myCareer @CHOP Goals and myCareer @CHOP Performance are electronic, integrated tools that support developing goals and tracking performance. myCareer @CHOP Goals supports the creation and monitoring of individual and team objectives throughout the year. Goals tie directly to the performance appraisal, helping employees and managers actively engage in year-round dialogue and coaching related to their performance. Setting goals is an excellent opportunity for managers (and a manager’s manager) to create “line of sight,” or forming connections for employees between the work they do and the mission of the Organization. When employees have clear goals and know how and why their work matters, they are more accountable for outcomes and commit to helping CHOP achieve its goals. Employees are encouraged to draft goals and suggest adjustments based on their perspective and experience.

myCareer @CHOP Performance is utilized to document ongoing performance updates and discussions between the employee and manager. Discussing performance should be ongoing throughout the year with frequent dialogue between managers and employees, summarized during the annual performance evaluation. This ensures employees have the feedback needed to be successful so that CHOP can meet its goals.

The performance form allows for employees and managers to carry out several functions year-round and should highlight the ongoing conversations that take place throughout the year:

- Establish and update goals
- Verify and amend job responsibilities as needed
- Document progress on goals, job responsibilities, and competencies
- Complete the end of year performance evaluation

As of July 1, 2018, all review-eligible (aka Impact-eligible) employees are included in myCareer Goals and Performance. Everyone should complete their FY’19 goals using the Goals module found at myCareer @CHOP.

Questions and Answers

Access

Q. What are the recommended browsers I can use to access myCareer @CHOP?

A. The supported browser versions are Internet Explorer 11 on Windows 7 and Safari 9.0 and above on Mac OS X. Other browsers may have some functionality, but certain features such as pop-up windows, may be disabled. It is recommended that users utilize the supported browsers outlined above for the best user experience.

Q. Should I save myCareer @CHOP to my favorites?
Frequently Asked Questions (FAQs) – Goals and Performance

**A.** To ensure the most current version of the myCareer @CHOP application is being utilized, users should log in from the page’s main location each time as opposed to saving it to their favorites. Saving the link to your favorites captures the page at a moment in time, which may cause users to access an outdated version. Alternatively, use mycareer.chop.edu to assure you are using the latest version.

**Q.** Once I log into myCareer @CHOP, how do I access Goals and Performance?

**A.** You can access the GOALS and Performance from two locations within myCareer @CHOP: The “To Do” tile on the HOME page or the My Forms page.

**Q.** Once I log into myCareer @CHOP, how do I access Goals?

**A.** From the “Home” dropdown menu in the upper left-hand side of the screen, select Goals. This will take the user into their current goal plan.

**Q.** Once I log into myCareer @CHOP, how do I access Performance?

**A.** From the “Home” dropdown menu in the upper left-hand side of the screen, select Performance. This will take the user to the Performance module.

**Goals – All Users**

**Q.** When do employees set goals?

**A.** New employees should set their goals within the first 90 days of hire. While setting goals is not required, it is highly recommended. For existing employees, goals should be set at the beginning of the fiscal year.

**Q.** Who establishes goals?

**A.** The employee should work closely with their manager in establishing goals. While it is the ultimate responsibility of the manager to ensure that goals are established and monitored, it is a collaborative effort and the employee should be actively monitoring and recommending changes in goals based upon their perspective and experience. Goals should be reviewed between employees and managers at least quarterly.
Q. Who adds goals to the employee’s goal plan?
A. Employees add goals to their goal plan after collaborating with their manager. You will want to identify and agree upon SMART goals that are aligned with your team’s or enterprise goals. Managers and a manager’s manager (second level manager) also have the ability to cascade their own goals down to their direct reports, which can be edited during the cascading process or at the employee level once cascaded, or create a new goal directly in the employee’s goal plan. This allows departments and leadership to better align their team’s goals with their own goals and the goals of the enterprise. Lastly, Managers also have the ability to add goals to an employee’s goal plan and/or Performance Form.

Q. What are the characteristics of goals?
A. Goals should be SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound), and the process guides you in that direction. While goals may cross over multiple fiscal years, the focus for each goal should be on what will be accomplished during the course of the review period. Goal plans are made available to employees within the myCareer @CHOP system year over year to help track against multi-year or longer term strategic efforts. Goals may shift over the course of the year. Updates can be made by either the employee or manager, and are visible to both. Note that there is an audit trail for goal editing, with visibility to each version of the goal.

Q. What are SMART GOALS?
A. SMART Goals - SMART is an acronym and provides a clear guideline in which to establish performance goals.

S = Specific
Goals should be clear and detailed and emphasize the task(s) that you want to achieve.

