Goal Setting in Performance Development for Employees

•Supervisor
- The supervisor enters goals for the employee by clicking on My Performance and then Create.
- After entering the goal the supervisor then clicks next and can assign the goal to a single or group of employees.
- Click on Save as Draft or Submit if done.
- Competencies should also be reviewed.

•Employee
- The employee enters goals by clicking on My Performance and then Create.
- Once the goal is entered, then click on Save as Draft or Submit if done.
- Competencies should also be reviewed.

employee sets goals

supervisor sets goals

employee and supervisor discuss goals and competencies

•Discussion
- After the employee and supervisor have discussed goals and competencies, the supervisor should make any changes.
- Approve/Deny the goals that the employee entered.
- To approve/deny goals, move your cursor to My Performance.
- Click on Approve/Deny Employee Pending Goals
- Click on Manage Pending Goals and Competencies.
- Click on the goal to approve/deny and then click Approve Request or Deny Request.

Steps to goal setting and competency review for employees.

1. Enter goals for the review year.
2. Review competencies and add any comments.
3. Submit goals to your supervisor for approval.
4. Meet with your supervisor 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 your core competencies and 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.

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.

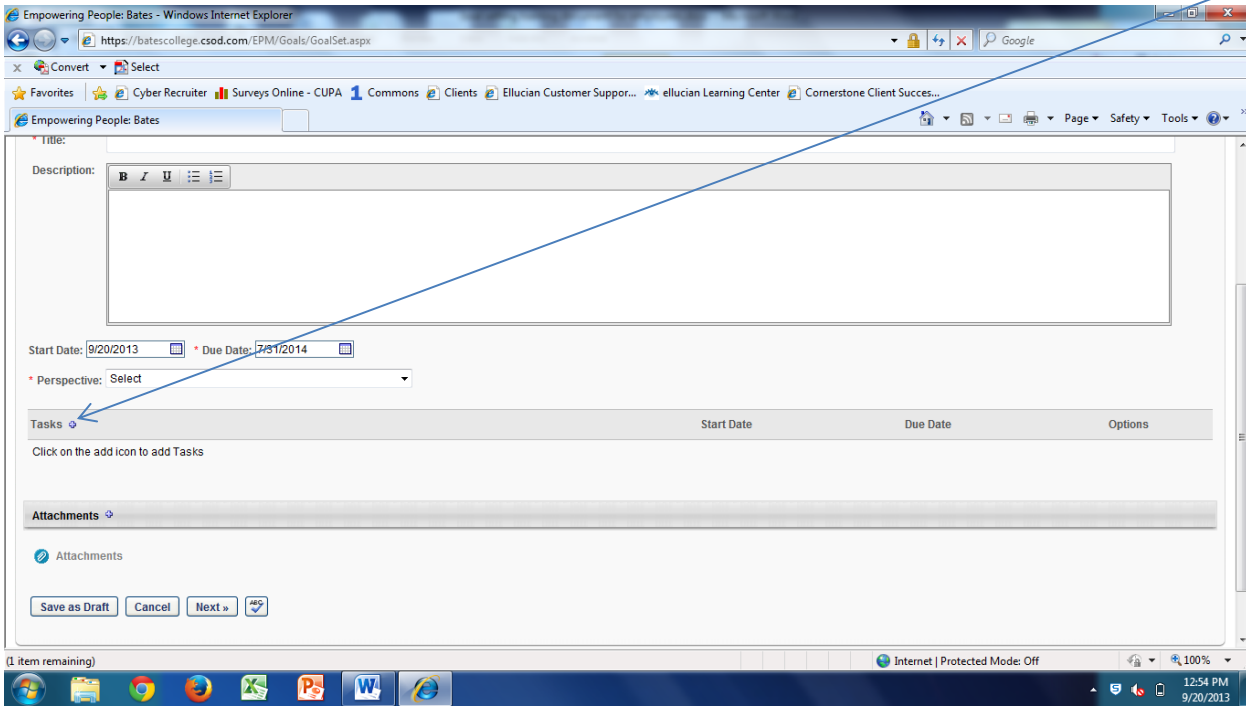Some departments have the option of entering tasks and attachments for their goals. To enter a task(s) click on the ✚ next to Tasks.

