



ACHIEVEonline USER GUIDE FOR EMPLOYEES

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ACHIEVEonline USER GUIDE FOR EMPLOYEES

This user guide is intended to help employees navigate ACHIEVEonline. Managers should read and understand this employee user guide prior to using the manager user guide.

ACCESS ACHIEVEonline

To access ACHIEVEonline, go to the ACHIEVEonline information landing page at hr.uci.edu/partnership/achieveonline and click the GO TO ACHIEVEonline button. You will be directed to the UCInetID login page.

From the login page:

1. Enter your username and password.
2. Click the login button.
3. You will be taken to the ACHIEVEonline Welcome page.
4. Employees will see two tabs: Home and Performance.
5. Managers will see three tabs: Home, Performance and Reports.

INSTRUCTIONS FOR EMPLOYEES

(Managers should read this section before moving on to the Manager's section)

Under Home, there is a single dropdown menu choice:

WELCOME

The WELCOME page is your main page and includes quick links to all the important functions of the ACHIEVEonline system:

MY GOALS
QUARTERLY CHECK-IN(S)
USER GUIDE
YOUR CHECK-IN(S)
YOUR INBOX

In the upper right hand corner of your screen, there is a HELP button that features a robust database of useful information.

Return to the WELCOME page any time you need to get your bearings.

PERFORMANCE TAB

There are two dropdown menu choices from the PERFORMANCE tab:

MY GOALS
QUARTERLY CHECK-IN



[Log Out](#) | [Help](#)

[Home](#)
[Performance](#)

[My Goals](#)
[Quarterly Check-in](#)

WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM

MY GOALS

QUARTERLY CHECK-IN(S)

USER GUIDE

YOUR CHECK-IN(S)

	Due Date
2018 January Quarterly Check-in	12/31/2017

YOUR INBOX

No Items

[CONTACT](#)

11.01.17 January Check-In Opens

11.01.17 - 12.31.17 Employee and Manager Feedback Period

12.31.17 Employee Self Check-In Due

12.13.17 - 01.31.18 Manager Completes Check-In; Employee and Manager Discussion Period

01.31.18 January Check-In Closes

MY GOALS

Use this section to view, create, edit and/or assign progress to your goals.

Performance

[Home](#) > [Goals](#) > [My Goals](#)

My Goals

[Create](#)
[Options](#)

47%

TOTAL COMPLETE
 Total Weight: 150%
 My Goals

My Goals

Current Period

10/1/2017

12/31/2017

Search

☐ Display Cancelled
 ☐ Hide Completed

Send Approval Request

My Goals

45%

Analyze Budget Activity
 Status: Pending Modification Approval Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%



NOTE: All fields marked with an asterisk are required fields, with the exception of the WEIGHT field, which is marked as required, but will not currently be required for UCI staff members. If you elect not to weight your goals, you should enter a value of 0 (zero.) If you elect to weight your goals, total weight does not have to add up to 100.

MORE ABOUT WEIGHTING GOALS & MILESTONES

Weight is really meant to identify goal priority and importance. For example, a higher weighted goal indicates a higher priority goal. If you elect to use the weighting function for goals, please be aware that the TOTAL COMPLETE dial on your MY GOALS page is an indication of the progress toward your goals and is calculated using the weight of each goal, if any, and the progress of each goal during the current check-in period.

However, if you enter MILESTONES in support of your goals, you must enter weights. The MILESTONE weighting field accepts any numerical value, including zero. While weighting is required for milestones, you may use zero as a value if you do not want to use the weighting function at this time. Weighting for MILESTONES must add up to 100.

CREATE GOALS

Create Goals

Goal planning is the foundation of ACHIEVE. When employees have direct line of sight between their performance and the goals of the organization, they understand the important role they play in helping the organization achieve success. Goals can be created, edited and canceled at any time during the quarter. Goals don't have to be completed within one quarter. Goals will automatically appear on the quarterly check-ins that correspond with the goal start and/or end dates. This is where goal planning occurs. To provide feedback on goals, go to the Quarterly Check-in page.

