



Create Review Section - Goal Planning

Using this section type, users can set goals for the next period within the performance review. The Goal Planning section is a good option to allow organizations to take advantage of the Goals functionality within the review and set up goals for the next review cycle.

Goals that are created within a Goal Planning section are automatically approved when the performance review is completed.

Best Practice: When using this section in the performance review and goal creation requires approval, it is a best practice to assign the goal planning section to the employee first to fill out their goals for the future period. Then, include the same goal planning section in a following manager review step to allow the manager to edit or remove goals that were added by the employee or add additional goals. Thus once the review is completed, both the employee and manager have reviewed the future goals and these goals are automatically approved when the performance review is completed.

Once the review is complete, the goals appear in the Goals module for the user and are automatically approved. The review must be completed before these goals appear on the module. For every step that includes this section, the step assignee can add, edit, or remove goals that were added by a previous reviewer or the user if that step assignee has the Edit section privilege for their assigned review step.

To create a performance review section, go to [Admin > Tools > Performance Management > Form Sections](#). Select **Create Review Section** and select **Goal Planning Section** from the Type drop-down or edit an existing Goal Planning section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

Review Section

Name:

Goal Planning

Type:

Please select the section type before proceeding.

Goal Planning Section

Category:

Default Category

☒ Include current goals whose period overlaps the Performance Review Period

☒ Include shared goals whose period overlaps the performance review period (Shared goals will be read only and should not exceed 100.00% if validation is also used)

☐ Include goal weight validation informing all goals should add up to 100.00% (only individual goal weight can be modified)

☐ Display validation message and prevent submission if goal weights don't add up to 100%

☒ Enforce validations outlined in the Validations section of Goal Preferences

Directions

Create default directions or create customized form section directions based on the user's assigned role. The character limit for this field is 3000 characters.

To create default directions:

Select the Default tab and enter the appropriate directions. These directions appear to all users unless you create custom directions.