



DEVELOP INDIVIDUAL GROWTH

Performance Module

User Guide

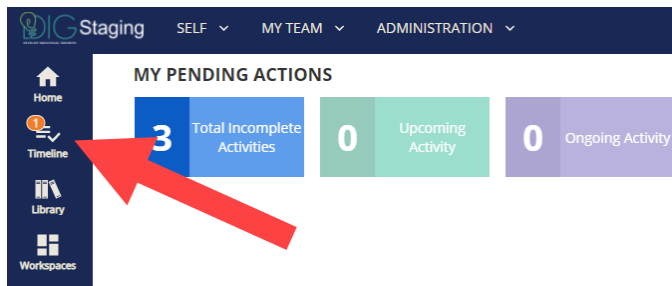
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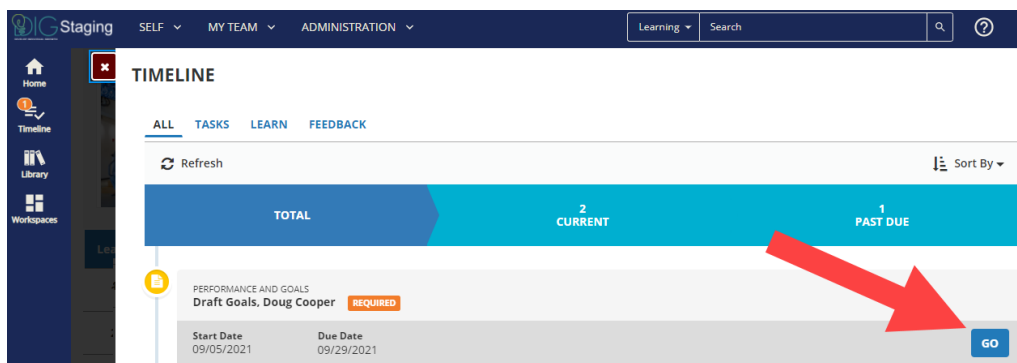
Goal Setting

At the beginning of the performance cycle, you will be prompted to begin the process by setting your annual performance goals. The following steps will guide you through creating and submitting your annual performance goals for approval.

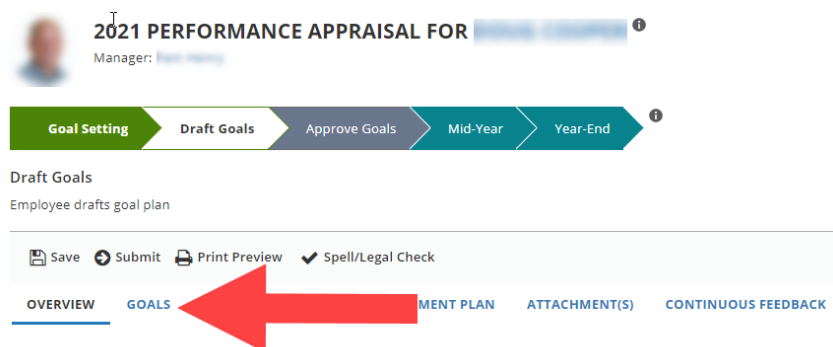
1. Click the **Timeline** icon in the Control Panel



2. Locate the **PERFORMANCE AND GOALS** entry on the timeline. Please note that a start date and date for the activity will be displayed. **Click Go.**

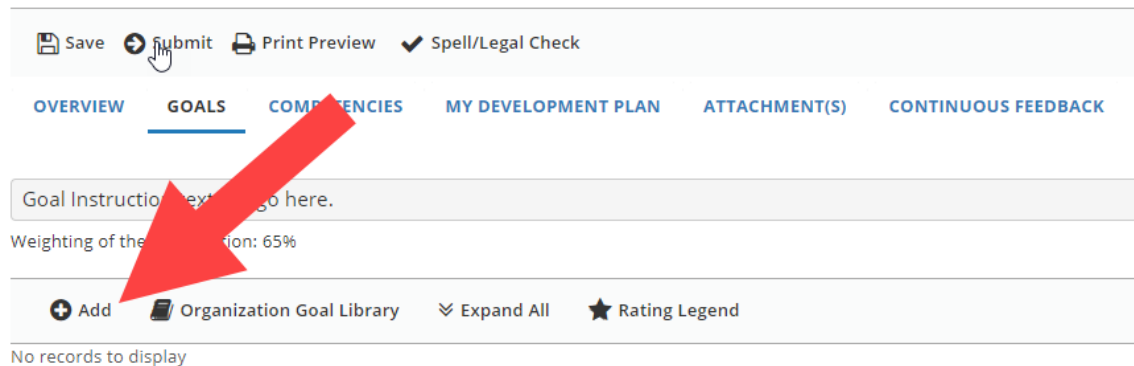


3. Click the **GOALS** tab.



Welcome to eMoney Advisor's Performance Assessment! This review is intended to give both the employee and manager a place to provide feedback. The review process is meant to be an open, two-way conversation between employee and manager. Employees should be measured on their performance and provide specific examples when completing the assessment form. Managers will review goals and development plans and submit to managers for review. 2. Managers will review goals and development plans 3. The review will track and monitor progress against goals, development plans and competencies 4. Employees and managers will be required to acknowledge the review process.

4. Click Add.



Save Submit Print Preview Spell/Legal Check

OVERVIEW **GOALS** COMPETENCIES MY DEVELOPMENT PLAN ATTACHMENT(S) CONTINUOUS FEEDBACK

Goal Instruction text goes here.

