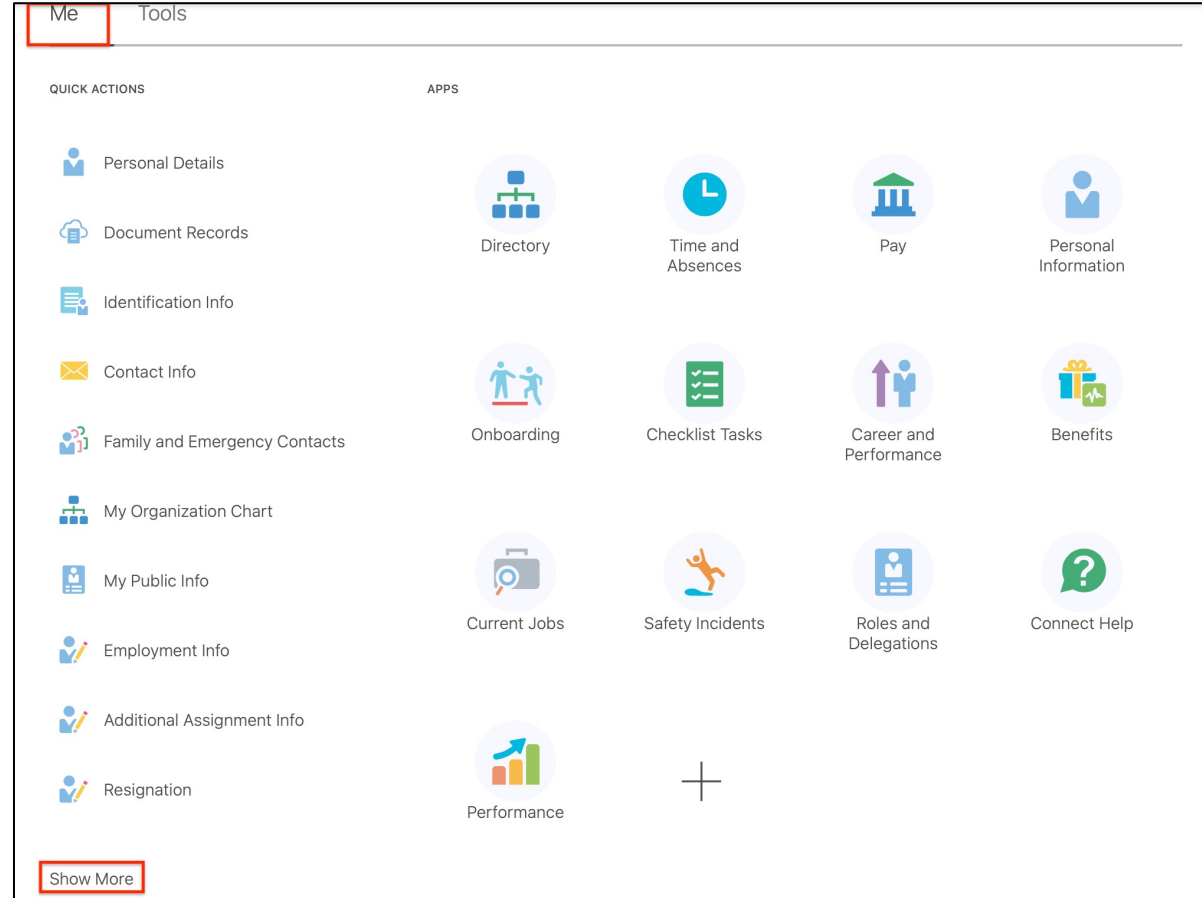


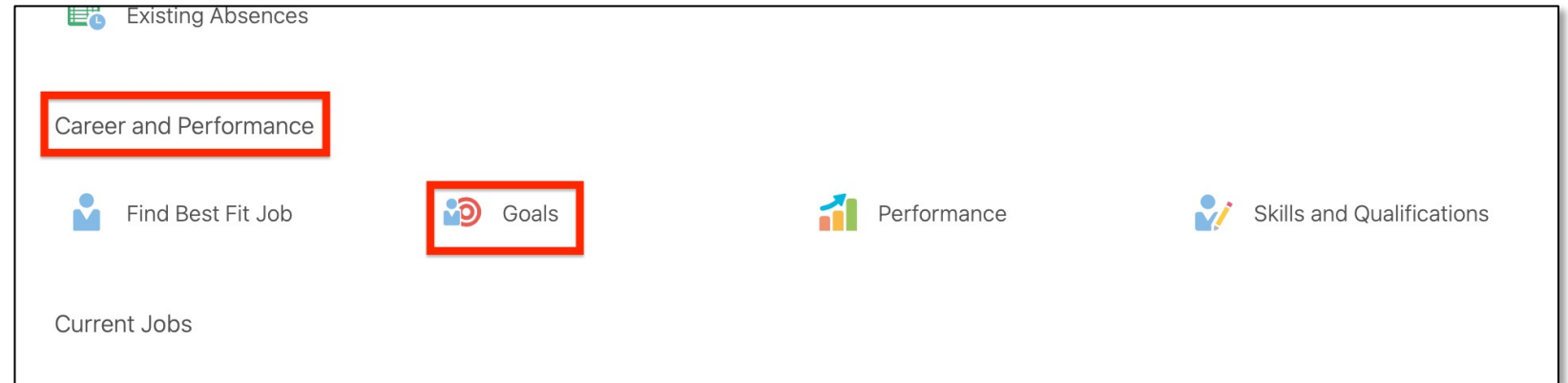
Employee Manages a Goal

Managing goals can be done anytime throughout the year, including during the evaluation period

1. Select **Me** to display your Employee functions.
2. Click on **Show More** below the Quick Links.



3. Scroll down until you see **Career and Performance**, then click **Goals**.



4. On the **Goal** page, ensure that **Annual Review Period** is selected and select the name of the Goal that needs to be updated or acted upon.

