For Rating Officials -

Create a Performance Plan

Complete these steps to create a Performance Plan:

1. Begin at the ***Performance Appraisal Application Main Page***.
2. Select the **Create** button next to Performance Plan on the top right side of the page to view the ***Create Performance Plan: My Rating Hierarchy*** page.
3. Select the icon in the Create column to the right of the employee's name to view the ***Create Performance Plan: Setup Details*** page.
4. Review and make any necessary change(s) to the default values.
5. Select the **Next** button to view the ***Create Performance Plan: Overview*** page.
6. Enter information in the **Relevant Organizational Mission/Strategic Goals** field.
7. Select the **Add Objective** button to view the ***Add Job Objective*** page.
8. Enter information into the **Objective Number** and **Objective Title** fields.
9. Enter draft Job Objective text into the **Job Objective** field.
10. Select the Contributing Factor(s) that apply to the Job Objective.
11. When the Job Objective information is complete, select one of the following buttons at the top right side of the page:
    - Select the **Save and Update Another** button to add another Job Objective. Repeat steps 8 through 10 to enter additional Job Objectives.
    - Select the **Save and Return to Overview Page** button to view the ***Create Performance Plan: Overview*** page when all of the Job Objectives are completed.
12. On the ***Create Performance Plan: Overview*** page, select the **Next** button to view the ***Create Performance Plan: Review*** page.
13. Select the **Continue** button to receive confirmation the Performance Plan has been saved and view the ***Rating Official Review*** page.

14. Select one of the following:

- Select the **Transfer to Employee** button to transfer the Performance Plan to the Employee. **Note:** You cannot continue to edit the plan after transferring it.

- Select the **Update Plan/Appraisal** button to view the ***Update Plan/Appraisal*** page, where you can repeat steps 4 through 13.

- Select the **Return to Main Page** link in the bottom left corner of the page to view the ***Performance Appraisal Application Main Page.***

15. Select **Logout** at the top right side of the page to exit.