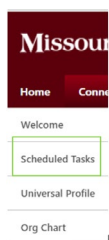


Performance Review – Planning Process

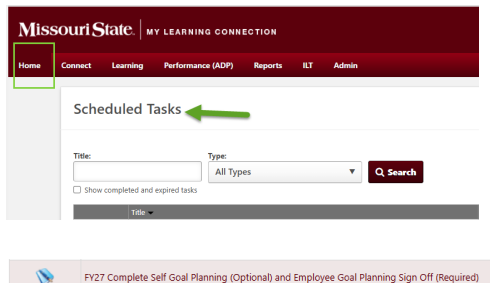
Employee Optional Self Goal Setting

Note: Before you start the Self-Goal Setting process, check with your supervisor on requirements and for any internal due dates.

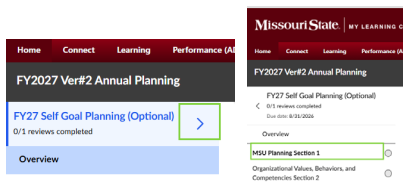
Step 1: Employee clicks on [link provided in notification email](#) or navigates to **Scheduled Tasks** found in My Learning Connection under the **Home** tab on the **Welcome** page.



Step 2: Click on the **FY27 Complete Self Goal Planning** link to access your planning document.



Step 3: Click on the **blue arrow** next to **Self Goal Planning (Optional)** to access the document and sections. Click on each section to open up the dashboard for that area of the plan. **Goals are entered in the MSU Planning Section 1** with **Organizational Values, Behaviors, and Competencies Section 2** being **read only**.



Note: See page 5 of this document to learn how to advance or copy goals from previous years into the new plan.

Section 1: MSU Goal Planning Section

Step 4: Click on the **Add Goals** button located at the top right-hand side of the page to add a goal to your plan. A separate dashboard will open for you to add the goal.

The screenshot shows the 'Create Goals' form in the Missouri State Learning Connection system. The form is titled 'Create Goals' and includes instructions: 'Enter details or import using the SMART Wizard or the Library. Required fields are marked with a red asterisk (*)'. The form is divided into several sections:

- 1** Goal: A text input field for the goal title.
- 2** Measurable Outcomes: A rich text editor for entering a description of measurable outcomes.
- 3** AI Tool: A button labeled 'Help me write it' for AI assistance.
- 4** Dates: A date range selector for 'Start Date' (7/1/2026) and 'Due Date' (6/30/2027), highlighted with a red box.
- 5** Save: A 'Save' button at the bottom right of the form.

Other visible elements include a 'Library' and 'SMART Wizard' tab, a 'Draft' button, a 'Perspective' dropdown menu, and an 'Attachments' section with a 'Browse' button.

- ✓ **1** Step 1: Enter the stated goal.
- ✓ **2** Step 2: Enter the measurable outcomes and description.
- ✓ **3** Step 3: Click on the “AI” tool for assistance with wording.
- ✓ **4** Step 4: Ensure dates are:
 - Start Date is July 1, 2026
 - Due Date is June 30, 2027

Note: This is critical, so your goals are displayed correctly for your online review starting on April 1.
- ✓ **5** Step 5: Click on the **Save** button so your created goal is saved to your plan.

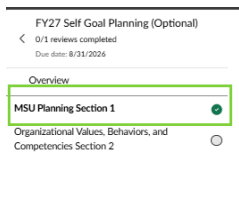
Methods for Creating Goals for your Plan

There are several methods and tools available to both the supervisor and employee for developing and submitting their goals into their online Planning Document:

- Develop the goals on your own utilizing other resources outside of the system.

- Copy previous goals from last year’s goals in MLC. (*See steps on page 5 of this document*)
- Utilize the AI tool available on the goal setting page to help facilitate the process.
- Retrieve goals from the Library which has several categories or Perspectives to choose from: a. MSU 2025 – 2030 Strategic Plan – the five (5) goals are listed where you can add your own measurable outcomes for the selected goal based on your job position.
- Leadership /Supervision – Nine (9) overarching goals for employees that are in leadership or supervisory positions. There are recommended measurable outcomes that can be customized to reflect the specific employee’s job position.
- Job Family Competencies – General goals with suggested measurable outcomes that can apply to a variety of employees based on their specific job position. Our jobs at the university are classified into four (4) Job Families based on a shared nature of work at different skill and responsibility levels. These can be edited to support the individual employee and their job.
- Use the SMART Wizard to create specific, measurable, actionable, relevant, and timely goals. The SMART Wizard contains five sections that cover the distinct aspects of the goal. The wizard guides you through five goal sections that you must complete in order: Specific, Measurable, Actionable, Relevant, and Timely. Note: Since we are not currently using weighted goals or individual tasks, you can utilize portions of the Wizard to develop the goal.
- Up to three (3) attachments can be added to support the goal.

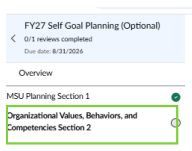
Step 5. Complete Step 4 for each new goal you add to Section 1 before moving forward in the process.



Step 6: Click the Next button to move forward in the form or click Save for Later button if you plan to complete it at a later time.



