

Workday

Performance Goals and Evaluations

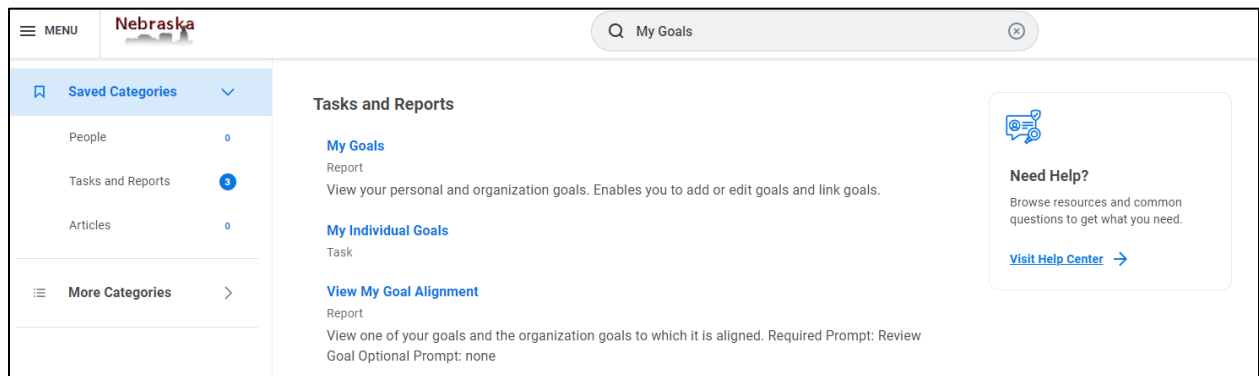
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Learner Enrollment

- [Workday Homepage](#)
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Create/Edit SMART Goals

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



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

The screenshot shows a web interface for managing goals. At the top, there are tabs for 'Individual Goals', 'Development Items', 'Organization Goals', and 'Archived Goals'. Below the tabs, there is a table with 8 items. The table has the following columns: Goal, Description, Category, Status, Weight, Due Date, Completed On, and Associated Reviews. The data in the table is as follows:

Goal	Description	Category	Status	Weight	Due Date	Completed On	Associated Reviews
		Annual Performance Goal	Not Started	12.5	2023		
		Annual Performance Goal	Not Started	12.5	/2023		
		Annual Performance Goal	Not Started	12.5	2023		
		Annual Performance Goal	Not Started	12.5	2023		
		Annual Performance Goal	Not Started	12.5	2023		
		Annual Performance Goal	Not Started	12.5	2023		
		Annual Performance Goal	Not Started	12.5	2023		

An 'Add' button is located at the bottom left of the table.

3. To add new goals, click the **Add** button.

4. Enter **Create Goal** fields:

- Goal:** Enter goal title or statement.
- Description:** Enter description, as needed.
- Category:** Select **Annual Performance Goal**.
- Weight:** Enter the goal weight (1-100). **NOTE:** The sum of all goals must equal 100.
- 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.

Create Goal

Goal * Normal **B** **I** **U** **A** **:** **☰** **🔗**

Demonstrate how an employee can create SMART goals in Workday

Description Format **B** **I** **U** **A** **:** **☰** **🔗**

- Document the steps on how an employee can create SMART goals in Workday
- Explain fields that need to be filled out
- 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

Category **×** Annual Performance Goal **☰**

Status In Progress **▼**

Weight 25

Due Date 12/31/2022 **📅**

Associated Reviews (empty)

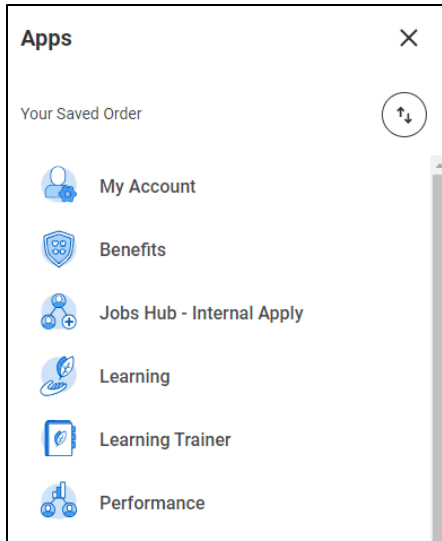
5. To add additional goals, click the **Add** button.
6. Once the goals have been added, click **Submit** to finalize the goal creation process.

