

Job Aid



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

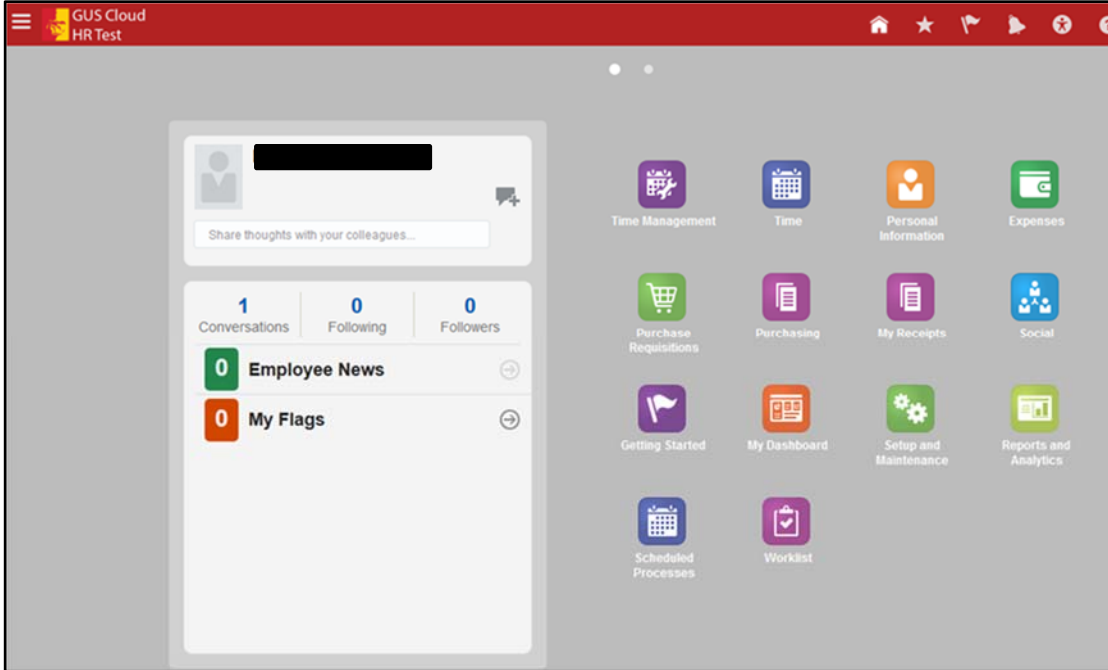

This Job Aid walks line managers through the process of creating goals for their direct reports for the Goals and Performance Evaluation Process.

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.

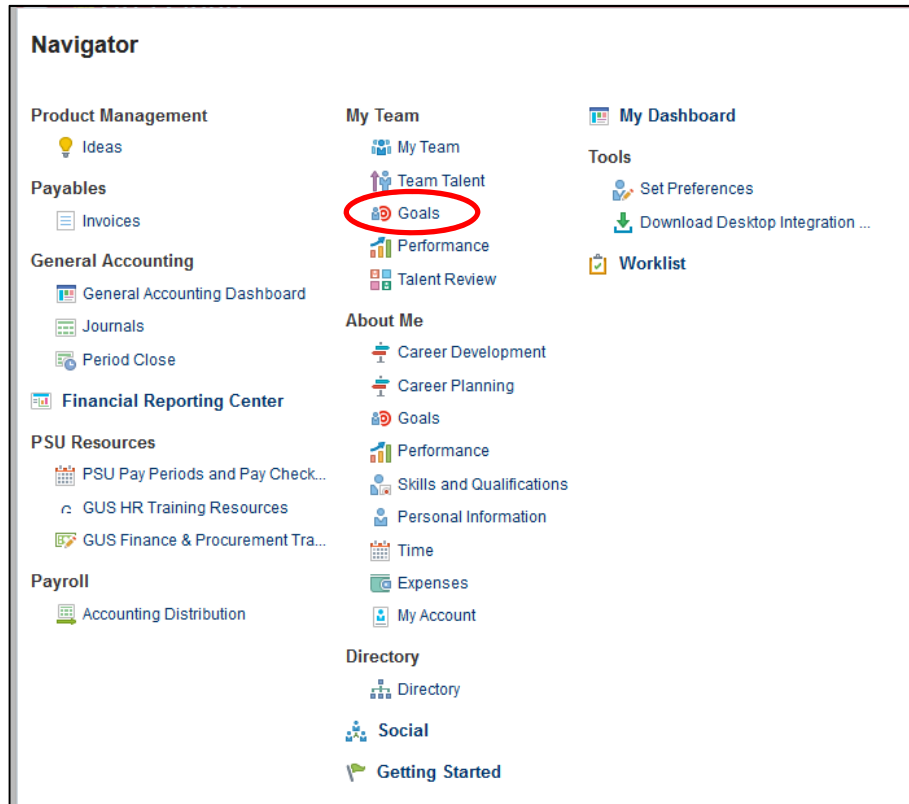
| Step | Action |
|------|---|
| 1. | <p>Logon to GUS Cloud.</p>  |
| 2. | <p>On the GUS Cloud springboard, select the Navigator icon.</p>  |