M = Measurable
Goals must have observable, verifiable measures.

A = Achievable
The measures must be fully achievable by the employee and agreed upon by the manager and employee.

R = Relevant
Goals should have significance to the employee’s job duties and to the organizational goals and mission.

T = Time-bound
Goals must be measurable within the rating period. Setting an end point for a goal gives you a clear target to work towards.
Q. How should I determine my goals?
A. Goals are established at the enterprise level and can be cascaded down so that all employees are involved in executing CHOP’s vision and strategy. Your individual goals should be tied to your team’s and department’s goals. Team and department goals are linked to your divisional/functional goals, which in turn are aligned to CHOP’s strategic goals.

Q: What is the “job responsibility” option in the goal category?
A. The job responsibility category is created for employees and managers to track progress and capture feedback against specific job responsibilities directly by adding those responsibilities to the performance form. All employees will see a general job responsibility “performs core requirements of the role” to capture discussion and evaluation of basic requirements of their job. You will not be able to edit this specific goal, as it is a placeholder to ensure your core duties are a part of your overall goal discussion and planning. However, employees who would like to discuss or evaluate more functional job responsibilities can add them in the Job Responsibilities section of the Goal Plan. If you have additional questions about this category, please talk to your manager.

Q. What is an employee’s role in establishing goals?
A. An employee’s role is to:
  - Draft goals and suggest adjustments based on perspective and experience
  - Collaborate with managers to identify SMART goals that align with the team’s and organizational goals
  - Add goals to your goal plan
  - Meet with manager regularly to review progress on goals
  - Focus current job performance on achieving goals
Frequently Asked Questions (FAQs) – Goals and Performance

Q. What is a manager’s role in establishing goals?
A. A manager’s role is to:
   - Collaborate on and review goals developed by their employees
   - Provide “Line of Sight” (providing visibility to employees on how the work that they do connects to CHOP’s initiatives, objectives, and mission) through multi-level visibility and cascading goals to their teams
   - Ensure goals are aligned between individual, team, and department
   - Add goals to their team’s plans
   - Actively monitor, document, and ensure effective communication on progress within the organization

Q. Can goals be deleted?
A. Yes. The goal plan is a working document. It can be viewed and goals can be updated at any time. We recommend that if a goal is no longer appropriate or applicable, rather than deleting it, update the status to “No longer applicable.” Note that goals that are deleted cannot be recovered, and thus there will be no audit trail.

Q. If my goal has changed, what do I do?
A. Managers and employees can edit goals. There will be an audit trail of goals that are changed or edited so that both employees and managers are aware of the changes that have been made. Note that goals that are deleted cannot be recovered, and thus there will be no audit trail.

Q. Can I capture performance notes and updates about my goals throughout the year?
A. Yes, you and your manager should capture notes and updates on your goals, as well as reflect changes that may occur through the course of the year. You will do this in the “Performance” section of the system by using the comment boxes in the Performance Form. You can also keep track of the status of your goals (e.g. “on track” or “no longer applicable”) directly in the Performance Form throughout the year.

Q. When should I be setting goals for myself and can they change throughout the year?
A. Employees and managers should be setting goals at the beginning of the fiscal year (July-August), however, we realize that goals can change or shift throughout the year. It is recommended that employees and managers review goals together at least on a quarterly basis. This will ensure continued alignment and ongoing dialogue about progress, potential roadblocks, or changes to be accounted for when trying to meet goals.

Q. Can I add additional goals within the Performance Management module?
A. Yes, goals can be added to your goal plan directly using the “Add Goal” link found in the “Goals/Job Responsibilities” section of the Performance Form, or goals that you have already created can be linked to your performance plan. You need not navigate to the Goals module to set up goals. One exception: Cascading Goals can only be done through the Goal Module.
**Frequently Asked Questions (FAQs) – Goals and Performance**

**Q.** Will someone tell me when I should be setting my goals?

**A.** Yes, you and your manager should be communicating about goals. This usually happens at the beginning of the performance review process, typically at the beginning of the fiscal year. CHOP also reminds managers and employees about goal setting at the beginning of the fiscal year. If you have any questions, please contact your manager.

**Q.** When creating a new goal, how do I know if a goal should be categorized under “Performance Goals” or “Job Responsibilities”?

**A.** Any new goals you add should be performance-related and categorized as such. All employees will have a general job responsibility goal of “performs core requirements of their role” included in their Performance Form. Any additional job responsibilities or core duties can be included in the existing job responsibility section of the performance form. You do not need to add any additional job responsibilities to your Performance Form unless requested by your manager. It is recommended that if job responsibilities are added that they be added in summarized form due to character limitations.

