



For Managers: Adding Goals to an Employee's Performance Plan Job Aid

- 1. Verify the performance plan is in "Draft" status.**

To add goals to a performance plan, the template must be in the "Draft" status. You can check the status of the template by looking at the "Status" notification under the "General Information" heading. If the status shows "Not Started," you must change it to "Draft" by clicking "Pause Evaluation" on the menu bar.
- 2. Locate the "Content" heading.**

Once you find the "Content" heading, click on "Goals/Responsibilities."
- 3. Add goals.**

In the "Goals/Responsibilities section, click "Add Items." Then, select "New Goal" from the drop-down menu. A dialogue box will open where you will then add the goal's details.
- 4. Input goal details.**
 - a. Add "Goal Name"
 - b. Add goal "Description." Provide details that will inform the employee about what is required, criteria for success, data about quantity and quality if needed, and any time-bound requirements.
 - c. Add the "Due Date."
 - d. Select "Category" from the list that matched the goal. For example, if you add a customer service goal, select "Customer Service" from the category list.
 - e. Click on "Reminder Settings" and turn reminder on or off to meet your needs.
 - f. Click "Save."
 - g. Repeat the process to add additional goals.
- 5. Click "Start" at the top of the page to activate the plan.**