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.

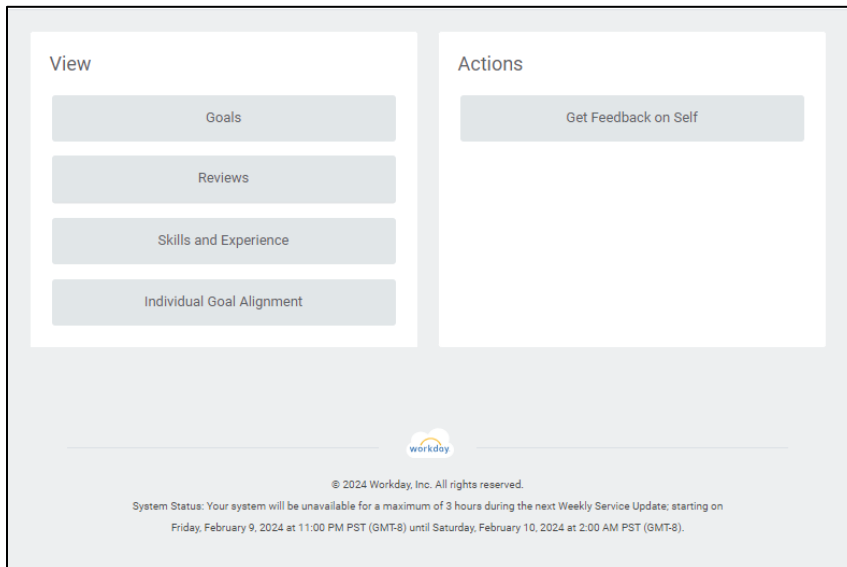
Verify Goal Submission

To verify that you have successfully submitted,

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



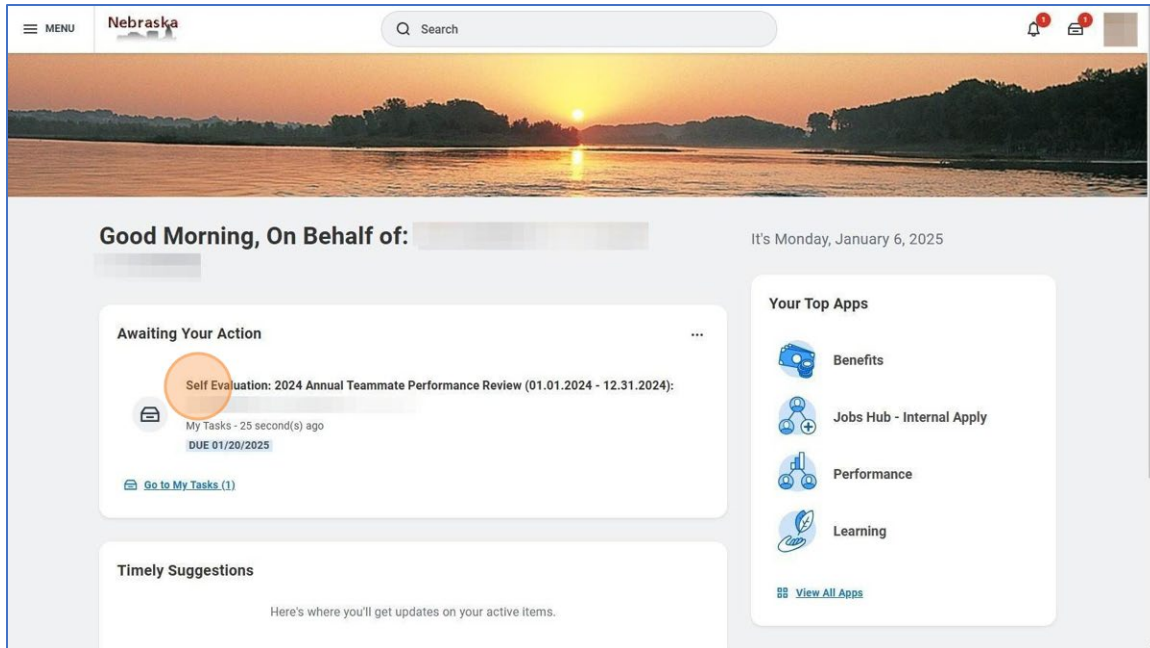
2. Select **Goals**.