Additional resources are also linked below:

- UCI Strategic Goals: <https://strategicplan.uci.edu/>
- Links to Department Strategic Goals: <https://strategicplan.uci.edu/unit-plans/index.php>

All fields marked "*" are required

Title *

Title

Description

B I U S I_x | | | | | | | |

Start Date 10/19/2017 **Due Date *** 12/31/2017 **Weight *** 0

Goal Type *

Select

Milestone

Add Milestone

Attachments

Choose File

Upload up to 5 attachments. Maximum upload 2mb

Assignment *

● Yourself



Follow these steps to create a new goal:

1. Click the CREATE button.
2. Enter the title of one of your goals.
3. Enter a brief description of the goal.
4. Enter a start and end date for the goal.
 - Q. What if I don't have an end date for my goal?
 - A. You must have an end date for your goal. All goals should be SMART goals – specific, measurable, agreed upon, realistic, and time bound.

NOTE 1: The order in which you enter your goals is not important. However, you may want to note that the first goal you enter will appear at the bottom of your goals list.

NOTE 2: You can create/add as many goals as you would like; however, you must have at least one active goal. We recommend not having more than five active goals active during any check-in period.

NOTE 3: Goals can be created/added at any time, and goals not completed during a check-in period roll over into the next check-in period.

ADD WEIGHT PERCENTAGE - OPTIONAL

Per the information discussed above regarding weighting of goals, enter goal weighting if desired, or enter a value of zero (0).

SELECT A GOAL TYPE

Start Date 10/19/2017 **Due Date *** 12/31/2017 **Weight *** 0

Goal Type *

Performance Goal ▼

Select

✓ Performance Goal

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Assignment *

☒ Yourself



Medical Center employees have two goal type options – CEMRP goals and non-CEMRP goals. Both types of goals should be entered into the ACHIEVEonline system, while HR Connect will continue to be the system of record for the formal establishment of CEMRP annual incentive objectives, as well as the evaluation and approval of objectives results. Including them in quarterly check-in discussions will help ensure progress is reviewed regularly throughout the fiscal year.

For campus and health sciences employees, there is only one type of goal – PERFORMANCE GOAL.

ADD MILESTONES

A screenshot of the "Add Milestone" dialog box. It has a title bar with "Add Milestone" and a close button (X). Below the title bar is a "Description" label followed by a large text input field. Underneath the description field are three fields: "Start Date *" with a calendar icon and the date "10/19/2017", "Due Date *" with a calendar icon and the date "12/31/2017", and "Weight *" with a text input field containing "0" and a percentage sign "%". At the bottom right are "Cancel" and "Done" buttons.

Milestones break your goal into manageable tasks/activities. If you choose to use the milestones field, enter description, start date and due date. Please note that the due date must be within the goal date range. Again, the weight field is optional (even though it is marked with an asterisk), and all notes about the weight value described above, apply.

NOTE 1: You can add as many milestones as you want. To edit or delete a milestone, click on the dropdown to the right.

NOTE 2: If you enter milestones, you must enter weights. As a point of clarification, weights indicate priority of milestone, e.g., the higher the weight, the higher the priority of the milestone. The total of all weights entered must equal 100 percent (automatically calculated by the system).

ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) per goal.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

ASSIGNMENT

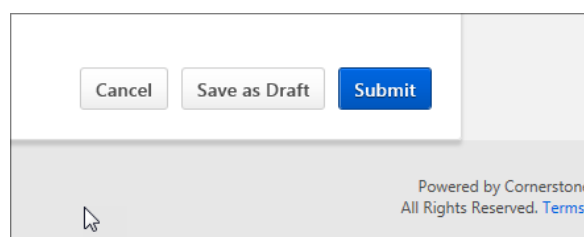
Employees will see only one option under ASSIGNMENT, and that is YOURSELF. All goals you create must be assigned to yourself. You cannot assign goals to anyone else at this time.



