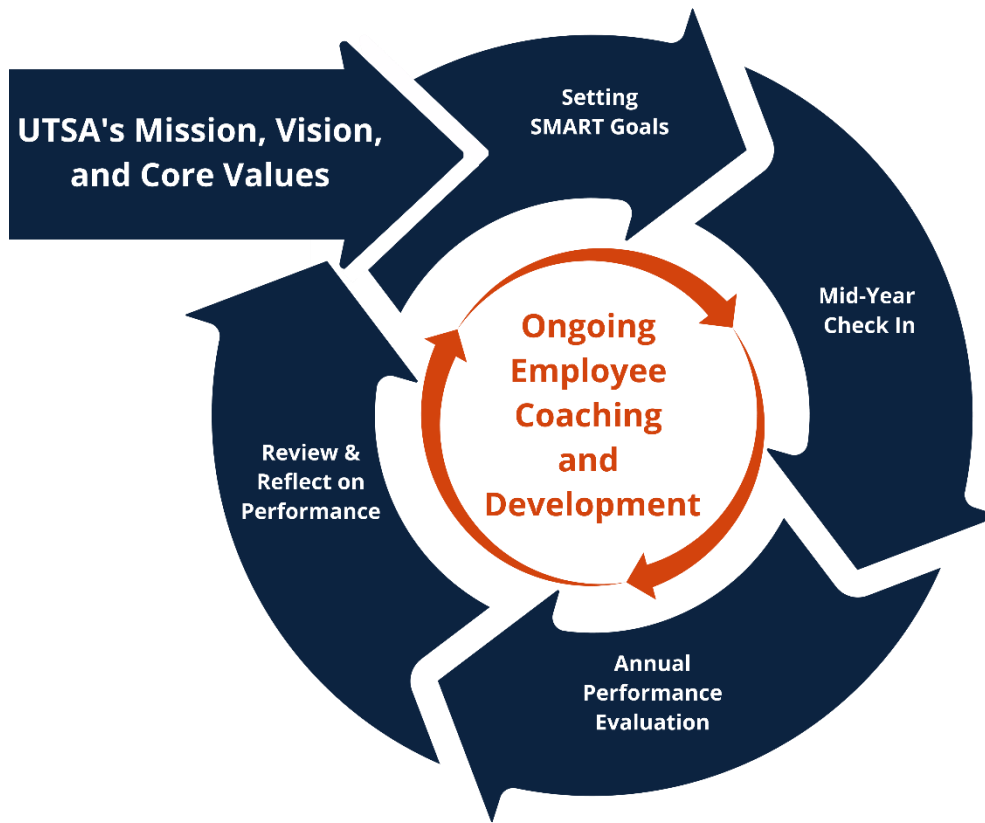


UTSA People Excellence

Manager Guide for Entering SMART Goals



The first step of the performance process is setting SMART goals for the performance year. A SMART goal is defined as one that is:

- S**pecific
- M**easurable
- A**chievable
- R**elevant
- T**ime-bound

Manager Tips

- Collaborate with your employees to create SMART goals that are strategic in nature, and align to the goals of the team and department
- Three to five SMART goals is the recommendation for the current performance year.
- Set aside time throughout the year to discuss the goals, including progress, adjustments and questions that may have surfaced
- Create a folder to save notes and evidence of goal progress and performance

This guide provides the step-by-step process for entering goals in an employee’s Performance Evaluation within PeopleSoft. Additional resources to guide employees through the process of creating SMART goals can be found on the [Performance Management Website](#).

Step 1 of 7 – Manager Self-Service

Select the **Manager Self-Service** on the PeopleSoft Homepage.



Step 2 of 7 – Team Performance Tile

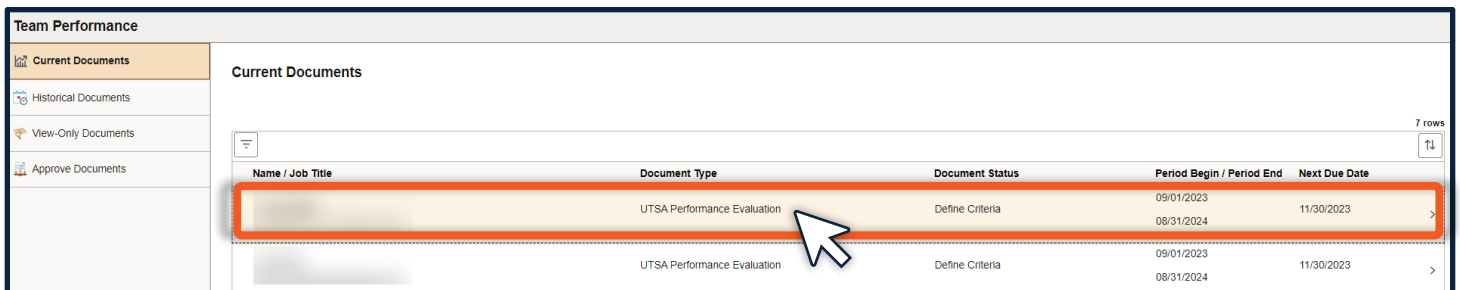
Select the **Team Performance** tile.