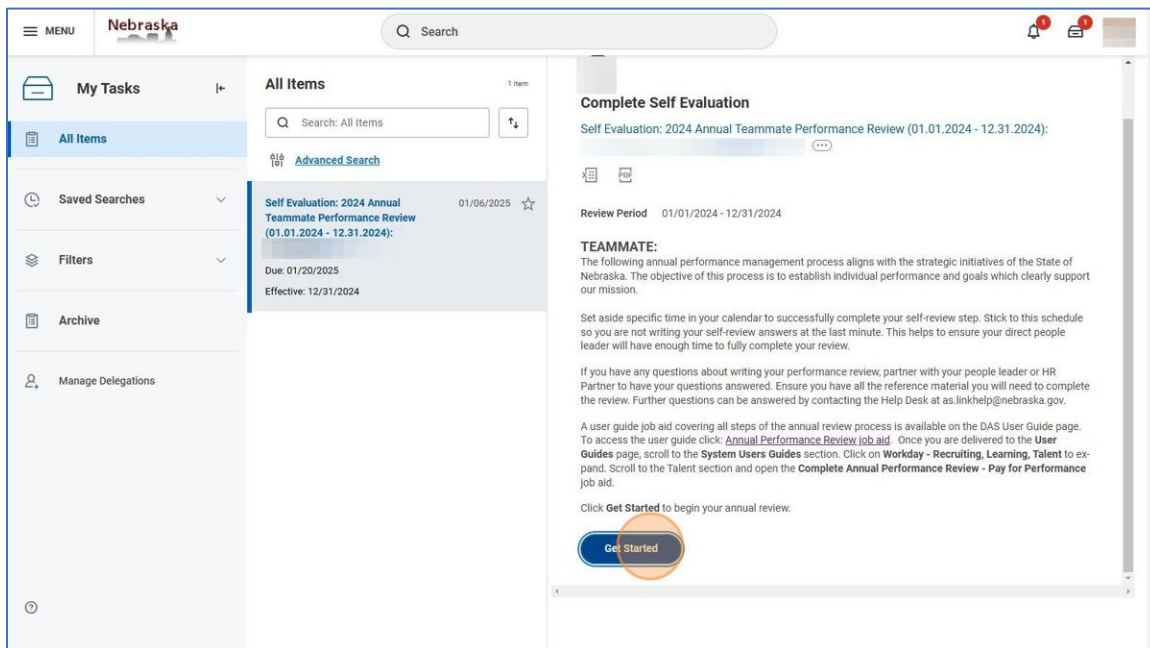
You also view your goals by selecting your picture in the top right corner of the page → **View Profile** → **Performance** → **Individual Goals**.

