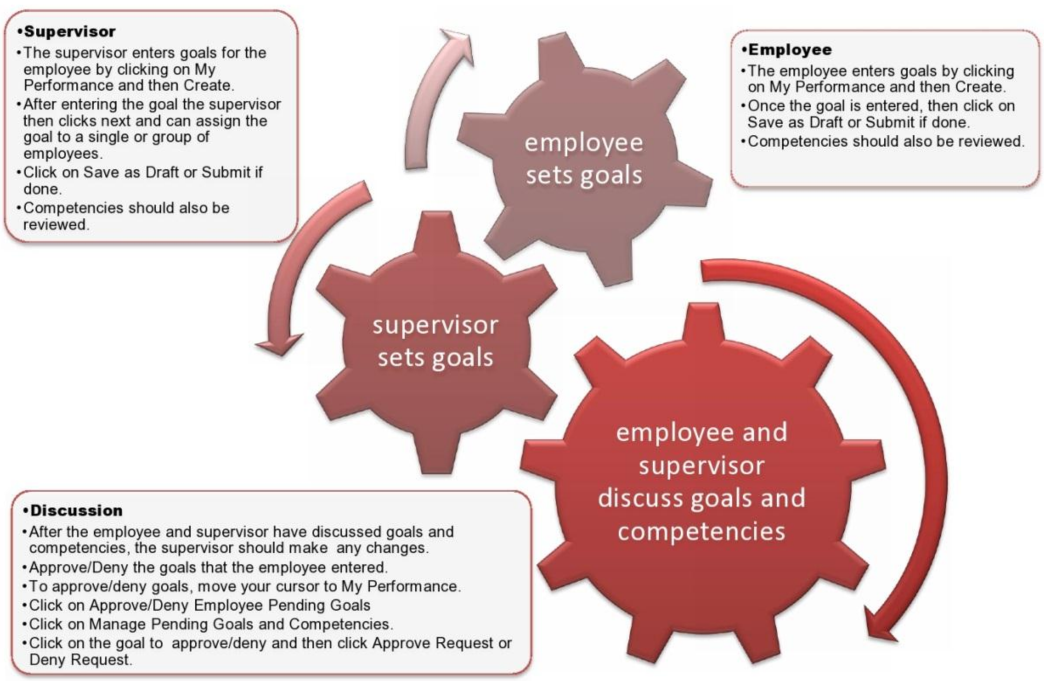
Additional Instructions for Goal Setting in Performance Development for Supervisors

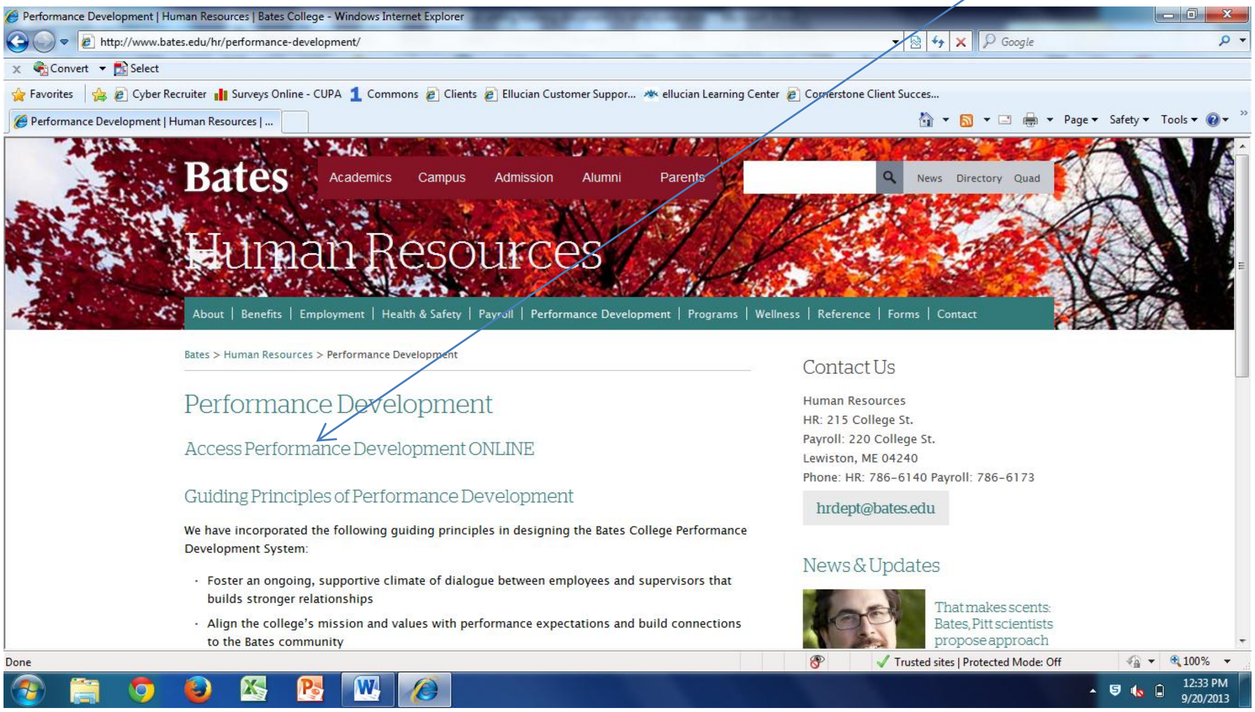


Steps to goal setting and competency review for supervisors.

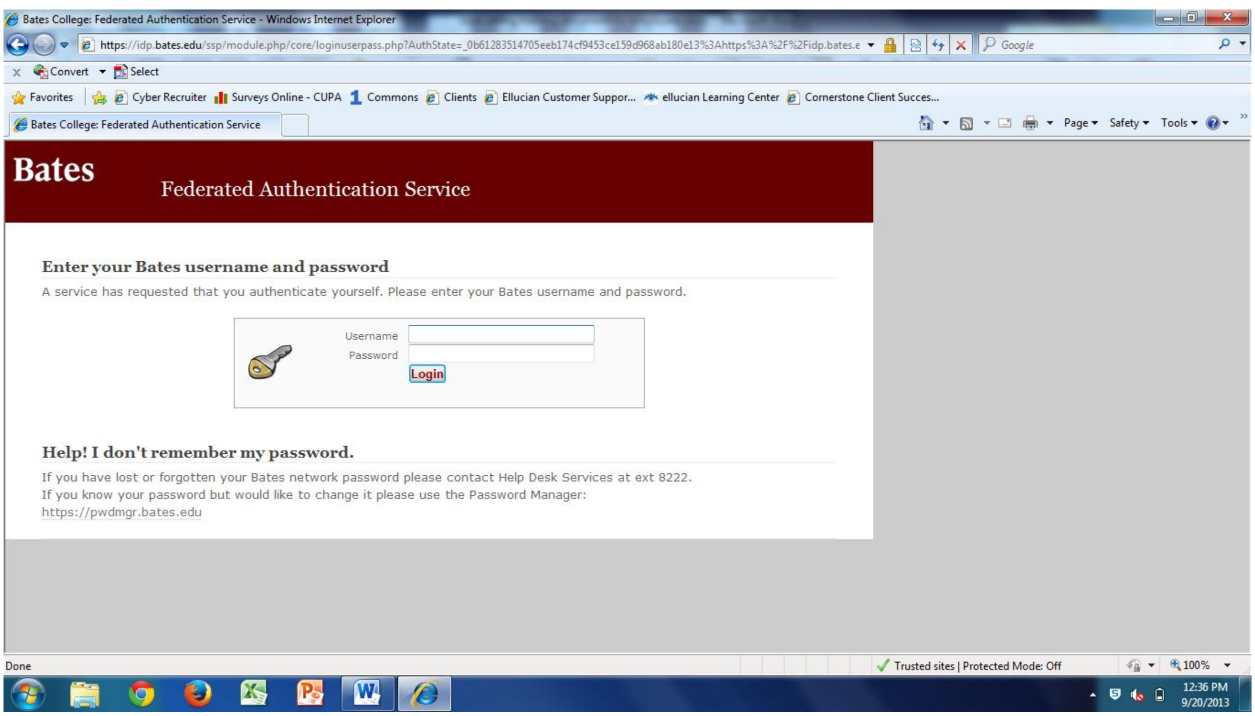
1. Enter goals for the review year.
2. Review competencies and add any comments.
3. Approve or deny goals submitted by your employee(s).
4. Meet with your employee(s) to discuss goals that you both have set and review competencies.

Complete this process by November 30.

