



DEVELOP INDIVIDUAL GROWTH

**Performance Module
User Guide**

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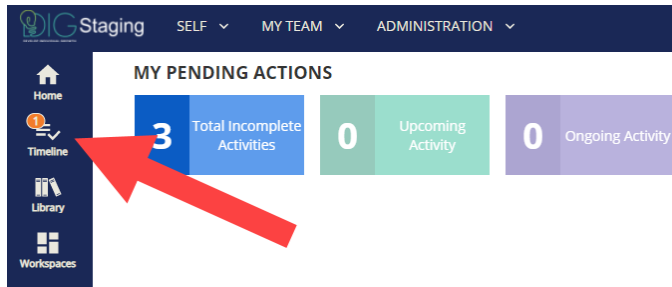
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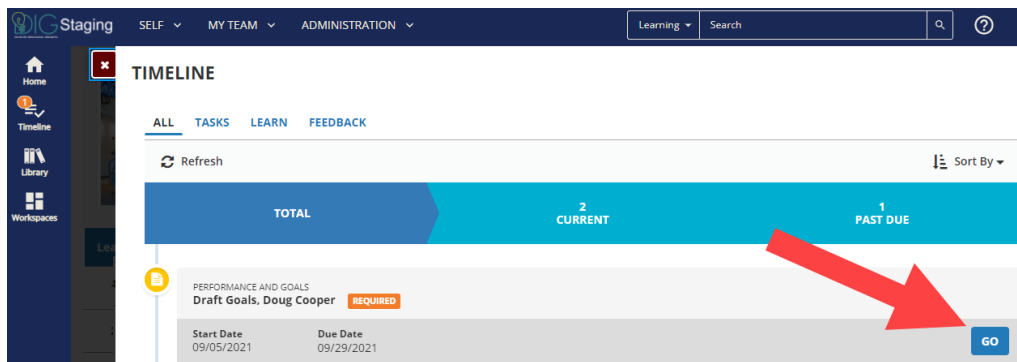
Goal Setting

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.

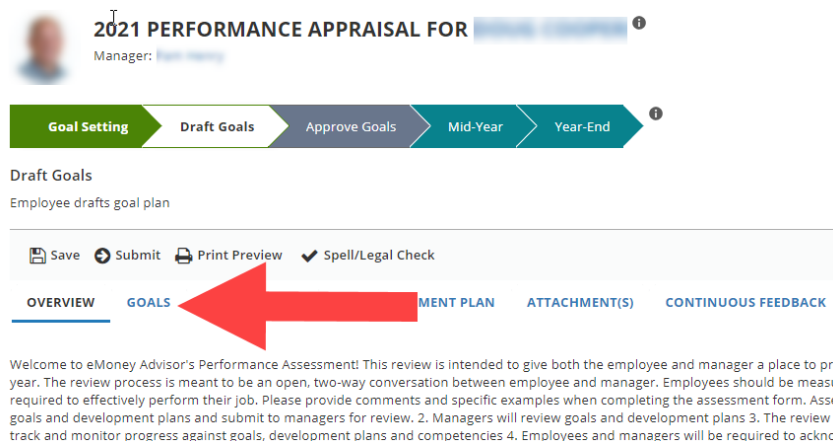
1. Click the **Timeline** icon in the Control Panel



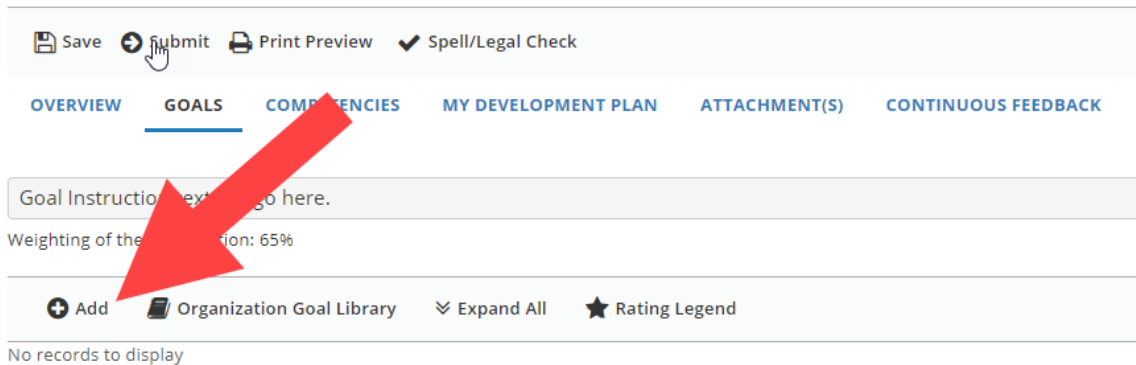
2. Locate the **PERFORMANCE AND GOALS** entry on the timeline. Please note that a start date and date for the activity will be displayed. **Click Go.**



3. Click the **GOALS** tab.



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.

