

Goal Setting Job Aid

1 Access the Performance Management System

- Go to the NYC Intranet: <http://cityshare.nycnet>
1. Click **Working > NYCAPS > Start NYCAPS**
 2. Enter your User ID and Password in the fields. (Your User ID is the 7-digit reference number found on your pay stub.)

User ID:

Password:

[Forgot your password?](#)

Troubleshooting Tip

- If you have not logged in within 90 days, the system will prompt you to change your password.
- If you cannot remember your password, click the **Forgot Your Password** link to reset your password.
- If you have locked yourself out of the system or cannot remember your security questions, please contact HR Connect (see contact information below) to reset your password.

2 Add, Edit, or Delete Goals

1. Click **Employee Self Service > Performance Documents**. You are now at the main **Employee Documents** screen and can view your performance documents in a list. The **Search Criteria** box enables you to sort your documents if you choose.

Search Criteria

Document Type: Performance Review

Earliest End Date: Author Type: Employee

Your Documents

Begin Date	End Date	Document Type	Document Status	Approval Status	Author	Author Type	Author Status
07/01/2008	06/30/2009	Perf Rvw	InProgress	Not Required	Employee Name	Employee	InProgress
07/01/2007	06/30/2008	Perf Rvw	InProgress	Not Required	Employee Name	Employee	InProgress

Troubleshooting Tip

Generally, if you choose a blank field in the drop-down you will un-sort the data. If you un-sort the **Author Type**, you notice that each employee has 2 documents: one with the employee as the **Author** and the other with the supervisor as the **Author**. You will set goals, document progress, and perform a self-evaluation in the **Employee** document. The only time the **Manager** document is used is at the end of the year, when the manager performs a year-end evaluation on you.

Troubleshooting Tip

The **Author Status** column currently should state "In Progress". After you complete your goals and send them to your manager, this column will state "Complete".

Begin Date: 07/01/2007 Due Date: 06/20/2009

End Date: 06/30/2009 Document Status: In Progress

Job Title: ADMIN STAFF ANALYST

[Expand All Sections](#) [Collapse All Sections](#)

- ▶ Achievement Goals
- ▶ Satisfaction Goals
- ▶ Operational Goals
- ▶ Overall Summary

Calculate All Ratings Complete

2. Click the hyperlink of your name for the most recent document (**End Date** column), for this is the document you will enter your goals into.
3. You are now in the **Maintain Performance Document** screen, where you can add, edit, or delete your goals. You should see 4 categories: **Achievement Goals**, **Satisfaction Goals**, **Operational Goals**, and **Overall Summary**.
4. Click **Expand All Sections** to view the document in more detail. The Achievement and Satisfaction goals are organization-wide targets that all employees are accountable for. These goals should already be pre-populated into the system for you. Read through these goals to understand the targets that each employee of the DOE collectively seeks to achieve.

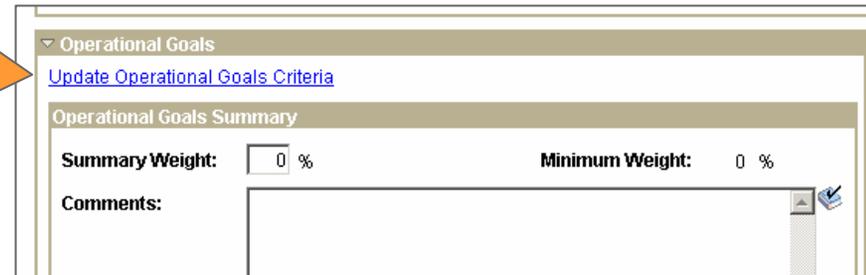


Goal Setting Job Aid

5. Scroll down to the **Operational Goals** section. This is where you input the goals that you have developed with the guidance from your supervisor. Click **Update Operational Goals Criteria** > **OK**.

