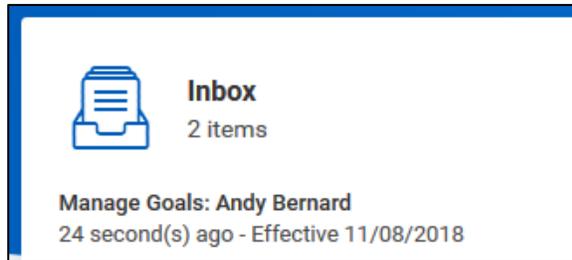


Manage Individual Goals

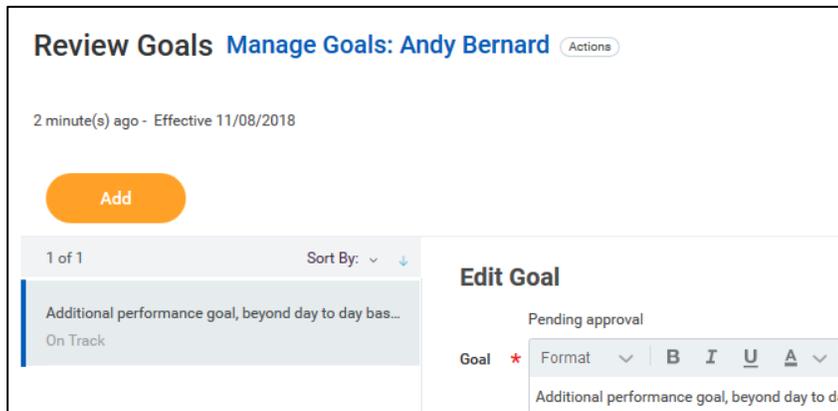
In Workday, the annual goal-setting process is kicked off through the Self Evaluation: Goal Template. However, employees may also add, edit and remove individual goals throughout the year on an ad hoc basis. Any time your direct reports make **any edits** to their goals (updating existing, adding new, etc.) you will receive an action item to review and approve the change. The action item will come to your Workday Inbox and Outlook Inbox titled **Manage Goals: Employee Name**.

1. To get started, go to your Workday Inbox and select the action item titled **Manage Goals**.



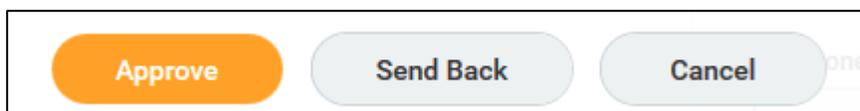
Review Goals

The Review Goals action item will show all the goals that your employee has changed in any way – including updates to previously approved goals or addition of new goals. The action will not show you what specific details have changed, so be sure to review each goal in its entirety and any comments made by your employee when the process was submitted to you for review.



2. Review the goal descriptions, weighting and other details and make edits as necessary to the following:
 - a. **Goal:** You may add/edit the goal description.
 - b. **Status:** You may edit the status. If this is a newly added goal, be sure it reflects **Not Started**.
 - c. **Supports:** You may add/edit which higher level goal your employee chose to link for each goal.
 - d. **Weight:** Ensure the weightings your employee selected align with your discussions and expectations.
 - e. **Due Date:** You may add/edit the goal due date.
 - f. **Associated Reviews:** Although you cannot edit this field, note that any goals entered as part of the annual goal-setting process will show Goal Template. Any goals your employee adds on an ad hoc basis throughout the year will not show any associated reviews.

- g. Milestones:** Milestones are action items to help your employee meet their overall goal. You can:
- **Edit** existing milestones by clicking directly in each field. For example, you can update the status from **Not Started** to **On Track** or **Completed**.
 - **Add** new milestones by clicking the plus sign. Once you do, you can enter a description of the **Milestone**, **Due Date** and **Status**.
 - **Delete** existing milestones by clicking the minus sign.
- 3.** Once you've reviewed, you can click one of the following options:
- Approve** to finalize the goals with your edits. The goals you edited/entered as the manager will be reflected on the employee's worker profile.
 - Send Back** to the employee to make additional edits. You'll be prompted to include a comment of why you are sending it back and what they should edit.
 - Save for Later** to come back to it in your inbox at any time.



Note: Once you submit, your employee's goals are automatically updated on their profile. They do not receive any follow-up review steps. The employee does, however, receive a notification that their manager has approved or edited their goals and to review their worker profile to note any changes. Please discuss with your employees any changes you may have made to their goal template.