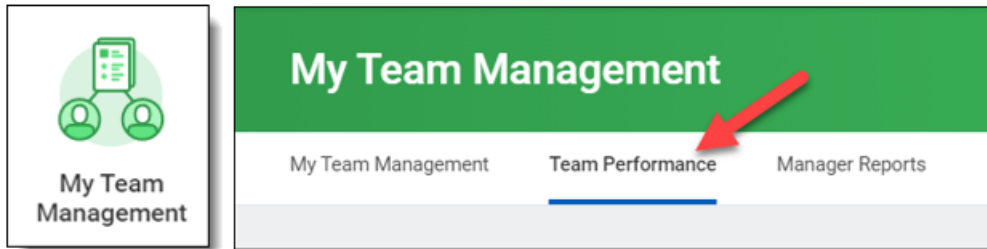


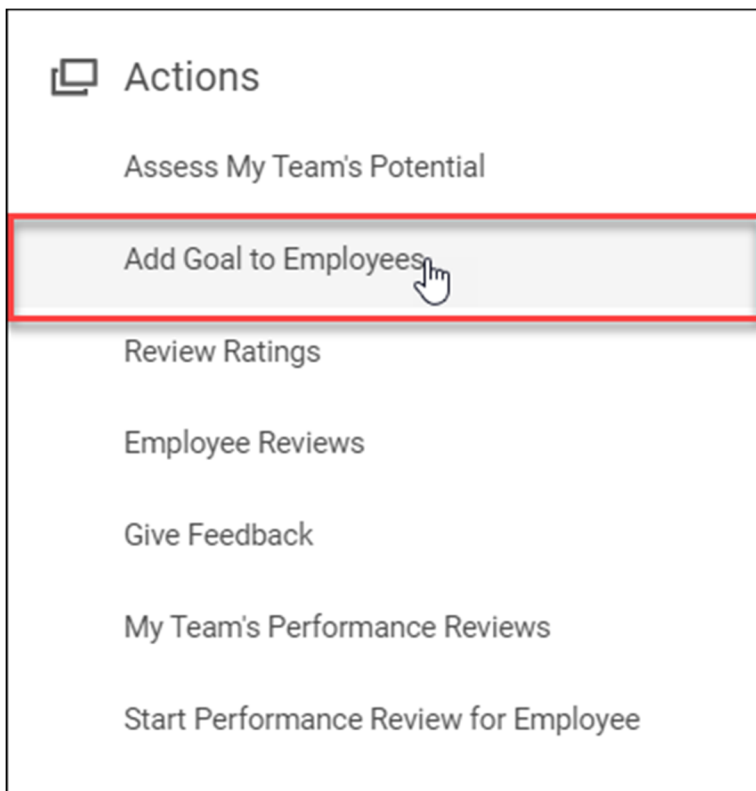
## Completing a Add Goals to Employee

This job aid will walk you step by step on how to assign goals to an employee or organization.

Step 1: On the *Home Screen*, click the **My Team Management** worklet, then click on the Team Performance tab.

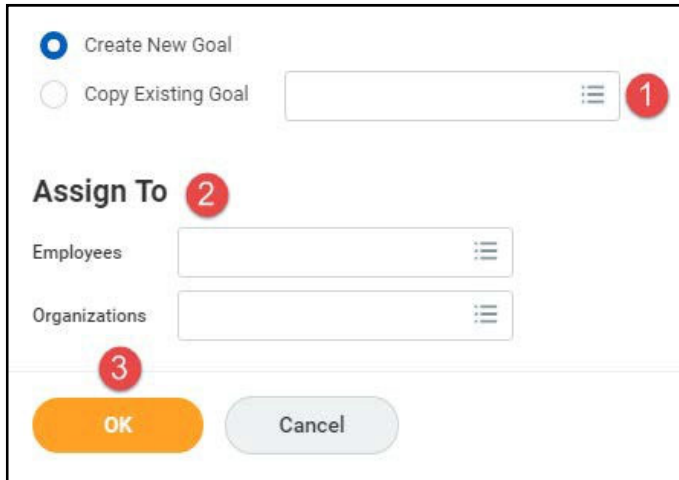


Step 2: From the *Actions* menu, click **Add Goal to Employees**.



Step 3: Complete the following fields.

1. Select either **Create New Goal** or **Copy Existing Goal**.
2. In the *Assign To* field, select either an employee or organization that you would like to assign the goal to, from the appropriate drop down menu.
3. Click **OK**.



**Note:** Any section with three dots and lines has a drop down with a list of available options.

Step 4: Complete the following fields.

1. In the *Goal* field, enter in a specific statement describing what is to be achieved.
2. In the *Description* field, enter in a description of what the goal is.
3. In the *Category* field, select the category the goal falls in from the drop down menu.
4. In the *Due Date* field, select the date for when the goal needs to be achieved.
5. If you and the employee want to be able to edit the goal details after it is assigned click the checkbox. If you leave it blank you and the employee will not be able to edit the goal in the future.
6. If you want to remove a goal click **Remove**.
7. If you want to add additional goals click **Add**.
8. When you done creating the goal click **Submit**. The employee will receive a notification of the goal being assigned.
9. If you aren't done creating the goal click **Save for Later**.

The screenshot shows a goal assignment form with the following elements and numbered callouts:

- 1**: The top text input field for the goal name.
- 2**: The text input field for the goal description.
- 3**: The dropdown menu for selecting a category.
- 4**: The date input field for the due date, showing a calendar icon.
- 5**: The checkbox for the 'Editable' option, which is currently checked.
- 6**: The 'Remove' button.
- 7**: The 'Add' button.
- 8**: The 'Submit' button.
- 9**: The 'Save for Later' button.

At the bottom of the form, there is also a 'Cancel' button.

Step 5: You will receive a confirmation the goal has been submitted.