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.
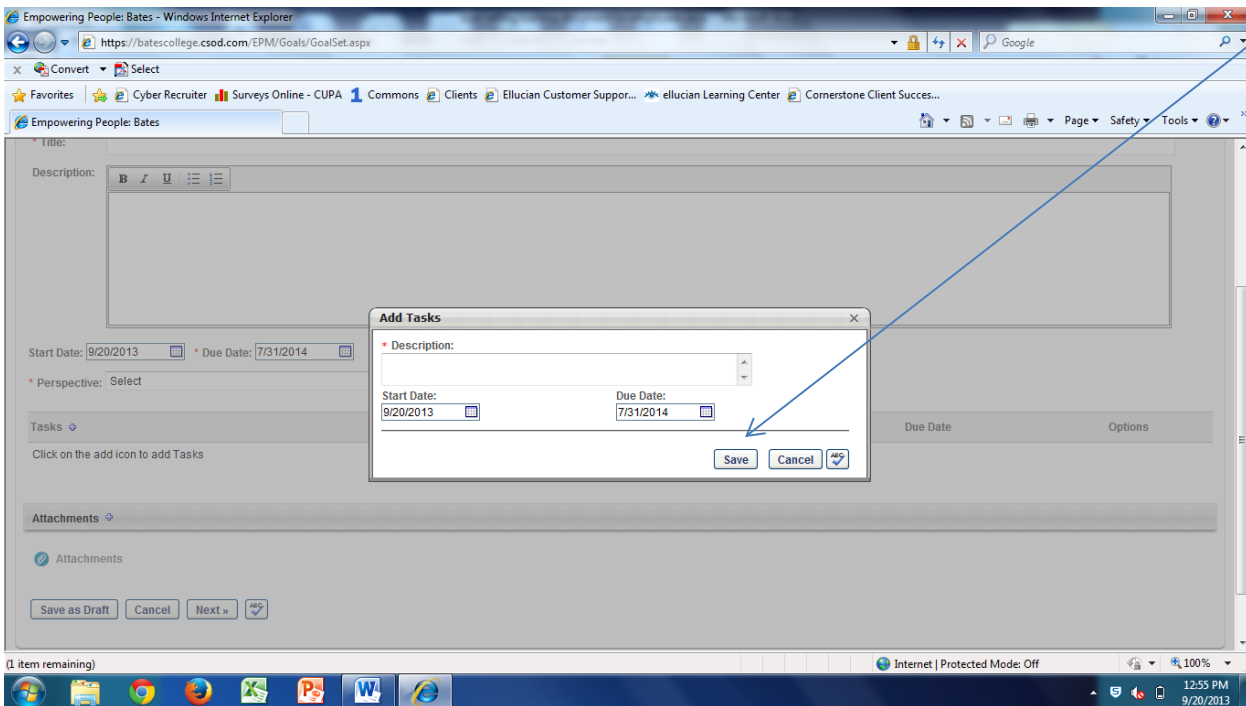
You may also add attachments to your goal setting, such as project plans or other documents. Be aware that these documents are only for the purpose of the current year's performance process. Once the current process i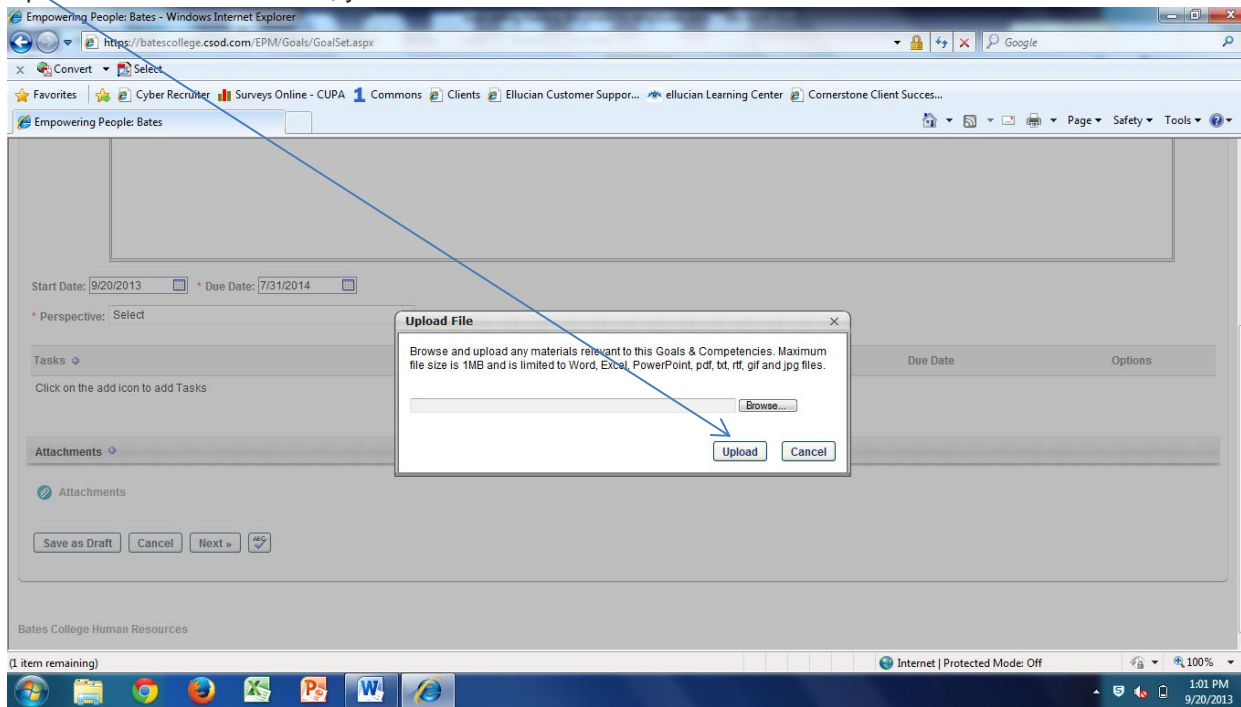s complete, any attachments will no longer be stored. If