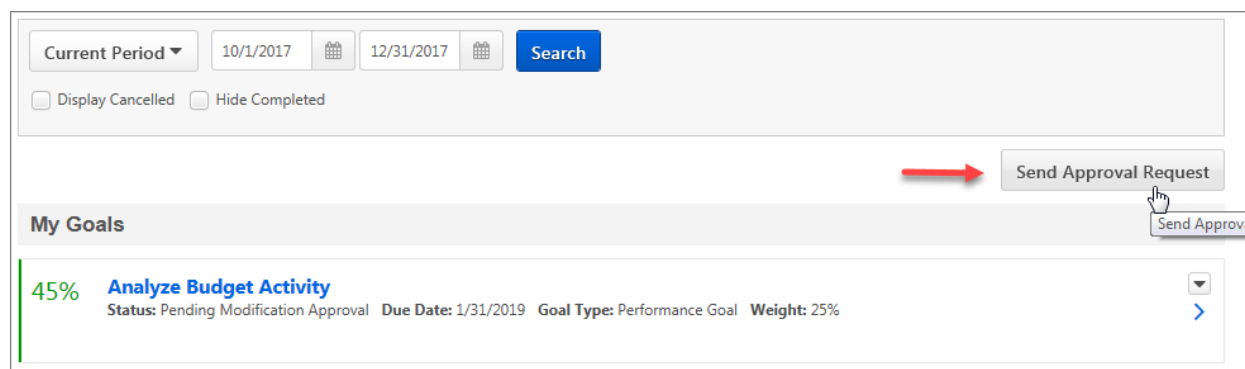
SAVE OR SUBMIT

Once you have entered your goal and related information, you may either:

- SAVE AS A DRAFT; this allows you to come back to your work at a later date without submitting the information to your manager
- SUBMIT; this option automatically sends a request to your manager's ACHIEVEonline inbox for approval by your manager



On the right hand side, near the bottom of the upper half of the page, you will see a SEND APPROVAL REQUEST button (see screenshot below). Our vendor cannot remove this button at this time, but the button does not function. If you click it, it does nothing. We are working to either have the button removed or implement the email notification functionality. Thank you for your understanding.



Once you save or submit, the system will return you to your MY GOALS page.

MY GOALS PAGE

At the top of the page you will see a real-time TOTAL COMPLETE indicator. This number (percentage) represents your total progress towards all goals. All notes under Weighting Goals and Milestones apply.



My Goals

Create Options

0%

TOTAL COMPLETE
Total Weight: 100%
My Goals

My Goals

Current Period

10/1/2017

12/31/2017

Search

☐ Display Cancelled
 ☐ Hide Completed

Under the indicator you will see one tab option:

MY GOALS

This tab opens a page that displays all goals assigned to you. Only the goals that fall within the current quarterly check-in period will be shown. If you want to view or edit a goal outside the current check-in period, choose the CURRENT PERIOD drop-down menu and select another check-in period. Alternatively, you may view outside the current period by entering a date range in the fields to the right of the CURRENT PERIOD field. In addition, you can choose to view cancelled goals and/or hide completed goals. To return to the current period, simply go to the CURRENT PERIOD dropdown menu and select current period.

Goals

My Goals

My Goals

Create Options

47%

TOTAL COMPLETE
Total Weight: 150%
My Goals

My Goals

Current Period

10/1/2017

12/31/2017

Search

☐ Display Cancelled
 ☐ Hide Completed

Send Approval Request

My Goals

45%

Analyze Budget Activity

Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

100%

Develop New Financial Reporting Policy for Contracts and Grants

Status: Completed Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 50%

0%

Document, track and drive performance

Status: Not Started Due Date: 10/30/2017 Goal Type: Performance Goal Weight: 25%



NOTE: Your manager has full access to your MY GOALS section and can perform any and all of the same functions that you can perform in this section. If something changes, and/or you see a new goal assigned to you, and you did not make the change(s), check the VIEW HISTORY function that is a dropdown option from the dropdown button to the far right of each goal to see if your manager has made changes. Please discuss any changes that you do not understand with your manager.