**Q.** Do I need to set a start date / due date on my goals?

**A.** Yes, each goal requires a start date and due date. These will default to the beginning and the end of the current fiscal year, respectively. It is up to you and your manager to determine if the default dates are sufficient or if more specific dates need to be set for your goals.

**Q.** Do I need to assign a status to my goals?

**A.** You are not required to track the status of your goals using this field in the system, but it is highly recommended. Each goal you set up will default to the “Not Yet Started” status. Both you and your manager have the ability to update the status of your goals so you can both track progress throughout the year.

**Goals – For Managers**

**Q.** When should I be setting goals for my team?

**A.** Goals for current employees should be established at the beginning of the performance review process (typically the beginning of the fiscal year) and updated as new goals arise or priorities shift throughout the year. Goals should be established for new hires within the first 90 day of their start date. Eligible new hires will gain access to Goals and Performance 14 days after their date of hire. Transfers into the department should have goals established during the new role introductory period (90 days).

**Q.** Whose job is it to set goals?

**A.** It is a collaborative effort between you and your employees; however, it is the manager’s responsibility for ensuring that each employee has goals established.

**Q.** Can I as a manager see the progress of my team on establishing their goals?

**A.** Yes, managers can see their team’s progress based on the updates each employee has made. To view this information, select “Analytics” from the dropdown menu on the Home page. Select “Dashboard” to view progress.
Frequently Asked Questions (FAQs) – Goals and Performance

**Performance – All Users**

**Q.** What is my role in establishing and managing my own performance?

**A.** Your role as an employee is to be accountable for your performance outcomes as well as your growth and development including:

- Ensuring you are clear as to what is expected of you in your role by having frequent discussions with your manager
- Drafting and documenting your goals and suggesting adjustments based on your perspective and experience
- Collaborating with managers and peers as necessary to complete tasks or projects as assigned
- Meeting with your manager regularly to review progress on your performance and to ensure alignment with expectations

**Q.** What is my manager’s role related to supporting my performance?

**A.** Your manager’s role includes:

- Setting expectations for goals and job responsibilities and holding you accountable for completing them
- Continually providing you with feedback and support on your performance through frequent interaction and discussions
- Ensuring that goals and work are aligned between individuals, the team, and the department

**Q.** Can I capture performance notes and updates in my Performance Form?

**A.** Yes, it is strongly recommended that you and your manager capture notes, updates, and share information in myCareer Performance year-round. This will help make sure you and your manager are aligned throughout the year, will support your ability to be successful on your goals and responsibilities, and will lead to a productive evaluation discussion at the end of the year.

**Q.** The Performance Form follows a Route Map. What is a Route Map?

**A.** A route map is step by step process that tracks forms from start to completion. A route map is at the top of the form and will show you and your manager where the form is in the performance process. These steps display to everyone who is responsible for each step of the performance process. Current steps are highlighted in blue. Steps to the left of the current step have been completed and steps to the right will be completed in the future. Completed steps are signified with a check mark. The form is advanced to the next step by clicking the appropriate button at the bottom of each form.

**Q.** How will I be notified it is time to complete a self-evaluation?

**A.** Self-evaluations should start near the end of the performance period, on or about June 1st. Your manager may ask you to complete it earlier by routing the form to you in the system or you will receive an email letting you know it is due. Additionally, employees can begin their self-evaluation by selecting the “Send Form to Self Evaluation” button after completing the “Goal Setting/Ongoing/Midyear” step. Employees do not need their manager to send them the self-evaluation to start the self-evaluation process if they are ready to start it.

**Q.** Is a self-evaluation required?

**A.** It may be required by your manager and is strongly recommended, as it is your opportunity to remind your manager of all of your accomplishments and to discuss challenges you may have encountered throughout the previous year.

Revised: June 21, 2018
Frequently Asked Questions (FAQs) – Goals and Performance

Q. Am I required to rate myself for each competency?
A. Self-rating is optional unless required by your manager.

Q. Do I need to provide comments?
A. Comments, based on updates you and your manager share throughout the year, are strongly recommended. This is particularly the case for areas in which you believe you excel as well as those areas in which you would like to grow and develop.

Q. Will my manager be soliciting feedback from my colleagues and stakeholders?
A. They may, yes. Managers are encouraged to gather feedback from others to have a more informed perspective about your performance so as to be able to help reinforce and reward your strengths and to support your growth in areas where you are not as strong. You should talk to your manager if you have questions or concerns about this process.

Q. Who should I call if I have questions regarding the performance evaluation process?
A. It is encouraged that you have a conversation with your manager and ask them any questions you may have. If additional guidance is necessary, see the @CHOP intranet page on performance management. If further assistance is needed, please call your HR Business Partner. For technical assistance, please contact support by phone by dialing 4-HELP.

