



ACHIEVEonline USER GUIDE

EMPLOYEE USER GUIDE

This user guide is intended to help you navigate ACHIEVEonline. Instructions are provided for both employee users and manager users.

ACCESS ACHIEVEonline

To access ACHIEVEonline, go to the ACHIEVEonline information landing page at hr.uci.edu/partnership/achieveonline and click the GO TO ACHIEVEonline button. You will be directed to the UCInetID login page.

From the login page:

1. Enter your username and password.
2. Click the login button.
3. You will be taken to the ACHIEVEonline Welcome page.
4. Employees will see two tabs: Home and Performance.
5. Managers will see three tabs: Home, Performance and Reports.

INSTRUCTIONS FOR EMPLOYEES

(Managers should read this section before moving on to the Manager's section)

Under Home, there is a single dropdown menu choice:

WELCOME

The WELCOME page is your main page and includes quick links to all the important functions of the ACHIEVEonline system:

MY GOALS
QUARTERLY CHECK-IN(S)
USER GUIDE
YOUR CHECK-IN(S)
YOUR INBOX

In the upper right hand corner of your screen, there is a HELP button that features a robust database of useful information.

Return to the WELCOME page any time you need to get your bearings.

PERFORMANCE TAB

There are two dropdown menu choices from the PERFORMANCE tab:

MY GOALS
QUARTERLY CHECK-IN



The screenshot shows the main dashboard of the ACHIEVE online Performance Check-in System. At the top, there is a blue header with the "ACHIEVE online" logo and a "Log Out | Help" link. Below the header is a navigation bar with "Home" and "Performance" (the latter being selected). A dropdown menu under "Performance" shows "My Goals" and "Quarterly Check-in". The main content area is titled "WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM" and features three icons: "MY GOALS", "QUARTERLY CHECK-IN(S)", and "USER GUIDE". To the right, there are two boxes: "YOUR CHECK-IN(S)" showing "No current tasks in progress" and "YOUR INBOX" showing "No items". Below these is a "CONTACT" link. A list of key dates is provided:

- 11.01.17 January Check-In Opens
- 11.01.17 - 12.31.17 Employee and Manager Feedback Period
- 12.31.17 Employee Self Check-In Due
- 12.13.17 - 01.31.18 Manager Completes Check-In; Employee and Manager Discussion Period
- 01.31.18 January Check-In Closes

MY GOALS

Use this section to view, create, edit and/or assign progress to your goals.

The screenshot displays the "My Goals" section within the Performance module. At the top, there is a breadcrumb trail: "Home > Goals > My Goals". The main heading "My Goals" is on the left, and on the right, there is a "Create" button with a red arrow pointing to it, and an "Options" dropdown menu. Below the heading is a circular progress indicator showing "47% TOTAL COMPLETE" with subtext "Total Weight: 150% My Goals". A "My Goals" filter button is located below the progress indicator. The search area includes a "Current Period" dropdown set to "10/1/2017", a date picker for "12/31/2017", and a "Search" button. There are also checkboxes for "Display Cancelled" and "Hide Completed". A "Send Approval Request" button is positioned at the bottom right of the search area. The "My Goals" list below shows a single goal: "45% Analyze Budget Activity" with a status of "Pending Modification Approval", a due date of "1/31/2019", a goal type of "Performance Goal", and a weight of "25%".



NOTE: All fields marked with an asterisk are required fields, with the exception of the WEIGHT field, which is marked as required, but will not currently be required for UCI staff members. If you elect not to weight your goals, you should enter a value of 0 (zero.) If you elect to weight your goals, total weight does not have to add up to 100.

MORE ABOUT WEIGHTING GOALS & MILESTONES

Weight is really meant to identify goal priority and importance. For example, a higher weighted goal indicates a higher priority goal. If you elect to use the weighting function for goals, please be aware that the TOTAL COMPLETE dial on your MY GOALS page is an indication of the progress toward your goals and is calculated using the weight of each goal, if any, and the progress of each goal during the current check-in period.

However, if you enter MILESTONES in support of your goals, you must enter weights. The MILESTONE weighting field accepts any numerical value, including zero. While weighting is required for milestones, you may use zero as a value if you do not want to use the weighting function at this time. Weighting for MILESTONES must add up to 100.

CREATE GOALS

The screenshot shows the "Create Goals" form in the ACHIEVE online system. At the top, there is a blue header with the text "Create Goals". Below this, a paragraph explains that goal planning is the foundation of ACHIEVE and that goals can be created, edited, and canceled at any time during the quarter. It also notes that goals will appear on quarterly check-ins corresponding to their start and end dates. Below the paragraph, there are two links: "UCI Strategic Goals: https://strategicplan.uci.edu/" and "Links to Department Strategic Goals: https://strategicplan.uci.edu/unit-plans/index.php". A red line indicates that all fields marked with an asterisk are required. The form fields include: "Title *" (text input), "Description" (rich text editor with bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink buttons), "Start Date" (calendar icon, date: 10/19/2017), "Due Date *" (calendar icon, date: 12/31/2017), "Weight *" (text input with value 0 and a red arrow pointing to it), "Goal Type *" (dropdown menu with "Select" option), "Milestone" (button: "Add Milestone"), "Attachments" (button: "Choose File", with a note: "Upload up to 3 attachments. Maximum upload 5mb"), and "Assignment *" (radio button selected for "Yourself").



Follow these steps to create a new goal:

1. Click the CREATE button.
2. Enter the title of one of your goals.
3. Enter a brief description of the goal.
4. Enter a start and end date for the goal.
 - Q. What if I don't have an end date for my goal?
 - A. You must have an end date for your goal. All goals should be SMART goals – specific, measurable, agreed upon, realistic, and time bound.

NOTE 1: The order in which you enter your goals is not important. However, you may want to note that the first goal you enter will appear at the bottom of your goals list.

NOTE 2: You can create/add as many goals as you would like; however, you must have at least one active goal. We recommend not having more than five active goals active during any check-in period.

NOTE 3: Goals can be created/added at any time, and goals not completed during a check-in period roll over into the next check-in period.

ADD WEIGHT PERCENTAGE - OPTIONAL

Per the information discussed above regarding weighting of goals, enter goal weighting if desired, or enter a value of zero (0).

SELECT A GOAL TYPE

A screenshot of a web form for creating a goal. At the top, there are three input fields: "Start Date" with the value "10/19/2017", "Due Date *" with the value "12/31/2017", and "Weight *" with the value "0". Below these is a "Goal Type *" dropdown menu currently set to "Performance Goal". A red arrow points to the dropdown arrow. The dropdown menu is open, showing "Select" and "✓ Performance Goal". Below the dropdown is an "Attachments" section with a "Choose File" button and the text "Upload up to 3 attachments. Maximum upload 1mb". At the bottom is an "Assignment *" section with a radio button selected for "Yourself".



Medical Center employees have two goal type options – CEMRP goals and non-CEMRP goals. Both types of goals should be entered into the ACHIEVEonline system, while HR Connect will continue to be the system of record for the formal establishment of CEMRP annual incentive objectives, as well as the evaluation and approval of objectives results. Including them in quarterly check-in discussions will help ensure progress is reviewed regularly throughout the fiscal year.

For campus and health sciences employees, there is only one type of goal – PERFORMANCE GOAL.

ADD MILESTONES

A screenshot of a web application dialog box titled "Add Milestone" with a close button (X) in the top right corner. The dialog contains a text input field for "Description". Below it are three fields: "Start Date *" with a calendar icon and the value "10/19/2017", "Due Date *" with a calendar icon and the value "12/31/2017", and "Weight *" with a text input field containing "0" and a percentage sign "%". At the bottom right are "Cancel" and "Done" buttons.

Milestones break your goal into manageable tasks/activities. If you choose to use the milestones field, enter description, start date and due date. Please note that the due date must be within the goal date range. Again, the weight field is optional (even though it is marked with an asterisk), and all notes about the weight value described above, apply.

NOTE 1: You can add as many milestones as you want. To edit or delete a milestone, click on the dropdown to the right.

NOTE 2: If you enter milestones, you must enter weights. As a point of clarification, weights indicate priority of milestone, e.g., the higher the weight, the higher the priority of the milestone. The total of all weights entered must equal 100 percent (automatically calculated by the system).

ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) per goal.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

ASSIGNMENT

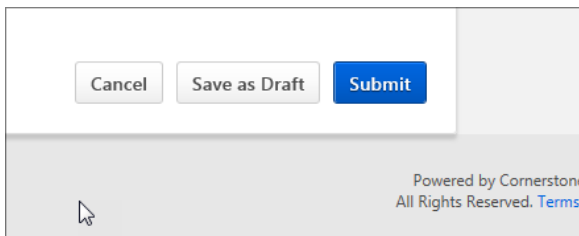
Employees will see only one option under ASSIGNMENT, and that is YOURSELF. All goals you create must be assigned to yourself. You cannot assign goals to anyone else at this time.



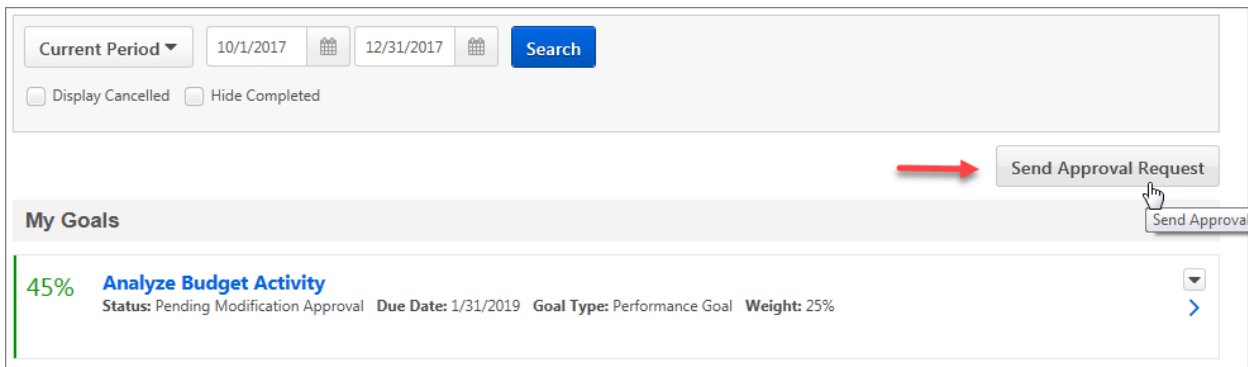
SAVE OR SUBMIT

Once you have entered your goal and related information, you may either:

- a. **SAVE AS A DRAFT**; this allows you to come back to your work at a later date without submitting the information to your manager
- b. **SUBMIT**; this option automatically sends a request to your manager's ACHIEVEonline inbox for approval by your manager



On the right hand side, near the bottom of the upper half of the page, you will see a SEND APPROVAL REQUEST button (see screenshot below). Our vendor cannot remove this button at this time, but the button does not function. If you click it, it does nothing. We are working to either have the button removed or implement the email notification functionality. Thank you for your understanding.



