

Continuous Performance Management (CPM)

Performance Evaluation Guide For Supervisors



STATECIVILSERVICE

SAP SuccessFactors

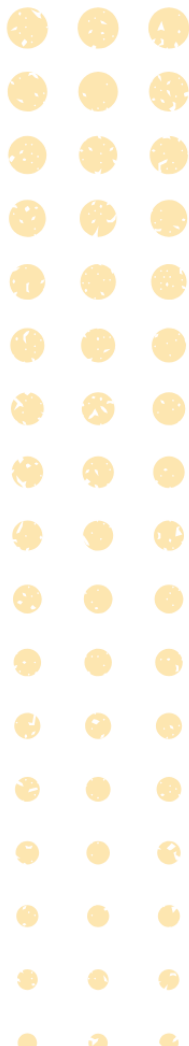


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ABOUT THIS GUIDE

This comprehensive guide includes information to help you understand and utilize the tools available within the Continuous Performance Management (CPM) in SuccessFactors.

Main sections will begin with the following:

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

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

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

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

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



IMPORTANT

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



REQUIRED

This symbol indicates the step is required.



BEST PRACTICE

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



2nd LEVEL APPROVAL

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

SCS CHAPTER 10

OVERVIEW

Continuous Performance Management (CPM) 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.

Continuous Performance Management shall consist of a minimum of the following components:

1. A performance planning form approved by the Director which is comprised of a minimum of two performance-based goals and one behavior-based goal;
2. A performance planning session during which the Evaluating Supervisor and the employee discuss the employee's planned goals for the performance evaluation year;
3. A performance evaluation form approved by the Director;
4. A performance evaluation session during which the Evaluating Supervisor and the employee discuss the results of employee's planned goals from the performance evaluation year;
5. An overall performance evaluation resulting in one of five possible ratings.

PERFORMANCE EVALUATION – SCS RULE 10.7

Performance evaluations sessions shall be conducted after the performance evaluation year has ended and rendered no later than March 1. All performance evaluation ratings shall be recorded with an effective date of January 1.

The Evaluating Supervisor shall base the evaluation of the employee's performance on the goals as stated on the performance planning form.

To render a performance evaluation, the Evaluating Supervisor shall:

1. Complete a performance evaluation form and session between January 1 and March 1.
2. Sufficiently support the performance evaluation rating with comments and attach supporting documentation as deemed appropriate. In the case of an "Unsuccessful" rating, comments and documentation combined must be sufficient to support the rating, any potential disciplinary action, and apprise the employee of deficiencies in sufficient detail for the employee to provide defense/explanation in an agency review or appeal setting.
3. Obtain the Second Level Evaluator's concurrence and signature on the performance evaluation form prior to discussion with the employee.
4. Discuss the evaluation with the employee. Following the discussion, the Evaluating Supervisor and the employee shall sign indicating the evaluation session occurred.
5. Provide the employee with a copy of or access to the completed performance evaluation form and any supporting documentation.

An employee cannot prevent the performance evaluation form from becoming official by refusing to attend the performance evaluation session and/or refusing to acknowledge the performance evaluation form. Should the employee refuse to attend the performance evaluation session and/or acknowledge the performance evaluation form, the Evaluating Supervisor shall document the refusal on the performance evaluation form.

PERFORMANCE MANAGEMENT BASICS

Performance Management is the ability to plan, monitor, and document employee performance throughout the year. A performance evaluation system provides structure to the communication that takes place between an employee and a supervisor. It gives both the supervisor and the employee guidelines on how to talk about performance, goals, and necessary improvements.

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

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

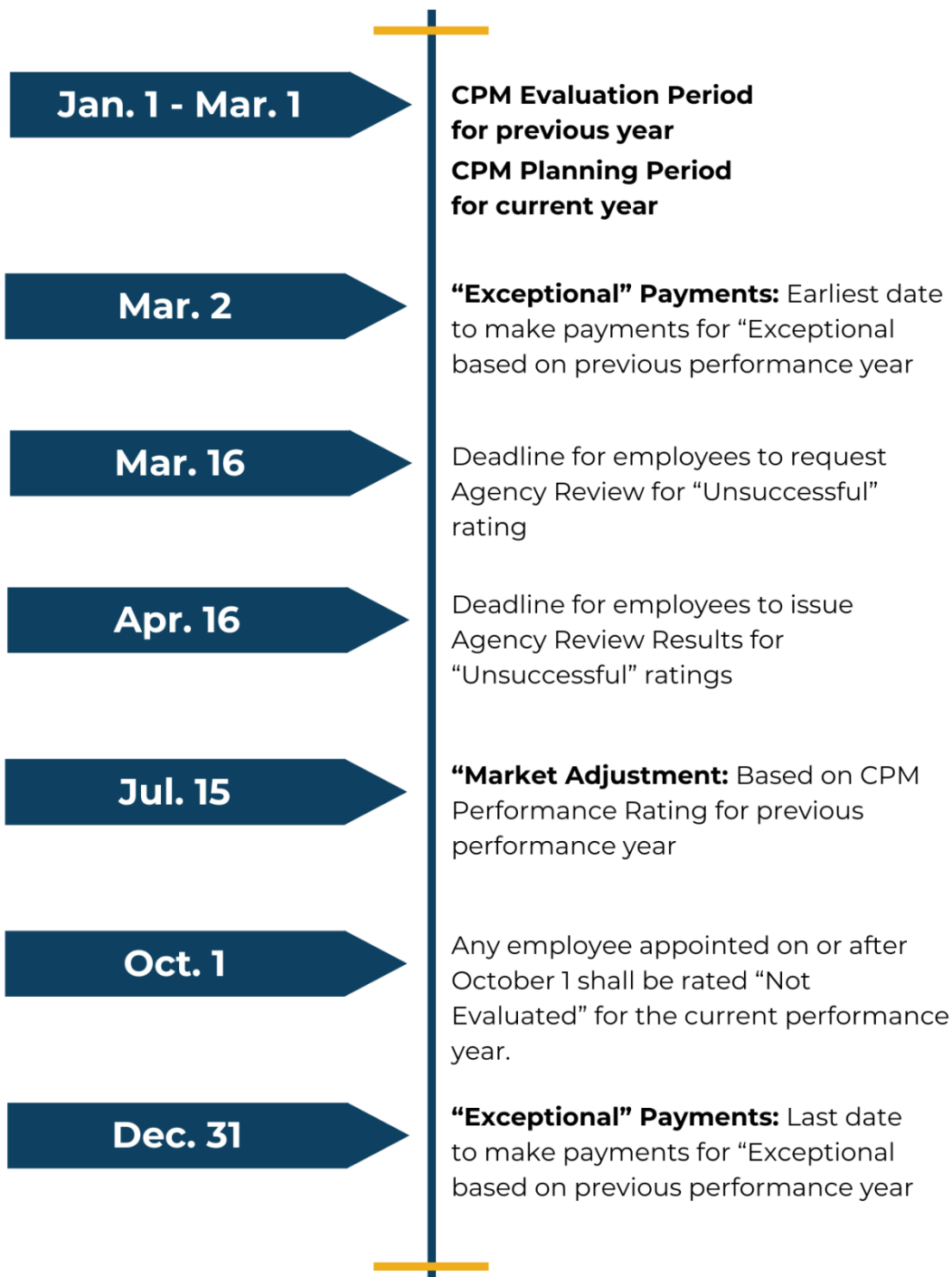
Think of performance management as a roadmap. The goals set at the beginning of the year are the destination, and the ongoing check-ins are the stops along the way that keep both employees and supervisors on track. When supervisors use CPM effectively, employees have a clearer sense of direction, fewer detours, and a stronger understanding of how their work connects to the agency's mission. This approach turns performance evaluation into more than a compliance exercise—it becomes a tool to guide progress and growth throughout the year.

Beyond the mechanics, performance management is about building a culture of accountability and growth. It keeps supervisors and employees aligned, ensures progress is measured against clear standards, and creates a shared understanding of what success looks like. Done consistently, CPM shifts performance management from a once-a-year event to an ongoing process that supports both day-to-day operations and long-term agency goals.





CPM Calendar



CONTINUOUS PERFORMANCE EVALUATION



WHAT: CPM Evaluation is a multi-step process that begins with the supervisor rating and documenting the employee's performance for each goal on the Performance Evaluation Form.

The supervisor, then, sends the completed form to the 2nd Level Evaluator for review and approval. The approved form is sent back to the supervisor who, then, schedules and conducts an Evaluation Discussion with the employee. The supervisor documents the date and results of the planning discussion. The form is then sent to the employee to sign.

WHEN: Performance Evaluation occurs between January 1st and March 1st of every year.

WHY: There are many reasons to evaluate an employee's performance. A clear evaluation helps employees understand expectations, recognize their achievements, and see where improvement is needed. Also, under State Civil Service Rules, ratings can impact an employee's ability achieve permanent status, to be promoted, to progress in a Career Progression Group, to be placed on the Department's Preferred Reemployment List, and to be eligible for a market adjustment.

For supervisors, it creates a record of performance that can guide coaching, identify development opportunities, and support fair decision-making about promotions, training, or assignments. On a broader level, evaluations strengthen the agency by aligning individual performance with team and organizational goals. When done well, performance management can improve an agency's ability to retain employees, upskill them, and maintain succession planning.

Research shows that employees who receive thoughtful feedback, opportunities for practice, and safe spaces to learn tend to remain and advance with the organization. These employees generally perform better and promote faster than their counterparts in organizations that do only the minimum tasks of performance evaluation.

In short, evaluation is more than closing out the year with a rating. It is the point where planning, feedback, and performance evidence come together to create a fair record of achievement. When supervisors approach it with clarity, fairness, and consistency, the process not only supports individual development but also builds stronger teams and helps agencies deliver on their mission.

RATING SCALE REVIEW

Using a rating scale creates a quantifiable view of performance. This data can help agencies make decisions about how to manage and develop its employees. Ratings can help agencies review their talent base as a whole, identify skill gaps, create plans for improvement, track workforce trends, etc.

On the supervisor-employee level, ratings, when done properly, can provide a useful indicator of performance. This can help supervisors focus their development discussions and create opportunities for employee growth. Ratings can, also, help employees identify areas where development is necessary.

SCS RULE 10.6

According to SCS Rule 10.6, the Evaluating Supervisor shall assign one of the five ratings listed below based on the employee's overall satisfaction of position requirements. Position requirements include, but are not limited to, performance, behavior, and quality/quantity of work. While consistency is a consideration, an extraordinary outcome or egregious conduct may cause a rating to be "Exceptional" or "Unsuccessful".

