Job Aid

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

This Job Aid walks employees through the process of creating and editing goals for line manager approval in 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 Performance Evaluation Process for an overview of the performance evaluation process and information on setting goals and types of goals.

Create Goal	Steps 1 – 8
Edit and/or Review Goal	Steps 1-2 and 9-10

Step	Action
1.	Log on to GUS Cloud. It will open the Me springboard. Select **Goals**.
2.	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 at the top of the page.
3.	Click **Add Goal**
4.	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."* b. Enter Goal Details: 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.

3. **Category** – select from drop down – this is optional – click here for additional information regarding types of goals
    i. Financial
    ii. Developmental Goal
    iii. Operational/Task Goal
    iv. Performance Improvement Goal
    v. Project Goal
    vi. Professional Growth
    vii. Management & Leadership
    viii. Scholarly/Creative Activities
    ix. Service
    x. Teaching

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

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.

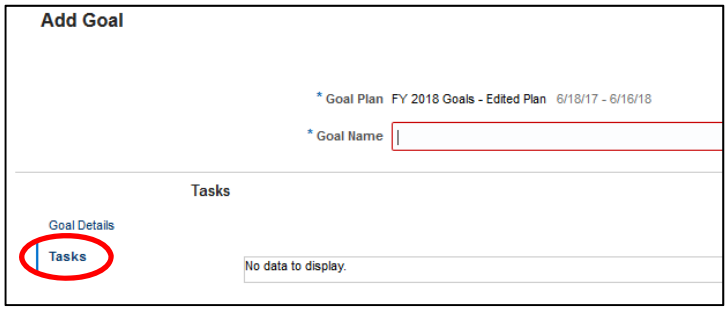
Example*: "Processes are developed and procedures documented by October 1, 2017. Training of other staff is completed by November 1, 2017. Begin assessing the process and making identified changes by December 1, 2017 with continued monitoring of the process.*

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."*

5. 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"



Click on the "+" to add tasks



Enter task details

1. **Name –** enter

	2. **Type** – select from drop down a. Coaching b. Conference c. Job Shadowing d. Mentoring e. Other f. Project g. Research h. Task Force i. Training 3. **Status** – select from drop down a. Not started b. In progress c. Completed d. Overdue 4. **Start Date** – will be populated with today's date, but can be changed 5. **Priority (OPTIONAL)** – select from drop down 6. **Completion Percentage** - select from drop down 7. **Target Completion Date** – enter date 8. **Comments** (OPTIONAL) – enter any additional information about the task Click **Save and Close** in the upper right corner. A confirmation box will appear. Click **OK** to continue.
6.	You will return to the "My Goals" page. You can now add another goal by following Steps 3 – 5. After you have added all of your goals, click **Submit for Approval**. Click on **Submit** This will send an email to your line manager that you have goals to be approved, edited or rejected.
7.	You will return to the "My Goals" page. Please note the status Pending Approval

8.	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.
9.	Click on the **Goal Name** to view the goal details.
10.	You can edit and/or update the **Goal Details** as needed after your Line Manager has approved your goals. If the status of the goal is "Completed" (or if the Completion Percentage is 100%), you will get a warning message if you did not enter an Actual Completion Date.