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.

Contents

1. Approve Goals Using the Bell Notification ................................................................. 2
2. Approve Goals Through Career and Performance in My Teams ...................................... 5
3. View/Manage/Edit Direct Reports’ Goals ................................................................. 7
4. Create Goals for Individual or Multiple Employees .................................................. 9
5. Share Manager Goals with Direct Reports .............................................................. 11
6. Assign Manager Goals to Direct Reports ............................................................... 13
7. Cancel or Delete a Direct Report’s Goals ............................................................... 14
8. Align a Goal for a Direct Report ............................................................................. 16
1. 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.

![Bell Notification Icon]

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

![Pending Notifications]

3. Alternatively, you can click on the name of the alert to see more details.
4. 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.
5. Click **Submit**. Note, although you have the option, there is no specific need to include attachments. In most circumstances, we recommend not including attachments when approving goals.
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.
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**.
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.

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.

---

**Goals and Performance Overview**

- **Review Period**: 2021 Annual Review
- **My Team**
  - **Search Person**: 
    - **Show Filters**
    - **Sort By**: Name ascending

- **TE**: Theater, Baylor, #48
  - **Marketing Communications Specialist III**
    - **Last Updated Performance Rating**:
    - **Performance Goals**: 0 of 6 completed
    - **Anytime Documents**: 0 created
    - **Potential Rating**:

---

**2020-21 Performance Goals**

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
</table>

- **Priority Management**

<table>
<thead>
<tr>
<th>Status</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not started</td>
<td>0%</td>
</tr>
</tbody>
</table>
4. To edit the goal, click the **Edit** button.

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**

<table>
<thead>
<tr>
<th>Goal Name</th>
<th>Priority Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Not started</td>
</tr>
<tr>
<td>Start Date</td>
<td>06/01/2020</td>
</tr>
<tr>
<td>Weight</td>
<td>0%</td>
</tr>
<tr>
<td>Target Completion Date</td>
<td>05/07/2021</td>
</tr>
<tr>
<td>Source</td>
<td>Manager</td>
</tr>
<tr>
<td>Last Update</td>
<td>Testuser_Baylor_547 07/11/2020</td>
</tr>
</tbody>
</table>

---

**Goal Details**

- **Goal Name**: Priority Management
- **Description**: [Description field]
- **Start Date**: 06/01/2020
- **Target Completion Date**: 05/07/2021
- **Category**: [Select a value]
- **Success Criteria**: [Success criteria editor]
- **Status**: Not started
- **Weight**: 0

---

[Save button]
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**.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>Status</td>
</tr>
<tr>
<td>08/17/2021</td>
<td>Not started</td>
</tr>
<tr>
<td>Target Completion Date</td>
<td></td>
</tr>
</tbody>
</table>

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.
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.
Approving and Managing Employee and Team Goals

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

<table>
<thead>
<tr>
<th>Time Management</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="on" alt="Share tasks" /></td>
</tr>
</tbody>
</table>

Share Goals With

- [x] Add Worker

- ZN
  - Ms. Zoe Nagle
  - Manager, Compliance

4. Click the **Submit** button.
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.
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.
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**

- **Priority Management**
  - Status: Not started
8. Align a Goal for a Direct Report

**Aligning Goals**: A manager can align an employee’s goal to one of the Manager’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 Manager, Colleague, or Organization goal and then the Goal name. Click **Save and Close**.

4. The employees’ goal has successfully been aligned.