My UI Career Instructions

Intent of Goal Plan
The intent of the Goal Plan is to encourage you to revisit your plan and note accomplishments and progress or to add general comments throughout the year. This is not a static document! Your Goal Plan
should be viewed as a conversation starting point for supervisors and staff. The key word is “Plan”. If you were building a house you wouldn’t look at the plans only when you started construction and again at the end to see how you did. Instead you would constantly read the plans to track and make changes when needed. The Goal Plan can be viewed as the blueprint for the year’s activities and for maintaining a plan of action.

My UI Career has tools and supports systems that encourages using the SMART model for developing goals. The SMART model creates goals that are:

- Specific
- Measurable
- Attainable
- Relevant
- Timely

My UI Career offers three tools to help you create goals for your Goal Plan. The tools are:

- Goal Wizard – The Goal Wizard will provide a step-by-step guide for creating a SMART Goal
- Create a New Goal/Library for Developing a Goal – When writing a goal you will have access to a library of goals that you can use or edit to fit your requirements
- Create a New Goal/Develop a Goal – Provide access to the appropriate fields required to enter goals into My UI Career

My UI Career also provides convenient methods to note accomplishments and/or progress made in attaining goals. This includes:

- Dates
- Action Plans
- Status
- Comments

**Entering Goal Plan as an Employee or Supervisor**

**As an employee**, you can easily access your Goal Plan by clicking on the Goal Plan link on the home page of My UI Career.

As a supervisor you can open a staff member’s Goal Plan by locating the staff member in the My Team tile and clicking on the Actions link.
From the Actions link menu, click on Goal Plan to open the staff member’s Goal Plan.

Adding Goals to Goal Plan
There are a few ways to add a goal to your Goal Plan. The first step is to click on the Add New link at the top right of the screen.

The drop down menu presents you with three options:

- **Create a New Goal** – If you are experienced in using My UI Career and need to add new goals, this is the tool to use
- **Goal Wizard** – If you are a new to My UI Career this step-by-step guide for writing goals is your best choice
- **Copy from Other Goal Plan** – If you need to use a goal form a previous Goal Plan, this is a quick and easy way to copy goals

We will look at the goal tools starting with the tool that provides the most support for new users.

**Goal Wizard (Best for New Users)**
The Goal Wizard uses a short series of individual screens to assist you in creating a SMART goal. To access, click on Add New and select Goal Wizard:
A SMART goal has five components; Specific, Measurable, Attainable, Relevant, and Time-bound. The Goal Wizard will assist you in addressing each one.

**Goals need to be Specific**
As a best practice, a goal needs to be specific. When you start writing the goal the Wizard will recognize action words or subject key words and provide you with suggestions from the Goal Library. You can accept a suggestion by clicking on it then editing the suggestion to fit your specific requirements. One tip provided by My Career is to make goals clearly state what you want to happen.

**Measurable Goals**
The next component helps you account for the successful completion or progress toward a goal. If a goal cannot be measured, how can it be managed? By establishing the criteria for a goal you can measure the progress of achievement. If you used the Goal Library to create a goal, a measure will also be suggested. In addition, the goal will be displayed at the top of the dialog box for your review. You can also write your own measure or indicator of success. Whatever method you use, when the measure is done, **click on the next button to continue.** Using the keyboard **enter key** will not advance you to the next screen and will **erase the measure** you just entered.
Attainable Goals
The next component asks “Is the goal attainable?” Writing a good goal is a balancing act between making the goal too easy to achieve and making it too hard. If the goal is too easy it doesn't provide an opportunity to grow. If a goal is too hard to achieve, it will be hard to remain committed to it. The best way to determine the right balance is for staff and supervisor to continue conversations about goals throughout the year.

If the goal is not attainable, you can go back and edit the goal and indicator of success.

Is the Goal Relevant?
A well-written, specific, measurable, and attainable goal still needs to be aligned with the mission of your unit, department, and/or university. A goal also has to be in line with the requirements or expectations of the position. When answering if the goal is relevant, please keep mission, unit goals, and your position in mind.

