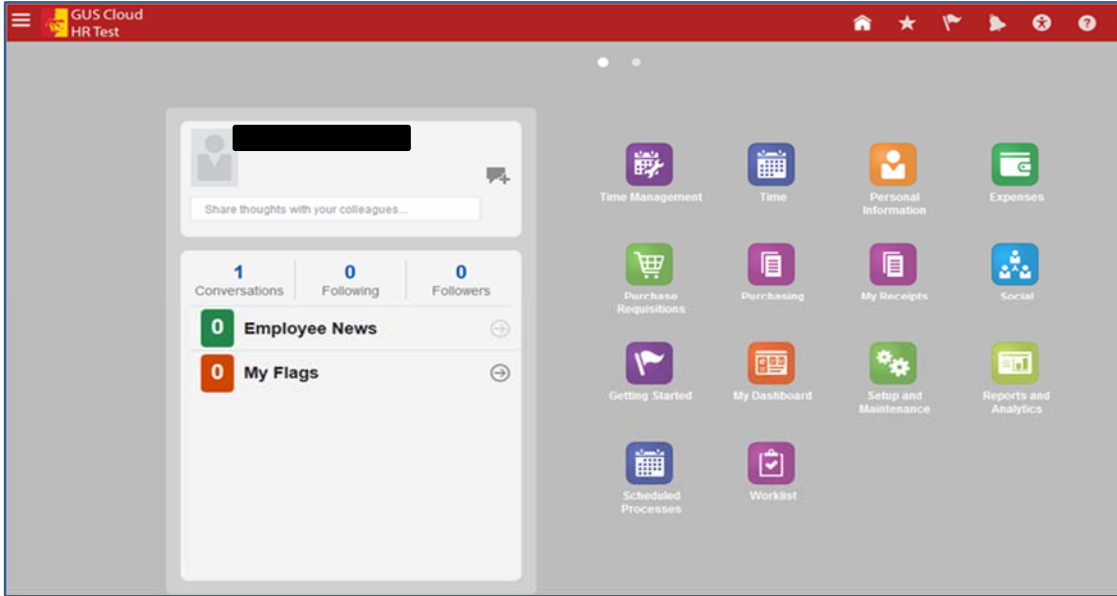# Job Aid

Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals

This Job Aid walks employees through the process of creating goals for line manager approval for the Goals and Performance Evaluation Process.

Audience: USS Employees with benefits that are required to have an annual or probationary performance evaluation.
Unclassified Administrative & Professional Employees with benefits in non-instructional positions that are required to have an annual performance evaluation.

NOTE: Faculty do not use this process

HRS Web
Resources: See Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees for an overview of the performance evaluation process and information on setting goals and types of goals.

Step	Action
1.	Logon to GUS Cloud.
2.	On the GUS Cloud springboard, select the Navigator icon.

Job Aid

Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals

GUScloud
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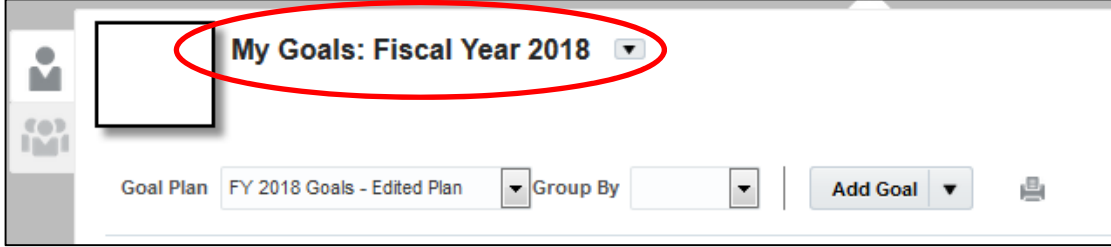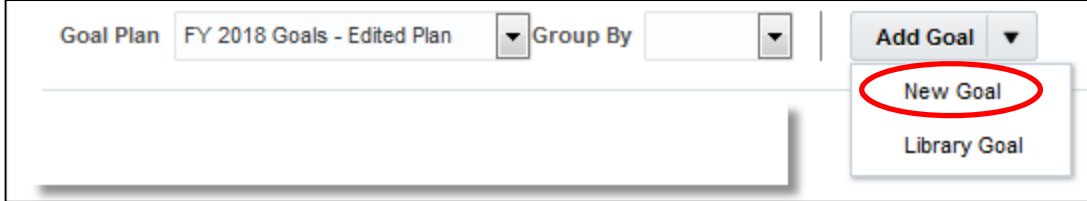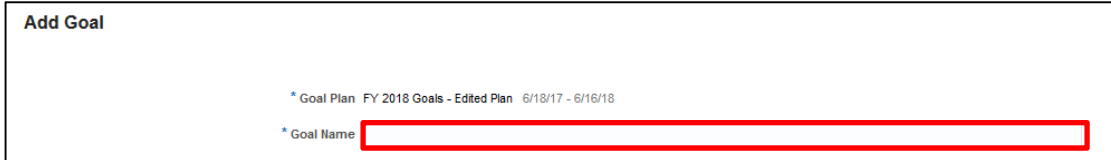| 3.	Select "Goals" under "About Me."
	Navigator
	Product Management **My Team** **My Dashboard**
	💡 Ideas My Team **Tools**
	Payables Team Talent Set Preferences
	📄 Invoices Goals Download Desktop Integration ...
	Performance
	General Accounting Talent Review **Worklist**
	General Accounting Dashboard
	Journals **About Me**
	Period Close Career Development
	Career Planning
	Financial Reporting Center *(Goals)*
	Performance
	PSU Resources Skills and Qualifications
	PSU Pay Periods and Pay Check... Personal Information
	GUS HR Training Resources Time
	GUS Finance & Procurement Tra... Expenses
	My Account
	Payroll
	Accounting Distribution **Directory**
	Directory
	Social
	Getting Started
4.	Your "My Goals" page will open. If more than one review period is available, you will need to select the appropriate review period from the drop down.
	My Goals: Fiscal Year 2018 ▾
	2018 Feb Probationary Review
	Fiscal Year 2018
	Goal Plan FY 2018 Goals - Edited Plan ▾ Group By ▾ Add Goal ▾ 🖶