STATUS OF GOAL

The status of a goal is indicated as follows:

DRAFT – indicated by the color black
 PENDING – submitted to manager, pending (awaiting) approval; indicated by the color beige
 NOT STARTED – indicated by the color gray
 ON TRACK – indicated by the color green
 BEHIND – indicated by the color yellow
 COMPLETED – indicated by the color blue
 CANCELLED – indicated by the color green

(NOTE: Green is also used for goals that are on track. The system considers a cancelled goal to be on track since you, as the user, have set the cancelled status.)

GOAL ACTIONS

Depending on the status of each goal, you will have different options available for managing that goal. The dropdown button on the far right of the goal section will show you the options available.

Current Period ▼ 10/1/2017 12/31/2017 Search

☐ Display Cancelled ☐ Hide Completed

My Goals

45%	Analyze Budget Activity Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%	▼
100%	Develop New Financial Reporting Policy for Contracts and Grants Status: Completed Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 50%	▼
0%	Document, track and drive performance Status: Not Started Due Date: 10/20/2017 Goal Type: Performance Goal Weight: 25%	▼

EDIT
 COPY
 DELETE
 CANCEL
 ADVANCE
 VIEW HISTORY
 ADD A COMMENT



EDIT

Select this option to change anything related to your goal including title, description, start date, end date, milestones, etc.

COPY

Goals can be copied using the dropdown option located to the far right of an individual goal field.

Q. Why would I want to copy a goal?

A. If you have two goals that are similar, you can copy one and paste it into the description field of the new goal to save time and effort.

DELETE

This function is self-explanatory. If the goal is in draft form (never submitted to manager for approval), it can be deleted. Please be advised that once you delete a goal, it cannot be recovered.

CANCEL

If a goal has been submitted to your manager for approval – whether or not it has already been approved by your manager – you must cancel the goal, rather than delete the goal, if you want to remove it from the system. If you use the cancel function, you have the ability to view all cancelled goals using DISPLAY CANCELLED. Click the DISPLAY CANCELLED checkbox that is located under the CURRENT PERIOD dropdown near the top of the page under the MY GOALS tab.

NOTE: If tasks have been completed for a goal that you are now cancelling, and you want to be credited for the task(s) you completed, use the EDIT function and change the existing due date to the date you are cancelling the goal. Save the edited, updated goal rather than cancelling the goal. Make a note in the comments section that the goal has been cancelled on this particular date but tasks were completed and therefore archived for the check-in discussion. This will ensure that the task(s) are visible to both you and your manager for the check-in discussion.

ADVANCE

This function allows you to roll an approved goal forward into the next check-in period, IF THAT GOAL HAS EXPIRED. Click ADVANCE and enter your new start and end dates (which must fall within the next quarterly check-in date range) for the goal(s) you are advancing. Using this function will automatically reset the status of the goal to ON TRACK. Like any other edit, ADVANCING a goal requires manager approval, so click SUBMIT after making your changes.

VIEW HISTORY

You can also view history of any goal, e.g., when the goal was created, updated, cancelled, etc.

Also, on the far right of each individual goal section is a right-pointing carrot (arrow) that allows you to open and expand the goal.



☐ Display Cancelled ☐ Hide Completed

My Goals

45%

Analyze Budget Activity
Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

▼

Description:
Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

	Description: Develop report template and present to unit leader for approval. This includes identifying pertinent data to be reported on.	Start Date: 11/1/2017	Due Date: 12/31/2017	Weight: 10%	Progress: <input type="text" value="100"/>
	Description: Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	Start Date: 1/1/2018	Due Date: 12/31/2018	Weight: 70%	Progress: <input type="text" value="50"/>

[Show All \(3\)](#)

Attachments

[Choose File](#)

Upload up to 3 attachments. Maximum upload 1mb

Comments

Bob Lee commented 10/20/2017 3:21 PM

Things are going well; however, if we don't get additional resource, may miss important due date.

