HOW TO ADD AND MANAGE YOUR OBJECTIVES

GUIDE FOR EMPLOYEE

ADD A SMART OBJECTIVE

CR&D

Employee Dashboard > CR&D

Search by review name

Current Appraisals

Review Name	Appointment	Manager	Due	Status
Step 1 - Objectives And Progress Review 2021/...	502360-21	Star Trainer	01-Mar-2022	Awaiting Employee Action Objectives And Progress Review 2021/22
Step 2 - Capability Framework 2021/22	502360-21	Star Trainer	01-Mar-2022	Awaiting Employee Action Capability Framework 2021/22
Step 3 - Development Plan 2021/22	502360-21	Star Trainer	01-Mar-2022	Awaiting Employee Action Development Plan

Launch

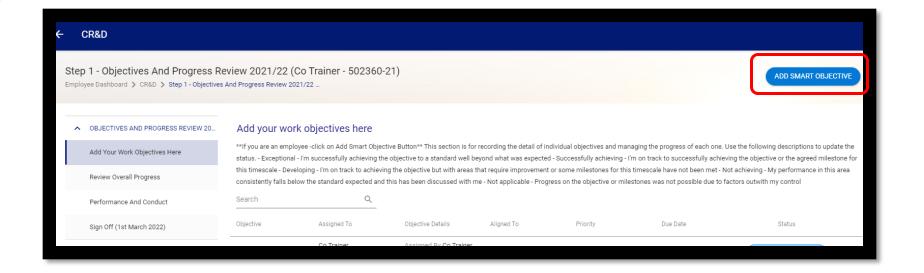Print Review

Launch the **Step 1 - Objectives and Progress Review 2021-22** by clicking on the ellipsis and then clicking **Launch**.
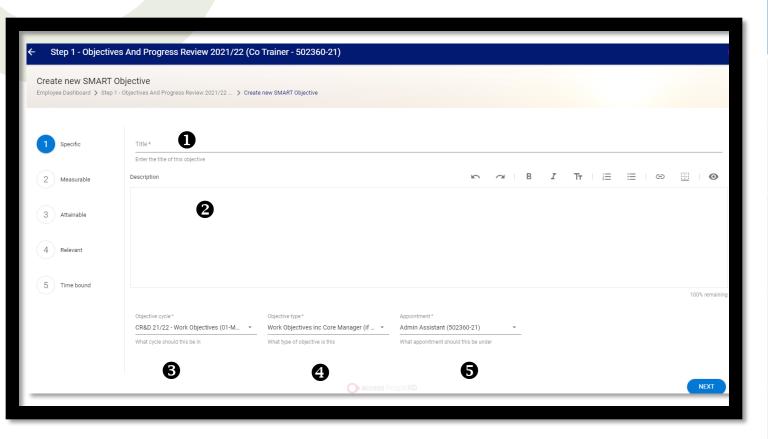
You will then see the following screen appear. To add a new objective, click on the **Add SMART** objective button.

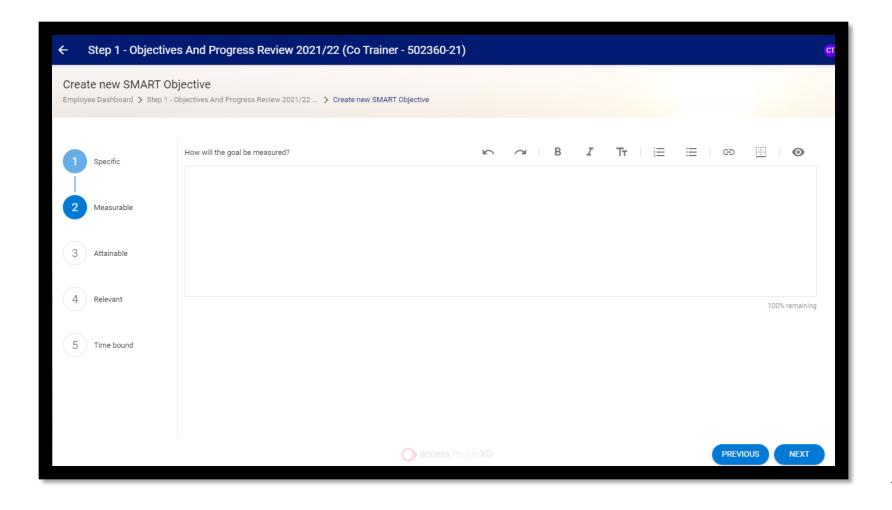You will then see a SMART Builder to help you to form your objective.