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	My Goals: Fiscal Year 2018 ▼ Goal Plan FY 2018 Goals - Edited Plan ▼ Group By ▼	**Add Goal** ▼
5.	From the "Add Goal" drop down, select "New Goal" Goal Plan FY 2018 Goals - Edited Plan ▼ Group By ▼ **Add Goal** ▼ New Goal Library Goal	
6.	a. Enter Goal Name – this will be the goal name displayed on your "My Goals" page. Example: *"Develop and implement procedures to manage the student employee appointment process."* **Add Goal** * Goal Plan FY 2018 Goals - Edited Plan 6/18/17 - 6/16/18 * Goal Name b. Enter Goal Details: **Goal Details** * Start Date 6/18/17 Target Completion Date 6/16/18 Actual Completion Date Category Level ☐ Private Completion Percentage 0 Status Not started Priority Medium Source Worker	

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Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals

1. Start Date – will be populated with first day of review period but can be changed

2. Target Completion Date – will be populated with last day of review period but can be changed

   Goal Details

* Start Date	6/18/17
Target Completion Date	6/16/18

3. Category – select from drop down – this is optional – click <u>here</u> for additional information regarding types of goals
   i. Financial
   ii. Developmental Goal
   iii. Managerial Goal
   iv. Operational Task Goal
   v. Performance Improvement Goal
   vi. Project Goal

   Category

   Level: Financial
   Developmental Goal
   Description: Managerial Goal
   Operational/Task Goal
   Performance Improvement Goal
   Project Goal

4. Level – leave blank – not used at this time

5. Completion Percentage – select from drop down

   i. 0
   ii. 25
   iii. 50
   iv. 75
   v. 100

   Completion Percentage: 0
   Status
   0
   25
   50
   75
   Priority: 100

6. Status – select from drop down

   i. Not started
   ii. In progress
   iii. Completed

   Status: Not started
   Not started
   In progress
   Priority: Completed

7. Priority – populated with Medium – this can be changed
   i. High
   ii. Medium
   iii. Low

   Priority: Medium
   High
   Source: Medium
   Low

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Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals

8. Enter Description, Success Criteria and Comments, as needed

Description – detailed information regarding the goal.

Example: *"Develop and implement a process to manage the student employee appointment process. Develop written procedures documenting all steps in the process. Provide training to other staff in using the process. Develop a method to assess the use of the process and to identify changes to process as needed."*

Success Criteria (OPTIONAL) – detailed information on the desired outcome of the goal.

Example*: "Processes are developed and procedures documented by October 1, 2017. Training of other staff is completed by November 1, 2017. Begin assessing the process and making identified changes by December 1, 2017 with continued monitoring of the process.*

Comments (OPTIONAL) – any additional information about the goal

Example*: "This should be your #1 priority for the next 3 months. This process is critical to the success of the new system. I know it is a very short timeframe, but I have every confidence that you can accomplish this goal."*

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***Goals and Performance Evaluation Process
for USS and Unclassified Administrative &
Professional Employees – Employee Creates Goals***

7.	Add "Tasks" (OPTIONAL) – this is not required but it is available for use. If you are not using Tasks, skip to Step 8.
	Click on "Tasks" on left-hand of screen under "Goal Details"

Add Goal

* Goal Plan FY 2018 Goals - Edited Plan 6/18/17 - 6/16/18

* Goal Name

Tasks

Goal Details

Tasks

No data to display.

1. Click on the "+" to add tasks

Tasks

＋

No data to display.

