

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

1. Select **My Team > Performance > Goals Planning** from the main toolbar.



2. You will be brought to the **Performance Planning Summary** page which will display a listing of your reports.
3. To add or edit goals for an employee or to acknowledge goals submitted by an employee, select the **Actions** arrow → **Edit** (see below).

Actions	Last Name	First Name	Employee ID	Job Title	Performance Planner	Job F
	Mark		43A	General Manager	Jefferson, Andrea A	Professional/Ma
	Frank		44A	Admin. Asst.	Jefferson, Andrea A	Support
	Baker	Ross	33A	Consultant	Jefferson, Andrea A	Support
	Bauers	Nick	45A	Sales Representativ	Jefferson, Andrea A	Professional/Ma
	Brockhagen	Ralph	4A	Accountant 2	Jefferson, Andrea A	Professional/Ma
	Flanders	Nicholas	37A	Accountant 2	Jefferson, Andrea A	Professional/Ma

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

4. Click on the "Add Goal" link to start adding goals.



5. 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."

6. 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.

7. On the **Create New Goal – Permissions** page, you may limit the employee's editing capabilities by deselecting the checkboxes in the **Employee Permissions** section. Under **Duplicate Goals**, you can assign the goal to additional employees by checking the box "Copy this goal for additional employees?" and clicking **Continue**.
  - Check the box next to the names of the employees that you also want to receive the goal and then click **Continue**.

8. 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 the employee. If you need to make changes before you submit the goal, you can do so directly on this form. **You must press Save at the bottom of the page to retain your changes.**

9. Finally, you must press **Save and Activate Performance Note** in order for the employee to receive and acknowledge the goal(s).
10. If you copied the goal you created to additional employees, you must go to those employees' **Planning and Monitoring** pages(steps 1-3) to submit the goal to them as well.

**Acknowledging Goals Submitted by an Employee**

1. Follow steps 1-2 in the previous section and begin to acknowledge a goal by selecting an employee (**Actions** arrow → **Edit**).
2. You now have two options:
  - a. **Acknowledge:** To acknowledge a goal submitted by your employee, click on the **Acknowledge** link for that goal.
  - b. **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 employee can view and approve any changes you've made.

Click **Submit** to send the edited goal to your employee for acknowledgement.

**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.

