

# Job Aid



## **Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Line Manager Approves Employee Created Goal**

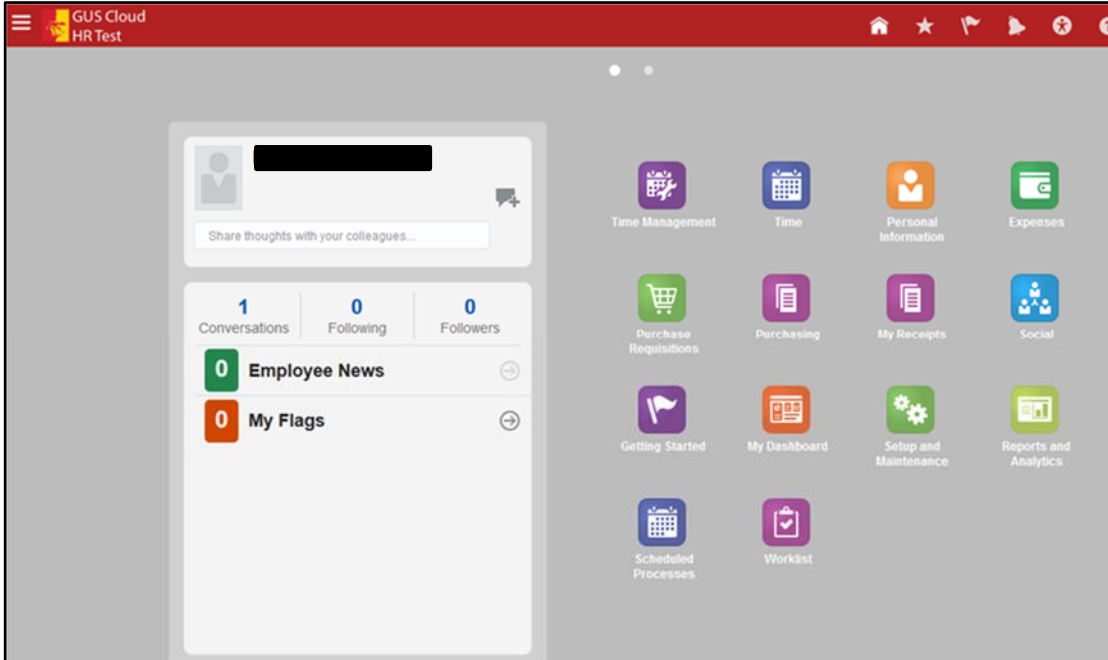

This Job Aid walks line managers through the process of approving a goal created by their direct reports for the Goals and Performance Evaluation Process.

