How to Edit and Add Goals
This guide is the print companion to the video tutorial, “How to Edit and Add Goals.” Additional instructional content for the Annual Performance Evaluation Process is available on the Annual Performance Evaluation webpage of the Human Resources website.

If you have other questions, please contact the Office of Human Resources via e-mail at humanresources@furman.edu.
In this staff member presentation, we will provide instruction on how to edit and add goals.

Previously, staff members could enter goals only as a part of a performance review. Moreover, they could not view those goals until the performance review was completed.

Now, staff members can add goals prior to the start of the performance review. They now can also view their current goals before the completion of the performance evaluation.
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Additionally, supervisors and unit heads can add goals for those within their line of supervision. More on this a bit later.

From the home page, click the Performance worklet.

Next, click "Goals."
From this screen you can see all goals that you have entered previously, including goals that have been entered by your supervisor or unit head.

Unit heads and managers can “cascade” goals to staff members within their supervisory line. Goals entered by a manager above your supervisor must be approved by your supervisor.

Goals entered by your immediate supervisor will not have a “Pending Approval” designation. To edit or add a goal, click “Edit.”
One may wish to edit a goal to write a better description, add a category (which is a new feature) update the status or due date. Click on the goal to be edited on the left side.

The shaded area on the left denotes the goal on the right to be edited. Click in the box to be edited and make the desired changes.

To add a goal, click “Add.”
Add a goal using the SMART goal format. A new feature for this evaluation period is that the goals can be categorized. Click in the Category box to show the category options.

Check the box next to the applicable categories. One or more may be selected.

Set the status of the newly entered goal "Incomplete" so that it will roll over into the performance evaluation when it is started."
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Provide a due date for this goal. If you wish to add another goal, click “Add.”

When finished, click “Submit.”

The process will route to your supervisors or review. Click “Done.”
Remember, all goals should be written in the SMART goals format. Also, all goals are subject to your supervisor’s approval.

Finally, the status of goals for the current evaluation year should be "Incomplete" or "Partially Complete" in order to roll over into the evaluation.

The SMART goals worksheet and instructions can be found on the Annual Performance Evaluation page on the Human Resources web page.
After your supervisor starts your evaluation, and you are ready to execute Step 3, those instructions may also be found on the Annual Performance Evaluation page on the Human Resources web page.

Thank you for reading. If you have questions, please send an e-mail to humanresources@furman.edu.