

Stage 1: Initial Goal Planning

Initial Goal
Planning

Mid-Year
Progress
Review

Year-End
Assessment

Goal Planning Tab

The screenshot shows a navigation bar with 'About me', 'My team', and 'My community' dropdowns, a 'Journal entry' button, and a user profile for 'Emma'. Below the navigation is a breadcrumb trail: 'Start' > 'Goal Planning' > 'Mid Year' > 'Year End Assessment' > 'Next steps'. The 'Goal Planning' tab is selected and circled in red. A red callout box with an arrow pointing to the top of the content area contains the text: 'Each tab's top section has help text to guide your actions'. The content area is titled 'Goal Planning' and includes a 'Saved' status and an 'Actions' dropdown. The main content area is enclosed in a red border and contains the following text:

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

Employee's Responsibilities: Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit your goals to your manager for review and approval. Tip: Initiate a goal planning discussion with your manager.

- In this tab, you will document your SMARTER goals for the year

Adding New Goals

Item title 🗑️

Title* **← Input Goal Name here**

Description

B I U | | | | | | | | | Source

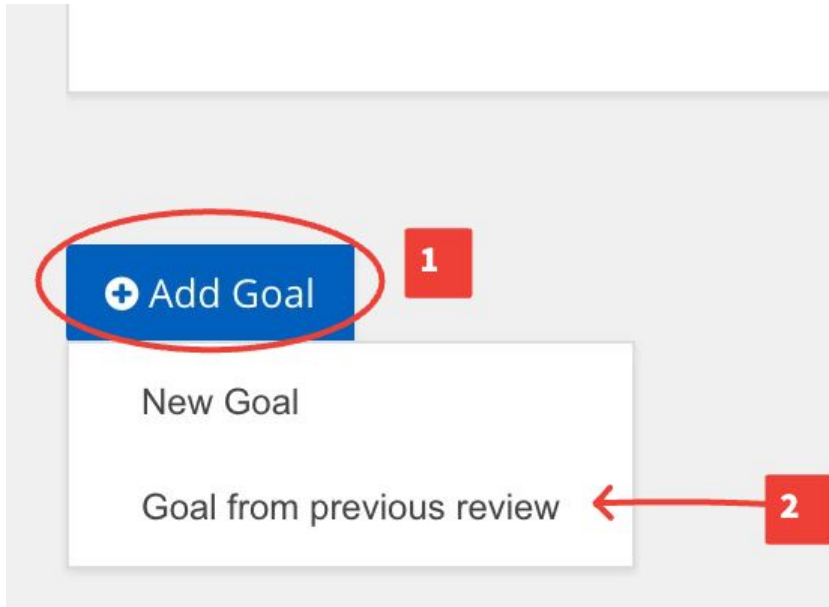
Provide a detailed description of the goal in this text box

Status **← Input other goal details here**

Target date **← Input other goal details here**

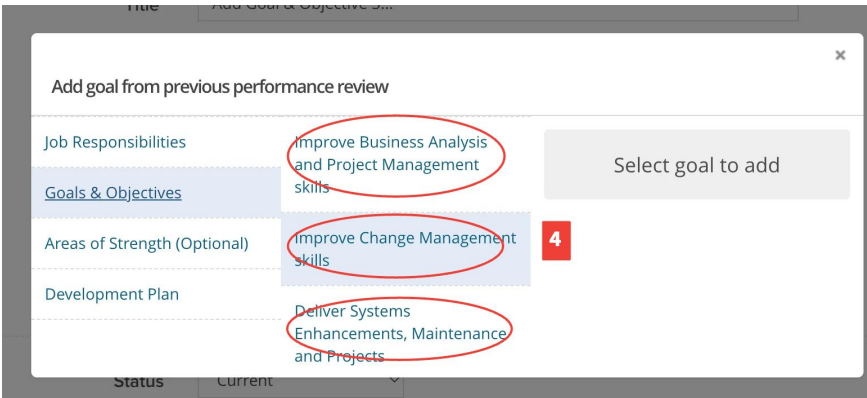
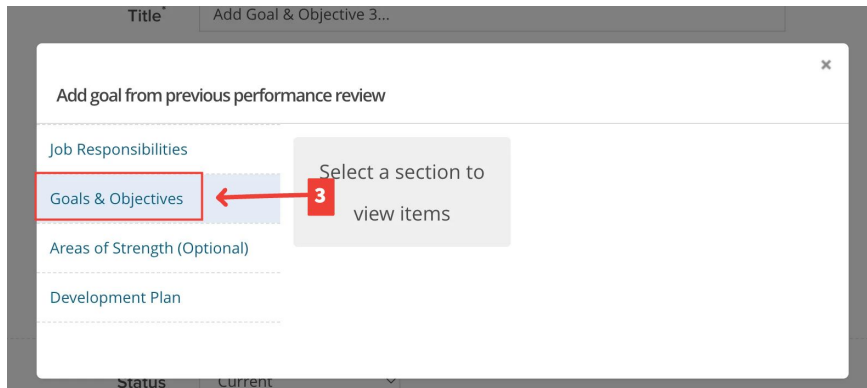
Attachment **← Input other goal details here**

