ePerformance: Goal Setting Quick Start Guide

This Quick Start provides basic instruction on performance management in PeopleSoft for entering your goals:

General Document Process Flow between You and Your Manager

<table>
<thead>
<tr>
<th>You…</th>
<th>Manager…</th>
</tr>
</thead>
</table>
| 1  • Meet with manager to discuss your goals for the upcoming FY.  
   • Enter your goals in Set Goals.  
   • Notify your manager that it is ready for review. | 2  • Reviews and edits your goals.  
   • Sets up meeting with you to review/finalize your document. |
| 3  • Meet with your manager to review document.  
   • Make final edits to the document. | 4  • Reviews and makes final edits to goals  
   • Marks your goals complete. |

A change occurs to your goals during the year:

<table>
<thead>
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<th>You…</th>
<th>Manager…</th>
</tr>
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<tbody>
<tr>
<td>1  • Tell your manager you want to edit your goals.</td>
<td>2  • Reopens document.</td>
</tr>
</tbody>
</table>
| 3  • Make edits.  
   • Notify your manager edits are ready for review. | 4  • Reviews/edits and marks the goals complete. |

Access your performance document to enter goals:

1. Click the My Performance tab from the PeopleSoft homepage.
2. Click on the current (open) document you want to access.

Goals tab | Organization Goals, Job and Performance Goals, and Professional Growth and Development Goals

3. Click > Expand to review Organizational Goals, if applicable.
4. Click “Add a …. Goal.”
5. Select to either “Add your own goal” or “Select from document”
   a. Enter all applicable goal fields if adding your own goal, OR
   b. Select the document and goal(s) to add.
6. Edit or delete the goals as needed. You can also add a note to your goal, which can brought into your self-evaluation.
Competencies tab | Core Competencies, Additional Competencies

7. Click > Expand to review detail on the Core Competencies.

8. Add Additional Competencies by clicking Add a Competency.
   a. Click “add predefined item” to search for and select the competencies, OR
   b. Click “copy items from My documents” to select competencies used in previous annual review documents.

   Click the Competency Dictionary for a full description of all university-wide competencies.

Feedback tab | Feedback from Peers/Colleagues, Feedback from Direct Reports – Part I, Part II

9. (optional): review the questions that may be asked if feedback during the annual assessment is collected through PeopleSoft.

10. Click Save, located in the top-right of the page.

11. Notify your manager directly or click Notify to send an email directly from PeopleSoft to your manager. The email will contain a direct link to your goals.

Need More Help?

- Review the detailed work instruction: Performance Management: Employee Goal Setting Document
- Take the online course: The Performance Management Process

If you still have questions after reviewing this information, please contact your local HR office.