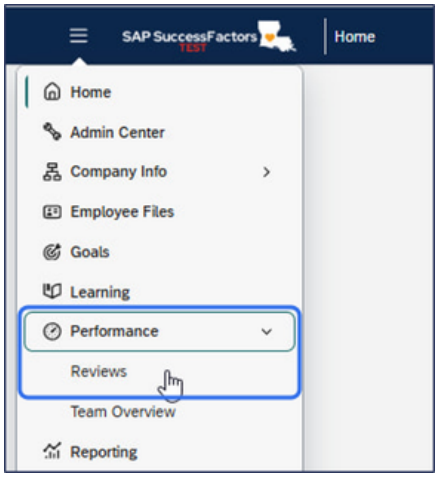
SAP SuccessFactors

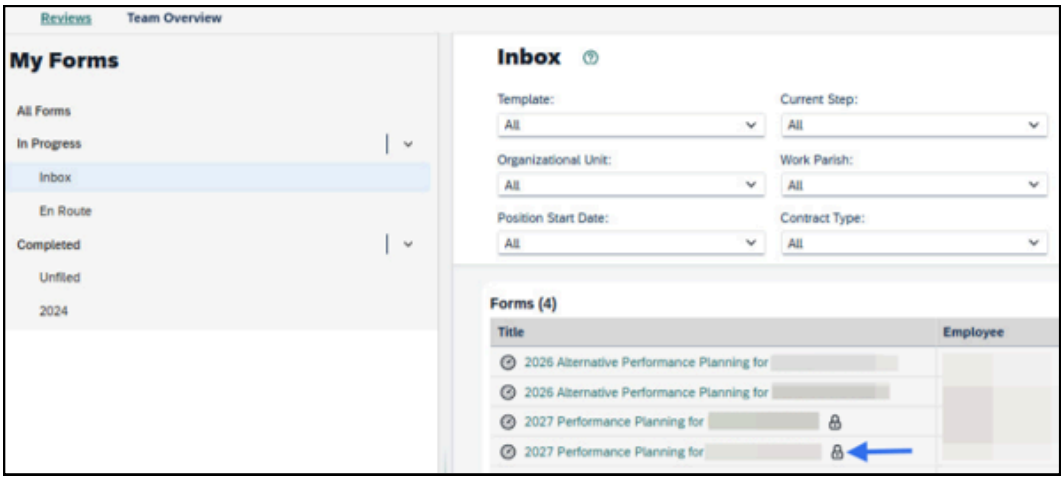
HOW TO COMPLETE A CPM PLANNING FORM

CPM Planning establishes the employee's performance expectations for the year through clearly defined goals.

1 SELECT EMPLOYEE'S FORM

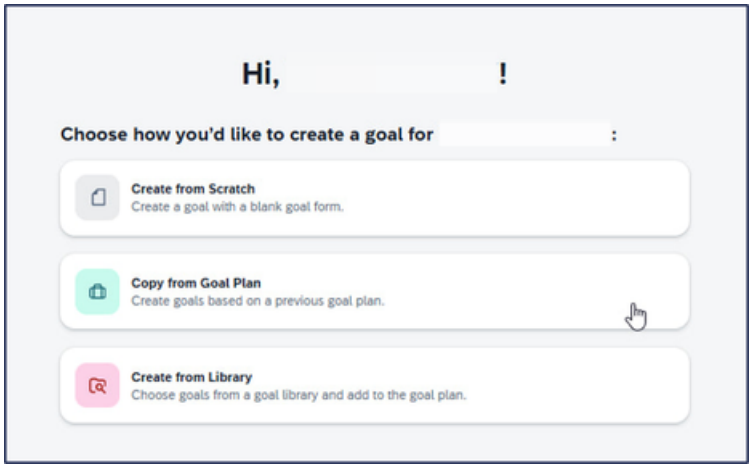
- Select **Performance** and, then, **Reviews** in the **Main Menu**.
- Select the **link** for the employee's form for whom you want to create a goal.
- The lock icon indicates the form is not yet available.