The SMART builder will launch providing you with different fields that you have to complete.

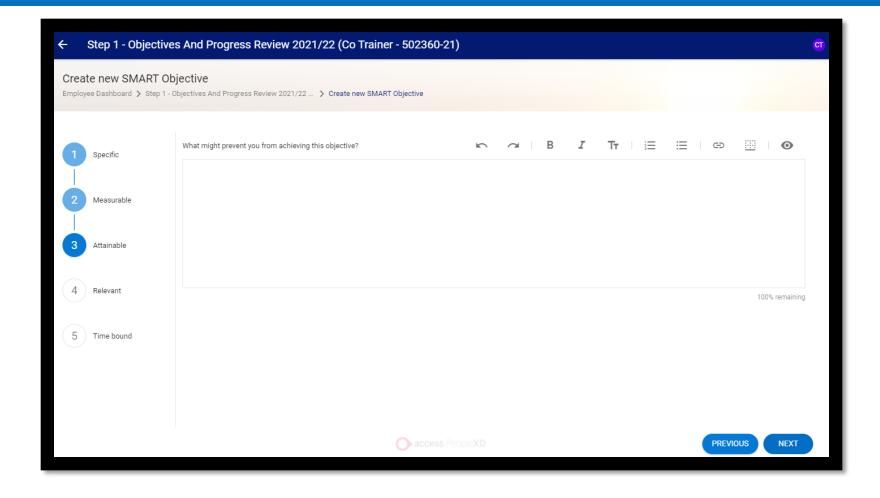|	Field name	What to put in the field
1	Title	A heading for your objective
2	Description	A full description of what the objective is
3	Objective cycle	There is only one option from the list to choose from
4	Objective Type	Again there is only one option on the list to choose from
5	Appointment	This is the job that the objective is linked to

In the **Measurable** part, you will be asked how will the objective be measured. This is a free text box which allows you to input what sort of things have to be in place to show that you have delivered the objective. Once you have completed this, click on the **next** button.
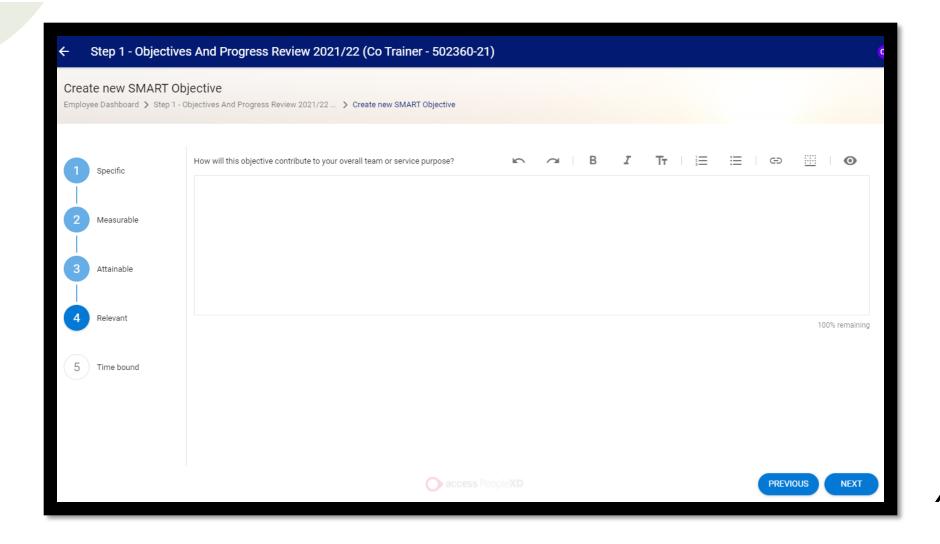
In the **Attainable** section, you are asked to consider what might prevent you from achieving this objective. This is a free text box which allows you to input what you think could potentially prevent you from delivering this objective so that you can consider in advance whether the objective is realistic. Once you have completed this, click on the **next** button.
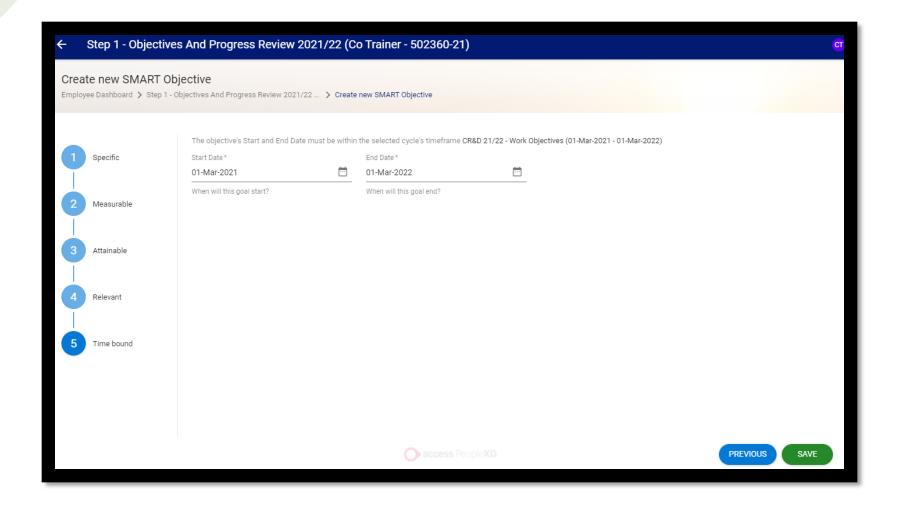
In the **Relevant** section, you are asked to consider how the objective contributes to the overall team or service purpose. This is a free text box which allows you to link your objective to the wider purpose of the team and/or service. Once you have completed this, click on the **next** button.

