This job guide focuses on **creating goals and job duties for employees**.

Access Performance Management by using your Texas State Net ID and password to logon to this site:  
[www.hr.txstate.edu/performance-management/login.html](http://www.hr.txstate.edu/performance-management/login.html)

*For this job aid, the manager has two employees on the team.*

### ADDING GOALS

1. To create a goal for a team member, click on the team member desired in the “My Team” tile.
The employee tile will appear with various options.

2. Click on “Actions” or the gear icon. Click on “Goal Plan” to be directed to the employee’s goal plan.

3. Click on the “Add New” button to create a new goal.

Note that you can see the plan for the prior cycle as well as the current cycle June 2017-May 2018.
4. Click on the “Library Goal” button to access the Texas State Goal Library.

The University has a new strategic plan and the library contains the four (4) University goals and the related initiatives. In addition, it also contains the selection to add job duties.

5. Click on a University goal to display the related initiatives available for selection. Check the box beside the item to select (see highlighted box below).
6. Click the “Add Selected Goal” button.

7. After clicking “Add Selected Goal” the window below will automatically pop up and default to the category and University Goal selected above.

As an option, tasks can be added to reinforce specific associated tasks.

Select a status. Is this not started, started an on track, off target, etc.
8. In the “Individual Description for Goal or Job Duty” box, enter a specific SMART goal.

A SMART goal is Specific, Measurable, Achievable, Realistic and Time-bound. Go to the Performance Management website to learn more about SMART goals [www.hr.txstate.edu/performance-management.html](http://www.hr.txstate.edu/performance-management.html)

9. Add tasks if needed. Tasks can be added by clicking on 📋 beside “Add Tasks, If Needed.” Enter a target (due) date and a task description.

As an option, tasks can be added to reinforce specific associated tasks.

You can enter multiple tasks for the goal by continuing to click the 📋 icon located in the Action area.

10. Enter how success will be measured for the goal.

11. Select a status for the goal.
12. Update the start and end dates, if necessary. The dates will default to the cycle dates with a start date of June 2017 and an end date of May 2018.

![Update form]

13. Click the “Save Change” button at the bottom of the screen to save changes.

![Save Changes button]

This is a screen capture of the employee’s goal plan after the manager created the goal. Note the alert highlighted in yellow indicates the goal was created for the employee by the manager.

![Goal Plan]

**JOB DUTIES**

1. To add job duties for a team member, click on the team member desired in the “My Team” tile.
The employee tile will appear with various options.

2. Click on “Actions” or the gear icon. Click on “Goal Plan” to be directed to the employee’s goal plan.

3. Click on the “Add New” button to create a job duty (please note that the “Create a New Goal” button is also used to add job duties).

4. Click on the “Library Goal” button to access the Texas State Goal Library.
The University has a new strategic plan and the library contains the four (4) University goals and the related initiatives. In addition, it also contains the selection to add job duties.

5. Click “Add Job Duty” and select “Enter job duty or responsibility”.

6. Enter the Job Duty in the box labeled “University Goal or Job Duty”.

7. Add tasks to Job Duties, if needed. Tasks can be added by clicking on beside “Add Tasks, If Needed.” Enter a target (due) date and a task description.
Below is a detailed example in which tasks are used to identify specific action/duties/responsibilities for which the employee is responsible. Since these are ongoing job duties for the cycle, a task date is not necessary.

8. Next, enter the Job Duty Individual Job Description. This allows managers to add a great deal of detail to the job duties.

For managers who wish to see a list of general job duties visit the HR website at [www.hr.txstate.edu/performance-management/resources.html](http://www.hr.txstate.edu/performance-management/resources.html)

You can copy and paste from the HR job duty list into this software.

HR continues to recommend to have no more than eight (8) job duties for an employee.
9. Select “Ongoing Job Duty”. Since these are ongoing job duties for the cycle, a task date is not necessary. Click “Save Changes.

10. Repeat the above steps to add additional job duties.
This ends the job guide on creating goals and adding job duties. For more training guides go to the Performance Management website at: www.hr.txstate.edu/performance-management.html

For additional assistance please contact performancemgmt@txstate.edu or 512.245.2557. This information is available in alternate format upon request from the Office of Disability Services.