Self-Evaluations

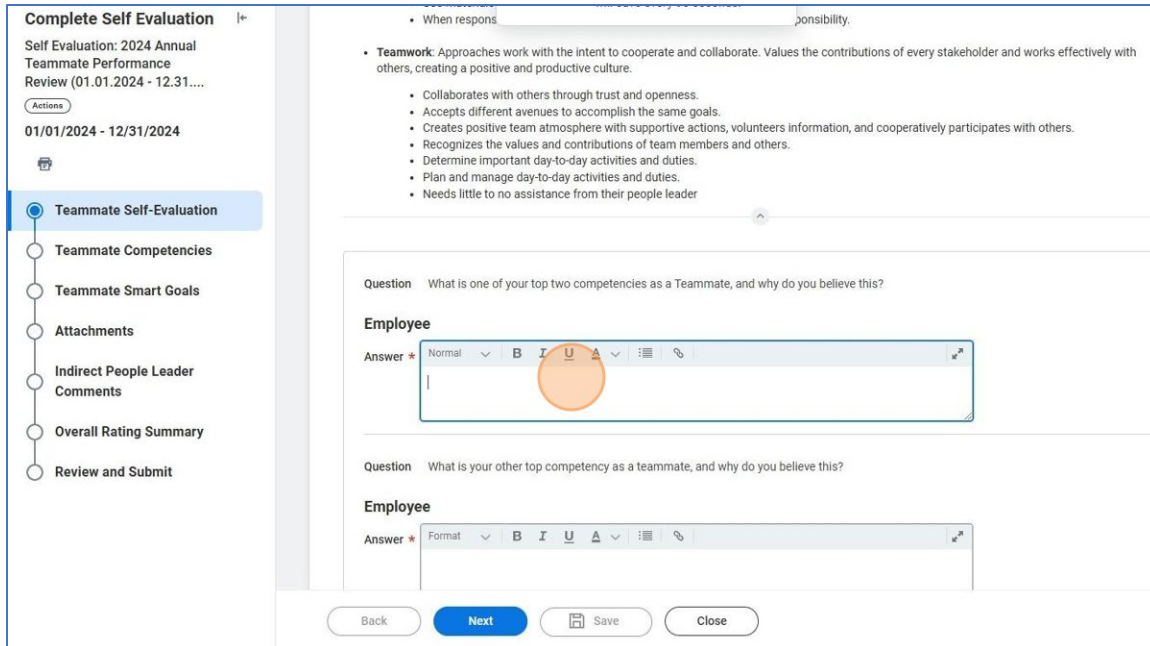
1. On your Workday homepage, click the **Self Evaluation** task in the **Awaiting Your Action** inbox.