In the **Time bound** section, you can see the timeframes for this particular objective cycle. Please note that these should not be changed. Now click on the **Save** button.
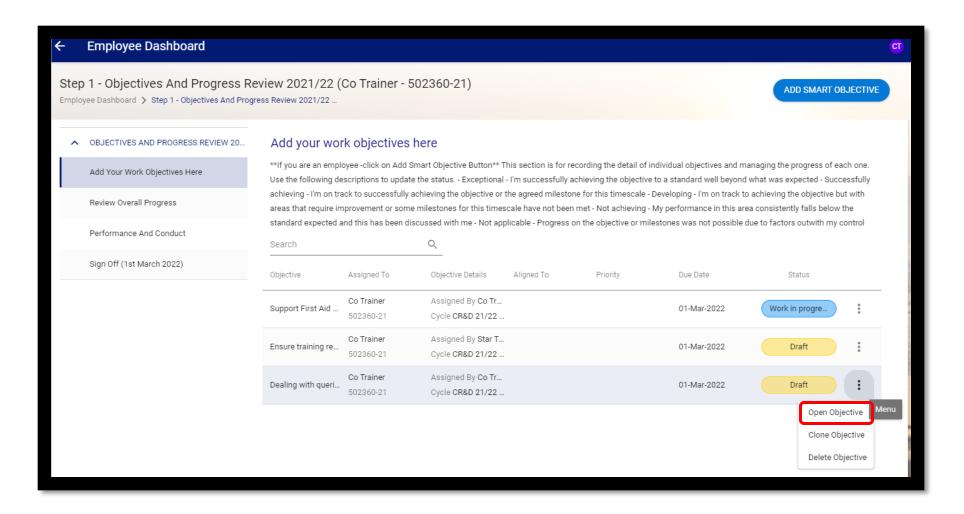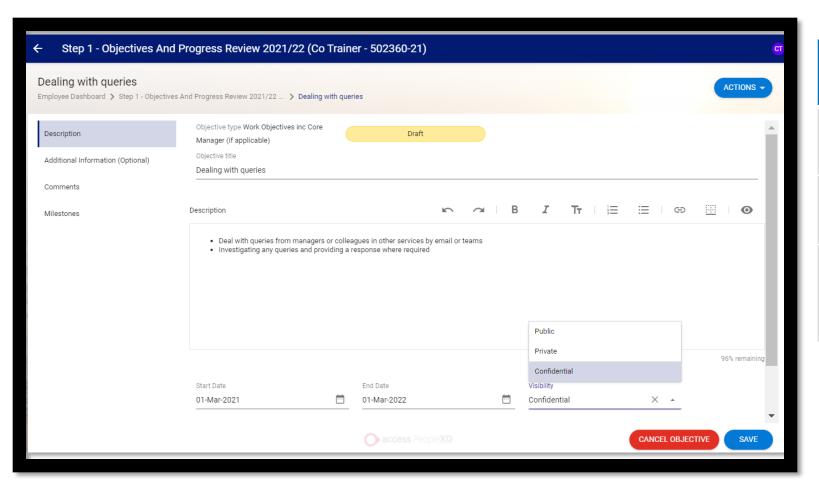
HOW TO MANAGE YOUR OBJECTIVES