Review Period

Annual Review Period

Goal Plan

Performance Goals

Goals Shared with Me

Employee Goal Plan

Actions

☐

ABA Certification

Status

In progress

Sort By

Display Sequence

+

Add

5. On the selected goal page, click **Edit**.
6. Update the goal and make changes as necessary then click **Save**.

Basic Info

Edit

Goal Name

Test Goal 1

Description

Goal Description

Status

Not started

Start Date

1/1/21

Target Completion Date

1/1/22

Success Criteria

Criteria used to assess

Measurement



There's

Basic Info

Save

Cancel

*Goal Name

Test Goal 1

Description

Goal Description

*Start Date

1/1/21

Target Completion Date

1/1/22

Category

Skill

Status

Not started

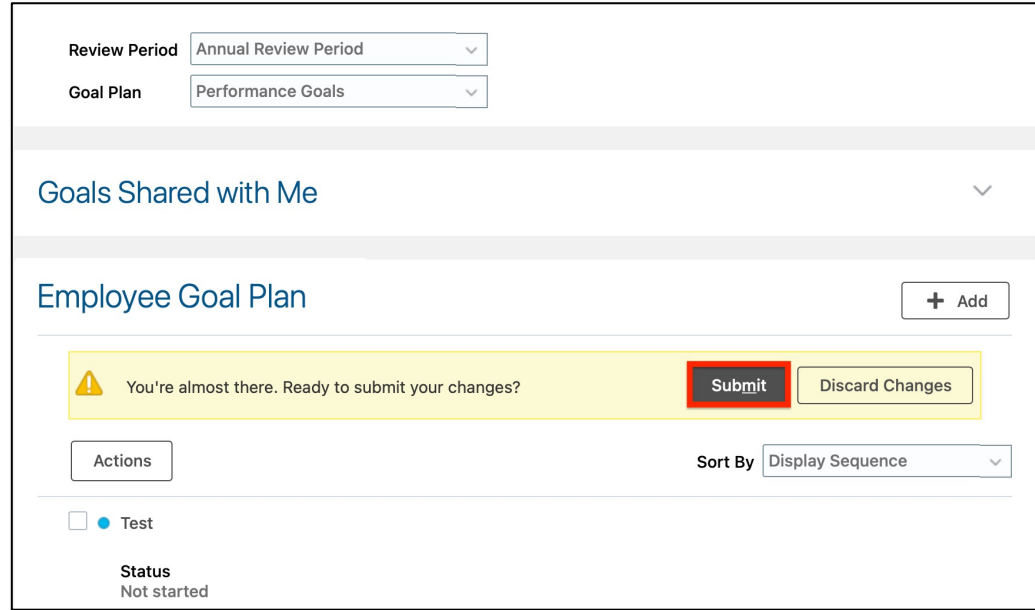
Not started

In progress

Completed

Criteria used to assess

7. On the Goals page there will be a submittal prompt, click the **Submit** button.



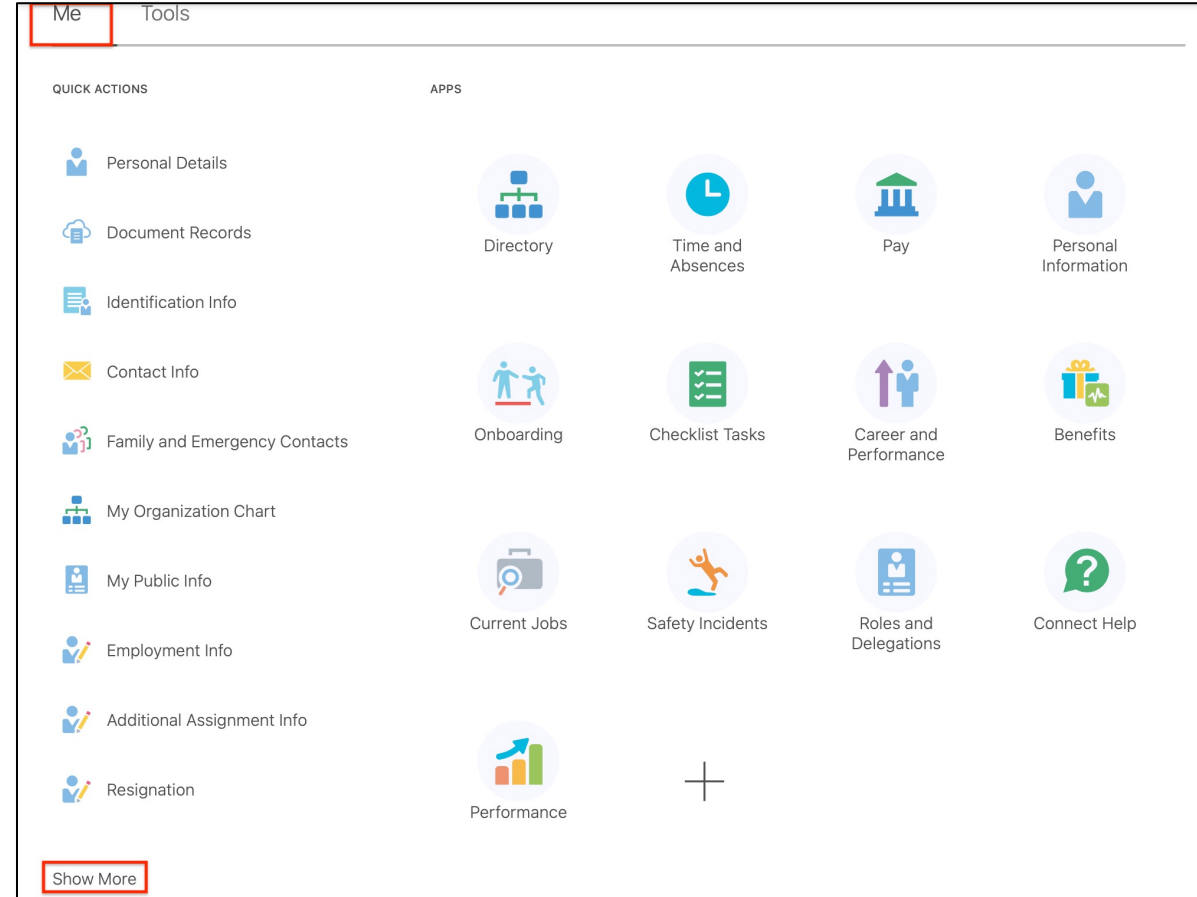
8. On the next page, enter any **Comments**, **Attachments**, and click **Submit**.

Note: Upon submittal, your manager will receive a notification to review and approve the updated goal.

