

# A Guide for Managers- Goal Setting Stage

## Goal Setting

- Setting goals is the first step in completing an employee evaluation. Each year, you will set goals for the upcoming year/evaluation period.
- Creating goals is important to manage your employee's performance.
- During this phase, managers convey the expectations of the position/department to employees.
- Goals should be specific, measurable, attainable/aligned, realistic/relevant, and time bound (S.M.A.R.T.)
- Goals should be strategic in nature and not daily tasks.

## How to Write S.M.A.R.T. Goals?

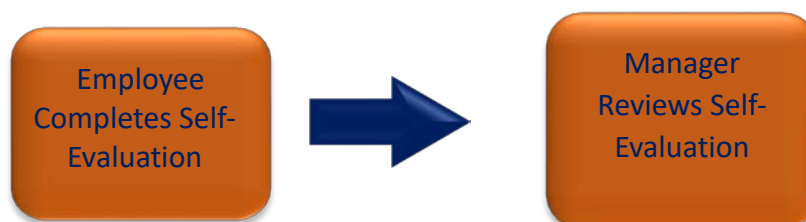
- Designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful professional development.

<b>S</b>	<b>Specific</b>	What will be accomplished? What actions will you take?
<b>M</b>	<b>Measurable</b>	What data will measure the goal? How much?
<b>A</b>	<b>Achievable</b>	Is the goal doable? Do you have the necessary skills?
<b>R</b>	<b>Relevant</b>	How does the goal align with broader goals? Why is the result important?
<b>T</b>	<b>Time Bound</b>	What is the time frame for accomplishing the goal?

## Update/Define Competencies

- You can add/modify competencies within each criterion.
- Competencies are characteristics used to evaluate the employee's job performance.
- If you have created specific competencies for another employee or in prior year evaluations, you have an option of copying these competencies.

**\*Once submitted, goals and competencies cannot be modified. Once finalized, this will enable the 2022 evaluation to become available.**



# Manager - Add Goals

1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.

2. Select the **Team Performance** tile.

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3. A list of available **Performance Documents** will appear. Select an employee to continue.

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Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Jorge Lopez	UTEP Performance Evaluation	Define Criteria	01/11	12/31	Program Coordinator/ Manager	03/31
John Smith	UTEP Performance Evaluation	Define Criteria	01/11	12/31	Post Doctoral	03/31

4. Verify the employee information.

5. From the "Goal Setting" tab, click on **Expand** to make adjustments:

**Note:** The "Pencil" icon allows you to modify goals and "Trash" icon allows you to delete goals.

6. In this example, we will add goals by selecting the **Pencil** icon.

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
 2. Make any necessary adjustments to the criteria and review your changes with the employee.  
 3. Once the performance criteria is correct select the submit button to complete this step.

Created By: Template      11/08      3:47PM

# Manager - Add Goals

UTEP Performance Evaluation  
Edit Item

**\*Title** 1. Insert goal here.

**Description**  
Insert description here.

**Measurement**  
Insert measurement here.

**Due Date** 08/31 example 12/31

**Update**

Return

7. Complete applicable goal setting fields: **Title, Description, Measurement, and Due Date.**

8. Click **Update** to save goal information.  
*Repeat steps 5-9 to add more goals.*

UTEP Performance Evaluation

Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11
Template	Clone_Staff Evaluation	Document ID	3750
Status	In Progress	Due Date	03/31

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes with the employee.  
3. Once the performance criteria is correct select the submit button to complete this step.

Goal Setting | Quality of Work | Productivity | Reliability | Teamwork | Strengths/Challenges

9. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.

10. After adding goals you can also add/remove competencies, use one of the following guides to edit/copy competencies:  
*Manager- Add Pre-defined Competencies*  
*Manager- Copy Competencies*  
If no changes are needed, select **Submit** to complete this process.

**Remember to constantly save your work, PeopleSoft will automatically time out due to inactivity and this may cause you to lose unsaved work.**

# Manager - Add Pre-defined Competencies



1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.
2. Select the **Team Performance** tile.
3. A list of available **Performance Documents** will appear. Select an employee to continue.

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Jorge Lopez	UTEP Performance Evaluation	Define Criteria	01/11	12/31	Program Coordinator/ Manager	03/31
John Smith	UTEP Performance Evaluation	Define Criteria	01/11	12/31	Post Doctoral	03/31

3

Performance Process

Steps and Tasks

Jorge Lopez  
UTEP Performance Evaluation  
01/11 - 12/31

Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title: Program Coordinator/ Manager  
Document Type: UTEP Performance Evaluation  
Template: Clone\_Staff Evaluation  
Status: In Progress

Manager: Luis Perez  
Period: 01/11 - 12/31  
Document ID: 3750  
Due Date: 03/31

4

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes.  
3. Once the performance criteria is correct select the submit button to save.

5

Quality of Work

6

7

8

9

6a

5. Verify employee information.

6. Select the **Quality of Work** tab.

7. Click on **Expand** to make adjustments:

- a. Use the **"Trash"** icon to delete any undesired competencies.

8. Add competencies by selecting the **Add Item** link.

You have three options when adding competencies, in this example we will **Add pre-defined item**:

8. Choose the **Add pre-defined item** option.
9. Click **Next**.

**Note:** You can also add your own competencies by selecting **Add your own item**.

# Manager - Add Pre-defined Competencies

UTEP Performance Evaluation

## Add a Pre-Defined Item

To search for items to add to the document select the search button. You can also enter search criteria to help refine your results.

