

# GOALS: ADVANCING AND EDITING FOR THE 2016-2017 PERFORMANCE PLAN

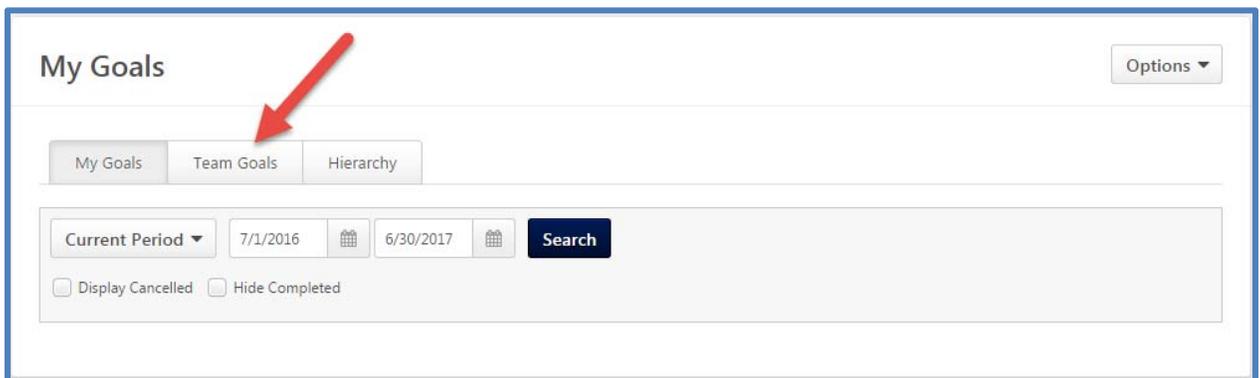
Below are the steps a manager will take to advance and edit (if needed) the goals of their employees to the next performance management cycle year. The DPS Values Goal should **NOT** be advanced.

Before beginning to advance and edit any goals you should have received communication and approved edits from your NCVIP Core Team Representative. **Only approved** edits to goals should be made.

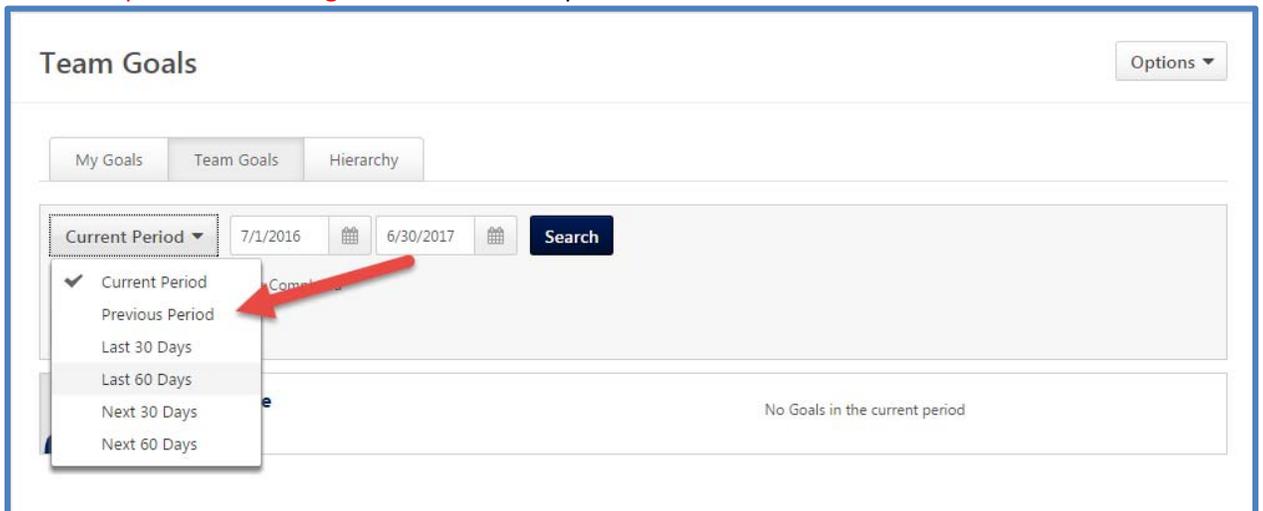
1. Manager/Supervisor: In NC Learning Center: Under the Performance Tab, Click **"GOALS"**.



2. Click the **"TEAM GOALS"** tab. There are no goals here because goals have not been advanced to Current period (FY16-17).