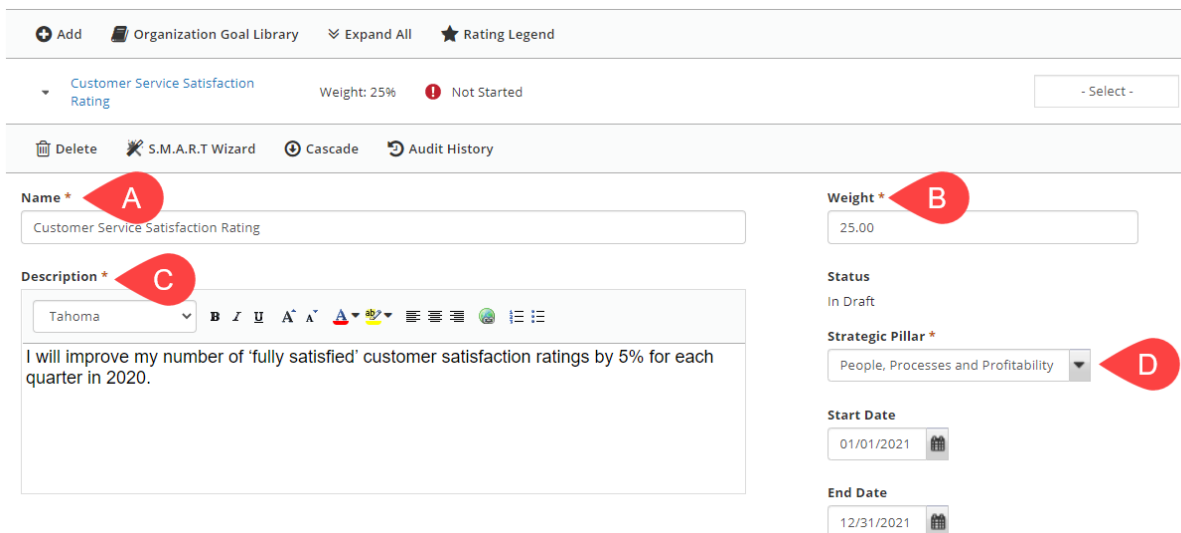
Weighting of the goal: 65%

+ Add Organization Goal Library Expand All ★ Rating Legend

No records to display

5. Enter a:

- Name**,
- Weight** (the sum of the weights across goals must equal 100),
- Description**, and
- Strategic Pillar**.
- Enter a Start Date and End Date as desired.



+ Add Organization Goal Library Expand All ★ Rating Legend

Customer Service Satisfaction Rating Weight: 25% Not Started - Select -

Delete S.M.A.R.T Wizard Cascade Audit History

Name * A Customer Service Satisfaction Rating

Weight * B 25.00

Description * C

Tahoma B I U A⁺ A⁻ [Color] [Font] [Align] [List] [Link] [Image]

I will improve my number of 'fully satisfied' customer satisfaction ratings by 5% for each quarter in 2020.

Status In Draft

Strategic Pillar * D People, Processes and Profitability

Start Date 01/01/2021 [Calendar]

End Date 12/31/2021 [Calendar]

6. Click the Goal name to collapse it.

7. Repeat Steps 4 and 5 for to enter all desired goals.

8. Click the COMPETENCIES tab

Save

Submit

Print Preview

✓ Spell/Legal Check

OVERVIEW

GOALS

COMPETENCIES

MY DEVELOPMENT PLAN

ATTACHMENT(S)

CONTINUOUS FEEDBACK

Goal Instruction text will go here.

Weighting of the Goal section: 65%

+

 Add

Organization Goal Library

⌵ Expand All

★ Rating Legend

▶ Customer Service Satisfaction Rating	Weight: 30%	! Not Started
▶ Sample Goal 2	Weight: 30%	! Not Started
▶ Sample goal 3	Weight: 20%	! Not Started
▶ Sample goal 4	Weight: 20%	! Not Started

9. Review the competencies. Competencies cannot be edited.

10. Click the MY DEVELOPMENT PLAN tab.

Draft Goals

Employee drafts goal plan

Save

Submit

Print Preview

✓ Spell/Legal Check

OVERVIEW

GOALS

COMPETENCIES

MY DEVELOPMENT PLAN

ATTACHMENT(S)

CONTINUOUS FEEDBACK

Competencies are defined as a set of individual performance behaviors which are observable, measurable and critical to success and superior performance in a job.

Please rate yourself on the following competencies:

Weighting of the Competency section: 35%

Core Competencies

▶ Expand All

★ Rating Legend

▶ Ability to Conceptualize
▶ Calculated Risk-Taking
▶ Commitment Through Action

11. Click **Edit** to add objectives and tasks to the development plan.

Save Submit Print Preview Spell/Legal Check

OVERVIEW GOALS COMPETENCIES **MY DEVELOPMENT PLAN** ATTACHMENT(S) CONTINUOUS FEEDBACK

My Development Plan instruction text will go here.

Expand All Edit

Default Objective

12. Click **Add Objective**

MY DEVELOPMENT PLAN

PROGRESS : ALL

View the progress of tasks in your Development Plan as per your selection.

OBJECTIVES

Organize your tasks within

Add Objective

TASKS: ALL

+ Add Task + Move to Objective Filter

Search for Tasks

Applied Filters: Plan Period

Note: The system will display a Default Objective that cannot be edited.

13. Enter the Objective Name, Description, Start Date, End Date and Click **SAVE**.

NEW OBJECTIVE

Objective Name *
Super Duper Certification

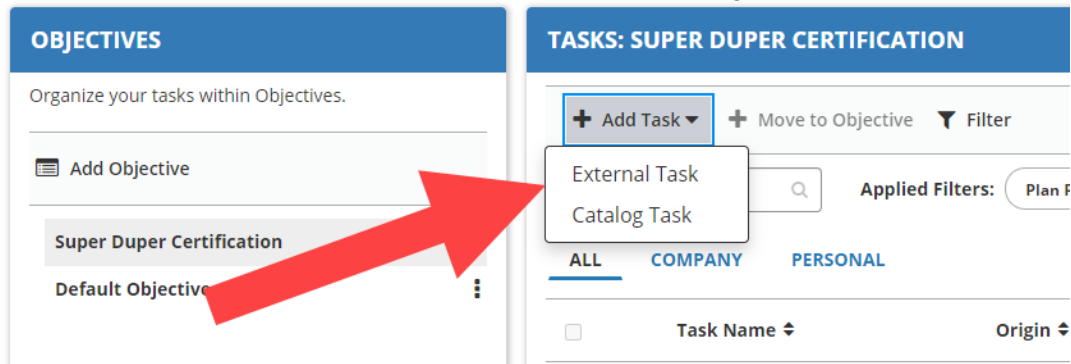
Description
I will attain a super duper certification so that I will be certifiably super duper.

