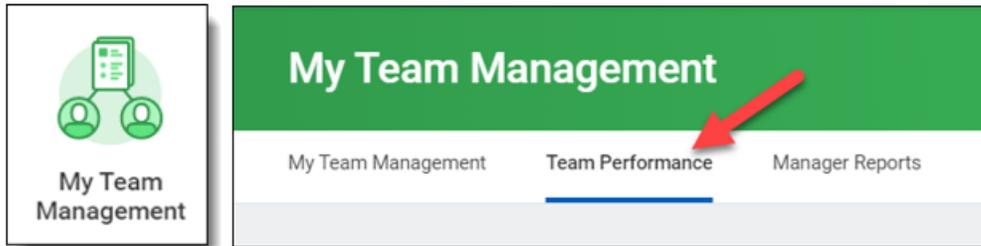


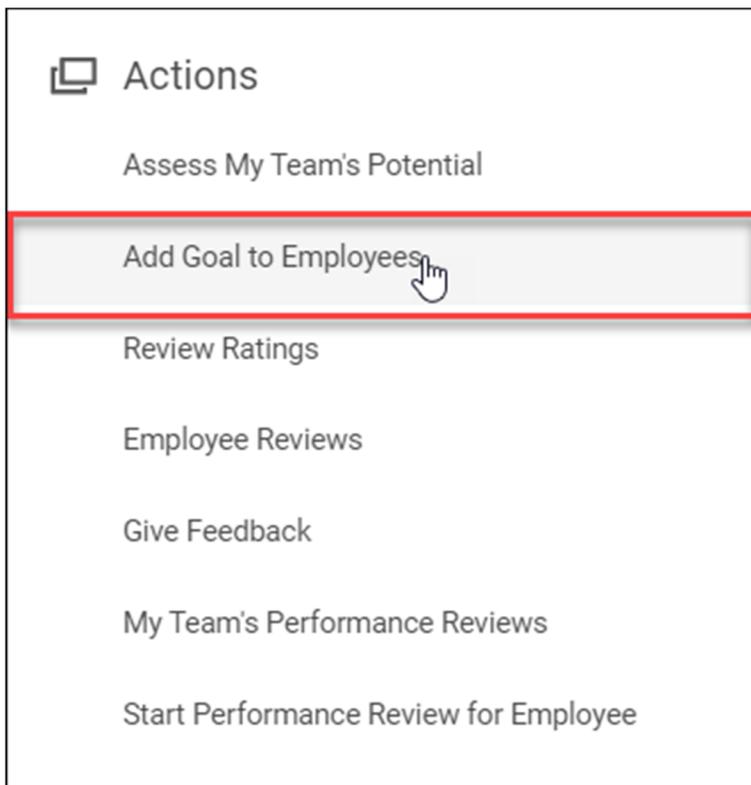
Completing a Add Goals to Employee

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.

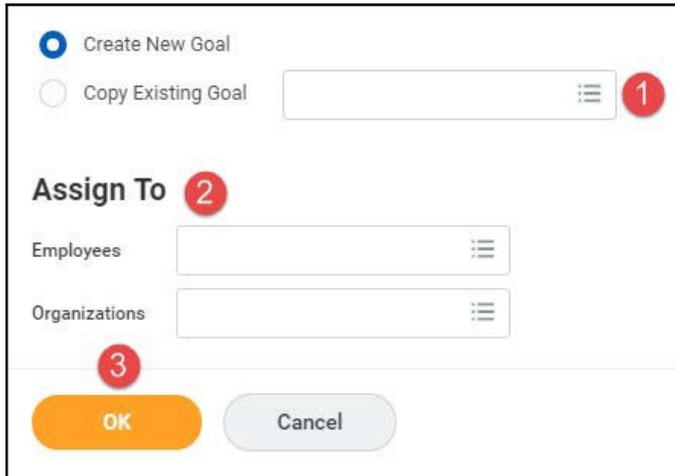


Step 2: From the *Actions* menu, click **Add Goal to Employees**.



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 form for assigning a goal. It includes a 'Goal' field with a rich text editor (1), a 'Description' field with a rich text editor (2), a 'Category' dropdown menu (3), a 'Due Date' field with a calendar icon (4), and an 'Editable' checkbox (5). Below these fields are three buttons: 'Remove' (6), 'Add' (7), and 'Submit' (8). At the bottom are 'Save for Later' (9) and 'Cancel' buttons.

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

