Planning Phase: Creating Goals and Other Goal Actions

The Planning Phase

Performance goals are created and assigned typically at the beginning of the performance year. Goals may be created or edited at any point during the performance year.

During this phase, supervisors should:

• Set and Assign goals
• Discuss competencies
• Complete a Performance and Development Plan
• Conduct Performance Planning discussion

Note: While creating goals usually occurs at the beginning of the performance cycle, goals can be created at any point during the performance cycle.

Creating/Assigning Goals
If you have the proper permission, you can create goals and assign them to your direct reports. Administrators may also have the ability to assign goals across the organization by specific users, work unit, or the entire institution. Assigning goals allows you to set appropriate and SMART goals for each of your employees. The process for assigning goals is the same process you will follow for creating goals for yourself, but during the final step, the ‘Assign’ step, you will select one of your direct reports. Once this goal is assigned, it will appear in the ‘My Goals’ tab on the goals main page for that employee. This goal may also appear in their performance review.

Creating Goals

• Click the MY TEAM tab
• Select Employee from the list of ID cards of your direct reports
• In the module to the right, select the Performance tab and then click the Goals sub link
• An ACTIONS drop-down list displays along with a list of the direct report’s existing goals if they have any
• Click on the Actions drop-down list, and select CREATE GOALS
The Create Goals box will open
- Complete the Goals Title, Goal Statement, Start and Due Dates
- Select Next

The Create Goals Assign Screen will open
- Select the Employee(s) to whom this goal should be assigned
- Click the Submit button

Editing Goals:
- Click the MY TEAM tab
- Select Employee from the list of ID cards of your direct reports
- In the module to the right, select the Performance tab and then click the Goals sub-link
- An ACTIONS drop-down list displays along with a list of the direct report’s existing goals if they have any
- Click on the Actions drop-down list, and select VIEW ALL GOALS
- The Goal page for employee will open
- Select goal to be edited by clicking on Edit icon
• Adjust the Goal Title, Goal Statement, Due Date as needed
• Select the **Submit** button to finalize the goal

**Viewing Team Goals**
The Team Goals tab of the goal's main page contains all of your direct reports' goals. When you select this tab, you can see each of your direct reports and their overall goal progress.

If you have no direct reports or if your direct reports do not have any goals in the specified date range, this tab will not appear.

Click the down arrow in the Options column next to an employee to view each of their goals. Goals in DRAFT status are not displayed.

**Goal Information**
Employees are listed in alphabetical order by last name. The following information may be displayed for each goal:

**Title** - Clicking the goal title allows you to view the goal details and manage the goal progress for your direct reports. If the goal is a shared goal, "(shared)" will display after the goal title. Clicking the title of a shared goal opens a read-only version of the Manage Goal page.

**Due Date**

**Progress** - This indicates the goal’s progress as a percentage. The color of the progress bar is determined by the goal status and can be modified by the system administrator.

**Options** - Here you have the ability to edit, copy, cancel, and advance goals. These options are detailed above in the Goal Actions section.

**Exporting Goals**
Clicking the 'Export to PDF' icon in the upper-right corner of the goals list will display a printable version of the Goal Details Report for all of the goals that are currently visible on the page. For any employees that are not expanded, their goals will not be included in the report.
Goal Actions
Manage Goal - Clicking the title of the goal opens the Goal Management page, where you can view goal details and update the status of the goal. See Managing Goals for additional information.

Results Final - Select this option to prevent the goal owner or anyone else from updating the goal progress. You may select this option at the end of the goal period or at the beginning of a review period. This prevents any miscommunication between the manager and employee.

Edit Goal - Depending on the preferences set by the system administrator, you may be able to edit your direct report’s goal by clicking the Edit icon next to the goal in the Options column. Shared goals cannot be edited by anyone other than the goal owner. Clicking the Edit icon will take you to the Edit Goals screen, where you can edit the details of the goal. This process is similar to creating a goal. See Editing Goals for additional information. If your goals require approval, editing and resubmitting an approved goal changes its status to Pending Approval and you must click the Send an Approval Request link on the Goals screen to send an email to the approver.

Copy Goal - You can copy any goal that has not expired by clicking the Copy icon next to the goal in the Options column, which takes you to the Create Goal - Align screen with all of the information copied from that goal. If alignment is not enabled, you are taken to the Create Goal - Set screen. This process is the same as creating a goal. See Creating Goals for additional information. If you are creating a goal for yourself and your goals require approval, once you click Submit, the status of your goal will be Pending Approval. You must click the Send an Approval Request link on the Goals screen to send an email to the approver. This goal will now appear in the My Goals section on the goals main page.

Cancel Goal - Depending on the preferences set by the system administrator, you may be able to cancel your direct report’s goal by clicking the Cancel icon next to the goal in the Options column. Shared goals cannot be canceled by anyone other than the goal owner. If you are canceling your goal and canceling goals requires approval, the status of your goal will be Pending Cancellation Approval as well as the progress status (On Track, Critical) and you must click the Send an Approval Request link on the Goals screen to send an email to the approver (if the corresponding email is active).

For More Information:

For further assistance with performance reviews or UR Talent Web, please contact Human Resources at URHR@richmond.edu or 289-8747. Future course offerings or tip sheets will be posted in UR Talent Web https://richmond.csod.com. Please check the website often to see what new information and courses are available.