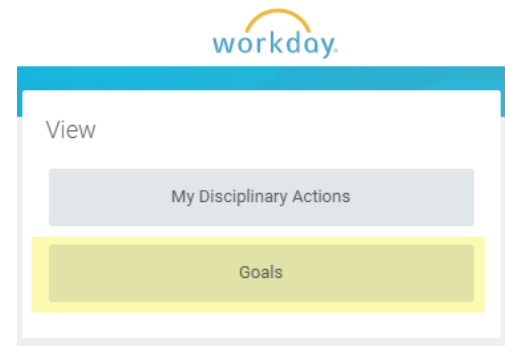
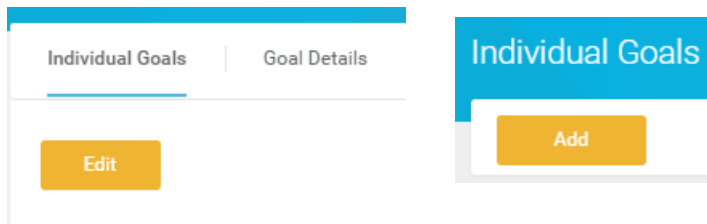


Tip sheet: Goal Creation – Employee

From your home Dashboard:

- Click on the **Performance** Worklet and select **Goals**.
- Click the **Edit** button, followed by the Add button to add a new goal.



This will open a new screen where you will be given the goal entry fields. Begin to enter the required information by entering a **Goal**. A **Description** of the Goal is optional.

Next you will need to enter a **Category** by clicking on the **Prompt** icon to the right of the input box. Select either Performance or Development. **Note: Everyone must identify at least one Performance Goal.**

Add a **Weight** for this goal. The weight can be from 0 to 100. Do not use the percent sign. All Goals must add up to 100. **Note: There is no error message if the goals do not add up to 100, but you will be required to correct this during the annual review cycle.**

Add a **Status**. Click the down arrow icon in the box to see a list of goal status options to select from. A Status is not required.

Add a **Due Date**. The date must be within the calendar year to be included in that year's Performance Review. A Due Date is **required**. If no date is entered, you will receive an error message to fix it before you can continue.

When you are finished, click the orange **Done** button at the bottom. If you are adding more than one goal, you can select **Do Another** and repeat the steps above. When you have finished, click the green **Submit** button to submit your goal(s) to your manager for approval.

Add Goal

Goal *

Description

Category

Status

Weight

Due Date

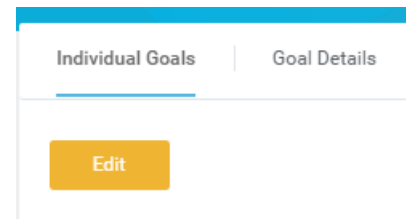
Associated Reviews (empty)

Done Do Another Cancel

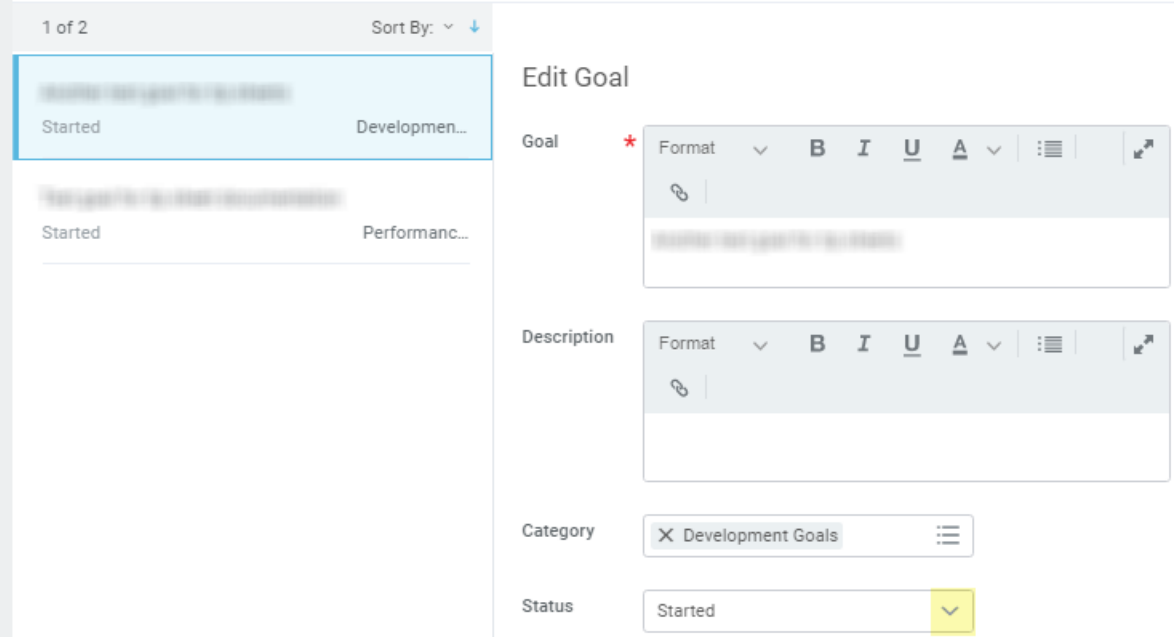
Goal Maintenance Throughout the Year:

