How to Enter Goals in Perform2Achieve

This job aid covers:

- Logging into P2A
- Creating goals for FY2020
- Creating goals using the *Create a New Goals* button
    - Personal goal
    - Library goal
- Creating goals using the *Copy From Other Goal Plan* button
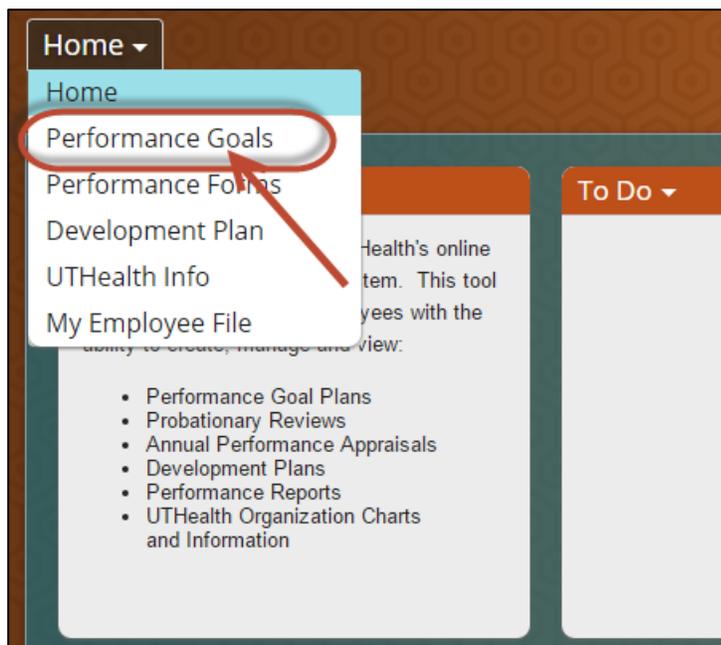- Editing goals

Please note: When FY2019 annual appraisals are launched, your goals from FY2019 will be pulled into the appraisal.
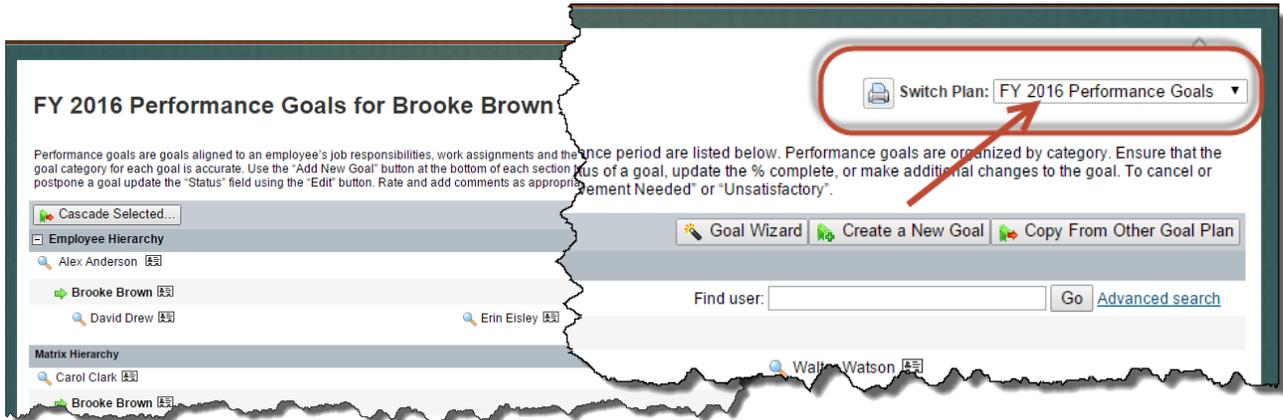
Logging in to P2A

Login to P2A at this address http://go.uth.edu/perform2achieve.

Creating Goals for FY 2020

From the **Home** menu, select **Performance Goals**.