Once you save or submit, the system will return you to your MY GOALS page.

MY GOALS PAGE

At the top of the page you will see a real-time TOTAL COMPLETE indicator. This number (percentage) represents your total progress towards all goals. All notes under Weighting Goals and Milestones apply.



A screenshot of the "My Goals" dashboard. At the top left is the title "My Goals" and a "Create" button. To the right is an "Options" dropdown menu. In the center is a circular progress indicator showing "0%". To the right of the indicator, it says "TOTAL COMPLETE" with "Total Weight: 100%" and "My Goals" below it. A red arrow points from the left towards the "0%" indicator. Below the indicator is a "My Goals" tab. At the bottom, there is a "Current Period" dropdown menu, two date input fields (10/1/2017 and 12/31/2017), a "Search" button, and two checkboxes: "Display Cancelled" and "Hide Completed".

Under the indicator you will see one tab option:

MY GOALS

This tab opens a page that displays all goals assigned to you. Only the goals that fall within the current quarterly check-in period will be shown. If you want to view or edit a goal outside the current check-in period, choose the CURRENT PERIOD drop-down menu and select another check-in period. Alternatively, you may view outside the current period by entering a date range in the fields to the right of the CURRENT PERIOD field. In addition, you can choose to view cancelled goals and/or hide completed goals. To return to the current period, simply go to the CURRENT PERIOD dropdown menu and select current period.

A screenshot of the "My Goals" dashboard showing progress. The circular progress indicator now shows "47%". To the right, it says "TOTAL COMPLETE" with "Total Weight: 150%" and "My Goals" below it. The "My Goals" tab is selected. The "Current Period" dropdown menu is set to "10/1/2017" and "12/31/2017". A "Send Approval Request" button is visible on the right. Below the filter section is a list of goals under the heading "My Goals":

- 45%** **Analyze Budget Activity**
Status: On Track | Due Date: 1/31/2019 | Goal Type: Performance Goal | Weight: 25%
- 100%** **Develop New Financial Reporting Policy for Contracts and Grants**
Status: Completed | Due Date: 12/31/2017 | Goal Type: Performance Goal | Weight: 50%
- 0%** **Document, track and drive performance**
Status: Not Started | Due Date: 10/31/2017 | Goal Type: Performance Goal | Weight: 25%



NOTE: Your manager has full access to your MY GOALS section and can perform any and all of the same functions that you can perform in this section. If something changes, and/or you see a new goal assigned to you, and you did not make the change(s), check the VIEW HISTORY function that is a dropdown option from the dropdown button to the far right of each goal to see if your manager has made changes. Please discuss any changes that you do not understand with your manager.

STATUS OF GOAL

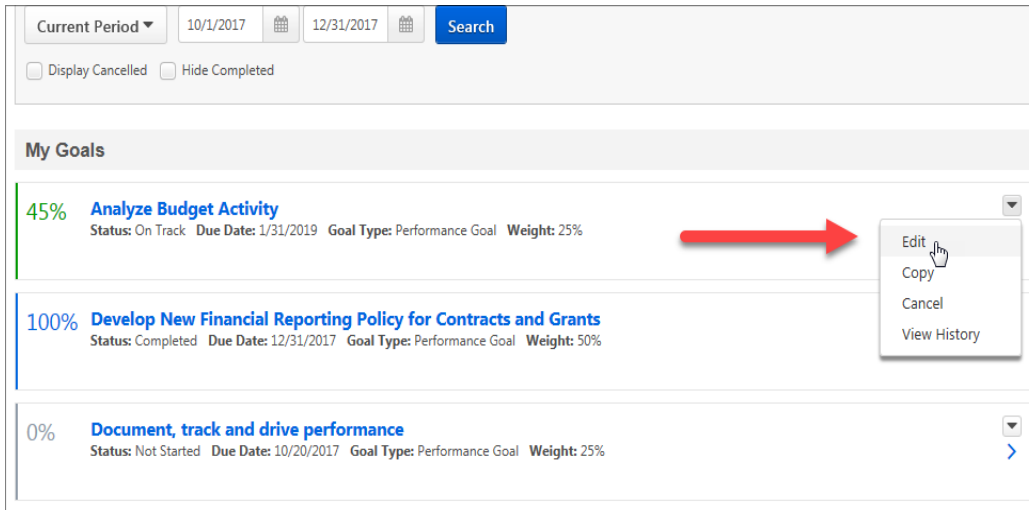
The status of a goal is indicated as follows:

- DRAFT - indicated by the color black
- PENDING - submitted to manager, pending (awaiting) approval; indicated by the color beige
- NOT STARTED - indicated by the color gray
- ON TRACK - indicated by the color green
- BEHIND - indicated by the color yellow
- COMPLETED - indicated by the color blue
- CANCELLED - indicated by the color green

(NOTE: Green is also used for goals that are on track. The system considers a cancelled goal to be on track since you, as the user, have set the cancelled status.)

GOAL ACTIONS

Depending on the status of each goal, you will have different options available for managing that goal. The dropdown button on the far right of the goal section will show you the options available.



- EDIT
- COPY
- DELETE
- CANCEL
- ADVANCE
- VIEW HISTORY
- ADD A COMMENT



EDIT

Select this option to change anything related to your goal including title, description, start date, end date, milestones, etc.

COPY

Goals can be copied using the dropdown option located to the far right of an individual goal field.

Q. Why would I want to copy a goal?

A. If you have two goals that are similar, you can copy one and paste it into the description field of the new goal to save time and effort.

DELETE

This function is self-explanatory. If the goal is in draft form (never submitted to manager for approval), it can be deleted. Please be advised that once you delete a goal, it cannot be recovered.

CANCEL

If a goal has been submitted to your manager for approval – whether or not it has already been approved by your manager – you must cancel the goal, rather than delete the goal, if you want to remove it from the system. If you use the cancel function, you have the ability to view all cancelled goals using DISPLAY CANCELLED. Click the DISPLAY CANCELLED checkbox that is located under the CURRENT PERIOD dropdown near the top of the page under the MY GOALS tab.

NOTE: If tasks have been completed for a goal that you are now cancelling, and you want to be credited for the task(s) you completed, use the EDIT function and change the existing due date to the date you are cancelling the goal. Save the edited, updated goal rather than cancelling the goal. Make a note in the comments section that the goal has been cancelled on this particular date but tasks were completed and therefore archived for the check-in discussion. This will ensure that the task(s) are visible to both you and your manager for the check-in discussion.

ADVANCE

This function allows you to roll an approved goal forward into the next check-in period, IF THAT GOAL HAS EXPIRED. Click ADVANCE and enter your new start and end dates (which must fall within the next quarterly check-in date range) for the goal(s) you are advancing. Using this function will automatically reset the status of the goal to ON TRACK. Like any other edit, ADVANCING a goal requires manager approval, so click SUBMIT after making your changes.

VIEW HISTORY

You can also view history of any goal, e.g., when the goal was created, updated, cancelled, etc.

Also, on the far right of each individual goal section is a right-pointing carrot (arrow) that allows you to open and expand the goal.



Display Cancelled Hide Completed

My Goals

45% **Analyze Budget Activity**
 Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

Description:
 Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

Description:	Start Date:	Due Date:	Weight:	Progress:
Develop report template and present to unit leader for approval. This includes identifying pertinent data to be reported on.	11/1/2017	12/31/2017	10%	100
Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	1/1/2018	12/31/2018	70%	50

Show All (3)

Attachments

[Choose File](#)

Upload up to 3 attachments. Maximum upload 1mb

Comments

Bob Lee commented 10/20/2017 3:21 PM
Things are going well; however, if we don't get additional resource, may miss important due date.

[Add Comment](#) [Close](#)

Once you have expanded the goal, you can choose from the dropdown menu (also located in the far right) to:

ENTER PROGRESS

Enter goal progress as a percentage. If one or more tasks have been assigned to the goal, you will enter progress for each task. If not, you will enter progress above the Description field. The goal progress determines the status of the goal, including status of goal color indicator as described above.

NOTE: The TOTAL COMPLETE dial on your MY GOALS page is an indication of the progress toward your goals and is calculated using the weight of each goal, if any, and the progress of each goal during the current check-in period.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.



ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) per goal.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

ADD A COMMENT

Comments are helpful for entering project updates, e.g., changes in scope, changes in deliverables, status updates, feedback from meetings, notes on additional resources needed, etc. Comments can be viewed in your quarterly check-in summary, as well.

NOTE TO MEDICAL CENTER EMPLOYEES

All medical center employees must enter their three (3) CEMRP goals, in addition to any other goals. At this time, it is recommended that medical center employees copy their CEMRP goals from the HR Connect system and paste them into the ACHIEVEonline system to minimize duplication of work/effort.

In addition to your CEMRP goals, you should have at least one to five other performance goals.

GOALS MARKED WITH AN ASTERISK

Any goal marked with an asterisk indicates that the goal has been cascaded down (assigned) by your manager. This means your manager owns the goal and your goal actions are limited. In terms of goal actions, you are only able to copy and view history for this goal.

A screenshot of a goal management interface showing four goal entries. Each entry includes a progress percentage, a goal title, status, due date, goal type, and weight. Two goals are marked with an asterisk, indicating they are cascaded. Red arrows point to these asterisked goals.