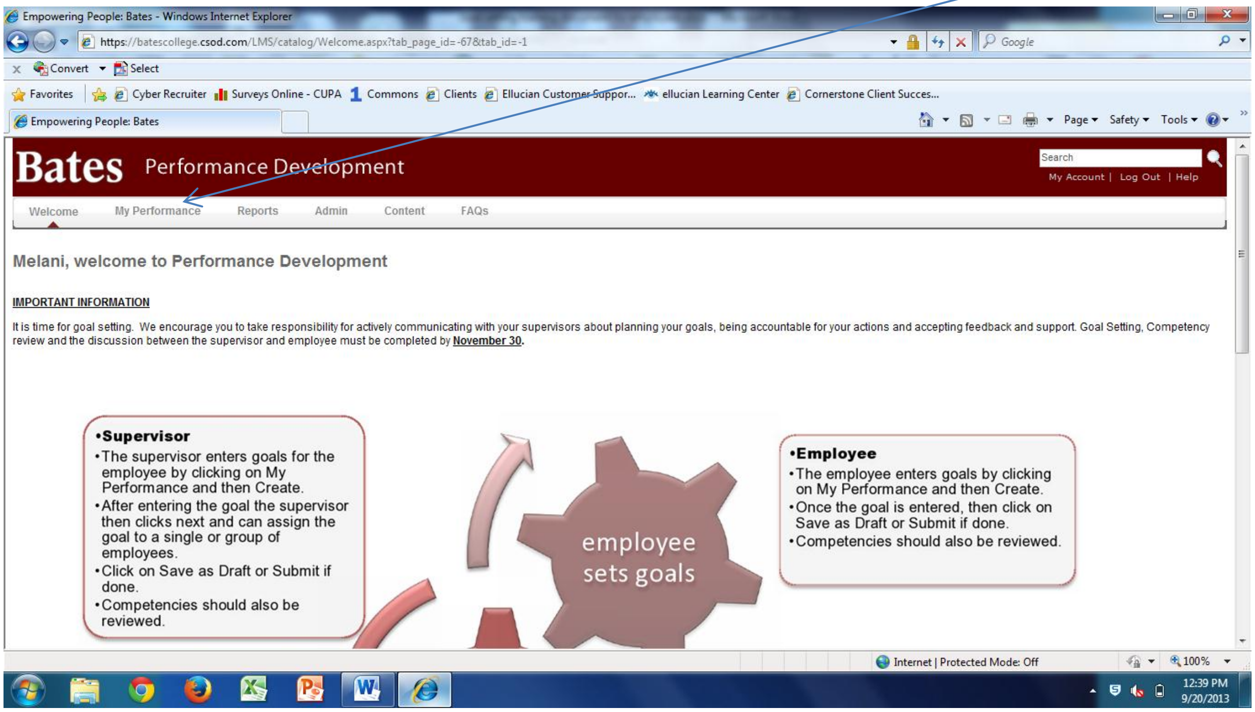
Go to the internet and enter www.bates.edu/hr/performance. Click on Access Performance Development ONLINE



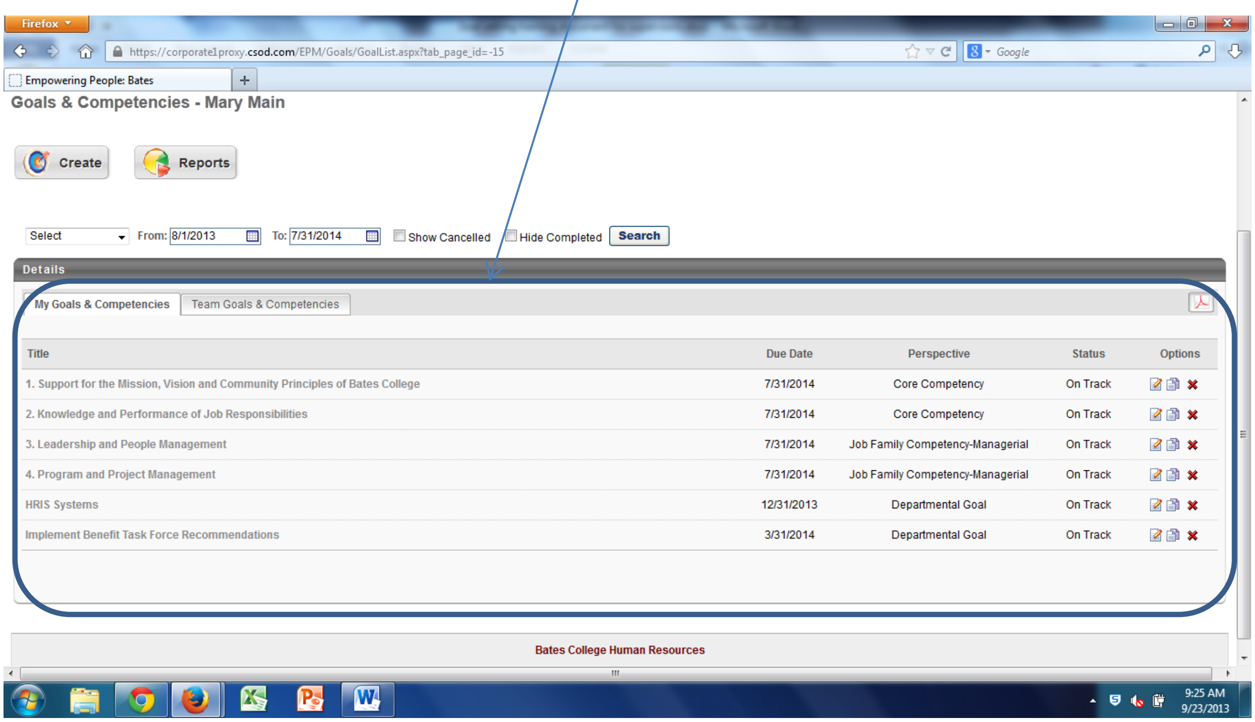
Log in with your network (email) username and password.



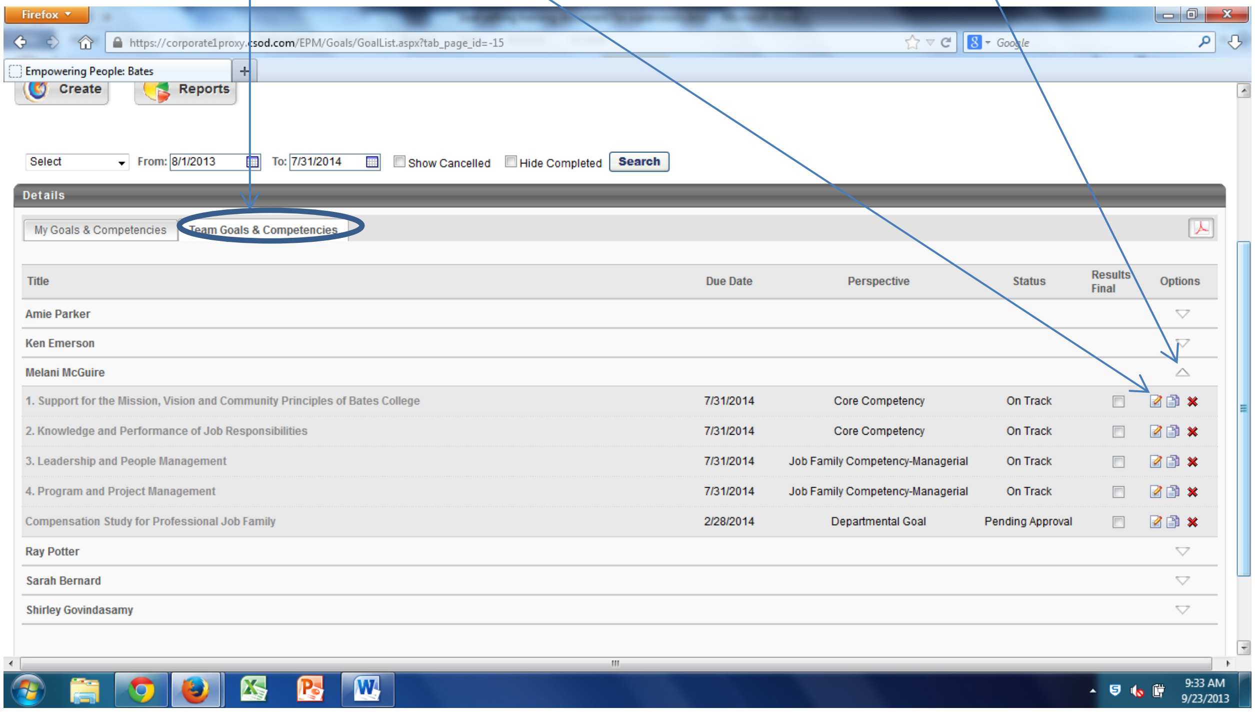
This is your Welcome screen where there are basic instructions. To begin, click on the My Performance tab.