Step 3 of 7 – My Current Documents

The performance documents will appear under **My Current Documents**.

Select the **UTSA Performance Evaluation** for the current year.



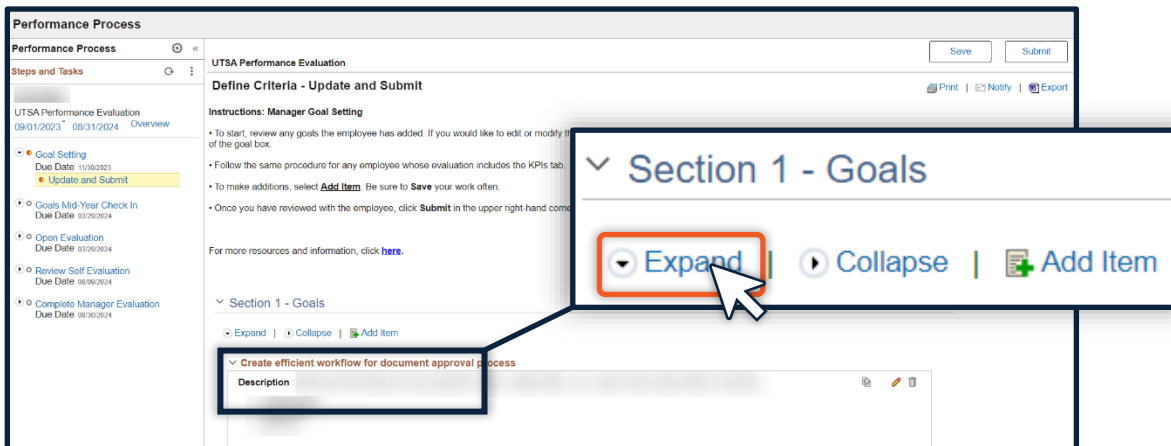
A screenshot of the 'Team Performance' page showing the 'Current Documents' section. A table lists performance documents. The first row is highlighted with a red box and has a mouse cursor pointing at it.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
	UTSA Performance Evaluation	Define Criteria	09/01/2023 08/31/2024	11/30/2023
	UTSA Performance Evaluation	Define Criteria	09/01/2023 08/31/2024	11/30/2023

Step 4 of 7 – Expand to View Goals

Select **Update and Submit** in the Goal Setting section of the task bar.

Click **Expand** to view the goals entered by the employee.



A screenshot of the 'Performance Process' page for a 'UTSA Performance Evaluation'. The page shows a task bar with 'Update and Submit' highlighted. A callout box highlights the 'Expand' button in the 'Section 1 - Goals' section. Below the callout, a description box is visible.

Performance Process

UTSA Performance Evaluation

Define Criteria - Update and Submit

Instructions: Manager Goal Setting

- To start, review any goals the employee has added. If you would like to edit or modify any of the goal box.
- Follow the same procedure for any employee whose evaluation includes the KPIs task.
- To make additions, select **Add Item**. Be sure to **Save** your work often.
- Once you have reviewed with the employee, click **Submit** in the upper right-hand corner.

For more resources and information, click [here](#).

Section 1 - Goals

Expand | **Collapse** | **Add Item**

Section 1 - Goals

- Create efficient workflow for document approval process**

Description:

Step 5 of 7 – Edit, Delete, or Add Goals (Optional)

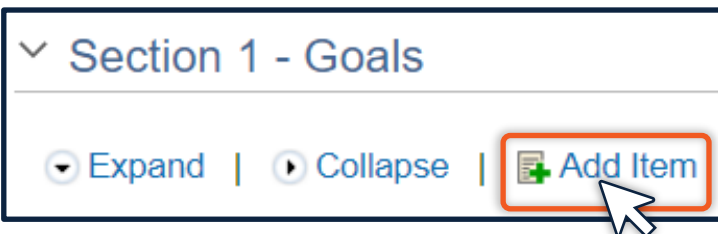
To edit a goal, select the pencil icon.

To delete a goal, select the trash can icon.

If you enter an additional goal, select **Save** in the upper right-hand corner to ensure that no work is lost.