0%	Earn professional certification	Status: Not Started	Due Date: 12/31/2017	Goal Type: Performance Goal	Weight: 0%	>
50%	* Engagement Plan	Status: On Track	Due Date: 12/31/2017	Goal Type: Performance Goal	Weight: 0%	>
0%	New Goal	Status: Not Started	Due Date: 10/24/2017	Goal Type: Performance Goal	Weight: 50%	>
10%	* Update technology documentation each month	Status: Not Started	Due Date: 12/31/2017	Goal Type: Performance Goal	Weight: 0%	>

MORE ABOUT CASCADING OF GOALS

Some of your goals may be goals directly related to higher level organizational goals, as defined by your manager. In these cases, your manager may elect to “cascade” goals down to you and/or other employees on your team. Cascaded goals are linked to both you and your manager. Cascading goals allows your manager to ensure alignment between the organization’s objectives and your goals and activities, directly relating your efforts towards the common goals of your unit and/or UCI.

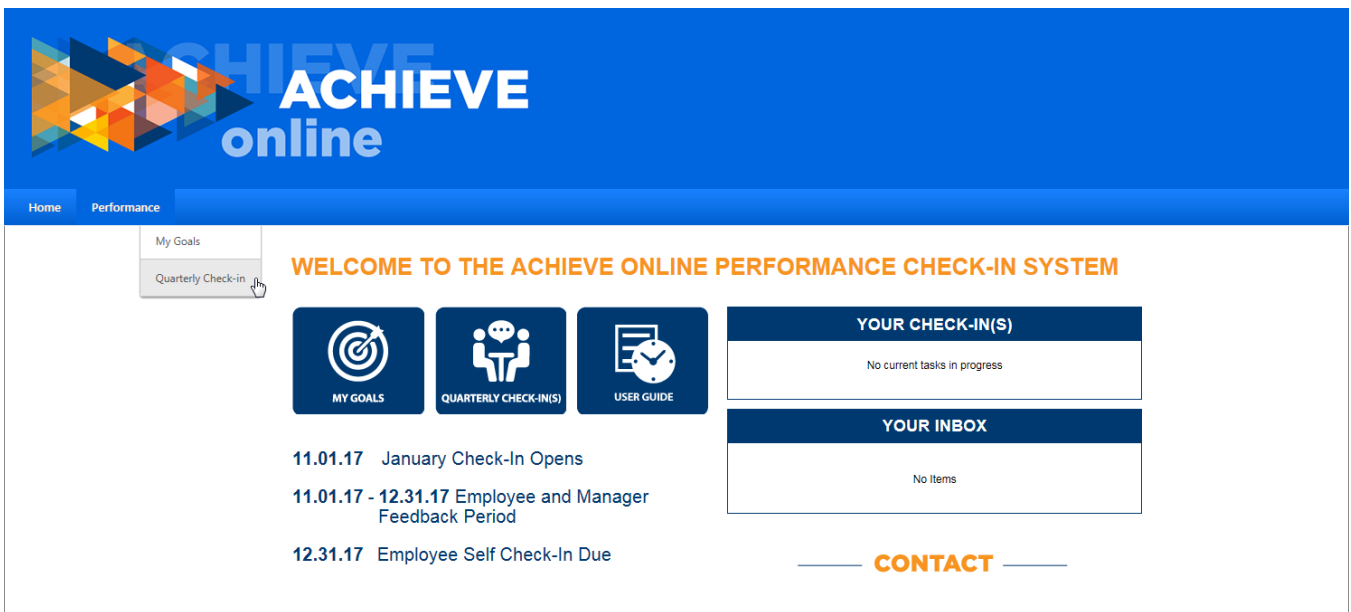


PRINTING FROM THE SYSTEM

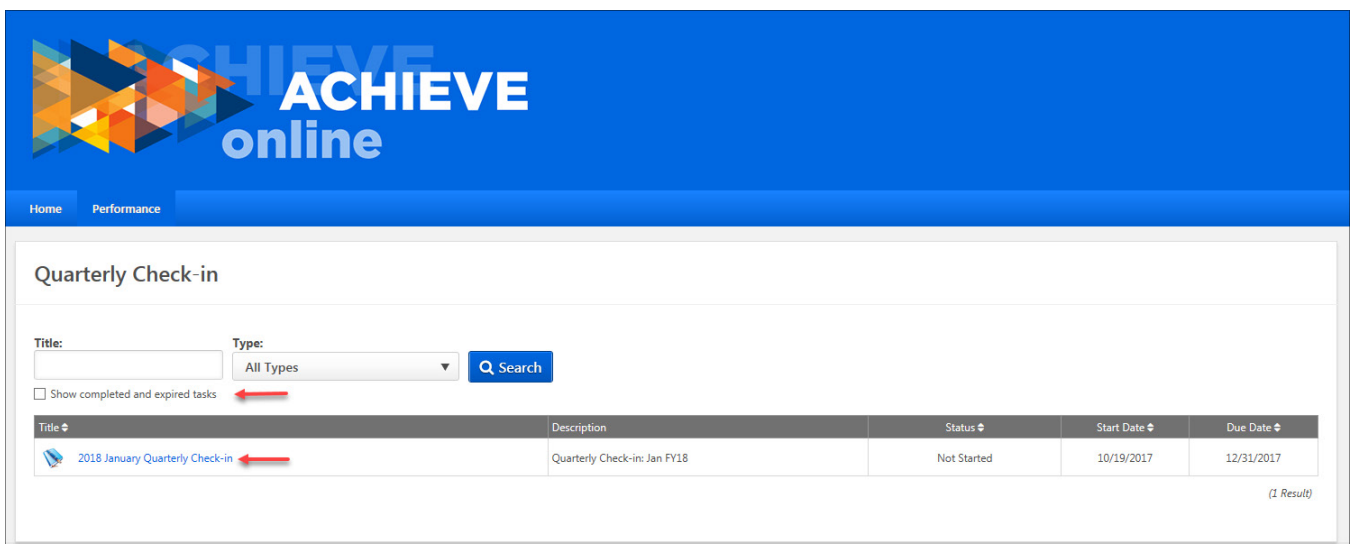
If you would like to print your goals, go to the **OPTIONS** button in the upper right corner of the **MY GOALS** page and choose the **DOWNLOAD PDF – MY GOALS** option. This will convert your information to a PDF that you can then save and/or print.

QUARTERLY CHECK-INS

From the navigation bar at the top of your screen, select **PERFORMANCE/QUARTERLY CHECK-IN**.



You will see the Quarterly Check-In landing page. Your currently assigned check-in(s) will be displayed on this page.



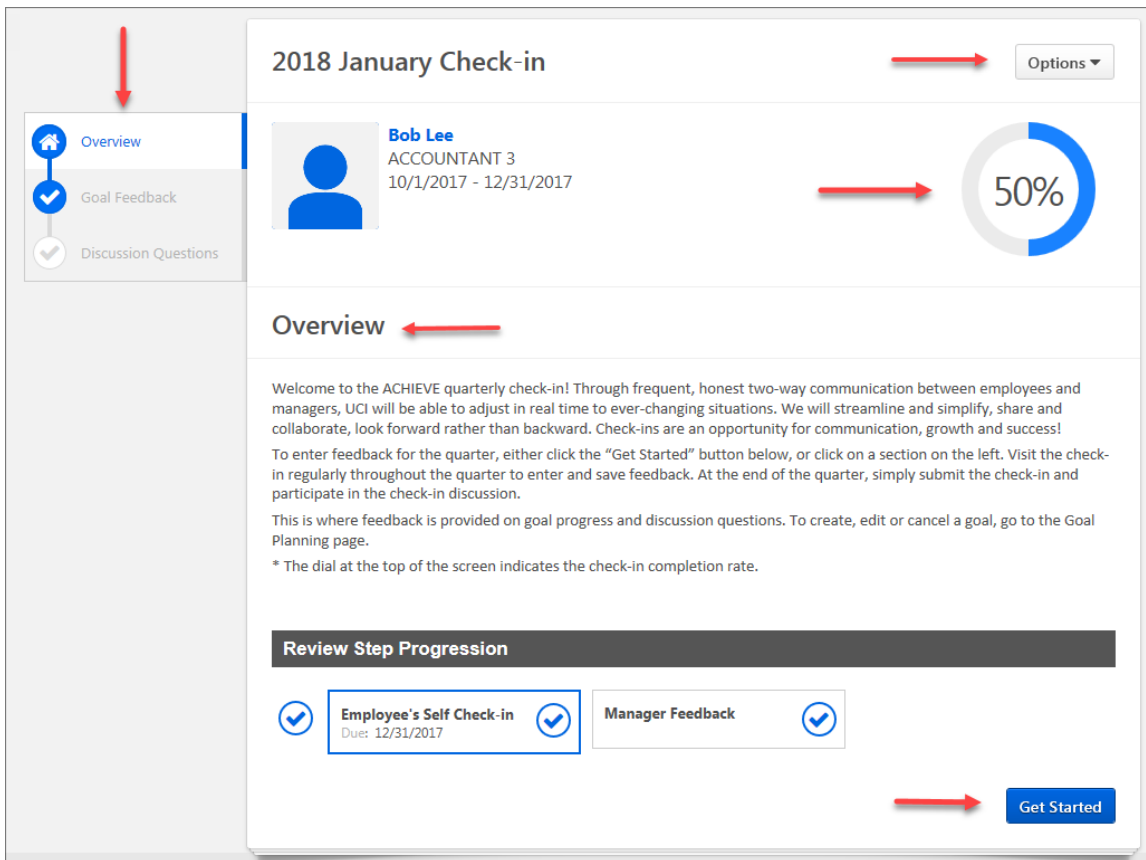


If you want to view prior check-ins, click on SHOW COMPLETED AND EXPIRED TASKS. You may want to reference a previously completed check-in to copy and paste information, review a task(s), etc.

NOTE REGARDING THE SEARCH FUNCTION

The SEARCH function on the QUARTERLY CHECK-IN page is not operable at this time. Our vendor cannot remove the search boxes at this time. We are working to either have the function removed or implement the SEARCH function at a later date. Thank you for your understanding.

Normally you, as an employee, will only see one check-in at a time. To provide your feedback for your quarterly check-in, click on the quarterly check-in title in your assigned check-ins section. This will open your quarterly check-in.



At the top you will see your name, title, date range of the quarterly check-in, photo (if you have uploaded one), and a percent gauge. This percent gauge shows you percent completed on the check-in form only.

NOTE: Please note the percent gauge will display 50% if you click to any section on the form whether or not you have added any information. This is a function of the application and we have asked the vendor to modify this function to accurately represent form completion or remove the function entirely.