you would like to add an Attachment, click on the ➕ next to Attachment. You will then get a pop up box that asks you to browse for the file you want to upload. When you have located it, click on Upload. When it is finished, you will see the title 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 Submit if you are finished. Once you click Submit your goal is ready to send to your supervisor for approval.
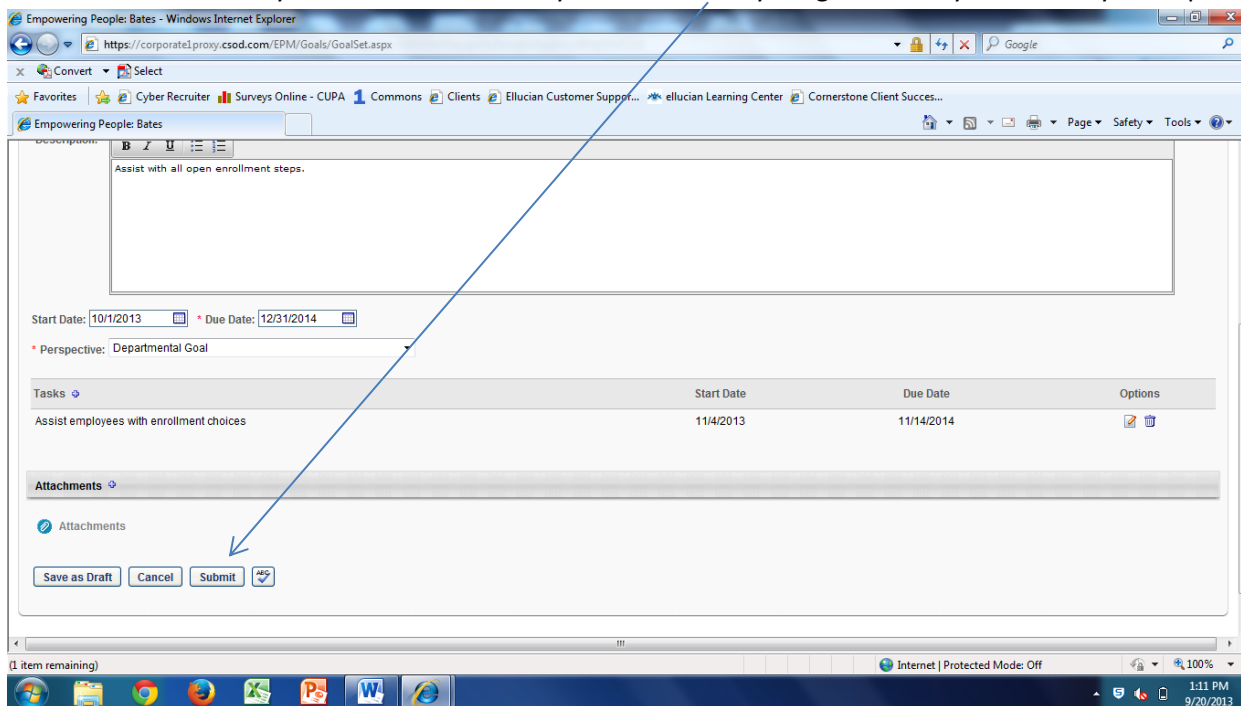
When you click Submit, it will return to the Goals and Competencies screen. If you are ready to send your goal(s) to your supervisor for their approval, click on Send an Approval Request.
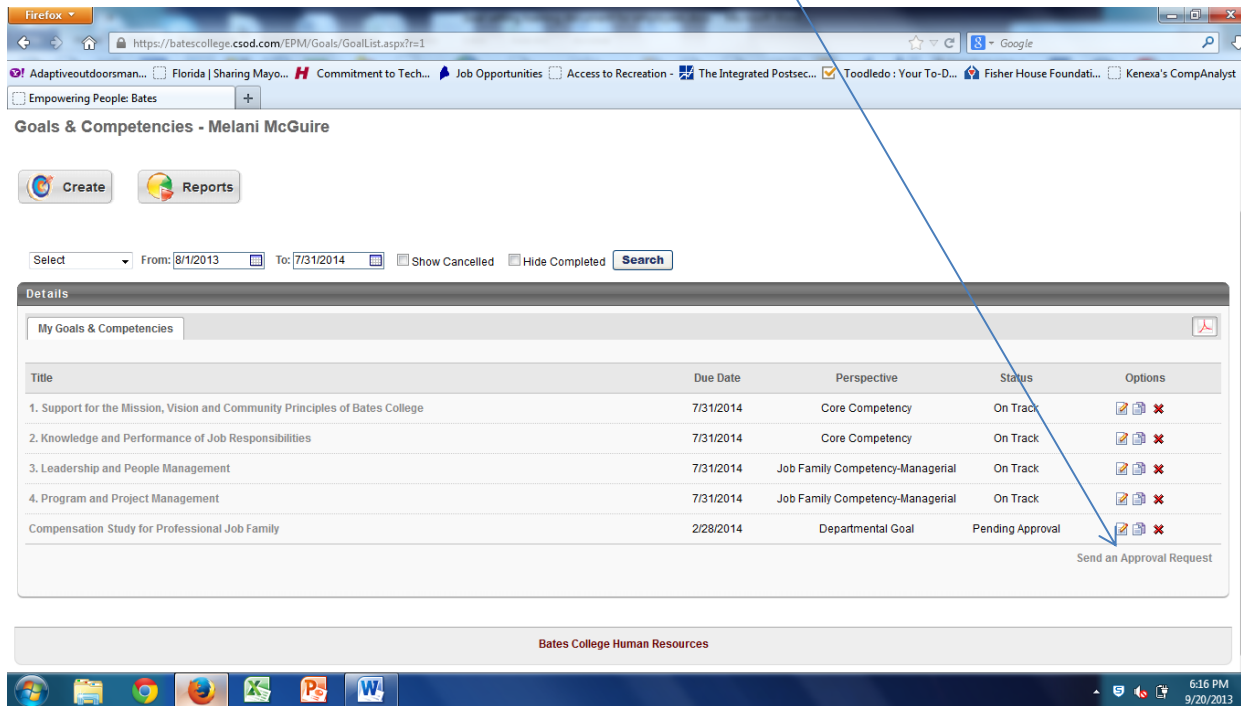
A pop up window will ask "Do you wish to send an approval request email for all pending goals?" Click on Yes to send the request.