Once you have added in the objective, it will appear on your list with a draft status. Click on the ellipsis against the objective and the **Open Objective** button will allow you to open up the objective. The **Clone Objective** functionality allows you to copy that objective and finally you can **Delete** an objective which has a draft status.
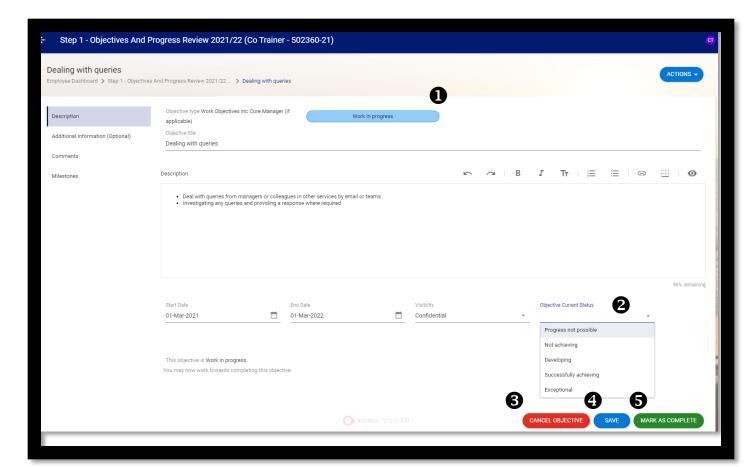
Once you have opened up the objective, you can add more information and updates to the objective. You will notice a new field on this page called **Visibility**. There are 3 options available from the drop down. Please see table on the right for a description of each option. Remember to use the **Save** button if you make any changes.
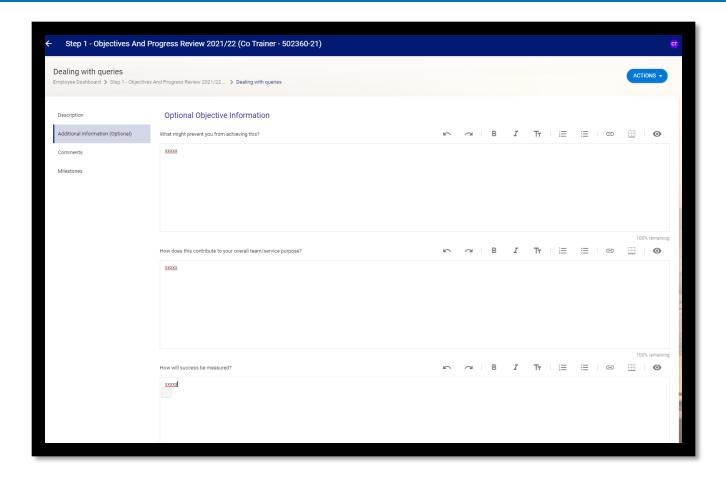

Visibility Options	Description
Public	All users can view the objective
Private	Only that specific user can view the objective
Confidential (This is the default setting)	The user and their manager can view the objective

|	Field name	Description
1	**Status**	When you hit the save button, you will notice that the status will change from "Draft" to "Work in progress"
2	**Objective Current Status**	This field will appear when the status is changed to "Work in progress". This allows you to add a status against the objective.
3	**Cancel Objective**	If the objective was entered in error, you can cancel this. The status will then change from "Work in progress" to cancelled. You cannot delete objectives if the status has been changed to "Work in progress".
4	**Save**	Allows you to save information added
5	**Mark as Complete**	If an objective has been delivered, you can mark this as complete. Once an objective has been marked as complete, you can no longer edit it.
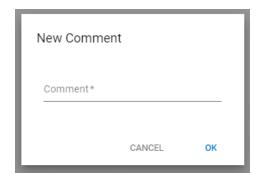
In the **Additional Information** tab you will see the information you had previously added when you first created the objective by using the **SMART builder**. You can edit the information on this screen.