When you first bring up the QUARTERLY CHECK-IN page, please read the OVERVIEW. This will provide you with important information regarding the check-in process.

OPTIONS BUTTON

From the OPTIONS button in the upper right of your screen, you can:

ATTACH DOCUMENTS

You can attach up to three documents (up to 1 MB each) to the check-in.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

There are two steps to completing the check-in form.

PRINT CHECK-IN

NOTE: The term PRINT REVIEW should read PRINT CHECK-IN, however, the vendor is unable to re-configure this selection title at this time. Thank you for your understanding.

First, you complete and submit your self check-in.

Second, your manager completes and submits your check-in.

COMPLETING YOUR SELF CHECK-IN

Click the GET STARTED button or choose a section to complete using the navigation menu on the left.

In the left navigation there are two sections:

NOTE: The term Review Step Progression at the bottom of the Check-in Overview page should read Check-in Step Progression. However, the vendor is unable to reconfigure this selection title at this time. Thank you for your understanding.

GOAL FEEDBACK

Use this section to input the progress you have made on each goal.



A screenshot of the ACHIEVEonline interface showing a goal titled "Analyze Budget Activity". On the left is a navigation menu with "Overview", "Goal Feedback", and "Discussion Questions". The goal description reads: "Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of analysis and either continue or discontinue." Below the description, it shows "Progress: 45%" with a green bar, "Status: On Track", "Start Date: 11/1/2017", and "Due Date: 1/31/2019". A "Comments" section contains a rich text editor with a toolbar and a text box that says "Use this space to enter feedback on this goal." with a red arrow pointing to it.

DISCUSSION QUESTIONS

Use this section to input your answers to the four required check-in discussion question boxes.

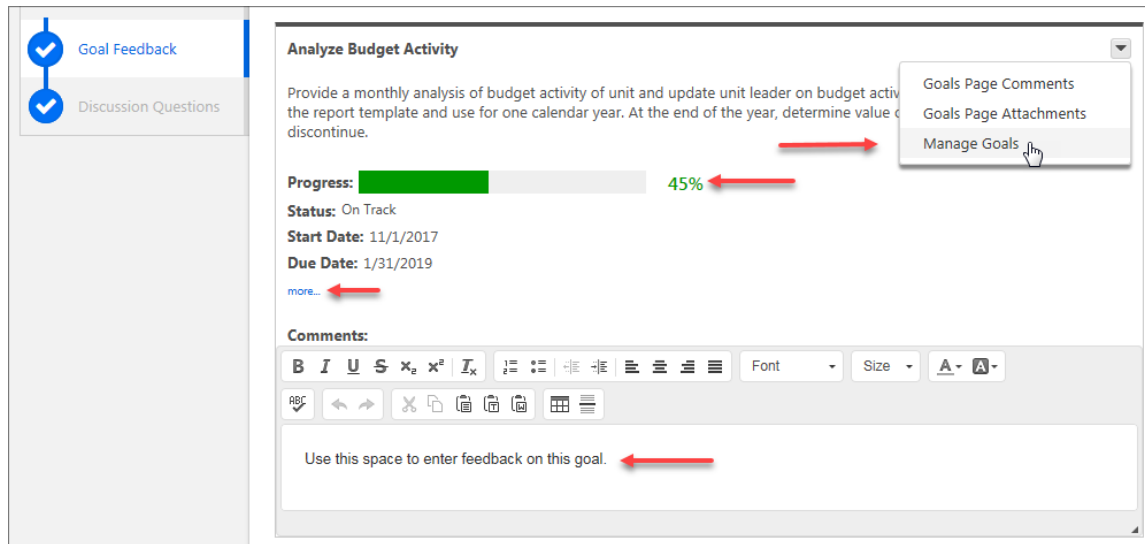
A screenshot of the "Discussion Questions" page in ACHIEVEonline. The navigation menu on the left has "Discussion Questions" selected. The main content area includes instructions: "Please provide feedback to each discussion question below. Remember the following:" followed by a bulleted list of guidelines. It also provides links for "Merit Criteria Guide for Individual Contributors" and "Merit Criteria Guide for People Managers". A note states: "* The dial at the top of the screen indicates the check-in completion rate." Below this is a specific question: "What are you most proud of and what additional accomplishments have you achieved in this check-in period?" followed by a rich text editor and a text box with the instruction "This is where you will enter feedback to discussion questions." and a red arrow pointing to it.

You should be going in and out of your quarterly check-in on a regular, ongoing basis rather than waiting to provide feedback and answer questions in a single session. Using the ACHIEVEonline application on a regular basis means that you will be ready to submit your check-in form on-time and without spending a lot of time close to the check-in due date.

MORE ON GOAL FEEDBACK

There are two important functions you will perform in this section:

1. Input progress (as a percent of completion) you have made on each goal.
2. Enter feedback on each goal.



As a reminder, to add, edit or cancel a goal, you will need to use the MY GOALS page.

You will see a progress bar near the top of each goal section. The color used in the bar corresponds to the colors used for the status indication in the MY GOALS section. To update your progress on a goal, use the MANAGE GOALS option in the upper right dropdown menu. As a reminder, the colors represent the following:

- DRAFT - indicated by the color black
- PENDING - submitted to manager, pending (awaiting) approval; indicated by the color beige
- NOT STARTED - indicated by the color gray
- ON TRACK - indicated by the color green
- BEHIND - indicated by the color yellow
- COMPLETED - indicated by the color blue
- CANCELLED - indicated by the color green (NOTE: Green is also used for goals that are on track. The system considers a cancelled goal to be on track since you, as the user, have set the cancelled status.)

Use the SHOW MORE button to show milestones (aka tasks) you have previously entered for a goal.

Use the dropdown menu in the upper right of each goal summary to enter and/or view:

GOALS PAGE COMMENTS

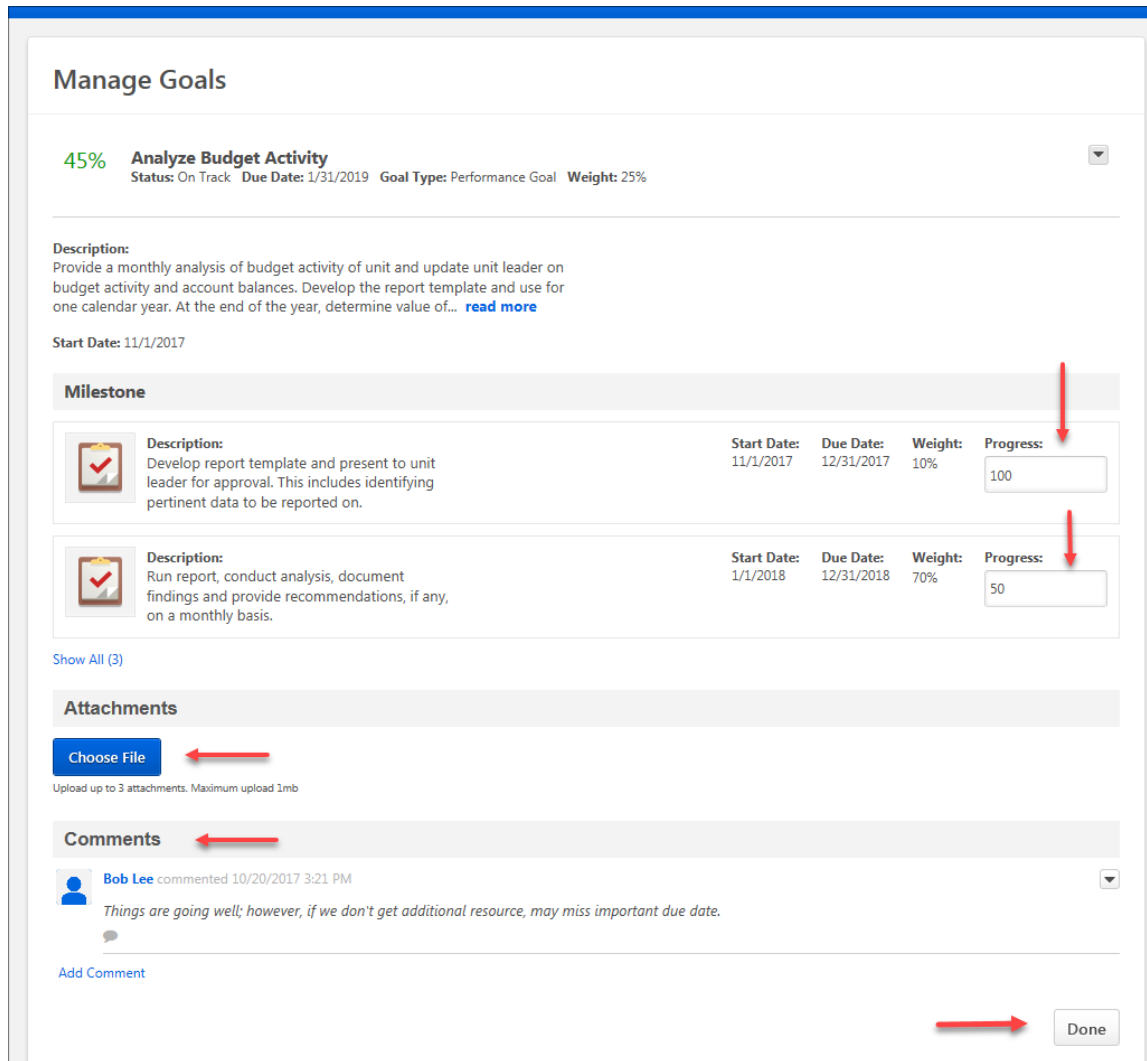
You can view any comments you or your manager previously entered on your MY GOALS page.

GOALS PAGE ATTACHMENTS

You can view any attachments you or your manager previously entered on your MY GOALS page.

MANAGE YOUR GOALS

This is where you will enter your progress towards goals (in terms of percent completed.) In addition, you can attach documents (files), and add a comment. Using this section for these three functions saves you from having to go back to the MY GOALS page.





Manage Goals

45% **Analyze Budget Activity** ▼
 Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

Description:
 Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

Description:	Start Date:	Due Date:	Weight:	Progress:
 Develop report template and present to unit leader for approval. This includes identifying pertinent data to be reported on.	11/1/2017	12/31/2017	10%	100
 Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	1/1/2018	12/31/2018	70%	50


[Show All \(3\)](#)

Attachments

[Choose File](#)

Upload up to 3 attachments. Maximum upload 1mb

Comments

 **Bob Lee** commented 10/20/2017 3:21 PM
 Things are going well; however, if we don't get additional resource, may miss important due date.