1. Exceptional: Consistently exceeds position requirements
2. Exceeds Expectations: Occasionally exceeds the position requirements
3. Successful: Meets position requirements
4. Needs Improvement: Occasionally fails to meet position requirements
5. Unsuccessful: Consistently fails to meet position requirements

Supervisors may also assign a "Not Evaluated" rating if:

1. An employee who is appointed on or after October 1 of the performance evaluation year shall be assigned a "Not Evaluated" rating.
2. When an employee transfers between January 1 and March 1, the gaining agency shall be responsible for assigning a rating of "Not Evaluated" to an employee who has not been rated by the losing agency as of the effective date of the transfer.
3. A "Not Evaluated" rating shall have the same effect as a "Successful" rating.

An "Unrated" rating is assigned:

1. When an evaluation is in violation of these rules, the Human Resources Office shall assign an "Unrated" rating to the employee..
2. In the absence of a performance evaluation, the Human Resources Office shall assign an "Unrated" rating to the employee.
3. An "Unrated" rating shall have the same effect as a "Successful" rating.

EVALUATING YOUR EMPLOYEE'S GOALS

PERFORMANCE EVALUATION GUIDELINES

Evaluations should be objective and comprehensive. Ratings must reflect the employee's performance, not personality traits or the quality of the working relationship with the supervisor. Personal opinions or preferences should not influence the outcome.



Evaluations must also account for performance across the entire year rather than focusing only on recent activity. A fair evaluation considers patterns and results throughout the full performance cycle, not just the final weeks leading up to the evaluation.

An evaluation is limited to the goals included on the employee's Performance Planning Form and Performance Evaluation Form. If a goal was not included on the planning form, it cannot be evaluated.

Each goal must also be evaluated as written. Goals cannot be changed after the fact, nor can new descriptors be added. Employees cannot be evaluated on anything not included in the goal or the metric, and performance targets cannot be moved at the end of the year. The standard is exactly what was written on the planning form. Any deviation undermines fairness and credibility and places the agency at risk in an appeal. This is why clarity at the planning stage is essential.

Consistency across employees is also critical. Employees in similar roles must be held to the same standards. Behaviors or results that are rewarded for one employee must be rewarded for others, and what is unacceptable for one must be unacceptable for all. Inconsistency quickly undermines trust. Consistency does not mean evaluations are identical, but it does mean the same standards are applied across comparable roles and situations.

A STEP-BY-STEP PROCESS FOR EVALUATING GOALS

Step 1: Review the metric.

The supervisor should look at the metric tied to the goal. Metrics define how success is measured (e.g., numbers, percentages, descriptors like “accurately” or “on time”). This ensures performance is evaluated against what was agreed upon at the start of the year and this, also, reminds you what data needs to be collected.

Step 2: Gather evidence.

The supervisor should collect all relevant information about the employee’s performance as related to the goal and the metric. This includes documentation from throughout the year—reports, check-in notes, system data, or other records. The employee should submit documentation for any goals they were responsible for tracking, as well as their list of other duties as assigned. The more evidence that is available, the clearer the evaluation will be.



Step 3: Review the evaluation scale.

The supervisor should use the evaluation scale to determine where the employee’s performance falls. If a specific scale for the goal was created during planning, it should be used now—that eliminates guesswork. If not, one may need to be drafted at evaluation time, though this increases the risk of relying on recent events or personal impressions instead of a full-year view.

The scale should be based on the official definitions:

- 5 = Exceptional: Consistently exceeds position requirements.
- 4 = Exceeds Expectations: Occasionally exceeds position requirements.
- 3 = Successful: Meets position requirements.
- 2 = Needs Improvement: Occasionally fails to meet position requirements.
- 1 = Unsuccessful: Consistently fails to meet position requirements.

Step 4: Decide the rating.

Achieving the goal as written is considered “Successful”—nothing more, nothing less. Ratings should not be inflated because the employee worked hard or because the supervisor has a positive relationship with them. Likewise, ratings should not be lowered due to unrelated frustrations. Instead, the supervisor should use the scale definitions to determine whether performance went above, below, or right at the standard:

- **Start at “Successful.”** If the employee met the goal as written, the default rating is Successful.
- **Look for patterns above or below.** If the employee exceeded the standard consistently or occasionally, the rating may move into “Exceeds Expectations” or “Exceptional.” If they failed to meet it occasionally or consistently, the rating shifts to “Needs Improvement” or “Unsuccessful.”
- **Anchor to evidence.** Documentation, reports, check-in notes, or observed behaviors should be matched against the wording of the scale. For example, did the employee consistently exceed requirements, or was it only once or twice? Did they occasionally fail, or was it a repeated pattern throughout the year?

Step 5: Write the justification for the rating.

Once the rating is decided, the next step is writing the justification to add to the “Comments” section for each goal. The justification explains why the rating was assigned. Supervisors should use the scale and supporting documentation to create this justification.

- **Open with the rating.** Identify whether the employee’s performance was Exceptional, Exceeds Expectations, Successful, Needs Improvement, or Unsuccessful, based on the scale you created.
- **Support with evidence.** Point to documentation, reports, observed behaviors, or notes that illustrate how the employee performed.
- **Summarize what the evidence shows overall, reinforcing why the rating is appropriate.**

For example: Joe’s performance on this goal was **Successful**. Joe usually accepted feedback and made improvements, but not consistently. For example, after coaching on report formatting in March, Joe corrected the reports in the following months; however, accuracy issues continued into late summer. Overall, Joe demonstrated progress but did not consistently maintain the improvements across the year.

APPROACHES TO EVALUATING BEHAVIOR GOALS

When evaluating behavior-based goals, supervisors should keep in mind that these are often about growth and development rather than strictly task completion. Because of that, the way you evaluate behaviors may look a little different from performance goals tied to numbers or deadlines. Here are some approaches to keep in mind:



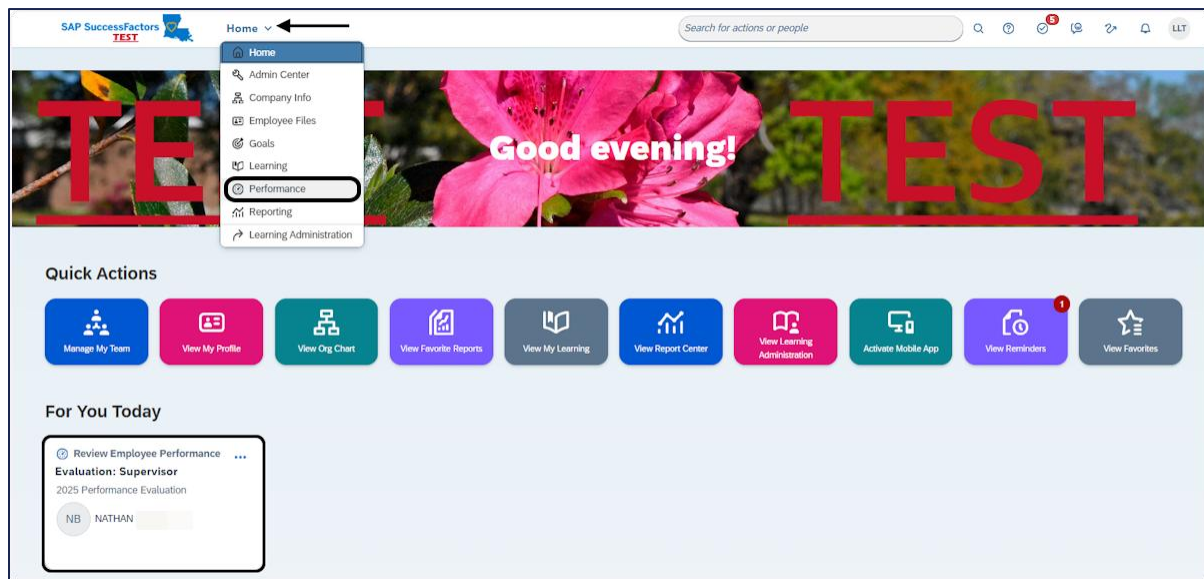
1. **Recognize that behaviors take time to develop.** Many behaviors require repeated practice and experience before they become habits. Progress may span more than one performance year, so keep expectations realistic.
2. **Evaluate effort as well as results.** If an employee is actively working to improve a behavior, applying feedback, and showing growth—even if mastery hasn’t been reached—this should be recognized in the rating. Avoid penalizing honest effort at the end of the year if progress is being made.
3. **Focus on observable actions.** Keep the evaluation as objective as possible by describing what you have seen and heard. Anchor the discussion to specific examples of behavior rather than subjective impressions or personality traits.
4. **Provide room for practice.** True growth often requires opportunities to try, fail, and adjust. Build in safe spaces for practice by offering extra time on new tasks, coaching moments, or lower-stakes opportunities to apply the behavior before it is formally assessed.

By approaching behavior goals with this balance—recognizing effort, focusing on evidence, and allowing space for growth—you set the stage for honest evaluations that support development while still holding employees accountable.

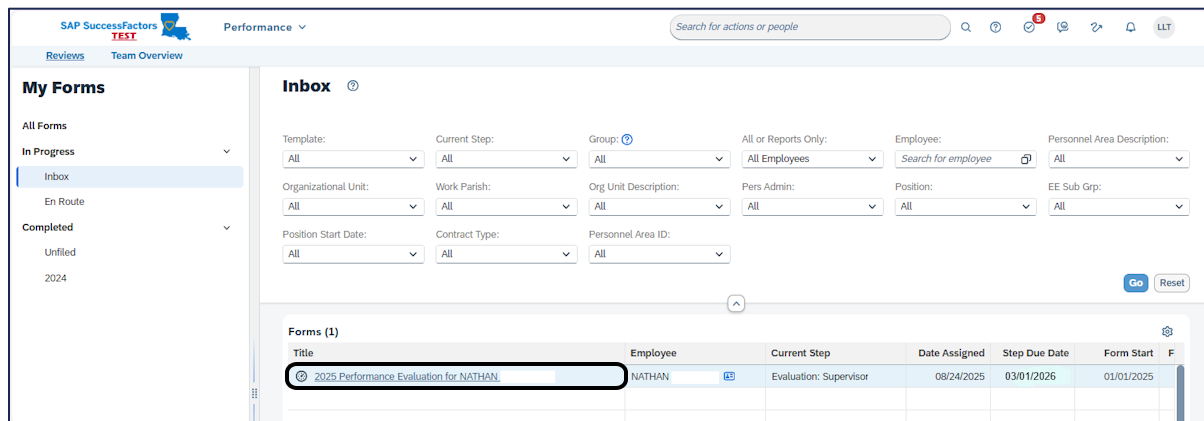
COMPLETING PERFORMANCE EVALUATION FORMS IN SUCCESSFACTORS

NAVIGATING TO PERFORMANCE FORMS

1. **Navigate to the correct Performance Evaluation Form. Navigation Option 1: Click on "Performance" in the Home menu. Navigation Option 2: Click on the correct tile in the "For You Today" section.**



2. **From your "In Progress - Inbox," click on the correct Performance Evaluation form.**



UNDERSTANDING THE PERFORMANCE EVALUATION FORM

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

NOTE: Action availability changes with each step. Actions may include "Legal Scan the entire form" and "Info about this form." Clicking on "Info about this form" will display the form "Properties" and "Approval Chain."