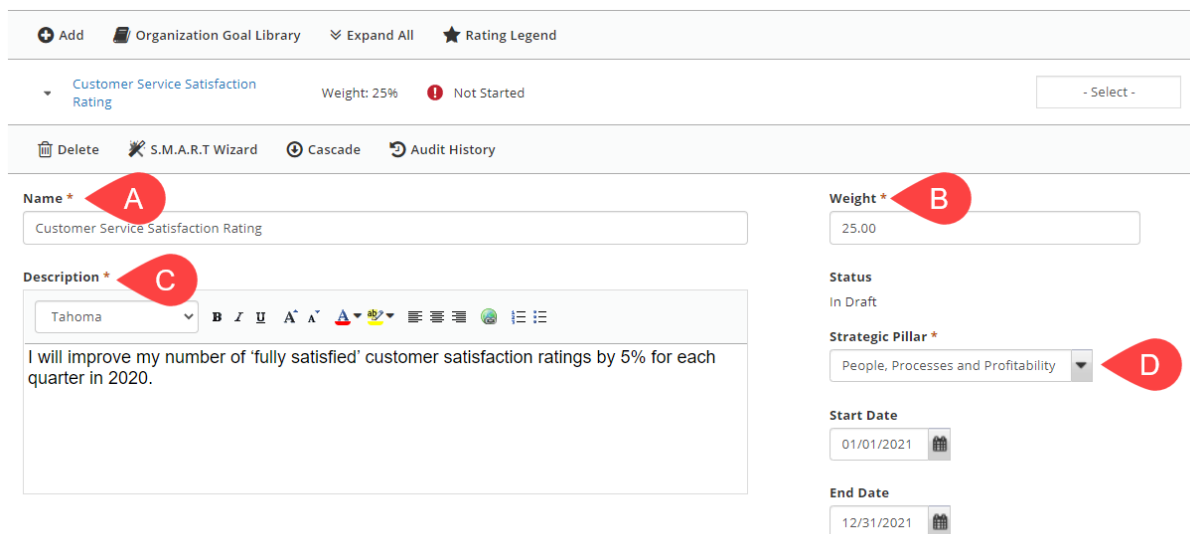
Weighting of the instruction: 65%

+ 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 Picker] [List Icon] [Table Icon] [Link Icon] [Unlink Icon]

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 Icon]

End Date 12/31/2021 [Calendar Icon]

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

OVERVIEWGOALS**COMPETENCIES**MY DEVELOPMENT PLANATTACHMENT(S)CONTINUOUS FEEDBACK

Goal Instruction text will go here.

Weighting of the Goal section: 65%

+ AddOrganization Goal LibraryExpand 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

OVERVIEWGOALS**COMPETENCIES**MY DEVELOPMENT PLANATTACHMENT(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

The screenshot shows the 'TASKS: SUPER DUPER CERTIFICATION' section. On the left, under 'OBJECTIVES', there is a list with 'Super Duper Certification' and 'Default Objective'. A red arrow points from this list to the 'Add Task' button in the 'TASKS' section. The 'Add Task' button has a dropdown menu open, showing 'External Task' and 'Catalog Task' as options.

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

The screenshot shows the 'ADD CATALOG TASK' form. It includes fields for 'Select Activity' (Admin Tool Training), 'Description', 'Activity Type' (Online Course), and 'Plan Period(s)' (2021). There are also fields for 'Start Date', 'End Date', and 'Objective' (Default Objective). A red arrow points from the 'Objective' dropdown menu to the 'SAVE' button at the bottom right.