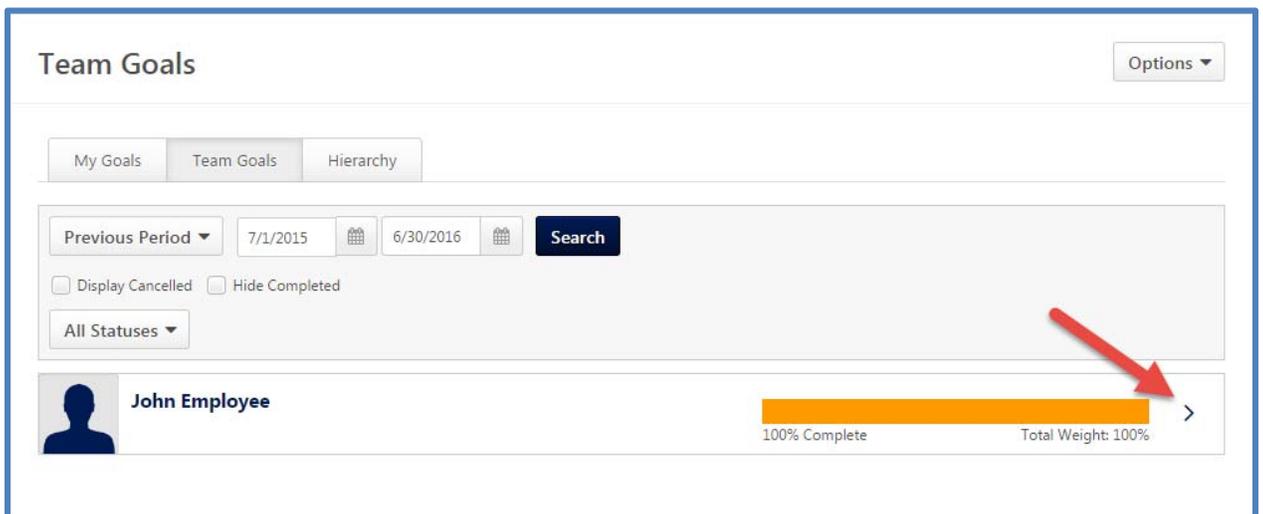


3. Click the **upside down triangle** to reveal the drop down list. Then select **“PREVIOUS PERIOD”**.



The screenshot shows the 'Team Goals' interface. At the top right is an 'Options' dropdown. Below it are tabs for 'My Goals', 'Team Goals', and 'Hierarchy'. A search bar contains 'Current Period', dates '7/1/2016' and '6/30/2017', and a 'Search' button. A dropdown menu is open under 'Current Period', listing: 'Current Period' (checked), 'Previous Period', 'Last 30 Days', 'Last 60 Days', 'Next 30 Days', and 'Next 60 Days'. A red arrow points to 'Previous Period'. Below the search bar, the text 'No Goals in the current period' is visible.

4. Click the **>** sign to the right of the employee's name to reveal each of the employee's goals.



The screenshot shows the 'Team Goals' interface with the 'Previous Period' selected in the search bar, with dates '7/1/2015' and '6/30/2016'. Below the search bar are checkboxes for 'Display Cancelled' and 'Hide Completed', and an 'All Statuses' dropdown. A card for 'John Employee' is shown with a profile picture, a 100% complete progress bar, and the text '100% Complete' and 'Total Weight: 100%'. A red arrow points to a right-pointing chevron (>) icon to the right of the progress bar.

5. Do **NOT** advance the DPS Values for Employees or DPS Values for Managers and Supervisors goals.

**Team Goals** Options ▾

Previous Period ▾ 7/1/2015 6/30/2016 Search

Display Cancelled  Hide Completed

All Statuses ▾

**John Employee** 100% Complete Total Weight: 100%

100% **DPS Values for Employees** Status: Completed Due Date: 4/14/2016 Perspective: State of NC Weight: 0%

100% **DPS4>HR->POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS** Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

6. Click the **upside down triangle**, then **“ADVANCE”** for the goal that you wish to advance to the next performance cycle.

