

Approving and Managing Employee and Team Goals

Overview

- This job aid is intended for managers to approve or manage goals for their direct reports.
- Goals submitted or edited by employees will require manager approval. Please note, it is strongly recommended to discuss and give verbal approval for a goal before the employee enters it in the system or makes updates or edits.

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Approving and Managing Employee and Team Goals

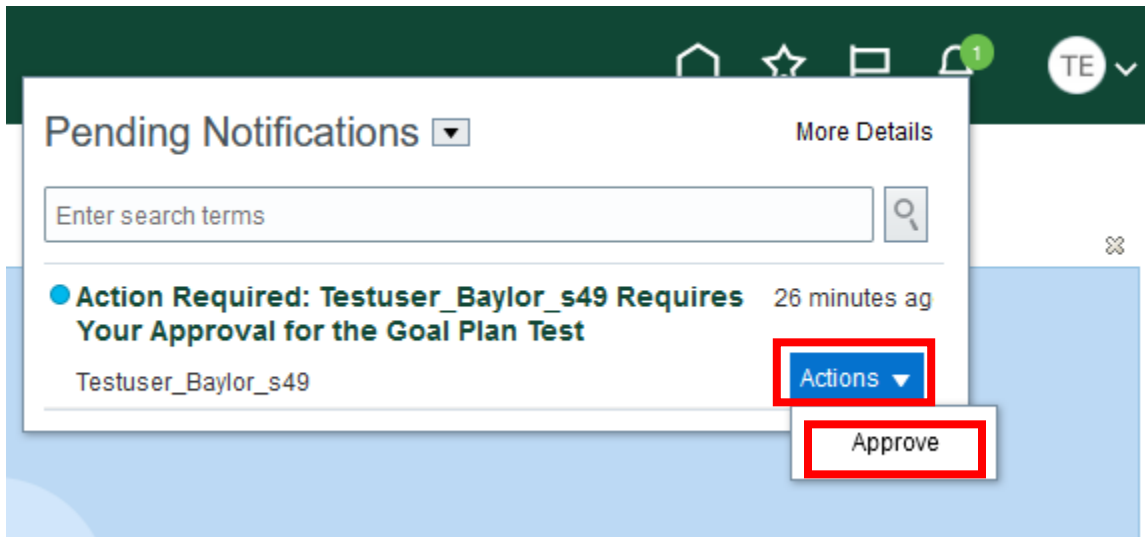
I. Approve Goals Using the Bell Notification

When an employee submits a new, edited, or updated goal, the manager can view and approve either using the **Bell notification** or the **Career and Performance Page** under **My Teams**. The Bell notification is the easiest method.

1. To use the **Notification Bell**, click the bell icon in the upper right-hand corner of the screen to check for notifications.

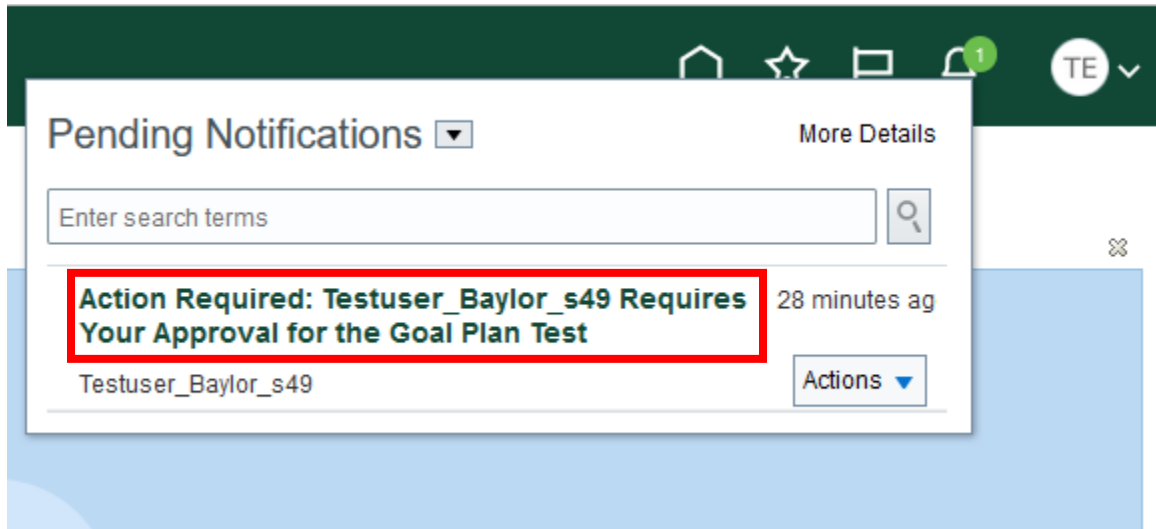


2. After clicking the notification bell, simply click **Actions** dropdown, then the **Approve** button to approve the goal.



