



For staff

## Enter and Edit a Goal

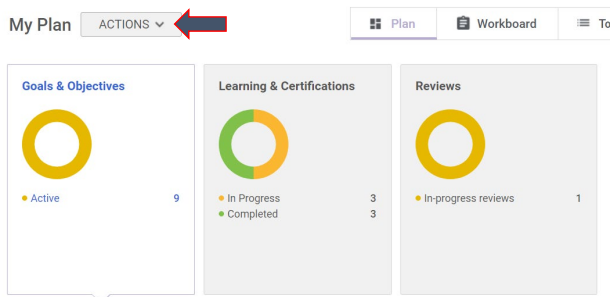
*Performance Excellence Job Aid*

For staff, this job aid shows you how to [enter a new goal](#) and [edit a goal](#) in myHRLearn.

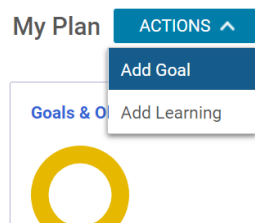
It is recommended that staff enter goals at the beginning of the performance year, and staff may also add new goals throughout the year. It is recommended to have 2-4 Active goals at any given time.

**To enter a new goal**, login to myHR Learn at [learn.northwestern.edu](http://learn.northwestern.edu)

1. In the navigation bar click on the **ME** tab
2. Next to **MyPLAN** click on the **ACTIONS** drop-down menu



3. Select **ADD GOAL**



4. A new screen will appear that says **ADD GOAL**. Complete the following fields:

**Add goal**

ALIGN TO PARENT GOAL

Title\*  
Sample Goal Title

Description  
Test Goal

Category\*  
Performance Goals

Visible to  
My manager & above

Exclude from Review  
ON OFF

Start Date\*  
12-Jan-2021

Due Date\*  
14-Jan-2021

5. **Title** of the goal (255 character limit).  
Add a SIMple title

Title \*

6. **Description** of the goal (OPTIONAL- use this space to add detail, metrics, or milestones).

Description

Description of the goal (OPTIONAL- use this space to add detail, metrics, or milestones).

7. **Category** of the goal, from the drop-down menu, select from the following:

- **Performance Goals** - goals tied to performance outcomes prioritized within your role, connected to job responsibilities, special projects or professional skills and/or behavior.
- **Professional Development** - goals related to growth, including gaining knowledge, practicing skills or acquiring job-related experience that may help you develop as a professional, but are not required for current performance.

Category \*

Select...

Performance Goals

Professional Development

8. **Start and Due Date** - Select an appropriate start date and target date for completion

Start Date \*

Due Date \*

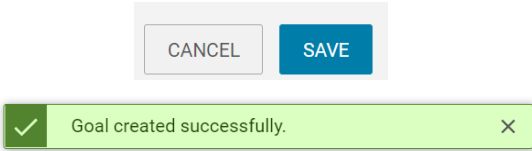
9. Depending on the time of year, you have the option to choose if you would like this goal added to your review. By default the “Exclude from Review” is turned off

Exclude from Review

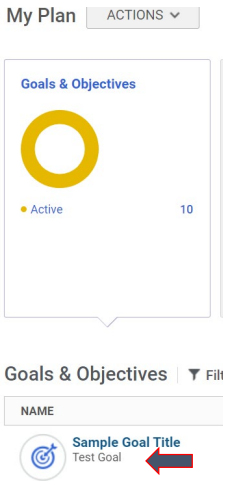
ON OFF

meaning goals are included in reviews.

10. Once you complete, scroll down past Goal Activities and Resources and Click **SAVE** . You will see a green bar that says “Goal created successfully”



11. After clicking SAVE, go back to the **ME** tab and ensure that your new goal is visible.



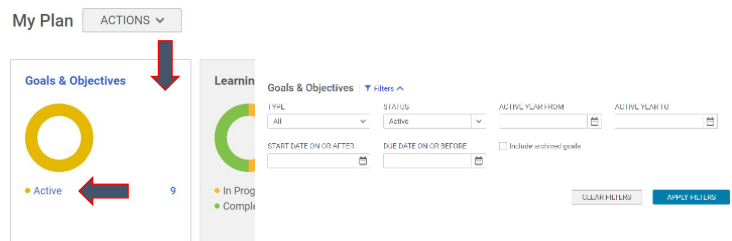
For staff, this section of the job aid shows you **how to edit a goal previously entered** in myHRLearn. Goals may be edited throughout the year due to role changes, supervisor or team changes, or reprioritization.

**To edit your goals:** Login to myHR Learn at [learn.northwestern.edu](http://learn.northwestern.edu)

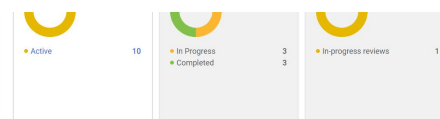
1. Click the **ME** tab along the purple bar at the top of the homepage



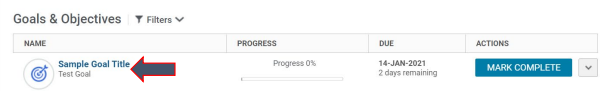
2. Click on the Goals & Objectives Section and then click on **ACTIVE**. You can also use Filters to get to Active Goals



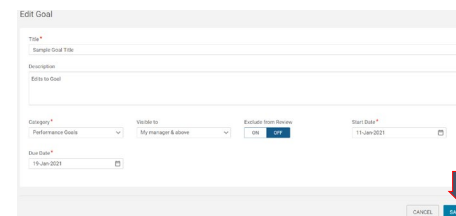
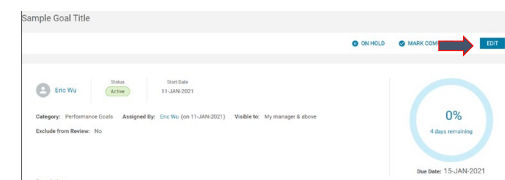
3. You now will be able to see just your active goals



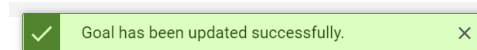
4. When you click on the blue title, your goal will now appear in a new window. In the upper-right hand corner click the blue **EDIT** button



5. Edit your goal (e.g. title, description, due date) and click the blue **SAVE** button  
Note: You will see a green box pop-up and disappear to confirm that your changes have been saved.



6. If this goal is a part of a current review, all changes made here will be reflected within the review form.



Ready to login? [learn.northwestern.edu](http://learn.northwestern.edu)

Access additional tools and resources: [perform.northwestern.edu](http://perform.northwestern.edu)

Help: For policy and process questions, [contact your unit's HR Administrator](#). For technical support: 847-491-4357 (1-HELP) or [consultant@northwestern.edu](mailto:consultant@northwestern.edu)