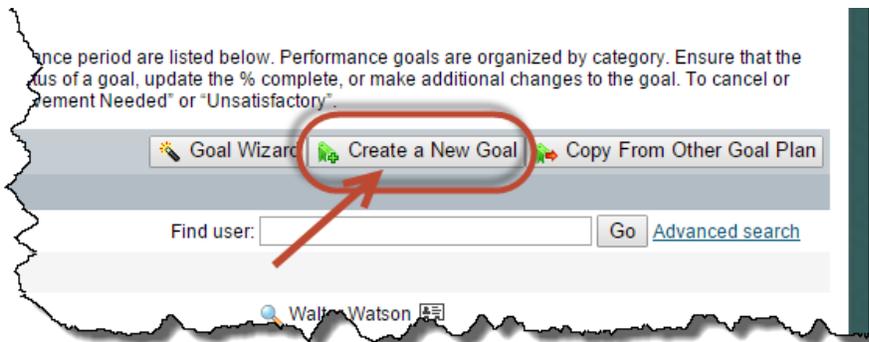**Make sure the goal plan has the correct fiscal year indicated.**

To create your FY 2020 Performance Goals, you have two options:

1. Create a new goal
2. Copy from a previous goal plan

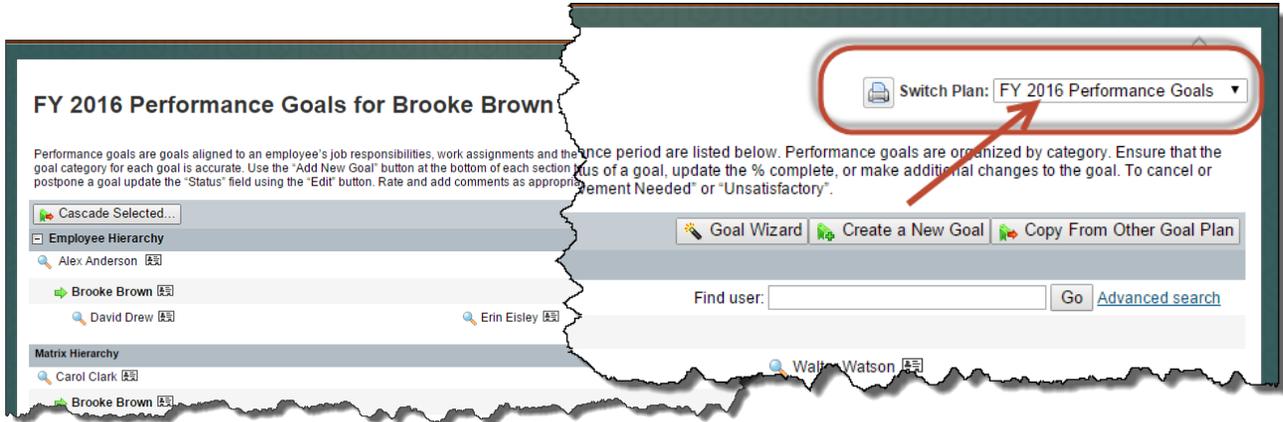## To Create a New Goal

Click the **Create a New Goal** button.

Next, select the type of goal you wish to add: **Personal** Goal or **Library** Goal.

- **Personal** Goals allow you to write your own goal and assign any metrics you want.
- **Library** Goals are selected from an organized library with suggested metrics.

Create a New Goal using the Personal Goal Button

Make sure the goal plan has the correct fiscal year indicated.