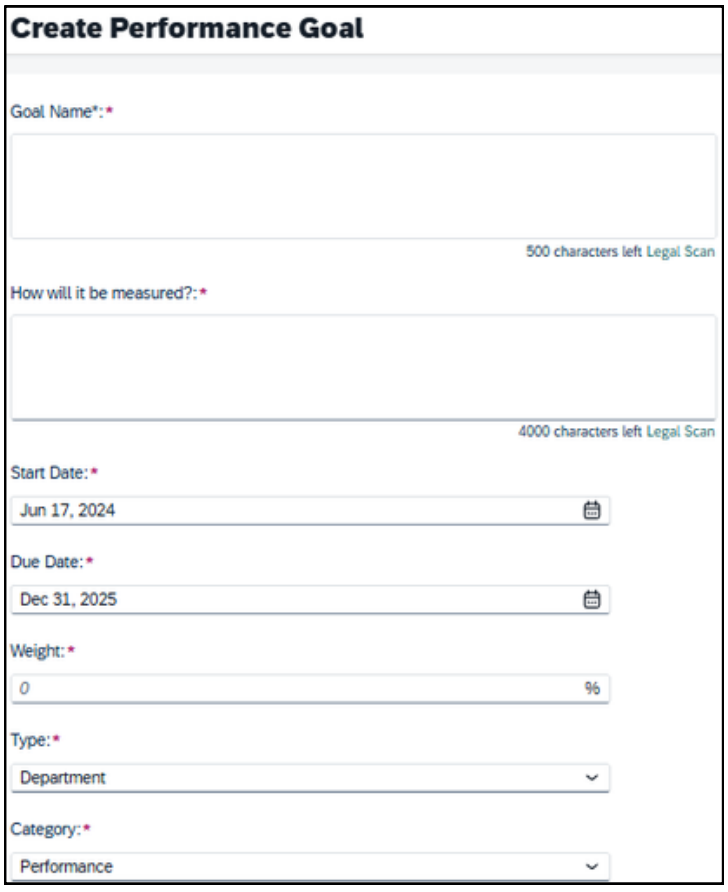




2 ADD GOALS

- Select method for creating a goal. See **Creating Goals Quick Guide** for more information.
- You must add a **minimum of 3 goals**.
- **Maximum number of goals allowed is 10**.
- You must include a metric for each goal.
- The Weight must total **100%**.





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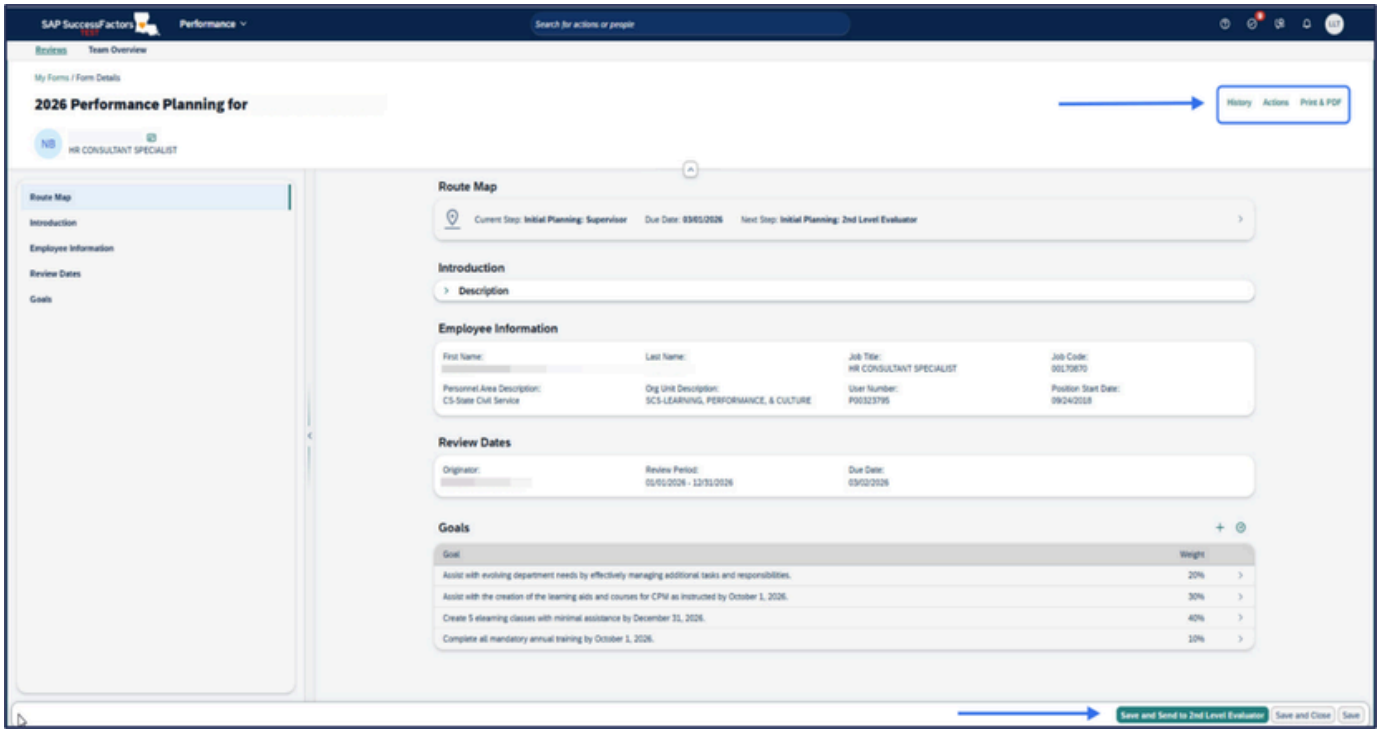
3 REVIEW THE PLANNING FORM

Under **Actions**, you have the option to **Legal Scan** the Form or **View Form Information**.

- A **Legal Scan** checks the form for any questionable or potentially inappropriate language.
- **View Form Information** provides an **Audit Trail** and **Properties** for the form.



> **!** Anytime during the form creation, you can **Save and Close** to keep your work without moving it to the next step.

4 SEND TO 2ND LEVEL EVALUATOR

- When you are finished reviewing the form, click **Save and Send to 2nd Level Evaluator**.
- A confirmation screen opens. You must select **Save and Send to 2nd Level Evaluator** again for the form to move to the next step in the Route Map.

