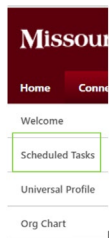


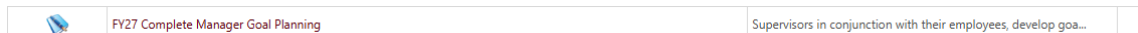
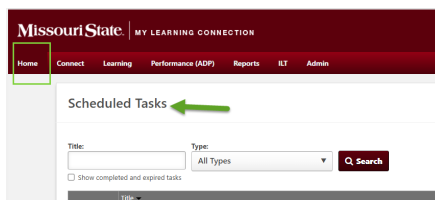
# Performance Review – Planning Process Manager

**Note:** Before you start the Performance Planning process, ensure you have provided guidance to your employee(s) about completing self-planning for goals and submitting them to you for your review and approval of their plan(s).

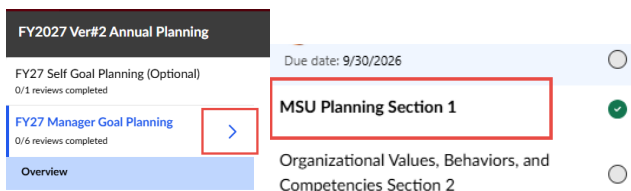
**Step 1:** Manager clicks on the [link provided in their notification email](#) or navigates to **Scheduled Tasks** found in My Learning Connection under the **Home** tab on the **Welcome** page.



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

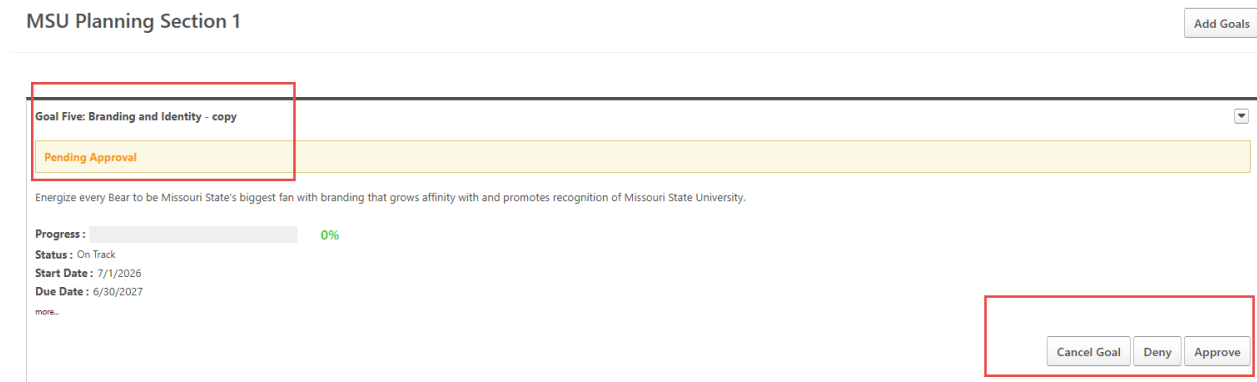


**Step 3:** Click on the **blue arrow** next to **Manager Goal Planning** to access your team's planning documents. Scroll down to locate a specific employee. Click on each section to open up the dashboard for that area of the plan. **Goals are entered in the MSU Planning Section 1** with Organizational Values, Behaviors, and Competencies Section 2 being read only.

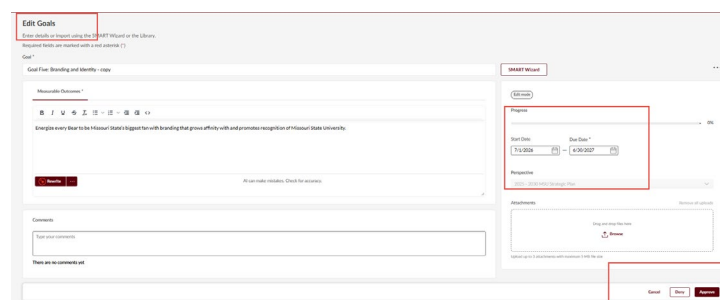


## Section 1: MSU Goal Planning Section – You can **approve employee submitted goals, add new goals, and copy goals (Advance)** from previous plan years.

