My HR Connection Performance Training Guide

Individual Contributor – Goal Setting Conversation

Revision History

Version	Date	Description
Version 1.0	July 13, 2018	Initial Draft
Version 1.1	September 6, 2018	Updated Screen shots
Version 1.2	March 25, 2019	Logo update and Branding
Version 1.3	August 26, 2020	Updated with new process

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1. Introduction

1.1. Objectives

Upon completion of this manual, an Individual Contributor will be able to:

- Understand the Goal Setting Conversation Components.

- Successfully complete their required tasks in My HR Connection.

Employee Receives Notification to Kick Off Goal Setting Conversation Process → Employee Completes Goal Setting in My HR Connection → Manager Approves Goal Setting in My HR Connection

Figure 1: Goal Setting Conversation Business Process
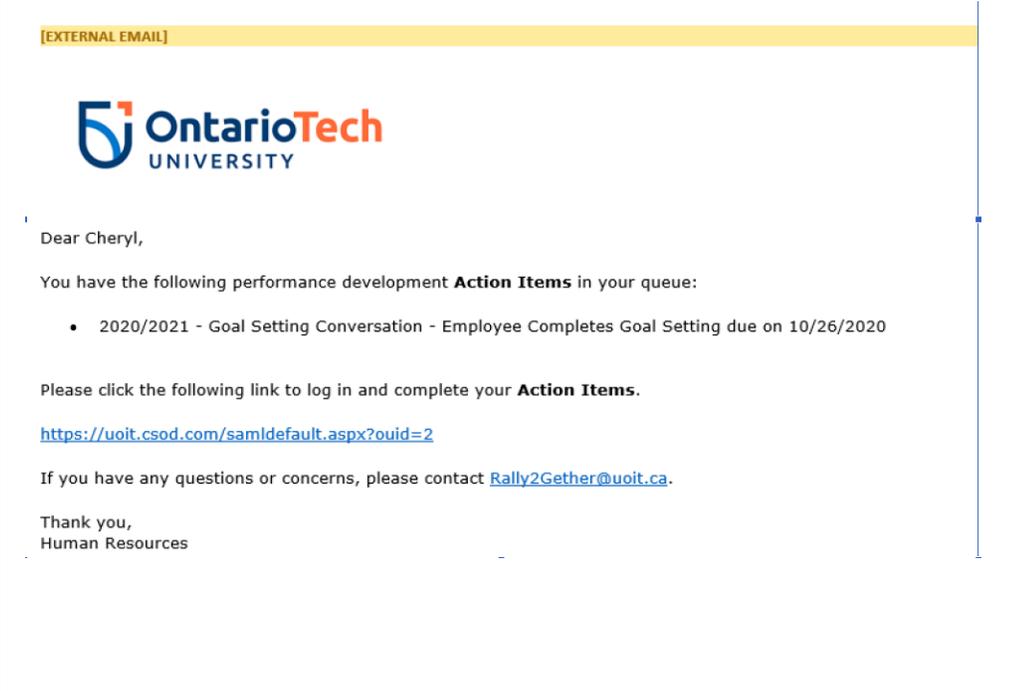
2. Goal Setting Conversation
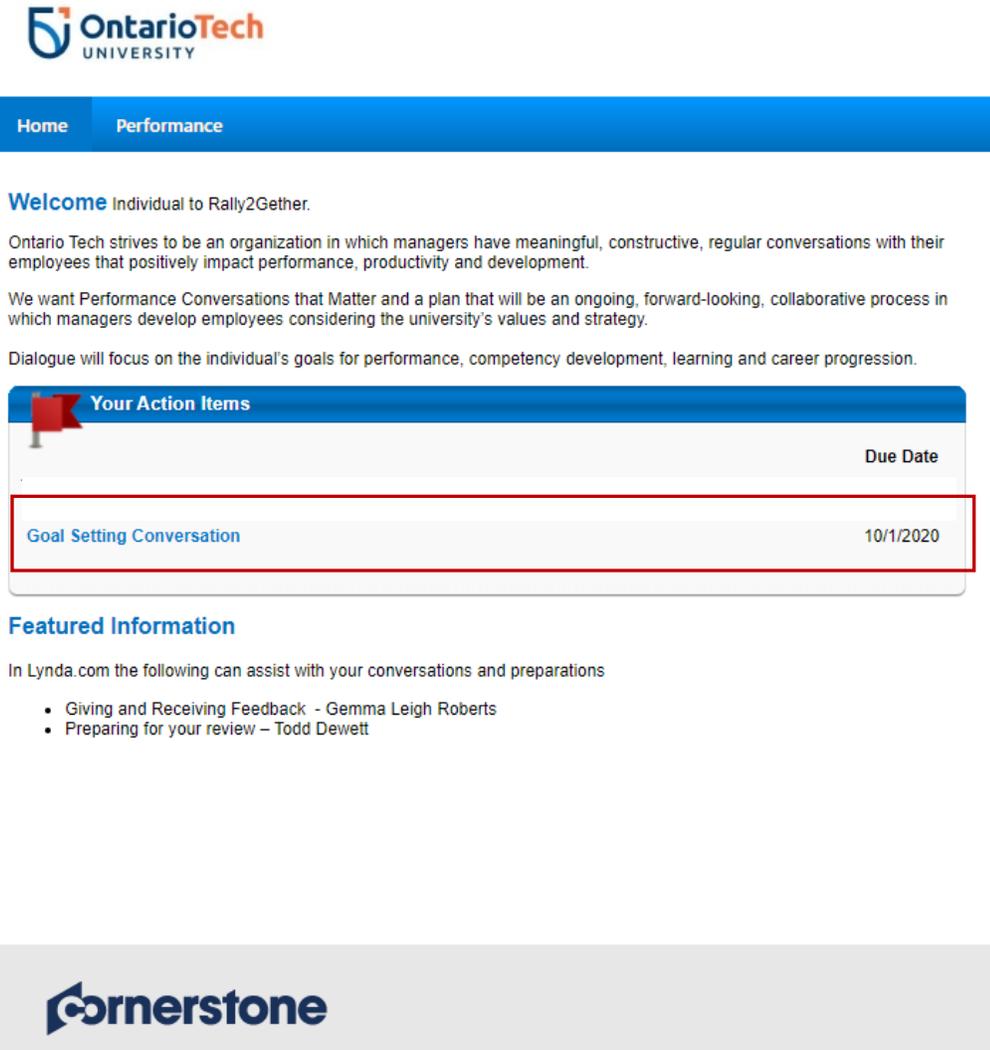
2.1. Goal Setting Conversation