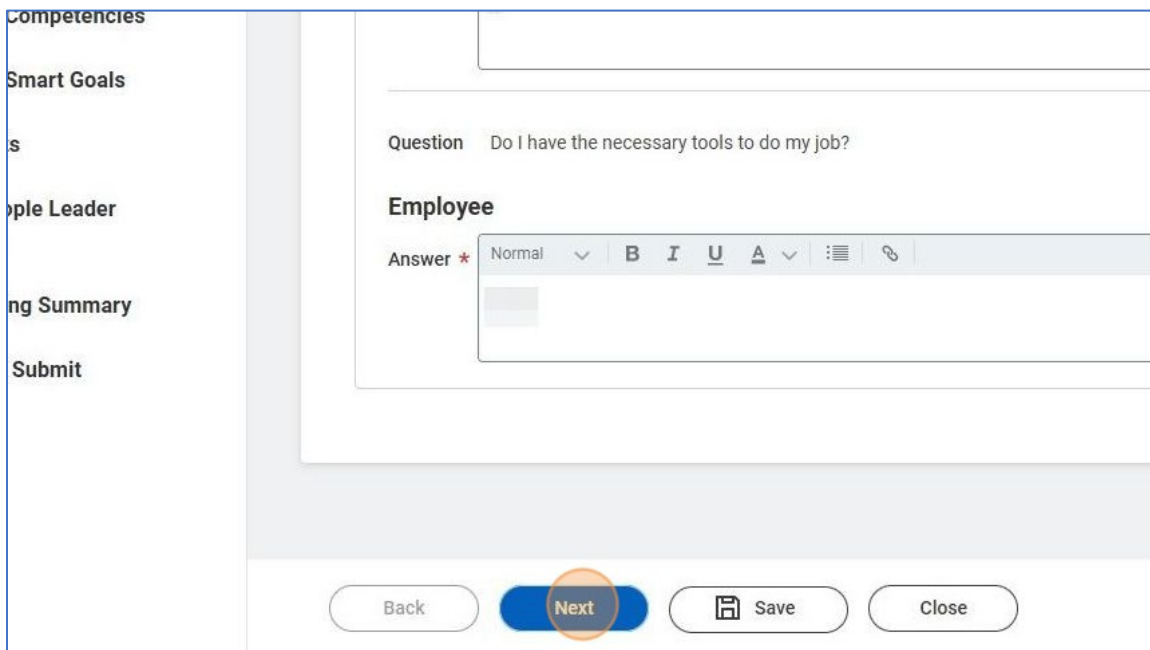
2. Click **Get Started**



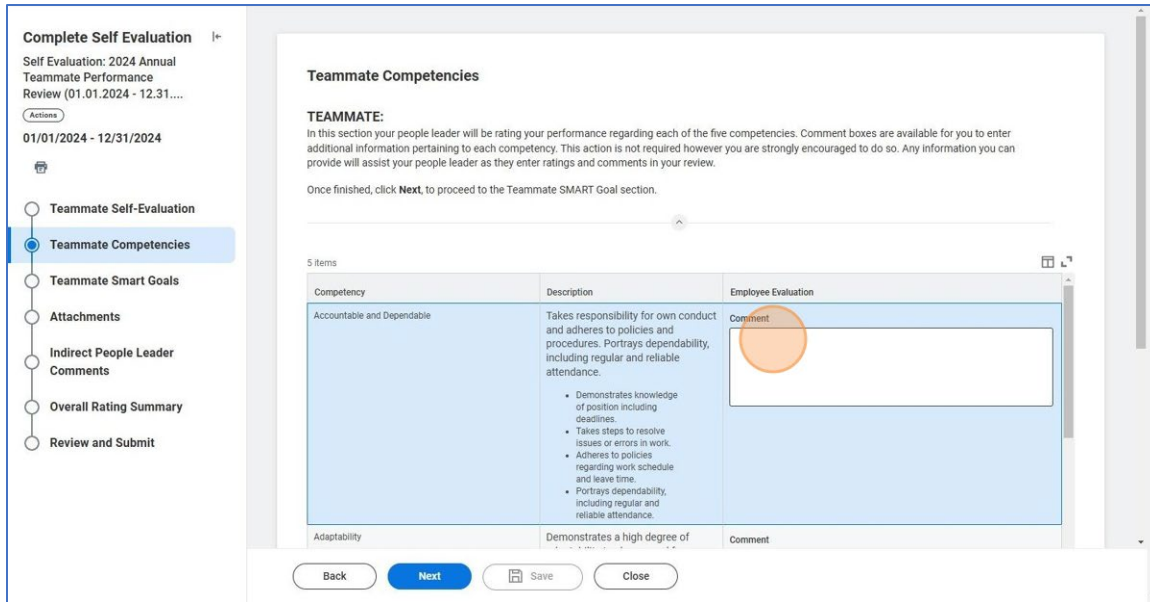
3. On the **Teammate Self-Evaluation** page, enter your answers for the Competency questions.