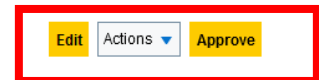
3. Alternatively, you can click on the name of the alert to see more details.

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- From here you can **Edit** or **Approve** the goal. Note: if multiple goals were submitted at once, they will all be approved at the same time. Additionally, if you want the employee to make changes to the goal before approving, you can either edit it yourself or ask the employee to withdraw the goal, edit, and resubmit.

Testuser_Baylor_s49 Requires Your Approval for the Goal Plan Test



Testuser_Baylor_s49 Goal Plan Approval Request

Worker Testuser_Baylor_s49 has submitted Test for your approval

Review Period Disclosure Review Period

Goal Plan Test

Added Goals test

Goal Name	test
Status	Not started
Start Date	2021-08-15
Target Completion Date	

Approval History

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5. Click **Submit**. Note: although you can add additional comments when approving the goal, it is not recommended as the employee may not see them. If you need to communicate with the employee regarding the goal, it is better to use email or do so in person.

Approve

Submit

Cancel

Comment



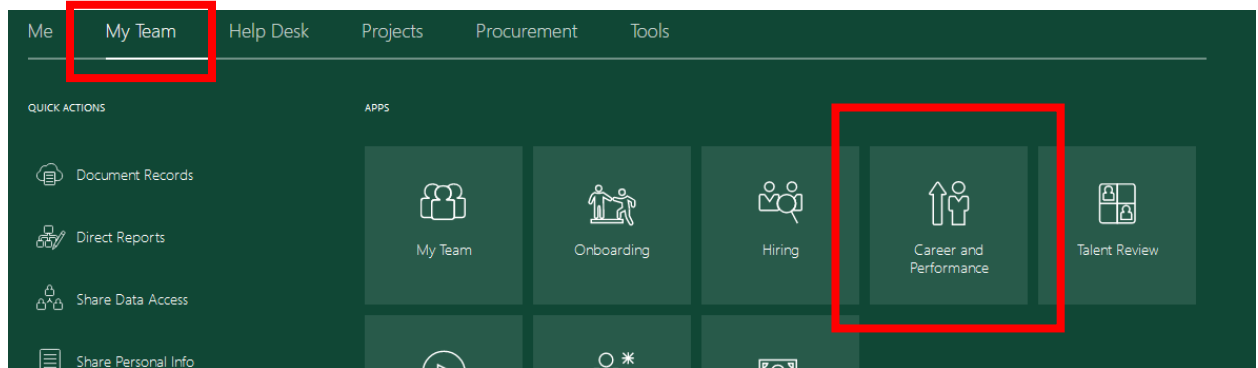
Drag files here
or click to add
attachment



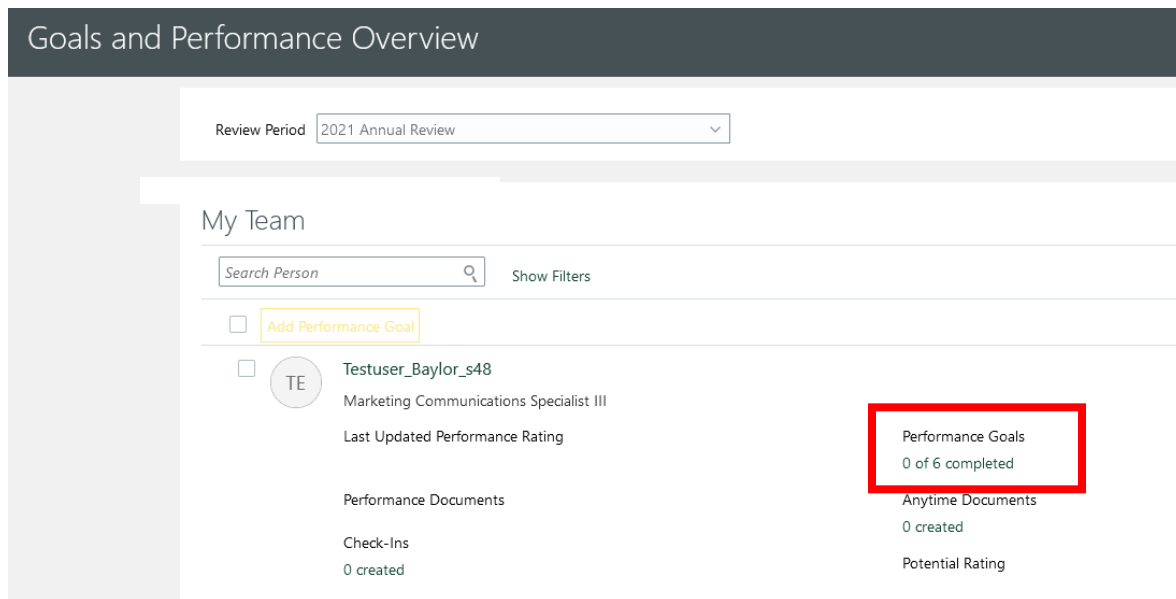
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2. Approve Goals Through Career and Performance in My Teams