The purpose of the Goal Setting Conversation is to provide employees and managers an opportunity to meet and discuss what the employees plan to accomplish in their role over the next year. Goal setting conversations are a collaborative process.
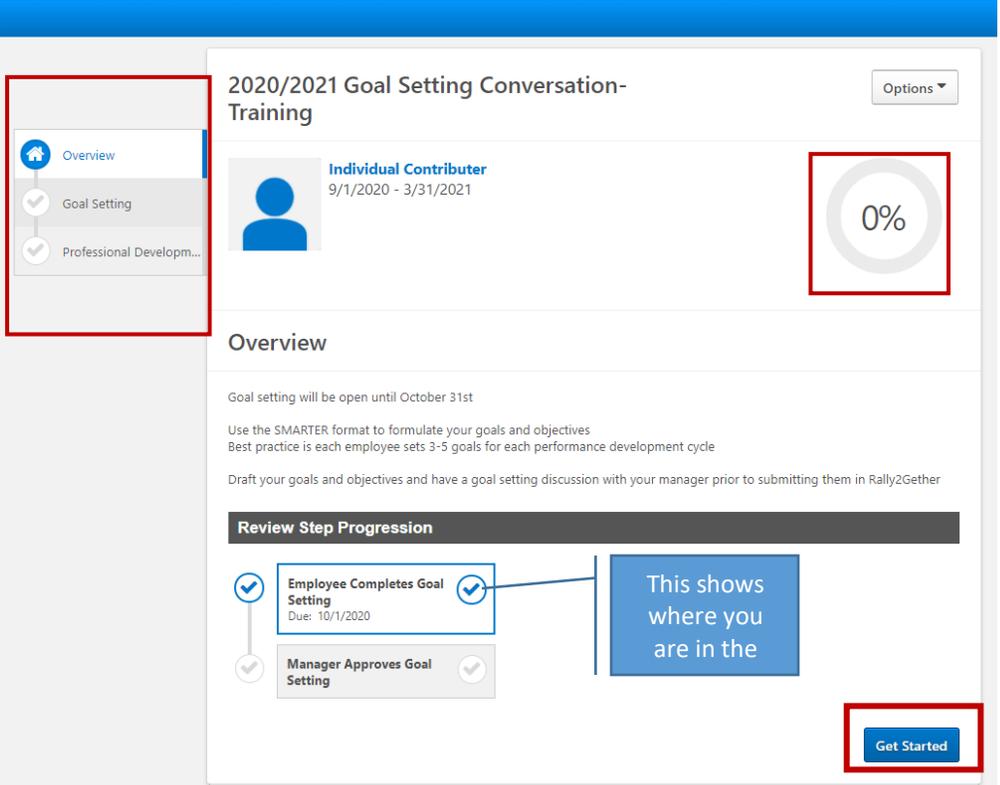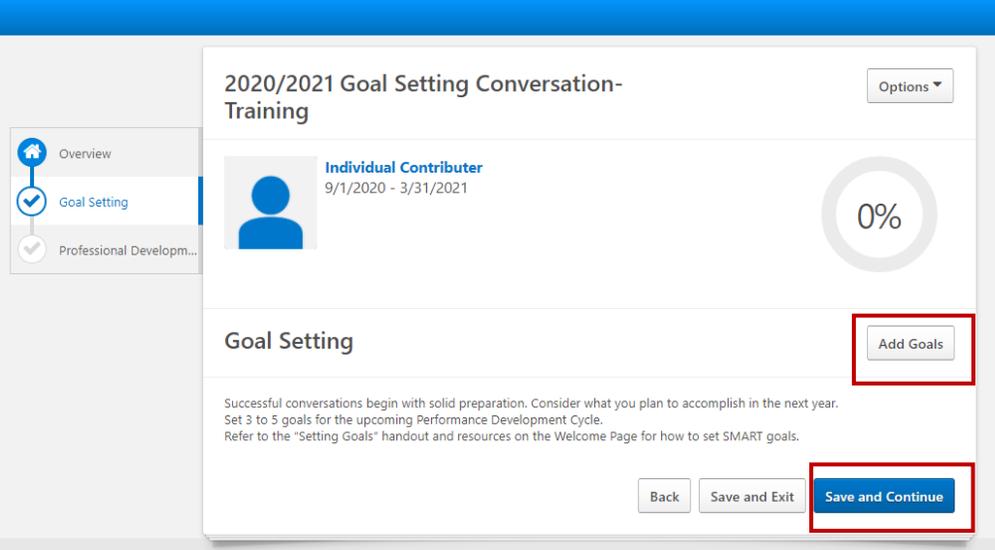
Points for discussion may include:

