

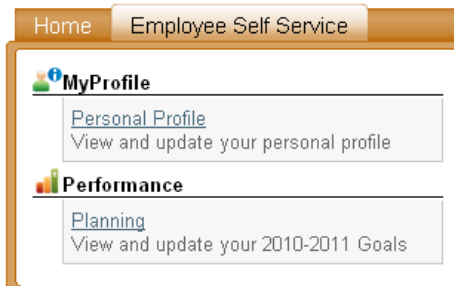
**Overview**

All classified employees are required to have at least two performance goals per evaluation period. These goals can be entered by either the manager or the employee into our online performance management system. The other party will then have to enter the system to acknowledge the goal. Goals can be entered into the system from April 1<sup>st</sup> through October 30<sup>th</sup>.

**Completing/Submitting the Planning Form**

Your **Goal Planning** form can be accessed from the Home page:

1. Select **Employee Self Service > Performance > Planning** from the main toolbar.



2. To add, edit, or acknowledge goals, click the **arrow → button** under **Actions**. **Select Edit**. This will take you to the **Planning/Monitoring** page.

| Actions | Performance Plan Name   | First Name | Last Name | Reports To         | Company Job Title          | Organizational Unit  | Date Of Hire |
|---------|-------------------------|------------|-----------|--------------------|----------------------------|----------------------|--------------|
|         | 2010-2011 Goal Planning | Nicole     | Stephens  | Sullivan, Marita J | Campus Marketing Comms Mgr | Human Resources, AVP | 9/16/1998    |

**Completing/Submitting the Planning Form, cont...**

3. Click on the **Add Goal** link to start adding goals.



4. On the **Create New Goal** page, you will need to provide the following information for each goal:
  - Goal Name
  - Description
  - Start/Due Date

Note: Goal Type is set and should remain as "Descriptive."

5. Enter the goal name and description. **Start Date** is already defaulted to 4/1/2011. Enter the **Due Date** for the goal. After you have completed these required fields, click **Continue**.

Please do not select the option to make the goal private. If you do so, you will not be able to submit it to your manager.

6. When you click **Continue**, you will be taken back to the **Planning and Monitoring** page. Here, you can review the goal you've created before you submit it to your manager. If you need to make changes before you submit the goal, you can do so directly on this page.

7. You now have two options:
  - **Save:** Press the **Save** link at the bottom of the page to retain any changes you made to the goal.
  - **Save and Submit:** Press the **Save and Submit** link at the bottom of the page to save and send your goal(s) to your manager for approval.

**Acknowledging Goals Submitted by your Manager**

1. Follow steps 1-2 in the previous section and you will be taken to your **Planning/Monitoring** page.
2. You now have two options:

- **Acknowledge:** To acknowledge a goal submitted by your manager, click on the **Acknowledge** link for that goal.
- **Edit Goal:** If you need to edit the goal before acknowledging it, you can make changes directly on the page. You must then save your changes by clicking the **Save** link at the bottom of the Planning/Monitoring page.

After saving, please note that if you've edited the goal, the "Acknowledge" link will change to "Submit" so that your manager can view and approve any changes you've made.

Click **Submit** to send the edited goal to your manager for approval.

After goals are acknowledged, they enter the monitoring phase.

**Monitoring Goals/Tasks**

Once goals are approved, you can do the following:

- **Update Progress:** You may choose a percentage of completion for the goal
- **Amend** – You may modify your goal.
- **Terminate** – You may delete your goal.
- **Add Notes** – You may add and update notes regarding this goal. You may reference these notes during your review.

