WORKDAY: ADD, EDIT AND APPROVE GOALS FOR PERFORMANCE REVIEW (MANAGER)

Overview: This job aid outlines the steps for a manager to add, edit and approve goals as part of the performance review process in Workday.

Prerequisites: None

Important Information:
- For the goals to show in the evaluation:
  - The goal due date must be between 9/1/2020 and 8/31/2021
  - Goals added by Employees must be approved by the Manager
- Goals added by the Manager are automatically approved
- Managers can edit goals for their direct reports
- Goals must be approved by the Manager to be edited by the Employee

Add Goals (Manager):

1. From the Workday Home page, click the Team Performance Worklet.

The Team Performance dashboard may take a minute to load. A blue loading bar will display at the bottom of the screen until the page is fully loaded.
2. In the **Actions** menu, click **Add Goal to Employees**.

3. Decide if you are creating a new goal, or if you want to copy an existing goal.

   **Create New Goal** will allow you to create a goal once you select the Employee(s) you are assigning the goal to.

   **Copy Existing Goal** will allow you to copy a goal from your own goals, or from someone who reports to you.
4. Decide who to assign the goal(s) to: specific Employees or an entire Organization.

*Click in the Employees search box to search employees in your team, workers by a manager, workers by a manager hierarchy, or workers by supervisory organization hierarchy.*

**Tip:** It may be faster to type an employee name or supervisory organization in the search bar rather than use the drop down menu.
5. After selecting the Employee(s) or Organization(s) to add goals, click OK in the bottom left corner.

6. Enter the Goal, Description and Due Date. Then determine whether or not you want to be able to edit the goal.

**Assign To:** number of employees you selected to assign the goal (this is a hyperlink you can click on to view the employees the goal will be assigned to)

**Goal:** Enter the Goal

**Description:** Enter the Goal Description

**Due Date:** Enter the Due Date (the due date must be in the performance review period –