[Add Comment](#)

[Done](#)

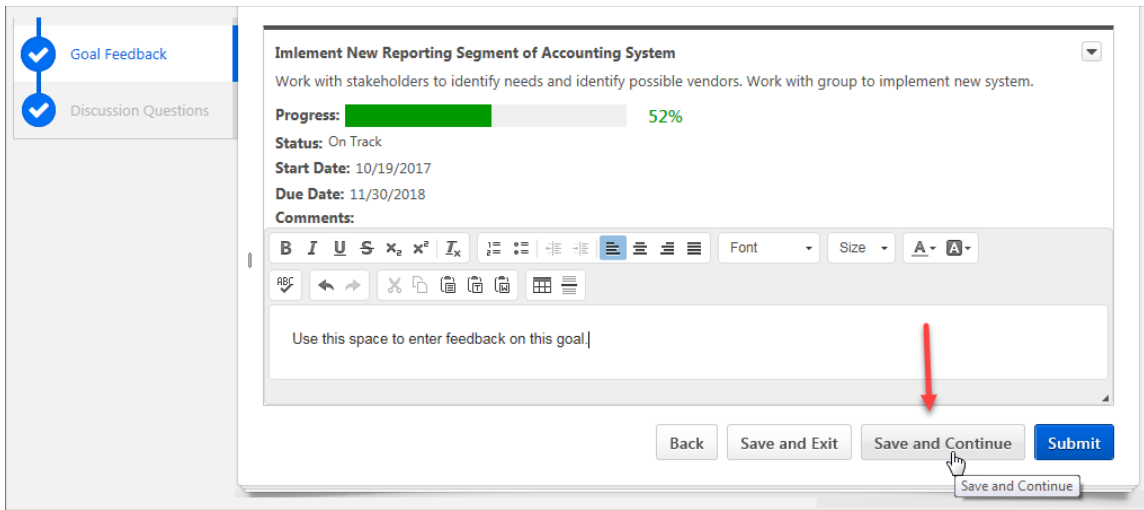
You must enter feedback on every goal. If you do not have anything to report, simply put N/A or something similar in the COMMENTS field.

When you have finished defining progress toward goals and entering any comments, click the DONE button.

When you have finished entering goal feedback, choose one of the following actions:

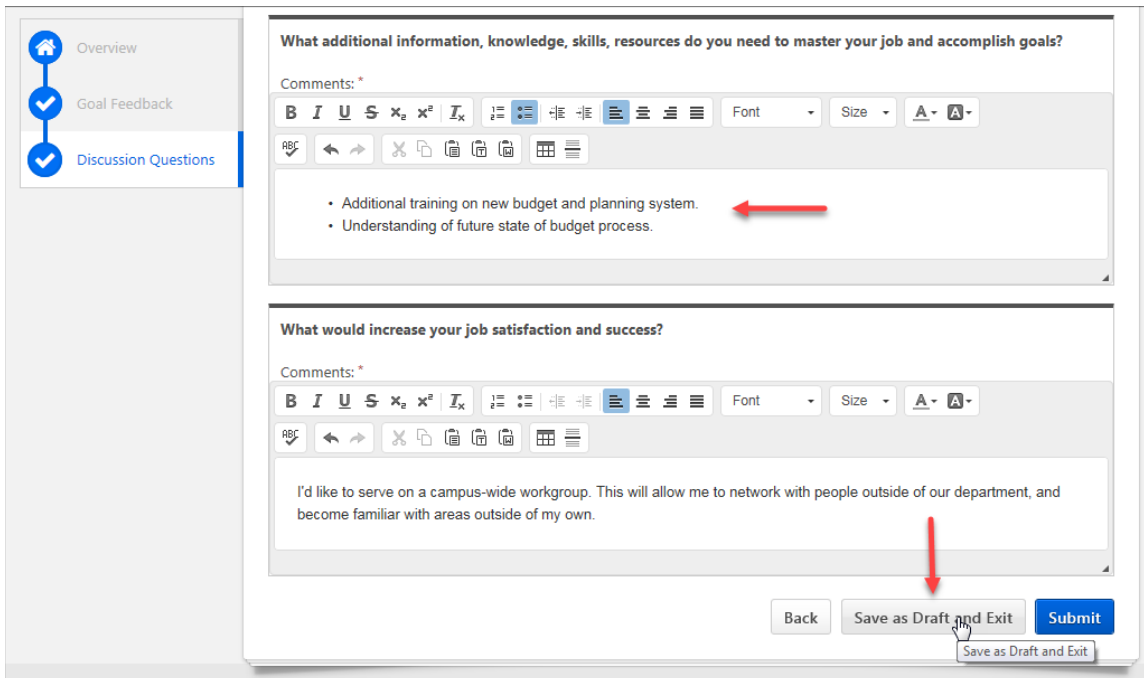


SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page
SUBMIT; this option will appear if you have entered comments for all goals, and you have entered feedback for all four discussion questions; you should choose the SUBMIT function only when you are ready for your manager to review your check-in [used semicolons to stay consistent throughout document]



DISCUSSION QUESTIONS

Use the comment fields to enter your feedback on each of the four required discussion questions.





When you have finished entering your feedback on each discussion question, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
SUBMIT; this option will appear if you have entered comments for all goals, and you have entered feedback for all four discussion questions; you should choose the SUBMIT function only when you are ready for your manager to review your check-in.

NOTE: Once you click SUBMIT, you will be returned to your QUARTERLY CHECK-IN page. To return to your MY GOALS PAGE, choose PERFORMANCE/MY GOALS.

AFTER YOU SUBMIT YOUR CHECK-IN

Once you have submitted your check-in, no further action is needed. However, if you wish to go back in and modify your answers to your discussion question, you may do so until your in-person quarterly check-in discussion date with your manager or until the quarterly check-in closes. See the WELCOME page for close date.

TO RECALL A SUBMITTED CHECK-IN

If you need to recall your submission, go to PERFORMANCE/QUARTERLY CHECK-IN. You will see your QUARTERLY CHECK-IN page. You will not see the submitted check-in. To view the check-in you submitted, click the SHOW COMPLETED AND EXPIRED TASKS button. Previously submitted and/or completed check-ins will appear.

A screenshot of the "Quarterly Check-in" search interface. At the top, the title "Quarterly Check-in" is displayed. Below it, there is a search form with a "Title:" label and an empty text input field. A red arrow points to this input field. To the right of the input field is a "Type:" dropdown menu currently set to "All Types". Further right is a blue "Search" button with a magnifying glass icon. Below the search form is a checkbox labeled "Show completed and expired tasks" which is currently unchecked. Below the checkbox is a dark grey bar with the word "Title" and a small arrow icon. At the bottom of the screenshot, there is a red text message: "Once a check-in is submitted, it will no longer appear on this screen. You must click the Show completed and expired tasks button above."

Click on the check-in you want to edit. You will see a warning message stating CHANGES NEED TO BE SUBMITTED TO BE FINALIZED. This is a reminder to click SUBMIT after you make your edits. Now you can make your edits, then choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
SUBMIT; remember – you must choose submit to ensure your changes are included in the version your manager is reviewing.

TO REVIEW A PREVIOUSLY SUBMITTED CHECK-IN

To view a check-in you have previously submitted (including from a previous quarter), click the SHOW COMPLETED AND EXPIRED TASKS button.



Show completed and expired tasks

Title	Description	Status
2018 January Quarterly Check-in	Quarterly Check-in: Jan FY18	Completed

USER GUIDE FOR MANAGERS

Use this information to assist you in completing your employees' check-ins.

As a manager, your login gives you access to information that is not available under a general employee login.

Once you login, you will be taken to your WELCOME page.

WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM

Home Performance Reports

MY GOALS

QUARTERLY CHECK-IN(S)

USER GUIDE

11.01.17 January Check-In Opens

11.01.17 - 12.31.17 Employee and Manager Feedback Period

12.31.17 Employee Self Check-In Due

12.13.17 - 01.31.18 Manager Completes Check-In; Employee and Manager Discussion Period

01.31.18 January Check-In Closes

YOUR CHECK-IN(S)

	Due Date
Complete January Manager Feedback of Bob Lee	1/31/2018
Complete January Manager Feedback of Jasmine Orlando	1/31/2018
2018 January Quarterly Check-in	12/31/2017

YOUR INBOX

[Approve Goals](#)
(Your employees have 3 Goals pending approval)

CONTACT

In the main navigation, there are three tab options available to you:

- HOME
- PERFORMANCE
- REPORTS



In the upper right hand corner of your screen, there is a HELP button that features a robust database of useful information.

WELCOME PAGE

The WELCOME page is your main page and includes quick links to all the important functions of the ACHIEVEonline system:

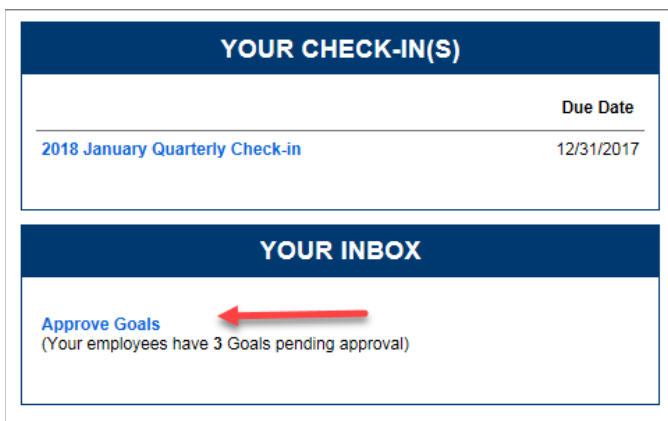
MY GOALS
QUARTERLY CHECK-IN
USER GUIDE
YOUR CHECK-IN(S)
YOUR INBOX

Return to the WELCOME page any time you need to get your bearings.

In the YOUR CHECK-IN(S) box, you will see a summary of your own check-ins as well as check-ins for all employees who report to you.

