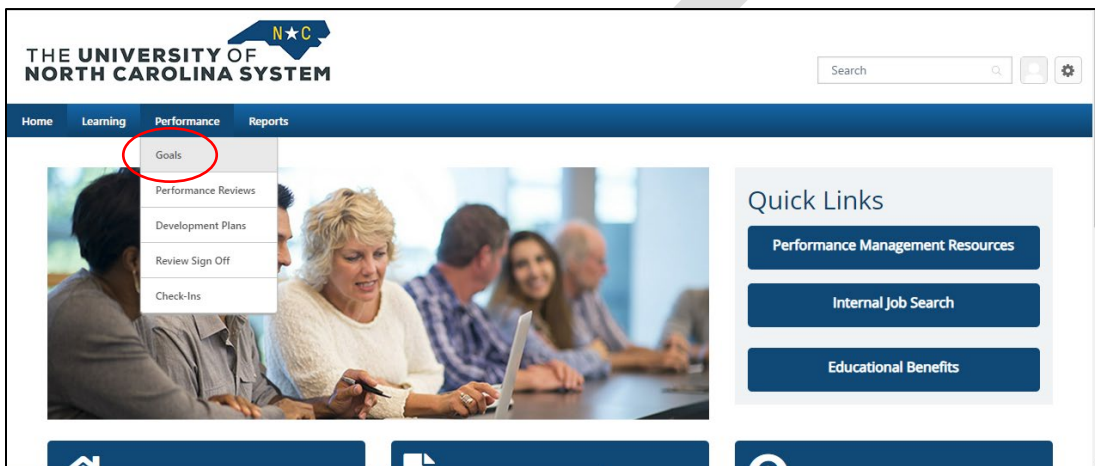


The following instructions will guide managers through the process of “advancing” goals in the performance management process in Talent@System Office. Advancing goals means to move a goal from one performance cycle to the next – for example, to change a goal from the 2022-23 cycle to the 2023-24 cycle.

Navigate to Talent@System Office

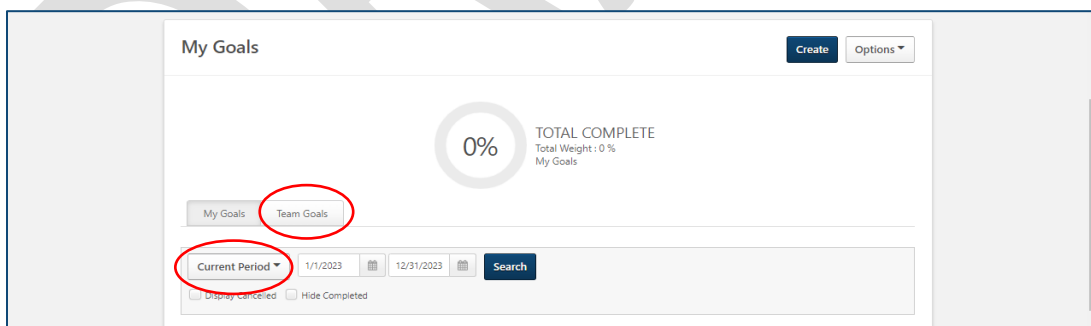
Go to Talent@System Office via the MyApps page or this direct link: <https://northcarolina.csod.com/samldefault.aspx?ouid=1>. You will need to log in with your System Office ID and password and complete two-factor authentication with Duo.

From the Talent@System Office home page, hover over *Performance* and click on *Goals* in the drop-down menu.



Select the Goal(s) to Advance

You will be on the My Goals page. Click the tab for Team Goals.



Under the *Team Goals* tab, you will see a list of your direct reports. In the drop-down box, select the period that includes the goal(s) you want to advance to the new cycle. This will likely be either *Current Period* or *Previous Period* (if we are already in the new performance management cycle).

After selecting the appropriate performance period, find the employee whose goal(s) you wish to advance, and click the arrow on the right side of the screen.

