How to Complete the SHRA Performance Plan Form

1. Login to the AppState Careers system.

2. Go to the Performance Management Portal.

3. Click on “Performance Plan Creation”.

4. Read the first two tabs.

**Tabs one and two:**
- Links to video tutorials and resources
- Cycle and schedule
- Approvers’ workflow
- Program components
- Rating scale
5. Add weights for the Institutional Goals (remember these must add up to 50).

The institutional goals are designed to cover every aspect of the employee’s position description. All of this work is done for you, you just have to talk about it!

Use the position description to compare the institutional goals and essential duties!

Access the position description by clicking on the job title under your employee’s name.
The comments box on the institutional goals section is optional, meaning you only need to talk about the goals. You can choose to enter comments for clarification or to indicate areas that need improvement.

Remember: The clearer you are about expectations, the easier it will be to enter ratings at the end of the year!

If your employee is NOT a supervisor, you still have to enter a weight. Enter a “0” here if there are no supervisory responsibilities.
6. Add names, descriptions, and weights for 2-4 Individual Goals, and a weight for the Organizational Values Goal at the bottom of the page (remember these must add up to 50). Select "Add Entry" to add another goal.

The individual goals are NOT intended to cover all parts of the position description. (That’s what the institutional goals do.) Individual goals should be related to projects, critical functions, or common goals that each employee will work toward.

The organizational values goals focuses on the interactions and relationships we build in the workplace. This goal is a shared goal that helps support the University’s strategic initiative of supporting diversity and inclusion.

Check your math!

- Institution Goals total must = 50
- Individual Goals total must = 50
  (This includes the weight for the Organizational Values Goal)
7. Enter professional development activities on the Career Development Plan tab.

8. Click “Complete” to send the plan to the Second Level Supervisor.

9. Second Level Supervisor: Click “Approve” to send the plan to the employee for acknowledgment.

10. Employee: Click “Acknowledge” to indicate that you and your supervisor have met and discussed your plan.