- Review the university's mission, vision, and values and priorities to consider how your goals could align.

- How can you in your role contribute to the success of your department, faculty, and the university?

- What do you love about your job? What are your strengths? How can you align your strengths with the goals you set this year?

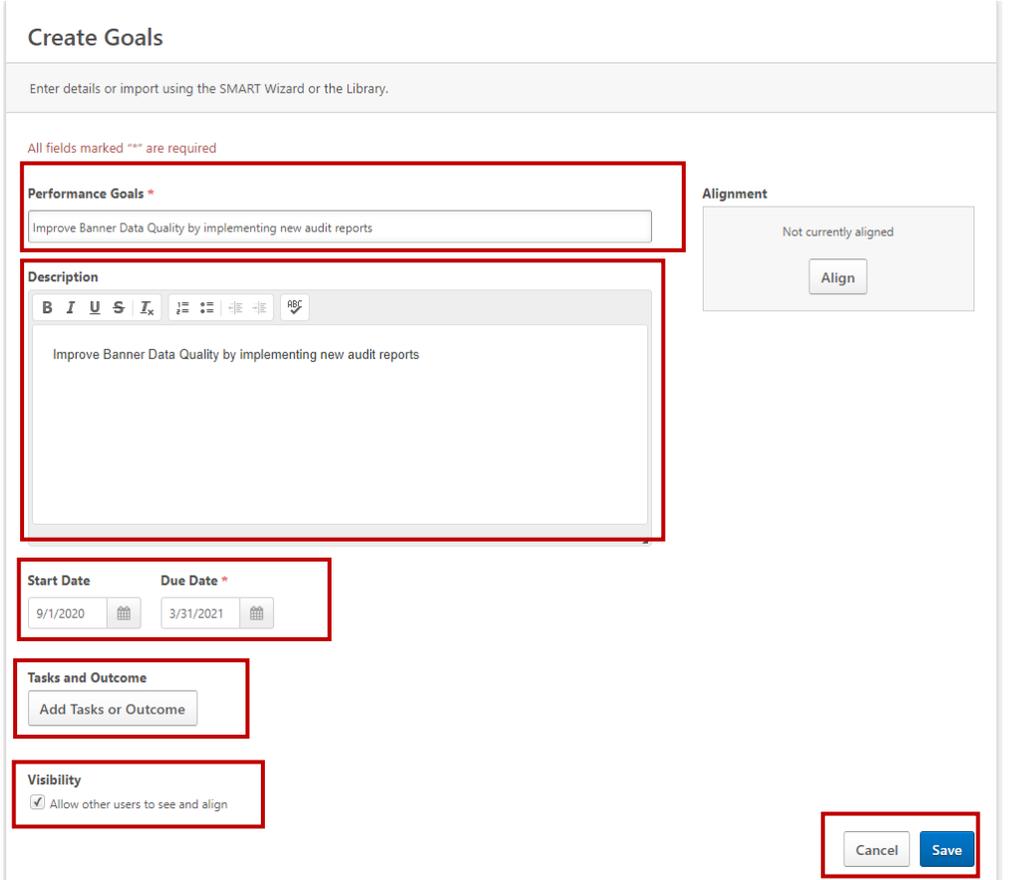- Which skills would you most like to develop? What goals could be set to support this development?

2.2. Entering your Goals in My HR Connection:

	Step	Steps to Execute
1	You will receive an email notification from MyHRConnection@ notifications.ontariotechu.ca that tells you that the goal setting task has been assigned to you. Select the link to log in to My HR Connection or navigate from the performance development website.	

	Step	Steps to Execute
2	Complete **Action items** from the Welcome Page. Select **Goal Setting Conversation** to begin the process.	

