1. From the Home Dashboard, click on the timeline icon in the upper right hand corner. You will see a list of all tasks and upcoming classes. Navigate to the performance task and then click “Go” on the right hand side.

2. You will be sent to the overview tab of the performance review. To start entering your goals, click on the goals tab.

3. To start entering your goals, click on the goals tab.
4. Once on the goals tab, click the “Add” button to enter your goals.

5. There are 2 required fields that you must enter. The goal title and the description. You also have the ability to enter a start date, end date, and percent complete. The required fields have red asterisks next to them. After you finish a goal you simply click “add” to continue adding goals.
6. Once you are finished on the goals tab, click on the university values tab to go over the values. You won’t have anything to fill out until mid-year and year end when you will be required to fill out a comment box.

**University Values**

*Begin:* Step 1 (Employee) and Step 2 (Supervisor) Review definitions of the University Values. Keep documentation regarding actions related to Values.

*Mid-year:* Step 3 (Employee) and Step 4 (Supervisor) Provide specific examples and comments on the Values.

*Year-end:* Step 5 (Employee) and Step 6 (Supervisor) Enter comments for year-end and reference Appraisal Wizard for assistance. Add your overall rating for the Values.

During any step you may click the “Save” button at any time to save your work and return to it later.

**Values**

- **Accountability**
  
  Takes responsibility and ownership for decisions, actions and results. Accountable for both how and what is accomplished.

- **Integrity**
  
  Demonstrates honest and ethical behavior that displays a high moral standard. Widely trusted, respectful and honorable.

- **Leadership in Excellence**
  
  Demonstrates energy and commitment to improving results, takes initiatives often involving calculated risks while considering the common good.

7. Once you are ready, click “send forward” to move the performance review to the next step. This will send it to your manager for them to complete their part.
8. You will get a pop up asking if you are sure you want to submit this? Click “Yes” and the form will be sent to the next step.