In the **Comments** section, both you and your manager can add comments relating to this objective. You can also read each other's comments. To do this, click on the **View/Add** button. On the next window click on **Add Comment**. This will then bring up a box like the one on the right which allows you to add your comments. Any comments added will be listed on the page below.
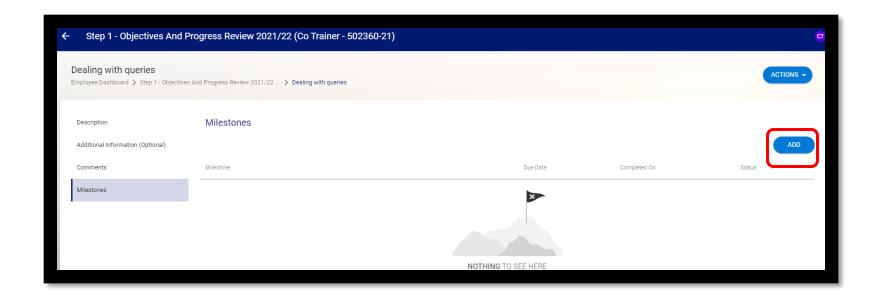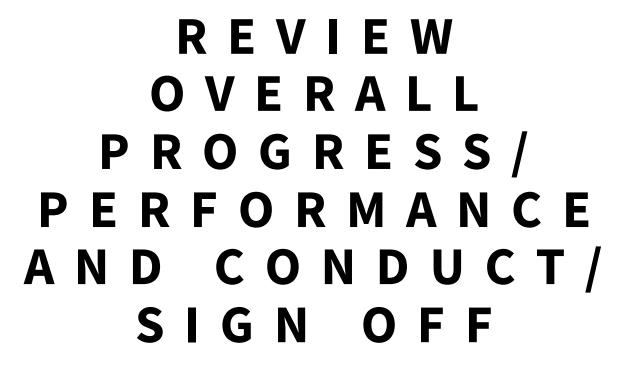
You can also add **Milestones** to the objective and track the progress of these. To add a **Milestone** just, click on the **Add** button and then you will see a box pop up like the one below for you to fill in the relevant information.

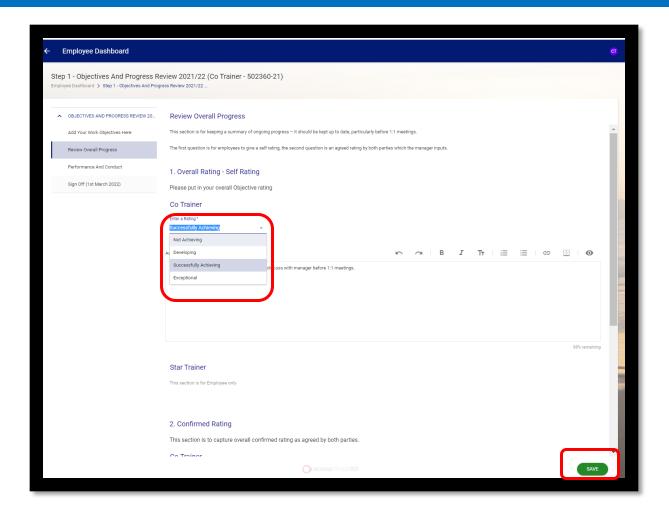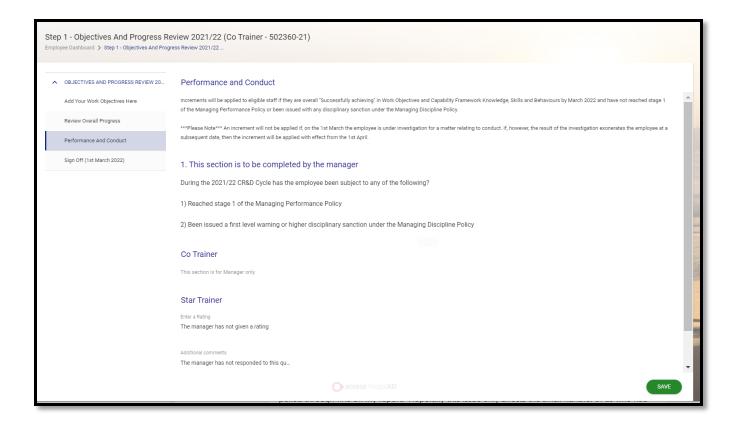# REVIEW OVERALL PROGRESS/ PERFORMANCE AND CONDUCT/ SIGN OFF