Start Date
10/18/2021

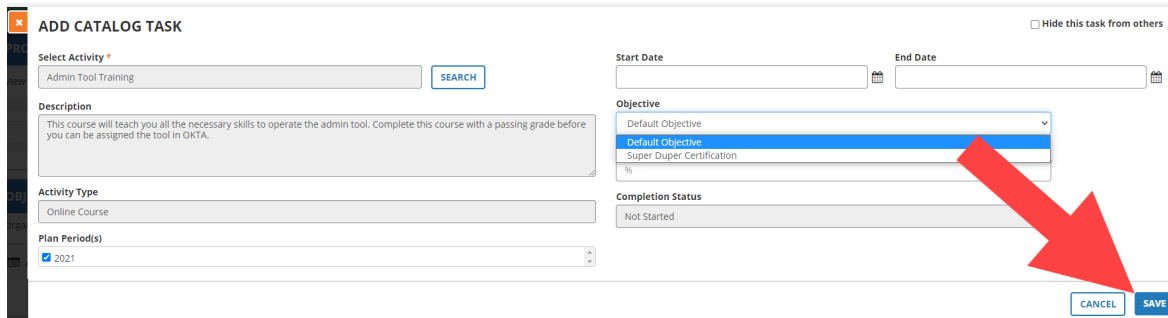
End Date
12/31/2021

CANCEL SAVE

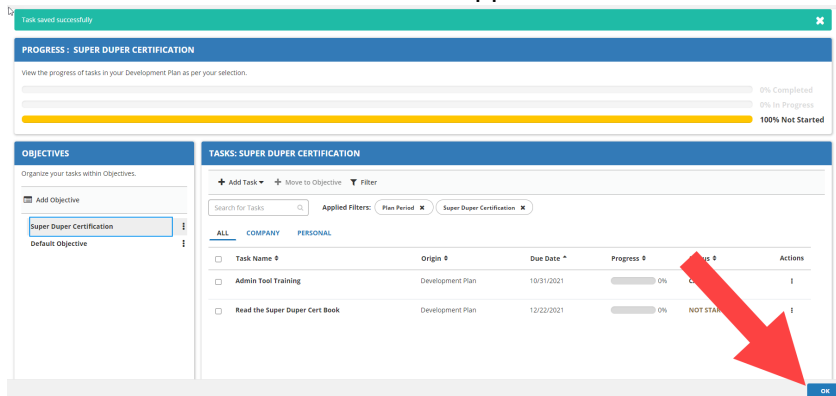
14. Click Add Task and select either External Task or Catalog Task



15. Enter the required information, select the desired Objective, and **click SAVE**.

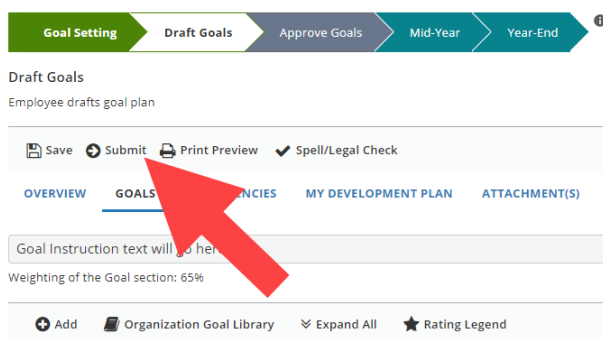


16. Click OK to return to Performance Appraisal.



Task Name	Origin	Due Date	Progress	Actions
Admin Tool Training	Development Plan	10/31/2021	0% Completed	
Read the Super Duper Cert Book	Development Plan	12/22/2021	0% Completed	

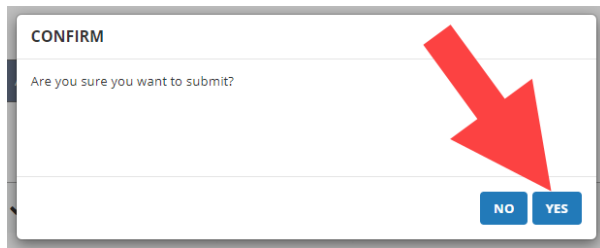
17. Click **Submit**.



Goal Instruction text will go here

Weighting of the Goal section: 65%

18. Click **YES**



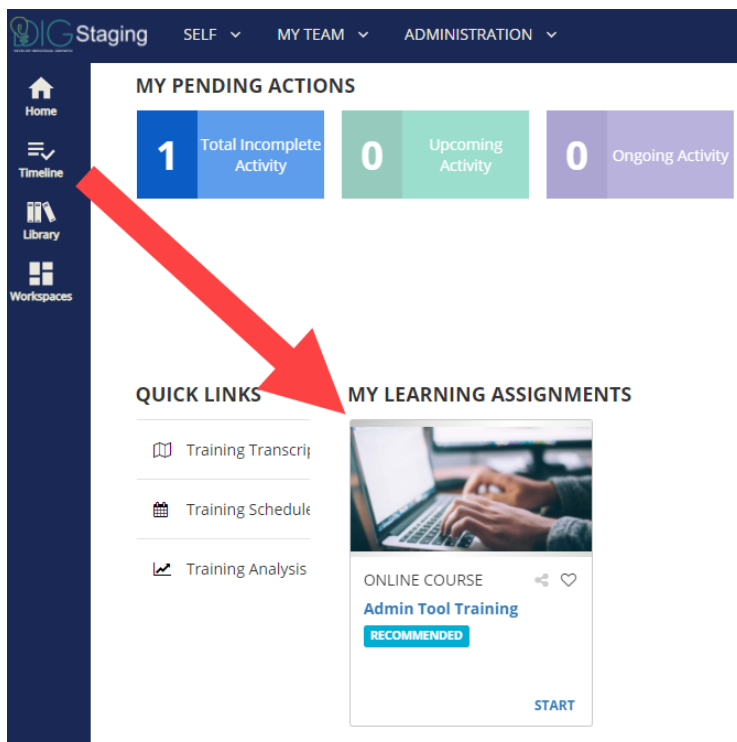
A confirmation dialog box titled "CONFIRM" with the text "Are you sure you want to submit?". At the bottom right, there are two buttons: "NO" and "YES". A large red arrow points to the "YES" button.

19. Click RETURN TO HOME



A system confirmation message with the title "SYSTEM CONFIRMATION" and the text "The information you entered was successfully submitted." Below the text is a button labeled "RETURN TO HOME". A large red arrow points to the "RETURN TO HOME" button.