**Team Goals** Options ▾

My Goals Team Goals Hierarchy

Previous Period ▾ 7/1/2015 6/30/2016 Search

Display Cancelled  Hide Completed

All Statuses ▾

**John Employee** 100% Complete Total Weight: 100%

100% **DPS Values for Employees** Status: Completed Due Date: 4/14/2016 Perspective: State of NC Weight: 0%

100% **DPS4>HR->POD STAFF DEV SPEC III - HRIS>DEADLINES AND METRICS** Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% **DPS4>HR->POD STAFF DEV SPEC III - HRIS>PROGRAM MANAGEMENT AND ADMINISTRATION** Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% **DPS4>HR->POD STAFF DEV SPEC III - HRIS>RESEARCH AND ANALYSIS** Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

100% **DPS5>HR->POD STAFF DEV SPEC III - HRIS>CUSTOMER SERVICE AND COMMUNICATION** Status: Completed Due Date: 6/1/2016 Perspective: State of NC Weight: 25%

Edit  
Cancel  
Advance  
View Historical Activity

- Review the **goal template** provided by your NCVIP Core Team Member to determine if edits are needed. **Only edits authorized by your NCVIP Core Team Member should be made.**

Select the appropriate section (1-7) to make the edit(s) which should correspond with the goal template provided to you by your assigned core team member.

Once goal edits are completed or if no edits are needed, scroll down to the Assignment section of this page.

**NOTE: Do NOT change the Start or Due Date fields.**

The screenshot shows a goal management interface with the following sections and callouts:

- Goal Title \* 1:** A breadcrumb trail "DPS4>HR>POD STAFF DEV SPEC III - HRIS" followed by "DEADLINES AND METRICS" which is highlighted in red. A blue arrow points to the right, and a blue box contains the text: "When editing a goal title, only edit the last section of the title."
- Goal Description 2:** A rich text editor with a toolbar and the text: "Meet assigned deadlines with focus on reduction of agency costs. Maintain metrics of assigned program area(s) as specified." A red circle 9 is at the end of the text.
- Start Date:** 7/1/2016
- Due Date \*:** 6/1/2017
- Weight \* 3:** 25
- Perspective \*:** State of NC
- Goal Category(s) 4:** 2 Selected
- Tasks:** A table with three rows. The total weight is 100%.

Description	Start Date	Due Date	Weight	Total Weight: 100%
Meet deadlines for requested projects and reports as defined by supervisor.	7/1/2016	4/14/2017	33 %	5
Run NCVIP and LMS reports monthly.	7/1/2016	4/14/2017	34 %	6
Complete required certification related to Leading at All Levels Supervisory Foundations. Attend all modules as a... <a href="#">read more</a>	7/1/2016	4/14/2017	33 %	
- Add Tasks 7:** A button to add new tasks.
- Attachments:** A "Choose File" button and a note: "Upload up to 3 attachments. Maximum upload 1mb"

8. Select **“YOUR TEAM”**.

**Attachments**  
Choose File  
Upload up to 3 attachments. Maximum upload 1mb

**Assignment \***  
Select which users or Org Units to which this goal should be assigned.

Yourself  Your team

Cancel Save as Draft Submit

9. On this screen, you will have the option to assign the goal to every team member by checking the **top checkbox** (1) or assign the goal to just one or select employee(s) by marking the check box beside the employee’s name (2). Once you have made the selection, click the **“SUBMIT”** button.

**Assignment \***  
Select which users or Org Units to which this goal should be assigned.

Yourself  Your team

<input type="checkbox"/> (1)	Name	Title	Direct and Indirect Reports <input type="checkbox"/>
<input type="checkbox"/>	Jane Manager		
<input type="checkbox"/> (2)	John Employee		

**Options**  
 Create a separate goal for each user.

Cancel Save as Draft Submit

**NOTE:** If you click the check box next to **“Name”**, be sure to deselect your name if you are not intended to receive the goal. Double check to ensure that **“Direct and Indirect Reports”** is **NOT** checked.

10. Once you click the “Submit” button above, it will bring you back to the goals screen for the current year. Return to **Step 3** to begin advancing the next goal.

### **FINAL NOTES:**

1. Goals should total 100% for the next cycle year.
2. Do **NOT** advance the “NC DPS Values for Employees” or “NC DPS Values for Supervisors” goal. These goals will be assigned by the central HR office.
3. An existing goal may be advanced more than once. If you have been instructed by your NCVIP Core Team Member to add a new goal, then you will advance and edit an existing goal to reflect all new information as instructed above.
4. If you have any questions, contact your NCVIP Core Team Member before proceeding with Advancing/Editing your assigned goals.