	(No Value)		(Null)	(Null)			P00238169	Active		
	Apr 13, 2026	02 : Probational	94899	2026 Alternative Performance P...	Apr 16, 2026	Jun 11, 2026		Completed	Jun 10, 2026			P00231371	Active		
		04 : Job Appoi...	94892	2026 Alternative Performance P...	Apr 16, 2026	May 27, 2026		Completed	May 27, 2026			P00366661	Active		

Ratings^ Final Report

- **Purpose:** The Ratings Final Report displays all valid final performance ratings for employees in the selected Performance Year. Agency Administrators can use it to verify final ratings and identify duplicate Rating Replacement forms.
- **When to Use:** Review the report after ratings are finalized or when reviewing a prior Performance Year.
- **Key Considerations:**
    - Duplicate Rating Replacement forms must be deleted to ensure accurate reporting.
    - Performance Evaluation and Not Evaluated forms cannot be duplicated.
    - This is a historical report and remains available for review after the Performance Year closes.

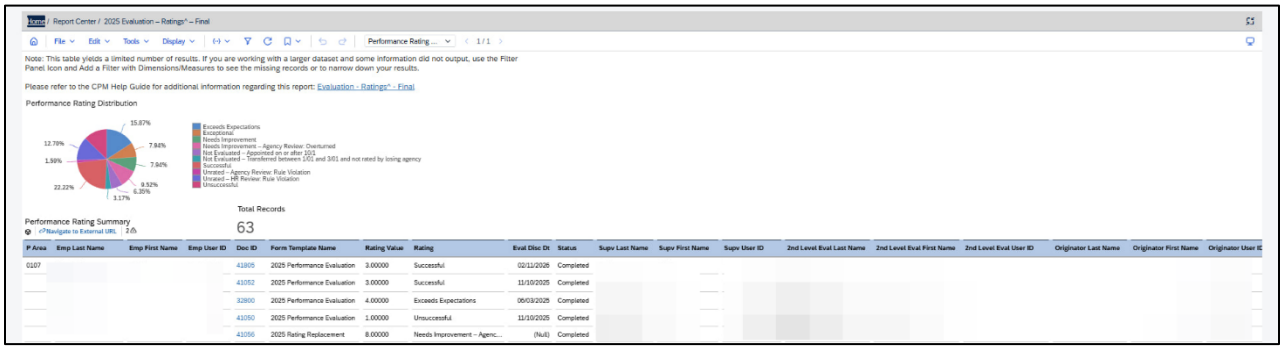
1. Locate and expand **CPM reporting folder.**



2. Locate and expand **Ratings^Final**. Then, select **the appropriate report year**.



3. Verify final ratings and identify duplicate Rating Replacement forms that must be deleted.



Report Questions/Issues

A complete descriptor for each report can be found in LaGov Help: Reports.

If submitting a Help Desk ticket for reporting, choose SUCCESSFACTORS>CPM-GOALS/PERFORMANCE MANAGEMENT>CS-REPORTING.

FAQs

SCS has created an extensive FAQ Guide. Click the link or scan the QR code to access the document on the SCS website.