

Performance Review System (PRS) Goals Instructions

Overview - These instructions will cover the Goals section in the Performance Review System to provide directions on how to:

- Add Departmental Goals (p. 2) - A supervisor can add departmental goals for their direct reports;
- View Departmental Goals (p. 2) – An employee can view departmental goals set by their supervisor.
- Add and Submit Personal Goals (p. 3) - An employee or supervisor can add their personal goals and related PDF attachments or comments and submit them to their supervisor.
- Return Personal Goals to the Employee for Edits (p. 4) – A supervisor can release submitted goals back to the employee for edits.
- Add Attachments to Personal Goals (p. 4) – An employee or supervisor can add attachments to an employee’s personal goals.
- Add Comments to Personal Goals (p. 4) – An employee or supervisor can add comments to an employee’s personal goals.

Log into the system at <https://hr-performance-review.oitapps.ua.edu/> using your myBama credentials.

Employee Dashboard - Listed below are the three sections of the Annual Review and the actions that can be taken.

Goals – Create or modify personal goals, if directed to, and submit to their supervisor. View submitted Personal goals. Add comments or attachments to personal goals. View departmental goals added by their supervisor.

Self-Assessment – Create a self-assessment, if directed to by their supervisor.

Annual Review – Access the annual review once the supervisor has released it to the employee.

Supervisor Dashboard – Listed below are the three sections of the supervisor’s dashboard and the actions that can be taken.

Your Annual Review – Access the three sections of the Annual Review as an employee as stated above. Add, modify, or delete departmental goals for their direct reports.

Your Employees – View an employee’s submitted goals. Release submitted goals back to the employee for edits. Add comments or attachments to the employee’s goals. Select the outcome of the employee’s goals. Initiate an employee’s annual review. View an employee’s self-assessment. View an employee’s previous reviews completed in the system. Send a review to the Next-Level supervisor for approval. Release an approved review to the employee for their review.

Next-Level Supervisor – Review and approve pending reviews as the next-level supervisor. Return a review back to the supervisor for edits.

* In both dashboards, there are two icons along the top menu which allow the user to return to the Dashboard and a dropdown with options to log out and to view any of the employee’s previous reviews completed in this system.

Performance Review System (PRS) Goals Instructions

Adding Departmental Goals (Supervisor only)

The supervisor can add department goals for the current review year which will populate in the Goals section for each of their direct reports.

- Select **Your Annual Review**.
- Select **Create/Modify Personal and Departmental Goals**.
- Select **Add Departmental Goals**.
- Select the correct review period from the highlighted drop-down on the right.
- Select **Add New Team Goal**.
- Add the department goal in the text box.
- Select **Create Goal** button.

2023 - 2024

Personal Goals Departmental Goals 1 + Add Departmental Goals for Your Employees

Add Departmental Goals for Your Employees

These are goals you set for your department. Your employees will be asked to base their personal goals off of the departmental goals.

+
Add New Team Goal

Viewing Departmental Goals

Once added by the supervisor, the departmental goals will populate in the Departmental Goals section for the supervisor's direct reports. Departmental goals can be edited or deleted by the supervisor, as needed.

2023 - 2024

Personal Goals Departmental Goals 1 + Add Departmental Goals for Your Employees

Departmental Goals

Departmental goals are determined by your supervisor and should be used as a basis in setting your personal goals

Department Goal 1

Test departmental goal #1.

Performance Review System (PRS) Goals Instructions

Adding and Submitting Personal Goals

Supervisors should notify their employees if they are to add personal goals for the current or upcoming review year.

- Select **Create/Modify Personal and Departmental Goals**.
Note: Departmental goals are added by the supervisor.
- Select the correct review period from the highlighted drop-down on the right.
- Select **Add New Personal Goal**.
- Add a title for the goal, a brief description of the goal to include the measure that defines your success in meeting the goal and a due date.
- Attach a PDF, if desired.
- Select **Create**.

The screenshot displays the PRS interface for adding personal goals. At the top right, a yellow dropdown menu shows the review period '2023 - 2024'. Below this, there are two tabs: 'Personal Goals' (active) and 'Departmental Goals 0'. The main heading is 'Personal Goals', followed by a paragraph explaining that these goals should be developed with a supervisor. A blue button labeled 'Submit Goals To Supervisor' is visible. Below this, a dashed box contains a trophy icon and the text 'No Goals For This Review Year' with the instruction 'Get started by creating a new goal below'. At the bottom, there is a form with a 'Title' field, a 'Write a goal...' text area, and buttons for 'Attach a file', 'Set Due Date', and 'Create'.

Note: A supervisor cannot see any goals that an employee has added until they submit them to the supervisor. Once submitted to the supervisor the employee cannot add or edit the goals but can add comments or attachments.


- Select **Submit Goals to Supervisor**.
- Select **Submit Goals to Supervisor** to confirm the submission.
- To cancel the submissions, select **Dashboard** or the browser back button.

The employee and their supervisor will both receive email notification that the personal goals have been submitted.

Performance Review System (PRS) Goals Instructions

Returning Submitted Goals to the Employee (Supervisor only)

- Select **View Goals** from **Actions dropdown** for the employee in the **Your Employee** section.
- Select the correct review period from the highlighted drop-down on the right.
- Select **Release Goals Back to Employee**.
- Select **Release Goals Back to Employee** again to confirm.

