

## About Goal Setting

- Each employee should set a minimum of two individual goals.
- Each employee should receive a minimum of two goals from their direct Supervisor, which could be departmental or individual goals.
- Each employee should have a maximum of eight goals in their goal plan.
- Goal plans will feed into the Appraisal form and will count for 20% of the overall appraisal score.

## Creating Goals to Cascade to Employees

Supervisors have the responsibility of creating their own individual goals and departmental or individual goals for their employees as well. A Supervisor will see two tasks under **My To Do's**.



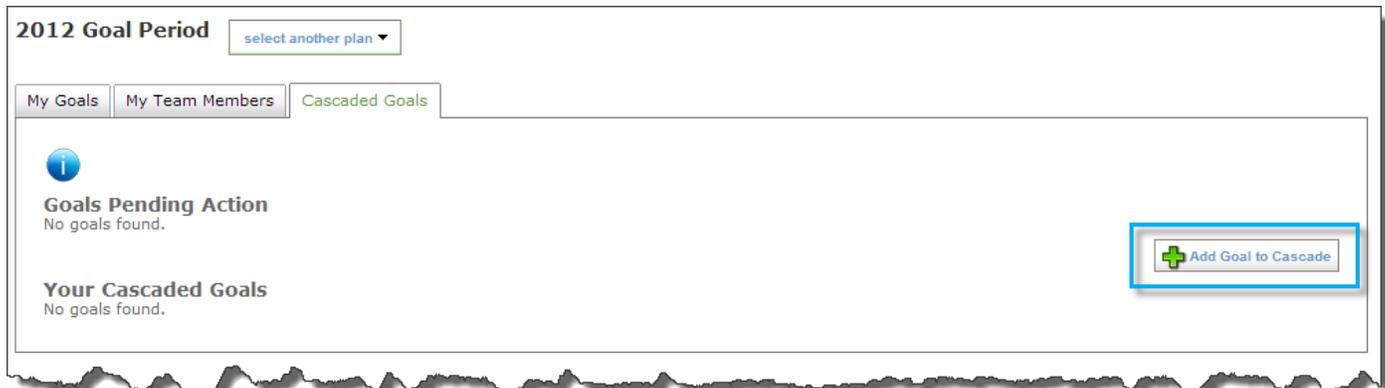
**My To Do's (2)** Sort Options ▾

Assign Goals  
Status: Live and in progress Past Due: 3/31/2015

Set Your Goals  
Status: Live and untouched Past Due: 3/31/2015

You will click the **Set Goals** task to create your own individual goals. You will click **Assign Goals** to create new goals for your team members.

The goal planning page displays three tabs:



2012 Goal Period select another plan ▾

My Goals | My Team Members | **Cascaded Goals**

**Goals Pending Action**  
No goals found.

**Your Cascaded Goals**  
No goals found.

+ Add Goal to Cascade

The **My Goals** tab is used to manage your own goals.

The **My Team Members** tab is used to manage individual team member goals and to see the goal status of all employees that report up through you in the organizational chart.

The **Cascaded Goals** tab is used to create goals that you will assign to team members and cascade them.

To create a goal that will cascade, click **Add Goal to Cascade**.

## Supervisor Goal Setting Instructions – Performance system

The system displays the **Goal Details** page. On this page:

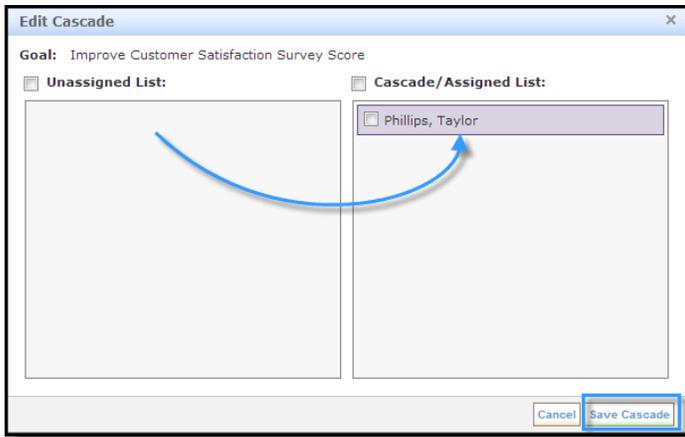
1. Select Individual Goals if you will be sending the goal to one of your direct reports or Departmental Goals if you will be sending the goal to your entire team. Ignore the Organizational and Miscellaneous options, they are for future use.
2. Enter a description of the goal (using the SMART goal method).
3. Set a due date for the goal (defaults to the end of the performance cycle).
4. The measurement and notes fields are optional. Use them as you need to.
5. Click Save Goal to Cascade to save the goal in your direct report's goal plan.

### Cascading Goals to Employees

The system returns to the **Cascaded Goals** tab where the goal can now be cascaded to team members.

Under **Actions**, Select **Edit Cascade**.

## Supervisor Goal Setting Instructions – Performance system

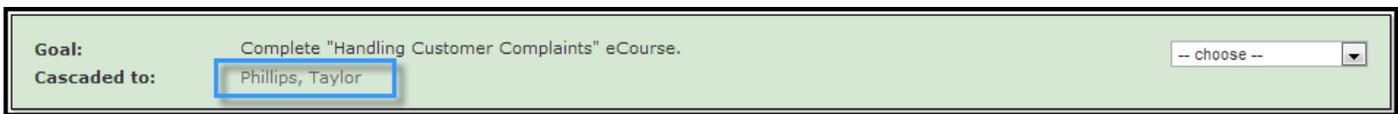


In the pop-up box, drag the employee(s) name from the **Unassigned List** to the **Cascade/Assigned List**.

**Note:** To move multiple team members from one list to the other, click the desired check boxes and then drag all names to the other box. All the checked members will move together.

Then click Save Cascade.

The system refreshes and indicates that the goal has been cascaded to the selected employee(s).



## Approving or Rejecting a Goal Plan

After an employee submits their goal plan for approval, a Supervisor has a new task under My To Do's. Supervisors must review and approve or reject employee goals.

Click the task title to open the task ("Review Plan for Taylor..").



The system opens the goal planning page for the launched goal plan.

Choose Approve Plan to approve the plan and finalize the goal setting process for this employee.

Choose Reject Plan to send the plan back to the employee for changes.

An email is sent to the employee informing them of the decision.

If you have Approved the plan, this finalizes the goal setting part of the process.