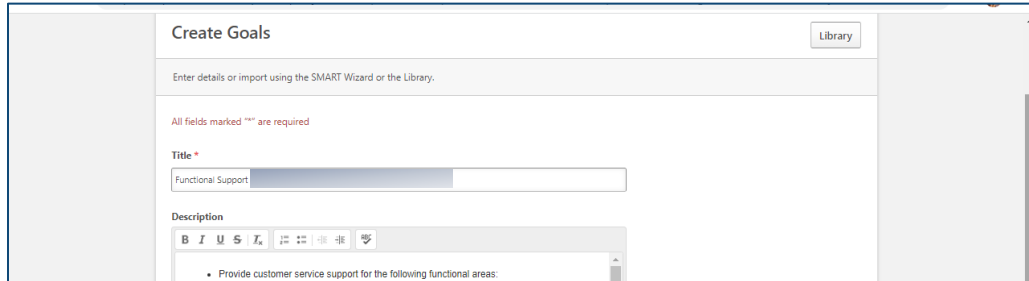
The screenshot shows the 'Team Goals' interface. At the top right are 'Create' and 'Options' buttons. Below are tabs for 'My Goals' and 'Team Goals'. A search bar contains 'Previous Period' with dates '7/1/2021' and '6/30/2022', and a 'Search' button. There are checkboxes for 'Display Cancelled' and 'Hide Completed'. The main area lists three individuals: 'UNCSO-Human Resources Specialist' with 'No Goals in the current period', and two 'UNCSO-Human Resources Consultant' entries, both with '0% Complete' and 'Total Weight: 100%' and '200%' respectively. A red circle highlights a small arrow icon on the right side of the progress bar for the first consultant.

The individual's goals will appear below their name. Select the goal you wish to advance and click the arrow on the right side of the column. Click on Advance in the drop-down box.

This screenshot shows a detailed view of goals for 'UNCSO-Business Systems Analyst'. The 'Current Period' is set to '1/1/2023' to '12/31/2023'. There are checkboxes for 'Display Cancelled' and 'Hide Completed', and an 'All Statuses' dropdown. The goals listed are: 'Functional Support' (0% Complete, Weight: 60%), 'Technical Support' (0% Complete, Weight: 30%), and 'Training and Cross-Training' (0% Complete, Weight: 10%). A red circle highlights a drop-down menu on the right side of the 'Functional Support' goal, with options: 'Cancel', 'Advance', and 'View History'.

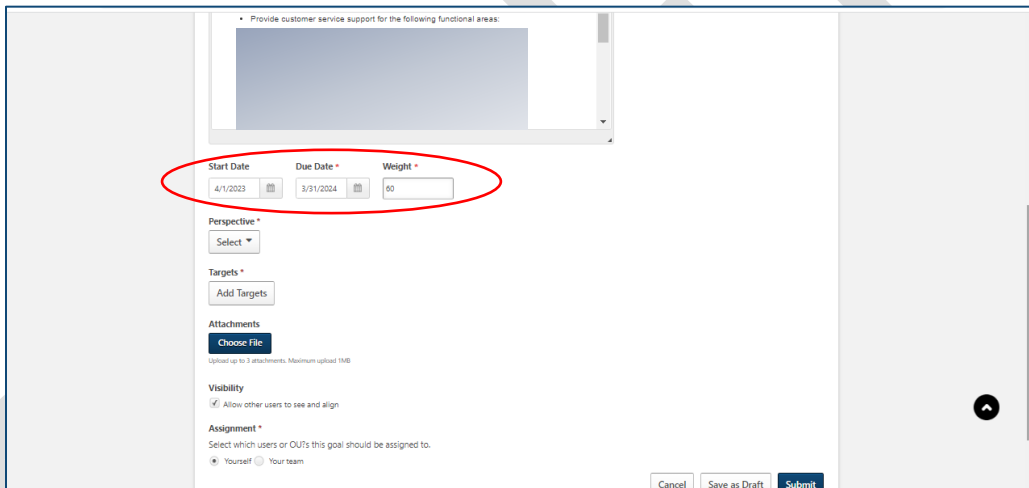
Modify the Goal and Confirm Dates

The goal information will pre-populate into the Create Goals screen.



The screenshot shows the 'Create Goals' interface. At the top, there is a 'Library' button. Below it, a text box says 'Enter details or import using the SMART Wizard or the Library.' A red error message reads 'All fields marked "*" are required'. The 'Title *' field contains 'Functional Support'. The 'Description' field has a rich text editor with the text 'Provide customer service support for the following functional areas:'.

At this point, you can make any needed changes to the goal title and description. Scroll down below the Description box and confirm that the Start Date and Due Date are correctly shown. You can also modify the Goal Weight if needed.