Time-Bound, Goal Deadline
We all must meet deadlines in our daily work. Goals also need to have a concluding date. In our example, the goal states that a system needs to be in place by the middle of the fiscal year. The Time-bound component assures that the SMART goal you have written has a concluding or finishing date. You can enter any start and end dates that reflects reasonable expectations. If it is reasonable that a goal may take more than year or extend over more than one evaluation period, you can enter an end date that extends into another evaluation period.
Completed SMART Goal
At this point your SMART goal is displayed in one screen:

You now have two options. You can either:

- Add More Details

or:

If you click the Add More Details button you will be able to edit what you have already done, run spell check, run a legal scan, add an action plan, indicate status, or add comments using Goal Progress. You may choose to use any or all of these features.

Save and Close
Once you have completed writing the goal click on the “Save & Close” button.

The new goal will now appear goal page.
Writing Goals with Create a New Goal and Goal Library

If you are already familiar with writing a SMART goal, you may skip the Goal Wizard and go directly to the Goal Library. From the Goal Plan page click on the Add New and select Create a New Goal from the drop down menu.

Two options are displayed: Develop a Goal, and Library for Developing a Goal. The “Library for Developing a Goal” is a good tool intermediate users or experienced users who need to create a new goal.

Open Goal Library

When you click on the “Library” button job categories are listed. The library goals are written using the SMART model and start with an action. While these may not be exactly what you need, they do provide a starting point for editing.
The goal statements are broken down further under each heading. Under the heading not only is the goals statement present but the measure or indicator of success is paired with goal statement.

**Selecting/Editing Goal and Measure**
When you find a goal and associated indicator of success that matches or is close to your requirements, select the checkbox next to it and then click on the “Add Selected Goal” button.

Because the goal and indicator of success came from the library they may not be exactly what you need. In this screen you can edit the goal to better suit your requirements and edit the Measure of Success that best reflects that the goal has been attained. At this time you can also adjust start/due dates, add and Action Plan, or add a comment before clicking the “Save Changes” button.
When you click on the Save Changes button your goal is saved and is now displayed in your Goal Plan.

Writing Goals with Create a New Goal and Develop a Goal

If you don’t need to use the Goal Wizard or Library for Developing a Goal you can work directly on a goal by clicking on the “Develop a Goal” button.

By clicking on the Develop a Goal button the Add Goal screen opens and you can enter your goal and the indicator of success. These two items are the only things that are required.
Other fields that you can complete include start date, due date, and/or add an action plan.

To save your new goal, click on Save Changes.

**Copy from Other Goal Plan**

The final option for creating a goal relies on that there are goals from other goal plans that you can copy and edit as needed. Click on Add New and select Copy From Other Goal Plan from the drop down menu.

If a previous goal addressed a key performance issue, used a reliable performance indicator, and it is a goal that is still relevant, you can simply copy the goal from the existing Goal Plan and include it in a new Goal Plan. You could also use this much like a library goal in that you can copy it into your new Goal Plan then edit the goal to fit your current needs.
The first step is to select a performance goal plan.

Click on the Next button.

Select the goal(s) you want to copy.

Click copy button.

The goal you selected to copy has now been added to the Goal Plan and can be edited or modified to suit your needs.

**Common Features/Options for All Goals**

The information entered during the creation of a goal has a direct relationship to the effectiveness of the performance review. Supplying complete information will allow for more robust conversations during the year and produce a more meaningful performance review.

All goal tools, Goal Wizard (when you click on Add More Details), Create a New Goal (either Develop Goal or Library for Developing a Goal), or Copy from Other Goal Plan lead to the following screen:
The information you entered using the goal tools (goal and indicator of success) will be displayed in the form. The lower part of the screen under the Measure of Success are several fields that can assist you in developing a well-rounded goal that will facilitate ongoing conversations.

This additional information includes:

- Start and Due Dates
- Action Items/Plan
- Comments/Notes
- Status

**Start/Due Dates**
If you have not assigned start and end dates associated to a goal you can enter them here. If you used the Goal Wizard tool and entered dates, they will be displayed here.

