

Adding Goals to an Appraisal

1. Select Set Goals

Option One: Select **Set Goals** if you wish to add goals to your own appraisal. The ability to add goals is subject to your organization's settings.

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Jim Halpert

My Appraisals

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Home

Current Appraisal

DUE 7/13/2016 PERIOD 7/2/2014 - 7/13/2016

Set Goals

Option Two: If you are a manager, select **Set Goals** for the employee, whose appraisal you would like to add a goal to.

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Current Appraisal

DUE 7/13/2016 PERIOD 7/2/2014 - 7/13/2016

Set Goals

Direct Reports (4)

Sort by Due Date

Current Future

Find Direct Reports

Stanley Hudson

Notes • Profile

Sales Associate

7/3/1989 - 7/13/2016

Set Goals

Scorable 6/13/2016

Approval

Archive by 7/13/2016

2. Click on Add a goal

Add a goal

Goals 50%

Use this section to add qualitative goals for the employee. These goals should be big picture competencies that the employee should be focused on this year.

For instructions on how to add goals, copy and paste these links in another tab of your browser:

Managers: <http://www.trakstar.com/how-to-add-goals-to-an-employees-appraisal/>

Employees: <http://www.trakstar.com/how-to-add-a-goal-to-your-own-appraisal/>

3. Add an existing goal or Create a new goal

Existing goals are goals that you have already added to an appraisal in the past. When creating a new goal, add a Goal Name and Goal Description.

Add a goal

Add an existing goal
 Create a new goal

GOAL NAME

GOAL DESCRIPTION

T Bold *T* Italics

-

 Bullets

- 1

 Numbers

4. Save Goal



5. Insert the Goal into the correct section

Add a goal

Complete Project Sirius

In section: Goals

Cancel **Insert Goal**



GOAL SUCCESSFULLY ADDED

The goal has now been successfully added your appraisal.



6. Edit or Remove a Goal

Once a goal has been added the appraisal, you can edit or remove the goal using the icons across from the goal name.

Complete Project Sirius added by Jim Halpert

Complete all aspects of this project in alignment with my team.

Edit

Not Effective
Minimally Effective
Effective
Highly Effective
Exceptional

^ **Measurements (0)**
+ **Add Measurement**

^ **Notes (0)**

Add a note...

ADD MEASUREMENTS AND NOTES

Add measurements and notes to track your progress against this goal or other competencies on your appraisal. These measurements and notes help to track performance throughout the year and are available during the scoring phase of your appraisal for supporting documentation.