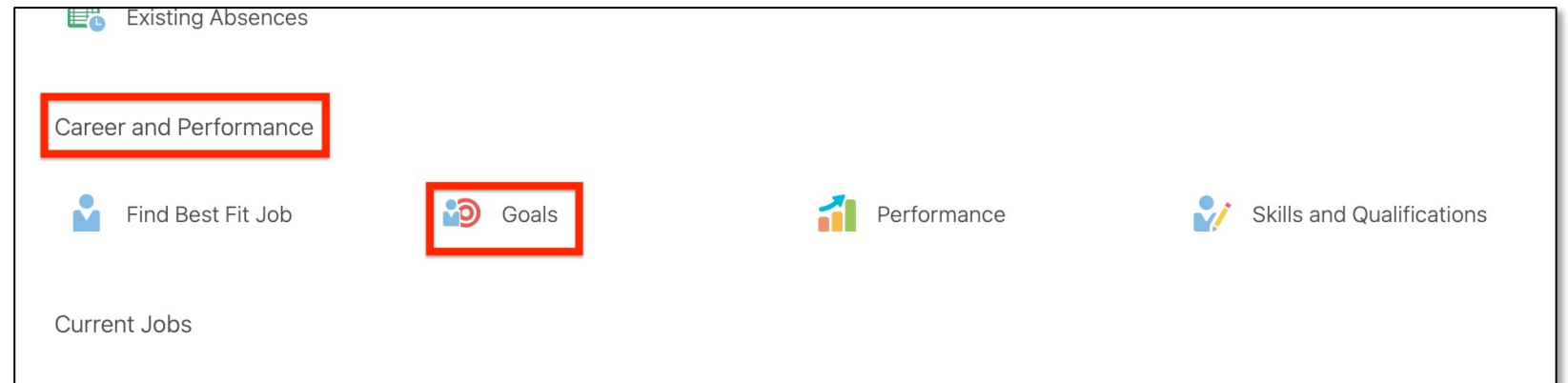


**Employee takes action on
performance goals**

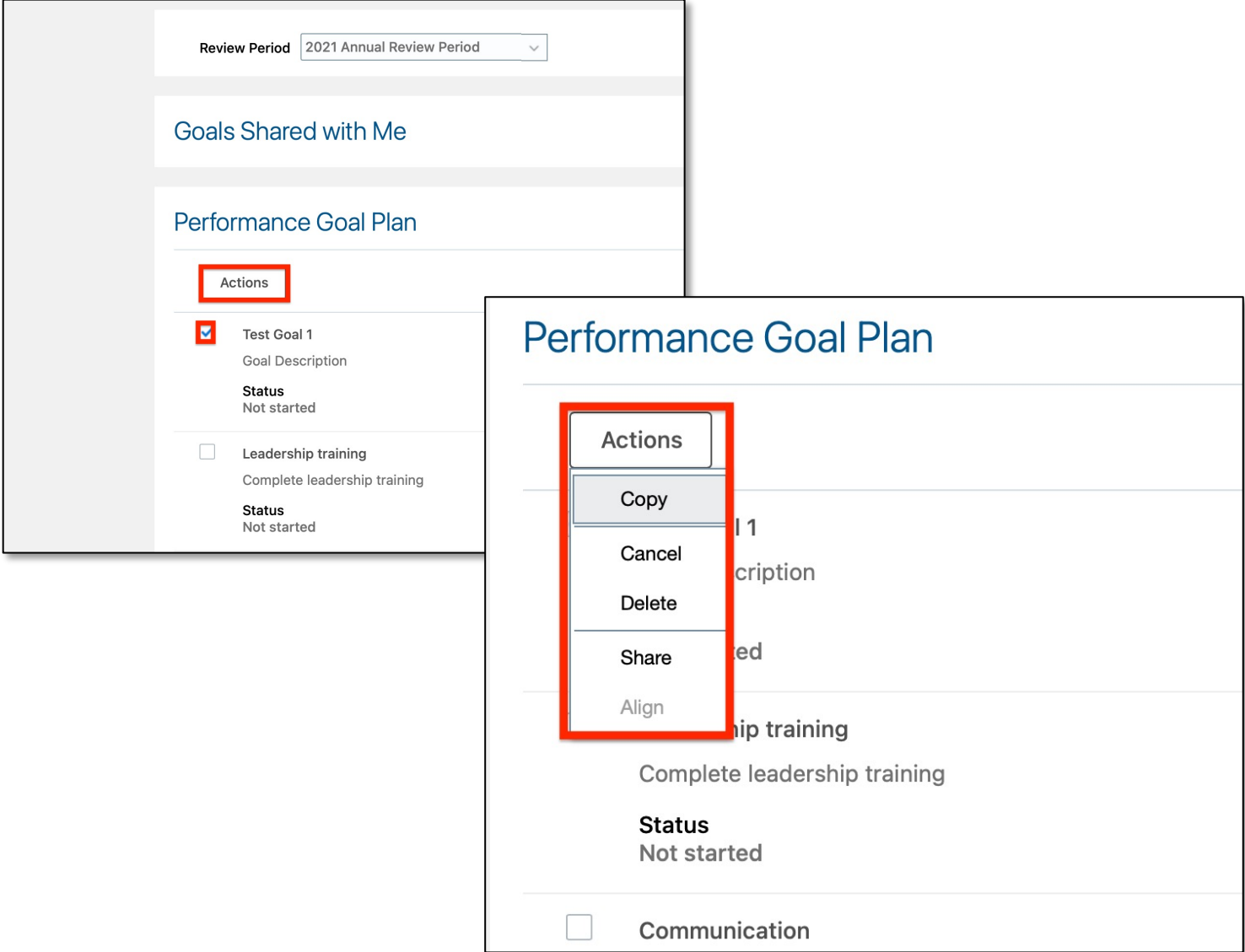
1. Select **Me** to display your Employee functions.
2. Click on **Show More** below the Quick Links.



