Performance Management System

Goals - Employee Job Aid
An employee can access their goal plan from the home page by clicking on “Home”.

Click on “Goals”.

Add a custom goal to the goal plan

Click on “Add Goal to Plan”.

Guide:
- At least one goal must be established within any of the three sections below. This performance evaluation cannot be completed if a minimum of one goal is not established. For assistance in setting goals, please visit the KU Core Competencies website.
- Employees are goals set at an individual level to establish expected outcomes and guide employees efforts within the unit.
- In addition to goals, employees will be evaluated on University Core Competencies and the expectations defined in their position description. The Competencies found on the KU Core Competencies website.
- Goals should be set within the first quarter of the performance evaluation review period.

To add a new goal, click “Add Goal to Plan” in the top right of the screen.
The employee can choose from two options; “Create Goal” or “Library Goal”. To create your own goal, click “Create Goal”.

Select the goal category; “Employee Goals”, “Professional Development Goal”, or “Other”.

The employee can choose from two options; “Create Goal” or “Library Goal”. To create your own goal, click “Create Goal”.

Select the goal category; “Employee Goals”, “Professional Development Goal”, or “Other”.
In the “Goal Name” type in a name for the goal. The Goal Name would be a very brief description of the goal the employee is setting.

In the “Goal Description” text field type in a detailed description of the goal. Consider the SMART (Specific, Measurable, Attainable, Realistic, Timely) technique when creating the goal description.
Adding tasks is optional. To add tasks to a goal, click add tasks.

In “Task Description” type in a description of a task that is necessary or part of the goal.
Type or select the start date and end date of the task. The date requires the format indicated, MM/DD/YYYY.

Additional tasks can be added by clicking the plus sign.
If multiple tasks are added, they can be moved up or down by clicking the arrows.

Tasks can be deleted, if necessary, by clicking the buttons to delete tasks.
In the “Measure of Success” text field type in how the goal will be measured. Remember the SMART (Specific, Measurable, Attainable, Realistic, Timely) technique when establishing the measure of success for the goal.

Type or select the start date and end date of the goal. The date requires the format indicated, MM/DD/YYYY.
The employee can click “Spell Check” to perform spell check of the text fields they have completed.

The employee can click “Legal Scan” to have the language used scanned and reviewed for suggested changes.
Click “Save Changes” to save the goal to the goal plan.

Employees can also add a goal to their goal plan using the Goal Library. To add a goal from the Goal Library click, “Add Goal to Plan”.

Click “Library Goal”.

Add Goal to Goal Plan using Goal Library
Several categories are available to choose from. Select a category by clicking on the category name.

After clicking on a category, subcategories are displayed. Select one of the subcategories by clicking on the name.
After clicking on the sub category, two columns are displayed.
1. The column on the left is the “Goal Name”.
2. The column on the right is the “Measure of Success” for that goal.

Select a goal by clicking the checkbox next to the goal.
Click “Add Selected Goal” to move to the next step.

Notice that the “Goal Name” and the “Measure of Success” are filled in from what was selected from the Goal Library.
As detailed above, select the Category, type in the Goal Description, add tasks (if needed), select or type start date and select or type due date.

Once all required fields are completed, click “Save Changes”.

How to Edit Goals
To edit a goal that has been created, click “Edit” next to the goal name.

Any changes made when first creating a goal, can be made when editing a goal. To include editing the following fields: Category, Goal Name, Goal Description, Tasks, Measure of Success, and dates.

Once changes are made click “Save Changes”
Click on the gear icon under “Action”.

Click “Add Goal to Outlook”.

That will open an Outlook calendar invite. The following information will be filled in automatically: 1) the subject with the goal name, 2) the body with the goal name and the goal description, and 3) the start date of the invitation defaults to the due date of the goal.

How to change the order of goals
To rearrange the order of goals within a Goal Category, click on the gear icon under “Action”.

If an employee has more than one goal within the goal category, the employee will have the option to “Move goal down” or “Move goal up”. If the employee has more than two goals, both “Move goal down” and “Move goal up” will be available.

As an example, after clicking “Move goal down” the employee will see the goal move down in the order.

How to provide progress updates on goals
Throughout the evaluation period, it is expected that the employee and supervisor provide progress updates and feedback on the established goals. To provide progress updates, the employee should click “edit” next to the goal they need to update.

The completion percentage can be changed by typing in a percentage between 0 and 100.
The status can be updated by clicking the drop down next to “Not Started”.

Choose from the options available: “Not Started”, “On Target”, “Off Target”, “Will Not Meet”, “No Longer Applicable”

To provide a progress update, click “Add Progress Update”.
The date keyed here will be the date of the progress update. The format required is MM/DD/YYYY.

Employees can provide progress comments to include comments on what they have accomplished so far toward completing their goal.
Additional progress updates can be added by clicking the plus sign.

If multiple progress updates are added, they can be moved up or down by clicking the arrows.
Progress updates can be deleted by clicking the x’s.

Once the progress update has been completed, click, “Save Changes” to save the progress update and return to the goal plan.
The progress updates will appear on the goal in the goal plan.

How to review changes made by supervisor

When a supervisor makes changes to a goal the employee will receive an email notification and an alert will show up on the goal plan.

To view what changes were made, click on the gear icon under “Action”.

Click on “View goal detail” to see what was changed.
The highlighted areas show what areas were edited by the supervisor.

In the “Audit History” a history of changes is maintained. To see how the goal looked before changes were made, click on “view”.

The goal history is displayed.

Additional Goal Plan functions
Click on “Display” to view available display options.

You can select what information is displayed within your goal plan by clicking the check boxes and clicking “update”.

To print the goal plan click on the print icon.
You can select HTML or PDF formatting. Select by clicking the button next to the option and then click “open”.