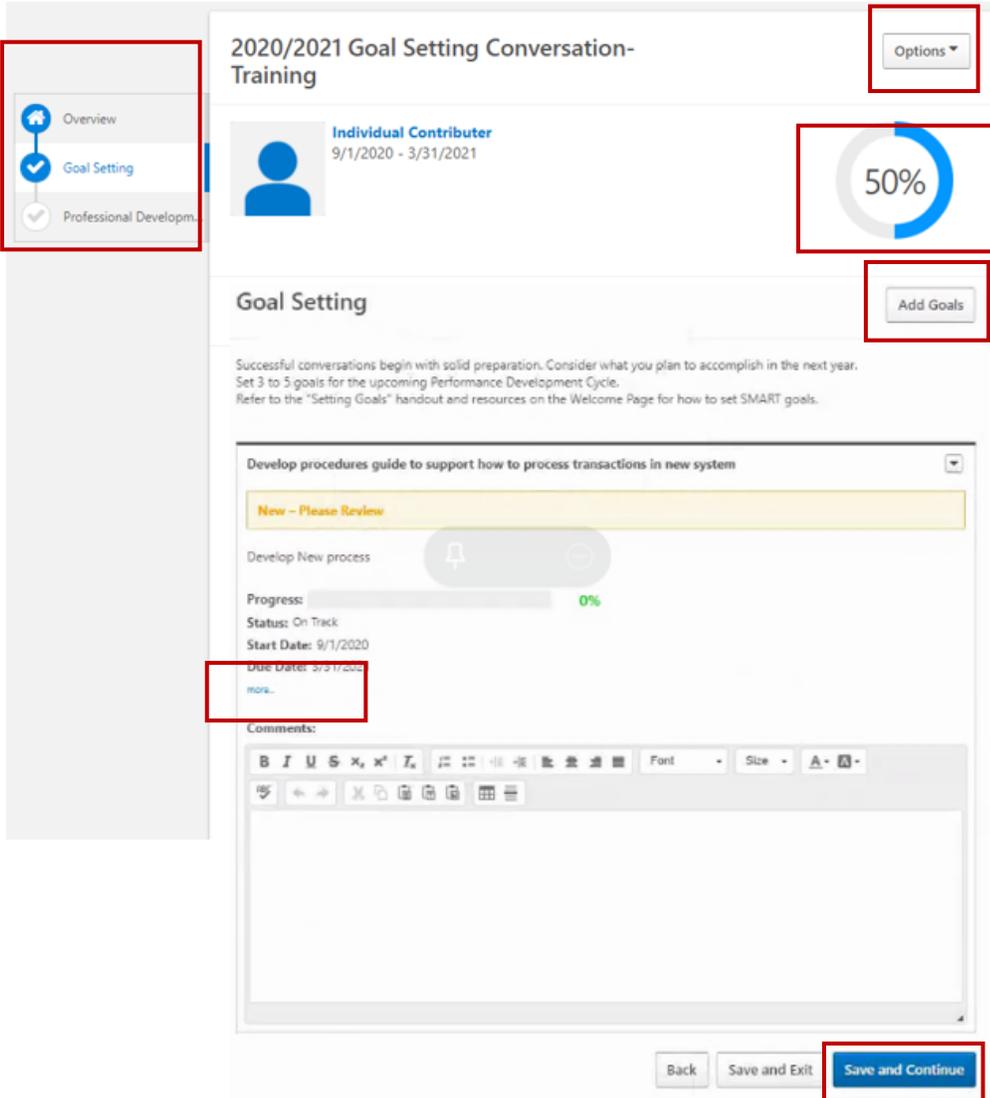|	Step	Steps to Execute
3	My HR Connection displays the process overview and the steps to complete the task. Follow the workflow steps to understand where you are in the process. Review the related status, which indicates the percentage of completion. Select the **Get Started Button** to begin the task.	