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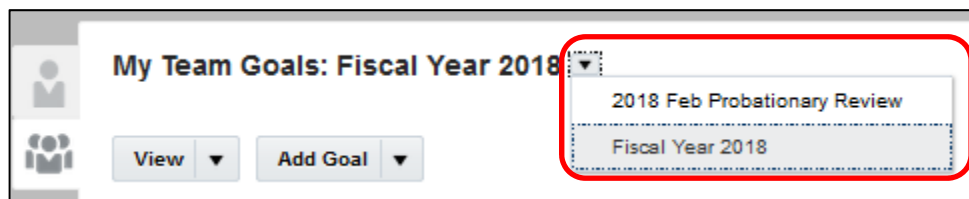
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3. Select “Goals” under “My Team.”



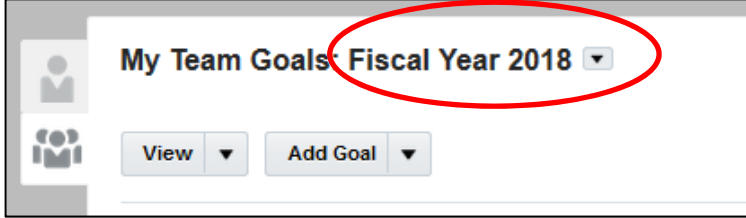
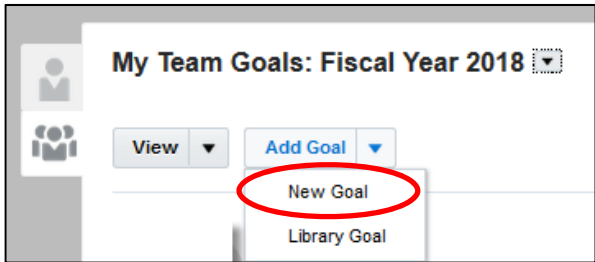
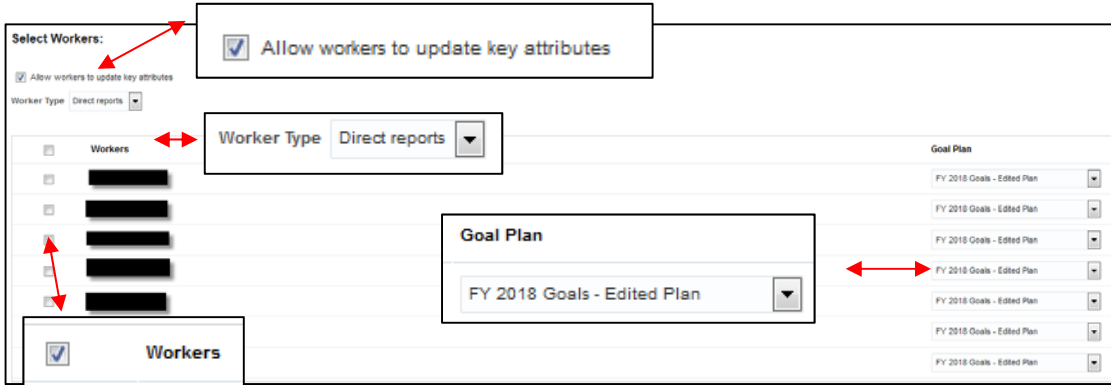
4. Your “My Team Goals” page will open. If more than one review period is available, you will need to select the appropriate review period from the drop down.



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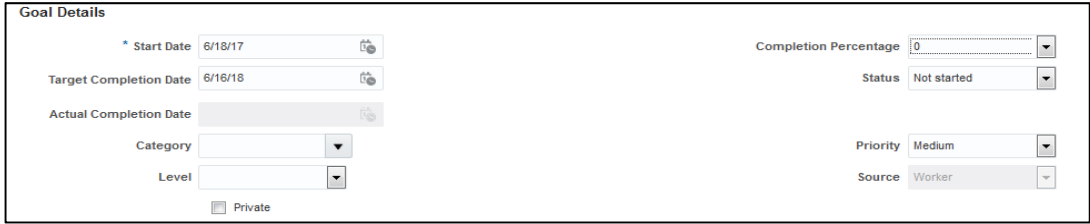
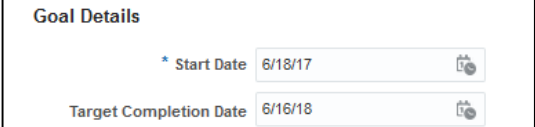
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| | |
|-----------|--|
| |  |
| <p>5.</p> | <p>From the “Add Goal” drop down, select “New Goal”</p>  |
| <p>6.</p> | <p>The following page will appear. If the check box by the employee name is grayed out and unavailable to use, it means the employee has a goal that you need to approve. Once you approve the goal, you can enter goals for the employee as well.</p>  <ol style="list-style-type: none"> Allow workers to update key attributes – this allows employee to edit and/or update the goal. If you do not want the employee to edit and/or update the goal, uncheck the box. Worker Type = Direct reports – this cannot be changed Workers – select the employee(s) in which you want to add a goal. If you select more than one employee, all the employees selected will get the same goal. Goal Plan = goal plan selected in Step 5. |