[Add Comment](#) [Close](#)

Once you have expanded the goal, you can choose from the dropdown menu (also located in the far right) to:

ENTER PROGRESS

Enter goal progress as a percentage. If one or more tasks have been assigned to the goal, you will enter progress for each task. If not, you will enter progress above the Description field. The goal progress determines the status of the goal, including status of goal color indicator as described above.

NOTE: The TOTAL COMPLETE dial on your MY GOALS page is an indication of the progress toward your goals and is calculated using the weight of each goal, if any, and the progress of each goal during the current check-in period.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.



ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) per goal.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

ADD A COMMENT

Comments are helpful for entering project updates, e.g., changes in scope, changes in deliverables, status updates, feedback from meetings, notes on additional resources needed, etc. Comments can be viewed in your quarterly check-in summary, as well.

NOTE TO MEDICAL CENTER EMPLOYEES

All medical center employees must enter their three (3) CEMRP goals, in addition to any other goals. At this time, it is recommended that medical center employees copy their CEMRP goals from the HR Connect system and paste them into the ACHIEVEonline system to minimize duplication of work/effort.

In addition to your CEMRP goals, you should have at least one to five other performance goals.

GOALS MARKED WITH AN ASTERISK

Any goal marked with an asterisk indicates that the goal has been cascaded down (assigned) by your manager. This means your manager owns the goal and your goal actions are limited. In terms of goal actions, you are only able to copy and view history for this goal.

0%	Earn professional certification	Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>
50%	* Engagement Plan	Status: On Track Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>
0%	New Goal	Status: Not Started Due Date: 10/24/2017 Goal Type: Performance Goal Weight: 50%	>
10%	* Update technology documentation each month	Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%	>

MORE ABOUT CASCADING OF GOALS

Some of your goals may be goals directly related to higher level organizational goals, as defined by your manager. In these cases, your manager may elect to “cascade” goals down to you and/or other employees on your team. Cascaded goals are linked to both you and your manager. Cascading goals allows your manager to ensure alignment between the organization’s objectives and your goals and activities, directly relating your efforts towards the common goals of your unit and/or UCI.



PRINTING FROM THE SYSTEM

If you would like to print your goals, go to the OPTIONS button in the upper right corner of the MY GOALS page and choose the DOWNLOAD PDF – MY GOALS option. This will convert your information to a PDF that you can then save and/or print.

QUARTERLY CHECK-INS

From the navigation bar at the top of your screen, select PERFORMANCE/QUARTERLY CHECK-IN.

The screenshot shows the ACHIEVE online interface. The top navigation bar includes 'Home' and 'Performance'. A dropdown menu under 'Performance' shows 'My Goals' and 'Quarterly Check-in' (selected). The main content area is titled 'WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM'. It features three icons: 'MY GOALS', 'QUARTERLY CHECK-IN(S)', and 'USER GUIDE'. Below these icons is a timeline of events:

- 11.01.17 January Check-In Opens
- 11.01.17 - 12.31.17 Employee and Manager Feedback Period
- 12.31.17 Employee Self Check-In Due
- 12.31.17 - 01.31.18 Manager Completes Check-In; Employee and Manager Discussion Period
- 01.31.18 January Check-In Closes

 To the right, there are two sections: 'YOUR CHECK-IN(S)' showing a table with one entry '2018 January Quarterly Check-in' due on 12/31/2017, and 'YOUR INBOX' showing 'No Items'. At the bottom right is a 'CONTACT' link.

You will see the Quarterly Check-In landing page. Your currently assigned check-in(s) will be displayed on this page.

The screenshot shows the 'Quarterly Check-in' search results page. It includes a search bar with 'Title:' and 'Type:' (set to 'All Types') and a 'Search' button. Below the search bar is a checkbox for 'Show completed and expired tasks'. The results are displayed in a table:

Title	Description	Status	Start Date	Due Date
2018 January Quarterly Check-in	Quarterly Check-in: Jan FY18	Not Started	10/19/2017	12/31/2017

 The table indicates '(1 Result)'.