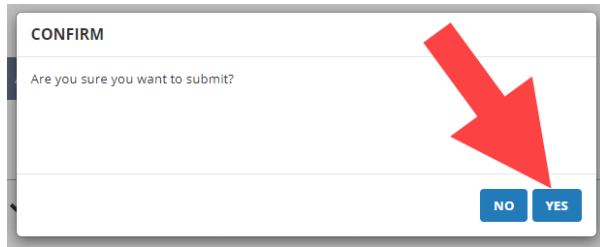
16. Click OK to return to Performance Appraisal.

The screenshot shows the 'PROGRESS: SUPER DUPER CERTIFICATION' section. It displays a progress bar and a table of tasks. A red arrow points from the 'OK' button at the bottom right to the 'OK' button.

17. Click **Submit**.

The screenshot shows the 'Draft Goals' section. It includes a progress bar with steps: Goal Setting, Draft Goals, Approve Goals, Mid-Year, and Year-End. Below the progress bar, there are buttons for 'Save', 'Submit', 'Print Preview', and 'Spell/Legal Check'. A red arrow points from the 'Submit' button to the 'Submit' button.

18. Click **YES**



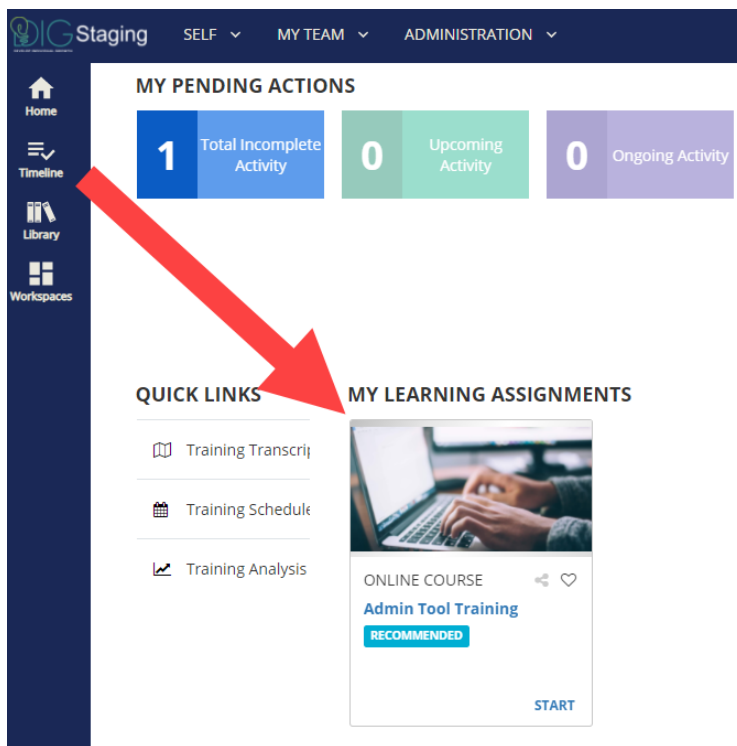
A confirmation dialog box titled "CONFIRM" with the text "Are you sure you want to submit?". At the bottom right, there are two buttons: "NO" and "YES". A large red arrow points to the "YES" button.

19. Click RETURN TO HOME



A system confirmation message with the heading "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 eMoney dashboard. 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".

MY PENDING ACTIONS

Count	Activity
1	Total Incomplete Activity
0	Upcoming Activity
0	Ongoing Activity

QUICK LINKS

- Training Transcrip
- Training Schedule
- Training Analysis

MY LEARNING ASSIGNMENTS

ONLINE COURSE  

Admin Tool Training

RECOMMENDED

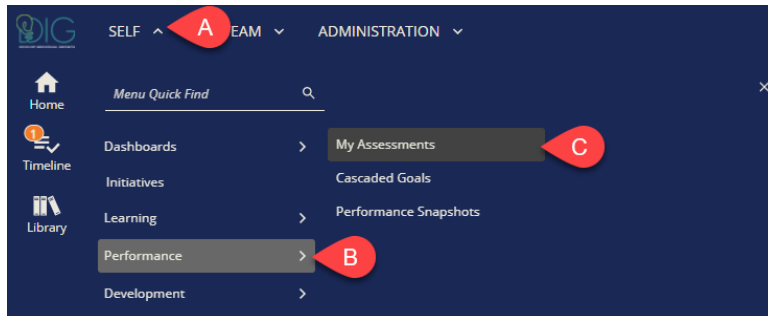
[START](#)

A large red arrow points from the "Timeline" icon in the sidebar to the "MY LEARNING ASSIGNMENTS" section.

