

PERFORMANCE STEPS FOR CORE STAFF IN PAYLOCITY

Purpose

Lifeworks utilizes Paylocity as a comprehensive tool for tracking employee development and performance. This training will cover the following:

- [Filling out 360 Feedback](#)
- [Filling out the Self- Assessment](#)
- [Entering Goals into Paylocity](#)
- [Updating Goal Status in Paylocity](#)

Reference Lifeworks Today each year for timelines and due dates for each of these tasks.

Performance Dashboard

The following tasks will be available in the Performance tab of Paylocity. Once logged into Paylocity, click the hamburger icon in the upper left corner of the page followed by selecting Performance.



360 Feedback

360 feedback requests will be assigned to all employees, usually sometime in quarter four of every year. Staff may receive one or multiple requests to provide feedback on their colleagues.

Feedback Requested of Me

Once your supervisor has assigned a 360-feedback request, you will see a number under active in the My Feedback section. Click on the number to complete the request.



Filling out 360 feedback

Provide feedback to each question, including adding comments. While your supervisor may see your name attached to the responses, the individual receiving the feedback will not have access to this document.

1. This person communicates clearly and concisely.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
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2. This person actively listens to others.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
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3. Comments - Communication

Enter text

Self-Assessments

The Self-Assessment allows Lifeworks CORE staff to evaluate their skills and abilities each year. This feedback is then sent to the manager and will be a significant part of the end-of-year Lifeworks review.



My Reviews

Self-Assessments can be found on the My Reviews section of the Performance tab of Paylocity. The HR department will assign this assessment to all staff in quarter four of every year. When ready to complete the Self-Assessment click on the subject line under review. Your assessment type will depend on the position that you have at Lifeworks.

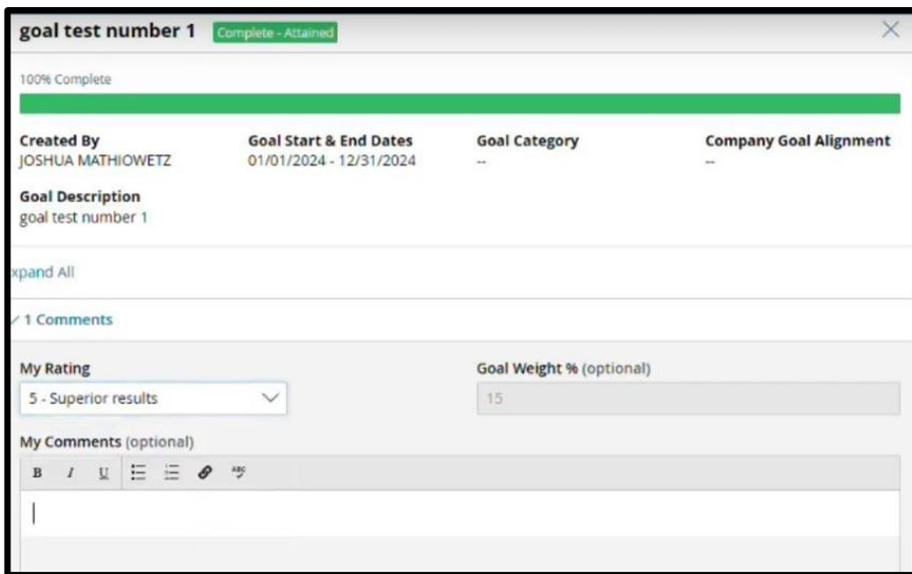
Review	Status	Reviewer	R
2024 Performance Review - Program 2024 Performance Review - Program	Employee Self Appraisal Pending	MICHELLE L HANRAHAN	...
2024 Performance Review - Non Program 2024 Performance Review - Non Program	Employee Self Appraisal Pending	MICHELLE L HANRAHAN	...

Including Goals

An important part of the Self-Assessment is reviewing your personal goals for the year. For this to take place, the goals must already be in the goals Performance tab. This step is normally completed by Human Resources, but if you do not see your goals select “include existing goals” in the Self-Assessment. You will then be able to select each goal and apply it to your assessment.

Self-Assessment

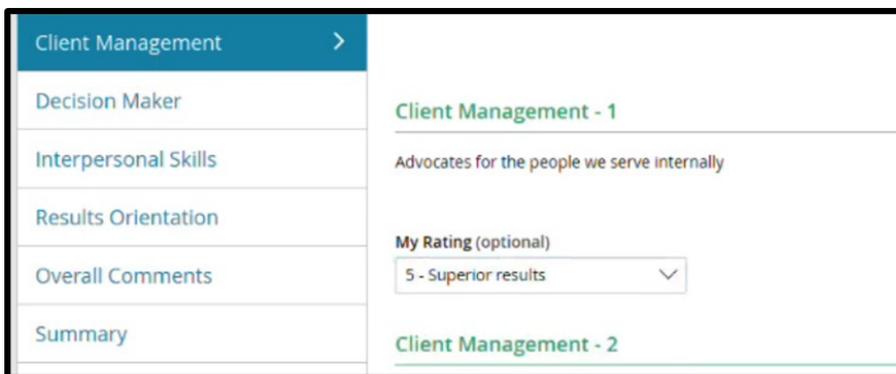
With the goals added, rate and add a comment on each goal. Make sure to save often along this process.