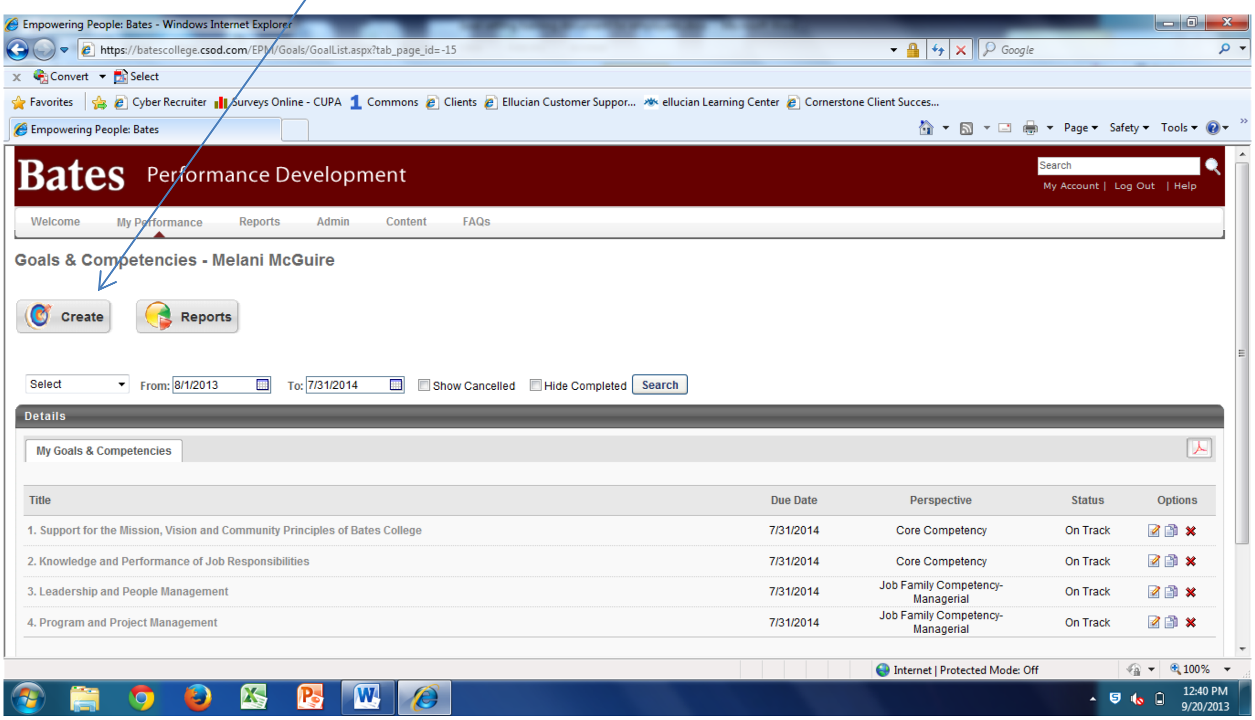
You will see this screen that has two tabs. First, one labeled My Goals & Competencies, that lists core competencies, your job family competencies, as well as goals that your supervisor has entered, or goals continuing from last year listed here. As you enter goals, they will also appear here.



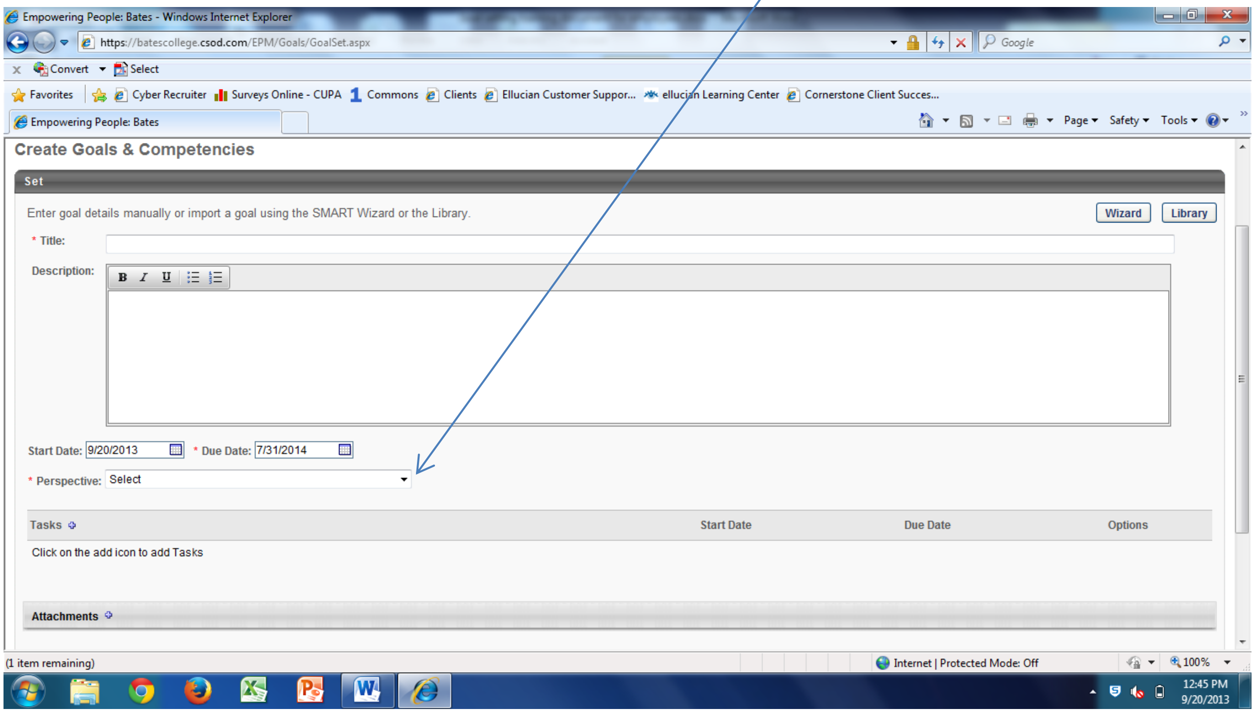
Second, there is a tab labeled Team Goals & Competencies. Here you find a listing of your direct reports. If you wish to view their goals and competencies, click on the arrow to the right of their name. You may edit goals or add comments to competencies by clicking on the edit icon next to that particular item.



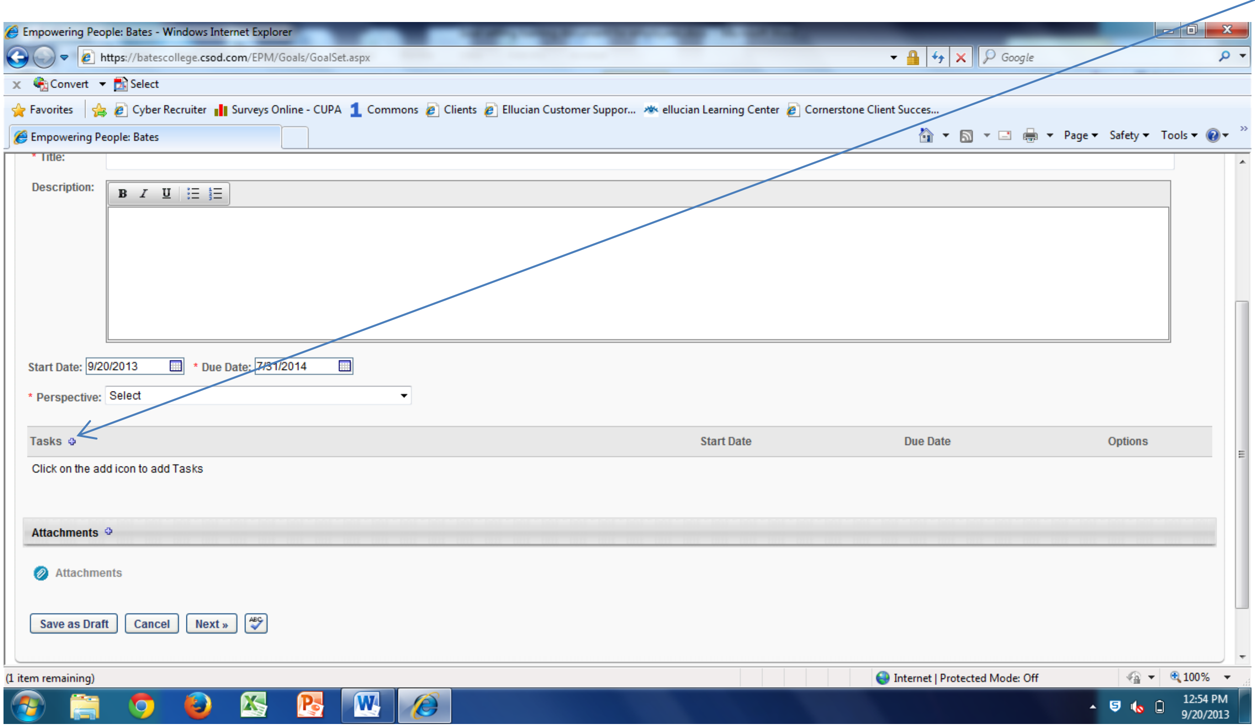
To enter a goal click on Create.



