

Manager Creates Goals and Job Duties

This guide focuses on creating goals and job duties for employees. If you created goals last year for your team, view the [manager copies goals from prior year goal plan guide](#).



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

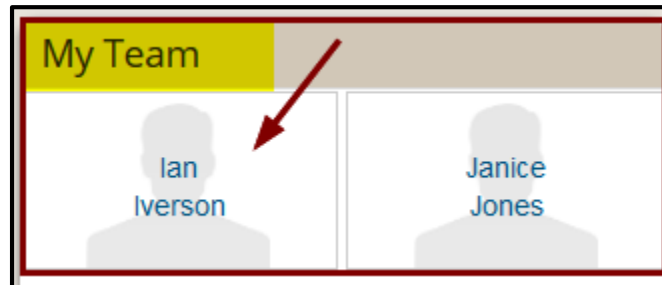
For this example, the manager has two employees on the team

The screenshot shows a web-based dashboard for a manager at Texas State. The interface is organized into several sections:

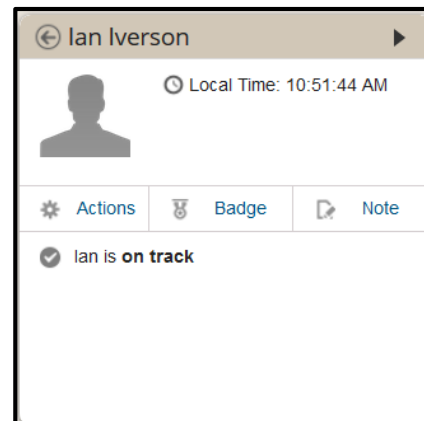
- Header:** Includes a home icon, "Home" with a dropdown arrow, the "TEXAS STATE" logo, and "Home" and "Help & Tutorials" navigation links.
- To Do:** A task management section with a "Sort by Date | Type" filter and a settings gear. It shows one task due later: "Add Work Environment & Physical Demands for Plan" on JUL 28, with a progress indicator of "0 of 2 Completed". Below it, a "Recently Completed (0)" section is empty.
- Welcome Bobcats:** A message box with a settings gear. The text reads: "This is the go to place to plan and manage goal and performance management at Texas State. We are excited to go green with this project eliminating the 'old paper' process and offering an on-line alternative to all of our staff employees."
- My Goals:** A section titled "June 2017-May 2018 Goals and Job Duties" with a list of goals, including "4.1 Offer competitive salaries to attract and retain highly qualified faculty and staff."
- My Info:** A profile section for "David Drew, VP Engineering" with a settings gear and a placeholder for a profile picture.
- My Team:** A section showing two team members: "Ian Iverson" and "Janice Jones", each with a placeholder for a profile picture.

Step 1 - Adding Goals

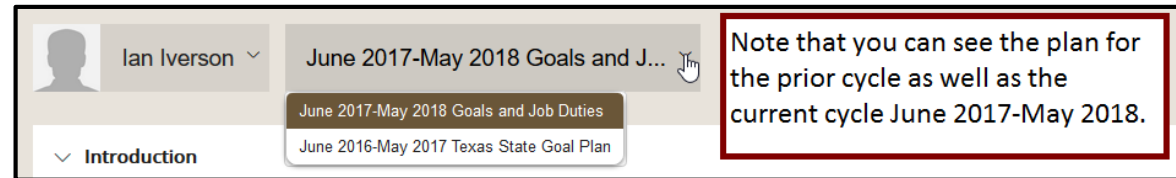
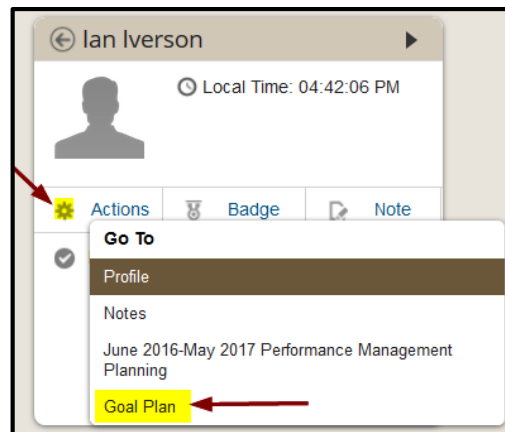
- To create a goal for a team member, click on the team member desired in the “My Team” tile.



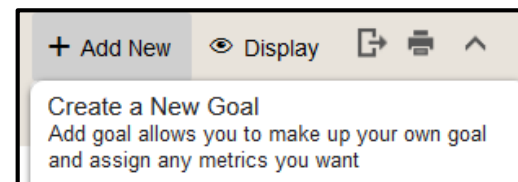
The employee tile will appear with various options.



