# Workday

# **Performance Goals and Evaluations**

- <u>Create/Edit SMART Goals</u>
- Verify Goal Submission
- <u>Self-Evaluations</u>
- Archiving Old Goals

# Learner Enrollment

- <u>Workday Homepage</u>
- Learning App
- Learner Self-Drop

# Create/Edit SMART Goals

1. In Workday, enter *My Goals* into the global search bar.

≡ м	Nebraska		Q My Goals	$\otimes$
Д	Saved Categories	~	Tasks and Reports	
	People	0	My Goals	
	Tasks and Reports	3	Report View your personal and organization goals. Enables you to add or edit goals and link goals.	Need Help? Browse resources and common
	Articles	0	My Individual Goals Task	questions to get what you need. <u>Visit Help Center</u> →
:=	More Categories	>	View My Goal Alignment Report View one of your goals and the organization goals to which it is aligned. Required Prompt: Review Goal Optional Prompt: none	

2. Your currently entered goals will appear on the page. Select Edit to edit or add new goal

Individual G	Goals Development Items	Organization Goals	Archived Goals							
8 items	Goal Section								Completed	Associated
	Group Goal	Description			Category	Status	Weight	Due Date	On	Reviews
Ģ					Annual Performance Goal	Not Started	12.5	2023		- 1
Ģ					Annual Performance Goal	Not Started	12.5	/2023		
Ģ					Annual Performance Goal	Not Started	12.5	2023		
Ģ					Annual Performance Goal	Not Started	12.5	2023		
Ģ					Annual Performance Goal	Not Started	12.5	2023		
Ģ					Annual Performance Goal	Not Started	12.5	023		
					Annual Performance Goal	Not Started	12 5	2023		
Edit					 Annual Performance Goal	Not Started				

- 3. To add new goals, click the Add button.
- 4. Enter Create Goal fields:
  - a. **Goal**: Enter goal title or statement.
  - b. **Description**: Enter description, as needed.
  - c. Category: Select Annual Performance Goal.
  - d. Weight: Enter the goal weight (1-100). NOTE: The sum of all goals must equal 100.
  - e. **Due Date**: Enter due date associated with the goal.

**NOTE**: Both the **Category** and **Due Date** fields are required for the goal to be included in the performance review.

Goal *	Normal V B I U A V E	2
	Demonstrate how an employee can create SMART goals in Workday	
Description	Format         ∨         B         I         U         A         ∨         I </td <td>2</td>	2
	<ul> <li>Document the steps on how an employee can create SMART goals in Workday</li> <li>Explain fields that need to be filled out</li> <li>Emphasis on the importance of filling in both the Category field and the Due Date field. This will allow them to be included in the annual performance review</li> </ul>	
Category	× Annual Performance Goal … 🗄	
Status	In Progress	
Weight	25	
Due Date	12/31/202	

- 5. To add additional goals, click the Add button.
- 6. Once the goals have been added, click **Submit** to finalize the goal creation process.

Goals will be sent to your supervisors Workday Inbox for review for approval. You will be unable to edit the goals again until they have been reviewed by your supervisor.

## Verify Goal Submission

To verify that you have successfully submitted,

1. Click **Menu** in the top left corner of the page, then select the **Performance** app.

Apps		×
Your Save	d Order	( <b>†</b> )
2	My Account	^
8	Benefits	
	Jobs Hub - Internal Apply	
	Learning	
Ø	Learning Trainer	
	Performance	

#### 2. Select Goals.

View	Actions			
Goals	Get Feedback on Self			
Reviews				
Skills and Experience				
Individual Goal Alignment				
	orkday			
© 2024 Workday, Inc. All rights reserved. System Status: Your system will be unavailable for a maximum of 3 hours during the next Weekly Service Update; starting on				
	ntil Saturday, February 10, 2024 at 2:00 AM PST (GMT-8).			

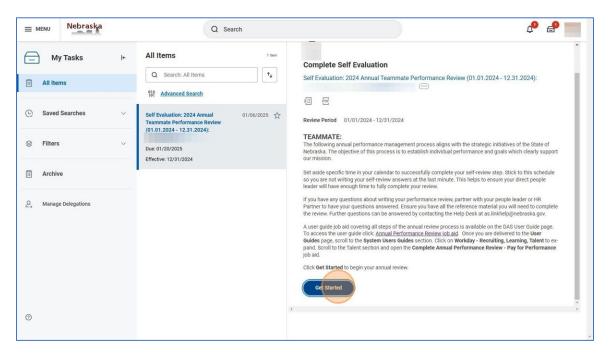
You also view your goals by selecting your picture in the top right corner of the page  $\rightarrow$  View **Profile**  $\rightarrow$  **Performance**  $\rightarrow$  **Individual Goals**.