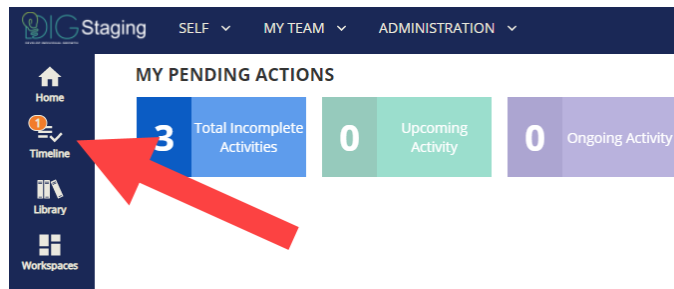
20. The Dashboard is displayed. The Performance and Goals, Draft Goals activity is removed from the timeline and any Catalog activities selected in the development plan will appear in MY LEARNING ASSIGNMENTS.



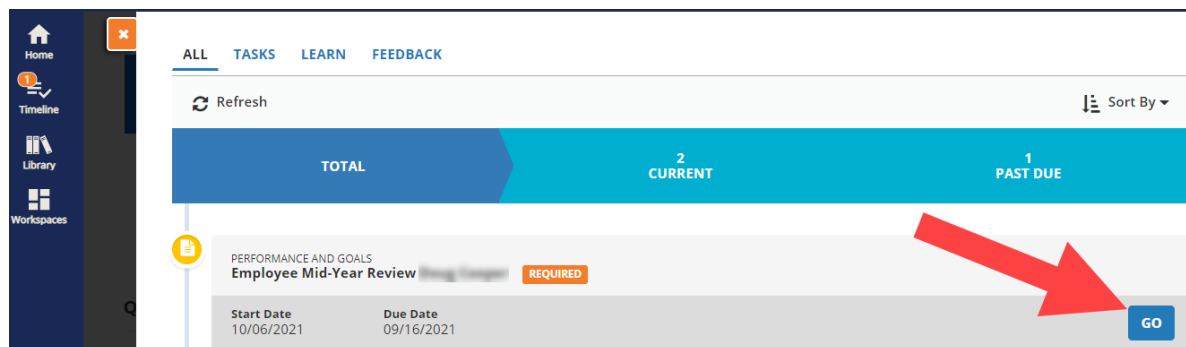
A screenshot of the dashboard interface. The top navigation bar includes "Staging" and dropdown menus for "SELF", "MY TEAM", and "ADMINISTRATION". The left sidebar contains icons for "Home", "Timeline", "Library", and "Workspaces". The main content area is divided into two sections: "MY PENDING ACTIONS" and "MY LEARNING ASSIGNMENTS". The "MY PENDING ACTIONS" section shows three cards: "1 Total Incomplete Activity", "0 Upcoming Activity", and "0 Ongoing Activity". The "MY LEARNING ASSIGNMENTS" section features a "QUICK LINKS" list with "Training Transcript", "Training Schedule", and "Training Analysis", and a card for an "ONLINE COURSE" titled "Admin Tool Training" with a "RECOMMENDED" badge and a "START" button. A large red arrow points from the "Timeline" icon in the sidebar to the "MY LEARNING ASSIGNMENTS" section.

Mid-Year Review

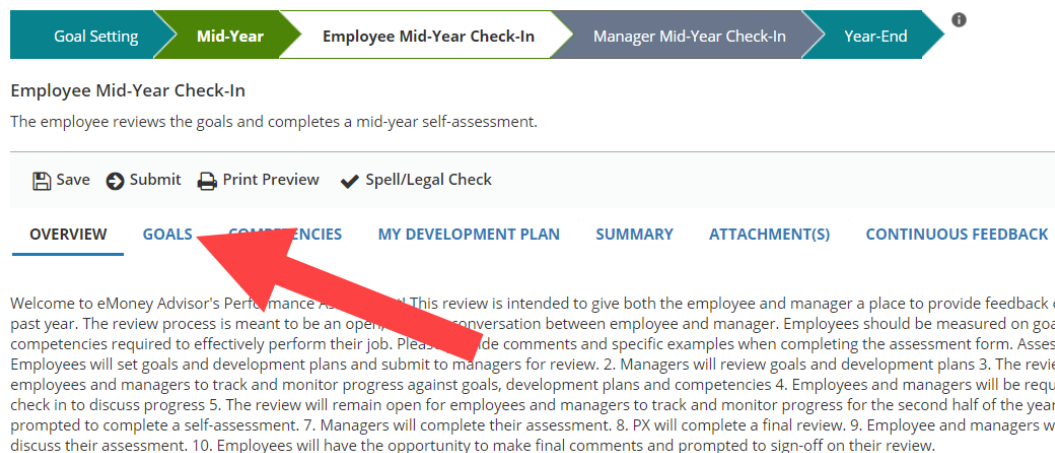
1. Click the **Timeline** icon in the Control Panel



2. Locate the Employee Mid-Year Review entry on the timeline. Please note that a start date and date for the activity will be displayed. Click **Go**.



3. Click the **Goals** tab.



4. Click on the **name** of the first goal to expand it.
 - a. There is a character limit of 255 characters for the Name field.

Goal Setting Mid-Year Employee Mid-Year Check-In Manager Mid-Year Check-In Year-End

Employee Mid-Year Check-In
The employee reviews the goals and completes a mid-year self-assessment.

Save Submit Print Preview Spell/Legal Check

OVERVIEW **GOALS** COMPETENCIES MY DEVELOPMENT PLAN SUMMARY ATTACHMENT(S) CONTINUOUS FEEDBACK

Goal Instruction text will go here.

Weighting of the Goal section: 65%

+ Add Organizational Library Expand All Rating Legend

▶ Sample Goal 1	Weight: 30%	! Not Started
▶ Sample goal 2	Weight: 20%	! Not Started
▶ Sample goal 3	Weight: 20%	! Not Started
▶ Sample Goal 4	Weight: 30%	! Not Started

5. Validate and edit the contents of the goal including the Name, Description, Weight, Strategic Pillar, Start and End Dates.