Viewing Your Performance Appraisal Form

After you submit your performance appraisal form, and it is approved you can view or download a copy to reference throughout the year.

1. Access My Assessments
 - a. Click SELF in the header
 - b. Click Performance
 - c. Click My Assessments

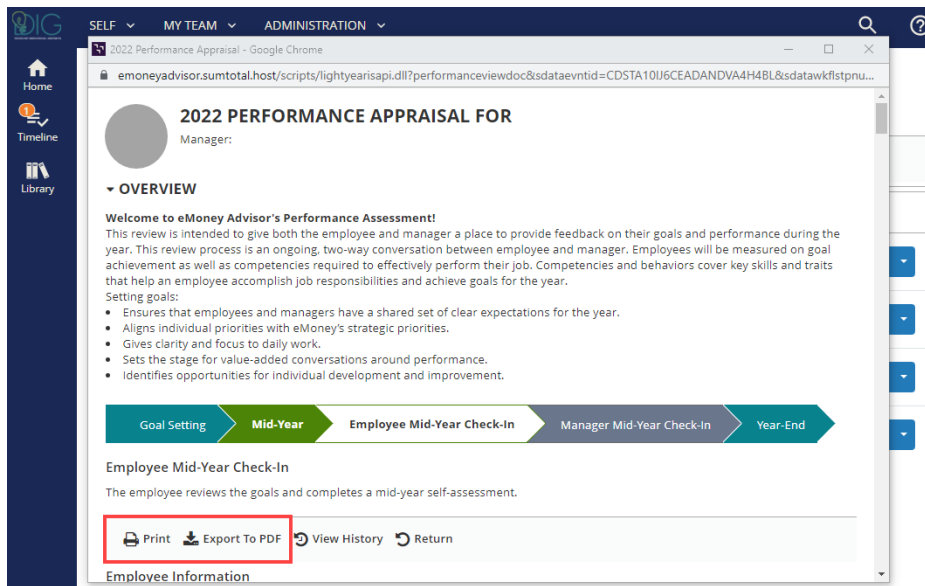


2. Click the down arrow to the right of the <VIEW> button for the desired year and click View Form.
- 3.

PERFORMANCE ASSESSMENTS FOR DOUG COOPER

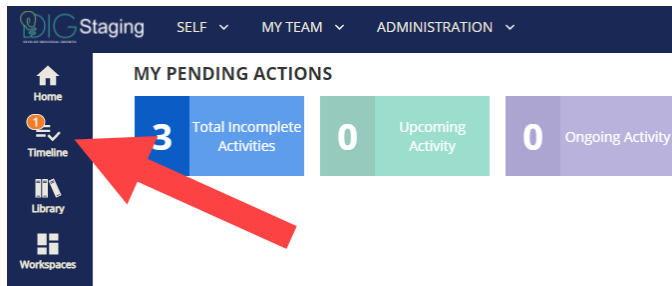
Filter Remove Filter				
Assessment	Status	Start Date	Due Date	Action
2022 Performance Process Doug Cooper	Started	01/21/2022	01/21/2022	VIEW
2021 Performance Process Doug Cooper	Complete	01/21/2021	01/21/2021	VIEW