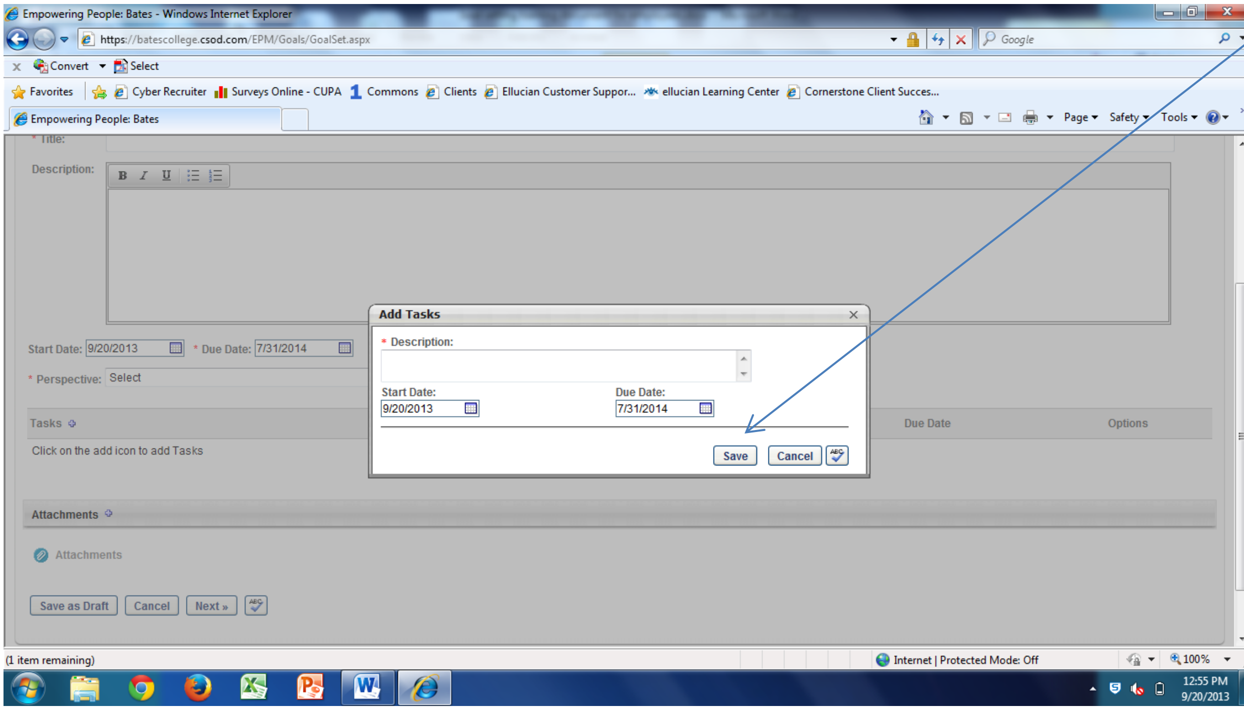
Enter the Title, Description, Start and Due dates. Click on the down arrow to choose the Perspective. The perspective will either be Departmental Goal for work in the department or Developmental Goal for personal development.



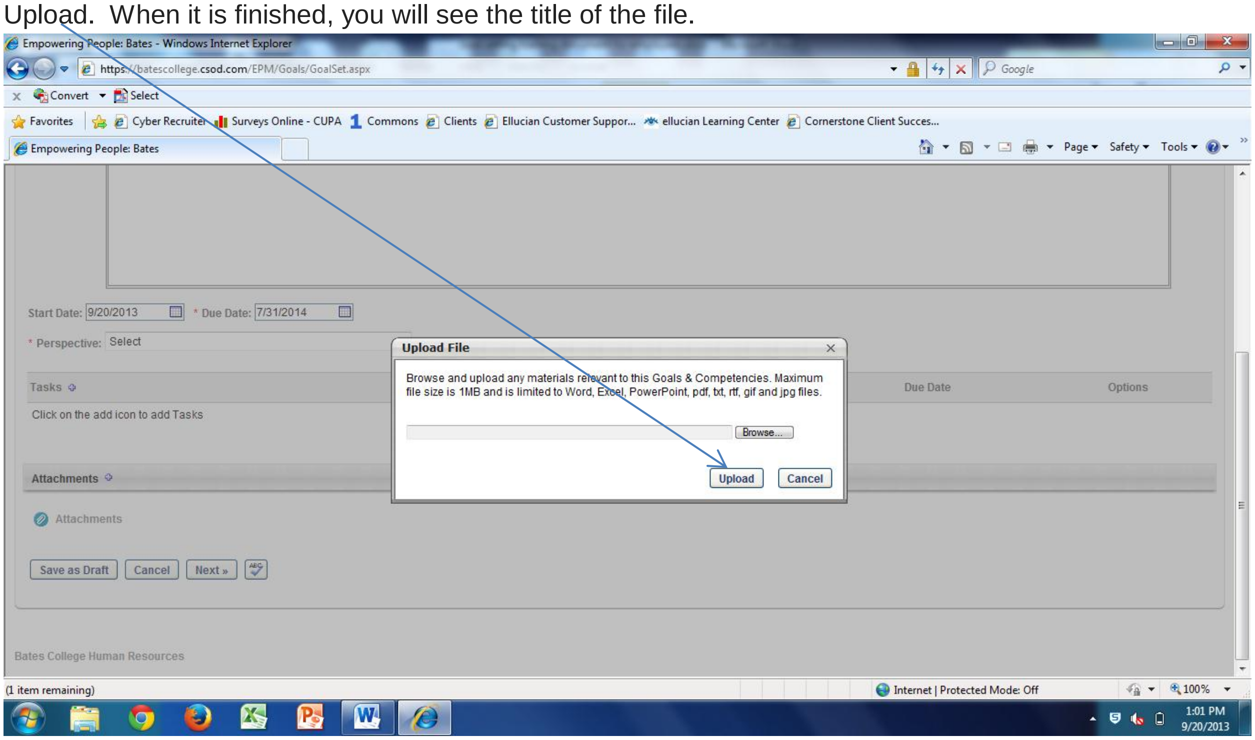
Some departments have the option of entering tasks and attachments for their goals. To enter a task(s) click on the next to Tasks.



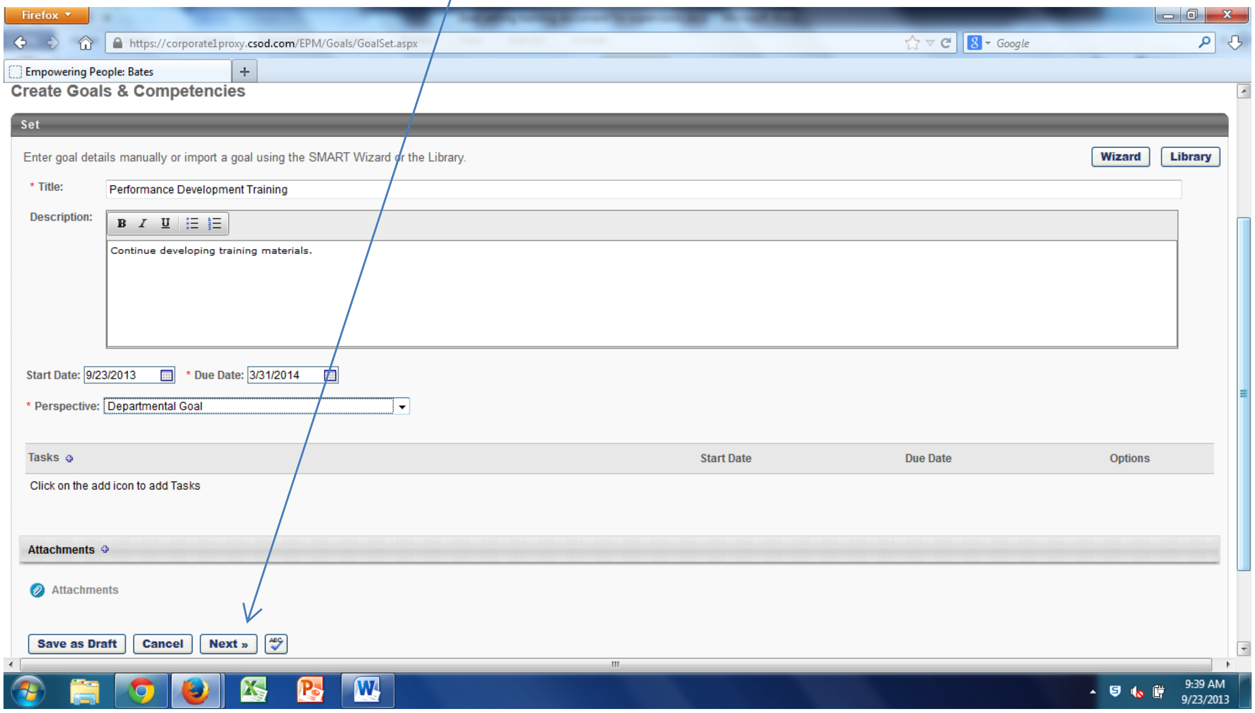
Here you can enter a description of a specific task in the goal with a Start and Due Date. When you are done, click Save. You can add as many tasks as you like repeating the same steps.



