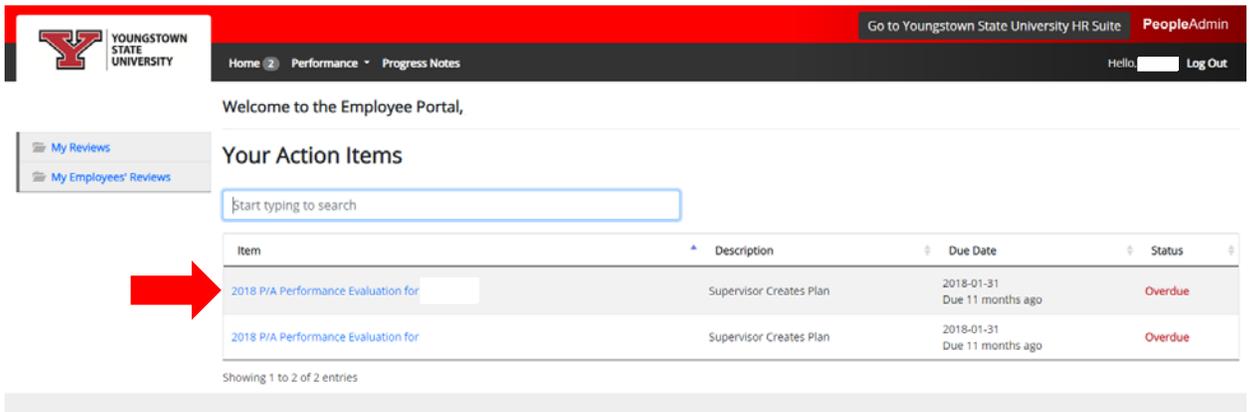


Supervisor Creates Plan

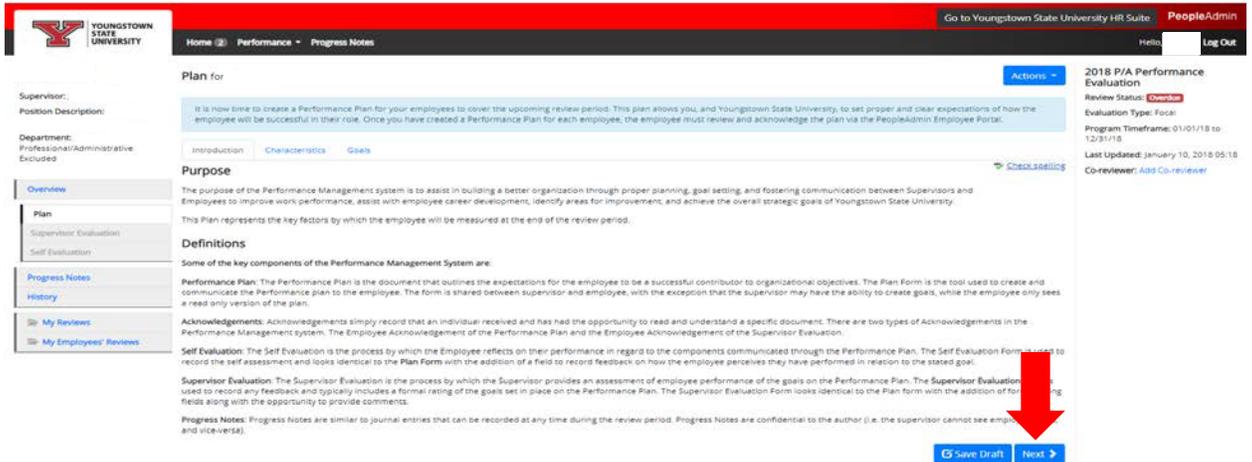
- 1) Log into the PeopleAdmin [Performance Management Portal](#) utilizing your YSU Portal credentials.



- 2) Click on the desired Action Item.



- 3) Review Introduction tab and click Next.



4) Review Characteristics, scroll down, and click Next.

The screenshot shows the 'Characteristics' section of a performance plan. The interface includes a top navigation bar with 'Home', 'Performance', and 'Progress Notes'. A sidebar on the left contains navigation options like 'Overview', 'Plan', 'Progress Notes', and 'History'. The main content area displays a list of characteristics with their descriptions:

- Characteristic PROMPTNESS:** Meets established deadlines.
- Characteristic INNOVATION:** Has new ideas about how to accomplish objectives.
- Characteristic RELATIONSHIPS:** Has good working relationships with peers and others.
- Characteristic ATTITUDE:** Displays a positive and loyal attitude.
- Characteristic RELIABILITY:** Can be depended upon to complete assigned tasks as scheduled.
- Characteristic PROFESSIONAL DEVELOPMENT:** Engages in activities to become or remain current in the field.

At the bottom right of the list, there is a red arrow pointing to a blue 'Next >' button. Other buttons include 'Save Draft' and 'Check Spelling'.

5) Enter additional goals if applicable or click Complete if not applicable.

The screenshot shows the 'Goals' section of the performance plan. The interface is similar to the previous one, but the 'Goals' tab is active. It includes a rating scale and a section for adding goals:

Goals
Remember to make your goals S.M.A.R.T.!

There is a text input field for a goal, a 'Remove Entry?' link, and an 'Add Entry' button. At the bottom right, a red arrow points to a blue 'Complete' button. Other buttons include 'Save Draft' and 'Check Spelling'.

6) Confirm submission by clicking OK.

The screenshot shows a web browser window with a confirmation dialog box from 'ysu-sb.peopleadmin.com' asking 'Are you sure you want to complete this plan?'. A red arrow points to the 'OK' button. In the background, the PeopleAdmin interface is visible, showing a notification 'The Plan has been saved.' and a 'Plan for' page with a 'Check loading' button. The page includes a sidebar with navigation options like 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Progress Notes', and 'History'. The main content area has tabs for 'Introduction', 'Characteristics', and 'Goals', with a rating scale and a 'Goals' section.

7) Return to your Action Items if you have additional Plans to create and follow this guide from Step 2.

The screenshot shows the 'Plan for' page in the PeopleAdmin interface. A red arrow points to the 'Home' button in the top navigation bar. The page displays a notification 'Plan has been marked as complete.' and the 'Purpose' section, which explains the goal of the Performance Management system. Below this is the 'Definitions' section, which lists key components of the system: Performance Plan, Acknowledgements, Self Evaluation, Supervisor Evaluation, and Progress Notes. The page also includes a sidebar with navigation options and a right-hand panel with '2018 P/A Performance Evaluation' details.