4. The Performance Appraisal will open in a new window.

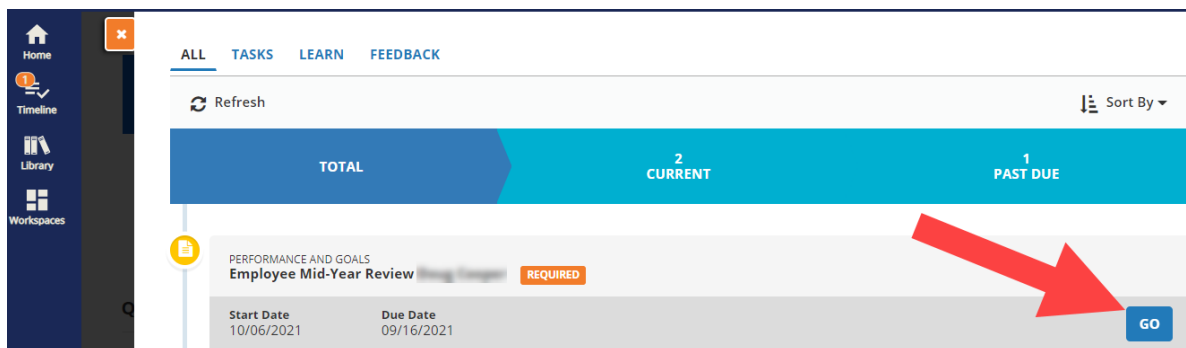


Mid-Year Review

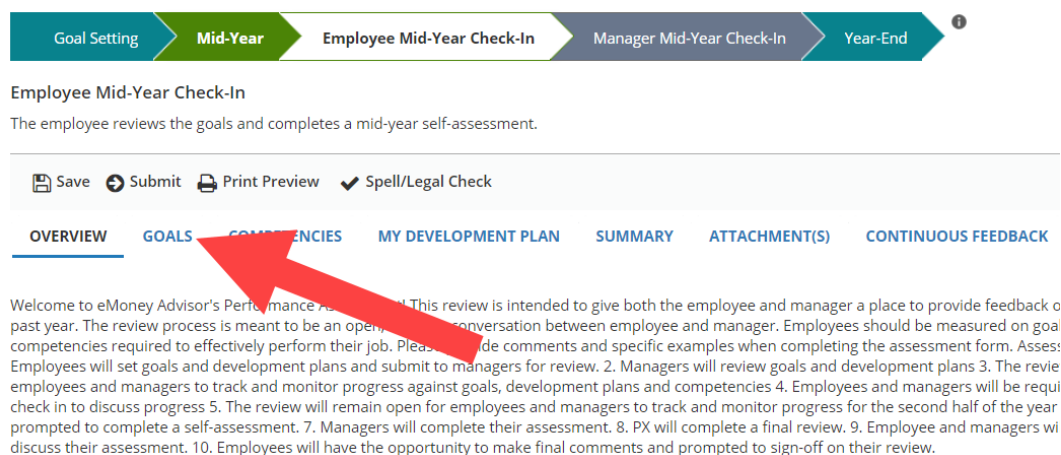
1. Click the **Timeline** icon in the Control Panel



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 *

Sample Goal 1

Description *

Tahoma

SMART Sample goal 2 text

Results Achieved

Tahoma

Weight *

30.00

Status

Mid-Year Review

Strategic Pillar *

Redefine Financial Advice

Start Date

01/01/2021

End Date

12/31/2021

Completion Status

- Select -

- 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 is 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 12/31/2021

Open Sans
on track

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.
- 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.

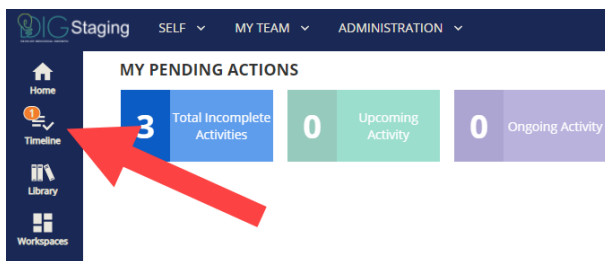
RETURN TO HOME

End of Year Review and Submission

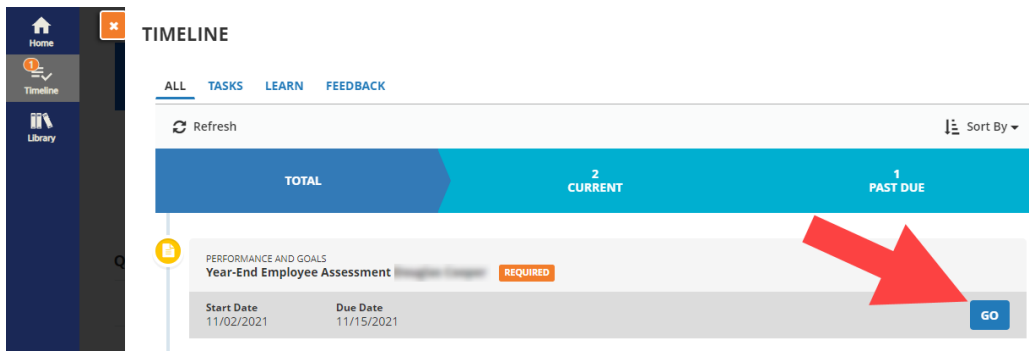
Self-Appraisal Process

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.

