Establishing Goals (for Employees)

What Are Employee Goals?
The Goal Plans provide a collaborative area for you and your manager to create and track progress on the goals that you plan to focus on during the review period. In this guide, learn how to create and edit goals in your Goal Plan, as well as communicate with your manager regarding your progress.

Getting Started
- Click Home in the upper-left corner of the screen.
- Click Goals from the drop-down menu.

There are two goal plans for each performance cycle. Employees will enter goals and major responsibilities on the Goal Plan and development goals on the Professional Development Plan. You can switch between the goal plans by selecting from the Goal Plan dropdown menu. This guide will focus on the Goal Plan, but the Professional Development Plan works the same way.

Adding Goals
A goal describes outcomes you hope to achieve during the upcoming review period. To add a new goal, click Add Goal in the upper-right corner of the screen, then select one of the following:
- Click Create a New Goal to add a custom goal or select a predefined goal from the Goals Library.
- Click Goal Wizard to step through the process of creating a SMART goal. A new window will open to guide you.
- You can also copy goals from the prior year’s goal plan, if you have used the goal plans in myPerformance in the previous cycle. Click Copy From Other Goal Plan and select the year and plan you wish to copy. Select the goal(s) you want to copy by checking the box(es) next to the goal(s); once goals are transferred, you can update or edit them.

Please note: you must copy your goals before the prior year’s goal plan closes and the plan is archived, approximately three months after the new cycle begins. If you need to copy goals after the previous year’s goal plan has been archived, please contact your HR Rep.

Goals may also be “cascaded” from your manager, which means you will receive goals directly from his or her plan. These goals can be edited once they are on your Goal Plan to reflect how you will support or contribute to the goal.
Add Goals

For the Create a New Goal option, select Add Goal to create a custom goal. A new window will open; complete the sections as described below:

- **Visibility:** You may choose for your goal to be public or private (default). Be aware that a private goal is not a personal goal; it is still visible to your manager(s). If a goal is public, then it is visible to any employee.

- **Category:** Assign the goal to a category – either Goals or Major Responsibilities. Goals are the priority outcomes that you want to accomplish during the upcoming review period and should be aligned to your department’s goals. Major Responsibilities are ongoing job requirements that are included in your job description. If these duties were not performed, it would severely impact the nature of the job.

- **Goal Name:** Type in the name of the goal.

- **Goal Description:** Type in the goal description and include SMART components (Specific, Measureable, Attainable, Relevant, and Timely or Time-bound.)

- **Weight:** Enter a percent to indicate the goal’s relative importance to other objectives on the Goal Plan. All of your goal weights combined should add up to 100%. The Total Weight is automatically calculated, so you can see when they add up to 100% on the goal plan.

- **Start/Due Date:** Enter the dates that the goal is to start and be completed by.

- **Tasks:** Use this to add sub-tasks to help you track progress toward the goal.

- **Status:** Choose from the dropdown options: Not Selected (default), In Progress, Complete, Paused, or Cancelled, to indicate the status of your goals.

Please note: the Goal Name field is required (indicated by the red asterisk). Click Save Changes to save the goal and return to the Goal Plan.

Commenting on Goals

Employees and managers have the ability to engage in informal back-and-forth commenting directly on the Goal Plan. Enter notes in the “Comments” field and click “Post.” Once a comment is posted, it is immediately visible to the other party. Managers and employees can edit and delete their comments.

Please note: goals from the goal plans automatically transfer to performance forms when available, however, any comments that are entered on the Goal Plan do not appear on the Performance Form. Formal comments should be entered on the Midyear and Annual Review Performance Forms.
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Add Library Goal

The **Goal Library** assists with writing goals by providing templates with suggested content and metrics. To use the Goal Library, follow these steps:

- Click **Create a New Goal**.
- Click **Add Library Goal**.
- Use the folders to browse functional job areas and review the sample goals provided in the goal library.
- Click a checkbox and click **Add Selected** to select a goal.
- The Goal Library pre-populates the Add Goal window with suggested content, which can be edited as needed.

**Please note:** goals from the Goal Library are very narrow in focus and task oriented. They can be a good starting point for identifying specific tasks that fall under a larger goal category (i.e. Administrative Support, Customer Service, or Financial Support.) Most employees will likely need to combine several of these tasks under one goal title, to more accurately reflect the scope of work they do in relation to a goal category.
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Goal Wizard

Use the Goal Wizard to help you write SMART goals. From the Add Goal drop-down menu in the top-right corner, click Goal Wizard to step through this process.

- Select the Category for the goal (Goals or Major Responsibilities).
- Type the name of your goal and then click Next.
- Enter how you will measure this goal, then click Next.
- Is this goal attainable? Select the Yes or No checkbox. If no, click Back to modify the goal. Click Next.
- Enter the dates that the goal is to start and be completed by, and then click Next.
- Select Add More Details to add additional information including the goal weight (the goal’s relative importance to other objectives on the Goal Plan) and to add tasks and/or Status. When you are finished, select Save & Close.

Copying Goals

If you have used myPerformance for more than one cycle, you can copy goals from the prior year’s goal plan. This is especially helpful for copying your Major Responsibilities goals, which typically do not change from year to year. From the Add Goal dropdown menu in the top right corner, click Copy From Other Goal Plan.

- Select the Goal Plan that contains the goals you want to copy.
- Click Next.
- Select the goal(s) by clicking in the box next to the goal name.
- Click Copy.
- The goal can be edited once it has been copied.
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Edit Goals
After a goal has been added to your Goal Plan, it may be edited if you need to make changes.

- Click **Edit** next to the goal title on the Goal Plan to edit the goal. The Edit Goal window will appear and you can change any aspect of the goal in the same way that you entered the goal originally.
- Click **Save Changes** to save the goal and return to the Goal Plan.

Display Options
Select **Display Options** in the upper-right corner to change the information displayed on your Goal Plan by checking or unchecking boxes and clicking the **Update** button.

Goal Actions
- Select the action icon to display the **Actions** drop-down menu.
- To link a goal with another employee’s goal, select **Link to another Employee’s goal**, and then select the employee to whom you want to link the goal. Those two employees will then share the goal and can track progress together.
- Other functions available from the **Actions** menu include:
  - View goal detail
  - Goals Alignment Spotlight
  - Delete goal
  - Move goals up or down in the form
  - Indent or outdent goal
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Employee Hierarchy

The **Employee Hierarchy** is used to view your direct report’s goals or other employees’ public goals, both up and down your hierarchy, to ensure goal alignment within the team and organization.

Click the dropdown arrow next to your name, to access the search box and hierarchy. Type a name in the box or click on a name in the hierarchy, to view that employee’s public goals. **Please note:** goals default to “private” status. If you prefer to create “public” goals, you may do so with your manager’s approval. Your manager will be able to view and manage your private goals.

Completing Your Goal Plan

*myPerformance* saves your goals as you go, so you do not need to click a save button to complete the form.