1. You can access the **Career and Performance** tile under the **My Team** heading on the home page.



2. On the **Goals and Performance Overview** page there will be a list of direct reports. In the section for the specific employee, click on the hyperlink under **Performance Goals** indicating the number of goals completed. This will take you to the employee's personal goal page.

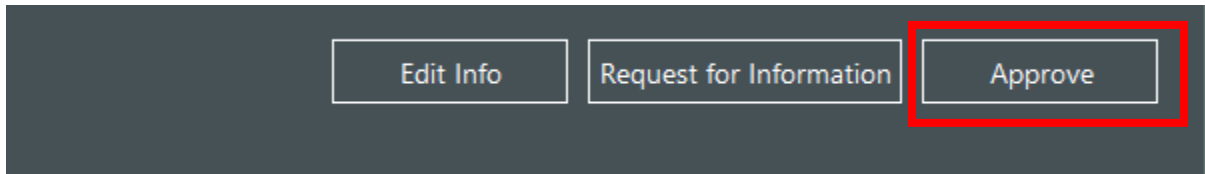


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3. Click **See details**.



4. On this screen you will be able to see details about the goal. In the upper right of the screen, click **Approve**.



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3. View/Manage/Edit Direct Reports' Goals

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document.
2. On the **Goals and Performance Overview** page there will be a list of direct reports. In the section for the specific employee, click on the hyperlink indicating the number of goals completed under **Performance Goals**. This will take you to the specific employee's goal page.

The screenshot shows the 'Goals and Performance Overview' page for a team member. At the top, there is a 'Review Period' dropdown set to '2021 Annual Review'. Below this is the 'My Team' section, which includes a search bar for 'Search Person', a 'Show Filters' button, and a 'Sort By' dropdown set to 'Name ascending'. A list of team members is displayed, with the first entry highlighted. The entry for 'Testuser_Baylor_s48' (Marketing Communications Specialist III) has a 'Performance Goals' link with '0 of 6 completed' next to it, which is highlighted with a red box. Other metrics shown include 'Performance Documents', 'Check-Ins', 'Anytime Documents', and 'Potential Rating'.

3. Click on the **goal name** you'd like to manage or edit. To manage a goal, you may edit anything on the goals detail page.

2020-21 Performance Goals

The screenshot shows the '2020-21 Performance Goals' page. At the top, there is an 'Actions' button. Below this is a list of goals, with the first goal highlighted. The goal is 'Priority Management' and is highlighted with a red box. The goal's status is 'Not started' and its weight is '0%'.

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4. To edit the goal, click the **Edit** button.

Basic Info



Goal Name
Priority Management

Status
Not started

Start Date
06/01/2020

Weight
0%

Target Completion Date
05/07/2021

Source
Manager

Last Update
Testuser_Baylor_s47 07/11/2020

5. The goal details are displayed. You can edit any section of the form as well as add additional details. When you're finished managing the goal, click **Save**.

Basic Info



*Goal Name

Priority Management

Allow worker to update key attributes

Description

Empty text area for description.

*Start Date

06/01/2020

Status

Not started

Target Completion Date

05/07/2021

Weight

0

Category

Select a value

Success Criteria

Rich text editor toolbar with options for font, size, bold, italic, underline, list, link, unlink, undo, redo, and insert.

