

The Performance Plan allows a supervisor and an employee to establish performance goals and clarify expectations for the performance review period. At the beginning of the performance management process, the supervisor creates a Performance Plan. After meeting with the employee to discuss expectations, goals and objectives, the supervisor sends the plan to the employee for acknowledgment.

Create the Performance Plan

To create a Performance Plan for your employee, go to **Your Action Items** section of the Home page and click on the **View** button under the **Action** column for the task "Planning Review Meeting."

Welcome to the Employee Portal, Tom Selleck

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Your Action Items

Search: <input type="text"/>				
Item	Description	Due Date	Status	Action
Program for Jack Dawson	Planning Review Meeting	2015-12-11 Due 2 months ago	Overdue	View

1. This is a reminder for you to meet with the employee to discuss the Plan. Select the blue **Complete** button.



To create a Performance Plan for your employee, go to **Your Action Items** section of the Home page and click on the **View** button under the **Action** column for the task "Supervisor Creates Performance Plan."

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Your Action Items

Search: <input type="text"/>				
Item	Description	Due Date	Status	Action
Program for Jack Dawson	Supervisor Creates Plan	2015-12-11 Due 2 months ago	Overdue	View

1. On the **Core Competencies** tab, core competencies that are listed are for all employees. Below the core competencies is an area where the supervisor can list Position Specific Job Tasks. These are additional position specific job tasks that are aligned with the job description.

Position Specific Job Tasks

The screenshot shows the 'Position Specific Job Tasks' form. It features a large text area for entering tasks, a 'Remove Entry?' checkbox, an 'Add Entry' button, and 'Save Draft' and 'Next' buttons at the bottom. Callouts provide instructions: 'To remove entry, select the check box, then select Save Draft' points to the 'Remove Entry?' checkbox, and 'To add an entry, select add entry button' points to the 'Add Entry' button.

2. On the **Individual Goals** tab, you can add individual performance goals or objectives for the review period. To add Goals/Objectives,
 - a. Enter a title in the **Individual Goal Name** box.
 - b. Select Professional.
 - c. Type description of individual goal.
 - d. Select a **Target Completion Date**.
 - e. To add another **Individual Goal**, click on the **Add Entry** button and repeat steps a – d.
 - f. To remove an **Individual Goal**, click on the **Remove Entry**, check box and select the **Safe Draft** button.

The screenshot shows the 'Individual Goals' form. It includes fields for 'Individual Goal Name', 'Goal Type' (with a dropdown menu), 'Individual Goal Description', and 'Target Completion Date'. There is also a 'Remove Entry?' checkbox. Callouts A, B, C, and D point to these respective fields. Callouts provide instructions: 'To remove entry, select the check box, then select Save Draft' points to the 'Remove Entry?' checkbox, and 'To add an entry, select add entry button' points to the 'Add Entry' button. The 'Save Draft' and 'Next' buttons are visible at the bottom.

3. The **Training and Development Plan** tab, you can add training and development opportunities. To add these opportunities,
 - a. Enter a title in the **Training & Development activity** box.
 - b. Provide an explanation of the training & development activity description field.
 - c. Enter the completion date in the Target Completion Date field by clicking on the text box and using the pop-up calendar.
 - d. To add another **Training & Development Activity**, click on the **Add Entry** button and repeat steps a – c.
 - e. To remove a **Training & Development Activity**, click on the **Remove Entry** check box and select the **Safe Draft** button.

Training & Development Plan

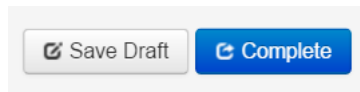
The purpose of recording developmental activities is to formalize and track activities toward performance improvement, career advancement, training, education, etc.
Developmental Activities are not rated at the end of the review period, but are reviewed for progress and future planning.

The screenshot shows a form titled "Training & Development Plan" with the following fields and callouts:

- Training & Development Activity:** A text input field with callout A.
- Training & Development Activity Description:** A larger text input field with callout B.
- Target Completion Date:** A date input field with callout C.
- Remove Entry?:** A checkbox with a callout box stating: "To remove entry, select the check box, then select Save Draft".
- Add Entry:** A button with a callout box stating: "To add an entry, select add entry button".

At the bottom of the form, there are two buttons: "Save Draft" and "Next >".

4. After you are done entering all performance goals for the upcoming performance review period, you can save the Performance Plan by clicking on the **Save Draft** button.
5. Once the draft is saved, you have the ability to print the entire Performance Plan by using your printing options in your web browser.
6. Once you have discussed the Performance Plan with your employee, select the **Complete** button. A popup message appears asking if you are sure you want to complete the plan. Click the **OK** button on the popup window.



7. The employee will receive an automated email indicating there is a task to be completed.
8. It is important that you monitor that the employee has reviewed and acknowledged the Performance Plan, as this is required in order for you to complete the Performance Evaluation at the end of the performance review period.

Additional Information

For additional information, please visit <https://www.nwacc.edu/web/personnel/employee-evaluations>. For additional questions or need assistance, contact evaluations@nwacc.edu.