Performance – For Managers

Q. When should I be using myCareer @CHOP Performance?
A. All year long! Performance Management is an ongoing process of dialogue, feedback and coaching between managers and employees about expectations, goals, competencies, and performance. These conversations may occur through formal venues (one on one meetings) or informal venues (such as rounding and day-to-day interactions). These conversations ultimately lead to the performance evaluation. Managers are encouraged to use myCareer Performance to set goals and to support sharing of information at the start of and throughout the year.
Q. When should I be completing performance evaluation forms for my team in myCareer Performance?
A. Employees receive a formal review once per year.

The performance review process for each fiscal year (7/1-6/30) will start on or about June 1st and run through mid- to late-August.

A manager may work with their employees to complete the process earlier than the deadlines established above (e.g. you can ask your employee to begin Self-Evaluation prior to June 1, ) but the deadlines will not be extended.

Q. Is a mid-year evaluation required?
A. A mid-year progress review is encouraged and need not be a “formal review.” The mid-year conversation is most effective when it takes the form of a coaching conversation by leveraging the opportunity to take a step back, reflect on progress, and ensure alignment on expectations between managers and employees. Mid-year discussions should be documented in the “Comments” section of the form and should be dated.

Q. Am I required to add comments for the year-end evaluation?
A. Any comments or summary made by either the employee or manager throughout the year should be sufficient to support the performance evaluation conversation. End-of-year comments can be added to supplement and/or summarize.

Q. Should I obtain feedback from other managers, customers, or other stakeholders?
A. The performance form supports this with “Ask For Feedback” functionality and it is your option as to whether you would like to obtain feedback by utilizing the this feature. Feedback from others can be useful when:

- Concrete examples are desired to support conversations for growth and development
- The employee is in a customer facing or service oriented role
- In cases in where there are multiple stakeholders who rely on the employee’s work

Feedback should be kept CONFIDENTIAL and should be shared thematically. If you need help in deciding whether or how to use feedback from others, please contact your HR Business Partner. Feedback received from others goes into the attachment pod and is only visible to the manager.
Q. Do I determine the overall rating?
A. Yes, while the system will provide a calculated rating visible to the manager during the “Manager Evaluation” step (from the manager’s view only) based on scores a manager has assigned, the manager is responsible for assigning an overall performance rating based on an employee’s overall contributions. While the rating is used to help inform a manager’s thinking, the most important component of driving higher performance is the coaching and feedback conversations that occur throughout the year.

Q. Should I print or send a copy of the evaluation and give it to the employee?
A. You may print or send a .PDF of the employee’s form to them at any part of the process. However, be aware that on printed and .PDF copies, the system calculated rating will appear except in the “Discussion and Manager Signature” step. Employees can print off a copy of their form once the performance document moves to the “Employee Acknowledgement” or “Completed” steps, where only the overall rating assigned by the manager will be visible to them. If you want to have a printed copy to share with the employee prior to the employee acknowledgement step, make sure print or .PDF only at the “Discussion and Manager Signature” step. At this step, the manager view will only show the overall rating the manager selected. The calculated rating will not be visible.

Q. Do I need to gain approval from my manager on my team’s ratings?
A. You should work with your manager or department head on the desired approval process prior to finalization of performance ratings and having a discussion with the employee regarding their overall performance.

Q. Will there be training for managers to assist with learning about this new system?
A. Yes, instructional videos and quick reference guides (“QRG”) are available on the Performance @CHOP page, packaged as eLearning in myCareer Learning, and available in the “Help & Tutorials” link in the Performance Form. Instructor-led training sessions (also known as webinars) are available for those who need additional assistance. See myCareer Performance for more information.

Q. What tools are available if I have questions?
A. If you have questions about how to manage performance, visit Performance Management@CHOP. Your HR Business Partner is also a resource to you. If you need help using myCareer Performance, job aids and videos are available to you. For additional technical support, contact 4-HELP.

Q. Will I have access to historical reviews for employees?
A. Yes, going forward any historical reviews completed in myCareer performance will be viewable. This would include any employee that transfers to your department if the previous manager used myCareer Performance. Historical ImPACT reviews (paper) will continue to be housed in the employee’s departmental file and will not be uploaded to myCareer for viewing.

Q. My employee is on a Leave of Absence during review time. When should I provide them with their review?
A. Upon their return from Leave of Absence, the performance review discussion and closeout should take place. If there is a compensation action associated with the review that too, will be processed upon their return from Leave of Absence and will be retro-active to the merit increase date.