Save Submit Print Preview Spell/Legal Check

▼ Sample Goal 1 Weight: 30% ! Not Started

S.M.A.R.T Wizard Cascade Audit History

Name *

Description *

Tahoma

SMART Sample goal 2 text

Results Achieved

Tahoma

Weight *

Status
 Mid-Year Review

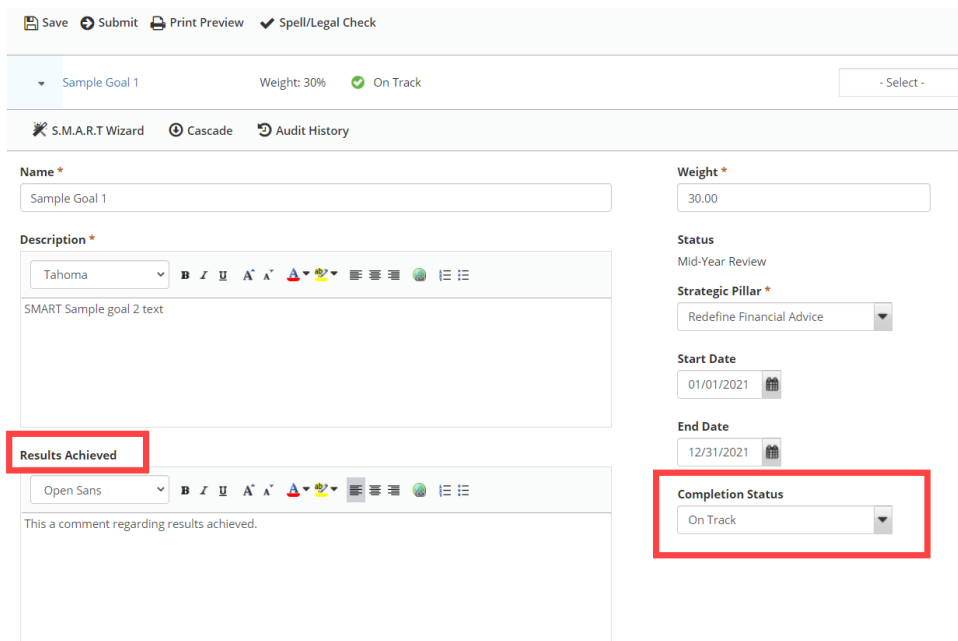
Strategic Pillar *

Start Date

End Date

Completion Status

- Enter comments under **Results Achieved** and change the **Completion Status** as desired.



Save Submit Print Preview Spell/Legal Check

Sample Goal 1 Weight: 30% On Track - Select -

S.M.A.R.T Wizard Cascade Audit History

Name *
Sample Goal 1

Weight *
30.00

Description *
Tahoma
SMART Sample goal 2 text

Status
Mid-Year Review

Strategic Pillar *
Redefine Financial Advice

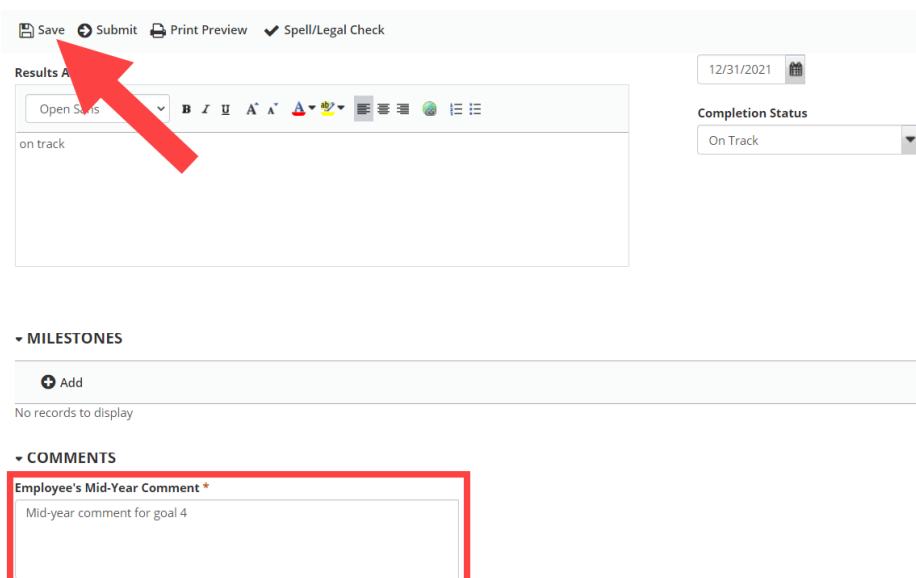
Start Date
01/01/2021

End Date
12/31/2021

Results Achieved
Open Sans
This a comment regarding results achieved.

Completion Status
On Track

- Enter **Employee Mid-Year Comments** and click <Save>. Note: Mid-Year Comments are required.



Save Submit Print Preview Spell/Legal Check

Results Achieved
Open Sans
on track

12/31/2021

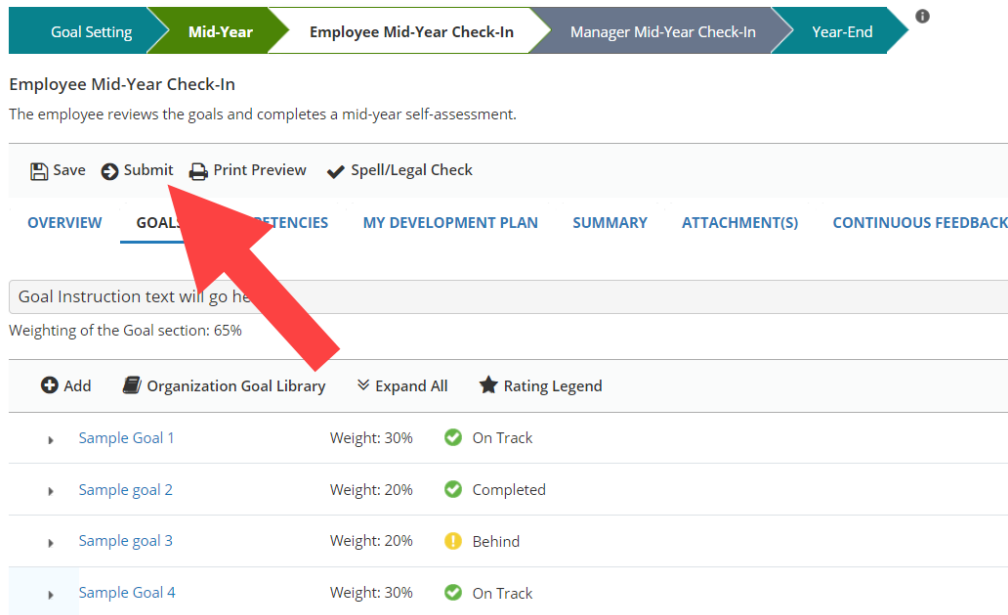
Completion Status
On Track

▼ MILESTONES
Add
No records to display

▼ COMMENTS
Employee's Mid-Year Comment *
Mid-year comment for goal 4

- Repeat Steps 4 – 6 for all other goals.
- For all other tabs will be covered during Goal Setting training. Note: Development Plans in emPerform could not be imported into DIG. You will have to recreate them in DIG. See step #10 in the [Goal Setting](#) section of this document.