## Self-Evaluations

1. On your Workday homepage, click the **Self Evaluation** task in the **Awaiting Your Action** inbox.

≡ menu	Nebraska	Q Search		¢° 🗗 📰
	Good Morning, Awaiting Your Action Self Evaluation My Tasks - 25 DUE 01/20/20	1 on: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31.2024): second(s) ago	It's Monday, January 6, 20 Your Top Apps Benefits State of the second	
	Go to My Tasks.(1)	Here's where you'll get updates on your active items.	Learning	

#### 2. Click Get Started



3. On the *Teammate Self-Evaluation* page, enter your answers for the Competency questions.

Complete Self Evaluation	When respons ponsibility.
Self Evaluation: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31 (Actions) 01/01/2024 - 12/31/2024 (Communication Description Descripti Description Description Description Descripti	Teamwork: Approaches work with the intent to cooperate and collaborate. Values the contributions of every stakeholder and works effectively with others, creating a positive and productive culture.     Collaborates with others through trust and openness.     Accepts different avenues to accomplish the same goals.     Creates positive team atmosphere with supportive actions, volunteers information, and cooperatively participates with others.     Recognizes the values and contributions of team members and others.     Determine important day-to-day activities and duties.     Plan and manage day-to-day activities and duties.     Needs little to no assistance from their people leader
Teaninate Sen-Evaluation	· · · · · · · · · · · · · · · · · · ·
Teammate Competencies     Teammate Smart Goals     Attachments     Indirect People Leader     Comments     Overall Rating Summary	Question What is one of your top two competencies as a Teammate, and why do you believe this? Employee Answer * Normal ~ B Z V ~ := %
Review and Submit	Question       What is your other top competency as a teammate, and why do you believe this?         Employee         Answer *       Format       >       B       I       U       A       >       III       %       #*
	Back Next E Save Close

4. When you have entered all your answers, click Next

competencies	
mart Goals	
S	Question Do I have the necessary tools to do my job?
ple Leader	Employee
	Answer * Normal V B I U A V III %
ng Summary	
Submit	
	Back Next Save Close

5. On the *Teammate Competencies* page, enter your responses for each Competency.

additional information pertaining to each provide will assist your people leader as t Once finished, click <b>Next</b> , to proceed to th	competency. This action is not required however hey enter ratings and comments in your review.	e competencies. Comment boxes are available for you to enter you are strongly encouraged to do so. Any information you can	
In this section your people leader will be r additional information pertaining to each provide will assist your people leader as t Once finished, click <b>Next</b> , to proceed to th	competency. This action is not required however hey enter ratings and comments in your review. In Teammate SMART Goal section.		
additional information pertaining to each provide will assist your people leader as t Once finished, click <b>Next</b> , to proceed to th	competency. This action is not required however hey enter ratings and comments in your review. In Teammate SMART Goal section.		
5 items			
Competency	Description	Employee Evaluation	-
Accountable and Dependable	Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable	Comment	
	attendance.		
	of position including		
	<ul> <li>Takes steps to resolve issues or errors in work.</li> <li>Adheres to policies regarding work schedule and leave time.</li> <li>Portrays dependability, including regular and reliable attendance.</li> </ul>		
Adaptability	Demonstrates a high degree of	Comment	
	Accountable and Dependable	Accountable and Dependable Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable attendance. Demonstrates knowledge of position including deadlines. Takes steps to resolve issues or errors in work. Adheres to policies regularity, including regularity,	Accountable and Dependable Takes responsibility for own conduct and adheres to policies and procedures. Portray dependability, including regular and reliable attendance. Demonstrates knowledge of position including deadlines. Takes steps to reacive issues or entrol is work. Adhere to policies of and law the of and law the policies of and la

6. Once you have entered all your responses, click Next

ompetencies	goals. • Creates positive team
mart Goals	atmosphere with supportive actions, volunteers information, and cooperatively participates with others. • Recognizes the values and
ble Leader	contributions of team members and others. • Determine important day- to-day activities and duties. • Plan and manage day-to-
g Summary	day activities and duties.  • Needs little to no
Submit	assistance from their people leader
	Back Next 🗄 Save Close

7. On the *Teammate Smart Goals* page, confirm that all your SMART goals for the year are present and the weights add up to 100. Then enter your comments following each goal.