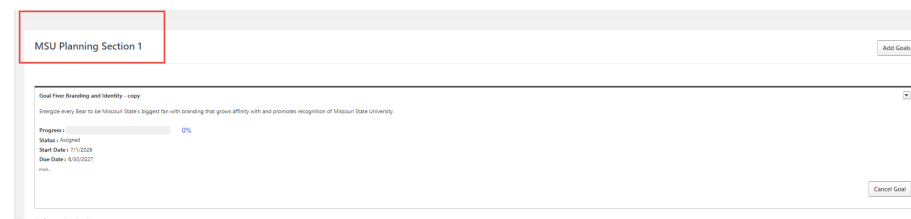
**Step 4: Employee Submitted Goals** - If your employees submitted goals through the Self Goal Planning process, you may have goals already displayed in the dashboard that need approval before proceeding. There are three (3) actions you can take with a submitted goal: **Cancel, Deny, or Approve.**



**Step 4a: After selecting an action, you will be redirected to the **Edit Goals** dashboard to complete the process. Again, make sure the dates reflected are for the current rating period. For example, for FY27, the **Start Date** would be **July 1, 2026**, and the **Due Date** would be **June 30, 2027**.**



**4b: Make any necessary updates and click the **Approve** button. You will be asked to **confirm response** before being redirected back to the employee's plan to continue the process.**



**Step 5: Add New Goals** - Click on the **Add Goals** button located at the top right-hand side of the page to add a goal to their plan. A separate **Create Goals** dashboard will open for you to add the goal.

Add Goals

- ✓ **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 their plan.

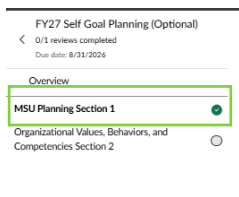
## Methods for Creating Goals for your Plan

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

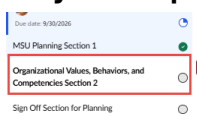


**Step 7: Copy Goals from Previous Years (Advance option) – See page 7 for details.**

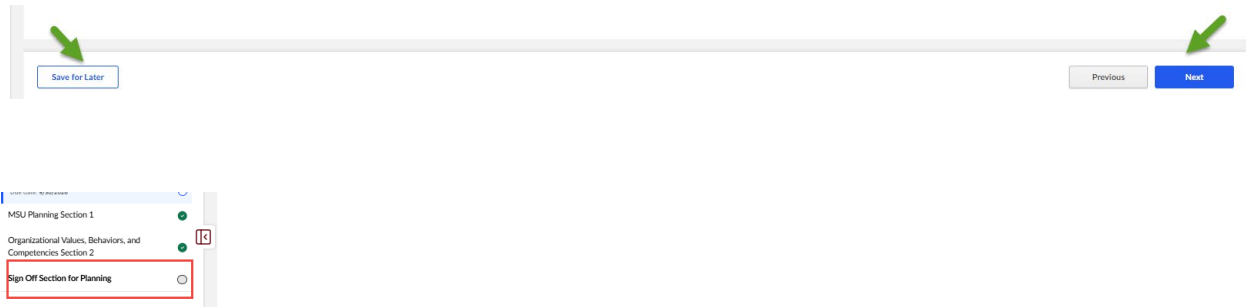
**Step 8: After all goals have been submitted, click the Next button to move forward in the form or click Save for Later button if you plan to complete it at a later time.**



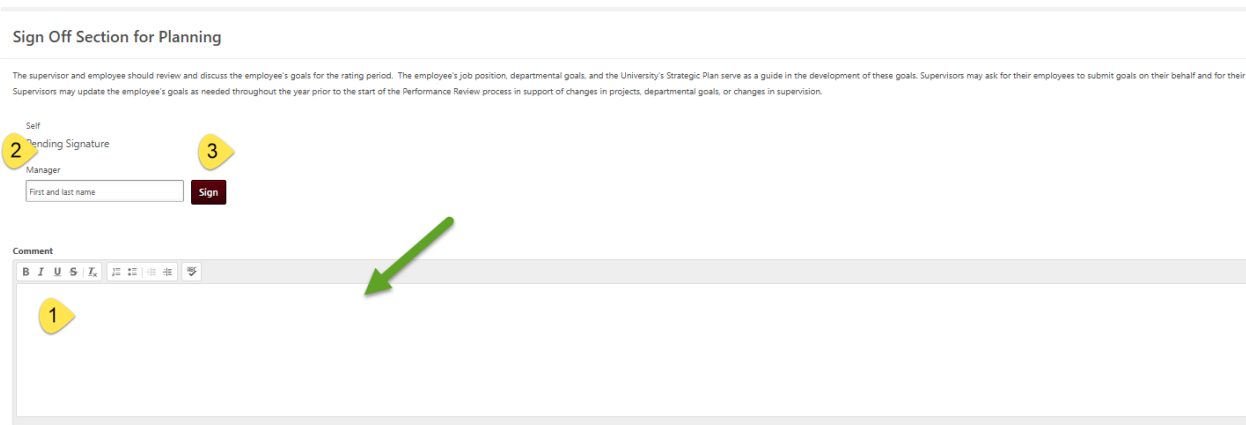
**Step 9: Review the four (4) Organizational Values, Behaviors, and Competencies located in Section 2 and be prepared to answer any questions or provide clarification for your employees.**