10. After you have reviewed, validated, and edited your goals click **Submit**.



Goal Setting Mid-Year Employee Mid-Year Check-In Manager Mid-Year Check-In Year-End

Employee Mid-Year Check-In
The employee reviews the goals and completes a mid-year self-assessment.

Save Submit Print Preview Spell/Legal Check

OVERVIEW **GOALS** FREQUENCIES MY DEVELOPMENT PLAN SUMMARY ATTACHMENT(S) CONTINUOUS FEEDBACK

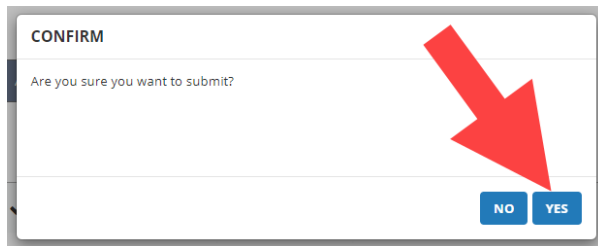
Goal Instruction text will go here

Weighting of the Goal section: 65%

+ Add Organization Goal Library Expand All Rating Legend

Sample Goal 1	Weight: 30%	On Track
Sample goal 2	Weight: 20%	Completed
Sample goal 3	Weight: 20%	Behind
Sample Goal 4	Weight: 30%	On Track

11. Click **YES**



CONFIRM

Are you sure you want to submit?

NO YES

12. Click RETURN TO HOME

SYSTEM CONFIRMATION

The information you entered was successfully submitted.



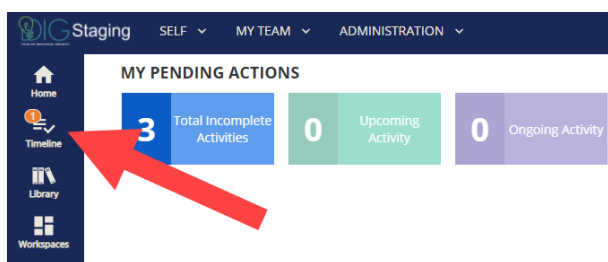
RETURN TO HOME

End of Year Review and Submission

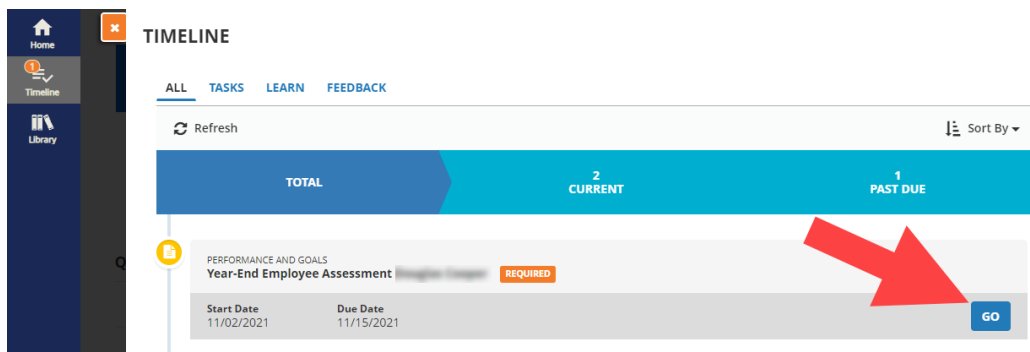
Self-Appraisal Process

When the end of year (EOY) self-appraisal timeframe is opened, you will be prompted to begin the process by setting your annual performance goals. The following steps will guide you through creating and submitting your annual performance goals for approval.

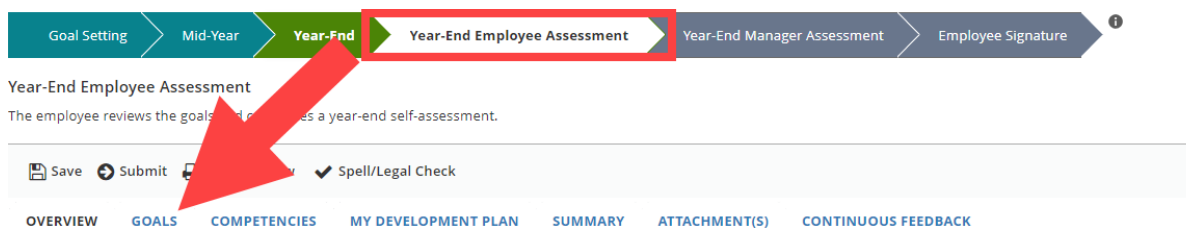
1. Click the **Timeline** icon in the Control Panel



2. Locate the Employee Mid-Year Review entry on the timeline. Please note that a start date and date for the activity will be displayed. **Click Go.**



3. Click the **Goals** tab.



Welcome to eMoney Advisor's Performance Assessment!

This review is intended to give both the employee and manager a place to provide feedback of their performance over the past year. The review process is meant to be an open, two-way conversation between employee and manager. Employees should be measured on goal achievement as well as competencies required to effectively perform their job. Please provide comments and specific examples when completing the assessment form.

- Click on the **name** of the first goal to expand it.

Goal Setting

Mid-Year

Employee Mid-Year Check-In

Manager Mid-Year Check-In

Year-End

Employee Mid-Year Check-In

The employee reviews the goals and completes a mid-year self-assessment.

Save

Submit

Print Preview

Spell/Legal Check

OVERVIEW

GOALS

COMPETENCIES

MY DEVELOPMENT PLAN

SUMMARY

ATTACHMENT(S)

CONTINUOUS FEEDBACK

Goal Instruction text will go here.

Weighting of the Goal section: 65%

Add

Organizational Library

Expand All

Rating Legend

Sample Goal 1	Weight: 30%	Not Started
Sample goal 2	Weight: 20%	Not Started
Sample goal 3	Weight: 20%	Not Started
Sample Goal 4	Weight: 30%	Not Started

- Validate the contents of the goal including the Name, Description, Weight, Strategic Pillar, Start and End Dates. Update the Completion Status as necessary.

