What’s Covered: This document provides step-by-step instructions on how to review and complete goals on the Set Goals section of an annual performance document for an employee. For more high-level information on the process, see the Employee Goal Setting Document Quick Start guide.

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University Performance Management Process
For more information on Harvard’s performance management process, complete The Performance Management Process online course.

Performance Planning using PeopleSoft
Planning is the first phase of the Performance Management Process. It includes unit and department-wide goals (if applicable), as well as individual goals. Individual goals include job and performance goals, professional growth and development goals, and the competencies needed to successfully achieve these goals. The Set Goals section of the ePerformance annual document is used to capture the details of this planning process. This document does not replace the face-to-face planning meetings you should be having with your employee(s).

You and your employee can follow these guidelines when completing the planning phase:
1. Your employee enters their goals in the Set Goals section of the performance document.
2. You and your employee meet and discuss the goals.
3. If edits are needed, either you or your employee can continue to update the document.
4. You review/edit the Set Goals, and mark it complete.

If edits are required before the start of the assessment phase, you can reopen the goals, then either you or your employee can make the edits. Once the edits are done, you will need to again mark the goals Complete.

*Please follow your local school/unit’s timeframes for the various phases of the performance management process.
Navigating to Your Employees Performance Document(s)

Access your employees’ performance documents from the **Team Performance** tile on the PeopleSoft home page:

The **Performance** page defaults to the **Current Documents** page. Click anywhere on the row of the employee’s open document you want to access. To confirm which document you want to access, review the **Document Type**, **Document Status**, and **Period Begin/Period End**.

**Other Pages associated with your My Performance tile:**

- **Historical Documents**: review your employees’ performance documents that have been completed (prior-year)
- **Enter Preliminary Ratings**: entered as part of the assessment phase.
- **Maintain Performance Notes**: a tool that allows you to write confidential notes about your employee(s) throughout the year. You can pull these notes directly into your employee’s Evaluation during the assessment phase.
- **View-Only Documents**: includes historical documents as well as view-only access to documents (goals, employee, and manager evaluations only) for indirect reports as well as the documents employees may have had under previous managers.
Once in the document, use the left-side **Work Center** to orient where you are in the process. During the goal-setting phase, only the “Set Goals” section will be open to “Update and Complete.” The other areas will become available later in the performance cycle. Once the goals have been set, you must click the **Complete** button in the top-right section of the page. You can re-open the goals for you/your employee’s edits at any time before the assessment phase.

The performance document is divided into three tabs: **Goals**, **Competencies**, and **Feedback**. Click the **Long Format** link to display all sections. Buttons in the top-right of the screen allow you to save your goals, render the document to PDF (Print), email the manager listed on the document (Notify), and export to Word (Export).

**Copy Goals and Competencies from Other Documents**

As a manager, you can copy in goals and competencies from not just your employee’s other documents but from any performance document that you are listed as the Manager. Copying a goal or competency from a different document has two basic steps: (1) select which employee and document to copy from, and (2) select the goals you want to add.

1. Depending on which section you want to copy a goal from, click **Add a Job and Performance Goal**, **Add a Professional Growth and Development Goal**, or **Add a Competency**.
   a. **Note**: you can only copy in items associated with applicable section – for example, you can only copy Job and Performance Goals into the Job and Performance Goals section.
ePerformance: Goal Setting, Manager Tasks

2. Click **Copy Goal [or Item] from My Team's Documents.**

3. Click **Select** associated with the document you want to copy goals/competencies from. If desired, use the **Filter Criteria** selections to narrow the results.

4. Select the goal/competencies you want to add, then click **Copy**.

5. The goal/competencies are added to your current **Set Goals**, and can be edited or deleted as needed.
Completing the Goals Sections

Organizational Goals

Organizational goals represent the planning that has been done at school and unit levels and support their priorities. These goals cannot be updated.