Adding Goals from Previous Review



1. Click **Add Goal** (located towards the bottom of the screen)
2. Click **Goal from previous review**

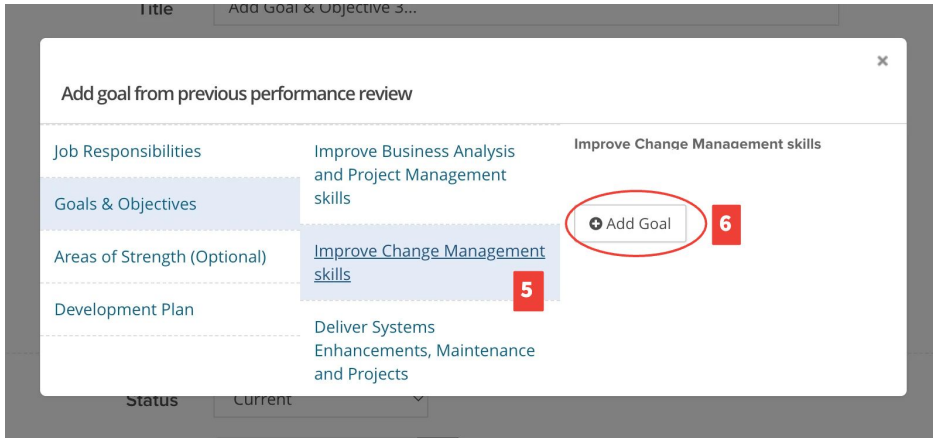
Adding Goals from Previous Review



3. Click **Goals & Objectives**

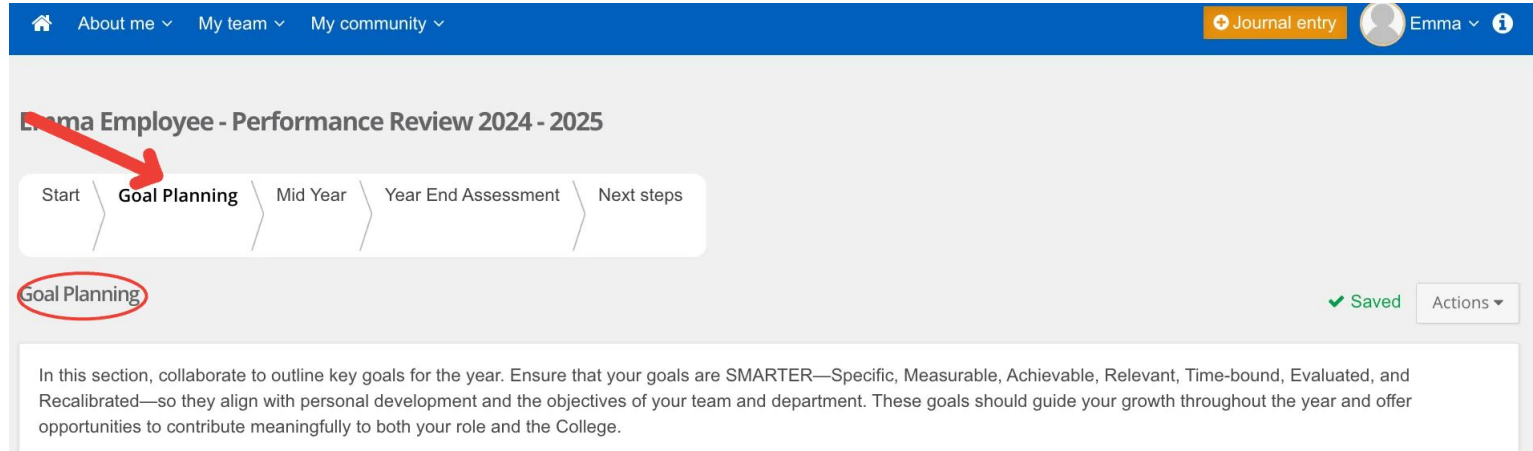
4. Review goals from your previous review

Adding Goals from Previous Review



5. Select a specific goal. It will be highlighted in blue.
6. Click **Add Goal**. It will be added to your goal listing in the Goal tab.

Moving to the Next Tab



Home About me ▾ My team ▾ My community ▾ Journal entry Emma ▾ i

Emma Employee - Performance Review 2024 - 2025

Start > **Goal Planning** > Mid Year > Year End Assessment > Next steps

Goal Planning

✓ Saved Actions ▾

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the objectives of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

- To navigate between tabs, simply push the tab name
- To help you keep track of which tab you're in, refer to the top of the section, where the tab name is also displayed

Mid Year & Year End Assessment Tabs

Although these tabs are visible, please skip them during the Initial Goal Planning stage. The items are locked, and no action is required.

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > **Mid Year** > Year End Assessment > Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 1:43pm Actions ▾

At this stage of Initial Goal Planning, please skip this tab. You will enter information in this section during the Mid-Year Progress Review.

🔒 Is your employee on track to achieve their performance goals?

← Back Next →

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > Mid Year > **Year End Assessment** > Next steps

Year End Assessment ✓ Saved Last saved: Oct 21, 2024, 1:43pm Actions ▾

At this stage of Initial Goal Planning, please skip this tab. You will enter information in this section during the Year-End Assessment.

🔒 What were your key achievements this year, and how did you accomplish them?
Description

🔒 How have you grown and developed in your role over the past year?
Description

← Back Next →

Next steps Tab

- Each stage will also include a **Next Steps** tab, where you can view a summary of your progress so far.
- You'll also see the upcoming stage name.
- You'll have the option to proceed to it if desired.

Start > Goal Planning > Mid Year > Year End Assessment > **Next steps**

Last saved: Oct 23, 2024, 1:35pm Action

Summary

Summary

▼ Goal Planning

1. final test
2. goal 1

► Mid Year

► Year End Assessment

Your next step: **Mid-Year Progress Review** Employee

This will always show the next stage you're moving to.

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

This button will progress the review to the next step

Go to next step