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| | |
|----|--|
| | <p>Once you have selected the employee(s), click “Next”</p>  |
| 7. | <p>Enter the Goal Name – this will be the goal name displayed on the employee’s “My Goals” page.</p> <p>Example: <i>“Develop and implement procedures to manage the student employee appointment process.”</i></p>  |
| 8. | <p>Enter Goal Details:</p>  <ol style="list-style-type: none">1. Start Date – will be populated with first day of review period but can be changed2. 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 goal

- i. Financial
- ii. Developmental Goal
- iii. Managerial Goal
- iv. Operational Task Goal
- v. Performance Improvement Goal
- vi. 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

6. Status – select from drop down

- i. Not started
- ii. In progress
- iii. Completed

7. Priority – populated with Medium – this can be changed

- i. High
- ii. Medium
- iii. Low

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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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9. 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”

1. Click on the “+” to add tasks

2. Enter task details

- a. Name – enter

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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 |

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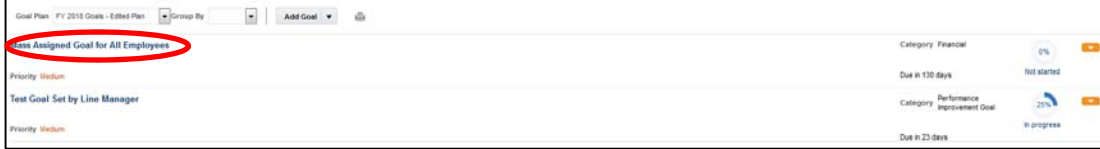
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| | <p>g. Target Completion Date – enter date</p> <div data-bbox="516 472 1166 556"><p>Target Completion Date <input type="text"/></p></div> <p>h. Comments (OPTIONAL) – enter any additional information about the task</p> <div data-bbox="516 703 1279 892"><p>Comments <input type="text"/></p></div> | | | | | | | | | | | | | | | | | | | | |
|----------------------|--|-------------|-------------|-------------|-------------|-----------|----------------------|---|---|---|---|----------------------|---|---|---|---|----------------------|---|---|---|---|
| 8. | <p>Click “Save and Close” in the upper right corner.</p> <div data-bbox="332 966 1356 1050"><p>Add Goal for My Team <input type="text"/></p><p><input type="button" value="Save and Close"/></p></div> | | | | | | | | | | | | | | | | | | | | |
| 10. | <p>A confirmation box will appear. Click “OK” to continue.</p> <div data-bbox="324 1165 592 1365"><p>Confirmation X</p><p>The goal was added.</p><p><input type="button" value="OK"/></p></div> | | | | | | | | | | | | | | | | | | | | |
| 10. | <p>You will return to the “My Team Goals” page. You can now add another goal by following Steps 5 – 10.</p> <div data-bbox="324 1554 1421 1816"><p>My Team Goals: Fiscal Year 2018</p><p>View Add Goal</p><table border="1"><thead><tr><th>Goal</th><th>Total</th><th>Not started</th><th>In progress</th><th>Completed</th></tr></thead><tbody><tr><td><input type="text"/></td><td>2</td><td>2</td><td>0</td><td>0</td></tr><tr><td><input type="text"/></td><td>2</td><td>1</td><td>1</td><td>0</td></tr><tr><td><input type="text"/></td><td>4</td><td>1</td><td>3</td><td>0</td></tr></tbody></table></div> | Goal | Total | Not started | In progress | Completed | <input type="text"/> | 2 | 2 | 0 | 0 | <input type="text"/> | 2 | 1 | 1 | 0 | <input type="text"/> | 4 | 1 | 3 | 0 |
| Goal | Total | Not started | In progress | Completed | | | | | | | | | | | | | | | | | |
| <input type="text"/> | 2 | 2 | 0 | 0 | | | | | | | | | | | | | | | | | |
| <input type="text"/> | 2 | 1 | 1 | 0 | | | | | | | | | | | | | | | | | |
| <input type="text"/> | 4 | 1 | 3 | 0 | | | | | | | | | | | | | | | | | |

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|-----|---|
| 11 | <p>Click on the employee's name to view the employee's goals.</p> <p>Click on the goal name to view the goal details, update and/or edit the goal.</p>  |
| 12. | <p>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.</p> |