If you want to view prior check-ins, click on SHOW COMPLETED AND EXPIRED TASKS. You may want to reference a previously completed check-in to copy and paste information, review a task(s), etc.

NOTE REGARDING THE SEARCH FUNCTION

The SEARCH function on the QUARTERLY CHECK-IN page is not operable at this time. Our vendor cannot remove the search boxes at this time. We are working to either have the function removed or implement the SEARCH function at a later date. Thank you for your understanding.

Normally you, as an employee, will only see one check-in at a time. To provide your feedback for your quarterly check-in, click on the quarterly check-in title in your assigned check-ins section. This will open your quarterly check-in.

A screenshot of the "2018 January Check-in" page. The page has a left sidebar with three options: "Overview" (selected), "Goal Feedback", and "Discussion Questions". The main content area shows the user's name "Bob Lee", title "ACCOUNTANT 3", and date range "10/1/2017 - 12/31/2017". A circular progress gauge shows "50%". Below this is an "Overview" section with a welcome message and instructions. At the bottom, there is a "Review Step Progression" section with two steps: "Employee's Self Check-in" (due 12/31/2017) and "Manager Feedback". A "Get Started" button is at the bottom right. Red arrows point to various elements: the sidebar, the "Options" dropdown, the progress gauge, the "Overview" heading, and the "Get Started" button.

At the top you will see your name, title, date range of the quarterly check-in, photo (if you have uploaded one), and a percent gauge. This percent gauge shows you percent completed on the check-in form only.

NOTE: Please note the percent gauge will display 50% if you click to any section on the form whether or not you have added any information. This is a function of the application and we have asked the vendor to modify this function to accurately represent form completion or remove the function entirely.



When you first bring up the QUARTERLY CHECK-IN page, please read the OVERVIEW. This will provide you with important information regarding the check-in process.

OPTIONS BUTTON

From the OPTIONS button in the upper right of your screen, you can:

ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) to the check-in.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

There are two steps to completing the check-in form.

PRINT CHECK-IN

NOTE: The term PRINT REVIEW should read PRINT CHECK-IN, however, the vendor is unable to re-configure this selection title at this time. Thank you for your understanding.

First, you complete and submit your self check-in.

Second, your manager completes and submits your check-in.

COMPLETING YOUR SELF CHECK-IN

Click the GET STARTED button or choose a section to complete using the navigation menu on the left.

In the left navigation there are two sections:

NOTE: The term Review Step Progression at the bottom of the Check-in Overview page should read Check-in Step Progression. However, the vendor is unable to reconfigure this selection title at this time. Thank you for your understanding.

GOAL FEEDBACK

Use this section to input the progress you have made on each goal.



Analyze Budget Activity

Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of analysis and either continue or discontinue.

Progress:**45%**

Status: On Track

Start Date: 11/1/2017

Due Date: 1/31/2019

[more...](#)

Comments:

Use this space to enter feedback on this goal.

DISCUSSION QUESTIONS

Use this section to input your answers to the four required check-in discussion question boxes.

Discussion Questions

Please provide feedback to each discussion question below. Remember the following:

- Input should be complete but not necessarily lengthy or formal. Brief sentences, bullets or phrases are sufficient.
- Every feedback section requires input. If you have no feedback for the quarter, enter "N/A", no comment or something comparable.
- Click on the Options button at the top of the screen to attach documents, view feedback, upload to a PDF, or print the check-in.
- When you have finished entering comments, save or submit the check-in. Once you submit, your input will be visible to the employee/manager. You may edit your input and resubmit as many times as you'd like until the check-in closes. Once the check-in closes, it is no longer editable. See the Welcome Page for this quarter's closing date.

The Merit Criteria Guides below provide definitions for the merit criteria terms contained in the feedback questions.

Merit Criteria Guide for Individual Contributors: [click here](#)

Merit Criteria Guide for People Managers: [click here](#)

* The dial at the top of the screen indicates the check-in completion rate.