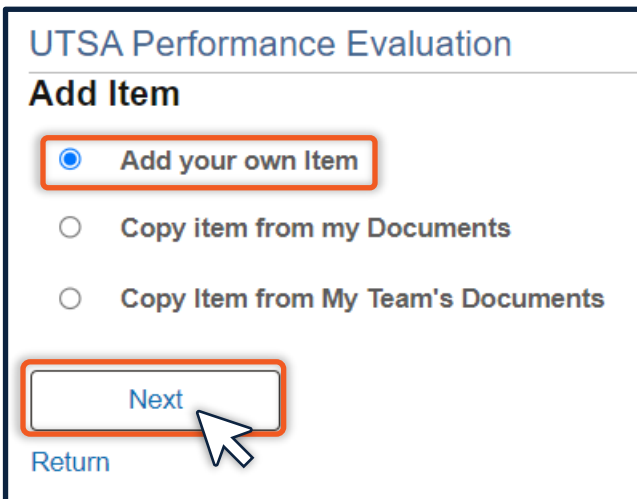


Select **Add Item** if additional goals are needed.



Select “Add your own item” to create a new goal.

Then, select **Next**.



Step 6 of 7 – Meet with Employee

Meet with your employee to discuss and finalize goals.



Step 7 of 7 – Submit and Confirm

After you and your employee have met and finalized goals, select **Submit** to complete this step of the process. A green check will appear next to “Goal Setting” in the task bar. Approvals are not a part of this step.

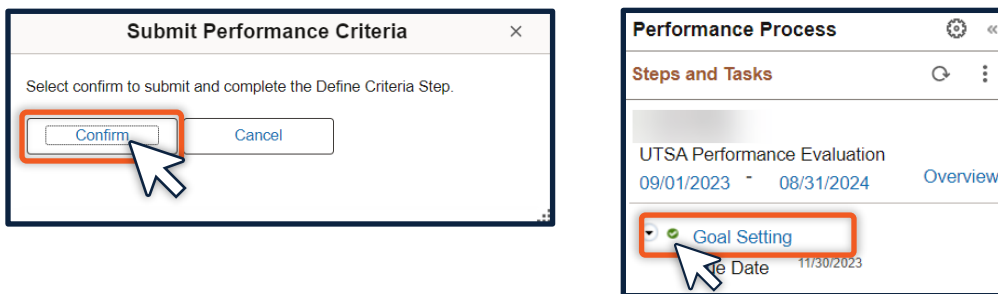


Print allows you to create a PDF of the evaluation.

Notify allows you to send a direct email to your employee.

Export allows you to create an editable Word document of the evaluation.

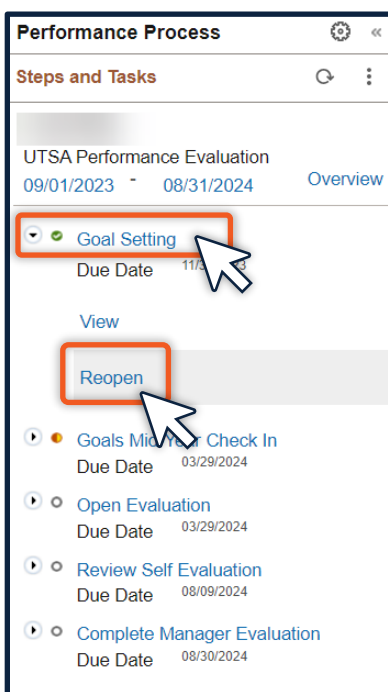
A pop-up window will appear. Select **Confirm** to complete the Goal Setting step.



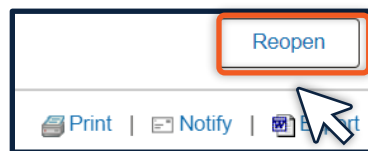
Feature: Reopen the Goal Setting Phase

Managers have the option to reopen the Goal Setting phase in order to edit, add or delete goals.

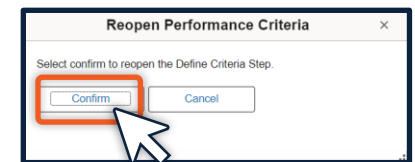
First, select **Goal Setting** on the left side task bar and then select **Reopen**.



Next, select the Reopen button on the top right of the evaluation



A pop-up window will appear. Select **Confirm** to reopen the document,



Note:

- Goals may need to be reopened if you accidentally click submit or if a goal needs to be edited or adjusted.
- Goals can also be adjusted at the mid-year check in. Once the evaluation is “open”, goals can no longer be adjusted, removed or added.