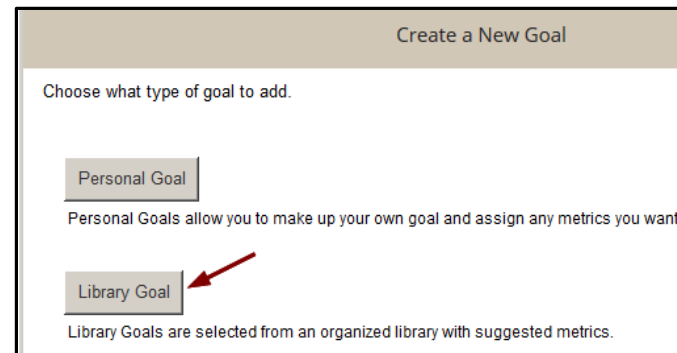
- Click on “Actions” or the gear icon ⚙️. Click on “Goal Plan” to be directed to the employee’s goal plan.



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



- Click on the “Library Goal” button to access the Texas State Goal Library.



Create a New Goal

Choose what type of goal to add.

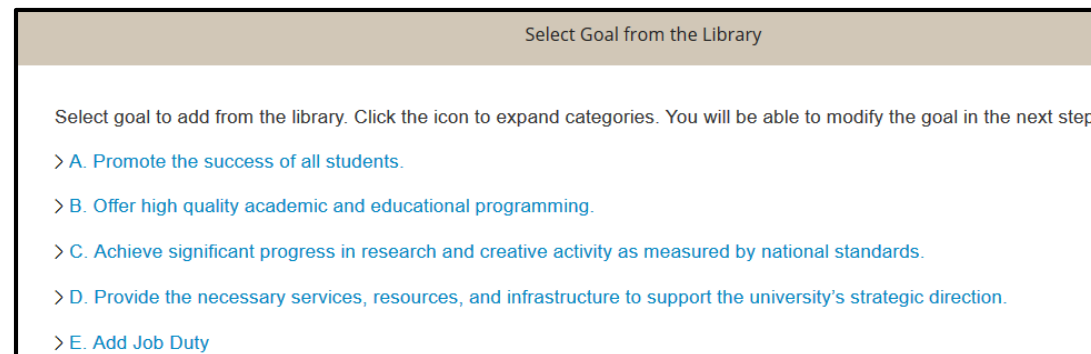
Personal Goal

Personal Goals allow you to make up your own goal and assign any metrics you want.

Library Goal

Library Goals are selected from an organized library with suggested metrics.

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.

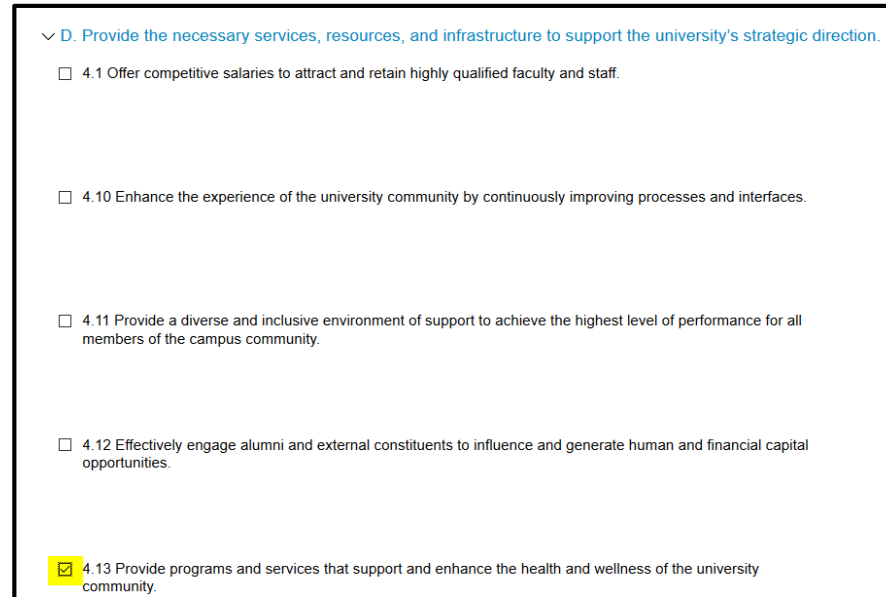


Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

- > A. Promote the success of all students.
- > B. Offer high quality academic and educational programming.
- > C. Achieve significant progress in research and creative activity as measured by national standards.
- > D. Provide the necessary services, resources, and infrastructure to support the university's strategic direction.
- > E. Add Job Duty

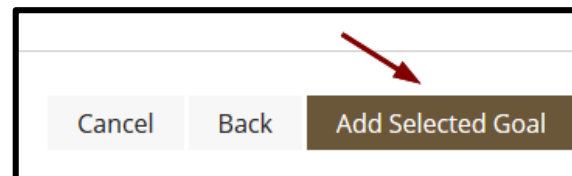
- Click on a University goal to display the related initiatives available for selection. Check the box beside the item to select (see highlighted box below).