What are you most proud of and what additional accomplishments have you achieved in this check-in period?

Comments: *

This is where you will enter feedback to discussion questions.

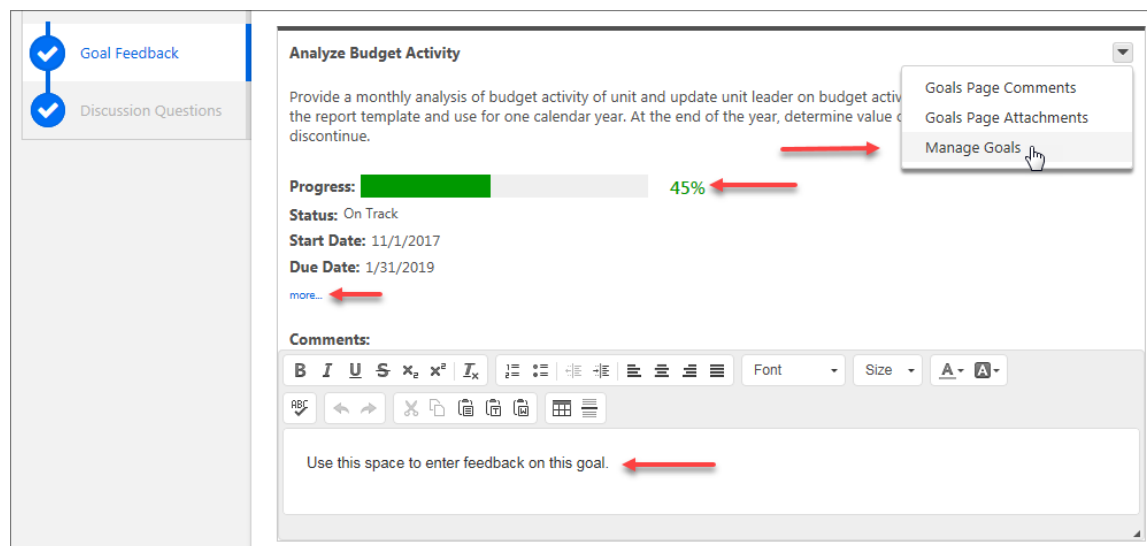
You should be going in and out of your quarterly check-in on a regular, ongoing basis rather than waiting to provide feedback and answer questions in a single session. Using the ACHIEVEonline application on a regular basis means that you will be ready to submit your check-in form on-time and without spending a lot of time close to the check-in due date.



MORE ON GOAL FEEDBACK

There are two important functions you will perform in this section:

1. Input progress (as a percent of completion) you have made on each goal.
2. Enter feedback on each goal.



As a reminder, to add, edit or cancel a goal, you will need to use the MY GOALS page.

You will see a progress bar near the top of each goal section. The color used in the bar corresponds to the colors used for the status indication in the MY GOALS section. To update your progress on a goal, use the MANAGE GOALS option in the upper right dropdown menu. As a reminder, the colors represent the following:

DRAFT – indicated by the color black
 PENDING – submitted to manager, pending (awaiting) approval; indicated by the color beige
 NOT STARTED – indicated by the color gray
 ON TRACK – indicated by the color green
 BEHIND – indicated by the color yellow
 COMPLETED – indicated by the color blue
 CANCELLED – indicated by the color green (NOTE: Green is also used for goals that are on track. The system considers a cancelled goal to be on track since you, as the user, have set the cancelled status.)

Use the SHOW MORE button to show milestones (aka tasks) you have previously entered for a goal.

Use the dropdown menu in the upper right of each goal summary to enter and/or view:

GOALS PAGE COMMENTS

You can view any comments you or your manager previously entered on your MY GOALS page.

GOALS PAGE ATTACHMENTS

You can view any attachments you or your manager previously entered on your MY GOALS page.