A second pop up window will confirm that an email was sent. Your supervisor will receive an email stating that there are goals waiting for them to approve. You can add more goals or if you are finished you can click on logout. Make sure to close your browser by clicking on the red x in the top right corner.
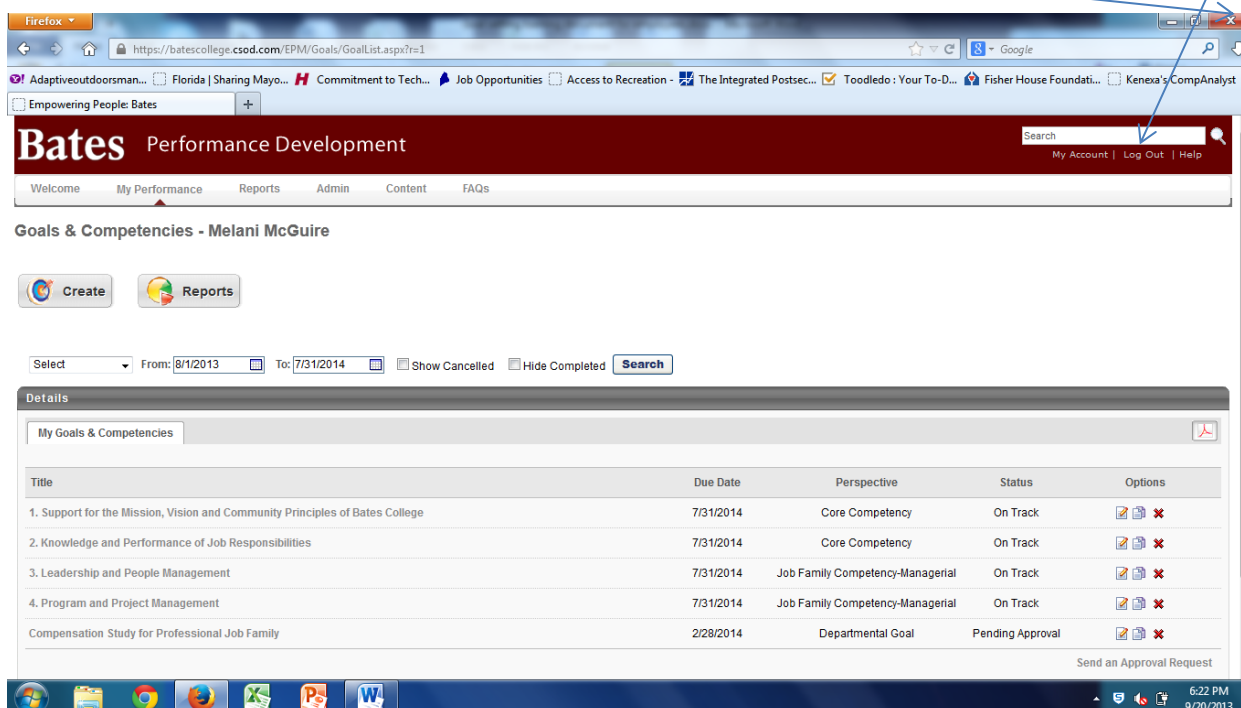
You can add comments to competencies or edit goals by clicking on the edit icon on the right of the particular goal or competency that you would like to edit.