8. When you have entered all your comments, click Next

	Employee
e Smart Goals	Comment Format V B I U A V III &
nts	
eople Leader	
S	> History
ting Summary	
nd Submit	
	Back Next Save Close

9. On the *Attachments* page, you may upload any supporting documentation regarding your performance throughout the year. Once you have uploaded your attachments, or if you do not wish to upload any attachments, click **Next** 

Complete Self Evaluation	
Self Evaluation: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31	Attachments
Actions	TEAMMATE:
01/01/2024 - 12/31/2024	In this section please add any attachments which you feel best support your overall effort during the performance review period. Including attachments are no required but help provide a complete picture of your performance to your direct people leader.
8	Enter any comments related to the specific attachment in the corresponding text boxes.
Teammate Self-Evaluation	Also a comment box for overall comments pertaining to all attachments is available to you. It is not required but any summary information you feel important share in relation to the attachments is available.
Teammate Competencies	Click Next to proceed.
Ţ	·
O Teammate Smart Goals	
Attachments	Employee
Indirect People Leader Comments	Drop files here
Overall Rating Summary	
Ţ · ·	Select files
Review and Submit	
	Employee Summary
	Comment Format ∨ B I U A ∨ i≣ %
	Back Next Close

10. There is nothing you need to do on the Indirect People Leader Comments page. Click Next

Complete Self Evaluation	
Self Evaluation: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31	Indirect People Leader Comments
(Actions) 01/01/2024 - 12/31/2024	TEAMMATE: This section is where any comments entered by your indirect People Leader will appear. No Action is required of you. Please click Next to proceed.
•	
Teammate Self-Evaluation	Question Indirect People Leader Comments
Teammate Competencies	
Teammate Smart Goals	
Attachments	
Indirect People Leader     Comments	
Overall Rating Summary	
Review and Submit	
	Back Next E Save Close

11. On the **Overall Rating Summary** page, enter any overall comments you have regarding your performance throughout the year. Once finished, click **Next** 

Complete Self Evaluation  + Self Evaluation: 2024 Annual Teammate Performance Review (01.01.2024 - 12.31 (Artione) 01/01/2024 - 12/31/2024 Teammate Self-Evaluation Teammate Self-Evaluation Teammate Competencies Teammate Smart Goals Attachments Indirect People Leader Comments Overall Rating Summary Review and Submit	Overall Rating Summary         TEAMMATE:         This section will eventually display your overall rating score once completed by your direct people leader. Use the comment box to share any additional inform or thoughts which you feel important to include. This action is not required but storingly encouraged.         Click Next.         Comment         Normal       >         I       I         I<
	Back Next 🖾 Save Close

12. On the *Review and Submit* page, review all your comments and confirm it all looks correct.

		ucounito.			
Complete Self Evaluation I* Self Evaluation: 2024 Annual Tearmate Performance Review (01.01.2024 - 12.31		<ul> <li>Takes stips to resolve issue or enrors in work;</li> <li>Adheres to policies reparing work schedule and leave time.</li> <li>Portrays dependability, including regular and reliable attendance.</li> </ul>			•
101/01/2024 - 12/31/2024      Teammate Self-Evaluation     Teammate Competencies     Teammate Smart Goals	Adaptability	Demonstrates a high degree of adaptability to change and focus on progress. Initides innovative improvements both in reaction to change and in anticipation of shifting customer need, business process and priorities, or available resources. • Facilitates change. • Adjusts to change in • Adapts to change in	Comment		
Attachments					
Overall Rating Summary	Teammate Smart Goals			<b>祖</b> 歴	
I					
Review and Submit	Goal				
	Description				
	Submit Save for Later				•

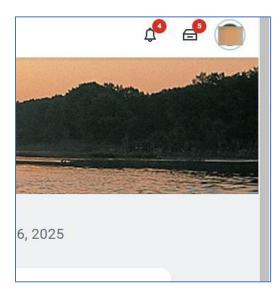
13. Click **Submit** to send your evaluation to the next step. You may save for later if you need to pause and return to the evaluation at a later time.

\*Note: do not enter your comments in the comment box with an X below. This comment box is a Workday process comment box and any comment entered there will not appear on your evaluation.

01/01/2024 - 12/31/2024	
Teammate Self-Evaluation Teammate Competencies Teammate Smart Goals	Overall Rating Summary Employee Comment
Attachments	
Indirect People Leader Comments	enter your comment
Overall Rating Summary	
Review and Submit	Due 01/20/2025
	Complete Self Evaluation for Performance Review - Awaiting Action
	Submit Save for Later

# Archiving Old Goals

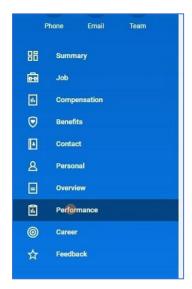
- 1. Go to your Workday homepage
- 2. Click on your picture in the top right corner of the screen



3. Click View Profile

			1
		View Profile	
nuary 6	ធ	Home	
	8	My Account	>
ates	☆	Favorites	
o importa	0	My Reports	
	?	Documentation	ß
	~	Help	57

