Overview

This job guide outlines the steps for an employee to Add and Edit Goals for Performance Review in Workday.

Prerequisites:

- None.

Important Information:

For the goals to show in the performance evaluation:

- Goals must be approved by the employee's manager.
- The goal due date must be between 4/1/2019 and 3/31/2020.

Add Goals

<table>
<thead>
<tr>
<th>Step</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the Workday home page, click the <strong>Performance</strong> Worklet.</td>
<td><img src="image" alt="Screenshot" /></td>
</tr>
</tbody>
</table>

Note: The Applications screen is customizable, so the order in which the worklets display may vary.
### Step: 2. Click **Goals** in the View item list.

<table>
<thead>
<tr>
<th>Screenshot:</th>
</tr>
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<tbody>
<tr>
<td><img src="https://via.placeholder.com/150" alt="View" /></td>
</tr>
</tbody>
</table>

### Step: 3. Any goals already assigned to you will be displayed; otherwise, you will see the message “There's nothing here.”

<table>
<thead>
<tr>
<th>Screenshot:</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Goals" /></td>
</tr>
</tbody>
</table>

### Step: 4. To add a goal, click the **Edit** button in the lower left corner.

<table>
<thead>
<tr>
<th>Screenshot:</th>
</tr>
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<tbody>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Edit" /></td>
</tr>
</tbody>
</table>
### Step:

5. Click the Add button and complete the following fields:

- Goal
- Description
- Status (e.g., Discontinued, Not Started, In Progress, Complete)
- Due Date

<table>
<thead>
<tr>
<th>Screenshot:</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Individual Goals" /></td>
</tr>
</tbody>
</table>

6. Click **Add** to add an additional goal, or click **Submit** to finish adding the goal and complete the process.

**Note:** Selecting a status of “Complete” will display a Completed On field. Enter the date the goal was completed in this field.

<table>
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<th>Screenshot:</th>
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<tbody>
<tr>
<td><img src="image" alt="Individual Goals" /></td>
</tr>
</tbody>
</table>
### Step 7:
Goals will route to the employee's manager for approval.

**Note:** The Due Date in this screen is assigned by Workday and may not coincide with the due dates set by Texas A&M University for the Performance Management review period.

### Step 8:
Once the goal has been approved by the manager, the employee will receive a To-Do item in their Workday Inbox to Review Goals.

To review goals, repeat steps 1-2 to view your goal(s), then return to your Inbox and Submit this task.

This completes the employee Add Goals process.
**Edit Goals**

**Step:**

1. From the Workday homepage, click the Performance Worklet.

**Screenprint:**

![Screenprint of Workday interface](image)

2. Click Goals in the View item list.

**Screenprint:**

![Screenprint of Workday interface](image)

3. Click Edit in the bottom left corner.

**Note:** Goals must be approved by your manager for the Edit feature to be active. If the goal has not yet been approved, it will say (Pending approval).
Job Guide: Add and Edit Goals (Employee)

Step:

4. Click the desired goal to edit from the list of goals. Make any desired changes to the following fields:

   - Goal
   - Description
   - Status
   - Due Date

5. Click Submit in the lower left corner.
<table>
<thead>
<tr>
<th>Step:</th>
<th>Screenprint:</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Edited goals will route to your manager for approval. This ends the employee Edit Goals process.</td>
</tr>
</tbody>
</table>

You have submitted
Manage Goals: (Virtual) Eli Ramos - 10

Up Next
(Virtual) Jessika Batchelor
Review Goals
Due Date: 03/01/2020

Details and Process

Do Another
Archive Goals

Done