The **Review Overall Progress** section allows you to add an **Overall Rating** for all your objectives. The first question is added by yourself and the second question is completed by your manager to confirm the agreed rating by yourselves. This section can be updated at any time in the year.
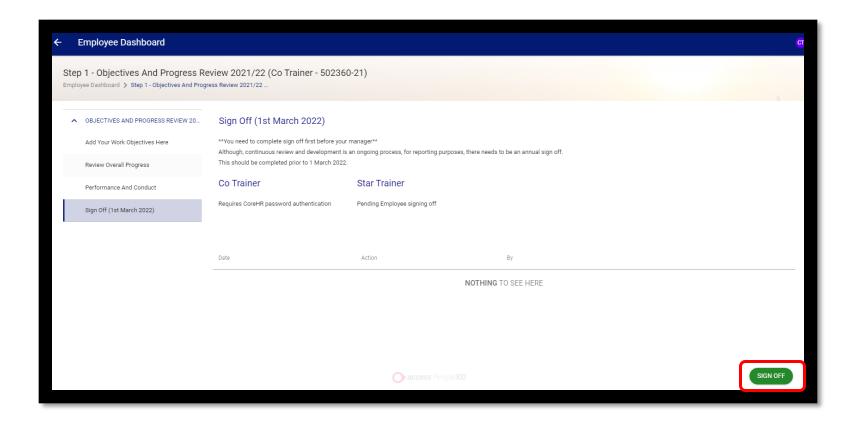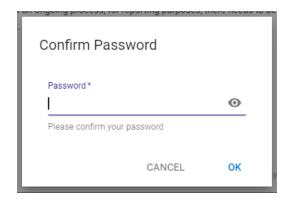
The **Performance and Conduct** section is completed by the Manager when they Sign Off to confirm whether an employee is currently subject to either Managing Performance or Managing Discipline Policies which would affect entitlement to an increment if eligible. **The employee does not have to complete anything on this section.** Your manager's response will be visible once completed.

To **Sign off** the Objectives part, you just need to click on the **Sign Off** button. You will then see a prompt for your CoreHR password. Once you have completed the sign off, your manager will be able to sign off.
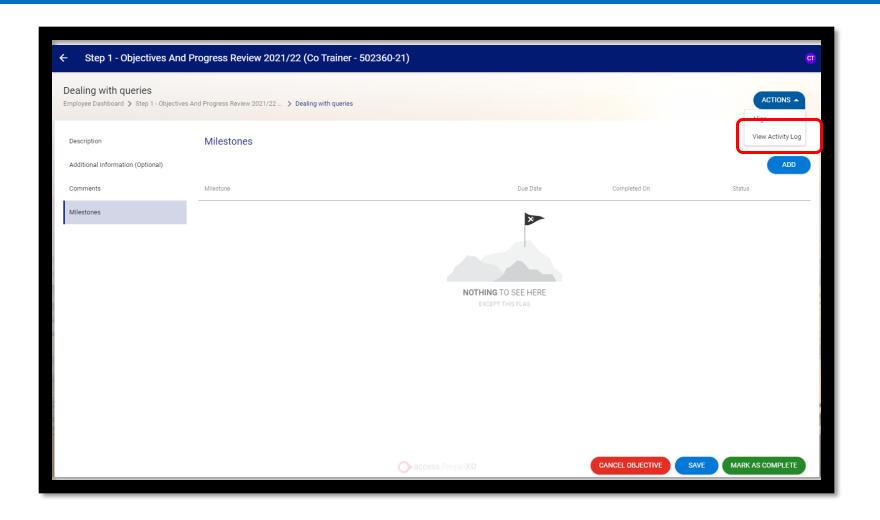
← Employee Dashboard

Step 1 - Objectives And Progress Review 2021/22 (Co Trainer - 502360-21)
Employee Dashboard › Step 1 - Objectives And Progress Review 2021/22 ...

∧ OBJECTIVES AND PROGRESS REVIEW 20...

Add Your Work Objectives Here

Review Overall Progress

Performance And Conduct

Sign Off (1st March 2022)

Sign Off (1st March 2022)

You need to complete sign off first before your manager
Although, continuous review and development is an ongoing process, for reporting purposes, there needs to be an annual sign off.
This should be completed prior to 1 March 2022.

Co Trainer

Star Trainer

Requires CoreHR password authentication

Pending Employee signing off

Date   Action   By

NOTHING TO SEE HERE

access PeopleXD

SIGN OFF

Confirm Password

Password *

|

Please confirm your password

CANCEL   OK

OTHER ADDITIONAL FEATURES

At the top of the screen, there is an **Action** button which allows you to view the Activity Log.

The **Activity Log** details all the updates and changes made by yourself and your manager. Your manager is able to view this information as well.