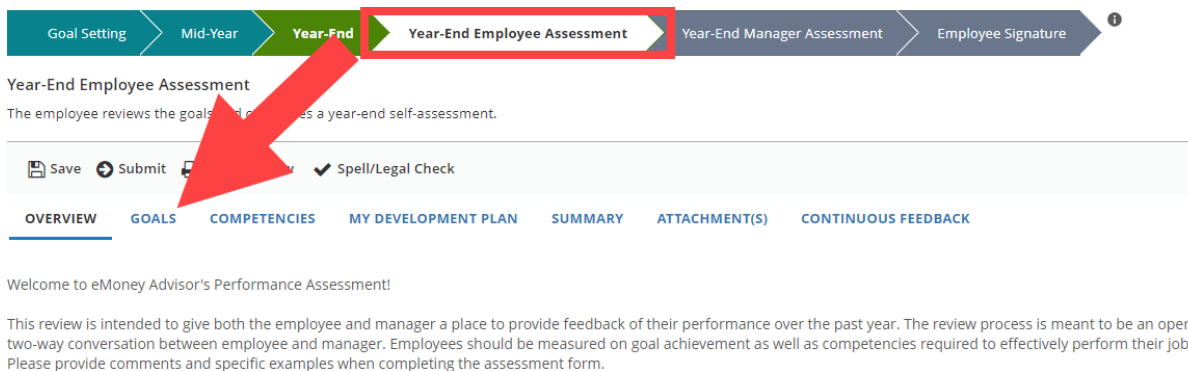
1. Click the **Timeline** icon in the Control Panel



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.



- 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

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U

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A⁻

🌈

🔗

📎

📌

📋

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⁻

🌈

🔗

📎

📌

📋

Behind

Canceled

Completed

Not Started

On Track

status

On Track

This a comment regarding results achieved.

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

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

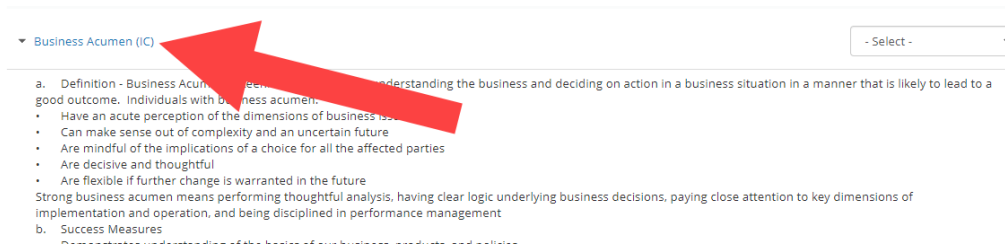
GOALS

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:

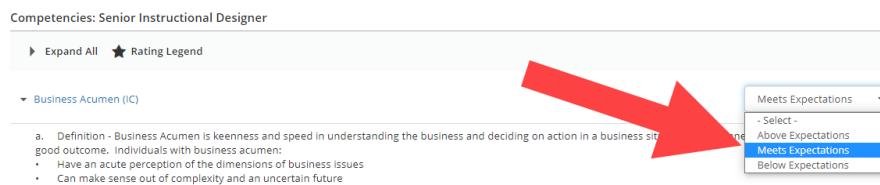
- Have an acute perception of the dimensions of business issues
- Can make sense out of complexity and an uncertain future
- Are mindful of the implications of a choice for all the affected parties
- Are decisive and thoughtful
- Are flexible if further change is warranted in the future

