5 steps in the PERFORMANCE PLAN Process

1. MANAGER CREATES GOALS & JOB DUTIES
   - Manager adds goals by going to employee’s goal plan.
     - Click on “Add New” < Library Goal < choose University Goal (modify as necessary)
   - Manager adds duties by going to employee’s goal plan.
     - Click on “Add New” < Library Goal < Add Job Duty (modify as necessary)

2. MANAGER ADDS WORK ENVIRONMENT & PHYSICAL DEMANDS
   - Manager adds work environment and physical demands by clicking on task under “To Do” tile.

3. MANAGER SENDS PLAN TO EMPLOYEE
   - Once the plan is complete, manager sends plan to employee for review by clicking on “Send to Employee for Review” button at the bottom of the plan.

4. 1:1 MEETING
   - Manager and employee meet to discuss performance plan for the year.
     - Expectations should be clarified and competencies/behaviors defined.

5. MANAGER SENDS PLAN TO COMPLETION
   - Once meeting is complete, manager clicks on “Meeting Scheduled and Held with Manager and Team Member”, under “To Do” tile.
     - Click on “Send to Completion” button at the bottom of the plan.
     - (The Plan process will not be complete until this action is taken.)

For more information visit Tools & Resources or contact performancemgmt@txstate.edu