Hello supervisors,

We have created videos to help you navigate entering goals and appraisals into Luma. You may have received some resources in the past but please utilize these videos as we have found these steps to be the most user-friendly. These videos were created from the perspective of having the Word appraisal template completed with the ability to copy and paste the information into the system.

There are a total of 8 videos, ranging from about 2 minutes to 6 minutes, reflecting the main steps of the process.

1. Creating Goals
2. Completing Goals
3. Creating an Appraisal
4. Consolidated Appraisals
5. Upline Manager Acknowledgement
6. Supervisor to Employee for Acknowledgement
7. Employee Acknowledgement
8. Supervisor Acknowledgement

Videos 1-6 & 8 can be located [here](https://vimeo.com/showcase/10898408) and can be accessed using the **password 12345.** The employee acknowledgement video can be located [here](https://vimeo.com/902073074/ba3ebfbb35?share=copy). That video is stored separately since most employees do not need access to all of the videos.

In some of the videos we had to use actual manager roles and appraisals for accurate recording purposes so you will see blocks with the term sensitive information in some of the videos. We tried to ensure that the information absolutely necessary was visible for the viewer.

Below are a few notes and tips regarding entry of the information.

**Create Goals**

* The goals being entered here are the goals for the current appraisal period (not the future goals).
* The dates for the goals (start and end) must be within the current appraisal period.
* Formatting such as bullet points is optional and not required.

**Complete Goals**

* The goal end date must be within the appraisal period.
  + Example: The review period is 11/01/2022 – 10/31/2023. The goal end date could be 10/31/2023 but can not be after or it will not properly pull into the appraisal.

**Creating Appraisal**

* The appraisal due date is determined by the agency.
* Goals can be added during the review period. The goal start date can differ from the review period start date, but the goal start and end dates must fall within the review period to be included in the appraisal appropriately.

If you have questions regarding the videos, the guidance above or the goals and performance modules please contact your HR representative.