3. Scroll down until you see Career and Performance, then click **Goals**.



4. You can take actions on the Goal by checking the checkbox of the goal that will be acted upon.
5. Click the **Actions** button.
6. Select the Action (**Copy**, **Cancel**, **Delete**, **Share**) you'd like to take on the Goal.
7. Complete the Action and click **Save and Close** before returning to the **Goal** page.

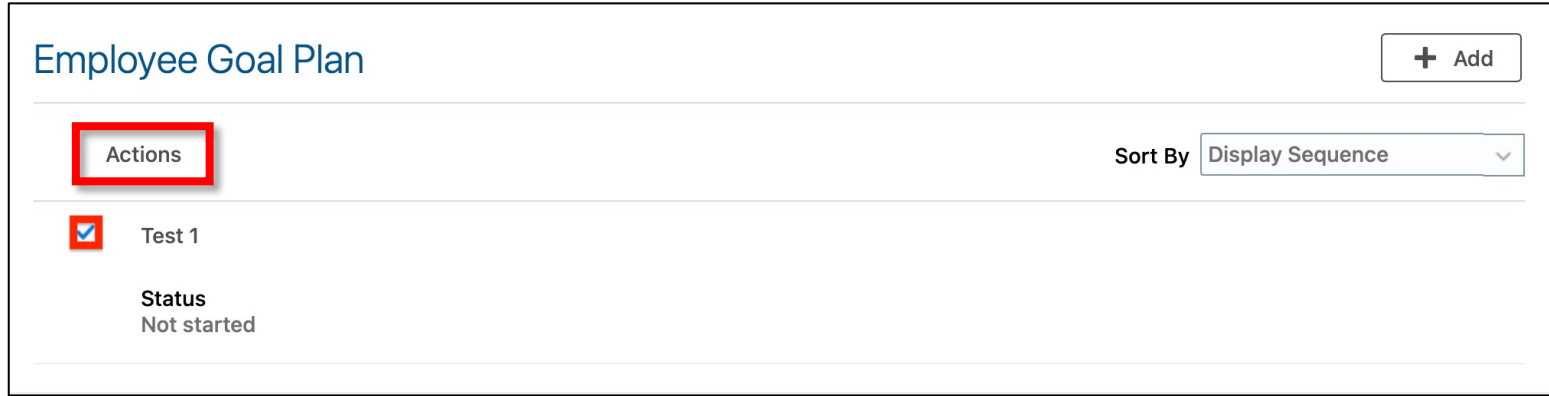


The screenshot displays the 'Performance Goal Plan' interface. At the top, there is a 'Review Period' dropdown menu set to '2021 Annual Review Period'. Below this, the section 'Goals Shared with Me' is visible. The main section, 'Performance Goal Plan', contains a table of goals. The first goal, 'Test Goal 1', is selected with a checkbox. Its status is 'Not started'. An 'Actions' button is highlighted with a red box. A dropdown menu is open, showing options: 'Copy', 'Cancel', 'Delete', 'Share', and 'Align'. The second goal, 'Leadership training', is also visible with a status of 'Not started'.

