Performance Management System

Goals - Supervisor

Job Aid
The supervisor can access their direct report’s goal plan, from their home page, by clicking “Home”.

Click on “Goals”.

By clicking on “Goals” the supervisor will be taken to their (the supervisor’s) own goal plan. A supervisor can navigate to their direct report’s goal plan, by clicking on the arrow next to their own name.
Under “Reports” the supervisor will see the employees who report directly to them. To navigate to the employee’s goal plan click on the employee’s name.

Once the supervisor clicks on the employee’s name, they will be taken to the employee’s goal plan.

How to add a goal to the employee’s goal plan

The supervisor can choose from two options; “Create Goal” or “Library Goal”. To create a custom goal, click “Create Goal”.

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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 will be a very brief description of the goal being set.
In the “Goal Description” text field, type in a detailed description of the goal. Consider the SMART (Specific, Measurable, Attainable, Realistic, Timely) technique when developing the goal description.

Adding tasks is optional. To add tasks to a goal, click add tasks.
In “Task Description” type 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 supervisor 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.

The supervisor should click “Save Changes” to save the goal to the employee’s goal plan.
Supervisors can also add a goal to an employee's goal plan using the Goal Library. To add a goal from the Goal Library click, “Add Goal to Plan”.

Click “Library Goal”.

Several categories are available to choose from. Select a category by clicking on the category name.
After clicking on a category, sub categories are displayed. Select one of the sub categories 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. The supervisor can edit these fields if needed.

As detailed above, select Category, type in Goal Description, add tasks (if needed), select or type start date and 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”.

How to Delete a goal

To delete a goal from a direct report’s goal plan, click on the gear icon under “Action”.

Click “Delete Goal” to delete the goal from the employee’s goal plan. Before deleting a goal from the employee’s goal plan, the supervisor should speak with the employee.

How to Add a Goal to Outlook
Click on the gear icon under “Action”.

Click “Add Goal to Outlook”.

Clicking “Add to Outlook” will open an Outlook calendar invite. The following information will be filled in automatically: 1) 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. The supervisor can send the invitation to the employee for whom they have set a 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 supervisor will have the option to “Move goal down” or “Move goal up”. If the employee has more than two goals in a goal category, both “Move goal down” and “Move goal up” will be available.

As an example, after clicking “Move goal down” the supervisor 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 supervisor 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”, or “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.
Supervisors can provide progress comments to include comments on what the employee has accomplished toward completing their goal or any further action needed.

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.

Cascading a goal allows a supervisor to select a goal from their own goal plan and “cascade” or push their goal down to an employee that reports to them. The supervisor starts from their own goal plan.
The supervisor should click on the check box next to the goal on their own goal plan that should be cascaded.

Once the goal has been checked, click “Cascade”.

Once the supervisor clicks “Cascade” a new window will open. The supervisor should click in the check box next to the employee or employees they wish to cascade the goal to.
Once the employee or employees have been selected click “Next”.

The supervisor will have the option of revising the goal before cascading the goal. Once necessary changes have been made, click “Cascade”.

Once the goal has been cascaded, an alert will show on the supervisor’s goal plan.
An alert also displays on the employee’s goal plan notifying them the goal was cascaded down to them.

How to review changes made to the goal by the employee

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. Additionally, when an employee makes changes to their goals, the supervisor will receive an email notification.

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

Click on “View goal detail” to see what was changed.
In the “Audit History” a history of changes is maintained. To see how the goal looked before changes were made, click on “view” next to the person who made the change.

Clicking on “view” allows the employee or the supervisor to see each individual change to the goal.

The highlighted areas show what was edited.
Click on “Display” to view available display options.

An employee can select what information is displayed within their goal plan by clicking the check boxes and clicking “Update”.

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

Click on the “Print” icon when the document opens.