The screenshot shows a goal assessment form for "goal test number 1" which is marked as "Complete - Attained". A green progress bar indicates "100% Complete". The form includes the following fields:

- Created By:** JOSHUA MATHIOWETZ
- Goal Start & End Dates:** 01/01/2024 - 12/31/2024
- Goal Category:** --
- Company Goal Alignment:** --
- Goal Description:** goal test number 1
- Expand All:** (button)
- 1 Comments:** (notification)
- My Rating:** 5 - Superior results (dropdown menu)
- Goal Weight % (optional):** 15 (input field)
- My Comments (optional):** (text area with rich text editor icons)

Once all goals have been rated, scroll to the top of the page and select the next category on the left side of the screen. Repeat the rating process until all sections have been filled out.



The screenshot shows a category selection menu on the left side of the screen. The categories listed are:

- Client Management >
- Decision Maker
- Interpersonal Skills
- Results Orientation
- Overall Comments
- Summary

The right side of the screen shows the details for the selected category, "Client Management - 1":

- Client Management - 1**
- Advocates for the people we serve internally
- My Rating (optional):** 5 - Superior results (dropdown menu)
- Client Management - 2**

Submitting the Self-Assessment

After all fields of the Self-Assessment have been filled out you can send it to your supervisor by clicking Submit to Reviewer.



Signing the Review

Your supervisor will complete their portion, answering the same questions, followed by having an end of the year review with you. When that takes place you will be sent a task to sign the review. After you sign, your supervisor will also sign, which will then finalize the review. You can then start to enter the following year goals into Paylocity.



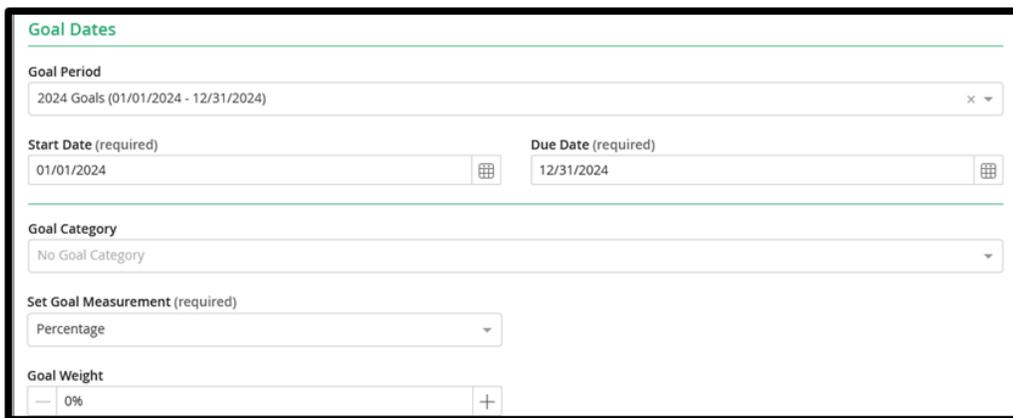
Entering Goals into Paylocity

The My Goals area of Paylocity is where you can create and manage your personal goals. To enter your goals into Paylocity click Create Goal in the My Goals section.



This will give you a section to add your goals one by one.

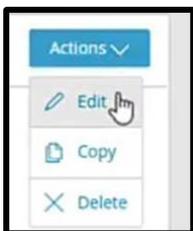
- **Select Format-** SMART/MBO
- **Goal Title-** Give a brief description of the goal, only a few words are needed here.
- **Goal Description-** Enter your SMART goal here.
- **Goal Period-** Select the year you are adding the goal for
- **Start Date-** Type in the first day of the calendar year (unless you started at Lifeworks mid-year).
- **End Date-** Type in the last day of the calendar year
- **Goal Category-** Leave this section blank.
- **Set Goal Measurements-** Select *Percentage*
- **Goal Weight-** Leave this section blank. This will be calculated during a future step.



Click save in the upper right corner to save each goal. Repeat this step until all goals have been entered into the system.

Updating Goal Status in Paylocity

After the goal has been created you can update the progress and status of your goal. Click on the goal you want to update and select actions followed by edit.



Move the percentage status bar to update your goal progress throughout the year. You can also add comments to the comment box followed by clicking save.



During the year, the goal status should be marked as active. Once the goal is successful, the status should be changed to attained. If the goal was not successful this would be changed to missed.



Resources

If you have any questions, email D365-HR@lifeworks.org

You can also reference the following training videos:

[Lifeworks SMART Goal Training](#)

[Performance Training for CORE Staff](#)

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Author	Joshua Mathiowetz	Revision Date	10/29/2025
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