SAP SuccessFactors TEST Performance

Reviews Team Overview

Back to: Inbox

2025 Performance Evaluation for NATHAN

NATHAN BARNABA Rating 10

Route Map Introduction Employee Information Review Dates Goals Summary Section

Actions History

- Legal Scan the entire form
- Info about this form

2. Click "History" then "Performance form history" to see the date, person, and action for every instance this form was modified.

SAP SuccessFactors TEST Performance

Reviews Team Overview

Back to: Inbox

2025 Performance Evaluation for NATHAN

NATHAN Rating 10

Route Map Introduction Employee Information Review Dates Goals Summary Section

Actions History

- Performance form history
- 360 form history

3. Click this icon to print.

SAP SuccessFactors TEST Performance

Reviews Team Overview

Back to: Inbox

2025 Performance Evaluation for NATHAN

NATHAN Rating Overall Score 10 Incomplete Items

Route Map Introduction Employee Information Review Dates Goals Summary Section

Actions History

4. A new window will open. You can select which sections you would like to print. Click “PRINT.”

Print Setup

Sections to include

- ☒ All Sections
- ☒ Introduction
- ☒ Employee Information
- ☒ Review Dates
- ☒ Goals
- ☒ Summary Section

☒ Include section introductions

☒ Include sections details (where applicable)

Print Cancel

2025 Performance Evaluation for NATHAN

Introduction

Welcome to the 2025 Continuous Performance Management (CPM) Evaluation Form. The state of Louisiana for the first time in Q1 of 2026 (January-March) to evaluate the 2025 Performance year. State Civil Service the Office of Technology Services (OTS), has developed this tool with the purpose of providing state employees with a system of ensuring that evaluations are timely, goal-based, objective, and comprehensive. CPM process with on-demand performance indicators for both the CPM process and the performance of state employees as individuals. Chapter 10 of the SCS rules define the roles and processes used in evaluating performance rules and allows supervisors, 2nd level evaluators, and employees to track and see evaluation forms on mobile devices.

Employee Information

First Name	NATHAN	Last Name	
Job Title	HR CONSULTANT SPECIALIST	Job Code	

5. Click this icon to create a PDF of the form.

SAP SuccessFactors Performance

Search for actions or people

Reviews Team Overview

Back to: Inbox

2025 Performance Evaluation for NATHAN

Changes saved. Actions History PDF

NATHAN Rating 10

Route Map Introduction Employee Information Review Dates Goals Summary Section

6. A new window will open. You can select which sections you would like to appear on the PDF. Click “Show PDF” to create it. It will open in a separate browser tab. From that window, you can download or print the form.

Print Setup

Sections to include

- ☒ All Sections
- ☒ Introduction
- ☒ Employee Information
- ☒ Review Dates
- ☒ Goals
- ☒ Summary Section

☒ Include section introductions

☒ Include sections details (where applicable)

Show PDF Cancel

2025 Performance Evaluation for NATHAN

Introduction

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Employee Information

First Name	NATHAN	Last Name	
Job Title	HR CONSULTANT SPECIALIST	Job Code	

7. Click on this icon to save your progress on the form. It does not allow you to save the form to your computer.

The screenshot shows the SAP SuccessFactors Performance evaluation interface for NATHAN. The top navigation bar includes 'SAP SuccessFactors', 'Performance', and a search bar. Below the navigation bar, the title '2025 Performance Evaluation for NATHAN' is displayed. The main content area shows a profile card for NATHAN with a 'Rating' of 10 and an 'Incomplete Items' button. The 'Incomplete Items' button is highlighted with a red circle. The bottom navigation bar includes 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', 'Goals', and 'Summary Section'.

8. Click on "Incomplete Items" to see the list of tasks that must be completed before this form can be sent to your 2nd Level Evaluator.

The screenshot shows the SAP SuccessFactors Performance evaluation interface for NATHAN. The top navigation bar includes 'SAP SuccessFactors', 'Performance', and a search bar. Below the navigation bar, the title '2025 Performance Evaluation for NATHAN' is displayed. The main content area shows a profile card for NATHAN with a 'Rating' of 10 and an 'Incomplete Items' button. The 'Incomplete Items' button is highlighted with a red circle. The bottom navigation bar includes 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', 'Goals', and 'Summary Section'.

9. Use the tab bar at the top of the form to navigate to specific sections.

The screenshot shows the SAP SuccessFactors Performance evaluation interface for NATHAN. The top navigation bar includes 'SAP SuccessFactors', 'Performance', and a search bar. Below the navigation bar, the title '2025 Performance Evaluation for NATHAN' is displayed. The main content area shows a profile card for NATHAN with a 'Rating' of 10 and an 'Incomplete Items' button. The 'Route Map' tab in the bottom navigation bar is highlighted with a red circle. The bottom navigation bar includes 'Route Map', 'Introduction', 'Employee Information', 'Review Dates', 'Goals', and 'Summary Section'.

10. The Route Map illustrates the entire Continuous Performance Management (CPM) form workflow. The Route Map breaks the process into three parts: Assessment, Signature, and Completed.



NOTE: A green circle with a check indicates that step has been completed. The blue circle shows where the form is now. The icon with two people indicates a collaborative step in which multiple people are required to complete an action.

The screenshot shows the '2025 Performance Evaluation for NATHAN' form in SAP SuccessFactors. The 'Route Map' section is highlighted, showing a sequence of steps: 1. Evaluation: Supervisor (due 07/31/2025), 2. Evaluation: 2nd Level Evaluator, 3. Evaluation: Discussion, and 4. Employee. The first step is highlighted with a blue circle and a green checkmark, indicating it is the current step and has been completed. The route map is divided into three sections: Assessment, Signature, and Completed.

11. The Summary Section shows the “Overall Form Rating,” “Adjusted Calculated Form Rating,” as well as the rating and weight of each goal.

NOTE: The system automatically calculates the employee's overall score based on the ratings assigned by the supervisor. The system is designed so the “Overall Form Rating” is equal to the “Adjusted Calculated Form Rating.”

The screenshot shows the '2025 Performance Evaluation for NATHAN' form in SAP SuccessFactors. The 'Summary Section' is highlighted, showing the 'Overall Form Rating' and 'Adjusted Calculated Form Rating' as 'Rating'. Below this, a table lists goals with their respective ratings and weights.

Name	Rating	Weight
Goals		100.0% of total score
Create 5 elearning classes with minimal assistance by December 31, 2025	Select a rating...	40.0%
Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2025.	Select a rating...	20.0%
Assist with evolving department needs by effectively managing additional tasks and responsibilities.	Select a rating...	20.0%
Complete the SCS CPTP Leadership Academy by November 1, 2025.	Select a rating...	10.0%
Improve time management skills by submitting all courses by the assigned deadline.	Select a rating...	10.0%

COMPLETING THE PERFORMANCE EVALUATION FORM



When you open the Performance Evaluation Form, you will note that Goals from the Goal Plan / Planning Form have been added automatically.

1. Click on “Goals” at the top of the page or scroll down until you reach the Goals section of the form.


2. Click the "?" Icon to review the Rating Scale, if necessary.

3. Based on the employee's performance and the documentation collected, rate the employee's performance for each goal. Click on the appropriate circle for the rating selected.




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

Performance

Assist with evolving department needs by effectively managing additional tasks and responsibilities. 

20.0% of total score

Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance

* Supervisor Rating 


☒ ☐ ☐ ☐ ☐ Exceeds Expectations

4. Type your justification for this rating in the "Supervisor's Comments" field. You can use the toolbar above the comment box to format your text.




NOTE: You are required to comment on each goal. The form will not route unless this is complete. Your comments must be between 10 and 4000 characters. If you do not meet the minimum, no data will be saved in this field.

Performance

Assist with evolving department needs by effectively managing additional tasks and responsibilities. 












20.0% of total score

Successfully complete additional assigned tasks with quality and timeliness, as evaluated by supervisor feedback, while maintaining primary job performance sta

* Supervisor Rating 

☒ ☐ ☐ ☐ ☐ Exceeds Expectations

* Supervisor's Comments

He completed these additional duties:


- He made a significant impact this year by stepping in to help Sue complete her project, providing steady support that ensured the work was finished on time and at a high standard.
- Beyond his primary responsibilities, he volunteered to serve on the Workforce Committee, showing a strong commitment to the agency's broader mission and a willingness to take on leadership roles that benefit the organization as a whole.
- He also created three polished and engaging videos for the agency's awards, which showcased both his creativity and technical skills while elevating the visibility of our programs.

These efforts demonstrate his ability to balance primary job performance with additional tasks of real value, highlighting his initiative, collaboration, and dedication. While his contributions were outstanding and went well beyond expectations, opportunities remain for him to broaden the overall reach and impact of these efforts, leading to a strong rating of 4.

5. Repeat steps 3 & 4 for each goal on the form.




Performance

Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2025. 









20.0% of total score

All deliverables must meet project guidelines and deadlines.

* Supervisor Rating 

● ● ● ● ● Exceptional

* Supervisor's Comments

B i U |     |   S  

He exceeded expectations by creating 7 tutorials, a comprehensive manual, and multiple job aids to support the CPM courses, all completed well in advance of the October 1, 2025 deadline. His work went far beyond simply assisting—he demonstrated initiative, creativity, and ownership in the development of materials that were both high quality and practical for learners. By anticipating the needs of supervisors and employees, he ensured the resources were accessible, easy to use, and directly aligned with the goals of the CPM program. This level of thoroughness and professionalism not only met the requirements of the goal but elevated the entire training effort, making a lasting contribution that reflects exceptional performance.









