GOAL SETTING AND TRACKING

Adding Goals for Your Staff member

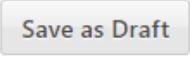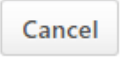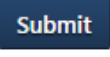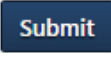You and your direct report should agree on the goals that will be entered into the system. Your direct report will be able to see the goals that you have submitted for them.

1) Select the Performance tab and choose Goals.
2) Select **Create** .
3) Enter goal Title and Description information.
4) Change Start and Due Dates, if necessary: The dates will default to the start and end dates of the performance cycle.
5) Upload any applicable attachments by selecting **Choose File** below Attachments. You can also add Attachments throughout the year.
6) To assign the goal to one of your direct reports, select the Your Team radio button.
7) Select the direct report to whom you would like to assign the goal
8) Select one of the following options:

   a. **Save as Draft** : Select if you are not yet ready to save the goal.

   b. **Cancel** : Select if you do not wish to save the goal.

   c. **Submit** : Select if you are finished drafting your goal and you want to save it. You must Submit the goal for your direct report to see it.

9) Once you select Submit, the goal will be displayed with an In Progress status on the Team Goals page under the Performance tab. Select the ＞ button next to a direct reports' name to show all goals assigned to that direct report.

Editing Goals

As priorities and schedules change throughout the year, you have the ability to edit your goals as necessary.

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the ＞ next to the appropriate direct report's name.
4) Click on the ▼ next to the appropriate goal, and select Edit.
5) Make the changes to the goal Title, Description, Start and Due Dates, Comments, or Attachments.
6) Select **Submit** .

Deleting Goals

Goals can be deleted throughout the year as you and your direct report see fit.

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the ❯ next to the appropriate direct report's name.
4) Click on the ▼ next to the appropriate goal, and select Cancel.

Changing Goal Progress for Your Direct Report's Goals

As your direct reports complete their goals throughout the year, you can update the Progress percentage that is displayed on the Team Goals page. *Updating the Goal Progress is not mandatory; it is an optional tool.*

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the ❯ next to the appropriate direct report's name.
4) Click on the progress bar to show how much progress your direct report has made on the goal.

Adding, Editing, and Deleting Comments

Career Pathway allows you and your direct report to write comments for a particular goal throughout the year.

You can use the Comments section to update the progress on a goal or track milestones. *Adding comments is not mandatory; it is an optional tool.*

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the ❯ next to the appropriate direct report's name.
4) Click on the ▼ next to the appropriate goal, and select Edit.
5) Select Add Comment under the Comments heading.
6) Enter your comment text and select Add .
7) Select Submit .
8) To edit your comment, select ▼ next to the comment and choose Edit. Edit the comment and then choose Save .
9) To delete your comment, select ▼ next to the comment and choose Delete. Be aware that once you delete your comment you cannot retrieve it.

Questions? Email hrperform@drexel.edu.