Employee Copies a Goal

1. Check the **box** next to the Goal.
2. Click the **Actions** button.
3. Select **Copy**.
4. On the next page, under **Copy To** click on the **Goal Plan** field, and select **Employee Goal Plan**.
5. Click **Save and Close**.

Note: This will copy the goal into the goal plan to create another version of the goal.



Employee Goal Plan

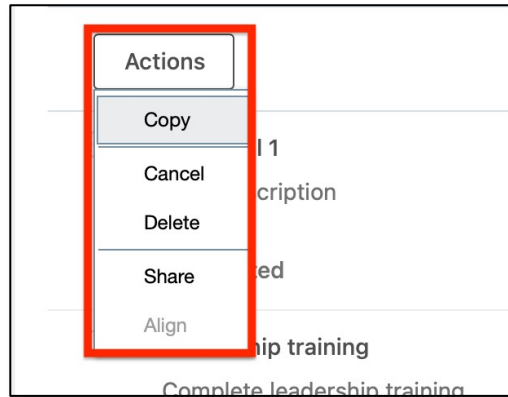
+ Add

Actions

Sort By Display Sequence

☒ Test 1

Status
Not started



Actions

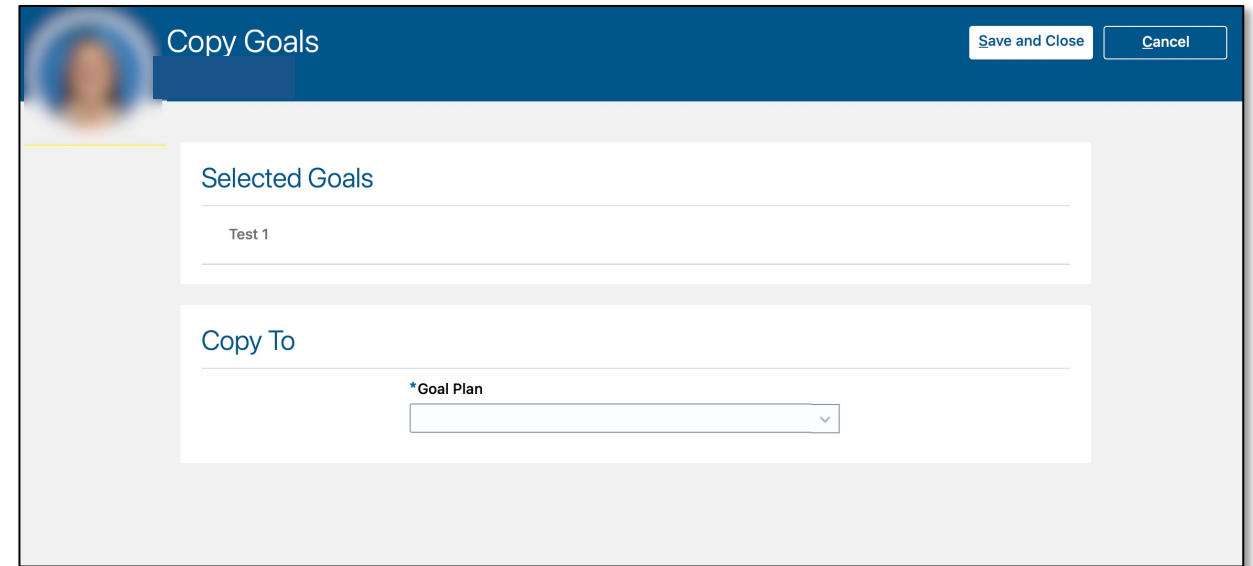
Copy

Cancel

Delete

Share

Align



Copy Goals

Save and Close Cancel

Selected Goals

Test 1

Copy To

*Goal Plan

Employee Cancels a Goal

1. Check the **box** next to the Goal.
2. Click the **Actions** button.
3. Select **Cancel**.
4. The page will refresh, and there will be a submittal prompt, click **Submit**.
5. Click **Save and Close**.

Note: Canceling a goal will change the goal status to **Canceled** and stop it from being an active goal in your goal plan. After a goal is canceled, it can only be deleted. No other action can be performed.

