GOAL MANAGEMENT PROCESS

Individual goals/expectations and development activities can be added and edited throughout the year and can be entered by an employee or their manager. If an employee enters and submits goals/expectations and development activities, the manager will receive an Inbox task to provide their approval. If a manager adds goals/expectations and development activities for an employee, the employee will receive a notification; however, no approval is required. *Note: The Manage Goals process should only be used **after** the Kick-Off Goals/Expectations and Development Activities process has been completed.*

The following actions will kick-off additional manager approvals/employee notifications:

- Adding a goal
- Deleting a goal
- Changing a goal name or description
- Updating the goal status
- Changing a due date

All **approved** goals will be available to include as part of your End-Of-Year Review.

Add Goal from the Workday Homepage

1. Click **View All Apps** on the Workday homepage.
2. Click the **Performance** application.
3. Click **Goals** in the *View* section.
4. Click the **Individual Goals** tab.
5. Click **Edit**.
6. Click **Add**.
7. Click in the **Goal** box to enter a goal name.
8. Click in the **Description** box to enter a description of the goal.
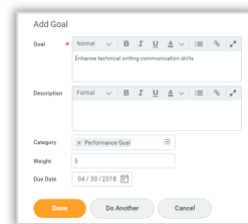
9. Click the **Status** box to select the goal status: **Not Started**, **In Progress**, **Completed**, **Delayed/Cancelled**
10. Select a **Due Date**.
11. If adding multiple goals/expectations and/or development activities, click **Add** to add a new goal. *Do not click Submit* until you have finished adding all desired goals/expectations.
12. Choose one of the following:

- **Submit**: Submit to your manager for review and approval. Your manager can send back your submission(s) for revision with comments. Complete any edits necessary and resubmit.

- **Save for Later**: Save the entry and send a notification to your **Inbox** to continue to **Revise Goals** at a later time. A note will be displayed on the goal noting that it has been **Saved for Later**.

- **Cancel**: Disregard the **Add** in progress and revert to the original goals list.
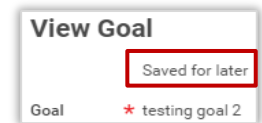
Edit Goal

Note: Submitted goals cannot be edited until any previously submitted changes are approved.

1. Select the **Performance** application from the Workday homepage.
2. Click **Goals** in the *View* section.
3. Click **Individual Goals** tab.
4. Click **Edit**.
5. Click the goal you wish to edit using the list on the left.
6. Click in the content box area to edit. Enter your new information.
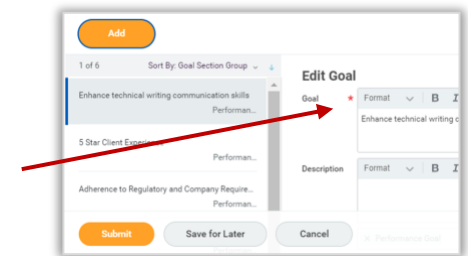
7. Choose one of the following:

    - **Submit**: Submit to your manager for review and approval. Your manager can send back your submission(s) for revision with comments. Complete any edits necessary and resubmit.

    - **Save for Later**: Save the entry and send a notification to your **Inbox** to continue to **Revise Goals** at a later time. A note will be displayed on the goal noting that it has been **Saved for Later**.

   - **Cancel**: Disregard the **Add** in progress and revert to the original goals list.

Sort and View Goals from your Homepage

1. Click **View All Apps**.

2. Click the **Performance** application.

3. Click **Goals** in the *View* section.

Performance

4. From the **Individual Goals** tab, use the **Sort By**: drop down list on the left to view your goals by characteristic:

    - Goal Section Group
    - Goal Workflow Status
    - Goal
    - Description
    - Status
    - Due Date
    - Completed On
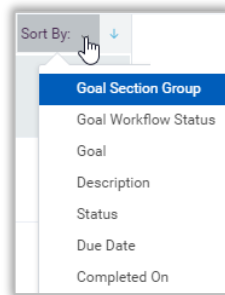
5. The **List Detail View** (view selection buttons on the top right) presents a view of a single goal with left hand navigation to toggle between goals. *This is the default view.*

    Change to **Grid View** using the view selection buttons on the top right to see all goals on one page.

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