MANAGE YOUR GOALS

This is where you will enter your progress towards goals (in terms of percent completed.) In addition, you can attach documents (files), and add a comment. Using this section for these three functions saves you from having to go back to the MY GOALS page.

Manage Goals

45%
Analyze Budget Activity
Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

Description:
 Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

	Description:	Start Date:	Due Date:	Weight:	Progress:
	Develop report template and present to unit leader for approval. This includes identifying pertinent data to be reported on.	11/1/2017	12/31/2017	10%	100
	Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	1/1/2018	12/31/2018	70%	50

Show All (3)

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Comments

Bob Lee commented 10/20/2017 3:21 PM
Things are going well; however, if we don't get additional resource, may miss important due date.

Add Comment

Done

You must enter feedback on every goal. If you do not have anything to report, simply put N/A or something similar in the COMMENTS field.

When you have finished defining progress toward goals and entering any comments, click the DONE button.

When you have finished entering goal feedback, choose one of the following actions:



SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page
SUBMIT; this option will appear if you have entered comments for all goals, and you have entered feedback for all four discussion questions; you should choose the SUBMIT function only when you are ready for your manager to review your check-in [used semicolons to stay consistent throughout document]

Goal Feedback

Discussion Questions

Implement New Reporting Segment of Accounting System

Work with stakeholders to identify needs and identify possible vendors. Work with group to implement new system.

Progress: 52%

Status: On Track

Start Date: 10/19/2017

Due Date: 11/30/2018

Comments:

Use this space to enter feedback on this goal.

Back Save and Exit Save and Continue Submit

DISCUSSION QUESTIONS

Use the comment fields to enter your feedback on each of the four required discussion questions.

Overview

Goal Feedback

Discussion Questions

What additional information, knowledge, skills, resources do you need to master your job and accomplish goals?

Comments: *

Additional training on new budget and planning system.

Understanding of future state of budget process.

What would increase your job satisfaction and success?

Comments: *

I'd like to serve on a campus-wide workgroup. This will allow me to network with people outside of our department, and become familiar with areas outside of my own.

Back Save as Draft and Exit Submit



When you have finished entering your feedback on each discussion question, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SUBMIT; this option will appear if you have entered comments for all goals, and you have entered feedback for all four discussion questions; you should choose the SUBMIT function only when you are ready for your manager to review your check-in.

NOTE: Once you click SUBMIT, you will be returned to your QUARTERLY CHECK-IN page. To return to your MY GOALS PAGE, choose PERFORMANCE/MY GOALS.

AFTER YOU SUBMIT YOUR CHECK-IN

Once you have submitted your check-in, no further action is needed. However, if you wish to go back in and modify your answers to your discussion question, you may do so until your in-person quarterly check-in discussion date with your manager or until the quarterly check-in closes. See the WELCOME page for close date.

TO RECALL A SUBMITTED CHECK-IN

If you need to recall your submission, go to PERFORMANCE/QUARTERLY CHECK-IN. You will see your QUARTERLY CHECK-IN page. You will not see the submitted check-in. To view the check-in you submitted, click the SHOW COMPLETED AND EXPIRED TASKS button. Previously submitted and/or completed check-ins will appear.

Click on the check-in you want to edit. You will see a warning message stating CHANGES NEED TO BE SUBMITTED TO BE FINALIZED. This is a reminder to click SUBMIT after you make your edits. Now you can make your edits, then choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SUBMIT; remember – you must choose submit to ensure your changes are included in the version your manager is reviewing.

TO REVIEW A PREVIOUSLY SUBMITTED CHECK-IN

To view a check-in you have previously submitted (including from a previous quarter), click the SHOW COMPLETED AND EXPIRED TASKS button.



<input checked="" type="checkbox"/> Show completed and expired tasks		
Title ▾	Description	Status ▾
 2018 January Quarterly Check-in 	Quarterly Check-in: Jan FY18	 Completed

QUESTIONS, CONCERNS & COMMENTS

Please direct questions, concerns and comments to your Human Resources Business Partner (HRBP) or email achieveonline@uci.edu.