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4. Create Goals for Individual or Multiple Employees

You can create and add a goal for one or more of your employees.

1. Navigate to the **Goals and Performance Overview Page** under **My Team** as previously described. Check the box by the employee(s) you'd like to create a goal for. Then select **Add Performance Goal**.

The screenshot shows a table of employees with checkboxes and an 'Add Performance Goal' button. The 'Add Performance Goal' button is highlighted with a red box. The table lists two employees: Testuser_Baylor_s (Administrative Assistant) and Testuser_Baylor_s49 (Graphic Designer I). Both employees have checkboxes checked, which are also highlighted with red boxes. The table includes columns for Last Updated Performance Rating, Performance Documents, Check-Ins, Performance Goals, Anytime Documents, and Potential Rating.

2. In the **Selected Employees** popup, ensure **Allow worker to update key attributes** is checked to allow your direct report to be able to edit or update the goal. You can also assign the goal to yourself or indirect reports at the same time.

Selected Employee

The screenshot shows the 'Selected Employee' popup with two employees listed: Testuser_Baylor_s (Administrative Assistant) and Testuser_Baylor_s49 (Graphic Designer I). Below the list are two checkboxes: 'Include myself' and 'Include all indirect reports', both of which are highlighted with a red box.

Basic Info

The screenshot shows the 'Basic Info' section with a 'Goal Name' input field and a checked checkbox for 'Allow worker to update key attributes', which is highlighted with a red box.

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3. Scroll down to view Basic Info. In this step, you will add goal details. Complete the following optional and required fields:

Basic Info

*Goal Name Allow worker to update key attributes

Description

*Start Date Status

Target Completion Date

Success Criteria

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4. After completing all of the required fields, scroll to the top of the page and click **Save and Close** in the top right-hand corner to create the team goal.

Add Performance Goal

Save and Close

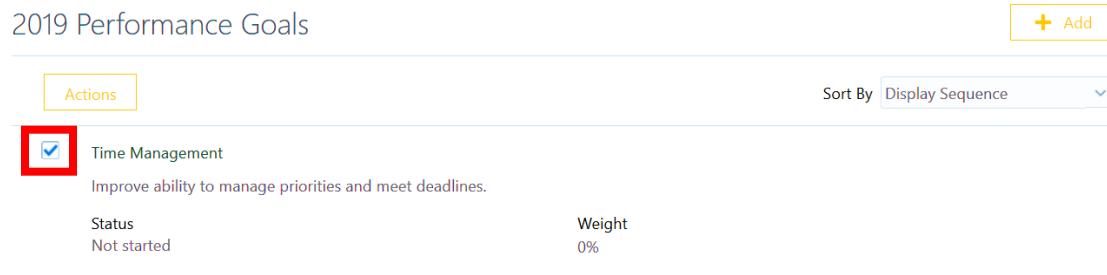
Cancel

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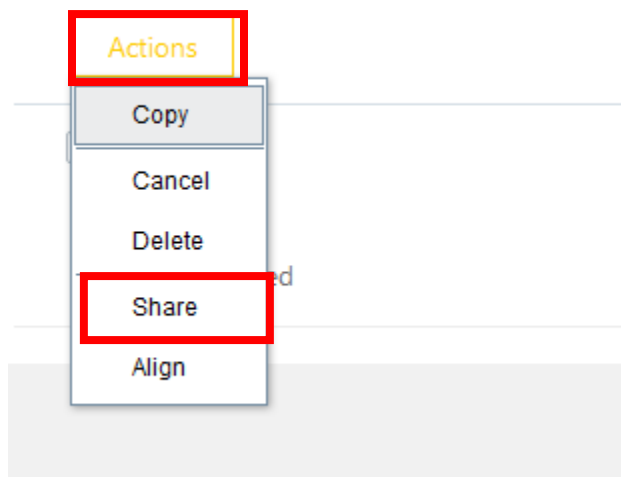
5. Share Manager Goals with Direct Reports

Sharing a Goal: A manager can share a goal with another employee as a suggestion. The recipient will find the shared goal in their Goals Shared with Me area, where they can choose whether or not to add it to their goal plan. If they choose to add it to their goal plan, it will be submitted back to you for approval.

1. On the main page, select **Career and Performance** under the **Me** tab and then select the **Goals** tile. When the **Goals and Performance** page opens, share a goal by selecting the checkbox next to the goal name of the goal you wish to share.