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

Competencies and Attributes of the Senior Instructional Designer

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

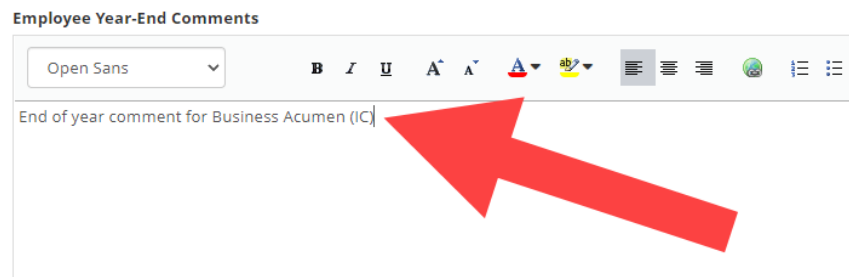
- Select -

Above Expectations

Meets Expectations

Below Expectations

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



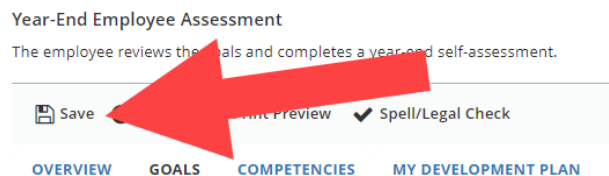
Employee Year-End Comments

Open Sans

B I U A+ A- A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

End of year comment for Business Acumen (IC)

14. Click <Save>.



Year-End Employee Assessment

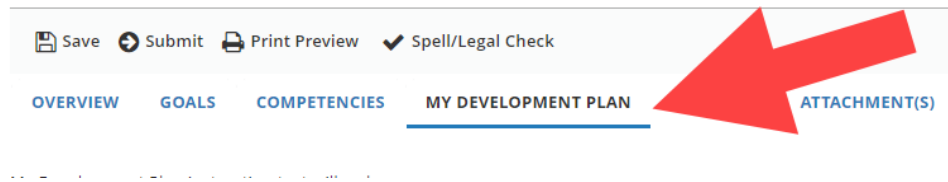
The employee reviews their goals and completes a year-end self-assessment.

Save Preview Spell/Legal Check

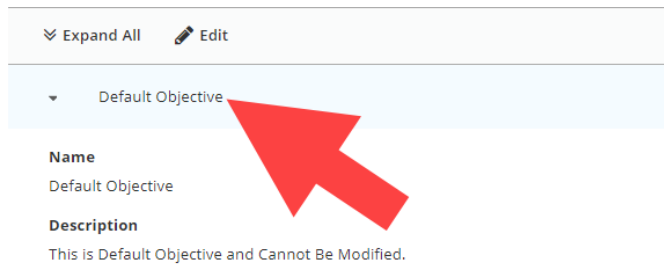
OVERVIEW GOALS COMPETENCIES MY DEVELOPMENT PLAN

15. Repeat steps 11 – 14 for each competency.

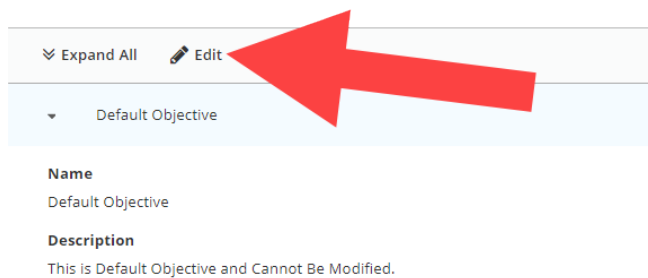
16. Click on the My Development Plan



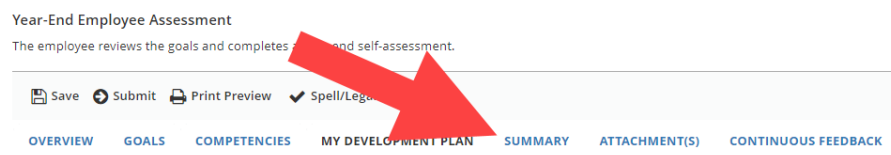
17. Click the name of each entry in your development plan to review it as desired.



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



19. Click the Summary Tab



20. Enter End of Year comments (required)

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

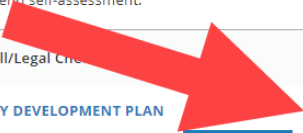
The employee reviews the goals and completes a year-end self-assessment.

Save

Submit

Print Preview

✓ Spell/Legal Check



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							DELETE
eMoney Color Palette.png							DELETE
DIG Leading With Purpose Registration Instructions.pdf							DELETE
Choose File No file chosen							ADD

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	DELETE

24. Click **YES**

CONFIRM

Are you sure you want to submit?

[NO](#) [YES](#)



25. Click RETURN TO HOME

SYSTEM CONFIRMATION

The information you entered was successfully submitted.

[RETURN TO HOME](#)





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.

