

Performance: Goal Setting and Revision Manager/Employee



GOAL SETTING

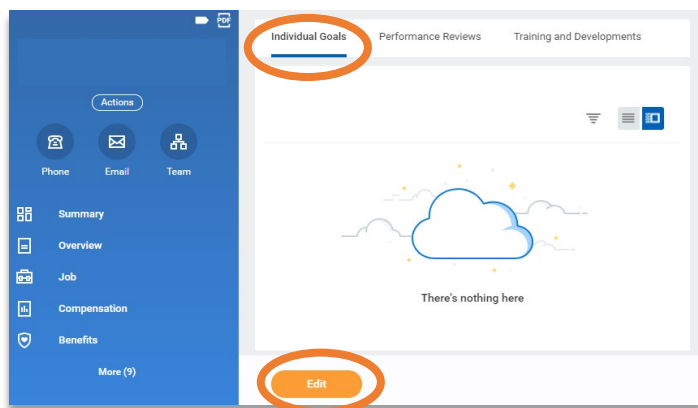
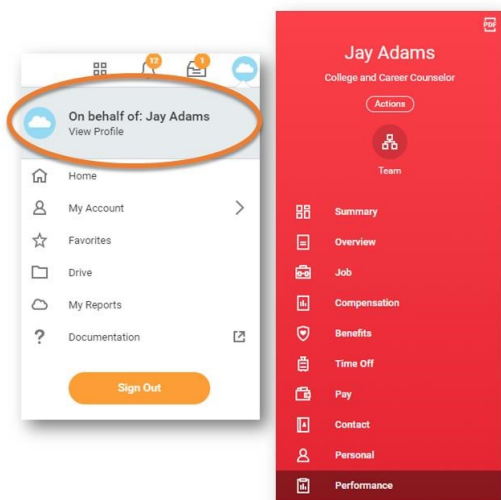
Goals may be created or edited outside of the 90-day and annual performance review process. Goals may be created or edited by the employee or manager.

EMPLOYEE: VIEW, EDIT, OR ADD GOAL

From the **Home** page:

Click the cloud and select **View Profile**.

1. Select **Performance** (you may need to click **More**).
2. Click **Edit** under **Individual Goals**.

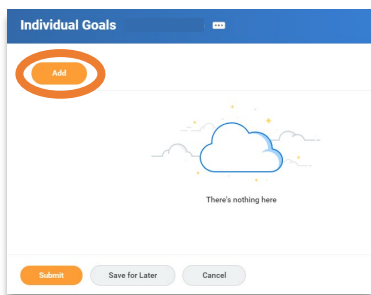


Your screens and processes may vary from this document. 1

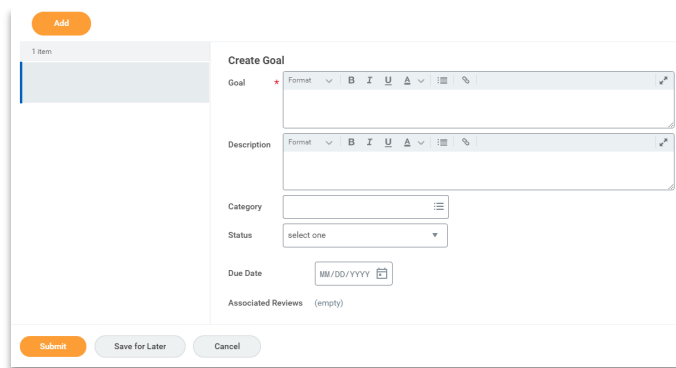
Performance: Goal Setting and Revision Manager/Employee



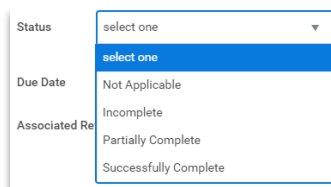
- From here, you can add or edit a goal.



- To add a goal, click **Add**. Enter the goal summary in the **Goal** text box. Provide additional details under **Description**, if needed. Determine the goal **Due Date**. Select the appropriate faculty or staff goal **Category**. **Do not enter a Status**. Click **Submit**. **If a goal is added or edited, it will route to the manager for approval.** *Note: Ensure that goals are specific, measurable, achievable, relevant, and time-bound.*



- You can also log in to update the status of an assigned goal to identify if it is in progress or has been completed.



Your screens and processes may vary from this document. 2

Performance: Goal Setting and Revision Manager/Employee



MANAGER: APPROVE, DENY, OR SEND BACK A GOAL

From the **Home** page:

1. Launch the item from your **Inbox**.
2. Approve, send back, or deny the goal addition or change.

MANAGER: VIEW, EDIT, OR ADD GOAL

From the **Home** page:

1. Click **My Team** under **Applications**.
2. Select the **employee's name**.
3. Click **Performance**.
4. Click the **Goals** tab.
5. Click **Edit**.
6. To add a goal, click **Add** and complete fields. Click **Submit**.

The image displays three screenshots from the Workday Performance interface. The top-left screenshot shows the 'Applications' menu with 'My Team' circled in orange. The top-right screenshot shows the 'Individual Goals' page with a 'There's nothing here' message and an 'Edit' button circled in orange. The bottom screenshot shows the 'Create Goal' form with fields for Goal, Description, Category, Status, and Due Date, and buttons for 'Submit', 'Save for Later', and 'Cancel'.

Your screens and processes may vary
from this document. 3