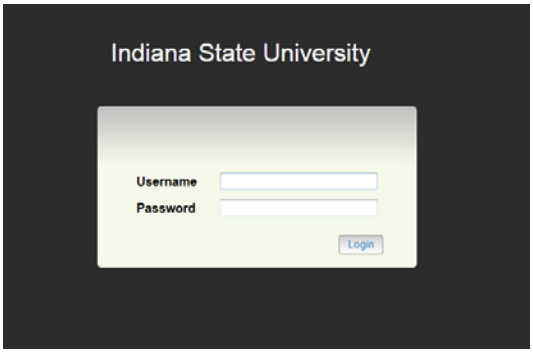
Creating Plan/Goals Instructions

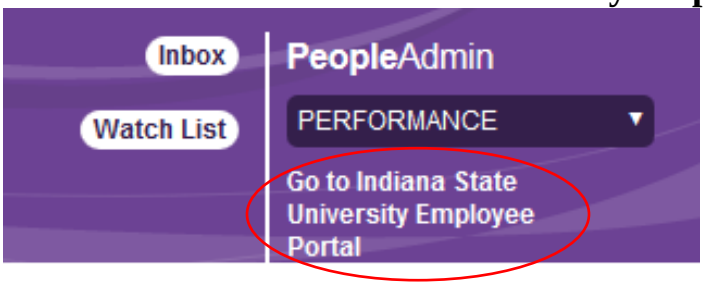
Please read through this document carefully.

Log into https://jobs.indstate.edu/hr/ or from the Human Resources website main page select the link that reads People Admin (Applicant Tracking) from the Performance Evaluation Materials header.

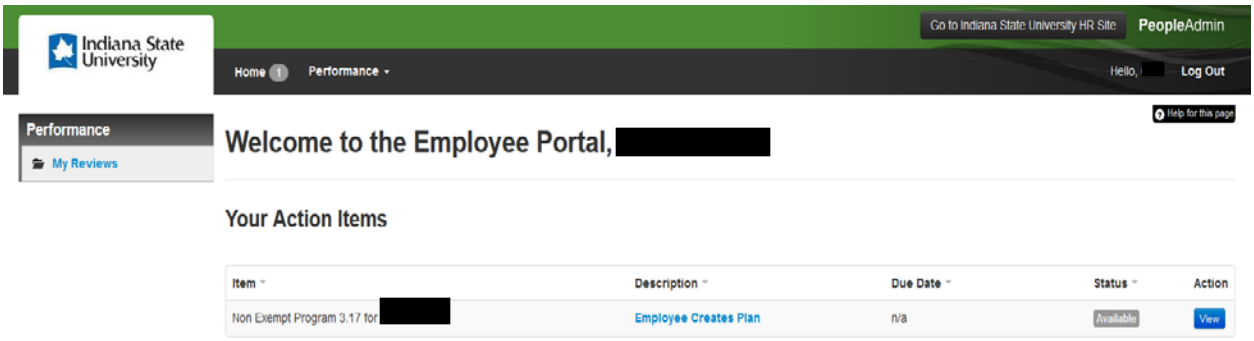
Please enter your University Username and Password.



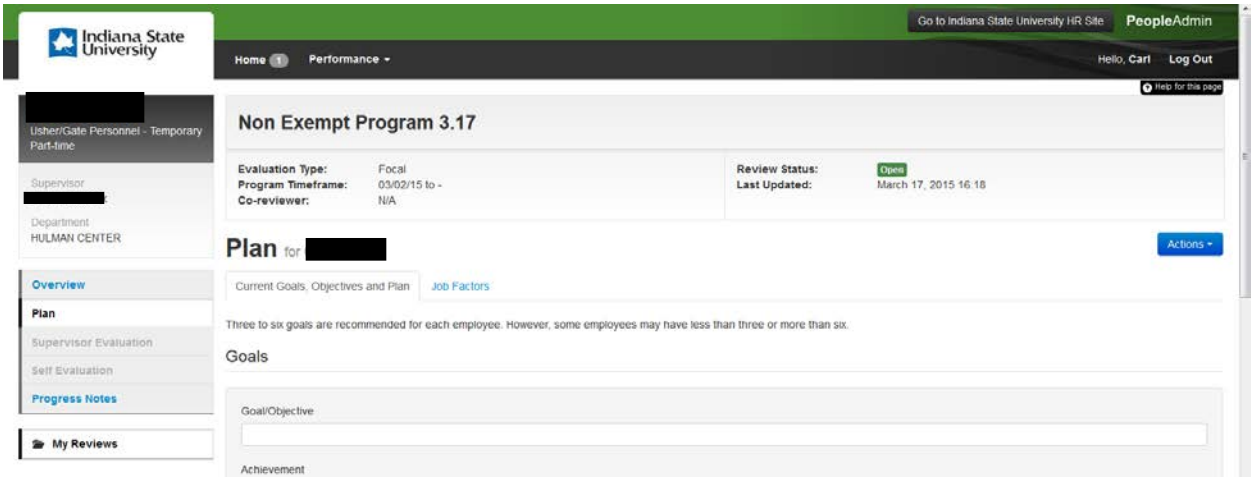
Click on **Go to Indiana State University Employee Portal** as shown below.