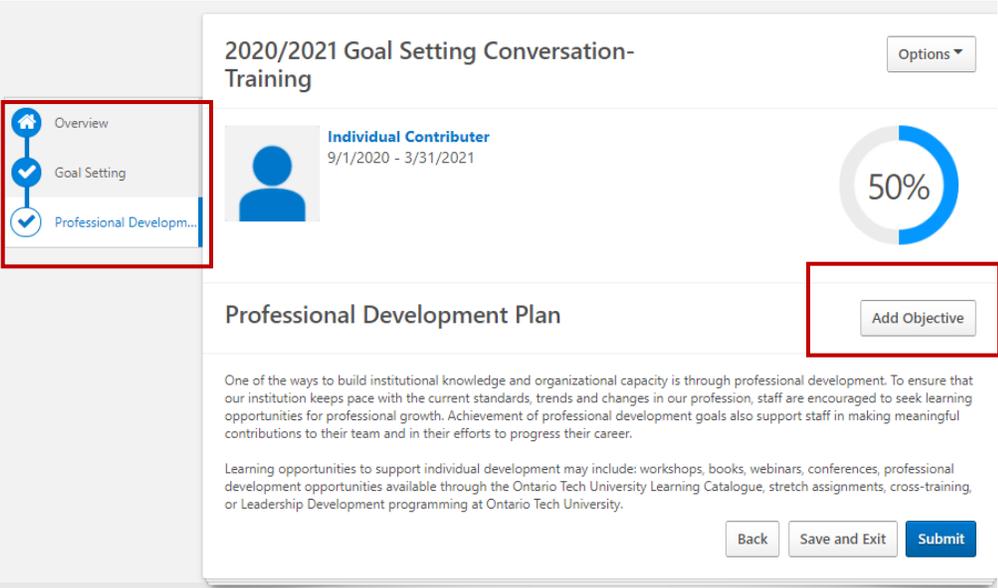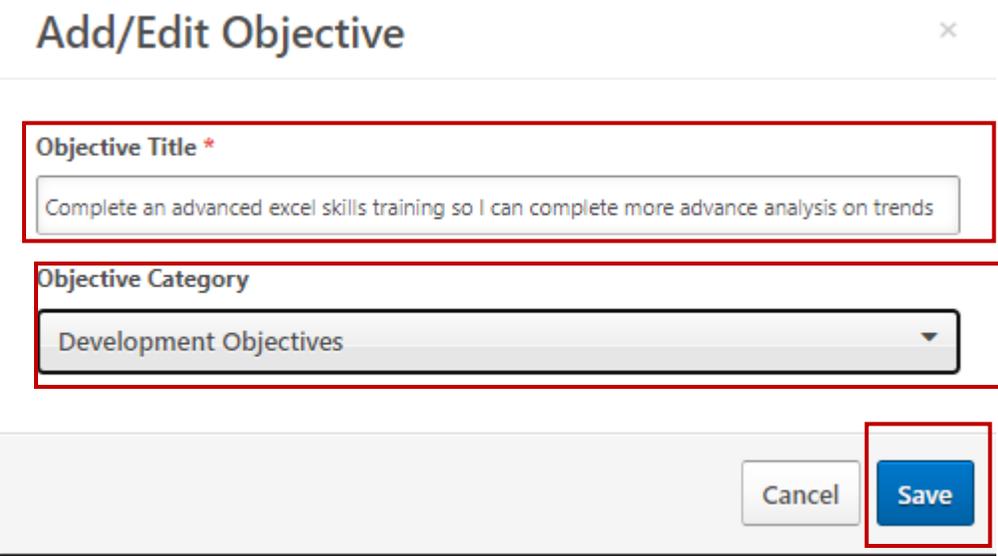|	Step	Steps to Execute
4	The Goal Setting Conversation activity is launched. Select **Add Goals** to open the Create Goals form. (see image 5) Repeat this process to enter all of your goals. Clicking the **Save and Exit** button will save where you are in the process and exit the form. When you have finished entering your goals click **Save and Continue.**	

