NAVIANCE *by* **HOBSONS**

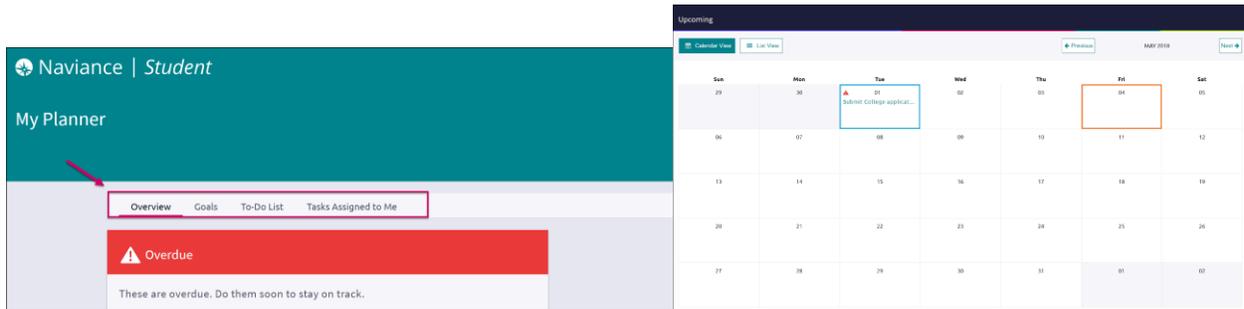# My Planner Reference Guide

Overview

Use provided tools such as goals, to-do lists and tasks in My Planner to create personalized plans of action to achieve your goals. From the My Planner overview page, you can quickly access overdue tasks, a calendar of past and upcoming events, and recently completed tasks and to-dos.

Goals

Adding a Goal

A set of goal categories will be visible when you navigate to **My Planner** > **Goals**.

- What is a **goal**? A goal is an aim or a desired result. **SMART goals** are a way of writing goals to make them more achievable.

1. Select a **goal category** and click the **+ sign** below the category to get started.

Alternatively, hit the Pink (+) button to select a goal category)

2. Fill in the **fields** to create your SMART goal.

3. Click **Add**.

4. Once you have added your goal, you can add **comments** and **next steps** to help you achieve your goal.

5. *The goal is now accessible from the Goal Category.*

6. Open the goal to **mark it as done**, **edit** the goal, or **remove** it. Not all goals can be marked done but, instead, are completed once a file is uploaded or some other criteria is met.

To-Do List

Adding to the To-Do List

Use the To-Do List to add or view action items that you need to complete.

1. Click the **pink +** (plus) button to add a To-Do.
2. Enter the information about the To-Do, use the drop-down to associate a goal or task with the To-Do, select a priority, and add an optional due date.
3. Click **Add**.

7.
8.

Viewing the To-Do List

View the To-Do List using **sorting** and **filtering** tools.

My To-Do List

To-dos are actions you need to complete.

You can relate them to a goal you make or a task that your school has assigned to you. They can also be on their own, which is a good way to keep track of work you need to do or things coming up on your calendar.

Sort by Deadline ⌄

Deadline

Related goals and tasks

Filters All General Related to Tasks Related to Goals

9. ⚠ Overdue

Tasks Assigned to Me

Overview

This section includes tasks that have been assigned to you by your school. They may be tasks that are required for graduation, so be sure to review the listed tasks.

The Tasks Assigned to Me page is broken down into four content cards. They include:

- **Tasks you Need to Work On**: Upcoming tasks that are either labeled as graduation or required tasks.

- **Tasks you've Completed**: Tasks that you have finished and marked completed.

- **Overdue**: Tasks in which the due date has already passed. These tasks require immediate attention.

- **Tasks for Future Grades**: Tasks that you do not need to worry about now, but that will be upcoming as you move to the next grade level.

Viewing Tasks

10. Click once on a task to open it and take an action such as:

- **Raise Hand**: Ask a question of the counselor or teacher that assigned the task.

- **Add a Comment**: Type and add a comment. Comments can be viewed by associated teachers and counselors, as well as parents.

- **Attach Files**: Add a file that relates to the task.

- **Create Connected To-Dos**: Create a To-Do item that will be added to your To-Do list but associated with the task.

- **Mark as Done:** Depending on the way that a task has been assigned by your school, you may have to manually mark the task as completed. This button will be visible next to Raise Hand if it is activated.
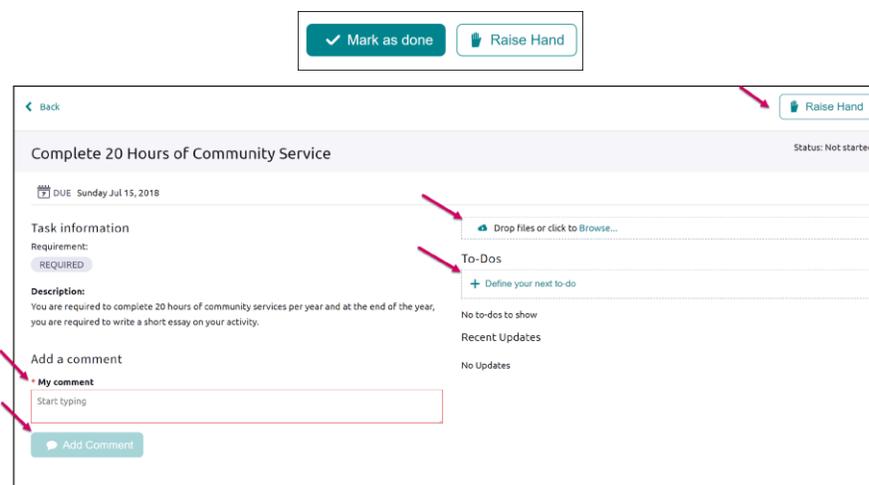
In some instances, tasks will be shared with multiple students. If that is the case, you will see a note on the page above that reads as shown here:

When there is shared activity, you will also be able to use a filter to find all, your own, or other's activity:

Filters ALL My activity Other's activity