**Step 10: Click the [Next button](#) to move forward in the form to the [Sign Off Section for Planning](#) to send the plan to your employee for their signature. Click [Save for Later button](#) if you plan to complete it at a later time.**



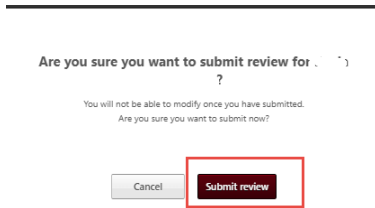
**Step 11: Enter any additional information to the [Comment Section](#), type your [First and Last name](#) into the field and click the [Sign button](#) to complete the manager step for the process.**



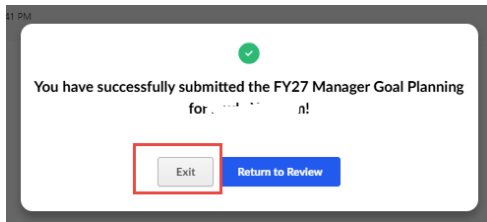
**Step 12: Click [Submit button](#) to send the plan to your employee for their signature to complete the process.**



**Step 12a: If you click submit, you will receive a [confirmation message](#) for the requested action. Click the [Submit review](#) button to submit the review document.**



**Step 12b: After submitting the review, you will see another confirmation message. Click the [Exit button](#).**

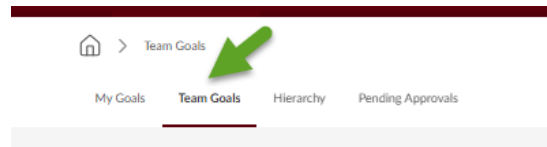


## Step 7: Advancing (*Copying*) Goals in My Learning Connection from a Previous Plan Year

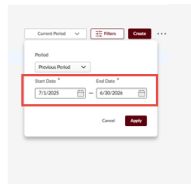
**Note:** The goals should be advanced (copied) as part of the goal setting process with your employee(s) prior to submitting their plan.

**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.

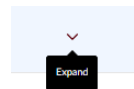
**Step 2:** Select the **Team Goals** option.



**Step 3:** Adjust the **Start and Due dates** to reflect the previous year cycle to locate the goals.



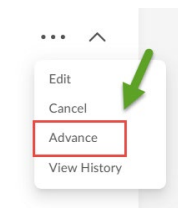
**Step 4:** Scroll down to locate the employee and click on the down arrow located to the right of their information to expand the goal details.



**Step 5:** Locate the goal you are wanting to copy or advance forward and **click on the 3 dots** to expand drop down menu.



**Step 6:** Select the **Advance** option.



## Step 7: Your **Goal Dashboard** for the goal selected will open.

## Step 8: **Update the dates to the current cycle:**

## Step 9: **Assignment to employee(s)** is located at the bottom left-hand side of the screen.

### Step 9a: **Select My Team** option:

### Step 9b: **Select individual employees or All Direct reports** to assign the goal:

### Step 9c: **Click the Submit** button.

**Step 10: Navigate back to [Scheduled Tasks](#) and to the employee’s planning document to view the goals you advanced forward to the new plan.**

The screenshot displays the 'MSU Planning Section 1' interface. It features two goal cards. The top card is titled 'Goal Title: Branding and Identity - copy' and includes a progress bar at 0%. Below the card, there are two buttons: 'Add Goal' and 'Cancel Goal'. The bottom card is titled 'Goal Title: Student Program' and also has a 0% progress bar. A red box highlights the 'Add Goal' button on this card, and a green arrow points to it from the left. Similar to the top card, it has 'Add Goal' and 'Cancel Goal' buttons.

***Note: Please verify the goals that you advanced forward to the new plan are correct or do not need any updates. All copied goals and newly developed goals along with any approved employee submitted goals should be added to the employee(s) plan prior to your sign off on the plan document.***