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## Planning Stage: Using the 2014 ACES Form

This job aid is designed to provide instructions for completing the Planning Stage for the 2014 ACES Form. **Planning Stage begins on January 13, 2014 and must be completed by February 14, 2014.**

For additional help on entering objectives, please visit HRD's [ACES 2014 Planning Stage](#) page.

### Reporting Manager Step Actions:

- 1) Log into ACES. On the homepage of ACES, click the **ACES Inbox** link which appears in a box or use the drop-down arrow next to **Home** in the upper left corner of the screen and select the 3<sup>rd</sup> link. Once you are in your **ACES Inbox**, click on the **2014 ACES form** with your name in the title.

The first three sections **Employee Information**, **Review Information** and **Planning Instructions** are read-only sections. No action is required by you. If you do see anything inaccurate in the **Employee Information** section, please notify your Agency ACES Coordinator so the form can reflect the correct information.

- 2) The fourth section is **Manager Objectives** where you enter between 2 and 4 SMART (specific, measurable, achievable, realistic, and time-bound) objectives. If you would like to **copy objectives** onto your 2014 form from the 2013 form or if you would like to **cascade (send)** an objective to another manager, please go to the Objectives Page after saving and closing this form. Job Aids are posted at [ACES2014 Planning Stage](#).
- 3) Click the **Add a New Manager Objective** button. A pop-up window will appear. At the top of the box you will see a **Category** listed. This is a drop-down menu where you should indicate if the objective you are entering is an **Agency Operational Objective** (the default choice) or a **Secretariat/Agency Aligned Strategic Objective**. Select the appropriate category.
- 4) Next enter your objective. Assign a weight (suggested minimum weight is 5%; suggested maximum is 75%).
- 5) If you would like to enter milestones, click the **Add Milestone** button. A milestone is a key event or deliverable which is helpful to mark progress toward your objective. Enter a description and a start and end date. To add more **Milestones**, click the plus sign (+). You will now notice up and down arrows appearing next to the due date. You can reorder the milestones if you choose by using these arrows.
- 6) Click **Save Changes**; the objective now appears on your 2014 ACES form.
- 7) Repeat steps 3 through 6 to add additional **Manager Objectives**. You should have 2-4 Manager Objectives, including at least one that is a **Secretariat/Agency Aligned Strategic Objective**.

- 8) To edit a **Manager Objective**, click on the **edit objective** icon (paper and pen graphic) listed in right margin; a pop-up screen will appear where you can change the objective category or edit description of objective, weight, and optional milestones.
- 9) The next section on the form is Career Growth Objectives. Click the **Add a New Career Growth Objective** button. A pop-up window will appear.

Enter your **Career Growth Objective**. Please note this is different than the box for **Manager Objectives** since category, weight, and milestone fields are not available for **Career Growth Objectives**.

- 10) Click **Save Changes**; the objective now appears on your 2014 ACES form.
- 11) To add additional **Career Growth Objectives follow the above steps**. You should have 1-3 Career Growth Objectives.
- 12) To edit a **Career Growth Objective**, just revise the text on the screen.
- 13) The final section of the form is **Core Managerial Competencies** (read-only) which are rated at Final Review stage. Please read these behavioral statements so you know what you will be rated on during Final Review.
- 14) Once you have you have completed the required steps, you **MUST** inform your Appraising Manager that the form is now ready for his or her review. NOTE: There is no system alert or email that will to inform your Appraising Manager that you have completed your part for Planning.
- 15) Select **Save and Close** at bottom of the form so the Appraising Manager can access the form.

### **Appraising Manager Step Actions**

- 1) Read the **Manager Objectives** and **Career Growth Objectives** and edit, as necessary. You should discuss the objectives with the Reporting Manager during a Planning meeting.
- 2) Ensure that at least one **Manager Objective** is listed as a **Secretariat/Agency Aligned Strategic Objective**.
- 3) Once you accept the Objectives, click on the **Planning is Done; Send Form to Progress Review Stage** button. If the sum of the weights for Manager Objectives does not total 100%, an error message will appear and will need to adjust the percentages so the form can move to Progress Review Stage.
- 4) On the following screen click **Planning is Done; Send Form to Progress Review Stage** button.
- 5) Select **Save and Close** at bottom of the form.

### **Notes:**

- The online performance evaluation form is simultaneously in both the inbox of the Reporting Manager and Appraising Manager.

- Only one party is allowed to edit the form, at a time.
- Both the Reporting Manager and the Appraising Manager can immediately view form updates once they have been saved if the **Save and Close** button is used.
- Only the Appraising Manager can move the form from Planning Stage to Progress Review Stage.