*Note: This view-only section displays only if your school/organization has defined its organizational goals in PeopleSoft.*

You or your employee can link your individual goal to a specific organization goal if your school/unit has defined organizational goals.

Use **Expand** to view the detail of all goals or click ![example](image.png) each one.

Job and Performance Goals

Job and performance goals identify the work that needs to be completed in the year. Review and update your employees’ job and performance goals to ensure that they are **S-M-A-R-T**:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>S</strong></td>
<td>Specific – What results are to be achieved.</td>
</tr>
<tr>
<td><strong>M</strong></td>
<td>Measurable – To know when success has been achieved.</td>
</tr>
<tr>
<td><strong>A</strong></td>
<td>Aligned – How it fits into the big picture and the organization.</td>
</tr>
<tr>
<td><strong>R</strong></td>
<td>Realistic – To be sure the employee has the resources, skills, and time necessary to complete the task.</td>
</tr>
<tr>
<td><strong>T</strong></td>
<td>Timebound – To know by when it should be completed.</td>
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</tbody>
</table>

Review/Edit Your Employee’s Job and Performance Goals

Click **Expand** to review the employee’s goals. To make changes, click the edit icon ![edit](image.png). You may also delete the goal ![delete](image.png) or add a confidential note to it ![note](image.png). Notes can only be viewed by you, and you can pull them into your evaluation of the employee during the assessment phase.

If desired, add a new goal by clicking **Add a Job and Performance Goal**, then selecting “Add your own goal.”
1. Edit any of the following sections:
   a. Job/Performance Goal Title (60-character limit) (Required)
   b. Description (1325-character limit)
   c. Measurement
   d. Organizational Goals alignment, if applicable
   e. Due date
   f. Stretch goal indicator
   g. Use of spell-check is also recommended.

2. Click **Update** to save your entries and return to Set Goals, or click **Return** to without saving the entry.

3. Once you return to Set Goals, click **Save** in the top right section of the page. PeopleSoft has some capacity to auto-save, but it is recommended to continue to save your entries as they are added/edited.

### Professional Growth and Development Goals

Professional growth and development goals identify individual development needed to successfully achieve job and performance goals, as well as other needs of the current position or the department. Click the “here” link to access the Harvard Training Portal and review your employee’s training history.

### Review/Edit Your Employee’s Professional Growth and Development

Click **Expand** to review the employee’s goals. To make changes, click the edit icon -pencil. You may also delete the goal -trash or add a confidential note to it -chat_bubble. Notes can only be viewed by you, and you can pull them into your evaluation of the employee during the assessment phase.

If desired, add a new goal by clicking **Add a Job and Performance Goal**, then selecting “Add your own goal.”
1. Edit any of the following sections:
   a. Title (60-character limit) (Required)
   b. Description (1325-character limit)
   c. Due Date

2. Click Update to save your entries and return to Set Goals, or click Return to without saving the entry.

3. Once you return to Set Goals, click Save in the top right section of the page. PeopleSoft has some capacity to auto-save, but it is recommended to continue to save your entries as they are added/edited.

Core Competencies

Competencies are the knowledge, skills, and abilities that represent “how” work gets done. This section lists the core competencies on which you will evaluate your employees. These competencies have been identified by the University and your school and cannot be changed.

The competency sections display in the Competency tab. Click Expand to see a description of each competency and add note if applicable.

Additional Competencies

Both you and your employee can include additional competencies that support your employee’s job and performance goals. These competencies will also be rated as part of the annual assessment. Click the Competency Dictionary link to review the full definition of each competency. As the manager, you can add or delete competencies in this section. You can also associate a note to a competency.
1. Click **Add a Competency**.
2. Select “Add my own item,” then click **Next**.
3. Enter the name or partial name of a competency and click **Search**, or leave the field blank to return all.

All available competencies appear in the **Search Results**.

4. Check the competency(ies) you want to add.
5. Click **Add**, or click **Return** to return without saving your entries.
6. Click **Save** in the top right section of **Set Goals**.

