

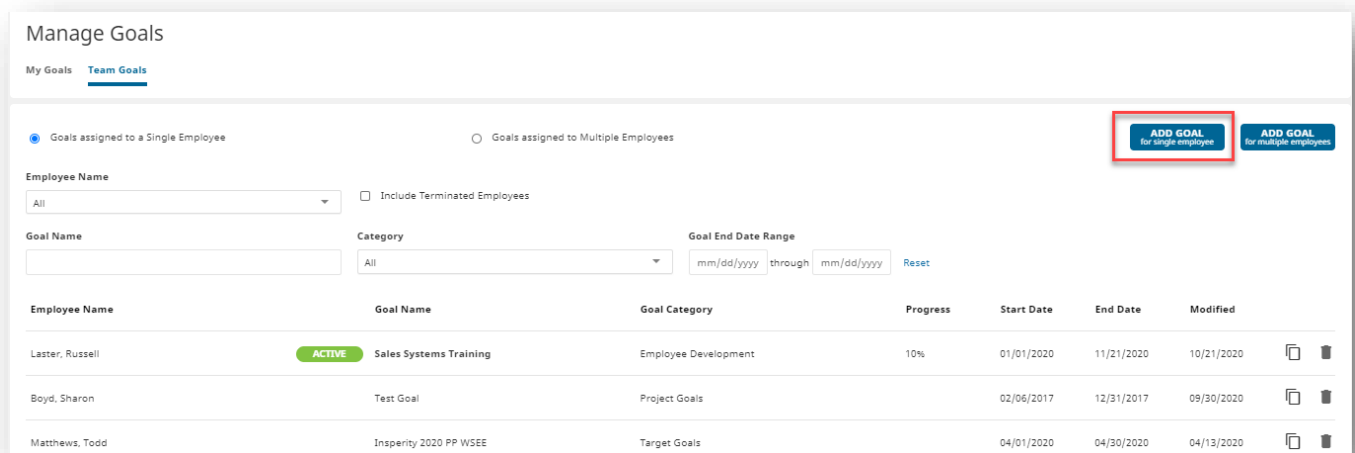
Quick Guide - Adding Goals for Your Employees

Navigation

NOTE: To be used prior to annual review cycle. Go to **Performance** in the left hand menu and click on **Goals**. To access your employee’s goals, click on **Team Goals**. To add a goal to a review that is in progress, see Adding Goals to a Review that is in Progress.

Adding Goal for a Single Employee

To add a goal for a single employee, go to **Performance** → **Goals**. Click on **Add Goal for Single Employee** button.



Manage Goals

My Goals **Team Goals**

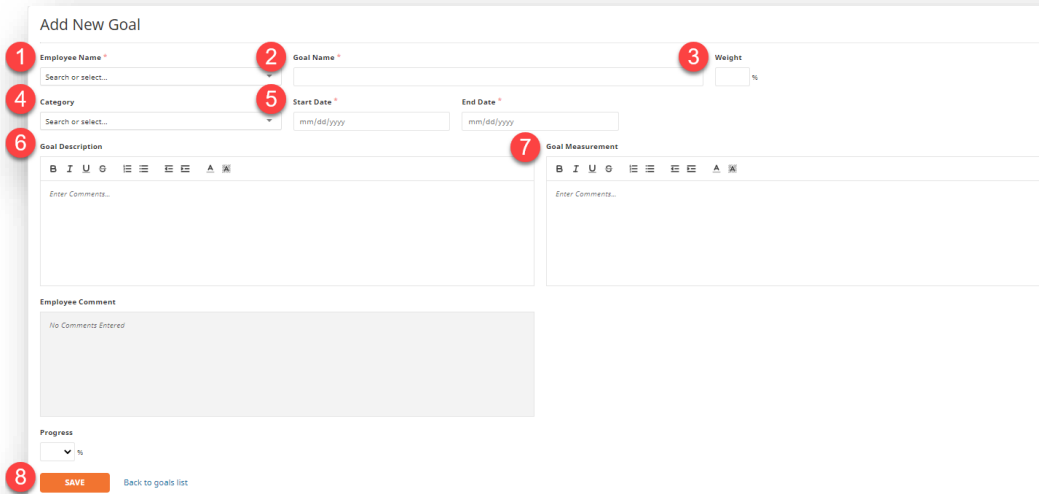
Goals assigned to a Single Employee
 Goals assigned to Multiple Employees