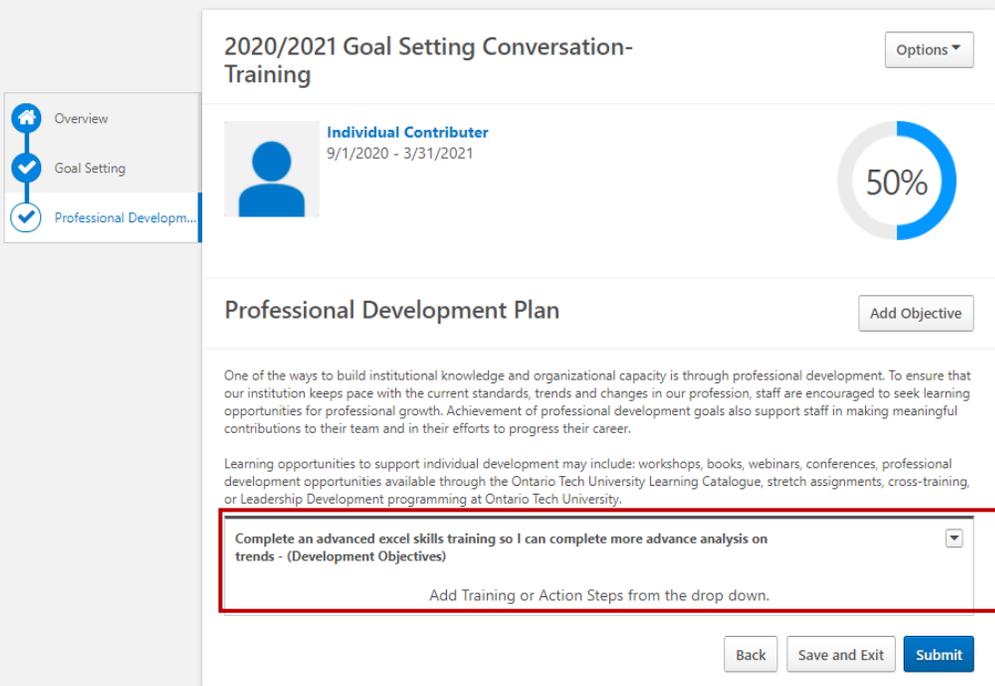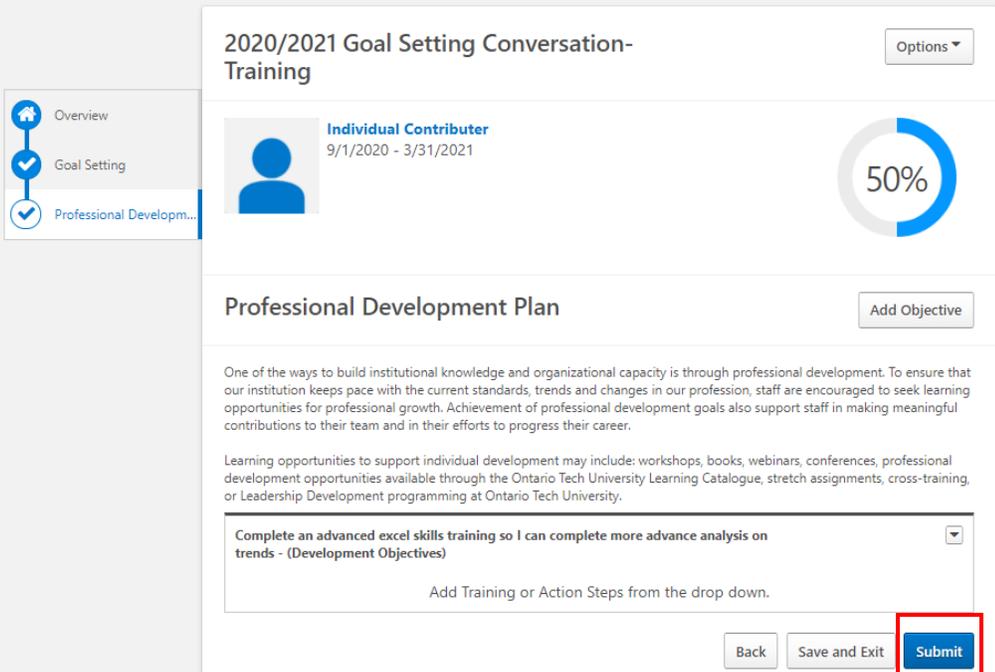| Step	Steps to Execute
5	When the Create Goals form opens - enter the performance goal title, description, start and end date. Select the **Add Tasks or Outcomes** button to define the action items that you will complete to attain your goal. *(OPTIONAL) Clicking the check box Visibility - allows other members of your team to see and align goals. This could be used for a department wide goal or a team goal. Click **Save.**	**Create Goals** Enter details or import using the SMART Wizard or the Library. All fields marked "*" are required **Performance Goals *** Improve Banner Data Quality by implementing new audit reports **Alignment** Not currently aligned Align **Description** B I U S I_x	≔ ☰	≟ ≟	ABC Improve Banner Data Quality by implementing new audit reports **Start Date** **Due Date *** 9/1/2020 3/31/2021 **Tasks and Outcome** Add Tasks or Outcome **Visibility** ☑ Allow other users to see and align Cancel Save