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

6. Add “Overall Comments on Goal Achievement.”

Note: This is not required. Use this space to comment on how well the employee met their goals as a whole.

Overall Comments on Goal Achievement

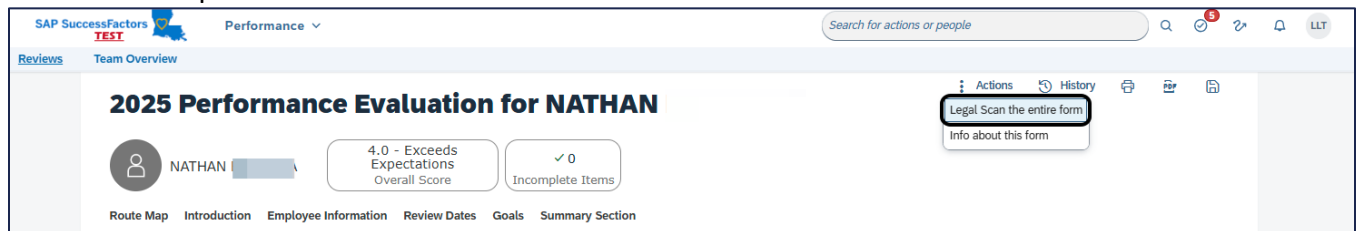
Supervisor's Comments

B i U |     |   S  

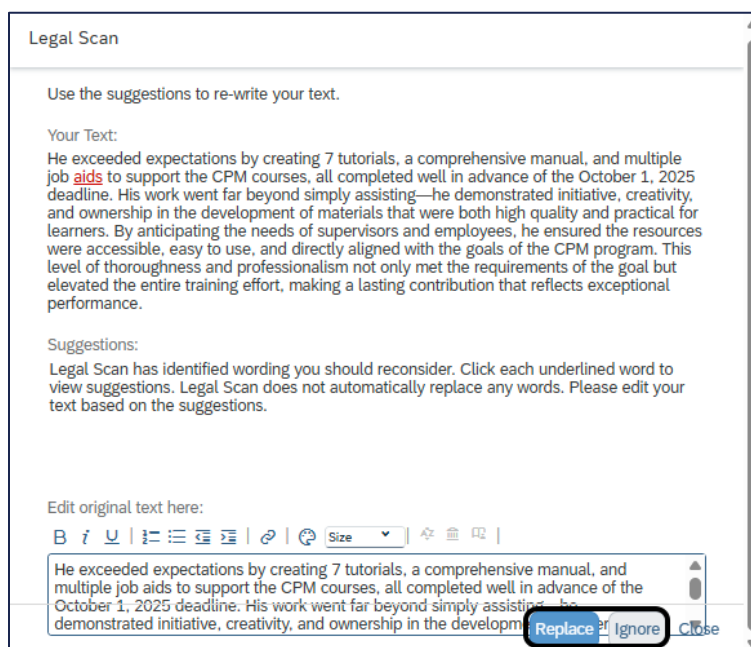
Overall, he consistently met or exceeded expectations across his goals, delivering high-quality work on schedule and often ahead of deadlines. He demonstrated initiative by taking on additional projects, supporting colleagues, and volunteering for committees, all while maintaining strong performance in his primary responsibilities. His contributions reflect reliability, creativity, and a strong commitment to the success of both his team and the broader organization.

- Once you have added all of your comments, you may want to do a Legal Scan to ensure your language is appropriate. To do this, scroll to the top of the document, click on “Actions” then “Legal Scan.”

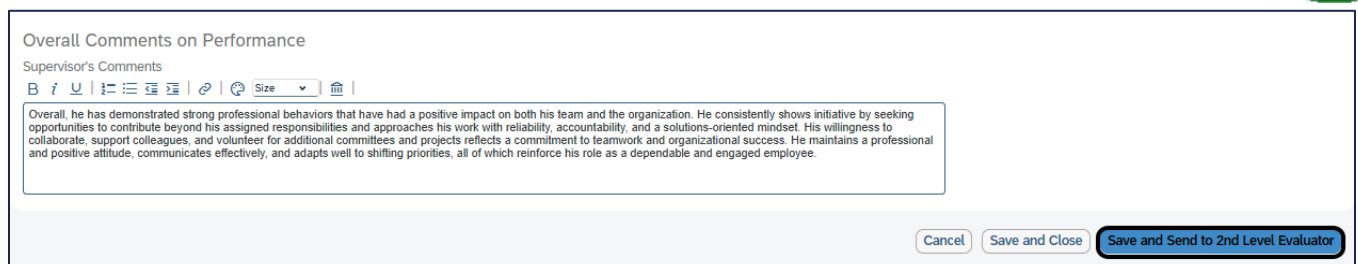
NOTE: This is optional.



- A separate window will open. Revise as needed.



- If you are finished with the form, scroll to the bottom and click “Save and Send to 2nd Level Evaluator.” If you would like to continue to work on the form, click "Save and Close."



NOTE: Once you send the form to the 2nd Level Evaluator, you will be able to view the form, but you will not be able to edit the form in any way.

12. A confirmation window will open. Click "Save and Send to 2nd Level Evaluator" if you are finished with the form.



Save and Send to 2nd Level Evaluator

You're about to send this form to the next person(s) specified in the workflow.

Forward Form to GLYN

Save and Send to 2nd Level Evaluator

Cancel & Return to Form

2ND LEVEL EVALUATOR'S ROLE – EVALUATION

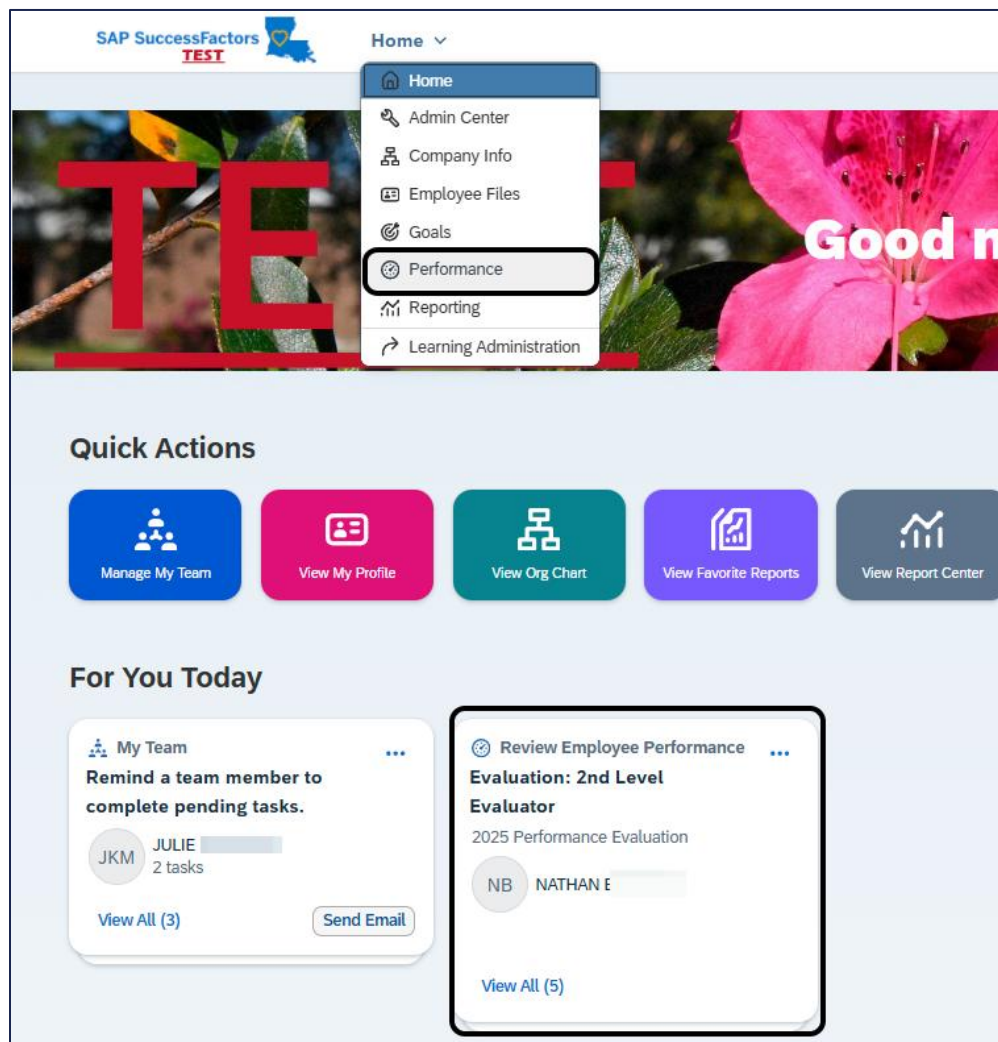
The 2nd Level Evaluator has two important responsibilities in the performance evaluation process:



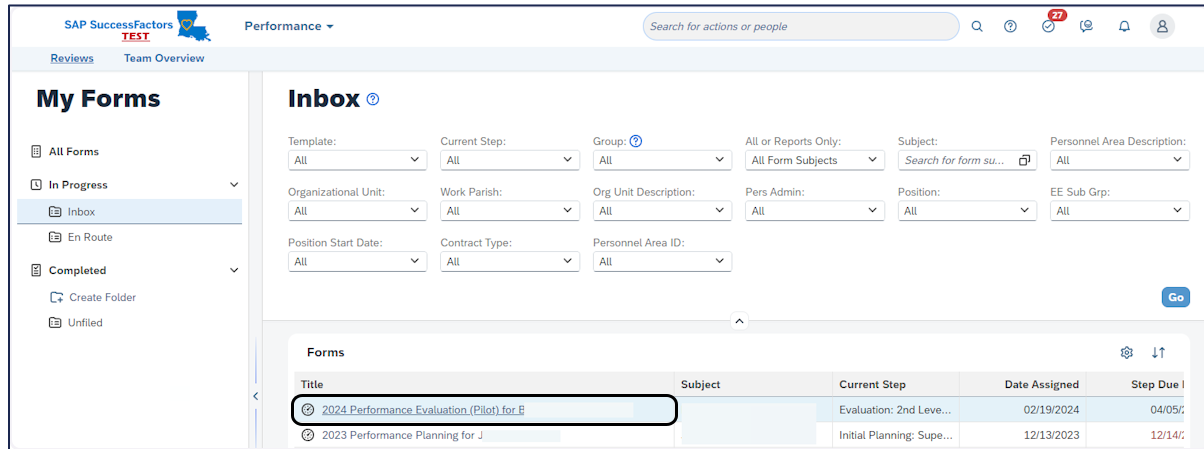
1. The 2nd Level Evaluator will ensure that your rating is appropriate for your employee's performance and that you have supporting documentation for your rating.
2. The 2nd Level Evaluator will also check to see if your rating is consistent with others who have similar performance, position descriptions,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