Sample Goal 1

Weight: 30%

On Track

- Select -

S.M.A.R.T Wizard

Cascade

Audit History

Name *

Sample Goal 1

Weight *

30.00

Description *

Open Sans

B

I

U

A⁺

A⁻

ABC

ABC

ABC

ABC

ABC

ABC

ABC

ABC

SMART Sample goal 1 text

Status

Year-End Review

Strategic Pillar *

Redefine Financial Advice

Start Date

01/01/2021

Results Achieved

Tahoma

B

I

U

A⁺

A⁻

ABC

ABC

ABC

ABC

ABC

ABC

ABC

This a comment regarding results achieved.

Behind

Canceled

Completed

Not Started

On Track

status

On Track

6. Scroll down and select an **Employee Rating** (required).

▼ RATINGS

Employee Rating *

Meets Expectations
Above Expectations
Meets Expectations
Below Expectations



7. Enter **Employee's Year-End Comment** (required)

▼ COMMENTS

Employee's Mid-Year Comment

Mid-year comment

Employee's Year-End Comment *

EOY comment for Sample Goal 1.



8. Click <**Save**>

Year-End Employee Assessment

The employee reviews the goals and completes a year-end self-assessment.

Save Print Preview Spell/Legal Check

OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN

GOALS

9. Repeat Steps 4 – 8 for all other goals.

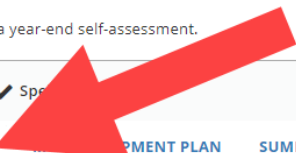
10. Click the **Competencies** tab.

Year-End Employee Assessment

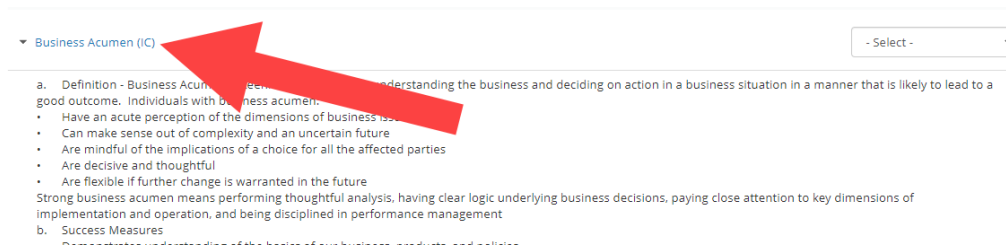
The employee reviews the goals and completes a year-end self-assessment.

Save Submit Print Preview Spell/Legal Check

OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN SUMMARY



11. Click the name of each competency to expand and review as desired.



▼ Business Acumen (IC) - Select -

a. Definition - Business Acumen is keenness and speed in understanding the business and deciding on action in a business situation in a manner that is likely to lead to a good outcome. Individuals with business acumen:

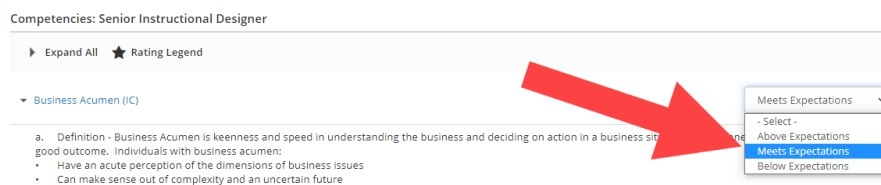
- Have an acute perception of the dimensions of business issues
- Can make sense out of complexity and an uncertain future
- Are mindful of the implications of a choice for all the affected parties
- Are decisive and thoughtful
- Are flexible if further change is warranted in the future

Strong business acumen means performing thoughtful analysis, having clear logic underlying business decisions, paying close attention to key dimensions of implementation and operation, and being disciplined in performance management

b. Success Measures

None

12. Click <Select> and enter a rating (required) for each competency. Note: If you are selecting Above Expectations, please provide a rationale in the comments.



Competencies: Senior Instructional Designer

► Expand All ★ Rating Legend

▼ Business Acumen (IC)

a. Definition - Business Acumen is keenness and speed in understanding the business and deciding on action in a business situation in a manner that is likely to lead to a good outcome. Individuals with business acumen:

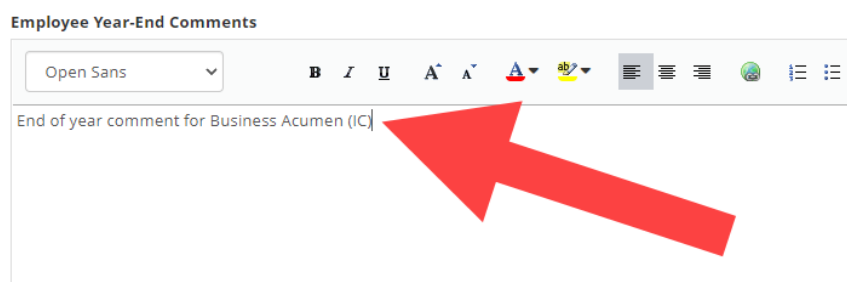
- Have an acute perception of the dimensions of business issues
- Can make sense out of complexity and an uncertain future

Meets Expectations - Select -

Meets Expectations

Below Expectations

13. Scroll down and enter **Employee Year-End Comments**.



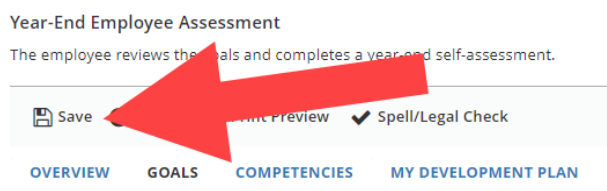
Employee Year-End Comments

Open Sans

B I U A⁺ A⁻ A⁰ ab? [List Icon] [List Icon] [List Icon] [List Icon]

End of year comment for Business Acumen (IC)

14. Click <Save>.



Year-End Employee Assessment

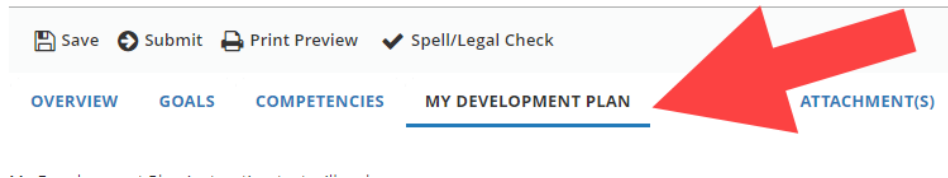
The employee reviews the goals and completes a year-end self-assessment.