## 4. Click Performance



5. Click Archived Goals

		Individual Goals	Performance Reviews	Competencies	Archived Goals
	Actions				
Phone	Email Team				
88 Sumr	mary				
dot வ					
🔟 Comp	pensation				
🗑 Benel	fits				
Conta	act				
A Perso	onal				
Overv	view				
🖬 Perfo	ormance				
Caree	er				
☆ Feed	back				

#### 6. Click Archive Goals

		Individual Goals	Performance Reviews Competencies	Archived Goals	
		Archived Goals 0 ite	ems		A = T .
		Goal	Goal Category	Status	Associated Reviews
				No items available.	
	Actions				
	<u>8</u> ⊠ &				
	Phone Email Team				
問	Summary				
ē	Job				
•	Compensation				
۲	Benefits				
	Contact				
ළ	Personal				
	Overview				
	Performance				
0	Career				
☆	Feedback	Archive Goals	)		
		Archive Goals			

7. Select the goals you'd like to archive. Ensure they are old goals that have appeared on a previous performance evaluation. You cannot archive goals that are part of an in-process performance evaluation. You should not archive goals that you are currently being evaluated on or will soon be evaluated on (for example, do not archive your 2025 goals in

2025. Wait until after your 2025 performance evaluation has been completed or your evaluation will not have your SMART goals on it).

elect All [					
ctive 9 items					
Archive	Goal	Category	Status	Completed On	Associated Reviews
		Annual Performance Goal	Not Started		
-		Annual Performance Goal	Not Started		2024 Annual People Leader Performance Review 01.01.2024 - 12.31.2024
	<u>)</u>	Annual Performance Goal	Completed	12/29/2023	2023 Annual People Leader Performance Review (01.01.2023 - 12.31.2023)
		Annual Performance Goal	Not Started		
		Annual Performance Goal	Not Started		2024 Annual People Leader Performance Review 01.01.2024 - 12.31.2024
		Annual Performance Goal	Completed	12/29/2023	2023 Annual People Leader Performance Review (01.01.2023 - 12.31.2023)
		Annual Performance Goal	Not Started		
		Annual Performance Goal	Not Started		2024 Annual People Leader Performance Review 01.01.2024 - 12.31.2024
		Annual Performance Goal	Completed	12/29/2023	2023 Annual People Leader Performance Review (01.01.2023 - 12.31.2023)

8. Click "OK"

		A	nnual Performance Goal	Not Started
			nnual Performance Goal	Completed
			andar enormance obai	Completed
		Α	nnual Performance Goal	Not Started
		A	nnual Performance Goal	Not Started
		A	nnual Performance Goal	Completed
Select All				
	Cool	Delatas To	Catagoni	Otatua
Unarabira				Litatila

9. This request will now go to your direct supervisor for approval

a Z	Individual Goals	You have su Up Next: 01/08/2025 <u>View Details</u>	Review Goals   Due D	ate
	Archived Goals 3 it	ems	Goal Category	Status
	- (Pending	Approval)	Annual Performance Goal	Completed
品	Approval)	- (Pending	Annual Performance Goal	Completed
eam	Approval)	- (Pending	Annual Performance Goal	Completed

10. The goals will remain on your Individual Goals list until the archival is approved by your supervisor.

Individual Goals	Per	formance Reviews	Competencies
9 items	Goal Section Group	Goal	Description
P		(Pending archival)	

You can unarchive goals by following the same process. You won't be able to unarchive goals until the initial archival request is approved or denied by your supervisor.

# Workday Homepage

When you login to Workday, you will see the Workday homepage. There are three main components of the homepage:

- Awaiting Your Action
- Timely Suggestions
- Your Top Apps

≡ menu	Nebraska	Q Search			¢	
	L			*		
	Let's Get Starte	d	It's Frid	day, December 29, 2023		
	Awaiting Your Action		You	r Top Apps		
		You're all caught up on your tasks.	6	My Account		
	Timely Suggestions		Ca	Learning		
	Timely Suggestions	Here's where you'll get updates on your active items.	ď	Performance		

To change the order of Your Top Apps,

- 1. Click the Menu icon at the top left of the screen.
- 2. The menu dropdown will appear with all the Workday apps accessible to you. Click the Edit button at the bottom of the dropdown.
- 3. Select the desired app and drag/drop the app(s) in the order you wish for them to appear in the menu. The top 4 apps from the menu will appear under the Your Top Apps section of the homepage.
- Overview
- Performance
  - o Individual Goals
  - Performance Reviews
  - Competencies
  - o Archived Goals
- Career
  - Certifications
  - Learning
  - o Training

# Learning App

Text

- Required for You slider
- Continue Learning slider
- Browse Learning Content

## Drop, Waive or Cancel Enrollments

### Learner Self-Drop

Learners can self-drop from self-enrolled courses with no approval process intervention.