2ND LEVEL EVALUATOR – REVIEWING AND APPROVING PERFORMANCE EVALUATION FORM

1. **Navigate to the correct Performance Evaluation Form. Navigation Option 1:** Click on "Performance" in the Home menu. **This will take you to your "In Progress – Inbox."** **Navigation Option 2:** Click on the correct tile in the "For You Today" section. **This will open the form directly.**



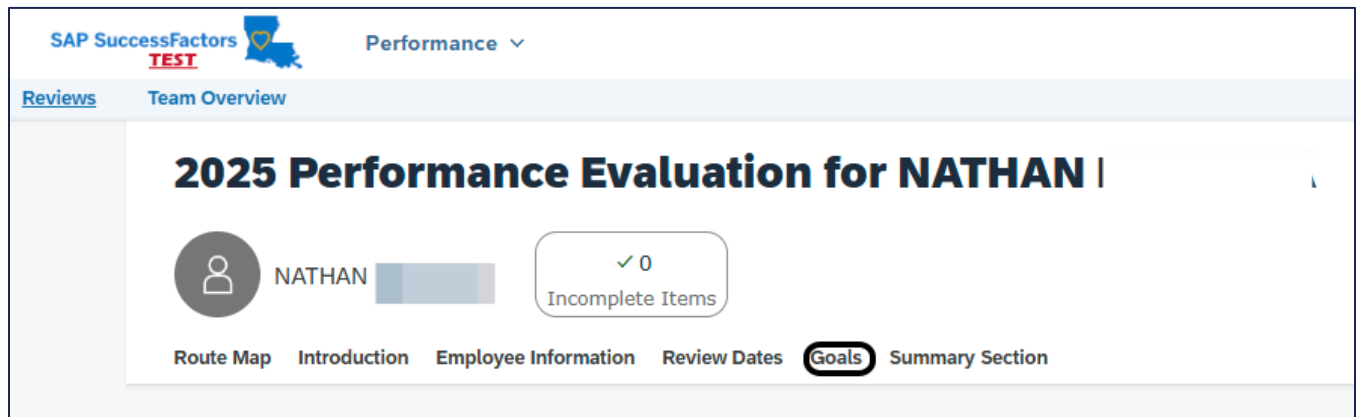
2. Click the correct form in your "In Progress - Inbox."



The screenshot shows the SAP SuccessFactors Performance Inbox. On the left, a sidebar titled "My Forms" lists categories: All Forms, In Progress (selected), En Route, Completed, Create Folder, and Unfiled. The main area is titled "Inbox" and contains a search bar and a grid of filter dropdowns for Template, Current Step, Group, All or Reports Only, Subject, Personnel Area Description, Organizational Unit, Work Parish, Org Unit Description, Pers Admin, Position, EE Sub Grp, Position Start Date, Contract Type, and Personnel Area ID. Below the filters is a "Forms" table with columns: Title, Subject, Current Step, Date Assigned, and Step Due. The first row is highlighted with a red border and contains the text "2024 Performance Evaluation (Pilot) for NATHAN".

Title	Subject	Current Step	Date Assigned	Step Due
2024 Performance Evaluation (Pilot) for NATHAN		Evaluation: 2nd Leve...	02/19/2024	04/05/2024
2023 Performance Planning for J...		Initial Planning: Supe...	12/13/2023	12/14/2023

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



The screenshot shows the "2025 Performance Evaluation for NATHAN" form. The header includes the SAP SuccessFactors logo, the word "TEST", and the "Performance" dropdown. Below the header are tabs for "Reviews" and "Team Overview". The main content area displays the employee's name "NATHAN" with a profile picture, a progress bar, and a "0 Incomplete Items" indicator. At the bottom, a navigation bar contains links for "Route Map", "Introduction", "Employee Information", "Review Dates", "Goals" (highlighted with a red border), and "Summary Section".

4. Review the rating and comments for each goal.



The screenshot shows the "Goals (100.0%)" section of the performance evaluation form. It displays a goal titled "Performance" with the description "Create 5 elearning classes with minimal assistance by December 31, 2025". Below the goal description, it shows "40.0% of total score" and "Number of classes created per development schedule." A section titled "Ratings from Others (1)" shows a "Supervisor Rating (Manager)" of 3.0, represented by five orange circles. The rating is accompanied by a comment: "He successfully completed 5 classes within the development schedule, meeting the expectations set for this goal. His work reflected consistency and reliability in producing quality courses on time, which supported the overall development process. While he met the required standard, additional initiative in creating efficiencies or Show More". A large yellow star icon is positioned in the top right corner of the page.


5. Scroll down to review the "Overall Comments on Goal Achievement."

You may need to click "Section Comments from Others" and/or Show More" to view the comments in their entirety.



Overall Comments on Goal Achievement


▼ Section Comments from Others (1) ←

 **LACI** (Manager)
Overall, he consistently met or exceeded expectations across his goals, delivering high-quality work on schedule and often ahead of deadlines. He demonstrated initiative by taking on additional projects, supporting colleagues, and volunteering for committees, all while maintaining strong performance in his primary responsibilities. His
[Show More](#) ←

6. In the Summary section, you can view the "Overall Form Rating" and the "Adjusted Calculated Form Rating," as well as the ratings for each goal.

NOTE: You cannot change the "Adjusted Calculated Form Rating." The system automatically calculates the employee's overall score based on the ratings assigned by the supervisor. Also, the "Overall Form Rating" and the "Adjusted Calculated Form Rating" are the same per system settings.

Summary Section

Overall Form Rating: 
4.0 - Exceeds Expectations

Adjusted Calculated Form Rating:
4.0 - Exceeds Expectations


Name	Rating	Weight
Goals		100.0% of total score
Create 5 elearning classes with minimal assistance by December 31, 2025	3.0 - Successful	40.0%
Assist with the creation of the learning aids and courses for CPM as instructed by October 1, 2025.	5.0 - Exceptional	20.0%
Assist with evolving department needs by effectively managing additional tasks and responsibilities.	4.0 - Exceeds Expectations	20.0%
Complete the SCS CPTP Leadership Academy by November 1, 2025.	3.0 - Successful	10.0%
Improve time management skills by submitting all courses by the assigned deadline.	5.0 - Exceptional	10.0%

7. Scroll down to review the "Overall Comments on Performance."


You may need to click "Section Comments from Others" and/or "Show More" to view the comments in their entirety.



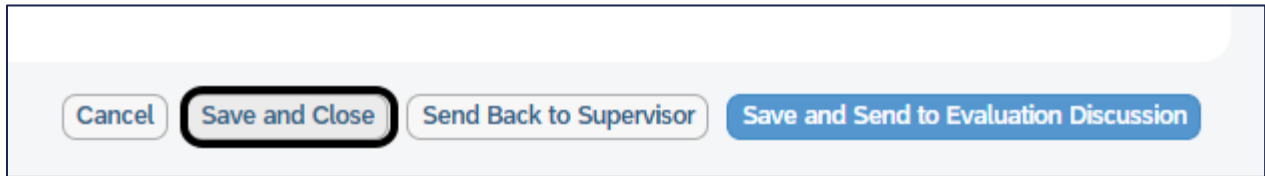
Overall Comments on Performance

Comments by GLYN 
Comments not provided

▼ Section Comments from Others (1) ←

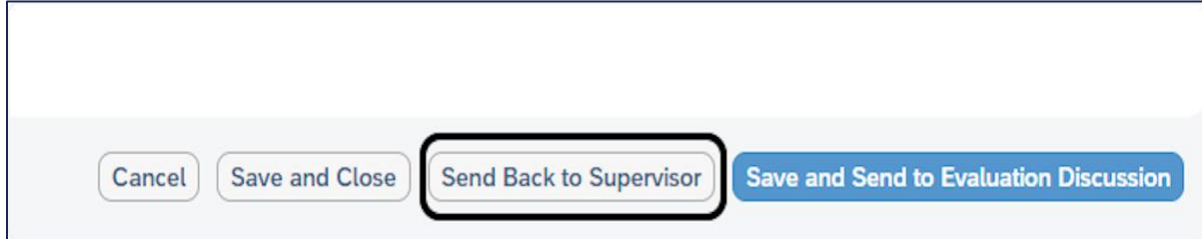
 **LACI** (Manager)
Overall, he has demonstrated strong professional behaviors that have had a positive impact on both his team and the organization. He consistently shows initiative by seeking opportunities to contribute beyond his assigned responsibilities and approaches his work with reliability, accountability, and a solutions-oriented mindset. His
[Show More](#) ←

8. If you are not ready to send the form, you may click "Save and Close."



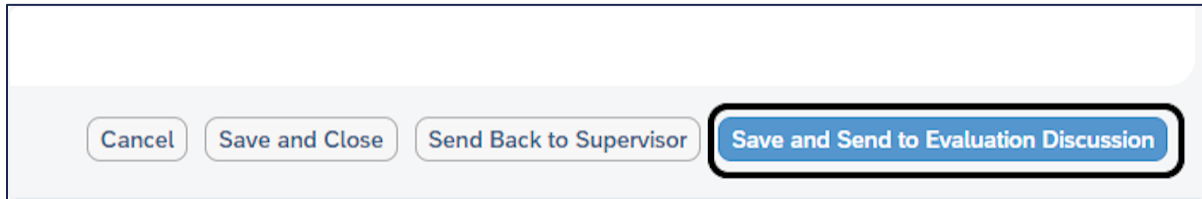
9. If you do not approve the evaluation, click "Send Back to Supervisor."

NOTE: You will need to contact the supervisor to discuss why you are returning the form.