Step	Steps to Execute
6 **Add Tasks or Outcomes** Include a description of the task that will be completed to achieve your goal. Enter the date the task is due by and select include target to include the metric of the task outcome. Click **Done.**	

	Step	Steps to Execute
7	Click **Add Tasks or Outcome** when there is more than one activity required to complete the goal. (this is usual)	

	Step	Steps to Execute
8	**Example of SMARTER goal with a task with a target outcome and task without a target outcome**	**Create Goals** Enter details or import using the SMART Wizard or the Library. All fields marked "*" are required **Performance Goals** * Improve Banner Data Quality by implementing new audit reports **Alignment** Not currently aligned [Align] **Description** Improve Banner Data Quality by implementing new audit reports **Start Date** 9/1/2020 **Due Date** * 3/31/2021 **Tasks and Outcome** Description: Build a report to ensure student records are complete to improve data quality by 10% Target: 10 % Start Date: 10/1/2020 Due Date: 11/30/2020 Description: Build a report to verify student enrollment in course Start Date: 1/1/2021 Due Date: 3/31/2021 [Add Tasks or Outcome] **Visibility** ☑ Allow other users to see and align [Cancel] [Save]

	Step	Steps to Execute
9	Select **Add Goals** when you need to enter additional goals into the system. When you have saved any new goals, the system will display status 'New-Please Review.' Review the goals and tasks by selecting the **more** link. Click **Options** to print a copy of your Goals. You have now completed 50% of the goal setting conversation process. Click **save and continue** to move to the Professional Development section.	

	Step	Steps to Execute
10	Add a Professional Development Activity by selecting **Add Objective**.	
11	Enter the development objective title. Select **development objective** from the objective category dropdown. Click **Save**.	

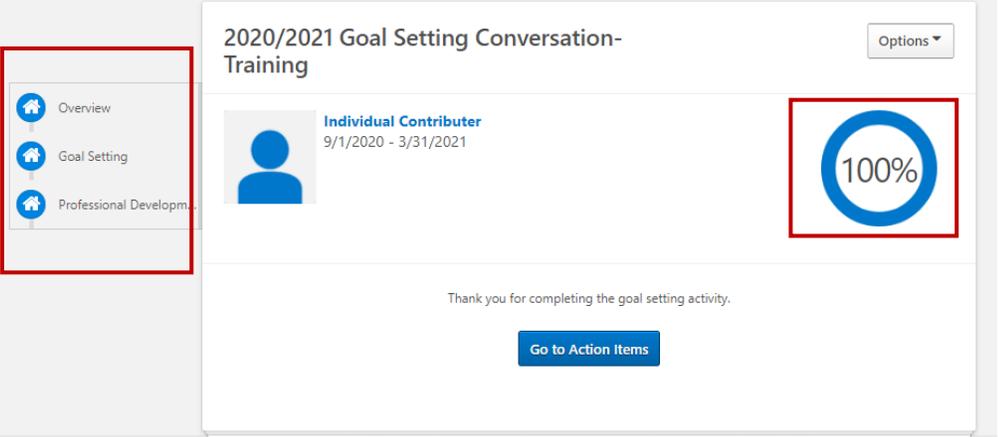|	Step	Steps to Execute
12	When the Professional Development activity has been entered, select the drop down to add an action step for completion.	
13	Complete Action Step Title and select activity category from the drop down. When the action step is completed, click **Submit**. For each professional development activity, you wish to complete, click **Add Objective** Click **Submit** when all objectives have been entered.	

	Step	Steps to Execute
14	The submit button will send the workflow notification to your manager to review your Goals and Professional Development Plan. You will receive confirmation that the Goal Setting Conversation action item is complete and submitted to your Manager for Review and Feedback.	

Table 1: Goal Setting Conversation