Troubleshooting Tip

If you cannot find this link, your document may be in the possession of your supervisor. Go back to the Employee Documents screen and make sure the Author Status column states "In Progress". If it states complete, ask your manager to return the document back to you.



Maintain Performance Document

Update Operational Goals Criteria

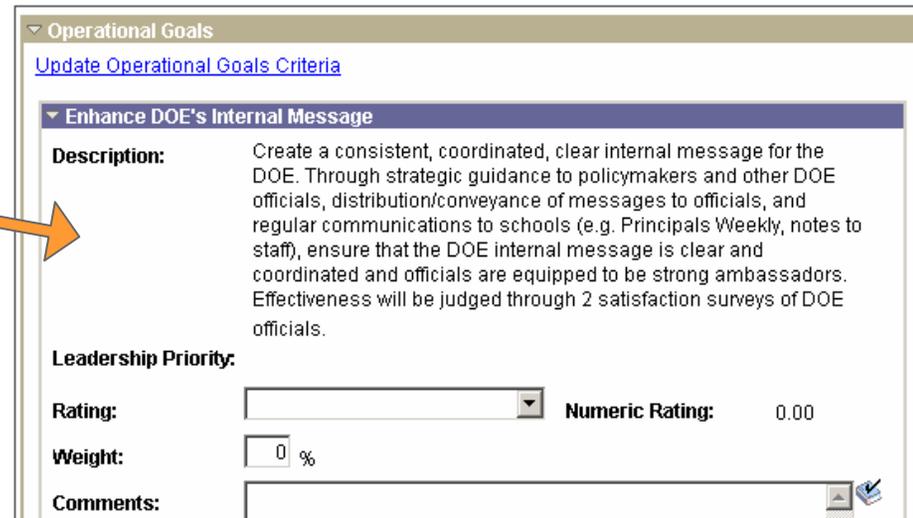
Your Name

Operational Goals

Add Operational Goals

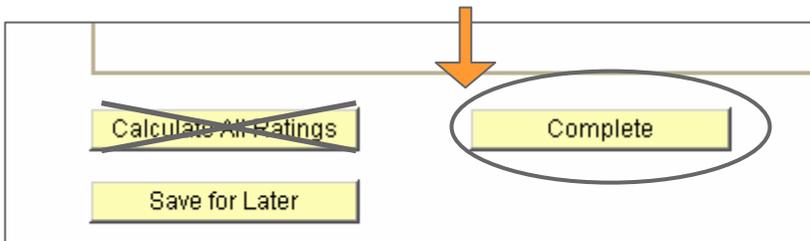
[Return to Maintain Performance Document](#)

6. From this screen you are able to add, edit, or delete goals. To add a goal, click **Add Operational Goals**. Enter the title and a description of the goal. In the **Leadership Priority** box, enter the number of the Chancellor's Leadership Priority that the goal aligns with. The Leadership Priorities can be found on the left tool bar. (For more assistance with how to create goals, see the Goal Setting Overview presentation found on the Additional Resources page of the Performance Management web page.) Click **Save** > **OK**. Continue to add your goals in one by one the same way as the first. If you would like to edit or delete a goal, simply click on the appropriate button. After you are finished adding all of your goals, click **Return to Maintain Performance Document**.



7. Now you have the option of adding weights to the goals you just entered. (If you do not add weights, the system will just weigh them equally.) Under each goal there is a Weight field. If you choose, enter the weight you wish to give each goal. (If you weigh one goal, you must weigh them all.) The **Overall Summary Comments** box is also optional, and if you choose, you may add summary notes into it.

8. From here you can choose to click **Save for Later** (so you can come back to your document and finish it) or **Complete** to send it to your supervisor. Please note, your supervisor will not be able to review your goals until you click the **Complete** button.



9. You are now finished entering your goals! You can click the **Sign Out** button in the top right-hand corner to exit the system. Your supervisor should review your goals and set up a meeting to discuss them.