▼ D. Provide the necessary services, resources, and infrastructure to support the university's strategic direction.

- 4.1 Offer competitive salaries to attract and retain highly qualified faculty and staff.
- 4.10 Enhance the experience of the university community by continuously improving processes and interfaces.
- 4.11 Provide a diverse and inclusive environment of support to achieve the highest level of performance for all members of the campus community.
- 4.12 Effectively engage alumni and external constituents to influence and generate human and financial capital opportunities.
- 4.13 Provide programs and services that support and enhance the health and wellness of the university community.

- Click the “Add Selected Goal” button.



Cancel Back **Add Selected Goal**

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

Add Goal

Edit your goal below.

Fields marked with * are required.

Category :

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* University Goal Or Job Duty:

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* Individual Description for Goal or Job Duty:

Add Tasks: [+ Add Add Tasks](#)

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

* How Will Success Be Measured?:

Goal or Job Duty Measurement: %

Status:

Add Goal Progress Update:

Start:

End:


- In the “Individual Description for Goal or Job Duty” box, enter a specific SMART goal.

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* Individual Description for Goal or Job Duty: Develop additional health and wellness programs for Texas State. Collaborate with the appropriate units to determine what other offerings can be made available to employees. Possibilities include a larger reduction in the student rec fee for employees, classes at the student rec for faculty & staff only, identify walking paths/trails across campus that includes distance. Possible employee incentives; example prove that you walked 20 miles in a week via a fitbit or other tracking device and receive a t-shirt, water bottle, amazon gift card, etc. Use your creative juices to inspire our faculty and staff to be active.





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


- 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.

Add Tasks:  Add Add Tasks

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

Add Tasks, If Needed:

Target Date	Task Description	Action
<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	   

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

- Enter how success will be measured for the goal.

* How Will Success Be Measured?:

Increased participation in our wellness program.

- Select a status for the goal.

Status: Not Yet Started

Add Goal Progress

Update: On Track

Off Target

Start: Ongoing Job Duty

Completed

End: Will Not Meet Due Date

No Longer Applicable

- 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:

Start: 06/01/2017

End: 05/31/2018

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

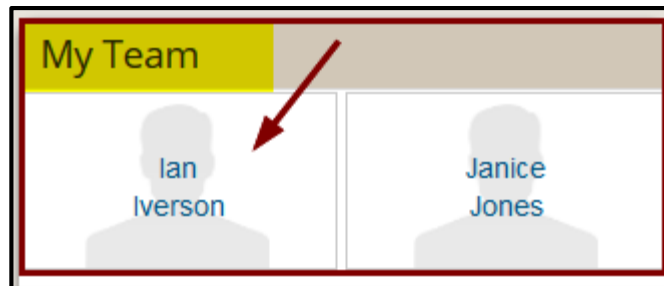


This is a screen capture of the employee’s goal plan after the manager created the goal. Note the alert highlighted in yellow indicates the goal was created for the employee by the manager.

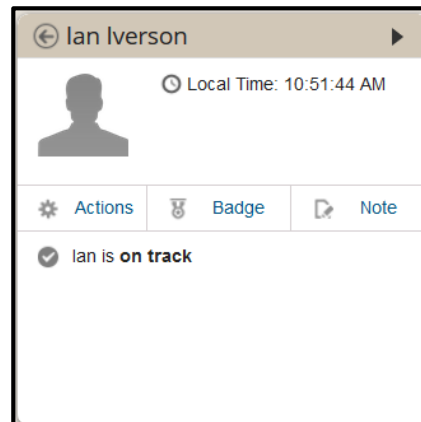
A screenshot of a web application interface for goal management. At the top, there is a header for 'Goal 4: Provide the necessary services, resources, and infrastructure to support the university's strategic direction.' Below this is a table with the following columns: '# University Goal Or Job Duty', 'Individual Description for Goal or Job Duty', 'Goal or Job Duty Measurement', 'Status', and 'Action'. The table contains one row with the following data: '# 4.1 4.13 Provide programs and services that support and enhance the health and wellness of the university community. Edit', 'Develop additional health and wellness programs for Texas State. Collaborate with the appropriate units to determine what other offerings can be made available to employees. Possibilities include a larger reduction in the student rec fee for employees, classes at the student rec. for faculty & staff only, identify walking paths/trails across campus that includes distance. Possible employee incentives; example prove that you walked 20 miles in a week via a fitbit or other tracking device and receive a t-shirt, water bottle, amazon gift card, etc. Use your creative juices to inspire our faculty and staff to be active.', 'Not Yet Started', and a three-dot menu icon. At the bottom left of the table area, there is a yellow alert box that reads 'Alert - Created by David Drew 6/26/17 5:04 PM'.