Click **Create a New Goal** button.
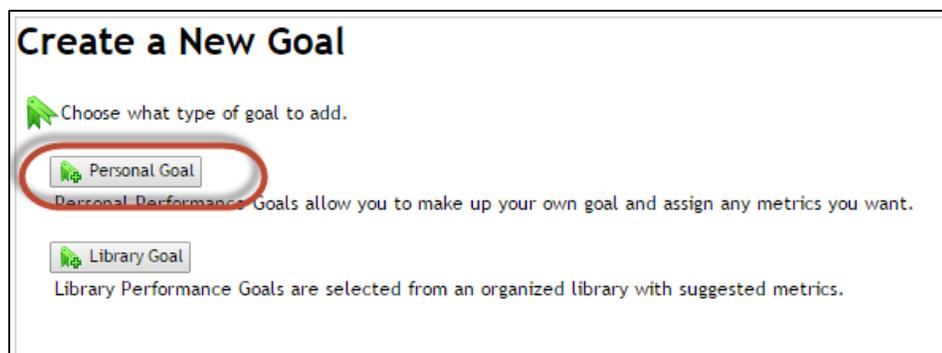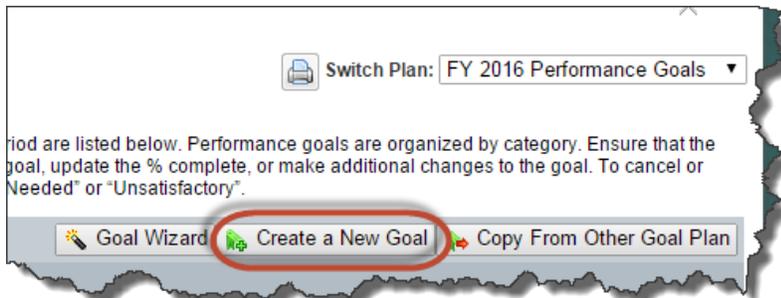
In this example, we are using the **Personal Goal** button.

1. **Select a category** from the drop down menu. (Service Excellence, Financial and Operations, People Development, or Research, Clinical and Academic)

Fields marked with * are required.

Category : Research, Clinical and Academic ▼
Service Excellence
Financial and Operations
People Development
Research, Clinical and Academic

* Goal Name:

2. **Enter the Goal Name (**i.e. Complete two Skillsoft Communications courses.)

* Goal Name:

Complete two Skillsoft Communications courses.|

3. **Enter the Measurement** (How you will know when it is accomplished. How much? How many?)

* Measurement:

Skillsoft completion certificates with passing score.|

4. **Weight-HCPC Only** (You do not need to enter a number in this field.)
5. **Percent Complete** This optional field may be used to chart your progress toward your goal.
6. **Start and Due Date -** These are automatically populated for the fiscal year. Update the start and due date if necessary.
7. **Status –** Select a status from the drop down menu.

Status: Not Started ▼
Milestone: Not Started
                             Behind / At Risk
                             On Track
Comments, Results,   Completed
Accomplishments or   Postponed
Feedback: Cancelled

8. **Milestones -** This is a helpful field to use to list the tasks necessary to complete your goal.

* Start:	09/01/2015
* Due:	08/31/2016
Status:	Not Started ▼

Milestone:	Task Description	Start Date	Due Date	Action
		MM/DD/YYYY	MM/DD/YYYY	⊕ ⇧ ⇩ ✖

Comments, Results,   spell check... legal scan...
Accomplishments or

9. **Comments –** You may use this field to note where you are in the goal completion process. For example: "I have completed one course out of two Skillsoft Communications courses."