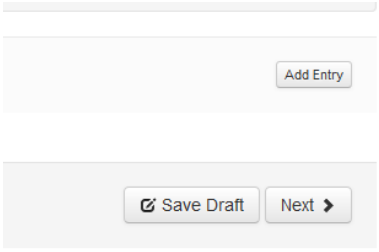
This will bring you to the following screen. You will see the **Home** tab across the top. Clicking on Home will bring you to your **Action Items** (to-do list).



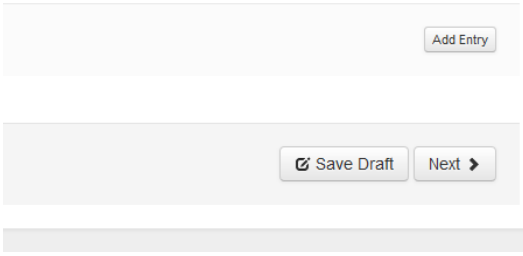
Click on **Employee Creates Plan;** this will bring you to your **Goals.**



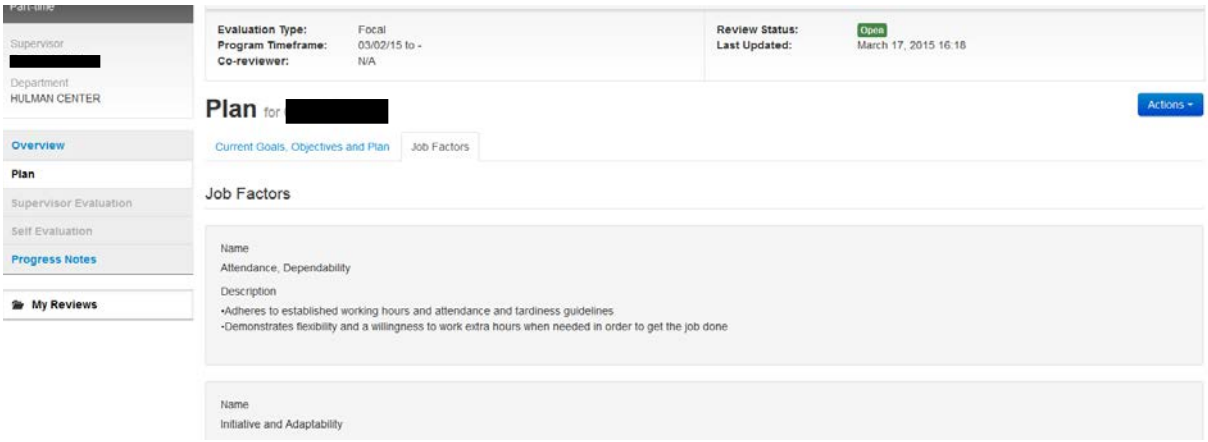
You can add as many goals as you need by simply clicking on the **Add Entry** at the bottom of the page. Each new entry is displayed at the end of the list so scroll down to enter each new goal.



Once you have added all your goals you can click on **Save as draft** (which will allow you to come back to it after you have discussed your proposed goals with your supervisor or determined any additional goals).



Or, you can **Click on next** which will bring you to the **Job Factors Page** (Please review these factors as you will be rated on them for the next evaluation period)



Once you have completed entering your goals and reviewing your job factors, click on the complete button. NOTE: Once you select **Complete** and your supervisor approves the goals, you cannot change or add to the goals without contacting Human Resources so they can reopen the task.

Once you have completed your **Plan,** your supervisor will be notified by email and they will log into their Employee Portal and review the goals you have written. They can **Approve, Revise, or Return.**

****** If the supervisor returns the plan, the employee will go back and make corrections, add additional goals, or change goals. If the supervisor revises the plan, they have added goals or made changes to existing goals. Once the employee reviews the changes, they will need to select **Complete** and this will return the **Goals Plan** back to your supervisor.

When the supervisor **Approves** the Plan, you are done and will not need to complete anything else until the end of review period. At the appropriate time, you will be notified by email that it is time to complete the **Employee self-evaluation**.

A feature of the system is the ability to track your progress using "Progress Notes" so instead of tracking items on paper, you can record your activities electronically. Both the employee and the supervisor can enter notes and they are private. The supervisor cannot see what the employee writes nor can the employee see what the supervisor writes. NOTE: Even though progress notes are private, make sure the content is business appropriate, as they could be discoverable if subpoenaed.

Questions regarding performance evaluations should be directed to Human Resources at 4114.