NOTE: Your CHECK-IN(S) box displays a maximum of three (3) check-ins. To see all assigned check-ins, click YOUR CHECK-IN(S) on the header of the box.

In the YOUR INBOX, you will see a summary of all goal approval requests submitted to you by your employees.



It is important that as a manager, you check this page regularly since it is the only way for you to know if an employee has created, edited, or cancelled a goal. No email notifications will be sent to you from this system.

One of the first and most common tasks you will complete in the system is to review your INBOX, address INBOX items, and clear your INBOX.

If your employees have submitted goals for your approval, you will see a message that reads: APPROVE GOALS. Click on APPROVE GOALS and you will be taken to the PENDING GOALS page.

On the PENDING GOALS page you will see a summary of all submitted goals.



Pending Goals
 You may individually view the details of each Goals to approve or deny the Goals or you may select a group of Goals to approve or deny all at once.

Check / Uncheck All Include Goals for inactive users

Select	User	Title	Status	Options
<input type="checkbox"/>	Bob Lee	New Goal	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Jasmine Orlando	Document, track and drive performance	Pending Modification Approval	Approve/Deny

If you do not need to review a goal prior to APPROVING or DENYING the goal, simply check the box to the left of the employee name and then click APPROVE or DENY at the bottom of the section. Once you do this, the goal will be removed from your INBOX summary.

To review a goal, click the APPROVE/DENY link to the far right of the pending goal you wish to review. You will be taken to an EDIT GOALS page where you can review, edit and approve or deny the goal.

If you click APPROVE, the goal is removed from the PENDING GOALS summary.

If you click DENY, you will see a COMMENTS field where you can explain why the goal was denied.

The user will see the DENIED status on their MY GOALS page. In addition, the employee will be able to read the comment(s) you have entered.

Once you DENY an employee’s goal, that goal is also removed from the PENDING GOALS summary.

If you want to review a goal that you have previously either APPROVED or DENIED, you can see these goals by going to PERFORMANCE/MY GOALS. Click the TEAM GOALS tab, locate the employee, and click the arrow/carrot on the far right to expand the view to all goals. This will show you a full summary of all goals for the employee you have selected.

TEAM GOALS

Access TEAM GOALS by going to PERFORMANCE/MY GOALS and selecting the TEAM GOALS tab. Once in this section, you can view, edit, change start and end dates, copy, view history, etc. The set of functions you can perform on the employee goal is the same set of functions the employee can perform on the same goal. You cannot, however, APPROVE or DENY a goal in this section.



Performance Reports

My Goals Quarterly Check-in

Goals Team Goals

Team Goals

Create Options

My Goals Team Goals

Current Period 10/1/2017 12/31/2017 Search

Display Canceled Hide Completed

All Statuses

Bob Lee
ACCOUNTANT 3
47% Complete Total Weight: 150%

Jasmine Orlando
ACCOUNTANT 3
39% Complete Total Weight: 100%

All Statuses

Bob Lee
ACCOUNTANT 3
40% Complete Total Weight: 150%

- 45% **Analyze Budget Activity**
Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%
- 100% **Develop New Financial Reporting Policy for Contracts and Grants**
Status: Completed Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 50%
- 0% **Document, track and drive performance**
Status: Not Started Due Date: 10/20/2017 Goal Type: Performance Goal Weight: 25%
- 0% **Earn professional certification**
Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%
- 50% *** Engagement Plan**
Status: On Track Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%
- 0% **New Goal**
Status: Pending Modification Approval Due Date: 10/24/2017 Goal Type: Performance Goal Weight: 50%
- 10% *** Update technology documentation each month**
Status: Not Started Due Date: 12/31/2017 Goal Type: Performance Goal Weight: 0%

Jasmine Orlando
ACCOUNTANT 3
51% Complete Total Weight: 100%



45% **Analyze Budget Activity**
Status: On Track Due Date: 1/31/2019 Goal Type: Performance Goal Weight: 25%

Description:
Provide a monthly analysis of budget activity of unit and update unit leader on budget activity and account balances. Develop the report template and use for one calendar year. At the end of the year, determine value of... [read more](#)

Start Date: 11/1/2017

Milestone

Description:	Start Date:	Due Date:	Weight:	Progress:
Develop report template and present to unit leader for approval. This includes identifying pertinent data to... read more	11/1/2017	12/31/2017	10%	100
Run report, conduct analysis, document findings and provide recommendations, if any, on a monthly basis.	1/1/2018	12/31/2018	70%	50

[Show All \(3\)](#)

Attachments

[Choose File](#)

Upload up to 3 attachments. Maximum upload 1mb

Comments

Bob Lee commented 10/20/2017 3:21 PM
Things are going well; however, if we don't get additional resource, may miss important due date.

[Add Comment](#)

[Close](#)

When you have finished completing all actions you wish to perform on a goal, click SUBMIT, and the changes you have applied will be available to your employee(s) from their MY GOALS page. While there is no specific email notice sent to an employee telling them that you have modified a goal, if they notice a change in a goal they can click VIEW HISTORY from the dropdown available for each goal on the far right of the specific goal section, and read what has changed with a goal and who made the change.

We highly suggest that you personally notify an employee of any major changes you make to their goals. This encourages ongoing, casual, in-person communication between you and your employee(s).

In addition to modifying employee goals from the MY GOALS page, you can also monitor progress and/or create a new goal for the employee.

In addition to reviewing, APPROVING or DENYING employee goals, you can also:



VIEW GOALS by time period by setting period start and end dates
DISPLAY CANCELLED GOALS
HIDE COMPLETED GOALS
SEARCH BY STATUS
CREATE A GOAL (for an employee), including CASCADING GOALS

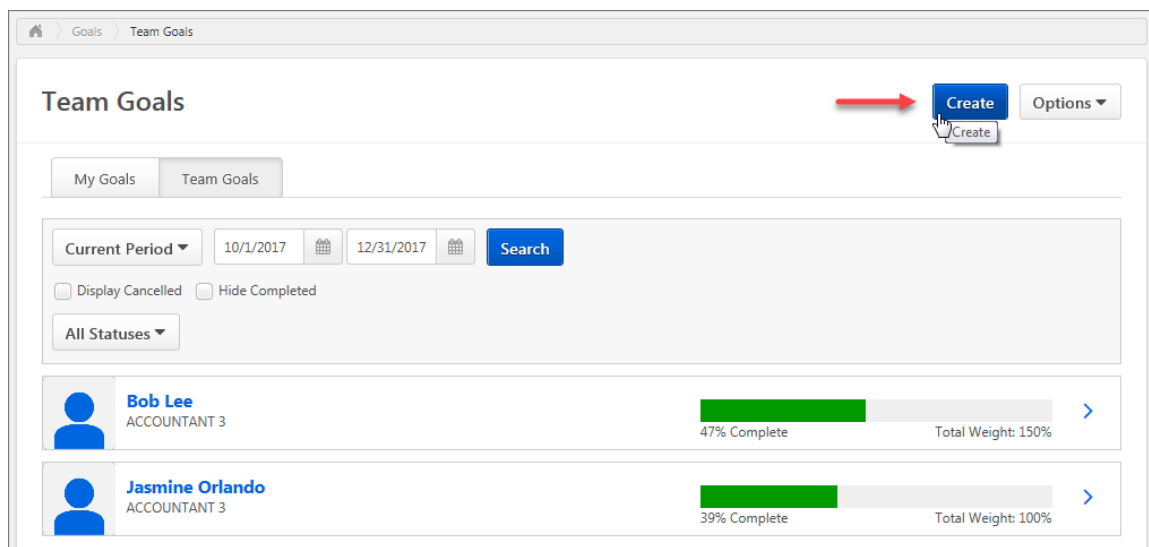
CASCADING GOALS

A cascaded goal impacts the manager's progress. When you cascade a goal to an employee, the employee's progress toward that goal affects your progress towards that goal. If you have multiple employees working on the same cascaded goal, progress by all of the employees assigned to that goal contribute to the overall progress.

CREATE TEAM GOALS

In this section, you can create goals and cascade them to your team. To create and cascade a goal:

1. Click the CREATE button.
2. Enter a title.
3. Enter start and end date.
4. Enter weight (Remember – weight is required by the system but optional in terms of UCI process at this time. You may choose to use the weighting function or not. If you do not want to use the weighting function, enter a value of 0 (zero.) A value must be entered before you can move on in the system).
5. Select goal type.
6. Add milestones, if desired.
7. Add attachments, if desired.



You will then be given the choice of creating this goal for yourself or your team. If you are creating the goal for your team, click the YOUR TEAM radio button. A list of your employees will come up on the page. Select which employee(s) you are assigning the goal to by checking the select box to the left of the employee's name.



Start Date 10/23/2017 **Due Date *** 12/31/2017 **Weight *** 0

Goal Type *
Performance Goal

Milestone
Add Milestone

Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb

Assignment *
 Yourself Your team

<input checked="" type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input checked="" type="checkbox"/>	Liz Jones	DIR	
<input checked="" type="checkbox"/>	Bob Lee	ACCOUNTANT 3	
<input checked="" type="checkbox"/>	Jasmine Orlando	ACCOUNTANT 3	

Options
 Create a separate goal for each user.
 All users will share this goal and its progress.

Managed By *
Liz Jones

Cancel Save as Draft Submit

You may also assign the goal to indirect report(s), or ask your employee to assign the goal to their direct report(s).

In the OPTIONS section at the bottom of the ASSIGNMENT section, you must choose either:
CREATE A SEPARATE GOAL FOR EACH USER
ALL USERS WILL SHARE THIS GOAL AND ITS PROGRESS (CASCADED GOAL)

If you choose to create separate goals, each employee will manage the goal assigned to them and that goal will not be connected to you or another employee in any way.

If you choose to create a cascaded (shared) goal, progress towards completion of the cascaded goal is affected by the progress of each individual employee assigned to that goal. In addition, if you elect to cascade (share) a goal, you will be required to assign a manager to that goal in the MANAGED BY field. You may decide to manage the goal yourself or you may want someone else with whom you have shared the goal to manage the goal. You may not assign a manager who is not already sharing the goal. Whomever manages the goal is responsible for editing and updating the goal progress.

If you elect to share a cascaded goal, progress made by employees toward this goal factors into the percent representation calculation that is reflected in the GOAL PROGRESS dial on your MY GOALS page.



Also, if you elect to cascade a goal, employees cannot edit the goal, nor can they enter a progress weight for that goal.