Caution: You will not be able to delete goals after you have saved them. Only your manager has access to delete goals. You will be able to edit goals.
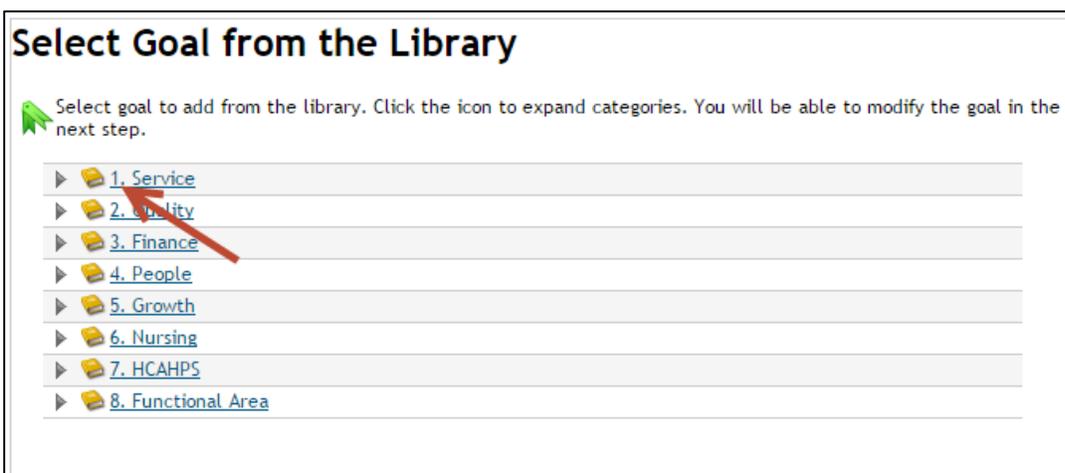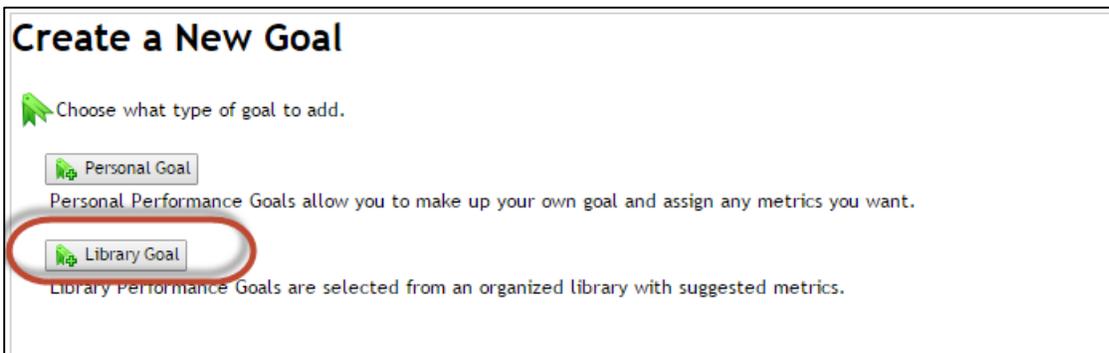
Save your goal entries by clicking on the **Save Changes** button at the bottom right side of the screen.

Create a New Goal using the Library Button

Make sure the goal plan has the correct fiscal year indicated.
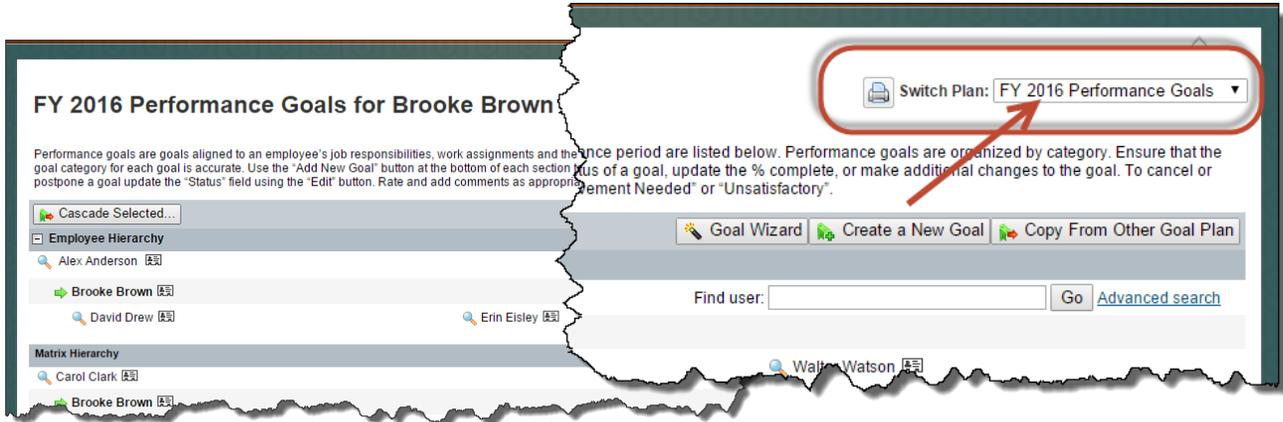
If you choose to create a goal using the **Library** button, click the icons to expand the categories.