Save Print Preview Spell/Legal Check

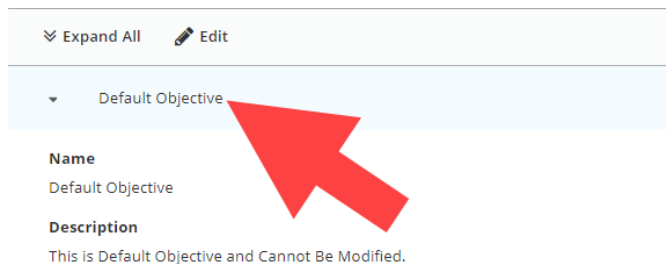
OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN

15. Repeat steps 11 – 14 for each competency.

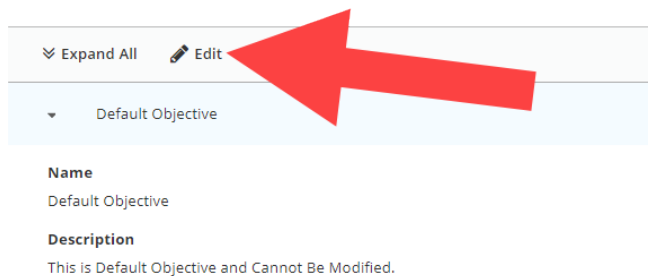
16. Click on the My Development Plan



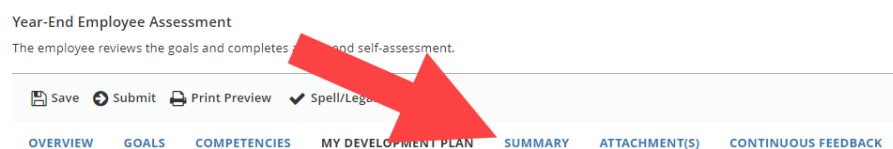
17. Click the name of each entry in your development plan to review it as desired.



18. Click <Edit> and make changes as desired.



19. Click the Summary Tab



20. Enter End of Year comments (required)

OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN **SUMMARY** ATTACHMENT(S) CONTINUOUS FEEDBACK

Summary Instruction Text will go here.
Overall Comments

Employee Mid-Year Comments

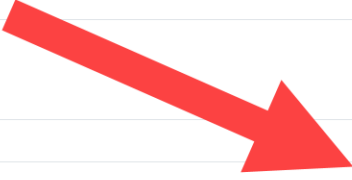
Employee Year-End Comments *



21. Scroll down and review the Overall Calculated Employee Rating for both competencies and goals.

Overall Calculated Rating

Calculated Form Ratings	Emp. Ratings
Competencies	Meets Expectations
Business Acumen (IC)	Meets Expectations
Communication (IC)	Meets Expectations
Customer Focus/Service Orientation (IC)	Meets Expectations
Leadership and Management (IC)	Meets Expectations
Goals	Meets Expectations
Sample Goal 1	Meets Expectations
Sample goal 2	Above Expectations
Sample goal 3	Meets Expectations
Sample Goal 4	Meets Expectations



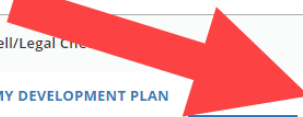
22. Click the Attachments tab.

Year-End Employee Assessment

The employee reviews the goals and completes a year-end self-assessment.

Save Submit Print Preview Spell/Legal Check

OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN **ATTACHMENT(S)**



23. Review/Delete existing attachments and/or add new attachments.

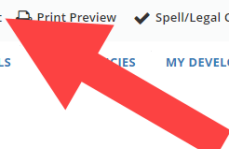
OVERVIEW		GOALS	COMPETENCIES	MY DEVELOPMENT PLAN	SUMMARY	ATTACHMENT(S)	CONTINUOUS FEEDBACK
Filename						Actions	
d_cooper Strengths Coach Certificate.pdf							
eMoney Color Palette.png							
DIG Leading With Purpose Registration Instructions.pdf							
Choose File No file chosen							

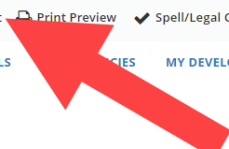
23. After you have reviewed, validated, and edited your goals click **Submit**.

Year-End Employee Assessment

The employee reviews the goals and completes a year-end self-assessment.

 Save  Submit  Print Preview  Spell/Legal Check

OVERVIEW GOALS  COMPETENCIES MY DEVELOPMENT PLAN SUMMARY ATTACHMENT(S) CONTINUOUS FEEDBACK

Filename	Actions
d_cooper Strengths Coach Certificate.pdf	

24. Click **YES**

CONFIRM

Are you sure you want to submit?



25. Click RETURN TO HOME

SYSTEM CONFIRMATION

The information you entered was successfully submitted.





Your manager is notified that your performance appraisal is ready for review. If your manager returns it to you for any reason you will see a notification in your timeline. Your managers comments will appear under “Feedback Comments” and be displayed when you click on <Go> from the alert in the timeline.

Year-End Employee Assessment

The employee reviews the goals and completes a year-end self-assessment.

A screenshot of the 'Year-End Employee Assessment' interface. At the top, there are buttons for 'Save', 'Submit', 'Print Preview', and 'Save & Submit'. Below these is a horizontal navigation bar with tabs: 'OVERVIEW', 'GOALS', 'COMPETENCIES', 'MY DEVELOPMENT PLAN', 'SUMMARY', 'ATTACHMENT(S)', and 'CONTINUOUS FEEDBACK'. The 'FEEDBACK COMMENTS' tab is highlighted with a red box. A red arrow points from this tab to the 'Feedback Comments' section below. The 'Feedback Comments' section contains a text area with the placeholder text: 'Please update your assessment for the training goal to reflect the performance training guides you created. The rating for this is meets expectations.'

Repeat the self-appraisal process outline above to make required adjustments/comments and re-submit.

End of Year Final Sign Off

Coming Soon