ACHIEVEonline QUICK START GUIDE – MANAGER

ACCESS ACHIEVEonline
- Go to hr.uci.edu/partnership/achieveonline
- Click the GO TO ACHIEVEonline button
- Enter your UCInetID and password
- Click the LOGIN button

REVIEW/APPROVE GOALS
- From the Welcome Page, go to YOUR INBOX
- Click on Approve Goals
- You will see all of your employees' pending goals
- To approve or deny a goal, click box to left of employee name and click either approve or deny at the bottom
- To review a goal, click the APPROVE/DENY link at far right
- Review, edit, approve or deny
- If you click DENY, you can provide reason in COMMENTS field

MONITOR/EDIT TEAM (EMPLOYEE) GOALS
- From PERFORMANCE TAB, select MY GOALS
- Select TEAM GOALS tab, then select employee
- You can monitor or edit goal
- The dropdown button and right-pointing carrot (arrow) on the far right of the goal will show you the available action options
- Save or submit; submitting updates employee's goal
- It's recommended that you discuss any changes made to goal with employee

CREATE TEAM (EMPLOYEE) GOALS
- Click the CREATE button
- Enter pertinent information
- Click the YOUR TEAM button at the bottom
- Select employee(s) you are assigning goal to, including direct and indirect report(s)
- In the OPTIONS section choose either:
  - CREATE A SEPARATE GOAL FOR EACH USER
  - ALL USERS WILL SHARE THIS GOAL AND ITS PROGRESS (CASCADED GOAL)
- Save or submit; submitting updates employee's goal
- Cascaded (shared) goals are designated with an asterisk

COMPLETE QUARTERLY CHECK-INS
- From PERFORMANCE TAB, select QUARTERLY CHECK-IN
- Select check-in from Quarterly Check-In landing page (to access a previously completed check-in, click the SHOW COMPLETED AND EXPIRED TASKS checkbox)

- From the left navigation, select:
  - GOAL FEEDBACK-enter feedback on each goal; view comments, attachments and/or modify goal progress and/or comments
  - DISCUSSION QUESTIONS - enter feedback
  - MANAGER DISCUSSION QUESTION - enter feedback
  - MANAGER EMPLOYEE CHECK-IN DATE – enter date that in-person check-in discussion took place or will take place
- Save and exit, or continue; the SUBMIT button will appear if the check-in was previously submitted. Once you submit, employee will be able to see your input.

SUBMIT/RESUBMIT EMPLOYEE CHECK-IN(S)
- The SUBMIT button will appear only after all sections of the check-in have been completed; check-in may be submitted **before** or **after** in-person quarterly check-in discussion with employee
- From the OPTIONS button in the upper right of your screen, you can:
  - ADD CO-PLANNERS
  - Add ATTACHMENTS
  - PRINT REVIEW
  - PRINT REVIEWEE VERSION
- Press SUBMIT; once submitted employee can view your input
- You may make changes and resubmit the check-in up until the check-in close date

RECALL A SUBMITTED CHECK-IN AND EDIT
- From PERFORMANCE TAB, select QUARTERLY CHECK-IN
- From Quarterly Check-In landing page, click SHOW COMPLETED AND EXPIRED TASKS
- Click on the check-in you want to edit
- CHANGES NEED TO BE SUBMITTED TO BE FINALIZED
- Save or submit; submitting allows employee to view input

REPORTS AND DASHBORADS
- From the Welcome Page, click on REPORTS tab
- Select STANDARD REPORTS or DASHBOARDS

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

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