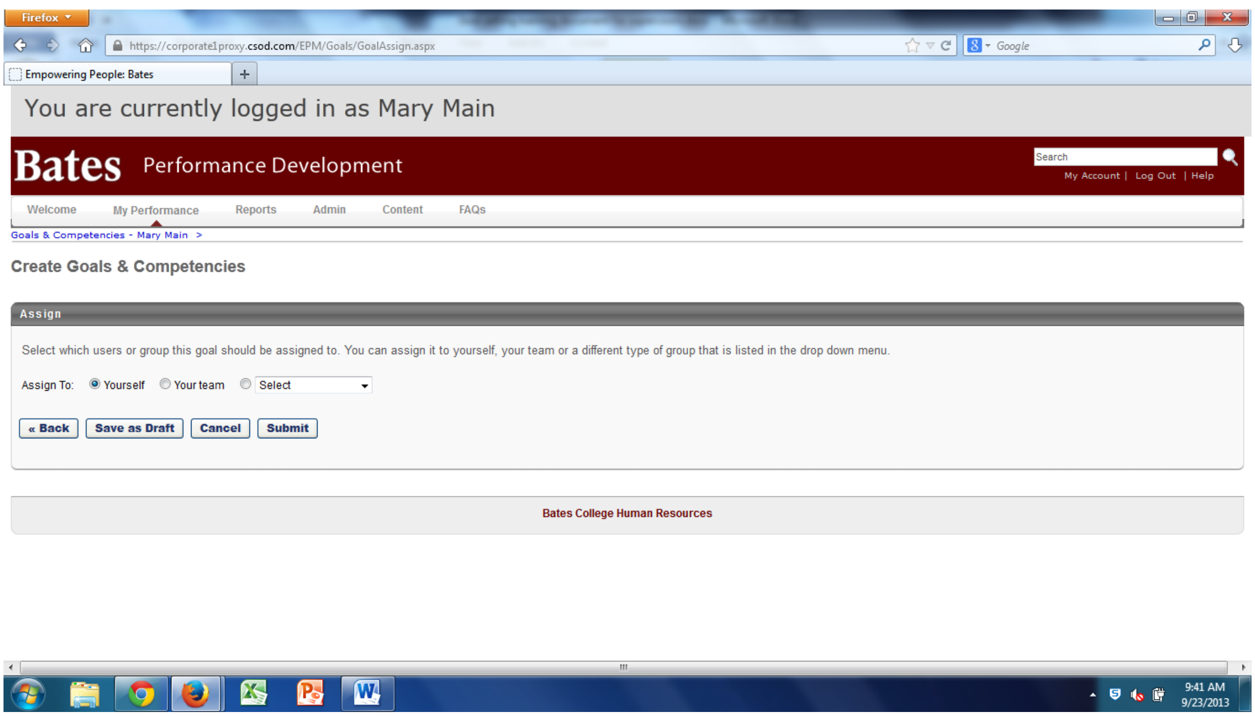
You may also add attachments to your goal setting, such as project plans or other documents. Be aware that these documents are only for the purpose of the current year's performance process. Once the current process is complete, any attachments will no longer be stored. If you would like to add an Attachment, click on the + next to Attachment. You will then get a pop up box that asks you to browse for the file you want to upload. When you have located it, click on Upload. When it is finished, you will see the title of the file.



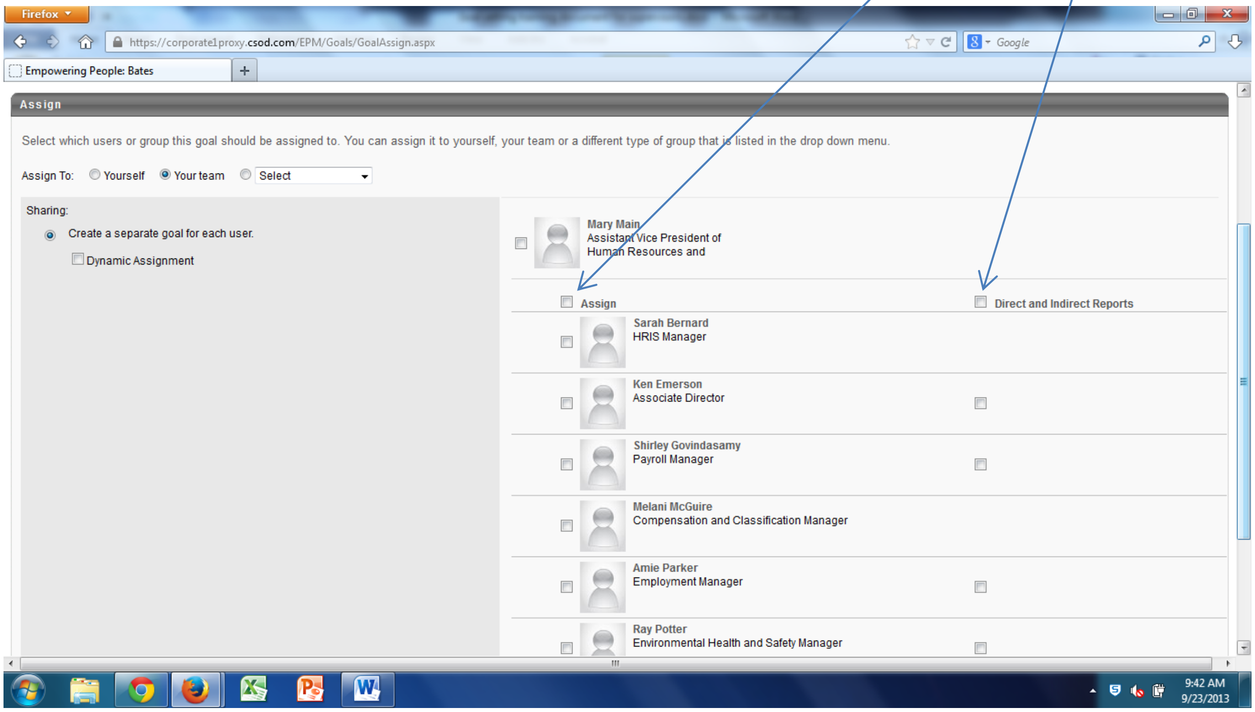
When you are finished entering your goal, you can click on Save as Draft if you are not finished, Cancel if you wish to start over or click Next to assign the goal.



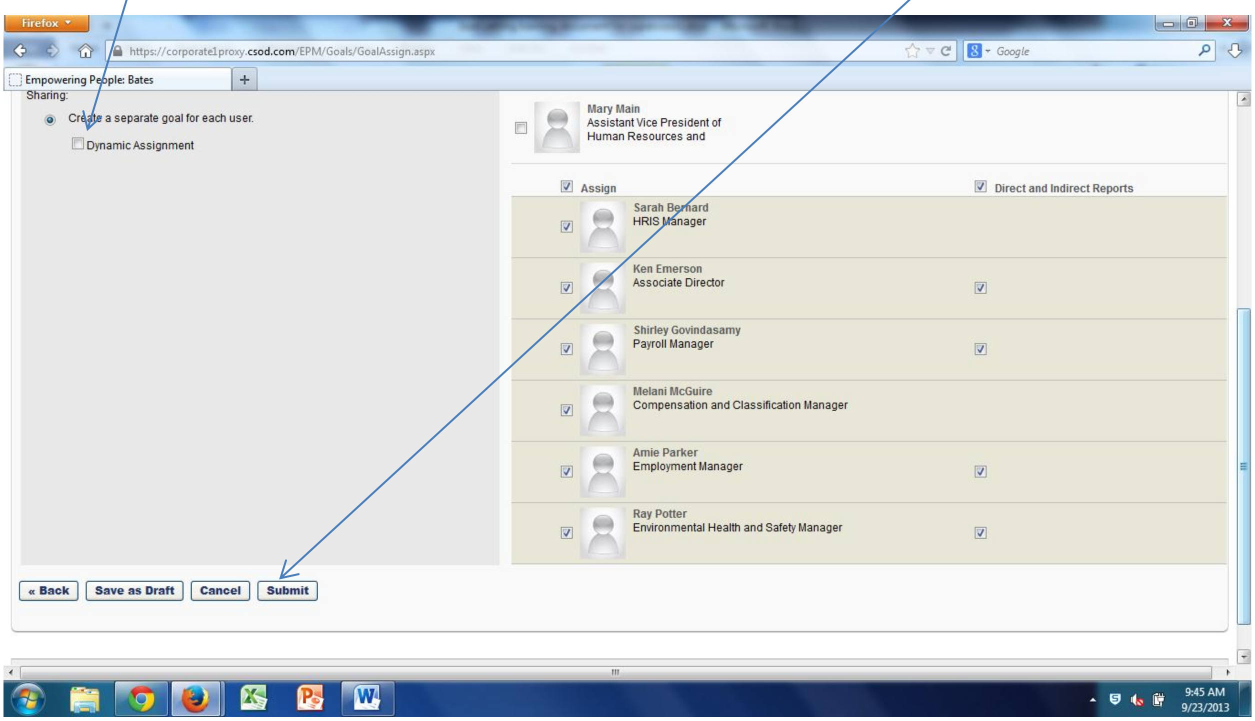
This screen gives you options for assigning the goal. If you click on Yourself, then the goal is assigned only to you.