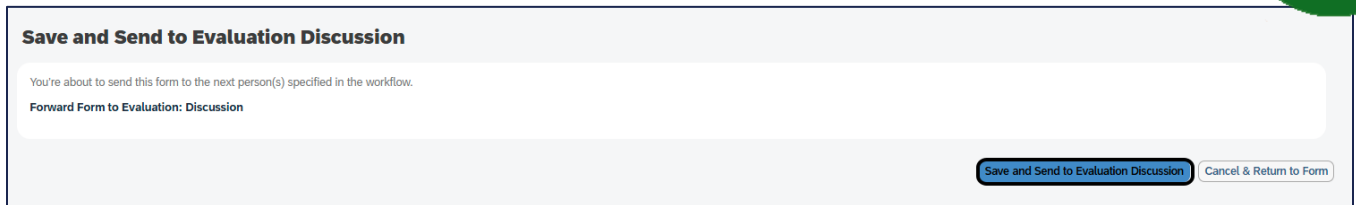
10. To approve the evaluation, click "Save and Send to Evaluation Discussion."

NOTE: This is required to move the form to the next stage in the Route Map.



11. A confirmation window will open. Click "Save and Send to Evaluation Discussion." The form will be sent to both the supervisor and the employee simultaneously.

NOTE: This is required to move the form to the next stage in the Route Map.



MEETING WITH YOUR 2ND LEVEL EVALUATOR

Your 2nd Level Evaluator may want to meet with you to discuss the ratings given to your employees.

Here are some guidelines to help you prepare for the meeting:

- Follow your agency policies. Some agencies may require you to submit your CPM forms and documentation to your 2nd Level Evaluator before your meeting. Other agencies will ask you to bring the forms and documentation with you to your meeting. Check with your supervisor or HR Office if you are unsure of your agency policies.
 - Prepare materials. Make sure you bring with you the completed CPM form, the position description, and any supporting documentation to the meeting with your 2nd Level Evaluator.
 - Summarize your rating. Be ready to give a short summary of your rating decision including the actual rating and why you chose it. Your 2nd Level Evaluator most likely must meet with several supervisors about CPM ratings and will appreciate your preparedness.
 - Be ready to answer questions. Your 2nd Level Evaluator may ask about other employees with the same or similar job duties and how you rated them.
-

CONDUCTING THE EVALUATION DISCUSSION

WHAT: Conducting a Performance Evaluation Discussion can be a valuable experience for both you and your employees, regardless of the rating.



WHEN: Once your 2nd Level Evaluator has approved the form, schedule a meeting with your employee to conduct the evaluation discussion. It is required to hold an evaluation discussion with each employee no later than March 1st of any performance year.

WHY: The performance evaluation is a chance for employees to understand how their performance was measured and learn what they must do to improve. This type of evaluation discussion can be an important opportunity for you to work with your employees and assist them to become successful in their jobs.

SUPERVISOR EVALUATION DISCUSSION CHECKLIST

BEFORE THE DISCUSSION

1. **Schedule promptly.** Schedule your evaluation discussion before you send the form to the 2nd Level Evaluator. Remember, your employees received the approved Performance Evaluation Form at the same time you did. Do not make them wait for the opportunity to discuss the ratings.
2. **Choose a private setting.** These conversations are confidential—use a private office or a reserved meeting room where others cannot overhear.
3. **Review the evaluation form.** Revisit the goals and ratings to refresh both your memory and the employee's on the standards they were expected to meet.
4. **Review the overall rating.** You may need to explain how the overall rating is calculated by the system and is based on weighted goals. Since each goal is weighted differently, the goals with a higher weight impact the overall score more than lower weighted scores.



DURING THE DISCUSSION

1. **Create a respectful tone.** Begin by acknowledging contributions and setting a professional, constructive environment.
2. **Explain ratings clearly.** Walk through each goal and the overall rating, making sure the employee understands how the score was determined.
3. **Address areas for improvement.** If there is an area of performance employees needs to improve, be sure to set clear expectations on how employees can become successful. Consider developing an action plan together.
4. **Highlight positives.** Regardless of the rating, point out at least one area of strength. Balancing feedback helps maintain engagement and motivation.
5. **Document the discussion.** Complete the "Evaluation Discussion" section of the form.
6. **Confirm next steps.** Review your expectations and the process for the employee signing the form.

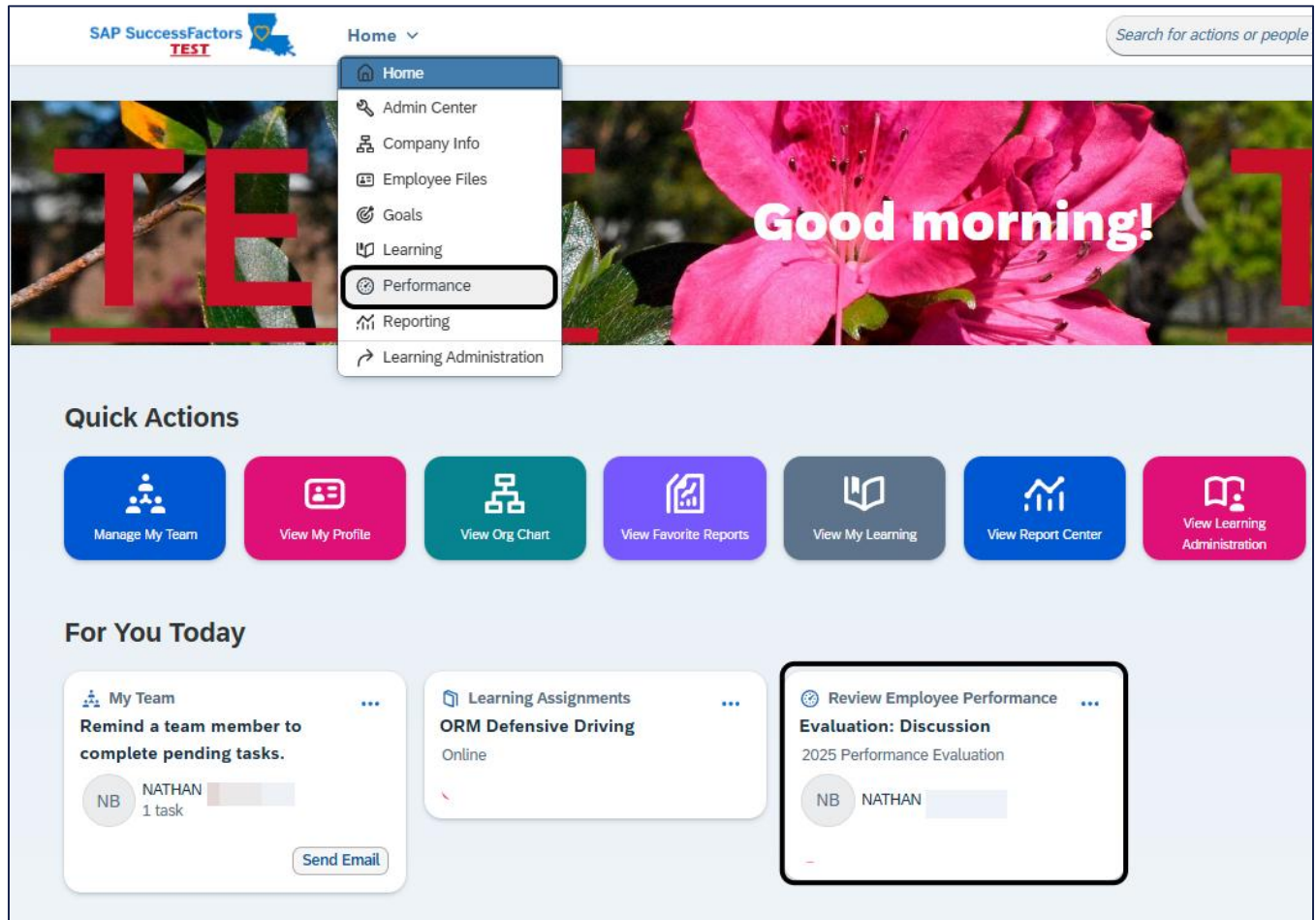
AFTER THE DISCUSSION

1. **Confirm employee acknowledgement.** Ensure the employee signs electronically to confirm the session occurred, even if they disagree with the rating.
2. **Provide a copy or access to the completed form.** This is required by SCS rules. You can either print the form and give them a copy or show them how to access the completed form.
3. **Reflect on your role.** Consider how your supervision supported (or could better support) the employee's performance during the year.

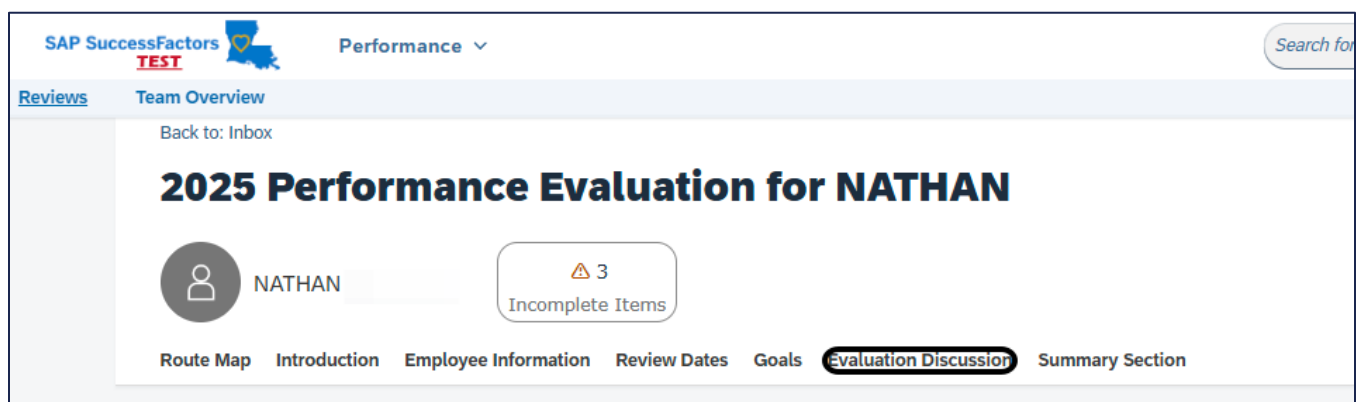
SUPERVISOR - DOCUMENTING THE EVALUATION DISCUSSION

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

1. Navigate to the employee's Performance Evaluation Form.



2. Click on “Evaluation Discussion” or scroll down to that section.



3. Complete the "Evaluation Discussion" section to complete the form.



SAP SuccessFactors **TEST** Performance ▾

Reviews Team Overview

Back to: Inbox

2025 Performance Evaluation for NATHAN

NATHAN ←

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

Evaluation Discussion

- * Date of Evaluation Discussion
- * Results of Evaluation Discussion
- * Supervisor's Signature

4. Select the date the Evaluation Discussion was conducted.



Evaluation Discussion

- * Date of Evaluation Discussion
- * Results of Evaluation Discussion
- * Supervisor's Signature

Summary Section

Overall Form Rating: 4.0 - Exceeds Expectations

< January 2026 >

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	28	29	30	31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31
6	1	2	3	4	5	6	7

5. Select the results of the Evaluation Discussion.



6. Click the "Supervisor's Signature" box. Type your name in the box.

NOTE: After you have typed your name once, it may appear under the signature box. You may click on your name to autofill the field.