After clicking on one of the eight categories of goals, you will select one or more of the prewritten goals from the list.

Click the box to select your goal from the library list. Then click the **Add Selected Goal** button at the bottom right of the screen.
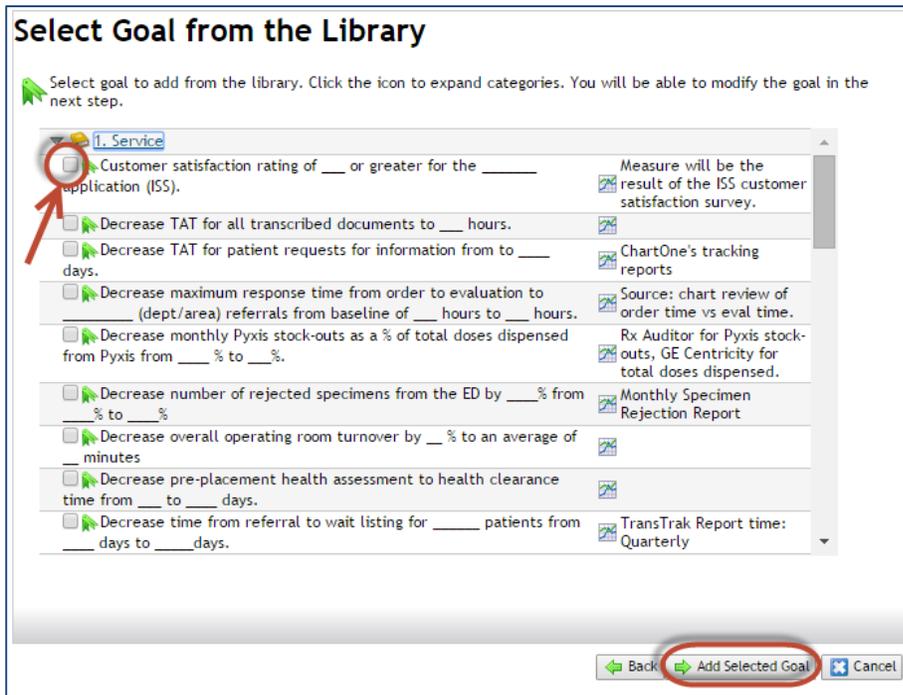
The Goal Name will populate. You will then edit the goal by typing information in the appropriate fields.
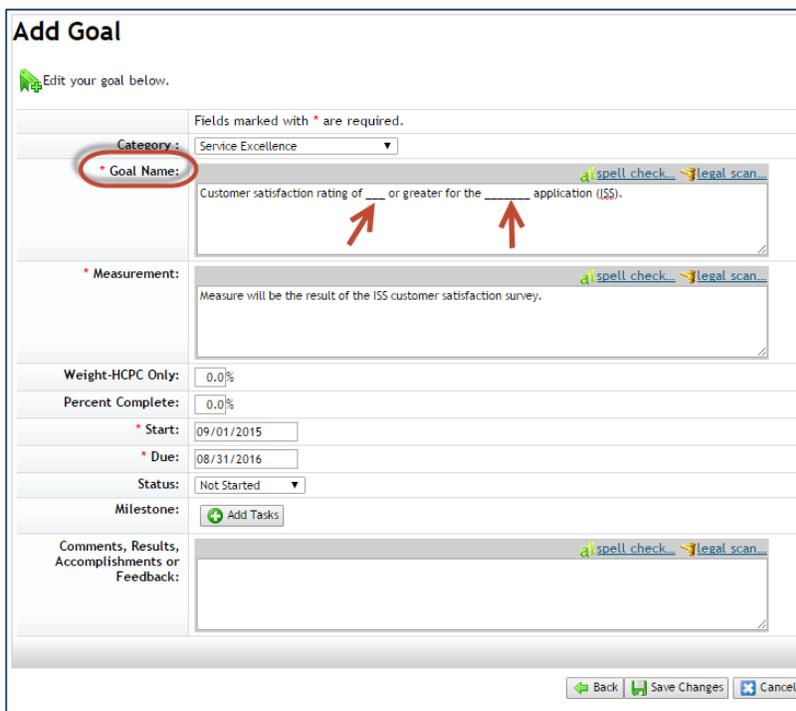
Save your changes by clicking the **Save Changes** button.

