SAP SuccessFactors

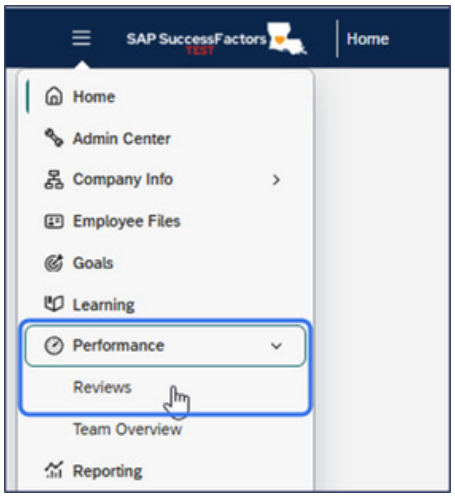
PLANNING PROCESS: 2ND LEVEL EVALUATOR ROLE

Rule 10.4 of the State Civil Service Rules outlines the responsibilities of the 2nd Level Evaluator in the CPM process. The 2nd Level Evaluator must concur with and approve the performance planning form and the performance evaluation form prepared by the Evaluating Supervisor.

1 NAVIGATE TO FORM

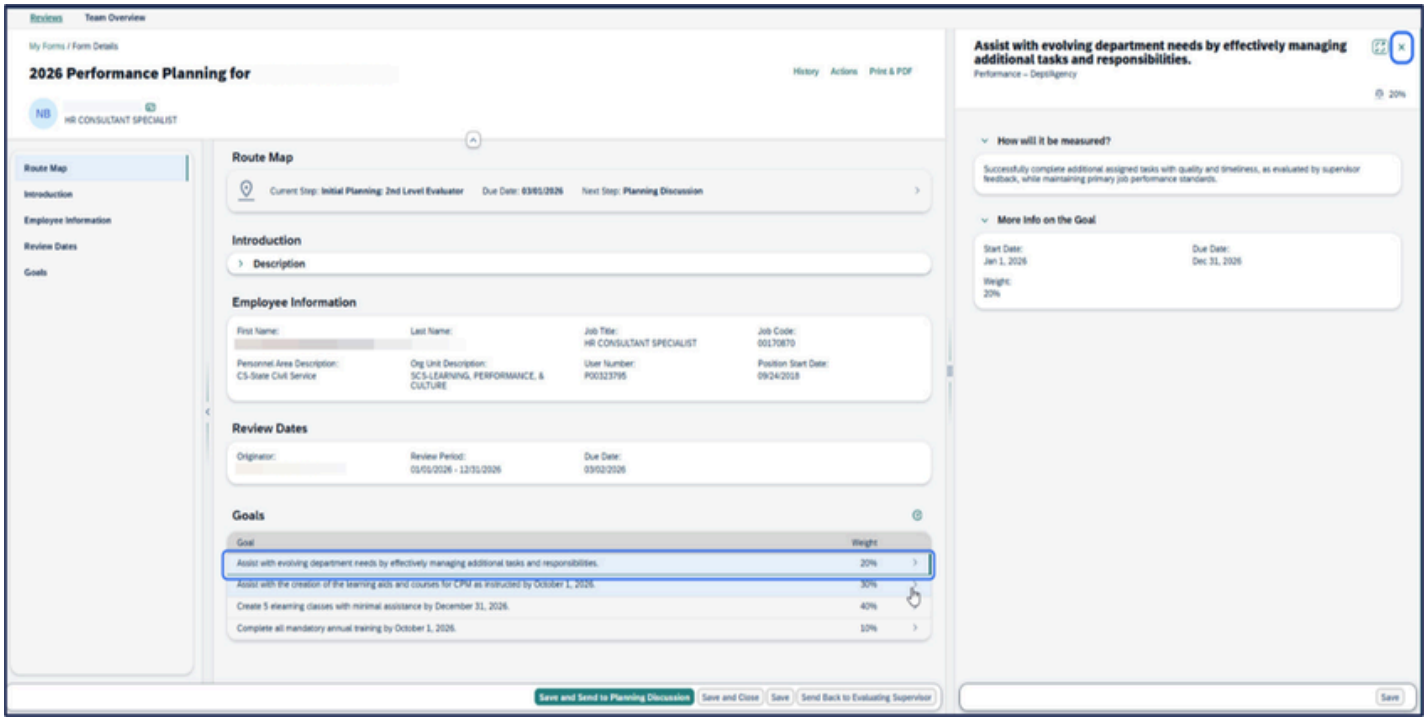
You can find your form either by:

- Clicking on **Performance** and, then, **Reviews** in the **Main Menu**. Open the correct CPM form in your inbox.
- On the dashboard, in the **Needs Attention** section, you will see forms that require action.



2 REVIEW GOALS

- Scroll down to the **Goals section** of the form to review the goals created for the employee.
- Review the Goals created for the employee. Select **each goal** or the **> to the right of the goal** to see all of the goal details. Select the X at the top right to close the side panel.



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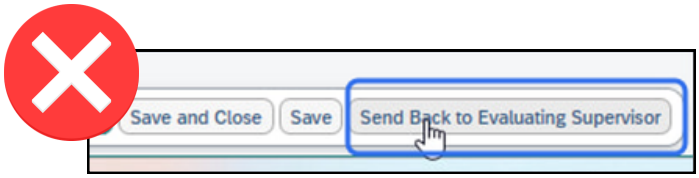
When reviewing goals, consider these questions:

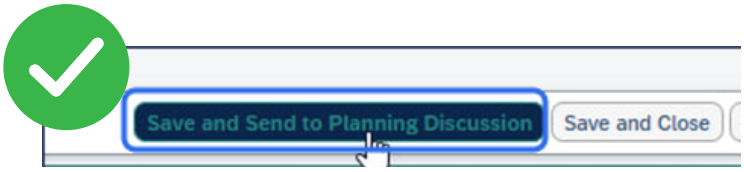
- Do the goals reflect the employee's actual work and responsibilities?
- Do the goals align with the employee's position description and relevant organizational priorities?
- Are the goals Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART)?
- Is it clear what the employee is expected to accomplish or how the employee is expected to perform?
- Does each metric clearly explain how progress and successful performance will be measured?
- Is the information needed to measure the goal reasonable to collect and review throughout the year?
- Are the goals achievable for this employee when considering workload, skills and experience, available resources, and support?
- Do the goal weights appropriately reflect the importance, impact, time commitment, or responsibilities associated with the goals, and do the weights total 100%?
- Are expectations reasonably consistent for employees performing similar work?

4 APPROVAL

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



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



Once you approve the form, several actions occur:

- The form is sent to **BOTH the supervisor and employee simultaneously**.
- The state of the Goal Plan changes to **APPROVED**. Goals cannot be added, edited, or deleted.