2. Enter task details

* Name			
* Type	Coaching ▼	Priority	Medium ▼
Status	Not started ▼	Completion Percentage	0
Start Date	2/5/18	Target Completion Date	

Related Link None ＋

Comments   ▼   2 ∧ ∨   B I U ≡ ≡ 🔗 🔗 � ↷ ✎

a. Name – enter

* Name

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***Goals and Performance Evaluation Process
for USS and Unclassified Administrative &
Professional Employees – Employee Creates Goals***

b. Type – select from drop down

* Type | Coaching

- Coaching
- Conference
- Job Shadowing
- Mentoring
- Other
- Project
- Research
- Task Force
- Training

c. Status – select from drop down

Status | Not started

- Not started
- In progress
- Completed
- Overdue

d. Start Date – will be populated with today's date, but can be changed

e. Priority (OPTIONAL) – select from drop down

Priority | Medium

- High
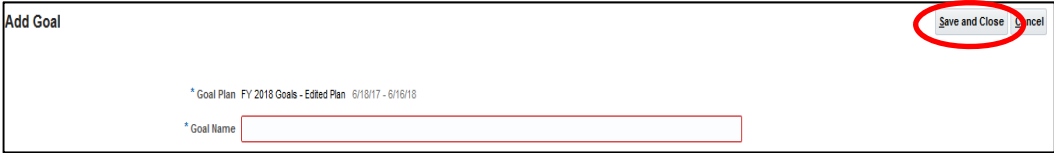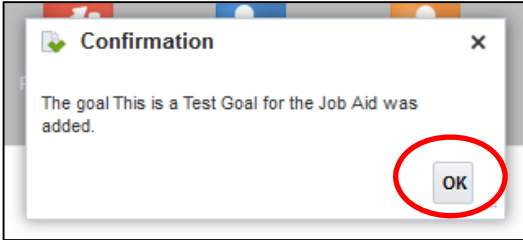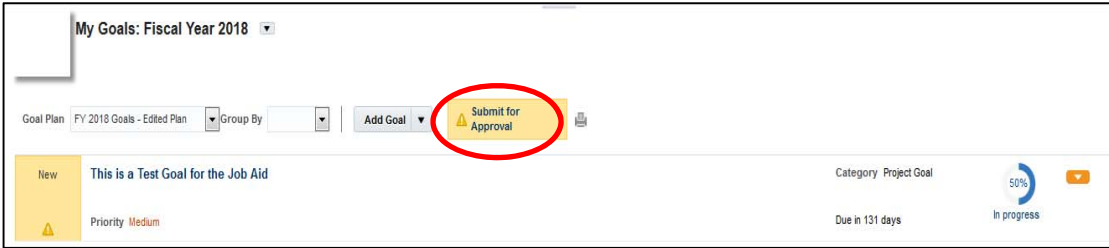- Medium
- Low

f. Completion Percentage - select from drop down

Completion Percentage | 0

- 0
- 25
- 50
- 75
- 100

g. Target Completion Date – enter date

Target Completion Date

Job Aid

Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals
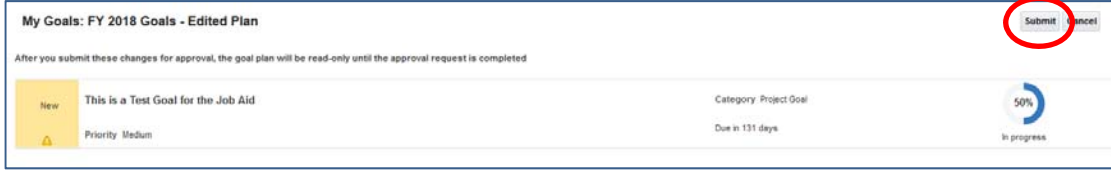
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	h. Comments (OPTIONAL) – enter any additional information about the task
8.	Click "Save and Close" in the upper right corner.
9.	A confirmation box will appear. Click "OK" to continue.
10.	You will return to the "My Goals" page. You can now add another goal by following Steps 5 – 10. After you have added all of your goals, click "Submit for Approval." This will send an email to your line manager that you have goals to be approved, edited or rejected. Click on "Submit"

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Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Employee Creates Goals

	My Goals: FY 2018 Goals - Edited Plan **Submit** Cancel After you submit these changes for approval, the goal plan will be read-only until the approval request is completed New — This is a Test Goal for the Job Aid — Category Project Goal — 50% Priority Medium — Due in 131 days — In progress You will return to the "My Goals" page. Please note the status Pending Approval Goal Plan FY 2018 Goals - Edited Plan — Group By — Add Goal ▼ — **Pending Approval** New — This is a Test Goal for the Job Aid — Category Project Goal — 50% Priority Medium — Due in 131 days — In progress
11.	You will not be able to add or edit any of your goals until your line manager has approved, edited or rejected your goals. After your line manager has acted on your goals, you will be able to add additional goals or edit the approved goals.