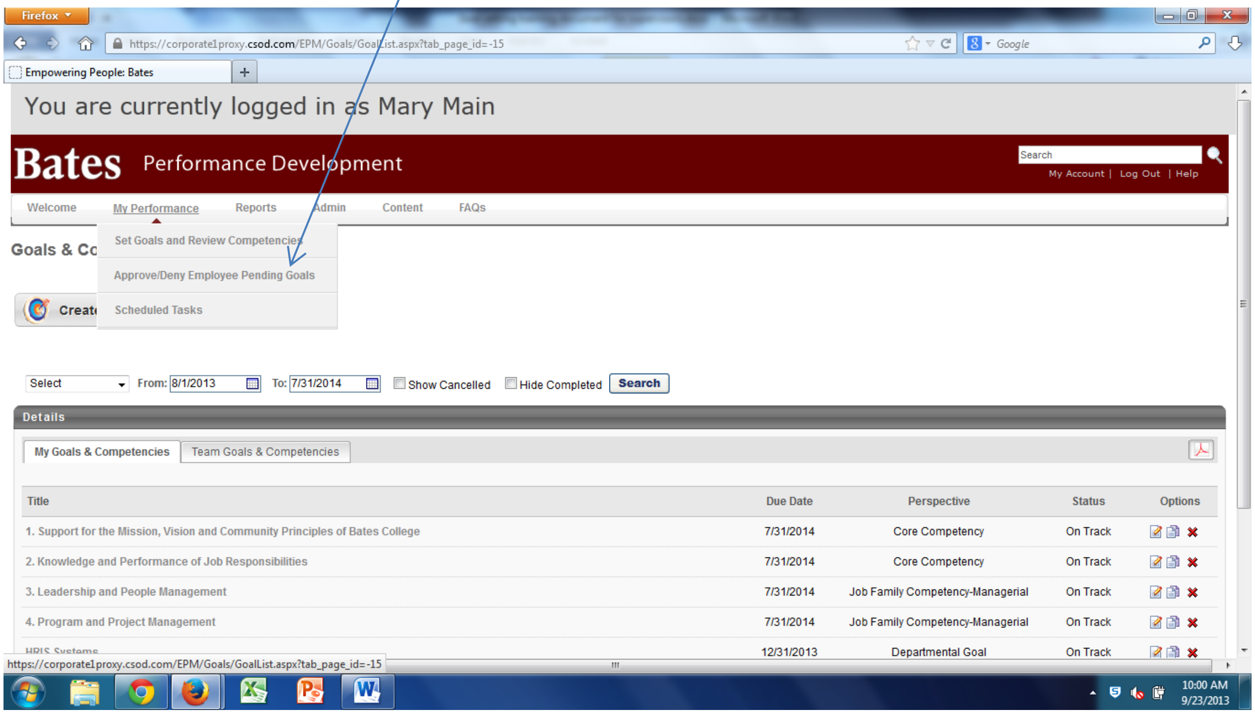
If you click on Your Team, a screen will appear that lists your direct reports. Click the box next to the person(s) you wish to assign that goal to. If you want to assign it to the entire team, click on Assign and Direct and Indirect reports.



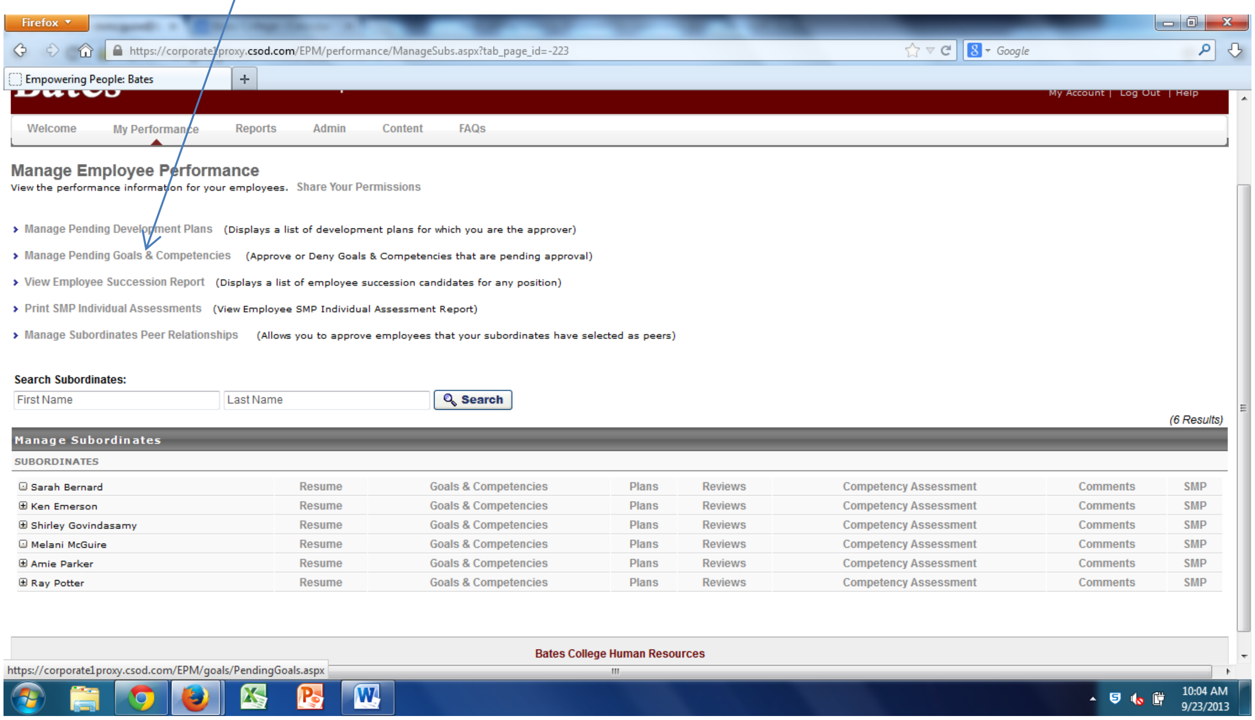
Clicking Dynamic Assignment will assign the goal to any employee that is hired during the year. Once you have assigned the goal you can Save as Draft and complete it later, Cancel if you wish to start over, or Submit to assign the goal according to your choices. WARNING: It takes time for the system to assign the goal to each person in the group. If you go into a person's record and don't see it there, DO NOT click Submit again. This will cause the system to assign the goal twice. Depending on the number of employees you are assigning the goal to, it can take several hours to assign the goal.



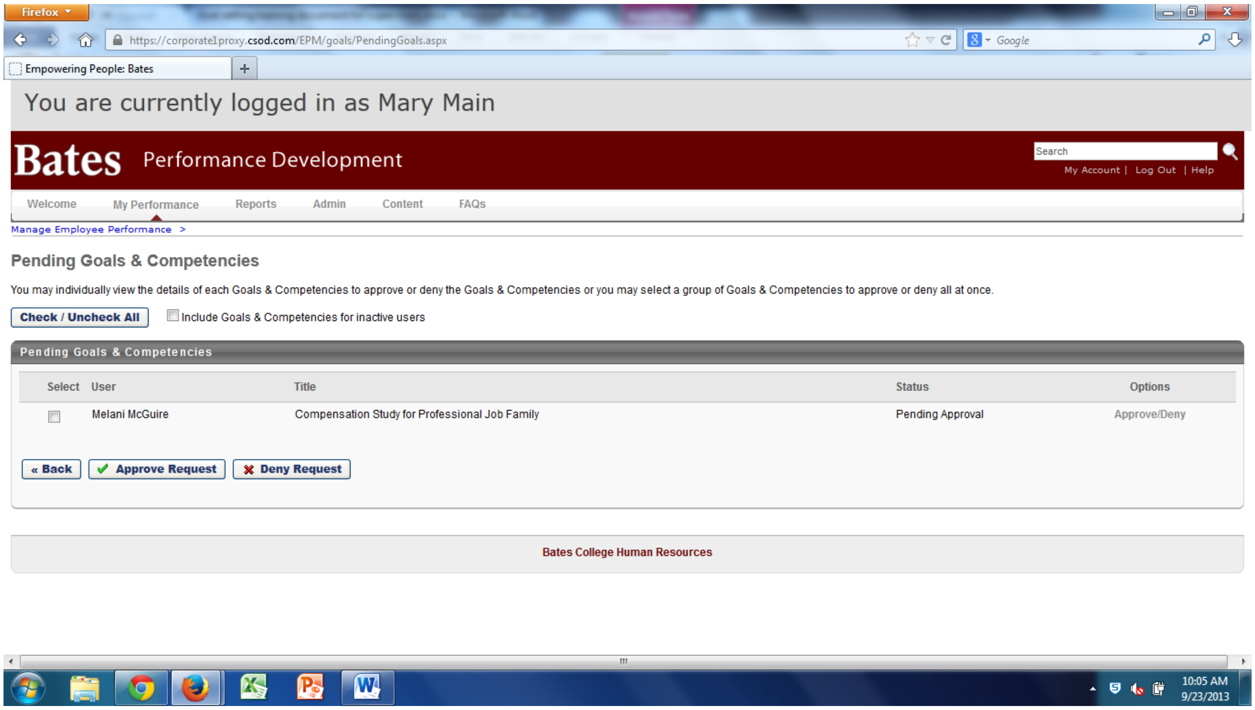
Employees will enter goals and make comments on competencies. Then they are submitted to you for approval. You will receive an email telling you that you have goals that need to be approved. To approve a goal, click on the My Performance tab and then Approve/Deny Employee Pending Goals. Changing or cancelling goals must also be approved.