**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**

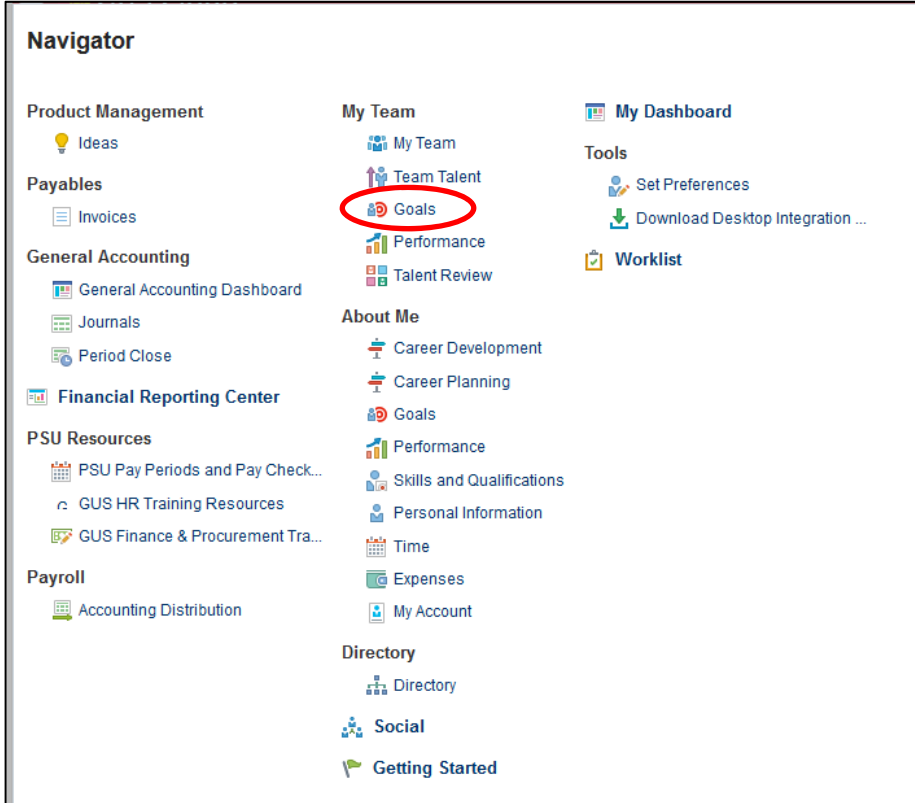

**Resources:** See [Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees](#) for an overview of the performance evaluation process and information on setting goals and types of goals.

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

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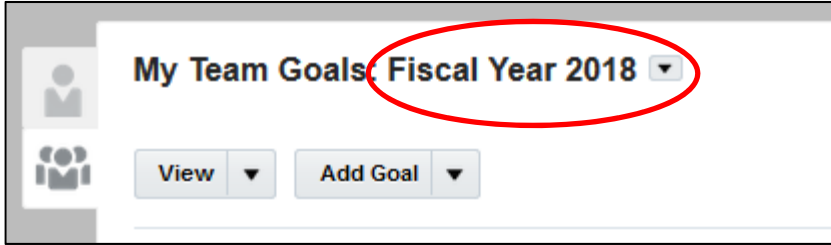
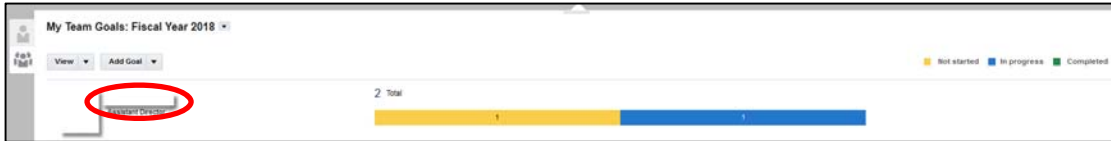
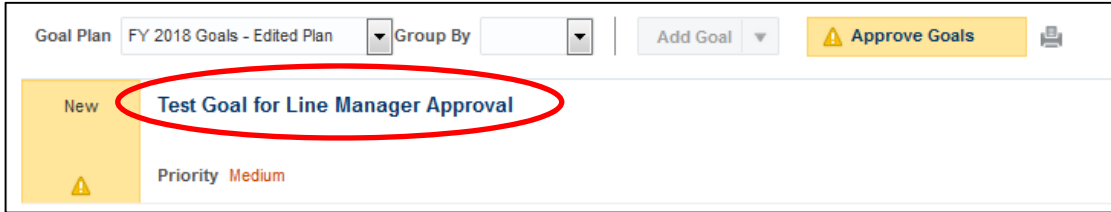
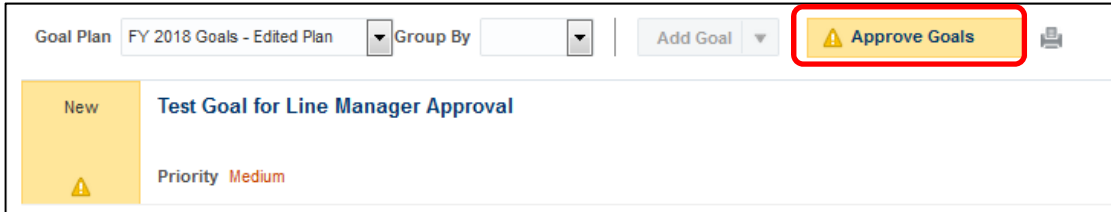
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3.	<p>Select “Goals” under “My Team.”</p>  <p>The screenshot shows a 'Navigator' menu with several categories. Under the 'My Team' category, the 'Goals' option is highlighted with a red circle. Other options in the 'My Team' category include 'My Team', 'Team Talent', 'Performance', and 'Talent Review'. Other categories include 'Product Management', 'Payables', 'General Accounting', 'Financial Reporting Center', 'PSU Resources', 'Payroll', 'About Me', and 'Directory'.</p>
4.	<p>Your “My Team 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.</p>  <p>The screenshot shows the 'My Team Goals: Fiscal Year 2018' page. A dropdown menu is open, showing two options: '2018 Feb Probationary Review' and 'Fiscal Year 2018'. The dropdown menu is circled in red. There are also 'View' and 'Add Goal' buttons on the page.</p>