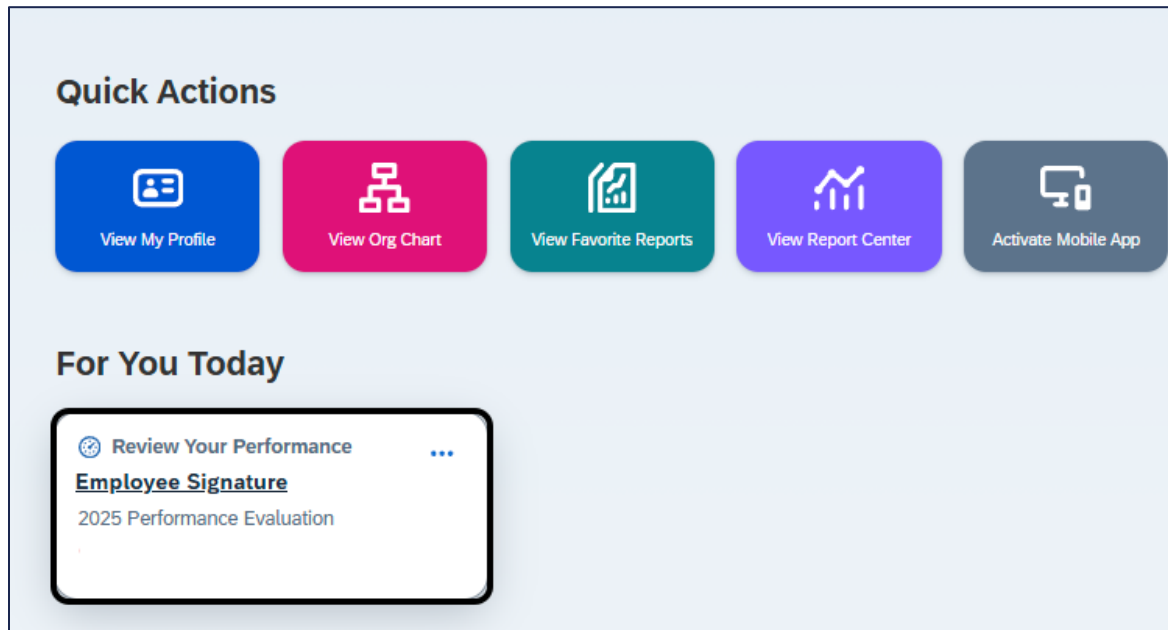
7. Scroll to the bottom of the page and click "Acknowledge Evaluation and Send to Employee."

8. A confirmation window will open. If you are finished with the form, click on "Acknowledge Evaluation and Send to Employee."

NOTE: Once the employee has signed the form, a copy of the completed form can be found in the "Completed - Unfiled" folder in "My Forms."

EMPLOYEE - DOCUMENTING THE EVALUATION DISCUSSION

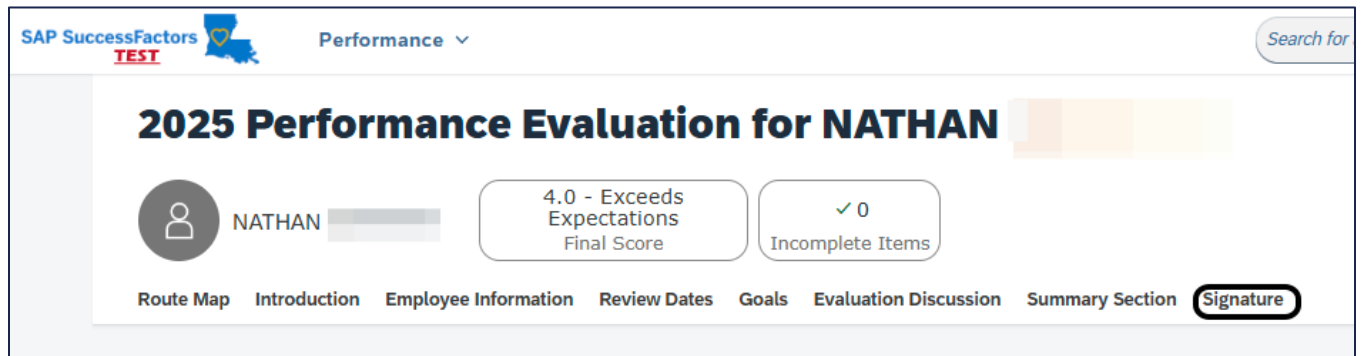
1. Navigate to your Performance Evaluation Form. Navigation Option 1: Click on "Performance" in the Home Menu. Navigation Option 2: Click on the link in the tile in the "For You Today" section.



2. Click on your "Final Score" to review the individual scores for your goals.


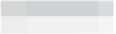


3. Scroll down or click on "Signature" to navigate to that section.



SAP SuccessFactors **TEST** Performance ▾ Search for

2025 Performance Evaluation for NATHAN

 NATHAN 

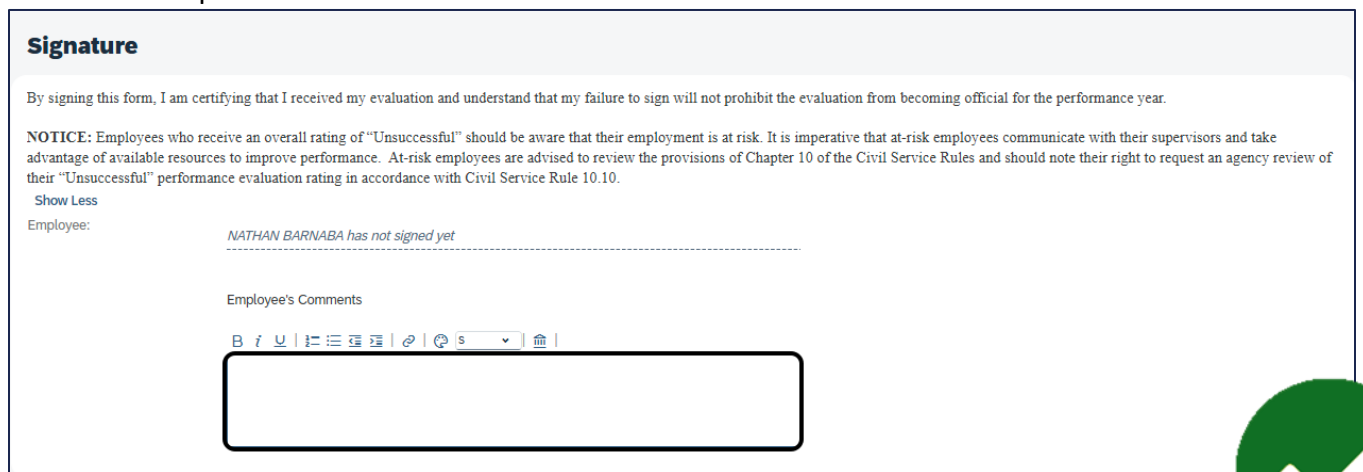
4.0 - Exceeds Expectations
Final Score

✓ 0
Incomplete Items

Route Map Introduction Employee Information Review Dates Goals Evaluation Discussion Summary Section **Signature**

4. You may type comments in the "Employee's Comments" box.

NOTE: This is optional.



Signature


By signing this form, I am certifying that I received my evaluation and understand that my failure to sign will not prohibit the evaluation from becoming official for the performance year.


NOTICE: Employees who receive an overall rating of "Unsuccessful" should be aware that their employment is at risk. It is imperative that at-risk employees communicate with their supervisors and take advantage of available resources to improve performance. At-risk employees are advised to review the provisions of Chapter 10 of the Civil Service Rules and should note their right to request an agency review of their "Unsuccessful" performance evaluation rating in accordance with Civil Service Rule 10.10.

[Show Less](#)

Employee: NATHAN BARNABA has not signed yet

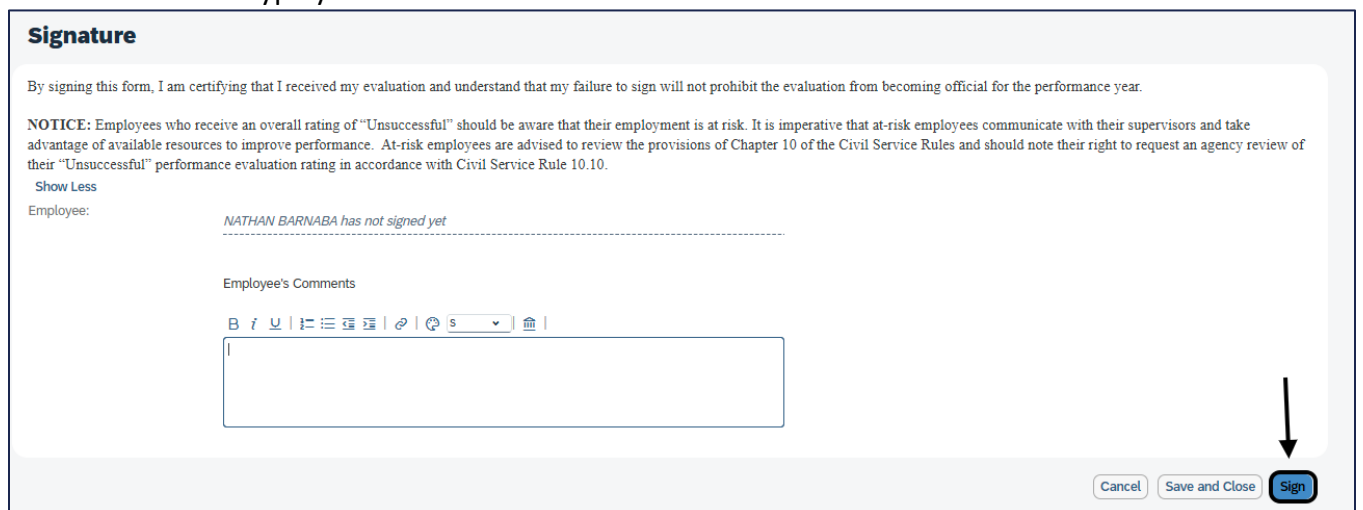
Employee's Comments





5. Click "Sign" to sign the form.

NOTE: You cannot type your name in the box.



