

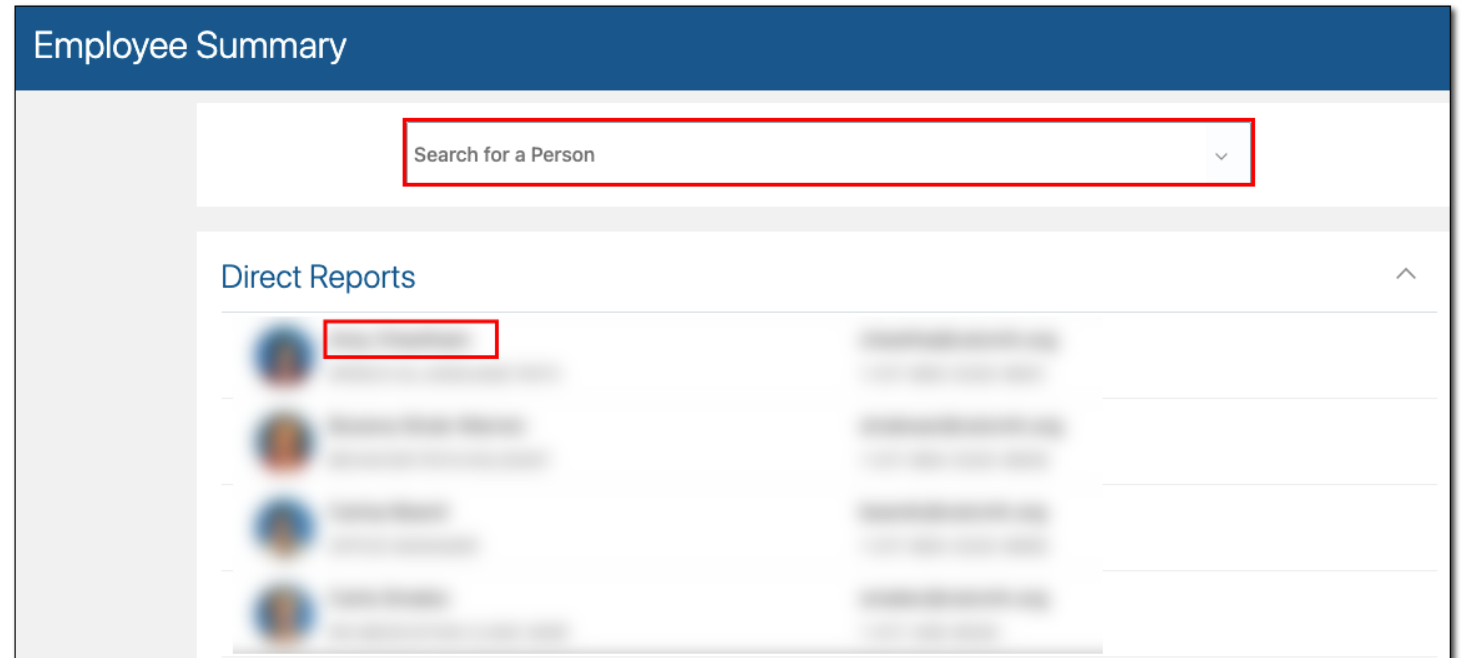
Manager Creates and Assigns a Goal

Creating and assigning goals to employees can be done anytime throughout the year, as well as, during the evaluation period.

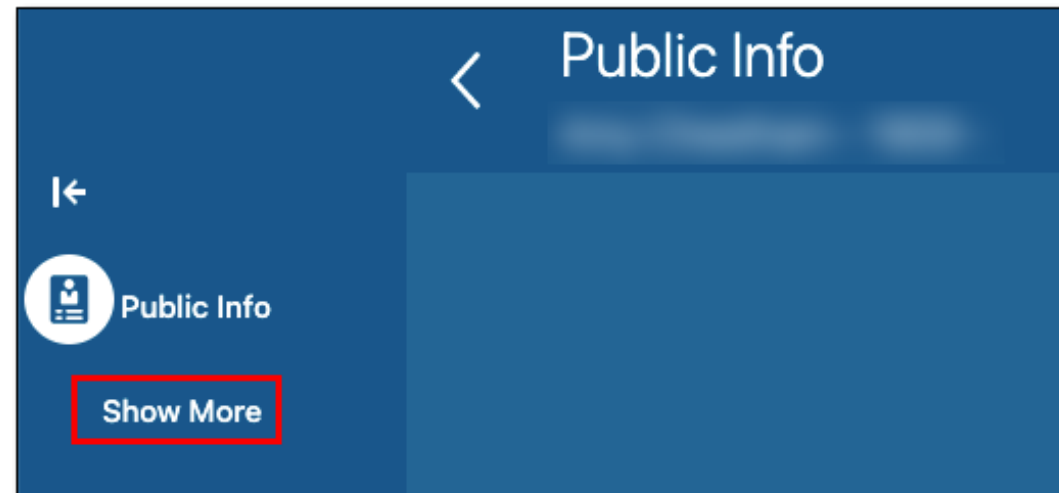
1. Select **My Team** to display your Manager functions.
2. Click **Employee Summary** from the Quick Links.