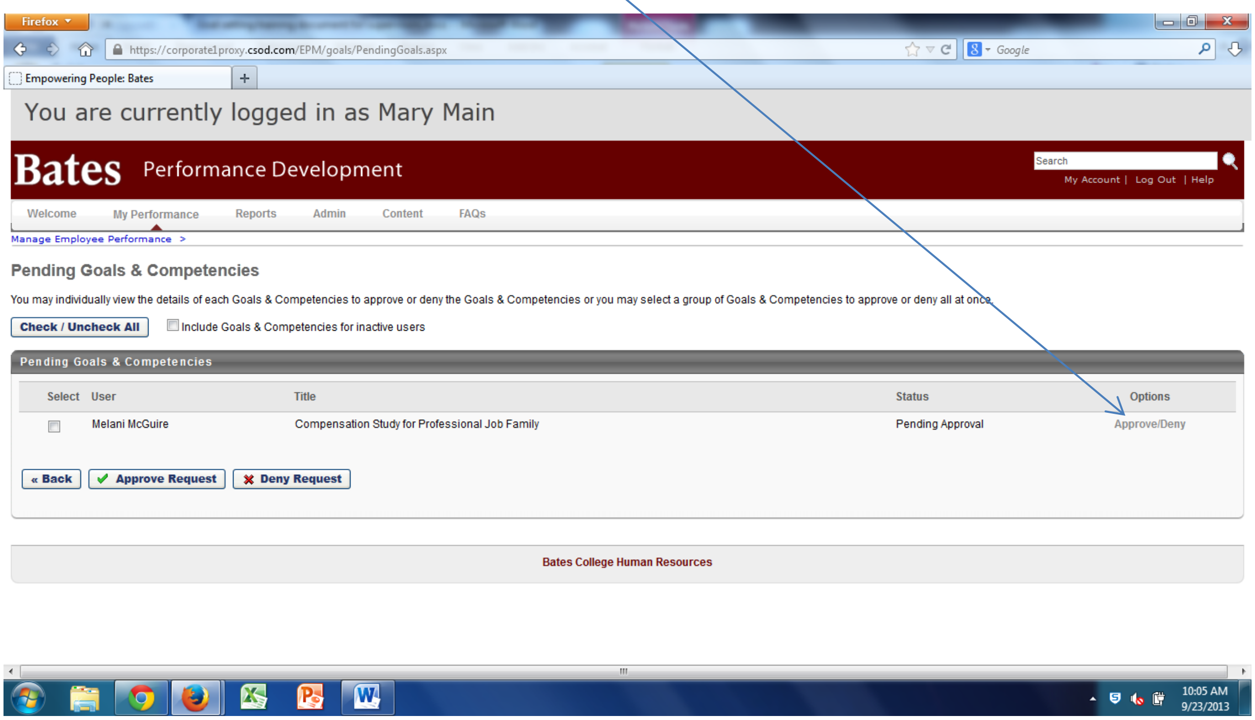
Click on Manage Pending Goals and Competencies.



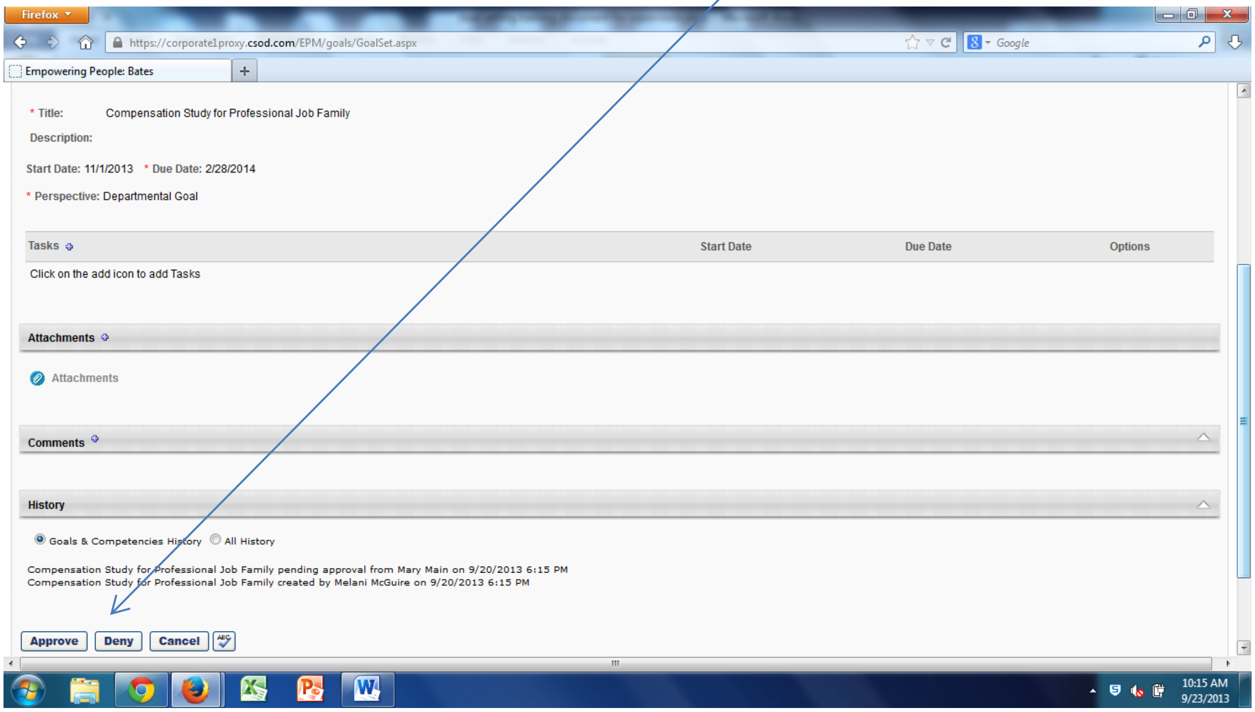
You can then see goals and competencies pending your approval.



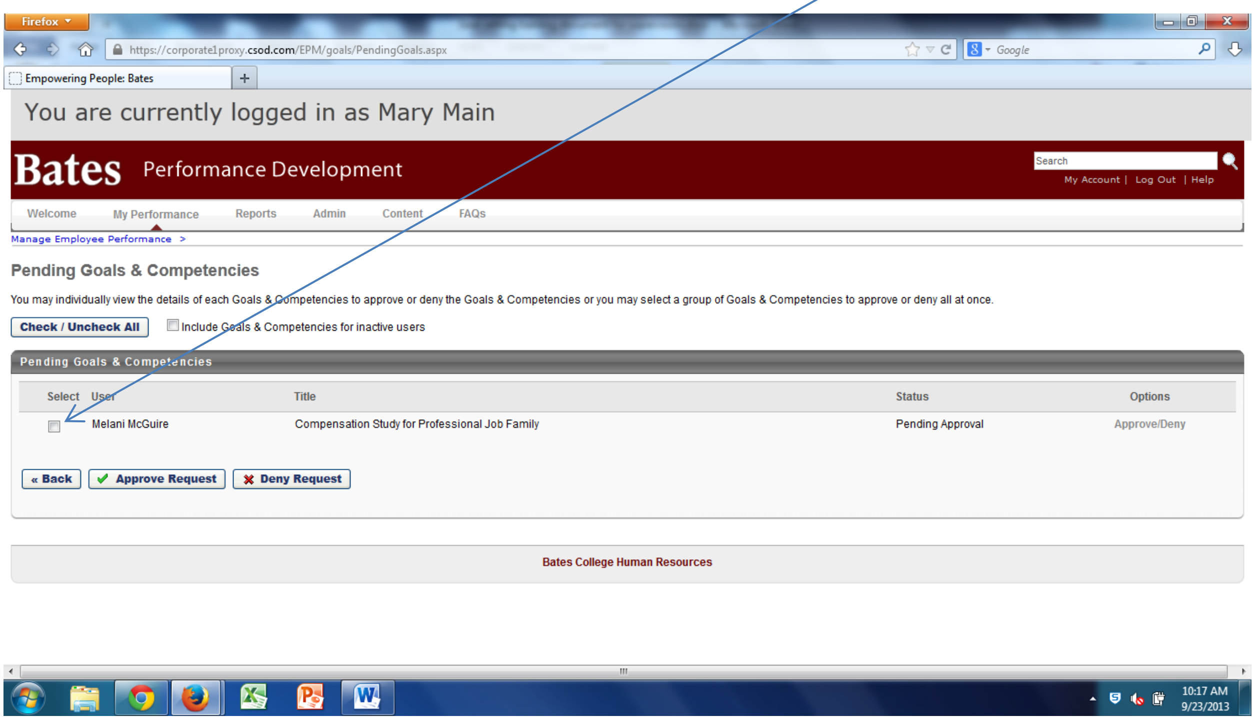
To see the detail of the goal, click on Approve/Deny.