<table>
<thead>
<tr>
<th>Start Date:</th>
<th>06/01/2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date:</td>
<td>01/15/2014</td>
</tr>
</tbody>
</table>

**Action Plan**
If your goal uses an Action Items you can click on the Add Action Plan button.

You can enter the step or action required in the text box, set a due date, adjust the percentage of completion of the step or action and add steps or actions by clicking on the 'plus' button. You can build the entire plan here and revisit as needed.
Comment/Note

Whether or not you use any of these additional information tools, you are highly encouraged to use the comments section. Throughout the year you can add and date comments that relate to your specific goals. You can highlight benchmarks, document distractions, note accomplishments, or note others projects that interrupted progress on a goal. The comments section remains open until the formal performance review begins. There is a place for comments in the performance review, but that is intended for a summary, not an ongoing documentation of accomplishments. Using the comments section here allows for an ongoing review of goals and measures. When you are writing your Performance Review you can always open your Goal Plan comments/notes to refresh your memory.

To add a comment you will need to scroll down in the Edit Goal dialog box to reveal the Add Comment button.

Clicking the Add Comments button opens the comment box where you can make notes or add comments.

The last step is to click on the green plus button to add the comment or the red x to exit the comment box and not save your comments.

Once you are satisfied that everything you need has been completed you can click on the Save and Close button.

Status

We all know things can change over the course of a year. The Status indicator is a flexible tool that allows you to show progress or to indicate that a goal is no longer applicable.
Cascade a Goal
As a supervisor, if in your goal plan you have a goal (or a reworded version of a goal) that you would like to share or distribute the responsibilities with your staff, you can cascade a goal. First you need to navigate to your goal plan and select the goal you would like to cascade to staff.

After selecting a goal, click on the cascade button above the goals in your goal plan.

When you click on Cascade Selected your name and the name(s) of your direct reports will be displayed. Select the name(s) of the direct reports that you wish to cascade the goal.

Once you have selected the names click on the Next button to continue.

Clicking the next button does not cascade the goal but instead open the edit goal dialog box. This is the same goal edit interface that you have worked with while creating goals. At this time you can edit the Goal, the indicator of success or any of the optional features found in all goals.
Once you have edited the goal you can now cascade the goal and share it with direct reports by clicking on the Cascade button.

In your display you will now see under the original goal THAT YOUR GOAL HAS BEEN ALIGNED WITH YOUR STAFF MEMBER.

Clicking on the goal linked text under the staff member's name, will open that staff member's Goal Plan.

**Managing Your Goal Plan**

Now that all of the goals have been written and saved we need to manage the Goal Plan. This includes updating goals, changing status, adding comments, and potentially editing or adding goals or accomplishments. We manage the goals from the same screen where we first created and saved our goals.
Editing a Goal
To edit a goal, click on the edit button found at the end of the goal statement,

![Edit button](image)

This will open the Edit Goal window. The Edit Goal window uses the same tool you used when you create the goal.

![Edit Goal window](image)

If you make significant changes to the goal you can click on the Save as New button and create a new goal.

Any changes or edits are recorded and can be viewed by opening the Action tool (far right side of goal) for that specific goal, and selecting View Goal Detail.
The Detail view of the goal includes the goal, measure, and any additional information that may have been added such as start/due dates, Action items, Comments/Notes, and Status. In addition there is an Audit History that dates all changes, the action taken and who made the change.

**Dates and Status**

If the goal has a start and due dates, those dates are in the column following the Measure of Success which is followed by Status.

<table>
<thead>
<tr>
<th>Measure of Success</th>
<th>Start Date</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td># of processes converted to an online process</td>
<td>04/01/2015</td>
<td>03/31/2016</td>
<td>Status not recorded</td>
</tr>
</tbody>
</table>

The list of goals listed in the Goal Plan can be arranged and rearranged by clicking on any of the column headers.

**Adding Comments to a Goal**

Comments can be added to a goal when the goal is created, but it is a best practice to add comments to goals throughout the year to track progress, record benchmarks, or leave notes that can assist during the Performance Review.

To leave a comment on one a goal open your Goal Plan.
Once you are in your Goal Plan click on the edit link for the goal to add a comment.

To add a comment, click the Add Comment button, when the Edit Goal dialog box opens.

Clicking the Add Comments button opens the comment box where you can make notes or add comments.

When it is time to write your Performance Review you can open any of your goals and view your comments/notes to help write your summary comments for the review.