**Search Criteria**

Title

**10**

**Search Results**

UTEP Performance Criteria - Quality of Work	
<input checked="" type="checkbox"/>	Responsiveness
<input type="checkbox"/>	Customer Services <b>11</b>
<input type="checkbox"/>	Accuracy
<input type="checkbox"/>	Safety

**12**

[Return](#)

10. Click the **Search** button to display competencies

11. Under the “UTEP Performance Criteria - Quality of Work” section, use the **check box** to select the competencies you want to copy. **Note:** You can also use the **Select All** hyperlink.

12. Click the **Add** button and you will then be redirected to the UTEP Performance Evaluation page.

13. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.

14. Repeat steps 6-13 for the following tabs:

- Productivity
- Reliability
- Teamwork

15. After adding all desired competencies, select **Submit** to complete this process.

UTEP Performance Evaluation

## Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title	Program Coordinator/ Manager
Document Type	UTEP Performance Evaluation
Template	Clone_Staff Evaluation
Status	In Progress

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
 2. Make any necessary adjustments to the criteria and review your changes with the employee.  
 3. Once the performance criteria is correct select the submit button to complete this step.

**14a** **14b** **14c**

**13**   **15**

[Print](#) | [Notify](#)

**Remember to constantly save your work, PeopleSoft will automatically time out due to inactivity and this may cause you to lose unsaved work.**

# Manager - Copy Competencies

1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.

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John Smith	UTEP Performance Evaluation	Define Criteria	01/11	12/31	Post Doctoral	03/31

4. Verify employee information.

5. Select the **Quality of Work** tab.

6. Click on the **Expand** to make adjustments:

- a. Use the **“Trash”** icon to delete any undesired competencies..

7. Add competencies by selecting the **Add Item** link.

8. Choose the **Copy Item from My Team’s Documents** option.

9. Click **Next**.

# Manager - Copy Competencies

UTEP Performance Evaluation

### Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ Filter Criteria

First Name  Last Name  11

Document Type

Period Between  -

10

12

Performance Documents

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="checkbox"/> <span>13</span>	Jorge Lopez	UTEP Performance Evaluation	Completed	01/01	12/31

10. From the "Select a Document" screen, click the **Clear** button to begin.

11. Then, enter the **First Name** and **Last Name** in the respective fields.

12. Click the **Filter** button to display Performance Documents.

13. **Select** the document to copy.

### Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select save your entry.

Copy from Document

Name Jorge Lopez  
Section UTEP Performance Criteria - Quality of Work  
Begin Date 01/01

UTEP Performance Criteria - Quality of Work to be copied

	UTEP Performance Criteria - Quality of Work
<input type="checkbox"/>	Responsiveness
<input type="checkbox"/> <span>14</span>	Customer Services
<input type="checkbox"/>	Accuracy

15

14. Under the "UTEP Performance Criteria - Quality of Work" section, use the **check box** to select the competencies you want to copy. **Note:** You can also use the **Select All** hyperlink.

15. Click the **Copy** button and you will then be redirected back to the "UTEP Performance Evaluation" page where you will see the copied competencies.

UTEP Performance Evaluation

### Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title Program Coordinator/ Manager  
Document Type UTEP Performance Evaluation  
Period 01/11 - 12/31

16  17

Print | Notify

16. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.

17. Select **Submit** to complete this process.

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# Manager - Copy Goals

1 **Employee Self Service** dropdown menu

- Employee Self Service
- Manager Self Service**
- Analytics & Reporting

2 **Team Performance** tile

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3 **Performance Documents** table

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**Performance Process** - UTEP Performance Evaluation

**Define Criteria - Update and Submit**

4 **Jorge Lopez** employee information

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	Clone_Staff Evaluation	Document ID	3750
Status	In Progress	Due Date	03/31

5 **Expand** button

6 **Add Item** button

7 **Add Item** dialog box

- Add your own Item
- Copy Item from My Team's Documents**

8 **Next** button

4. Review employee information if needed.

5. Click on the **Expand** to make adjustments:

**Note:** The **"Pencil"** icon allows you to modify goals and **"Trash"** icon allows you to delete goals.

6. In this example, we will copy goals from another document by selecting the **Add Item** link.

7. Choose the **Copy Item from My Team's Documents** option.

8. Click **Next**.



# Manager - Copy Goals

UTEP Performance Evaluation

## Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ Filter Criteria

First Name  Last Name  10

Document Type

Period Between  -

9

11

Performance Documents

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="checkbox"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">12</span>	Jorge Lopez	UTEP Performance Evaluation	Completed	01/01	12/31

9. From the "Select a Document" screen click the **Clear** button to begin.
10. Then, enter the **First Name** and **Last Name** in the respective fields.
11. Click on the **Filter** button to display Performance Documents.
12. **Select** the document to copy.

Performance Document

## Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, save your entry.

Copy from Document

Name Jorge Lopez  
Section UTEP Goal Setting and Development Planning  
Begin Date 01/01

UTEP Goal Setting and Development Planning to be copied

	UTEP Goal Setting and Development Planning
<input type="checkbox"/>	1. Contribute novel Ideas and Strategies <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">13</span>
<input type="checkbox"/>	2. Program Evaluation
<input type="checkbox"/>	3. Promotion and marketing of the Faculty Lounge
<input type="checkbox"/>	4. New Faculty Onboarding

14

13. Under the "UTEP Goal Setting and Development Planning to be copied" section, use the **check box** to select the goals you want to copy.  
*Note: You can also use the [Select All](#) hyperlink.*
14. Click the **Copy** button and you will then be redirected back TO the "UTEP Performance Evaluation" page where you will see the copied goals.
15. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.
16. After adding goals you can also add/remove competencies, use one of the following guides to edit/copy competencies:  
*Manager- Add Pre-defined Competencies*  
*Manager- Copy Competencies*  
If no changes are needed, select **Submit** to complete this process.

UTEP Performance Evaluation

## Define Criteria - Update and Submit

Jorge Lopez  
Actions

15 16

Print | Notify

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