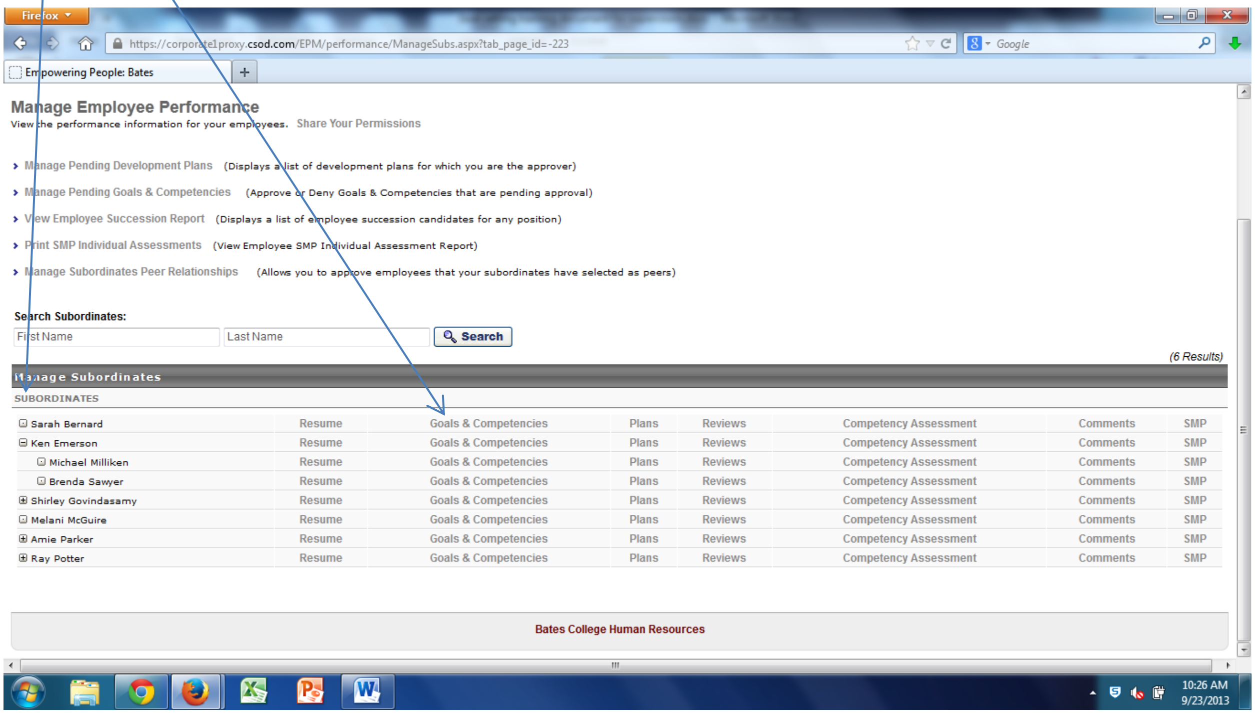
You can then approve or deny the goal by clicking on the corresponding button.



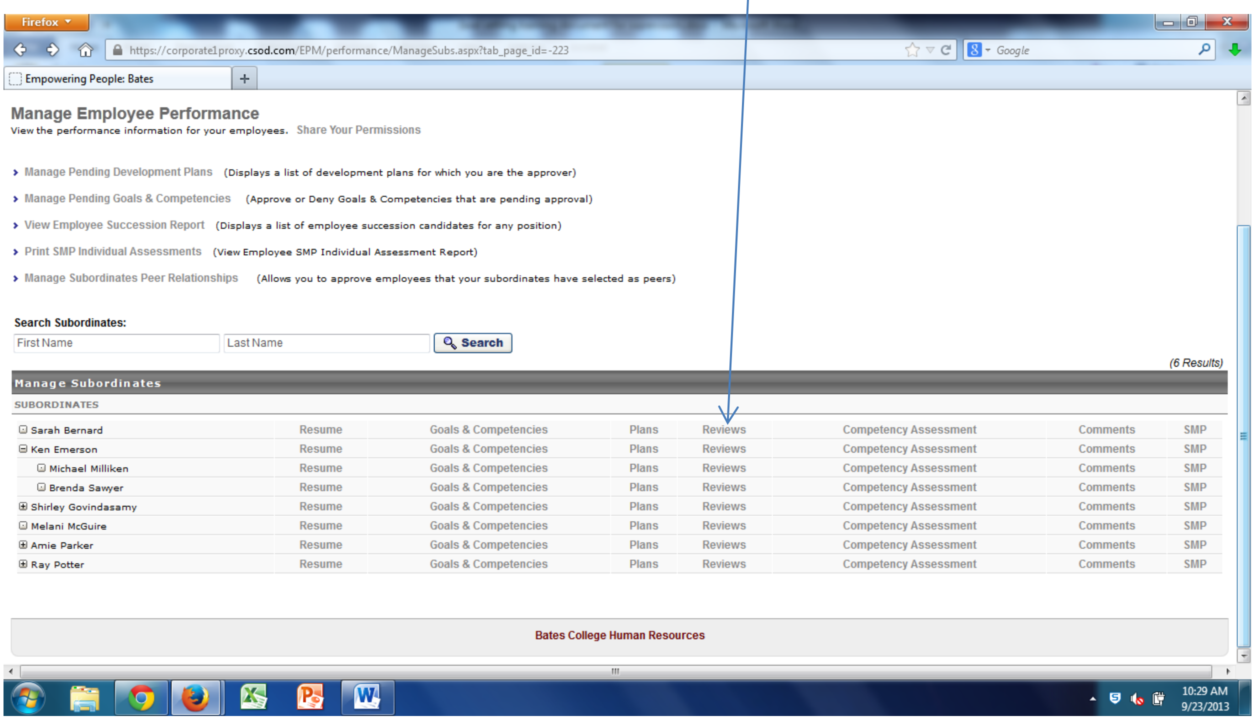
You can also approve without looking at the detail of a goal by clicking on the checkbox next to the person's name and then click on Approve Request or Deny Request. Clicking on Check/Uncheck All will place a check next to all the goals pending review.



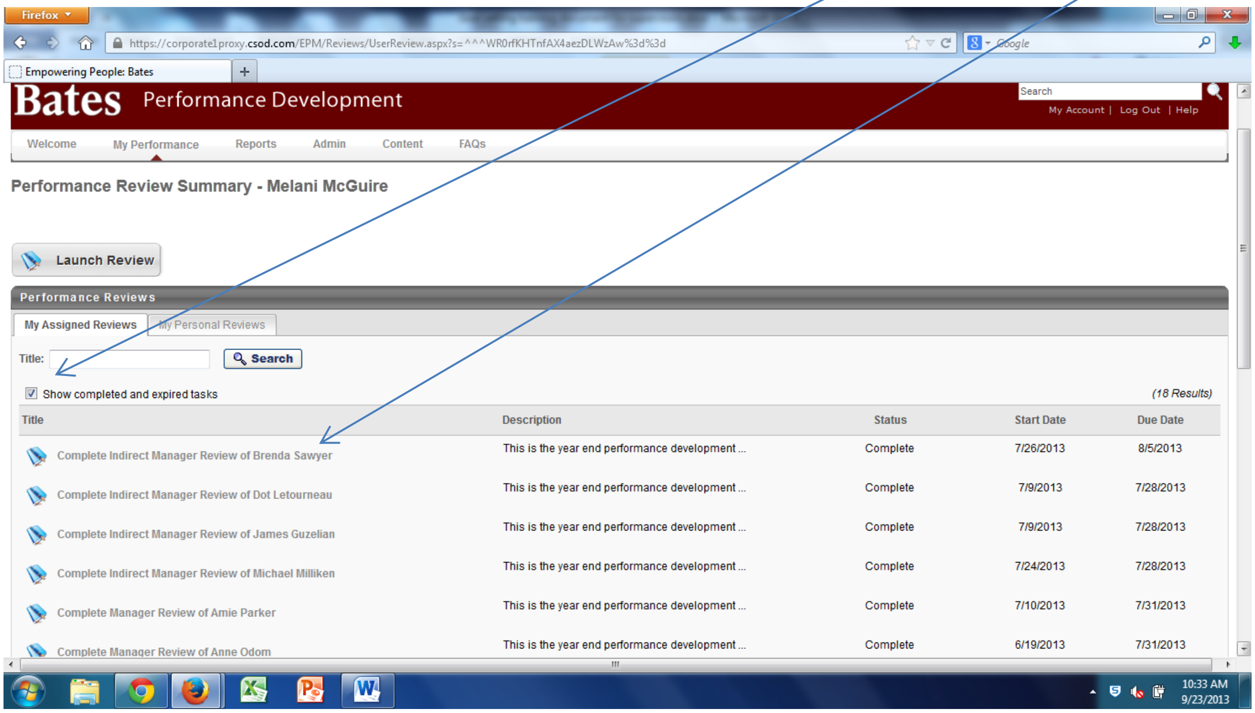
In order to view goals and competencies for any individual in your reporting line, go to My Performance then Approve/Deny Employee Pending Goals. The Manage Subordinates section lists your direct reports. If you click on the plus next to their name, you can also see their direct reports. Click on Goals & Competencies to see that individual's information.



You can also see the prior year end reviews by clicking on Reviews.



Since prior year end reviews are considered completed tasks, click on Show completed and expired tasks. The list of reviews for each individual appears. To see the review, click on the individual task you wish to see.



After you have completed entering and approving goals, and commenting on competencies for each of your direct reports it is time to set up a meeting to discuss the goals and competencies with that employee. This very important step in the process must be completed by November 30th. You can go back to edit and update during the review year.