Employee Name:
 Include Terminated Employees

Goal Name:
 Category:
 Goal End Date Range: through

Employee Name	Goal Name	Goal Category	Progress	Start Date	End Date	Modified
Laster, Russell	ACTIVE Sales Systems Training	Employee Development	10%	01/01/2020	11/21/2020	10/21/2020
Boyd, Sharon	Test Goal	Project Goals		02/06/2017	12/31/2017	09/30/2020
Matthews, Todd	Insperity 2020 PP WSEE	Target Goals		04/01/2020	04/30/2020	04/13/2020

Enter the following Information:



The screenshot shows the 'Add New Goal' form with the following fields and callouts:

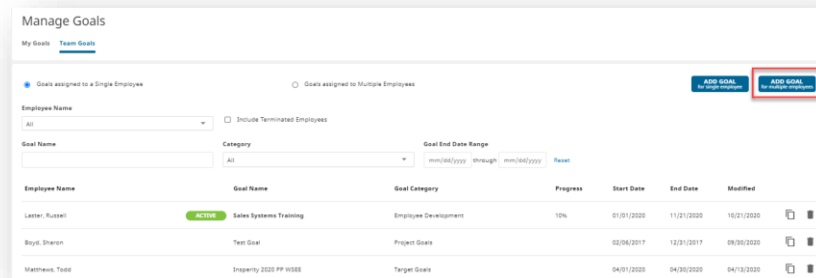
- 1** Employee Name * (Search or select...)
- 2** Goal Name *
- 3** Weight (input field with % sign)
- 4** Category (Search or select...)
- 5** Start Date * (mm/dd/yyyy)
- 5** End Date * (mm/dd/yyyy)
- 6** Goal Description (Rich text editor)
- 7** Goal Measurement (Rich text editor)
- Employee Comment (No Comments Entered)
- Progress (input field with % sign)
- 8** SAVE button and Back to goals list link

- 1** Select the **Employee Name** from the drop down box.
- 2** The **Goal Name** of the goal you would like to enter.
- 3** *Optional:* Choose a **Weight** you would like to assign to this specific goal to count towards their overall score. This is optional at this point of time; however each goal will need to be weighted in a performance review. The employee will have an opportunity to weigh the goal in the performance review at review time.
- 4** *Optional:* Select a **Category** for the goal.
- 5** You must enter a **Start Date** and an **End Date** for the goal. The **End Date** will determine which goal(s) will be added to a performance review based on the performance review period.
- 6** Enter a **Goal Description**.
- 7** Enter a **Goal Measurement**.
- 8** **Save** the goal.

NOTE: The employee or supervisor can edit and maintain this goal prior to or within the performance review.

Adding a Single Goal for Multiple Employees

To add a single goal for multiple employees go to **Performance** → **Goals**. Click on **Add Goal for Multiple Employees** button.



The screenshot shows the 'Manage Goals' page with the 'Team Goals' tab selected. Under the 'Goals assigned to Multiple Employees' radio button, the 'ADD GOAL for multiple employees' button is highlighted with a red box. Below this are filters for Employee Name, Goal Name, Category, and Goal End Date Range. A table lists existing goals for three employees: Lester, Russell; Boyd, Sharon; and Matthews, Todd.