Step 2 - Add Job Duties

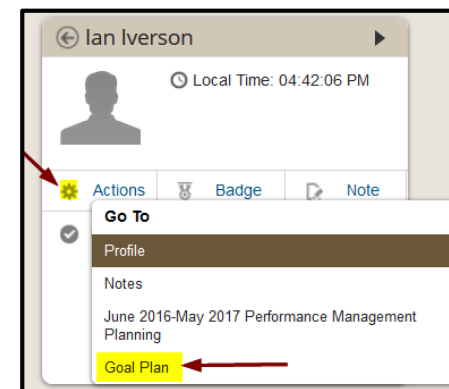
- To add job duties for a team member, click on the team member desired in the “My Team” tile.



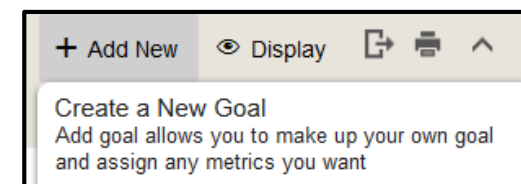
The employee tile will appear with various options.



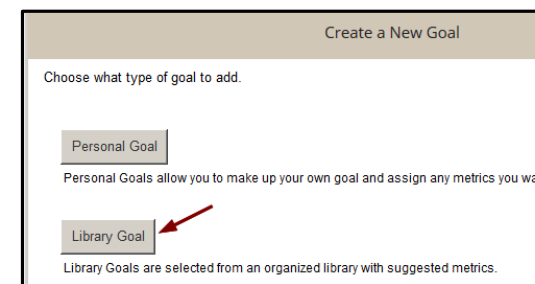
- Click on “Actions” or the gear icon ⚙️. Click on “Goal Plan” to be directed to the employee’s goal plan.



- 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*).




- Click on the “Library Goal” button to access the Texas State Goal Library.



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

Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

- > A. Promote the success of all students.
- > B. Offer high quality academic and educational programming.
- > C. Achieve significant progress in research and creative activity as measured by national standards.
- > D. Provide the necessary services, resources, and infrastructure to support the university's strategic direction.
- ✓ E. Add Job Duty 
 - Enter job duty or responsibility

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

Category : Job Duties


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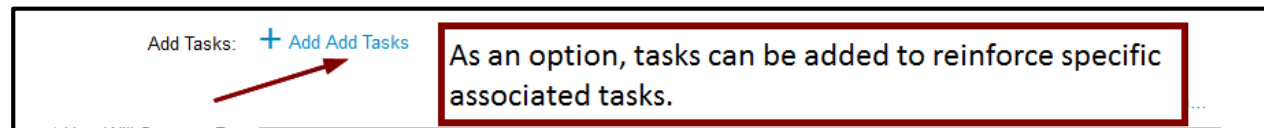
* University Goal Or Job Duty:
Duty: Provide monthly analysis reports to the Director.

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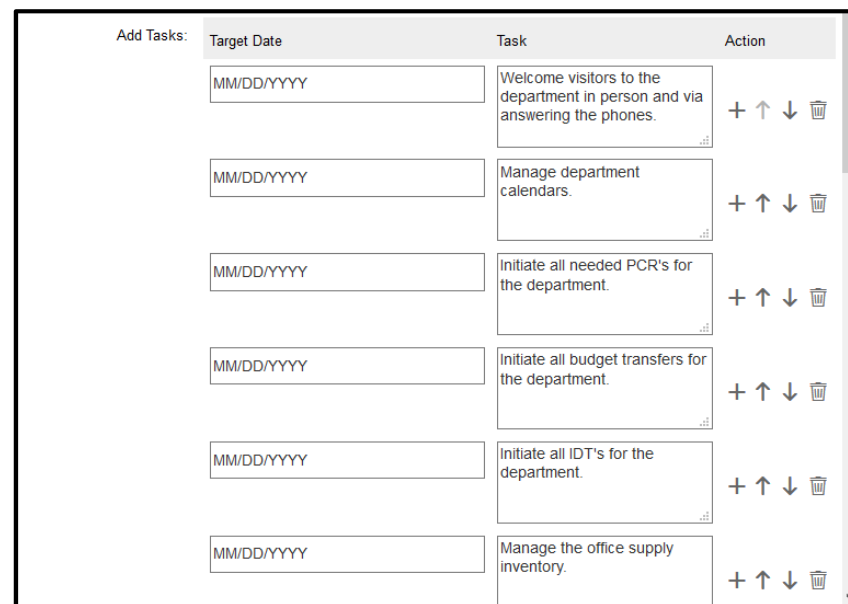
* Individual Description for Goal or Job Duty: By the 10th of every month, provide operational reports to the Director for review. These reports can include FTE, Turnover, Job Reclassifications, PCR's numbers for various types of PCR's, ULP Overtime, No Leave Reported Counts, etc.

