# Job Aid

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

This Job Aid walks line managers through the process of creating goals for and/or approving goals 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 Performance Evaluation Process for an overview of the performance evaluation process and information on setting goals and types of goals.

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| Create Goal | Steps 1 - 10 |
| Approve Employee Created Goal | Steps 1–3 and 11-17 |

| Step | Action |
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| 1. | Log on to GUS Cloud. It will open the Me springboard. Select the **My Team** tab. |
| 2. | On the My Team springboard, select **Goals**. |
| 3. | 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 at the top of the page. |
| 4. | You can add the same goal to multiple employees (Steps 5 – 10) or to one employee by clicking on the Employee's Name then following Steps 6 – 10. |
| 5. | From the **Add Goal** drop down, select **New Goal** |
| 6. | A list of your direct reports will appear. Select the employee(s) by checking the box next to the employee(s) name<br><br>*If the check box by the employee's 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.* |

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| | a. **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.<br>b. **Worker Type** = Direct reports – this cannot be changed<br>c. **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.<br>d. **Goal Plan** = displays goal plan selected.<br><br>Click **Next** |
| 7. | Enter **Goal Name** – this will be the goal name displayed on the employee's "My Goals" page.<br><br>Example: *"Develop and implement procedures to manage the student employee appointment process."* |
| 8. | Enter Goal Details:<br><br>1. **Start Date** – will be populated with first day of review period but can be changed<br><br>2. **Target Completion Date** – will be populated with last day of review period but can be changed<br><br>3. **Category** – select from drop down – this is optional – click here for additional information regarding types of goal<br><br>i. Financial<br>ii. Developmental Goal<br>iii. Operational/Task Goal<br>iv. Performance Improvement Goal<br>v. Project Goal<br>vi. Professional Growth<br>vii. Management & Leadership<br>viii. Scholarly/Creative Activities<br>ix. Service<br>x. Teaching<br><br>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.*

    **Comments** (OPTIONAL) – any additional information about the goal

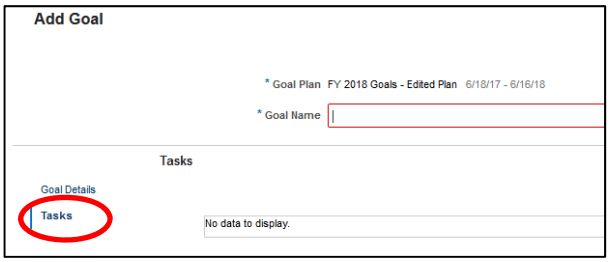
    Example: *"This should be your #1 priority for the next 3 months. This process is critical to the success of the new system. I know it is a very short timeframe, but I have every confidence that you can accomplish this goal."*

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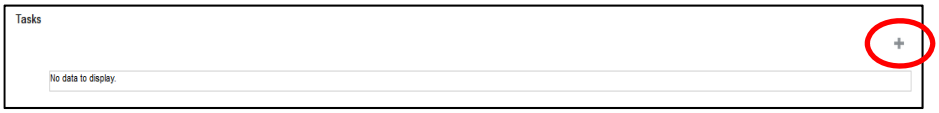
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9. Add **Tasks** (OPTIONAL) – this is not required but it is available for use. If you are not using Tasks, skip to Step 9.

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

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| | 4. **Start Date** – will be populated with today's date, but can be changed<br>5. **Priority** (OPTIONAL) – select from drop down<br>6. **Completion Percentage** = select from drop down<br>7. **Target Completion Date** – enter date<br>8. **Comments** (OPTIONAL) – enter any additional information about the task<br><br>Click **Save and Close** in the upper right corner.<br><br>A confirmation box will appear. Click **OK** to continue |
| 10. | You will return to the "My Team Goals" page. You can now add another goal by following Steps 5 – 9. |
| 11. | Click on the employee's name to view the employee's goals. |
| 12. | Click on the goal name to view the goal details, update and/or edit the goal.<br><br>*If the goal was created by the employee, 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.* |
| 13. | Click **Approve Goals** |
| 14. | The following screen will appear. You will be able to approve or reject the goal.<br><br><br><br><br>Click the appropriate box to **Approve** or **Reject**<br><br><br> |

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| 15. | Click **Submit** in the upper right-hand corner |
| 16. | The status on the employee's goal page will change to "Pending Approval" until you refresh the page. |
| 17. | 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 |