Employee Name	Goal Name	Goal Category	Progress	Start Date	End Date	Modified
Lester, Russell	Sales Systems Training	Employee Development	10%	01/01/2020	11/01/2020	10/21/2020
Boyd, Sharon	Test Goal	Project Goals		02/04/2017	12/31/2017	08/30/2020
Matthews, Todd	Insperity 2020 PP WISE	Target Goals		04/01/2020	04/30/2020	04/16/2020

In Step 1, follow the instruction for adding a goal for a single employee as outlined above.

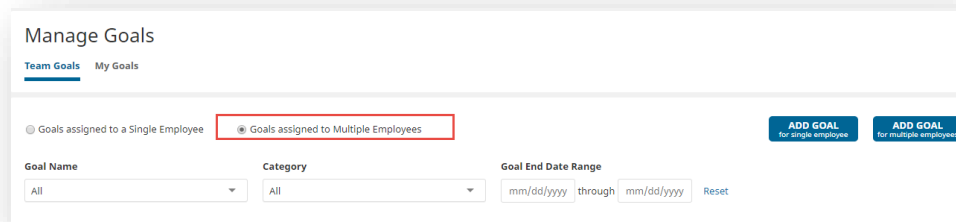
In step 2, select the names of the employees to be included in the goal.

Save the goal.


NOTE: The employees cannot edit these goals. Only the supervisor can edit and maintain this goal on behalf of the employees.

Managing Your Multi-Employee Goal

You can use the filtering tools in the middle of your screen to find a goal that has already been entered. Select **Goals assigned to Multiple Employees** and search for the name of the goal.



This screenshot shows the 'Manage Goals' page with the 'Team Goals' tab selected. The 'Goals assigned to Multiple Employees' radio button is selected and highlighted with a red box. The 'ADD GOAL for multiple employees' button is also visible. The filtering section below shows 'Goal Name' set to 'All', 'Category' set to 'All', and 'Goal End Date Range' set to 'mm/dd/yyyy through mm/dd/yyyy'.

The **delete** icon  allows you to delete the goal. Please note that you are not able to recover this goal once deleted. Deleting a goal will delete for all employees assigned to the goal.

The **copy** goal icon  allows you to copy the contents of a goal to a new goal for a single employee.

To **edit** the goal, click on the goal name and make necessary edits. The edits will apply to all employees with this goal.

To remove an individual employee from the goal assignment, uncheck the name in Step 2.

Step 2 - Select Employees

Employee: All Employees | Supervisor: Osborne, Mary | Position Title: All Position Titles | Organization Level: Services | Reset

Include Indirect Reports

<input checked="" type="checkbox"/>	Employee Name	ID	Supervisor	Position Title	Org Level
<input checked="" type="checkbox"/>	Boyd, Sharon	802302	Osborne, Mary	Implementation Analyst	Services
<input checked="" type="checkbox"/>	Gutierrez, Anna	802310	Osborne, Mary	Technical Support Analyst	Services
<input checked="" type="checkbox"/>	Kelly, Barbara	802307	Osborne, Mary	Implementation Analyst	Services
<input checked="" type="checkbox"/>	Labelle, Tonya	802308	Osborne, Mary	Implementation Analyst	Services
<input checked="" type="checkbox"/>	Laster, Russell	802303	Osborne, Mary	Technical Support Analyst	Services
<input checked="" type="checkbox"/>	Matthews, Todd	802305	Osborne, Mary	Implementation Analyst	Services
<input checked="" type="checkbox"/>	Minnick, Elizabeth	802309	Osborne, Mary	Technical Support Analyst	Services
<input checked="" type="checkbox"/>	Moore, Gregory	802306	Osborne, Mary	Technical Support Analyst	Services

1 - 8 of 8 items

Adding Goals to a Review that is in Progress

To add a goal to a review that is in progress, navigate to the **Current Goals** section in the Performance Review. Click **Add Goal** to create a current goal within the review.

Dashboard | Employee Review: Employee Not Started

Current Goals (Section Weight 25%)

Russell Laster | Overall Employee Rating: 0.00 - Not Rated | 2016 Annual Review: 01/01/2016 - 12/31/2016

View Notes

ADD GOAL +