A screenshot of the ACHIEVE online interface showing a goal management page. At the top, a green progress bar indicates 50% completion. The goal is titled "* Engagement Plan" and includes details: Status: On Track, Due Date: 12/31/2017, Goal Type: Performance Goal, and Weight: 0%. Below the progress bar, there is a "Progress:" label and a text input field containing the number "50". A description follows: "As a team, we will work to implement the solutions we came up from the Gallup Survey results." The start date is listed as "10/20/2017". There is an "Attachments" section with a "Choose File" button and a note: "Upload up to 3 attachments. Maximum upload 1mb". At the bottom, there is a "Comments" section with an "Add Comment" link.

Once you have assigned the goal either to an individual or to multiple people, you choose:
SAVE AS A DRAFT
SUBMIT

SAVE AS A DRAFT; allows you to save your work and come back later.

Clicking SUBMIT sends the goal to the assigned employee(s) and the goal becomes visible on each employee's MY GOALS page. Cascaded (shared) goals are designated in all MY GOALS views (manager and employee) with an asterisk.

SPECIAL NOTES FOR MANAGERS

Changes made to the MY GOALS page happen in real time, and are immediately visible to both the employee and manager once entered.

You can change the progress status of an employee's goal(s). Likewise, the employee can change the progress status of their goal. If you are disagreeing on the progress status of a goal, please meet with your employee in person to discuss and clarify the situation.

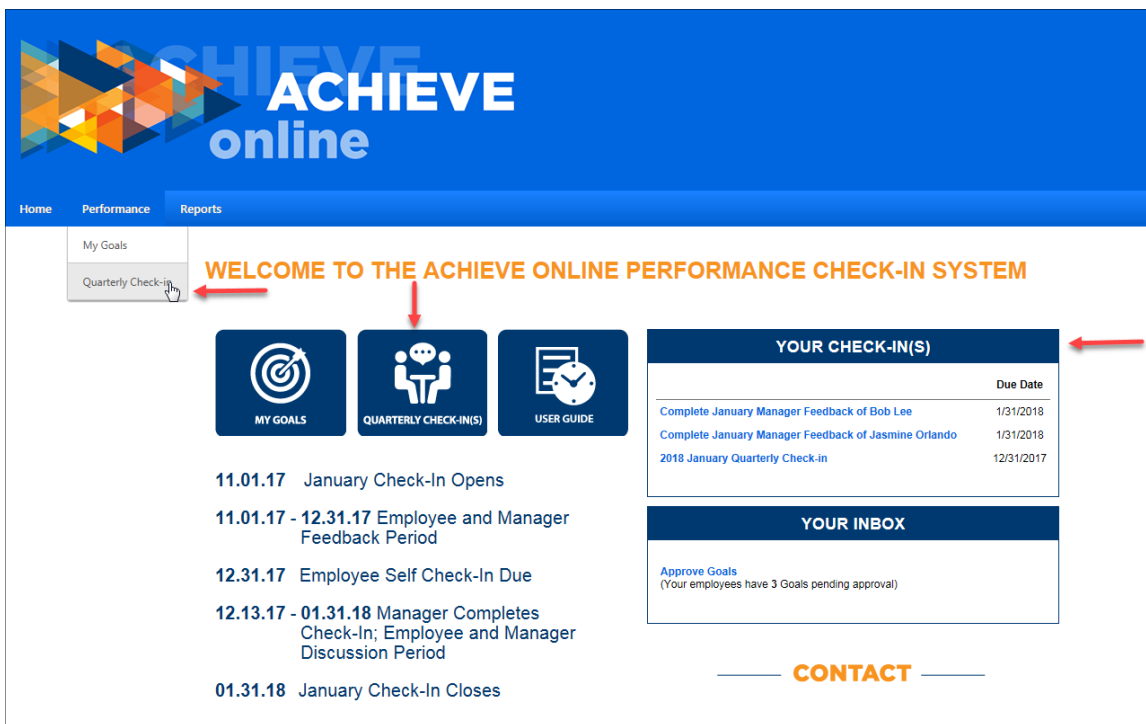


QUARTERLY CHECK-INS

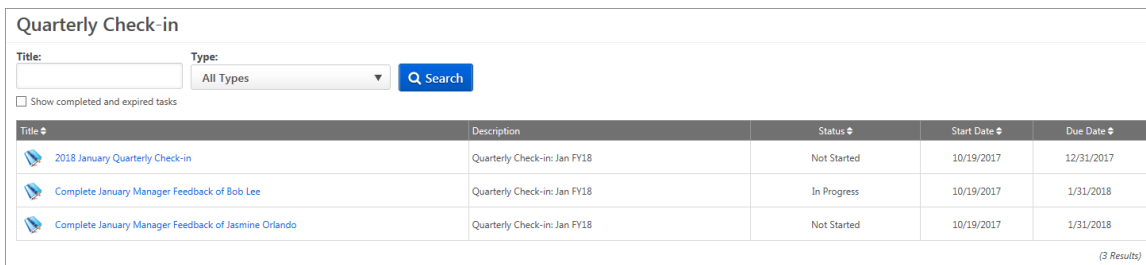
The second function that most managers will use from the WELCOME page is QUARTERLY CHECK-IN(S).

There are three (3) ways to access the QUARTERLY CHECK-IN(S) function:

- PERFORMANCE/QUARTERLY CHECK-IN TAB
- QUARTERLY CHECK-IN(S) BUTTON
- YOUR CHECK-IN(S) BOX



By clicking on either the QUARTERLY CHECK-INS button or any check-in title visible in the YOUR CHECK-INS box, you will automatically be taken to your QUARTERLY CHECK-IN page.



If you use the PERFORMANCE tab, select QUARTERLY CHECK-IN from the dropdown menu and you will be taken to your QUARTERLY CHECK-IN page.



NOTE REGARDING THE SEARCH FUNCTION

The SEARCH function on the QUARTERLY CHECK-IN page is not operable at this time. Our vendor cannot remove the search boxes at this time. We are working to either have the function removed or implement the SEARCH function at a later date. Thank you for your understanding.

Once on the QUARTERLY CHECK-IN page, you can select either your own quarterly check-in or one of your employee's check-ins.

To access the list of all check-ins (including previously completed), click the SHOW COMPLETED AND EXPIRED TASKS checkbox. A list of all check-ins will appear.

You will have access only to your direct reports. If you have employees who have direct reports of their own, you will not see your employee's direct reports check-ins on your page.

Use the QUARTERLY CHECK-IN page to view the status of each employee's check-in, including Not Started, In Progress and Completed.

REMEMBER – if you are completing an employee check-in, you are giving the employee feedback on their goals, and you are responsible for answering question number 5 that applies to managers only. If you are completing the check-in as an employee, you will answer questions one (1) through four (4). Your manager will answer question 5. Employees do not see question 5 in their check-in. Only managers see question 5.

COMPLETING EMPLOYEE CHECK-IN(S)

First, click on an employee check-in to complete. The employee-specific quarterly check-in page will appear, showing employee name, title and check-in period dates.

The screenshot shows a web interface for a "2018 January Check-in". On the left is a navigation sidebar with five items: "Overview" (selected), "Goal Feedback", "Discussion Questions", "Manager Discussion Q...", and "Manager-Employee Ch...". The main content area has a header "2018 January Check-in" with an "Options" dropdown. Below the header is a profile card for "Bob Lee", ACCOUNTANT 3, with dates "10/1/2017 - 12/31/2017". To the right of the profile is a circular progress indicator showing "25%". Below the profile is an "Overview" section with a welcome message and instructions. At the bottom, there is a "Review Step Progression" bar with three steps: "Employee's Self Check-in" (checked), "Manager Feedback" (checked, due 1/31/2018), and "Get Started" (button).



On this page you will see a progress dial. This dial indicates percent completed on the check-in you are working on only.

Next, either click the GET STARTED button or choose a check-in section to complete using the navigation menu on the left.

In the left navigation, there are four sections:

GOAL FEEDBACK

Use this section to input feedback on the employee's progress towards each goal.

DISCUSSION QUESTIONS

Use this section to input your responses to the four required check-in discussion questions. You should be going in and out of your employee's quarterly check-in on a regular, ongoing basis rather than waiting to provide feedback and answer questions in a single session. Using the ACHIEVEonline application on a regular basis means that you will be ready to submit the check-in form on-time and without spending a lot of time close to the check-in due date.

MANAGER DISCUSSION QUESTION

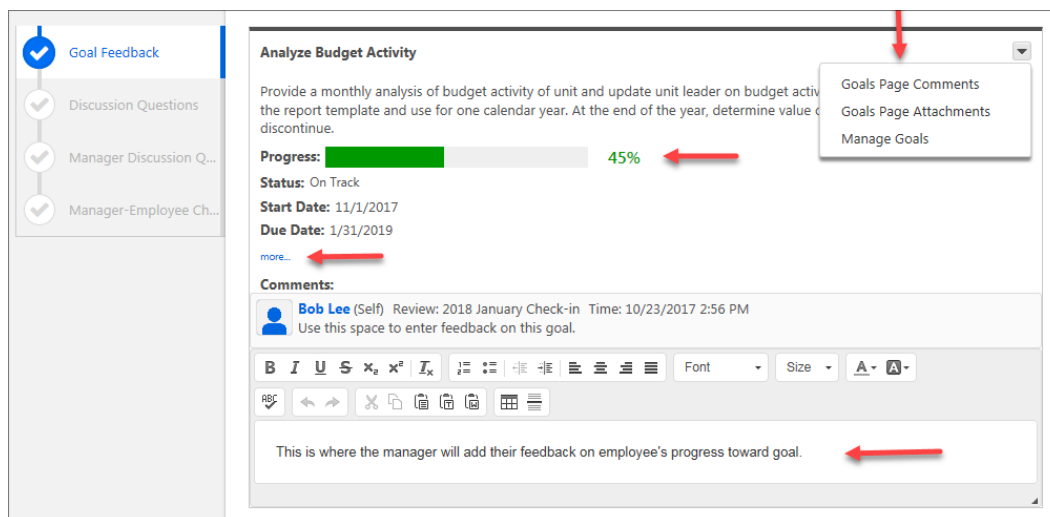
This takes you directly to question 5 in the check-in. Question 5 is for managers only.