This screenshot shows the lower portion of the 'Create Goals' form. The 'Start Date' is 4/1/2023, the 'Due Date' is 3/31/2024, and the 'Weight' is 60. These three fields are circled in red. Below them are sections for 'Perspective *' (a dropdown menu), 'Targets *' (with an 'Add Targets' button), 'Attachments' (with a 'Choose File' button), 'Visibility' (with a checked checkbox 'Allow other users to see and align'), and 'Assignment *' (with radio buttons for 'Yourself' and 'Your team'). At the bottom right are 'Cancel', 'Save as Draft', and 'Submit' buttons.

Assign the Goal and Submit

NOTE: You must assign the goal to one or more specific team members, or it will be assigned to you by default.

Under Assignment, select the *Your team* radio button, and select the name of the employee(s) who should be assigned the goal for the new performance cycle. Goals can be individually assigned to more than one team member, or you can assign one goal to be shared between multiple team members.

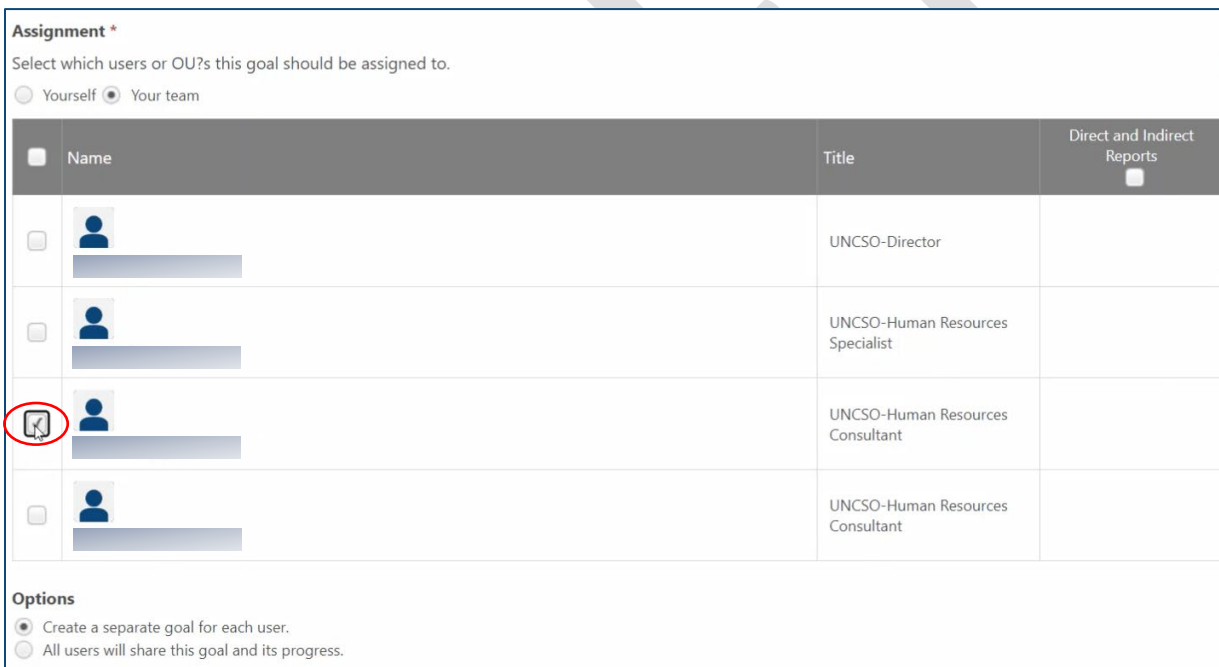


Assignment *
 Select which users or OU?s this goal should be assigned to.

Yourself
 Your team

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports
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Your direct reports will appear below the radio button. Check the box to the left of the name of the employee(s) who should be assigned the goal for the new performance cycle. Goals can be individually assigned to more than one team member, or you can assign one goal to be shared between multiple team members.



Assignment *
 Select which users or OU?s this goal should be assigned to.


Yourself
 Your team

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input type="checkbox"/>	[Redacted]	UNCSCO-Director	
<input type="checkbox"/>	[Redacted]	UNCSCO-Human Resources Specialist	
<input checked="" type="checkbox"/>	[Redacted]	UNCSCO-Human Resources Consultant	
<input type="checkbox"/>	[Redacted]	UNCSCO-Human Resources Consultant	

Options

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

Click Submit in the lower right corner to add the goal to the employee performance plan.



Assignment *
 Select which users or OU?s this goal should be assigned to.
 Yourself Your team