You can add comments to a competency or goal by clicking on the ➕ next to comments.
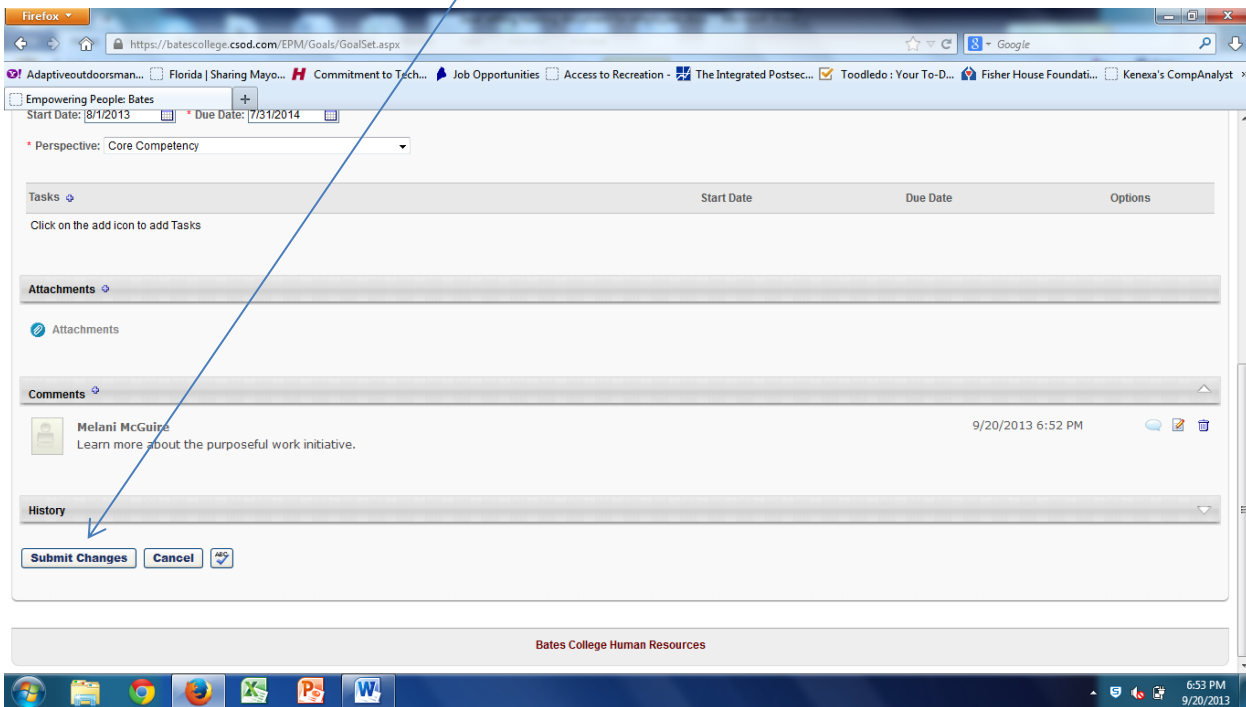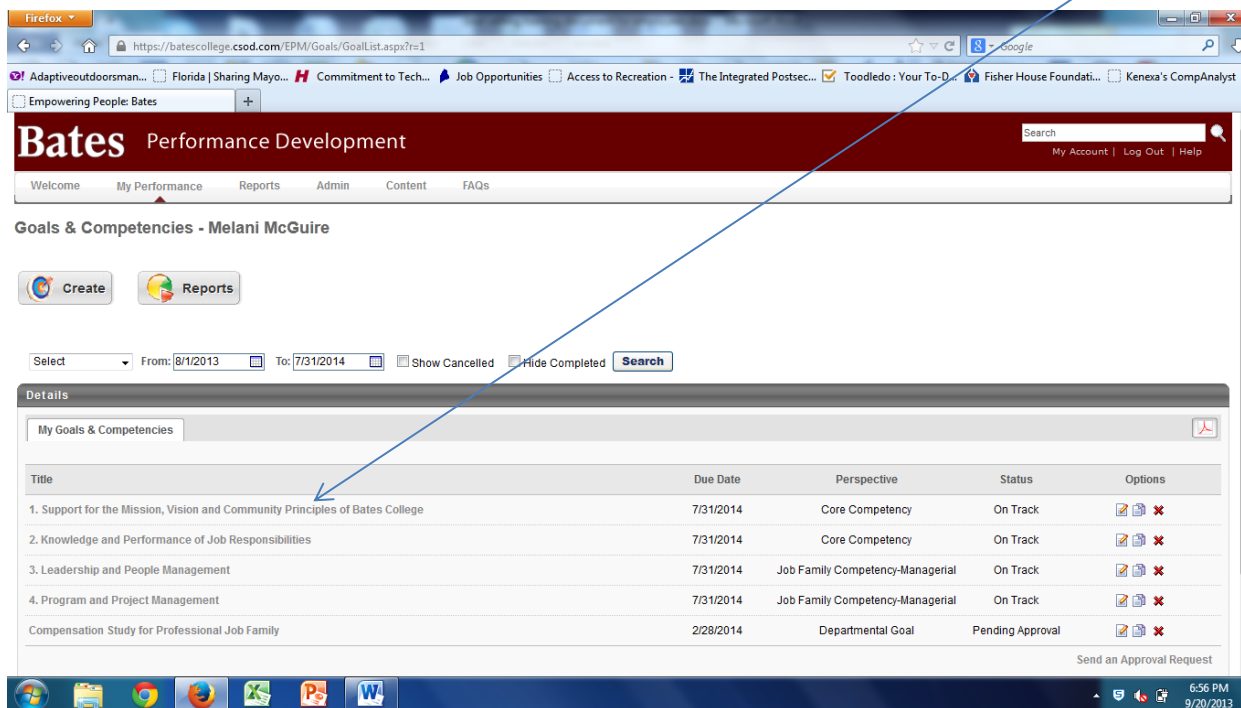
A pop up box will appear where you can enter your comment. When finished, click Save.
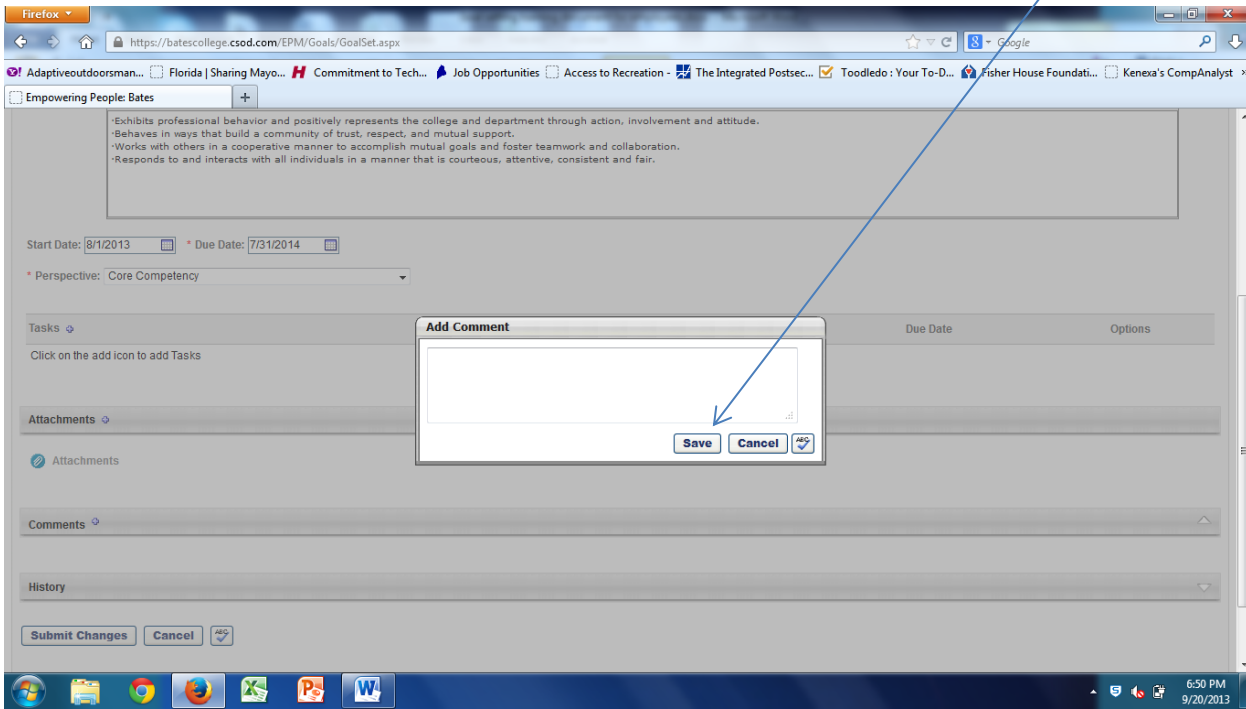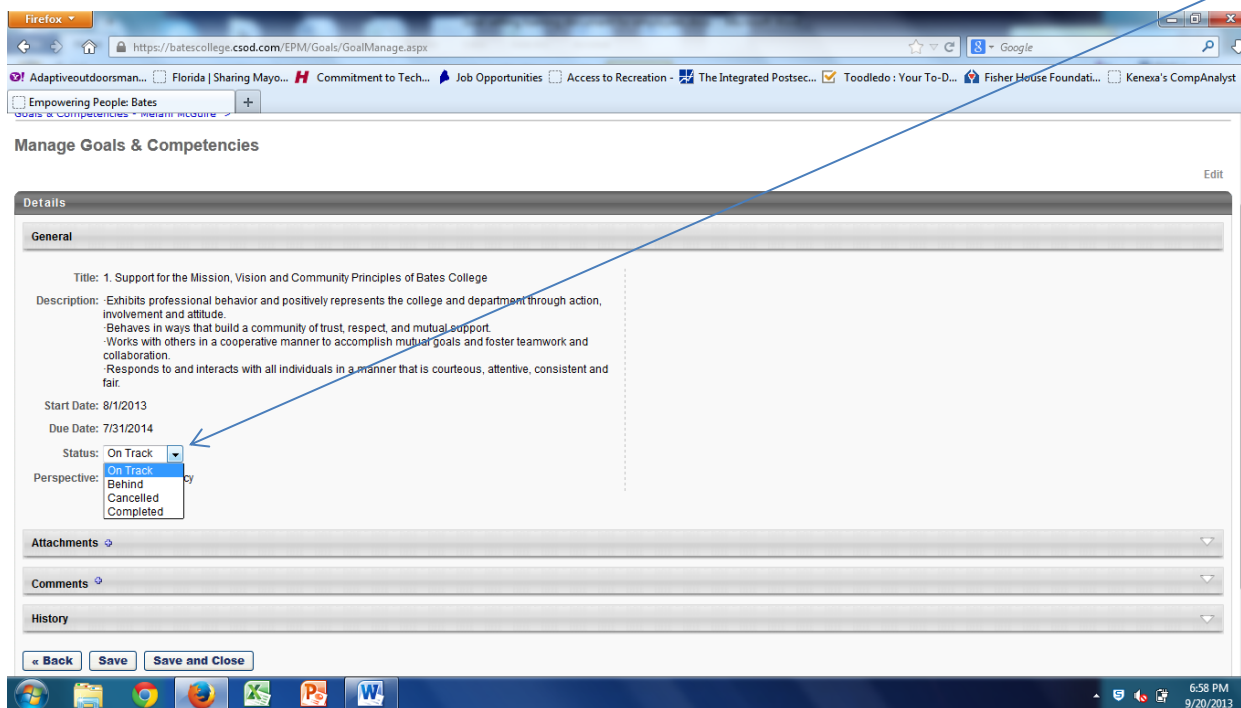

When finished, click on Submit Changes.

During the year, you can record the progress of your goal or competency by clicking on the title.

You can change the progress of the goal by clicking on the down arrow next to Progress and choose the status.

Click on Save and continue working or if finished click on Save and Close. Your supervisor will receive an email each time you submit, change or cancel a goal. You have now finished entering goals and reviewing the core and job family competencies. Your supervisor will also enter goals and review competencies for your performance. Once you are both finished, the next step is to have a discussion concerning your goals and competencies so that the expectations for performance are clearly understood by both you and your supervisor.