MANAGER EMPLOYEE CHECK-IN DATE

Clicking on this choice takes you to the MANAGER EMPLOYEE CHECK-IN DATE, where you can enter the date of the in-person quarterly check-in discussion.

MORE ON GOAL FEEDBACK

The most important function you will complete on this page is entering comments, regarding the employee's goal(s). This is your feedback to your employee.





While on this page, you can also view comments, attachments and /or modify goal progress and/or comments.

You will see a progress bar near the top of each goal section. The color used in the bar corresponds to the colors used for the status indication in the MY GOALS section. To update the progress of a goal, use the MANAGE GOALS option in the upper right dropdown menu. As a reminder, the colors represent the following:

- DRAFT - indicated by the color black
- PENDING - submitted to manager, pending (awaiting) approval; indicated by the color beige
- NOT STARTED - indicated by the color gray
- ON TRACK - indicated by the color green
- BEHIND - indicated by the color yellow
- COMPLETED - indicated by the color blue
- CANCELLED - indicated by the color green (if you cancel a goal the system considers the goal as ON TRACK since you have made the decision to cancel the goal)

Use the MORE link to show milestones (aka tasks) employees have entered for a goal.

When you have finished entering your feedback (comments), and making any changes, e.g., goal progress, choose one of the following actions:

- SAVE AND EXIT; this allows you to save the work you have completed and return at a later time
- SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page
- SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

DISCUSSION QUESTIONS and MANAGER QUESTION



Use the comment fields to enter your feedback on each of the four required discussion questions, as well as manager discussion question.

When you have finished entering your feedback on each discussion question, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SAVE AND CONTINUE; this saves your work and takes you to the next page

SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

MANAGER-EMPLOYEE CHECK-IN DATE

Enter date of the in-person check-in discussion with the employee.

When you have finished entering the check-in date, choose one of the following actions:

SAVE AND EXIT; this allows you to save the work you have completed and return at a later time

SAVE AND CONTINUE; this saves your work and takes you to the DISCUSSION QUESTIONS page

SUBMIT; this option will appear only after you have completed all check-in requirements; you should choose the SUBMIT function only when you are ready to submit your check-in

A screenshot of a web application interface. On the left is a vertical navigation menu with three items: "Discussion Questions", "Manager Discussion Q...", and "Manager-Employee Ch...", each with a blue checkmark icon. The main content area is titled "Manager-Employee Check-in Date". Below the title is a text input field containing the question: "Liz Jones when did/will you and Bob Lee meet to discuss this quarterly check-in?". Below this is a date selection field labeled "Date of Check-in with the Employee" with a calendar icon and a red asterisk. The date "11/21/2017" is entered. At the bottom right of the form are three buttons: "Back", "Save and Exit", and "Submit". A mouse cursor is hovering over the "Submit" button, and a tooltip with the text "Submit" is visible below it.

NOTE: Once you click SUBMIT, you will be returned to the QUARTERLY CHECK-IN page.

PREPARING FOR THE IN-PERSON CHECK-IN (PROCESS NOTE)

As a manager, you may elect to submit your check-in input before or after you hold your in-person quarterly check-in discussion with your employee(s). If you choose to share the information you have entered before the in-person check-in, enter the date of your in-person quarterly check-in date (this is a REQUIREMENT), then click SUBMIT. The employee will then see the information you have entered. It is suggested that you print the check-in using the OPTIONS button in the upper right of your screen. Select the PRINT REVIEW from the dropdown menu.



The screenshot shows the "2018 January Check-in" form. On the left is a navigation sidebar with a home icon and a list of items: Overview, Goal Feedback, Discussion Questions, Manager Discussion Q..., and Manager-Employee Ch... (highlighted). The main content area has a header "2018 January Check-in" and an "Options" dropdown menu with a red arrow pointing to it. Below the header is a profile card for "Bob Lee", ACCOUNTANT 3, with dates 10/1/2017 - 12/31/2017. The main section is titled "Manager-Employee Check-in Date" and contains the question "Liz Jones when did/will you and Bob Lee meet to discuss this quarterly check-in?". Below this is a date picker field labeled "Date of Check-in with the Employee" with the date "11/21/2017" and a calendar icon. At the bottom right are three buttons: "Back", "Save and Exit", and "Submit" (with a red arrow pointing to it).

NOTE: Sharing the information you have entered with your employee(s) before the check-in gives your employee the chance to review and digest your feedback before the in-person discussion, thereby freeing up discussion time for talking about the most critical goals, addressing specific issues, concerns or planning for future goals and tasks.

If you, as a manager, have changes to the check-in after the in-person quarterly check-in discussion has taken place, you are allowed to make your changes. Go the PERFORMANCE tab, select QUARTERLY CHECK-IN, click the SHOW COMPLETED AND EXPIRED TASKS checkbox, and then select the check-in you wish to edit. Once the information is updated, you must click SUBMIT to re-submit the check-in.

The screenshot shows the "Quarterly Check-in" search form. It has a "Title:" text input field with a red arrow pointing to it, a "Type:" dropdown menu set to "All Types", and a "Search" button. Below the input fields is a checkbox labeled "Show completed and expired tasks" which is currently unchecked. At the bottom, there is a red text warning: "Once a check-in is submitted, it will no longer appear on this screen. You must click the Show completed and expired tasks button above."

If you elect to submit your check-in input after the in-person check-in, click SAVE AND EXIT. To help facilitate your in-person check-in discussion with your employee(s), it is suggested that you print the check-in using the OPTIONS button in the upper right of your screen. Select PRINT REVIEW or PRINT REVIEWEE from the dropdown menu. PRINT REVIEW prints a version that includes all information entered by you and your employee. PRINT REVIEWEE version prints only the information entered by the employee.



Once the in-person quarterly check-in discussion has taken place, be sure to go back into the check-in, make any necessary changes to the information, enter the date of the discussion (REQUIRED), and click SUBMIT.

NOTE: You can go back into the check-in as many times as you wish until the check-in close date.

OPTIONS BUTTON

From the OPTIONS button in the upper right of your screen, you can also:

ADD CO-PLANNERS

ATTACHMENTS

PRINT REVIEW

PRINT REVIEWEE VERSION

ADD CO-PLANNERS

A manager can assign a co-planner. Co-planners can perform check-ins, as though they are the manager. This means the co-planner can enter information into the check-in, and then save, submit and/or print the check-in for use at the in-person check-in discussion.

A manager may want to assign a co-planner if the manager is away for an extended period of time on business travel, out on leave, etc., or the manager may want to assign a co-planner if the co-planner has additional knowledge of the employee's day-to-day goals and tasks. Co-planners cannot create, assign, cascade (share), edit or cancel employee goals. The co-planner is assigned only for tasks related to the quarterly check-in.

ATTACH DOCUMENTS

You may want to attach a document related to a goal or task so that it is readily available for reference.

You can attach up to three documents (up to 1 MB each) to a check-in.

To attach a file, click CHOOSE FILE. Select the document you want to attach, then click OPEN to attach the document.

REPORTING

The third function that managers can access from the WELCOME page is REPORTING. There are two tabs under REPORTING:

STANDARD REPORTS

DASHBOARDS



Home Performance **Reports**

- Standard Reports
- Dashboards

WELCOME TO THE ACHIEVE ONLINE PERFORMANCE CHECK-IN SYSTEM

MY GOALS

QUARTERLY CHECK-INS

USER GUIDE

11.01.17 January Check-In Opens
11.01.17 - 12.31.17 Employee and Manager Feedback Period

YOUR CHECK-IN(S)	
	Due Date
Complete January Manager Feedback of Bob Lee	1/31/2018
Complete January Manager Feedback of Jasmine Orlando	1/31/2018
2018 January Quarterly Check-in	12/31/2017

YOUR INBOX

STANDARD REPORTS

The following reports are available as standard reports within the ACHIEVEonline system. For more information on these reports click HELP at the top right of the screen and the STANDARD REPORTS OVERVIEW page will appear. Then select PERFORMANCE/GOAL REPORTS or PERFORMANCE REVIEW REPORTS, and then the title of the report.

- Goal Details
- Goal Exception
- Goal Hierarchy
- Goal Progress
- Goal Status
- Goal Target
- Goal Tasks Summary
- Performance Review
- Performance Reviews Details Report
- Performance Step Status Report
- Task User Status

Home Performance **Reports**

Reports

Click on a report category to view those reports. You may search for any reports by title or description.

Performance

<p>Goal Details Displays the details of each goal during a specific period for a single user where the user is the goal owner.</p>	<p>Goal Tasks Summary Displays details of all tasks contained inside of goals for a specific user or OUs.</p>
<p>Goal Exception Displays all users who do not have approved goals within the selected time criteria.</p>	<p>Performance Review View a performance review for a single user.</p>
<p>Goal Hierarchy Displays a detailed view of the hierarchy of one or more goals for a specific user.</p>	<p>Performance Review Details Report Define a date range and print one or more performance reviews for a single user.</p>
<p>Goal Progress Displays the progress towards goal completion for a specific set of users.</p>	<p>Performance Review Distribution Search for a specific review task and optionally set user criteria to display a distribution report.</p>
<p>Goal Status Display a summary of goal statuses for a specific set of users.</p>	<p>Performance Review Step Status Report View the status of all steps in a Performance Review task.</p>
<p>Goal Target Displays the details of all targets contained inside of goals for a specified user.</p>	<p>Task User Status Displays the status of 1 or more tasks for any organizational unit</p>



VIEW DASHBOARD

The dashboard has been prepared and organized to show only reporting on the functions we are actively using as an organization at this time.

You can click on VIEW DETAILS to get more information on any report view.

QUARTERLY GOAL STATUS

Provides an overview of status of all goals for you and your employees.

QUARTERLY TASK STATUS

Provides an overview of the status of all tasks for you and your employees.

NOTE: To refresh your dashboard in real time, select the dropdown indicator that appears when your mouse is in a particular view window, e.g., QUARTERLY GOAL STATUS or QUARTERLY TASK STATUS. When the dropdown choices appear, select REFRESH.

You can also refresh and print the dashboard view using the OPTIONS dropdown in the upper right of the screen.

QUESTIONS, CONCERNS & COMMENTS

Please direct questions, concerns and comments to your Human Resources Business Partner (HRBP) or email achieveonline@uci.edu.