Add Tasks: + Add Add Tasks

- 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.

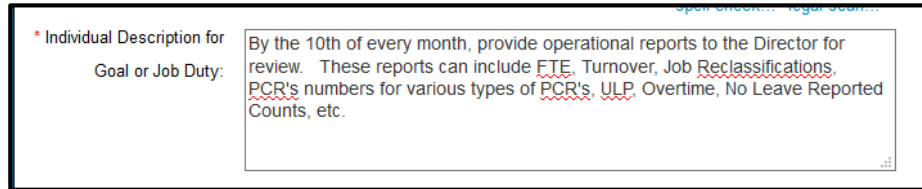


Below is a detailed example in which tasks are used to identify specific action/duties/responsibilities for which the employee is responsible. Since these are ongoing job duties for the cycle, a task date is not necessary.



Add Tasks:	Target Date	Task	Action
	<input type="text" value="MM/DD/YYYY"/>	Welcome visitors to the department in person and via answering the phones.	+ ↑ ↓ 🗑️
	<input type="text" value="MM/DD/YYYY"/>	Manage department calendars.	+ ↑ ↓ 🗑️
	<input type="text" value="MM/DD/YYYY"/>	Initiate all needed PCR's for the department.	+ ↑ ↓ 🗑️
	<input type="text" value="MM/DD/YYYY"/>	Initiate all budget transfers for the department.	+ ↑ ↓ 🗑️
	<input type="text" value="MM/DD/YYYY"/>	Initiate all IDT's for the department.	+ ↑ ↓ 🗑️
	<input type="text" value="MM/DD/YYYY"/>	Manage the office supply inventory.	+ ↑ ↓ 🗑️

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

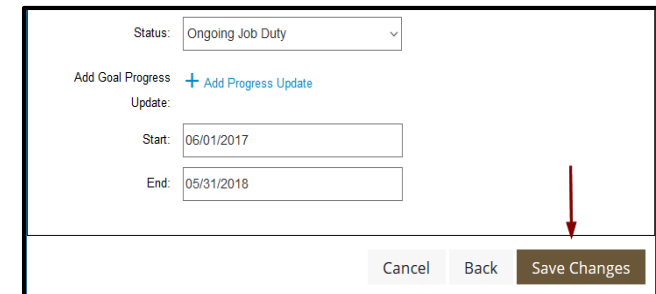


* Individual Description for
Goal or Job Duty: By the 10th of every month, provide operational reports to the Director for review. These reports can include FTE, Turnover, Job Reclassifications, PCR's numbers for various types of PCR's, ULP, Overtime, No Leave Reported Counts, etc.

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
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.

- Select “Ongoing Job Duty”. Since these are ongoing job duties for the cycle, a task date is not necessary. Click “Save Changes.



Status: Ongoing Job Duty
Add Goal Progress + Add Progress Update
Update:
Start: 06/01/2017
End: 05/31/2018
Cancel Back Save Changes

- Repeat the above steps to add additional job duties.

○ Job Duty Example #1

Add Goal

Edit your goal below.

Fields marked with * are required.

Category :

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* University Goal Or Job Duty:

[spell check...](#) [legal scan...](#)

* Individual Description for Goal or Job Duty:

Add Tasks: [+ Add Add Tasks](#)

[spell check...](#) [legal scan...](#)

* How Will Success Be Measured?:

Goal or Job Duty Measurement: %

Status:

Add Goal Progress Update: [+ Add Progress Update](#)

Update:

Start:

End:

Contacts

Email: performancemgmt@txstate.edu

Phone: 512.245.2557.

This information is available in alternate format upon request from the Office of Disability Services.