**Feedback from Other Reviewers**

The feedback sections display in the Feedback tab. These are questions that will be sent to other reviewers during the Assessment phase of the review cycle. Click **Expand** to view, delete [ ], or add a note [ ] to each question. Click **Add a question for Other Reviewers** to select an additional question or add your own.
Feedback from Direct Reports - Part I & II (manager documents only)

For employees who have direct reports, the Goal Setting Document includes two additional sections to gather feedback during the assessment period. Employees can rate managers’ effectiveness in several areas. Click Expand to see the full list and descriptions.

Notifying Your Employee that the Goal Setting Document is Updated

You can use PeopleSoft to notify your employee if you update the Set Goals prior to meeting. Click Notify, enter a message, and click Send.
Completing the Goal Setting Phase

After you review and update the Goal Setting Document, click Complete in the top-right section of Set Goals, then click Confirm. You can reopen the goals to enable editing, at any time until the Assessment phase begins.

Reopen the Goals

After you mark the goals as complete, the Steps and Tasks section will display “Set Goals” as complete. The next time you access your employee’s document, the Manager Evaluation will display (it will include goals).

From the Steps and Tasks:

1. Click Set Goals.
2. Click Reopen.
3. Click the Reopen button in the top-right section of the page, then click Confirm and OK.
4. Once all the edits are made, be sure to again Complete the set goals.

You will have the ability to Select Reviewers and begin working on the Manager Evaluation, if needed. However, it is not recommended to start until the assessment phase of the performance process.
## Frequently-Asked Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who can see the data in my employees’ performance documents?</td>
<td>Security is built into the PeopleSoft performance management system. Only the manager or designated manager who is completing the performance management document can see the data.</td>
</tr>
<tr>
<td>Can I copy goals from one annual review cycle to the next?</td>
<td>Yes! You have the option to select goals and competencies from other documents by clicking “Copy Item from My Documents” when you go to add a goal or competency. When copying a goal or competency, you can select from any of your employees’ documents.</td>
</tr>
<tr>
<td>My group usually adds goals for the next fiscal year during the assessment phase. Will that be possible in this system?</td>
<td>Yes, you and your employees will be able to add goals for the next fiscal year to the Set Goals for the next fiscal year during the assessment phase for the current fiscal year.</td>
</tr>
<tr>
<td>My school does mid-year reviews. How will that impact the Set Goals for my employees?</td>
<td>Mid-Year reviews, or “check-ins,” may be available starting with fiscal year 2018. For 2017, check with your manager or HR on your area’s mid-year process.</td>
</tr>
<tr>
<td>Can I or my employees update goals and competencies and add new ones throughout the annual review cycle?</td>
<td>Yes. After a document is complete, you can reopen the document for editing until the assessment phase begins.</td>
</tr>
<tr>
<td>Some of my employees have more than one manager. Can those managers input to their Goal Setting documents?</td>
<td>Additional supervisors can input to the planning process outside the PeopleSoft system. You can also add input from additional supervisors to the document.</td>
</tr>
<tr>
<td>What happens to my employee’s document if she transfers to another school or department?</td>
<td>Your HR administrator can transfer the document to the new manager, but whether this occurs depends upon your school or unit’s policies and the timing of the transfer in the annual review process.</td>
</tr>
<tr>
<td>Is there a way that my employee can identify the edits I make to the document?</td>
<td>The system does not track the changes you make in Set Goals. If you want your employee to identify your edits, advise her to print the goals notifying you that the document is ready for review. After you update the document, the employee can compare the two versions.</td>
</tr>
<tr>
<td>What happens if my employee is on leave and cannot complete the Set Goals in the allotted time period?</td>
<td>The Goal Setting document is not required in the annual review cycle. If your employee cannot complete the document for any reason, contact your local HR office.</td>
</tr>
</tbody>
</table>