 The employee has submitted their goals and cannot add any additional goals for this annual review period

Release Goals Back to Employee

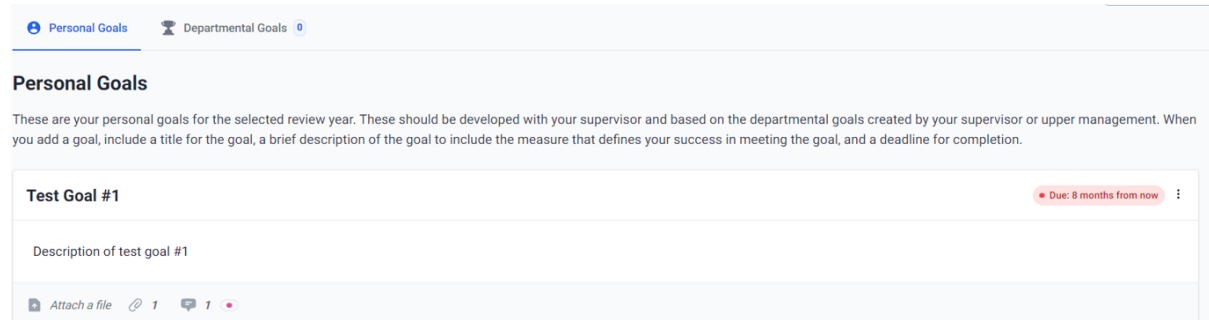
2023 - 2024 ▼

The employee will receive email notification that their goals have been returned to them for edits.

Adding Attachments to Personal Goals (only PDF documents)

- Select **Attach a file**.
- Locate the .pdf file and open it.

Both the employee and supervisor can add attachments to an employee's goals. Attachments can only be deleted by the person who attached it.

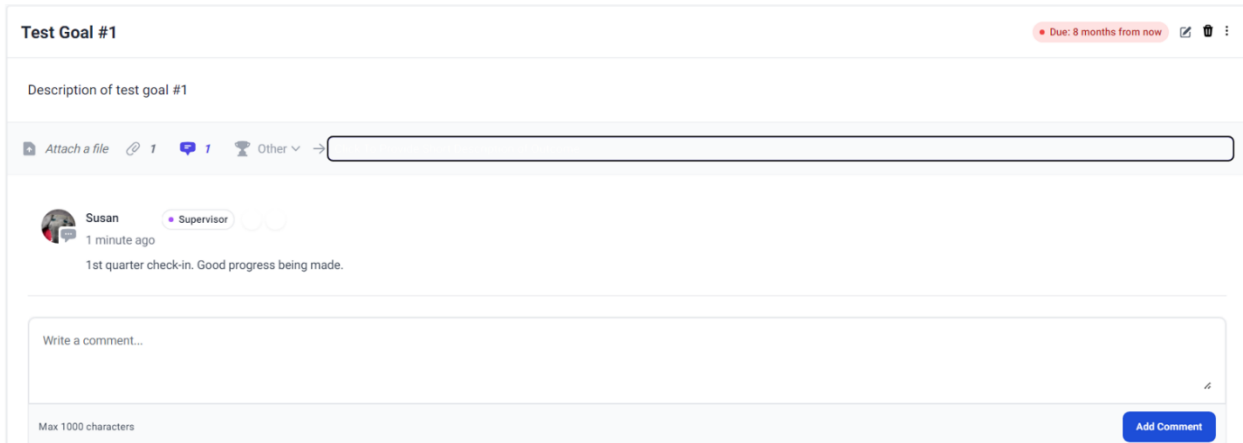


The screenshot shows the PRS interface. At the top, there are two tabs: 'Personal Goals' (active) and 'Departmental Goals'. Below the tabs, the heading 'Personal Goals' is followed by a paragraph: 'These are your personal goals for the selected review year. These should be developed with your supervisor and based on the departmental goals created by your supervisor or upper management. When you add a goal, include a title for the goal, a brief description of the goal to include the measure that defines your success in meeting the goal, and a deadline for completion.' Below this, a goal card is displayed with the title 'Test Goal #1' and a red dot indicating 'Due: 8 months from now'. The description field contains 'Description of test goal #1'. At the bottom of the goal card, there is an 'Attach a file' button, a link icon with the number '1', a comment icon with the number '1', and a red dot.

Performance Review System (PRS) Goals Instructions

Adding Comments to Personal Goals

- Select the **Comment icon**.
- Add the comment.
- Select **Add Comment**.



The screenshot displays a user interface for a goal titled "Test Goal #1". At the top right, there is a red notification bubble that says "Due: 8 months from now" along with edit, delete, and menu icons. Below the title is a text area for the goal description, currently containing "Description of test goal #1". Underneath is a toolbar with options for "Attach a file", "Share" (with a count of 1), "Like" (with a count of 1), and "Other" with a dropdown arrow. A comment from a user named "Susan" (marked as "Supervisor") is shown, dated "1 minute ago", with the text "1st quarter check-in. Good progress being made." Below the comment is a text input field with the placeholder "Write a comment..." and a blue "Add Comment" button. At the bottom left of the input field, it says "Max 1000 characters".

Both the employee and supervisor can add comments to an employee's goals. Comments can only be edited or deleted by the person who added it.

Visit the [Performance management website](#) for other resources related to the annual review process.