SAP SuccessFactors

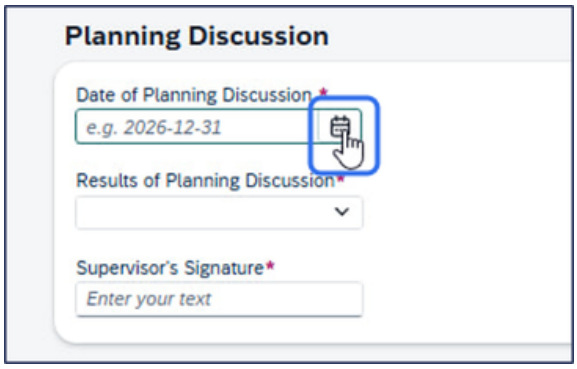
HOW TO DOCUMENT THE PLANNING DISCUSSION

1 NAVIGATE TO THE PLANNING FORM

- From the **Main Menu**, select **Performance** and, then, **Reviews**.
- From your **My Forms - Inbox**, open the correct form.
- Scroll down to the **Planning Discussion section** of the form.

2 SELECT DATE

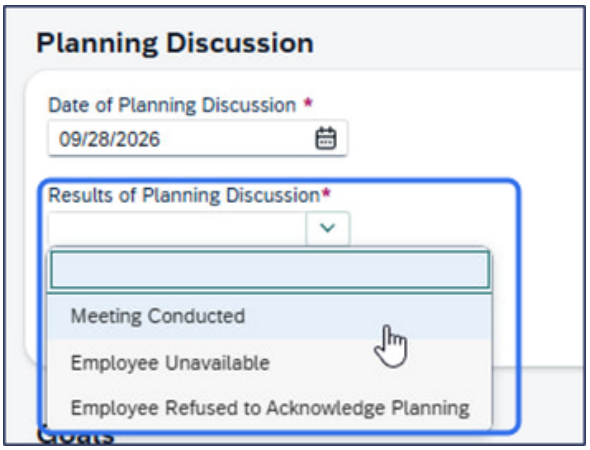
Select **Date of Planning Discussion**.

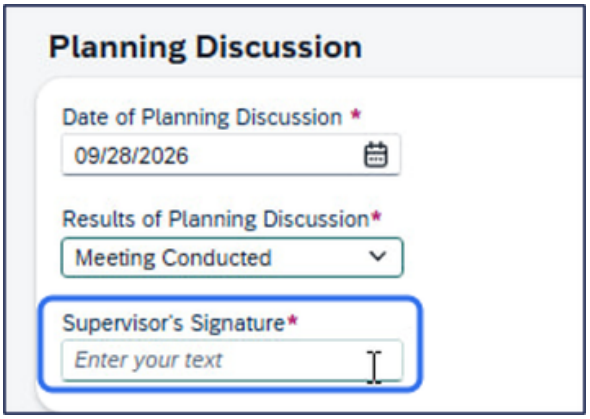


The planning discussion should be documented on the same day it is conducted. Backdating or advance dating may result in an audit finding.

3 SELECT RESULTS

- Select **Results of Planning Discussion**.
- Select **Meeting Conducted** when you have met with your employee and discussed their goals.
- If your employee is on FMLA or other extended leave, you may need to select **Employee Unavailable**. Before making this selection, please consult with your HR to ensure you are complying with State Civil Service rules.
- Use **Employee Refused to Acknowledge Planning**, when you have met with your employee and the employee says they will not sign the planning form.





4 SIGN THE FORM

Type your name in the **Supervisor's Signature** field.

5 ACKNOWLEDGE & CONFIRM

- Scroll to the bottom of the form.
- Click **Acknowledge Planning Discussion and Send to Employee**.
- A confirmation screen opens. You must select **Acknowledge Planning Discussion and Send to Employee** again for the form to move to the employee to sign.



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