The screenshot shows a web interface for a "Year-End Employee Assessment". At the top, there are buttons for "Save", "Submit", "Print Preview", and a checkmark icon. 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 box down to a section titled "Feedback Comments". This section contains a text box with the text: "Please update your assessment for the training goal to reflect the performance training guides you created. The rating for this is meets expectations."

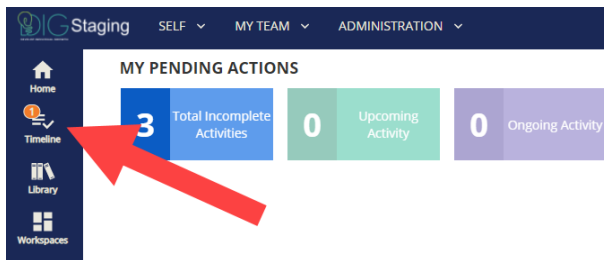
Repeat the self-appraisal process outline above to make required adjustments/comments and re-submit.

End of Year Final Sign Off

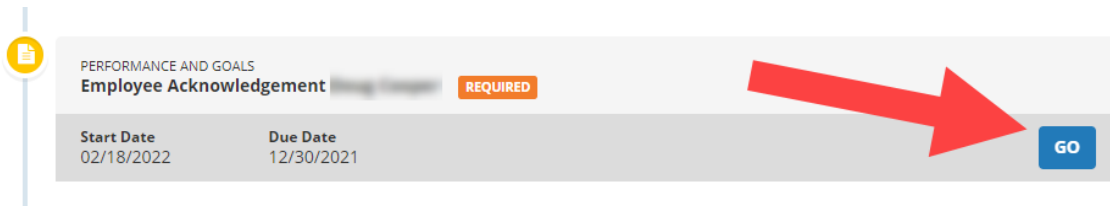
Your manager will schedule an end of year performance review meeting. This meeting will a discussion about the results achieved from the previous year and to begin setting expectations for the upcoming year.

Meet with your manager. After the meeting your manager will Sign and submit the performance review. After it is submitted the system will route the employee acknowledgment activity to your timeline.

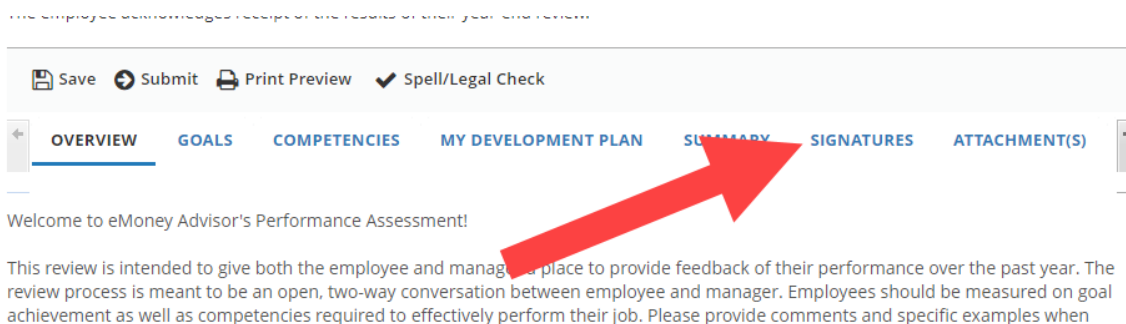
1. Click the **Timeline icon** in the Control Panel



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



3. Click the **Signatures** tab.



4. Click <Sign>.

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

Do NOT click Submit on 2021 year end goals until March 10, 2022

Manager 1	Employee
Manager 1 Pam Henry Sign Date 02/18/2022 I confirm that I have met with this employee and discussed their review. ☒	Employee * SIGN CLEAR Sign Date *

5. Click **Submit**.

Save Submit Print Preview Spell/Legal Check

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

Do NOT click Submit on 2021 year end goals until March 10, 2022

Manager 1	Employee
Manager 1 Pam Henry Sign Date 02/18/2022 I confirm that I have met with this employee and discussed their review. ☒	Employee * SIGN CLEAR Sign Date * 02/22/2022

6. Click <Yes> to confirm the submission.

CONFIRM

Are you sure you want to submit?

NO **YES**

7. Click <Return to Home>.

SYSTEM CONFIRMATION

The information you entered was successfully submitted.

RETURN TO HOME