Signature


By signing this form, I am certifying that I received my evaluation and understand that my failure to sign will not prohibit the evaluation from becoming official for the performance year.


NOTICE: Employees who receive an overall rating of "Unsuccessful" should be aware that their employment is at risk. It is imperative that at-risk employees communicate with their supervisors and take advantage of available resources to improve performance. At-risk employees are advised to review the provisions of Chapter 10 of the Civil Service Rules and should note their right to request an agency review of their "Unsuccessful" performance evaluation rating in accordance with Civil Service Rule 10.10.

[Show Less](#)

Employee: NATHAN BARNABA has not signed yet

Employee's Comments





[Cancel](#) [Save and Close](#) [Sign](#)

6. A confirmation window opens. Click on "Sign" again to complete the process.



Sign

You're about to submit this form for completion. A copy of the form will be sent to your Completed folder.

Sign Cancel & Return to Form

7. A copy of the completed form can be found in the "Completed - Unfiled" folder in "My Forms."

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

My Forms

- All Forms
- In Progress
- En Route
- Completed
- Create Folder
- Unfiled**

Unfiled

Template: All Group: All Subject: Search for form su... Personnel Area Description: All

Org Unit Description: All Pers Admin: All Position: All EE Sub Grp: All

Personnel Area ID: All

Forms

<input type="checkbox"/>	Title	Subject
<input type="checkbox"/>	2024 Performance Planning (Pilot) for	
<input type="checkbox"/>	2024 Performance Evaluation (Pilot) for	

MANAGING COMPLETED FORMS

Completed performance management forms will stay in the system for several years, as determined by your agency. You may organize your completed forms to suit your needs and preferences.

1. Click the "Performance" in the Home menu.



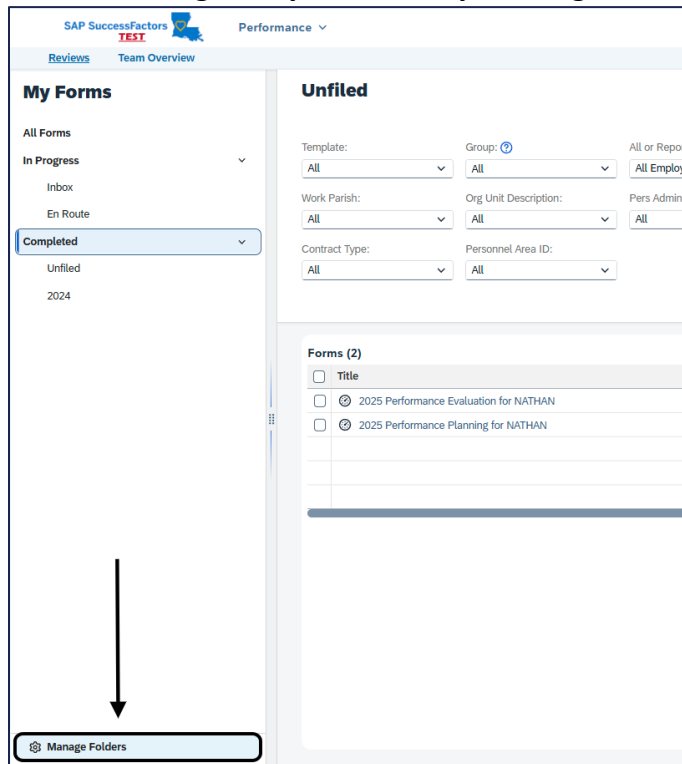
2. To find a form, click on "All Forms." Then, use the filters to help you locate the form needed.

NOTE: You can click the gear next to the drop-down menu to change the "Column Visibility Settings" and customize your inbox.

A screenshot of the SAP SuccessFactors Performance 'All Forms' page. The left sidebar shows 'My Forms' with 'All Forms' selected. The main area has a search bar and a filter section with various dropdowns. Below the filters is a table titled 'Forms (13)' showing a list of forms with columns for Title, Employee, Current Step, Currently With, Step Due Date, Form Start, and F. An arrow points to the gear icon in the top right corner of the table for column visibility settings.

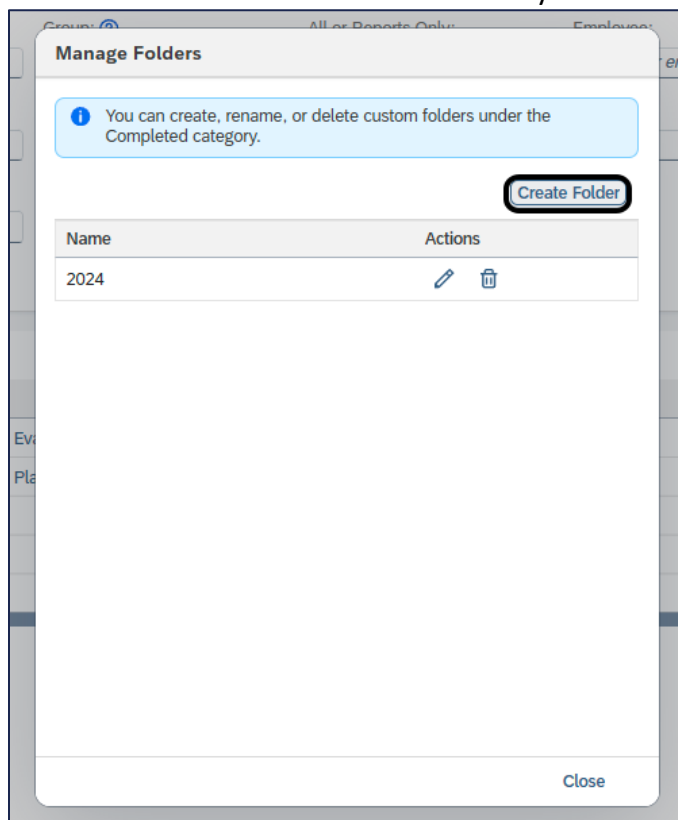
Title	Employee	Current Step	Currently With	Step Due Date	Form Start	F
2025 Alternative Performance Planning for		25	Completed	-	01/01/2025	
2025 Alternative Performance Planning for		25	Completed	-	01/01/2025	
2025 Alternative Performance Planning for		25	Completed	-	01/01/2025	

3. You can organize your forms by creating folders and moving forms. Click "Manage Folders."



4. A window opens. From here, you can create, rename, or delete custom folders under the Completed category. Click "Create Folder."

NOTE: You cannot delete a folder unless you move all of the forms in it.



5. Type in the name of the folder. Click “Save.”

NOTE: You may want to create a separate folder for each of your employees or organize by years.

The screenshot shows a 'Manage Folders' dialog box. At the top, there is a blue information box that says 'You can create, rename, or delete custom folders under the Completed category.' Below this is a 'Create Folder' section. It contains a table with two columns: 'Name' and 'Actions'. The first row shows '2024' in the 'Name' column and edit/delete icons in the 'Actions' column. The second row shows '2025 Nathan B' in the 'Name' column and the same icons. The 'Save' button is highlighted with a red circle. An arrow points to the text input field containing '2025 Nathan B'. At the bottom right of the dialog is a 'Close' button.

Name	Actions
2024	
2025 Nathan B	

6. Click “Close” when you have finished creating folders.

The screenshot shows the same 'Manage Folders' dialog box, but now the '2025 Nathan B' folder is listed in the table. The 'Save' button is no longer visible. An arrow points to the 'Close' button at the bottom right of the dialog.

Name	Actions
2024	
2025 Nathan B	

7. Click on "Unfiled" to see all forms that have not been organized.

The screenshot shows the SAP SuccessFactors Performance interface. On the left, the 'My Forms' sidebar has 'Unfiled' selected. The main area is titled 'Unfiled' and contains various filter dropdowns: Template (All), Group (All), All or Reports Only (All Employees), Employee (Search for employee), Personnel Area Description (All), Organizational Unit (All), Work Parish (All), Org Unit Description (All), Pers Admin (All), Position (All), EE Sub Grp (All), Position Start Date (All), Contract Type (All), and Personnel Area ID (All). Below the filters is a table titled 'Forms (2)' with columns: Title, Employee, Form Start, Form End Date, Form Due, Completed On, and Action. The table contains two rows: '2025 Performance Evaluation for NATHAN' and '2025 Performance Planning for NATHAN'. A red box highlights the 'Unfiled' option in the sidebar.

Title	Employee	Form Start	Form End Date	Form Due	Completed On	Action
2025 Performance Evaluation for NATHAN	[E]	01/01/2025	12/31/2025	08/29/2025	08/26/2025	[i]
2025 Performance Planning for NATHAN	[E]	06/17/2024	12/31/2025	10/23/2025	08/24/2025	[i]

8. To move a file into a folder, select the form(s).

This screenshot is similar to the previous one but shows the 'Forms (2)' table with the first checkbox selected. A red box highlights the checkbox for the '2025 Performance Planning for NATHAN' row. The sidebar remains the same with 'Unfiled' selected.

Title	Employee
<input checked="" type="checkbox"/> 2025 Performance Evaluation for [redacted]	[E]
<input type="checkbox"/> 2025 Performance Planning for [redacted]	[E]

9. Click the "Move to Folder:" drop-down menu. Select the correct folder. The selected files are moved into the selected folder.

The screenshot shows the SAP SuccessFactors Performance interface. On the left, the 'My Forms' sidebar is visible with 'Completed' selected. The main area is titled 'Unfiled' and contains various filter dropdowns. Below the filters is a table with two rows of forms. The 'Move to Folder' dropdown menu is open for the first row, showing '2024' and '2025 Nathan B' as options. The '2025 Nathan B' option is highlighted.

Forms (2)	Title	Employee	Form Start	Form End Date	Form Due	Move to Folder	Action
<input checked="" type="checkbox"/>	2025 Performance Evaluation for	[E]	01/01/2025	12/31/2025	08/29/2025	2024 2025 Nathan B	
<input checked="" type="checkbox"/>	2025 Performance Planning for	[E]	06/17/2024	12/31/2025	10/23/2025	08/24/2025	

10. Click on any folder to view its contents.

The screenshot shows the same SAP SuccessFactors Performance interface. The 'Completed' folder in the 'My Forms' sidebar is now selected, and the main area is empty, indicating that the contents of the selected folder are being displayed.