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5.	<p>Click on the employee's name to view the employee's goals.</p> 
6.	<p>Click on the goal name to view the goal details. You will not be able to edit and/or update the goal at this time. You must “Approve Goal” before you can edit and/or update the goal.</p> 
7.	<p>Click “Approve Goals”</p> 

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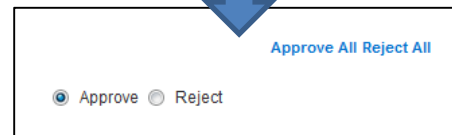


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The following screen will appear. You will be able to approve or reject the goal.



Click the appropriate box to “approve” or “reject”



8. Click “Submit” in the upper right-hand corner



9. The status on the employee’s goal page will change to “Pending Approval” until you refresh the page.



Click “Done” in the upper right-hand corner to return to your “My Team Goals” page.

When you click on the employee’s name again, the “Pending Approval” is gone.



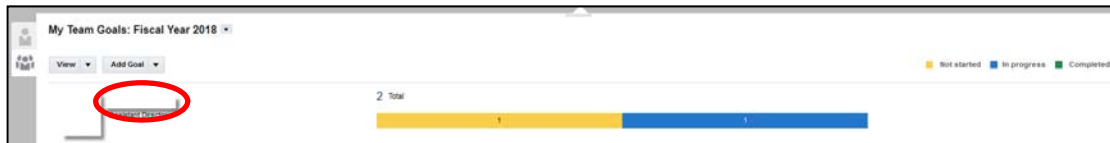
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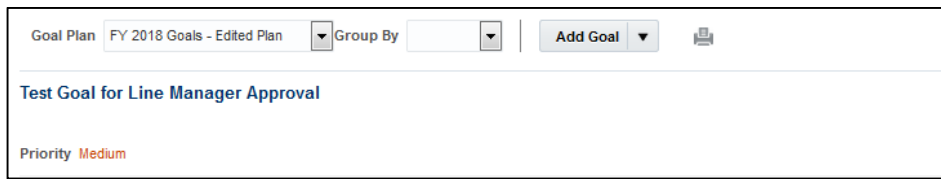
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10. You are now able to edit and/or update the employee's goal.

Click on the employee's name to view the employee's goals.



11. Click on the goal name to view the goal details.



12. Edit and/or update the Goal Details as needed:

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

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3. Category – select from drop down – this is optional – click [here](#) 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
	Managerial Goal
Description	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	▼
Source	High	
	Medium	
	Low	

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## Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Line Manager Approves Employee Created Goal

### 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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13. Add “Tasks” (OPTIONAL) – this is not required but it is available for use. If you are not using Tasks, skip to Step 14.

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

- a. Name – enter

\* Name



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b. Type – select from drop down

A screenshot of a web form field labeled 'Type'. The dropdown menu is open, showing a list of options: Coaching, Conference, Job Shadowing, Mentoring, Other, Project, Research, Task Force, and Training. The 'Coaching' option is highlighted in blue.

c. Status – select from drop down

A screenshot of a web form field labeled 'Status'. The dropdown menu is open, showing a list of options: Not started, In progress, Completed, and Overdue. The 'Overdue' option is highlighted in blue.

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

e. Priority – select from drop down

A screenshot of a web form field labeled 'Priority'. The dropdown menu is open, showing a list of options: High, Medium, and Low. The 'High' option is highlighted in blue.


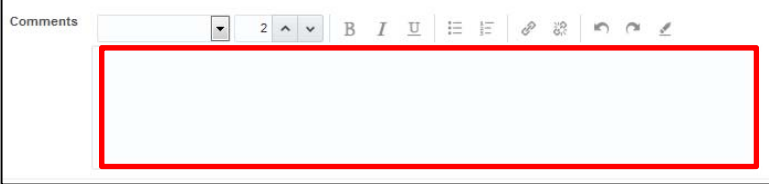

f. Completion Percentage = select from drop down

A screenshot of a web form field labeled 'Completion Percentage'. The dropdown menu is open, showing a list of options: 0, 25, 50, 75, and 100. The '0' option is highlighted in blue.

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	<p>g. Target Completion Date</p>  <p>h. Comments</p> 
14.	Click “Save and Close” in the upper right corner. 
15.	A confirmation box will appear. Click “OK” to continue. 