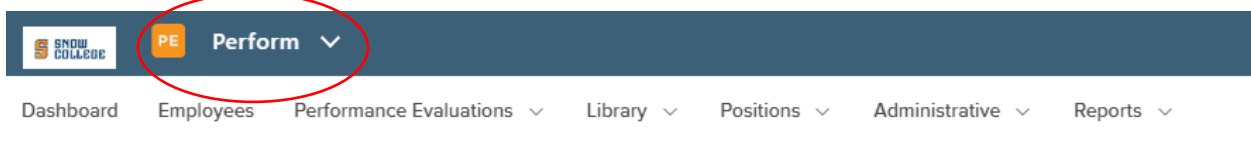


Before you begin to enter goals into NEOED Perform, it is important you understand the set permissions.

	Manager	Assignee
Set Goal Alignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create/Edit/Delete Milestone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Complete Milestone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Goal Progress	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
① Add Goal Comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Goal Comments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete Goal Comments	<input type="checkbox"/>	<input type="checkbox"/>
View Goal Activity Feed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Adding Professional and Personal Goals in NEOED Perform

Select the Perform module from the drop-down menu in NEOED.



Select the Goal Dashboard.



Select Add Goal, and then select "New Goal."



You will see a screen like this which will allow you to establish a goal.

* Fields are required.

Goal Name *

Goal Type * Employee Goal

Goal Due Date select date (MM/DD/YYYY)

Category * Select one

Assignee * Search employee Myself

Description

Add to Goal Library

ADDITIONAL SETTINGS

REMINDER SETTINGS

Goal Name: Self-explanatory.

Goal Type: Select Employee Goal.

Goal Due Date: The date by which you want to accomplish your goal. All goals with due date in the rated period are considered **Current Goals**. All goals with due dates beyond the end of the rated period are **Future Goals** and will not be rated in the current rated period. They will, however, show on your rated evaluation. When the due date falls within a rated evaluation period, they will automatically show up in your **Current Goals** and will be evaluated.

Category: Select **Individual Goal** for now, which is your personal goal you want to accomplish.

Eventually, we will establish Snow College Organizational Goals, and your department head will establish Department goals. At that point, you will be able to align some of your goals with one or both of those categories. NEOED will only allow you to align five (5) of your goals with a Department or Snow College Organizational Goal.

Assignee: Click **Myself** if you are establishing your own goal. A supervisor may assign a goal to an employee by typing their name in the **search employee** box.

Description: Explain in detail about your goal and what you would like to accomplish. At the top you will see **Milestones**. This is a subsection to your goal which will allow you to describe activities and due dates which will contribute to your goal. Milestone are explained in more detail below.

Additional Settings and Reminder Settings

ADDITIONAL SETTINGS ^

Priority Level

Medium
v

REMINDER SETTINGS ^

Reminder Notices

Off On

30 Days Before

2 Weeks Before

1 Week Before

Custom Days Before

Overdue Notices

Off On

Every Week

Every 2 Days

Every Day

Custom Every Days

Priority Level: Allows you to set the goal and low, medium, or high priority

Reminder Notices: Allows you to customize your goal reminders.

After completing all details related to your goal, the **Save** button will appear in the upper right directly across from the **Add Goal** header. Save your goal.

Milestones

As stated above, Milestones are activities and due dates which will contribute to your goal. Click on **Add New Milestone**.

You may use weights to help measure your success towards accomplishing the general goal. Activate weights by clicking on the **Use Weights** box at the top. You will not be able to do manual updates to goal progress when milestone weights are enabled. Whether or not to use the weighting is your decision. After completing the name of the activity, due date, and reminder settings, click on the **save** button.

General

Milestones
Alignment ⌵

Use weights ⌵

* Fields are required.

Name *

⚠ Field is required

Due Date

select date (MM/DD/YYYY)

Use Overdue/Reminder Settings:

Yes No

Cancel

Save

Alignment

This will allow you to be specific to which Departmental or Snow College Organization Goal your goal will align.

Editing Goals

Perform allows you to edit your goals from multiple locations. The two easiest ways are from the **Goal Dashboard** by selecting **Edit Goal** or from the **Goal Dashboard** by selecting the pencil icon in the actions column.

BRENT BAXTER | DEPARTMENTAL
Review and Update HR Policies
Due: Aug 1, 2023

Goal Progress Goal Activity Feed Print

My Goal Tasks [view all](#) >

+Add Goal Filter Search

Goal Name	Progress	Due Date	Actions
Benefits and Payroll	100%	08/02/2022	

Goal Progress

You may update goal progress three different ways: 1) With Milestones (weighted), 2) without Milestones, or 3) Unweighted Milestones.

Without Milestones: You may update goal progress by sliding the goal progress indicator. Click and hold the circle with the arrows and drag to the right or left to the appropriate number indicating percent complete; or click the **up or down arrow** to the right to adjust percentage complete. Click **submit update** to complete the action.

Comment

B i U A: [align icons] [undo] [redo] [more]

Type something

With Milestones (Weighted): The completion of milestones will automatically adjust the goal progress indicator. When a milestone is complete, simply check the **incomplete** round circle to the right of the milestone. The circle should change to **complete**.