Copy a Goal from a Previous Plan

Make sure the goal plan has the correct fiscal year indicated.
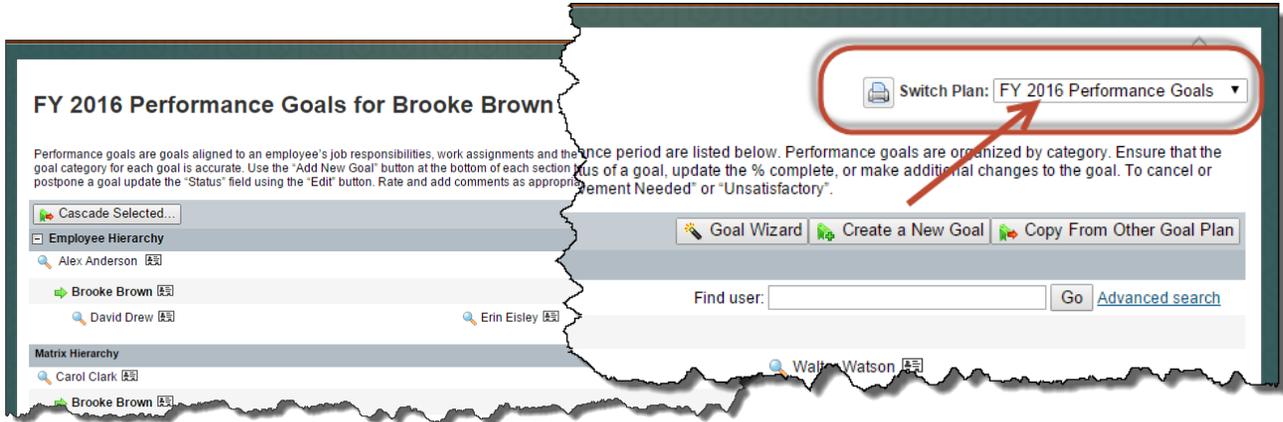
Click **Copy From Other Goal Plan.**
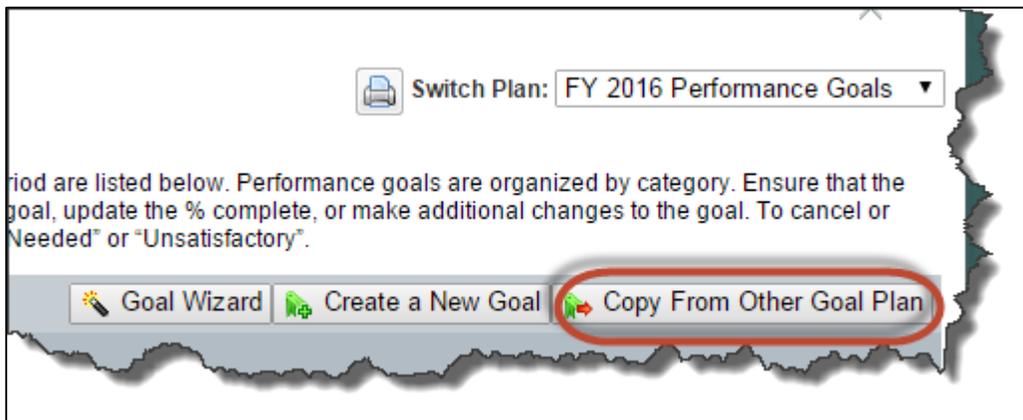
Select the Goal Plan you wish to copy.

After you have entered your goals by either copying from a previous plan or creating a new goal, you will see your goals listed in the designated fiscal year.

Editing Goals

Edit goals by clicking the **Edit goals** icon on the Performance Goals screen show below.

After you edit the goal, remember to save your changes by clicking on the **Save Changes** button.