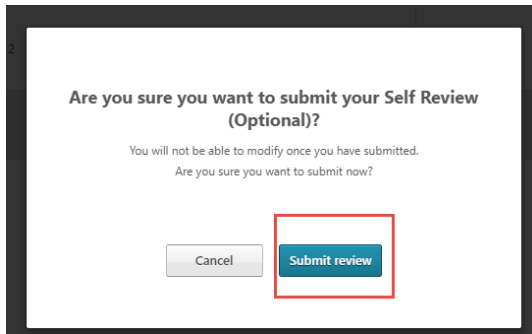
Step 7: Review the four (4) Organizational Values, Behaviors, and Competencies located in Section 2 for any questions or clarifications with your supervisor.



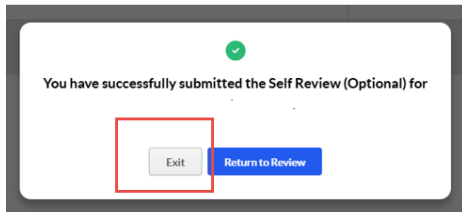
Step 8: Click the [Submit](#) button to send your plan to your supervisor for their review and approval. Click [Save for Later](#) button if you plan to complete it at a later time.



Step 9: If you click submit, you will receive a [confirmation message](#) for the requested action.



Step 9a: Click the [Submit review](#) button to submit the Self Review.



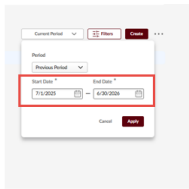
Step 9b: After submitting the review, you will see another confirmation message. Click the [Exit](#) button. The task will no longer be displayed under [Scheduled Tasks](#) until your supervisor submits your Planning document for your signature and you receive a notification.

Advancing (copying) Goals in My Learning Connection from a Previous Plan Year

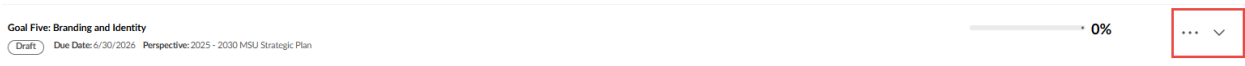
Note: The goals should be advanced (copied) as part of the Self Goal Planning process prior to you submitting your plan.

Step 1: Click on the Performance (ADP) tab, select the Goals option in the dropdown. on the Welcome page. Your Goal page and dashboard will open.

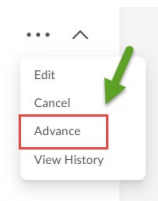
Step 2: Adjust the Start and Due dates to reflect the previous year cycle to locate the goals.



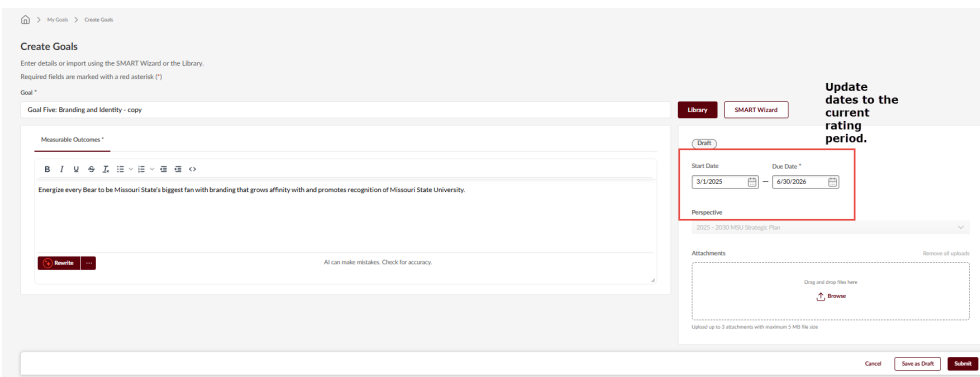
Step 3: Locate the goal you are wanting to copy forward and click on the 3 dots to expand drop down menu.



Step 4: Select the Advance option.



Step 5: Your Goal Dashboard for the goal selected will open.



Step 6: Update the dates to the current cycle:

A screenshot of a web form in 'Draft' mode. A red box highlights the 'Start Date' and 'Due Date' fields. The 'Start Date' is set to 7/1/2026 and the 'Due Date' is set to 6/30/2027. Below the date fields, the 'Perspective' is listed as '2025 - 2030 MSU Strategic Plan'. There is also an 'Attachments' section at the bottom.

Step 7: Click the Submit button.

A screenshot of a button bar containing three buttons: 'Cancel', 'Save as Draft', and 'Submit'. The 'Submit' button is highlighted in a darker color.

Step 8: Navigate back to [Scheduled Tasks](#) and to your Self Goal Planning document to view advanced (copied) goal.

A screenshot of a 'MSU Planning Section 1' document. It shows two goal entries. The second goal, 'Pending Approval', has a 'Start Date' of 7/1/2026 and a 'Due Date' of 6/30/2027, which are highlighted with a red box. A green arrow points to the goal's title.

Note: Please verify the goals that you Advanced(copied) forward to your new plan are correct or do not need any updates. All advanced (copied) goals and newly developed goals should be added to your plan prior to submission to your supervisor during the self goal planning period.