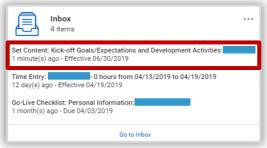
KICK-OFF GOALS/EXPECTATIONS AND DEVELOPMENT ACTIVITIES

The performance management process provides managers and employees a framework for engaging in regular communication throughout the year about goals/expectations, performance, and employee development. The process is meant to be flexible and interactive and begins with establishing clear expectations which is the foundation of successful performance. The Kick-off of the annual process begins with Goal/Expectation Setting.

Enter Initial Goals

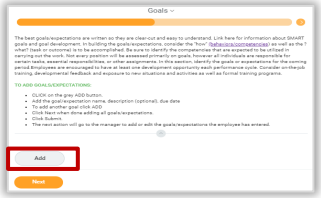
From the Workday homepage:

1. Navigate to your **Inbox**. Select the task **Set Content: Kick-off Goals / Expectations and Development Activities**.

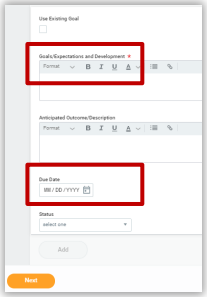


2. Select **Go to Guided Editor**.
   ***Note**: Do not select Go to Summary Editor. To begin again, click **Close** and re-select the **Inbox** item.*

3. From the Guided Editor, Click **Add** to enter a new goal.

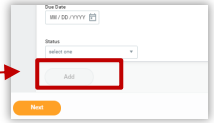


4. Enter the following goal information (apply SMART principals):



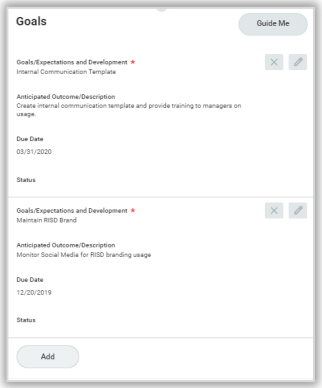
   a. **Goals/Expectations and Development***: Enter the goal or expectation actions(s) answering "what is being accomplished" (required)
   b. **Anticipated Outcome/Description**: Enter a description of the expected outcome (optional)
   c. **Due Date**: Enter a completion date for the goal
   d. **Status**: Select one: Not Started, In Progress, Completed, Delayed/Cancelled (optional)

5. To add more goals:
   a. Scroll to bottom of your goal entry
   b. Click **Add**

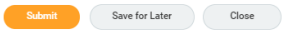


6. Once you have completed entry of all goals, click **Next**.
7. From **Set Review Content**, scroll down to review the goals you have entered.
   a. To use the system guide to edit your goals:
      Select

   b. To delete a goal: Click **Delete**
   c. To directly edit a goal: Click **Edit**
      - Modify the information as needed
      - Click **Save** or **Undo** to exit without saving changes



8. Select one of the following:



   - Submit: Save goals and route task to your manager for review and approval
   - Save for Later: Save your entry and exit editing goals
   - Close: Exit editing goals, the task will remain in your **Inbox**

WORKDAY +RISD

Review Manager Response

You will receive a task in your **Inbox** if the manager has added goals or returned them for revision.

1. Select the Inbox task.
2. Select **Continue Where I Left Off** to view the guided editor.
3. Scroll to the bottom to view the process history and review your manager's comments.
4. Scroll to view any goals added by your manager.
5. Complete any edits requested.
   Note**: remember to scroll to select **Add Add *as needed.*
6. Follow steps 4 through 7 from **Enter Initial Goals** on page 1 of this job aid
7. Select one of the following:

   Submit | Save for Later | Close

   - Submit: Indicates employee's action is successfully complete
   - Save for Later: Save your work in progress and exit editing goals
   - Close: Exit editing goals, the task will remain in your **Inbox**
8. Upon submission, your manager will schedule a meeting with you to review and finalize your goals.