**Performance Management Process: Creating a Plan**

The Performance Plan allows you to set goals and clear expectations of how your employees can be successful during the upcoming year. Key information from the plan is used to create the supervisor evaluation.

1. **Locating the Plan Form:** When you log into the Performance Management system, you will see a list of action items that require your attention. When you are ready to create a plan for your direct report(s), you will see “Supervisor Creates Plan” listed under your action items. Clicking this is a direct path to creating a plan, but you may also click on “My Employees’ Reviews” on the left menu.

   Click on the blue “Supervisor Creates Plan” link to enter the plan form.

   Alternatively, if you click “My Employees’ Reviews” on the left menu, you will see a list of your employees and the performance programs which are assigned to them. Click on the respective program for each employee.

   ![Performance Management System](image)

You will now see the screen below. Clicking on the circled icon below will direct you to the employee’s Plan Form.

4. **Creating a Plan:** You are now ready to create a Plan. Navigate the form using the tabs under the blue box or by clicking “Next” at the bottom of each page.

   ![Plan Form](image)

   **Introduction:** Read through this information, then click “Next”

   **Goals:** Goals that were entered at the end of the employee’s last review will automatically populate in the Goals tab. You may edit the goals you see here, or delete goals that are no longer relevant by checking the “Remove Entry” box.

   If you would like to add any new goals, you may do so under the “Additional Goals” section.

   Only enter one goal per box. To add a second additional goal, click on the “Add Entry” button to open up a new box.

   New staff and staff who changed jobs in the last year will need new goals set for them.

   For any staff whose goals were set in their last self-evaluation or in an attachment to their last supervisor evaluation, you will need to copy-and-paste those goals into this form.

   Be sure to save your draft often. Click “Next” when you are ready to continue.

5. **Completing the Plan:** Once you are satisfied with the Plan, click the blue “Complete” button at the bottom of the screen, or select “Complete” in the blue Action drop down in the upper right corner.

   Marking the plan as complete will send it directly to the employee for review and acknowledgement. The employee will be able to comment on the Plan, and return it to you if they have any questions or suggested edits.

   You may continue to revise a plan at any time by opening the plan form and selecting “Revise” from the Actions button in the upper right corner of the form. Revising a plan will generate a new acknowledgement form for the employee.