2. Select **Share** from the **Actions** drop down. Note: You can also **Cancel** or **Delete** goals from this screen.



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3. Decide who to share the goal with. Direct reports who will auto populate, however, you can share with anyone. Select a worker from the dropdown or type the name in manually. Then check the task box and the worker box.

Selected Goals

Time Management

Share tasks

Share Goals With

Add Worker



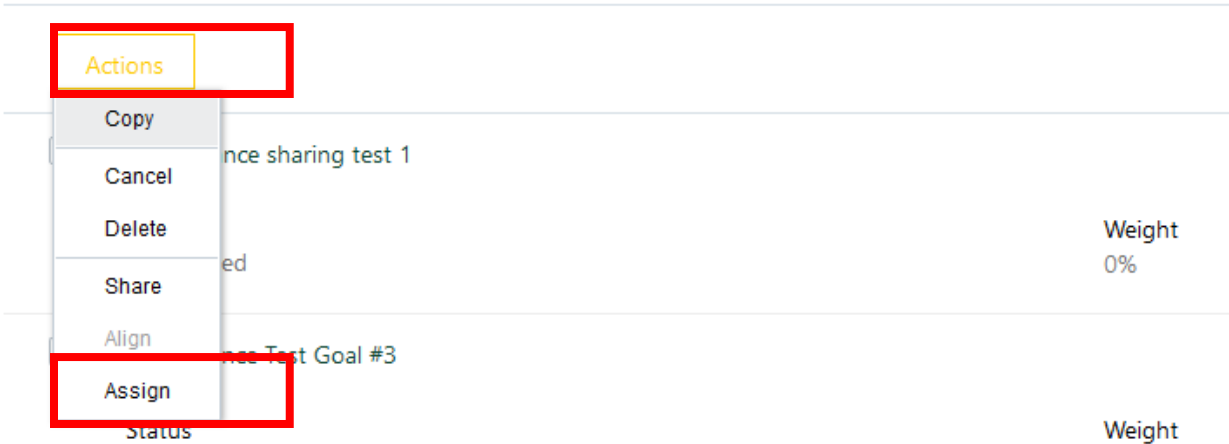
Ms. Zoe Nagle
Manager, Compliance

4. Click the **Submit** button.

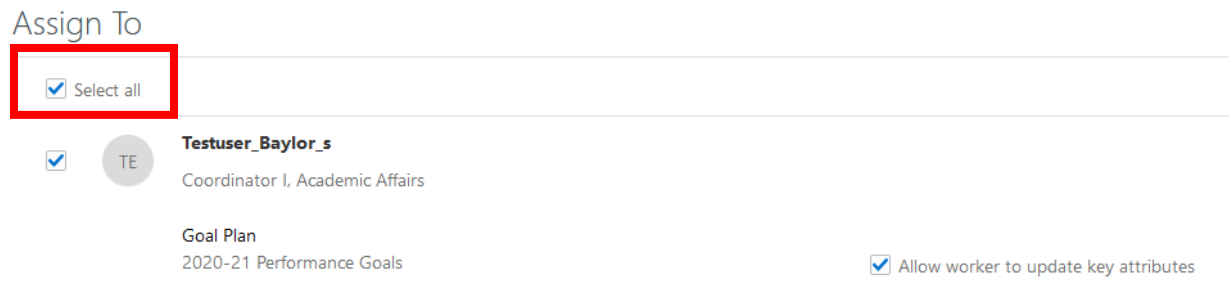
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6. Assign Manager Goals to Direct Reports

Assigning Goals: A manager can assign goals to members of their team, adding it to their employee's goal plan. Unlike sharing a goal, assigning a goal will add it directly to the recipient's goal plan. The process is the same as **Sharing Goals** above, except **Assign** is selected under **Actions**.



Also, a manager can assign a goal to their entire team by checking the **Select All** box or to specific employees by selecting them individually.



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7. Cancel or Delete a Direct Report's Goals



As manager, you can cancel or delete goals on your employee's goal plan. Canceling goals leaves them visible on the goal plan, but they cannot be managed, edited, aligned, or assigned. Deleting will remove the goal from the goal plan, but once deleted it cannot be recovered from the system. Note: that you will only be able to delete goals you have added. The employee will have to delete goals he or she has added.

1. Navigate to the **Career and Performance** tab under **My Team**. This action is detailed in the first process of this document.
2. On the **Goals and Performance Overview** page, find the employee and click on the hyperlink under **Completed Goals**. This will take you to the specific employee's goal page.