It is important that both the Manager and Employee maintain the Goals throughout the year. Goals may be added or modified at any time. Some goals may be updated or delayed. To receive an accurate Performance Review, the Goals must be maintained.

Navigate back to your Goals screen and click the **Edit** button to open the screens for the goal you would like to edit.



Click on the **Edit** icon to the right of the goals to open the screens. From there you can make changes to the goal details.



The screenshot displays the 'Edit Goal' form. On the left, a list of goals is shown, with the first one selected. The main form area contains the following fields:

- Goal:** A text input field with a rich text editor toolbar (Format, Bold, Italic, Underline, Text Color, Bulleted List, Link, Unlink).
- Description:** A text input field with a rich text editor toolbar (Format, Bold, Italic, Underline, Text Color, Bulleted List, Link, Unlink).
- Category:** A dropdown menu currently set to 'Development Goals'.
- Status:** A dropdown menu currently set to 'Started'.

If you would like to update your goal **Status**, select the status box and click the **drop down arrow** to bring up a list of completion statuses to select from. Once you have made your status selection, click the **Done** checkmark button.

When you have finished this task, click the green **Submit** button. This will submit the modified goal to your manager for approval. Click the orange **Done** button to close out the task.

Activity Stream Feature:

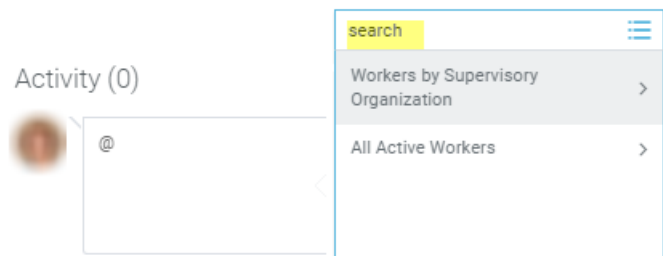
Workday has incorporated a feature in the Goal Setting process giving you the added ability to write “notes” attached to the goals. This feature is called an **Activity Stream**.

The **Activity Stream** can be opened by clicking on the icon that looks like a conversation bubble.



This will open a field for you to select who you would like to direct your note to. Type “@” to open a field to enter your supervisor’s name.

Workday will search and find your supervisor and open a window for your comments.



When you are finished adding your comments, click the orange **Post** button.

Any notes posted to the **Activity Stream** will be viewable by your manager the next time they look at the goal. At that time, your manager can go to your goal and add additional Activity Stream postings. The dialogue will show up resembling a chat listing.

You have the option to include employees in your supervisory organization or Human Resources in the **Activity Stream**. This could be your direct supervisor, your next level up supervisor, or your HR Rep. You add them to the activity stream by typing “@” and searching for them by name.

Note: The employee you have included will receive a notification of the new activity. They will click the link in the **Comment Notification** to be taken to the Activity Stream.