Employee Goal Plan + Add

Actions Sort By Display Sequence

☒ Test 1

Status
Not started

Actions

Copy

Cancel

Delete

Share

Align

Employee Goal Plan + Add

 You're almost there. Ready to submit your changes? **Submit** Discard Changes

Actions Sort By Display Sequence

☐ ● Test 1

Status
Canceled

Employee Deletes a Goal

1. Click the **box** next to the goal.
2. Click the **Actions** button.
3. Select **Delete**.
4. A prompt will ask if you want to continue, click **Yes**.
5. The page will refresh, and there will be a submission prompt, click **Submit**.
6. Click **Save and Close**.

Note: Deleting a goal will completely remove it from your goal plan. Once a goal is deleted, it will be erased from the system.

Employee Goal Plan

+ Add

Actions

Sort By Display Sequence

☒	Test 1
	Status Not started

Actions

Copy

Cancel

Delete

Share

Align



Warning

The selected goals will be deleted. Do you want to continue?
(HRG-3120357)

Yes

No

Employee Shares a Goal

1. Check the **box** next to the Goal.
2. Click the **Actions** button.
3. Click **Share**.
4. On the **Share Goals** page, under **Share Goals With**, check the box next to **Add Worker**, and in the field begin typing the name in the search field *before* selecting from the list of choices.
5. Click **Save and Close**.

Note: This will share the goal with the other employee who can then add it to their own goal plan.

Employee Goal Plan + Add

Actions Sort By Display Sequence

☒ Test 1

Status
Not started

Actions

Copy

Cancel

Delete

Share

Align

Share Goals Save and Close Cancel

Selected Goals

Test 1

☒ Share tasks

Share Goals With

☐ Add Worker Select a value

 There's nothing here so far.

Note: If a goal is shared with another, the employee will be able to view goals that were shared with them on their **Goal Plan** page after expanding the **Goals Shared with Me** section.

6. To add a shared goal, check the box next to the Goal name and select **Add as My Goal**.

Note: This will add the shared goal to your goal plan.

Review Period
Annual Review Period

Goal Plan
Employee Goal Plan

Goals Shared with Me

Add as My Goal

Sort By
Shared By - A to Z

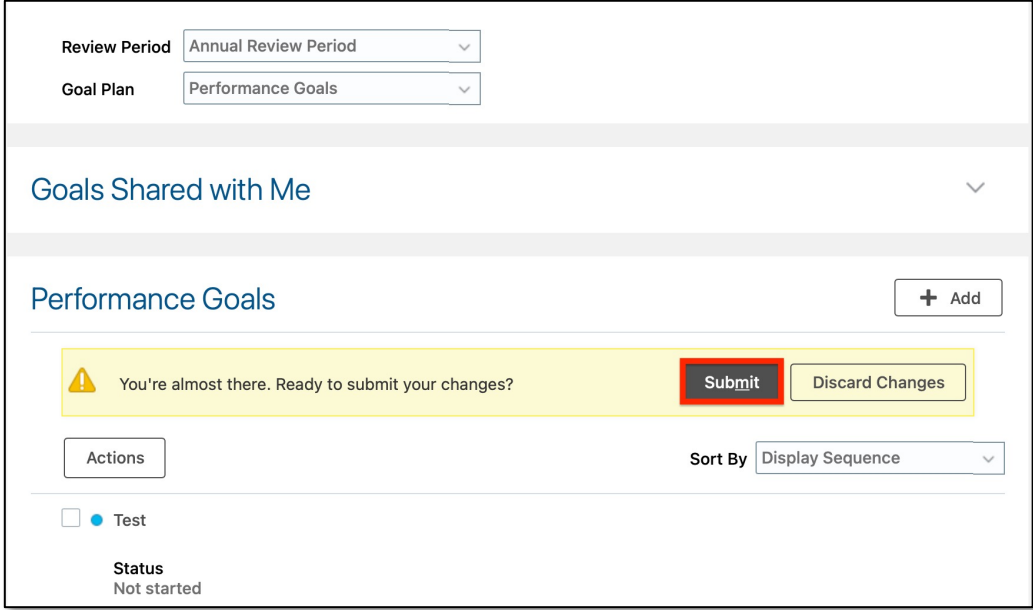
Colleague Goals

☒ 	Test 1 Shared By	Shared Date 12/20/21	X
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Employee Goal Plan

+ Add

7. After managing and updating your goals, click the **Submit** button.



8. On the next page, enter any **Comments**, **Attachments**, and click **Submit**.

Note: Upon submittal, your manager will receive a notification to review and approve the updated goal.