My Team

Search Person Show Filters

Add Performance Goal Sort By Name ascending

<input type="checkbox"/>	 Testuser_Baylor_s48 ...
Last Updated Performance Rating	Performance Goals
Area of Mastery	0 of 1 completed
Performance Documents	Anytime Documents
 2021 Staff Annual Evaluation	0 created
Check-Ins	Potential Rating
0 created	Medium

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3. Select the checkbox next to the goal name, and click the **Actions** button from the drop-down menu. Then click **Cancel** or **Delete**.

2020-21 Performance Goals

Actions

Priority Management

Status
Not started

2020-21 Performance Goals

Actions

Copy

Cancel

Delete

Align

Management

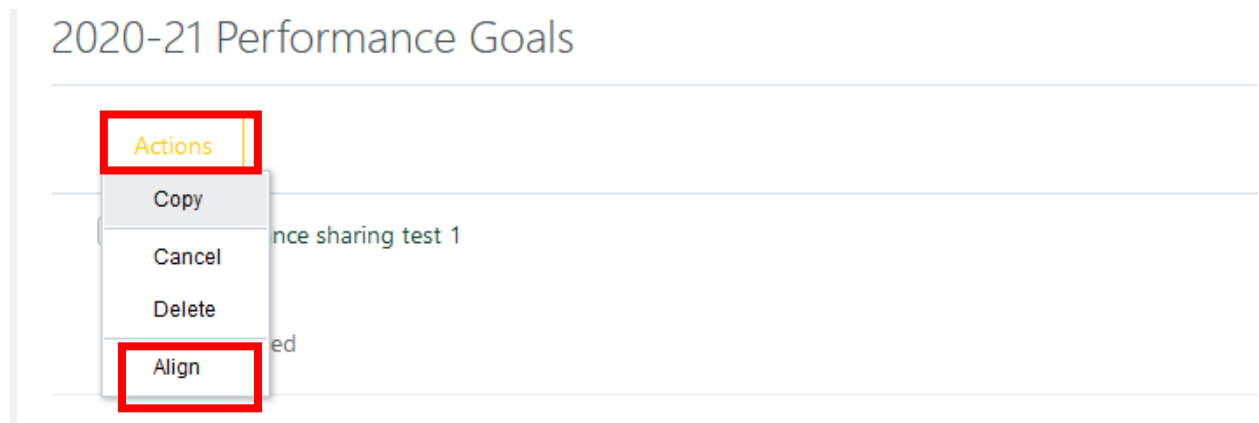
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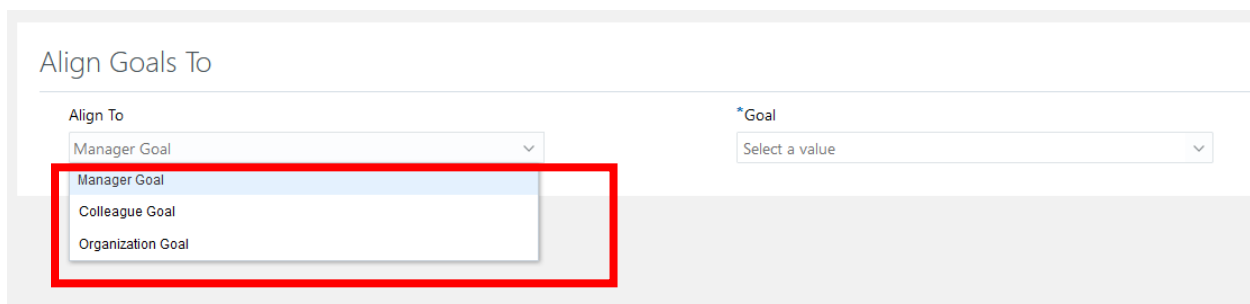
8. Align a Goal for a Direct Report

Aligning Goals: A manager can align an employee's goal to one of the Manger's, a Colleague's, or an Organizational goal. Aligning goals makes it easier for the manager to track multiple employees' goal progression as well as track an entire organization's progress towards a goal.

1. Follow the steps in the previous section.
2. To align a goal, select the checkbox next to its name, and click the **Actions** drop-down. Click **Align**.



3. In the **Align Goal Page**, select whether it is being aligned to Manger, Colleague, or Organization goal and then the Goal name. Click **Save and Close**.



4. The employees' goal has successfully been aligned.