The screenshot displays the Connect Manager interface. At the top, there is a navigation bar with the following items: 'Me', 'My Team' (highlighted with a red box), 'My Client Groups', 'Benefits Administration', and 'Labor Administration'. Below the navigation bar, the interface is divided into two main sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section contains a list of links: 'Seniority Dates', 'Employee Summary' (highlighted with a red box), 'Promote', 'Employment Info', 'Document Records', 'Termination', 'Personal Details', and 'Identification Info'. The 'APPS' section contains a grid of application icons: 'My Team', 'Onboarding', 'Hiring', 'Goals', 'Career and Performance', and 'Workforce Compensation'. A plus sign icon is located at the bottom of the 'APPS' grid.

3. On the **Employee Summary** page, search for and/or select the name of the Direct Report whose goal you are assigning.



4. On the **Employee's Public Info** page, click **Show More**.



5. Click the **Goals** link.
6. On the **Goals** page, ensure the current **Review Period** is selected.
7. Click the **Add** button.

The screenshot shows a user interface for managing goals. On the left is a dark blue navigation sidebar with icons and labels: 'Public Info', 'Goals' (highlighted with a red box), 'Skills and Qualifications', 'Career Development', and 'Performance'. The main content area has a top header with a back arrow, a user profile picture, and the title 'Goals'. Below the header, there are two dropdown menus: 'Review Period' (set to 'Annual Review Period', highlighted with a red box) and 'Goal Plan' (set to 'Employee Goals'). The main section is titled 'Employee Goals' and features a '+ Add' button (highlighted with a red box) and a 'Sort By' dropdown menu set to 'Display Sequence'. Below this, there is a list of goals, with the first one being 'Performance Goal 1' (checkbox is unchecked).

- On the **Add Goal** page, create a new goal by entering the required and optional information (**Goal Name, Description, Start Date, Target Completion Date, Category, Status, Success Criteria**).

Note: Library Goals were not entered at the time this job aid was created.

- When finished, click **Save and Close**.

Add Goal

Save and Close
Cancel

Basic Info

Library Goal
Select a value ▼

***Goal Name**
Obtain CPR Certification

Allow worker to update key attributes

Description

Obtain CPR certification by the end of the Q2

***Start Date**
1/1/22 📅

Target Completion Date
12/1/31 📅

Category
Skill ▼

Status
Not started ▼

Success Criteria

Font ▼ 2 ▼ **B** *I* U ☰ ☰ ☰ 🔒 ✂

↶ ↷ 📌

Manager Manages Employee Goals

10. The Manager can take actions on the Goal by checking the box of the goal that will be used and Clicking **Actions**.

11. Select the Action (**Copy**, **Cancel**, **Delete**) you'd like to take on the Goal.

Performance Goal Plan + Add

Sort By Display Sequence ▾

Actions	Copy Cancel Delete Align	Test Goal 1	Goal Description	Status
		<input type="checkbox"/>		

Performance Goal Plan

12. To copy, check the box next to the Goal name and select **Copy**.

13. On the next page, under **Copy To**, click on the **Goal Plan** field, and select **Employee Goal Plan**.

14. 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

<input checked="" type="checkbox"/>	Test 1
	Status Not started

Copy Goals Save and Close Cancel

Selected Goals

Test 1

Copy To

*Goal Plan

Actions

Copy

Cancel

Delete

Align

15. To cancel, check the box next to the Goal name and select **Cancel**.

Note: Canceling a goal will change the goal status to cancel 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.

The screenshot displays the 'Employee Goal Plan' interface. At the top, there are two dropdown menus: 'Review Period' set to 'Annual Review Period' and 'Goal Plan' set to 'Employee Goal Plan'. Below these is the title 'Employee Goal Plan' and an '+ Add' button. An 'Actions' button is on the left, and a 'Sort By' dropdown is set to 'Display Sequence'. A table lists goals, with the first one being 'Copy - test 2 test'. This goal has an unchecked checkbox to its left and its status is 'Canceled'. A context menu is open over the goal, with the 'Cancel' option highlighted in red. Other options in the menu include 'Copy', 'Delete', and 'Align'.

Actions	Sort By
<input type="checkbox"/>	Display Sequence
Copy - test 2 test Status Canceled	

- Actions
- Copy
- Cancel
- Delete
- Align

16. To delete a goal, check the box next to the Goal name and select **Delete**.


17. A prompt will ask if you want to continue, select **Yes**.

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

<input checked="" type="checkbox"/>	Test 1
Status	Not started


Warning

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

Yes No

Actions

Copy

Cancel

Delete

Align