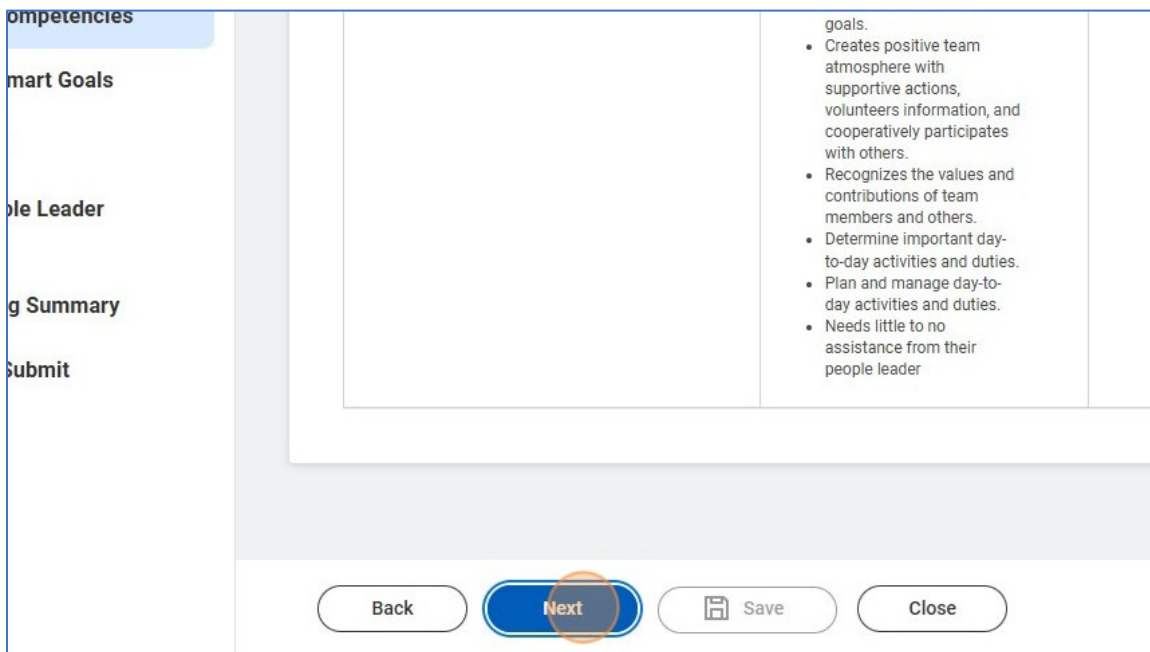
4. When you have entered all your answers, click **Next**



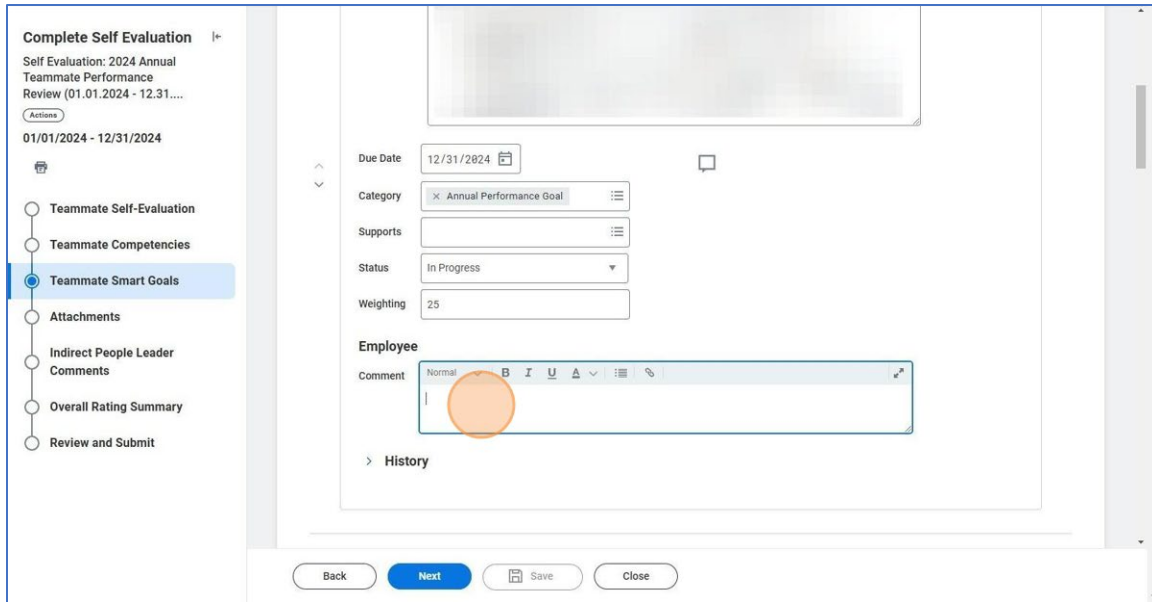
5. On the **Teammate Competencies** page, enter your responses for each Competency.



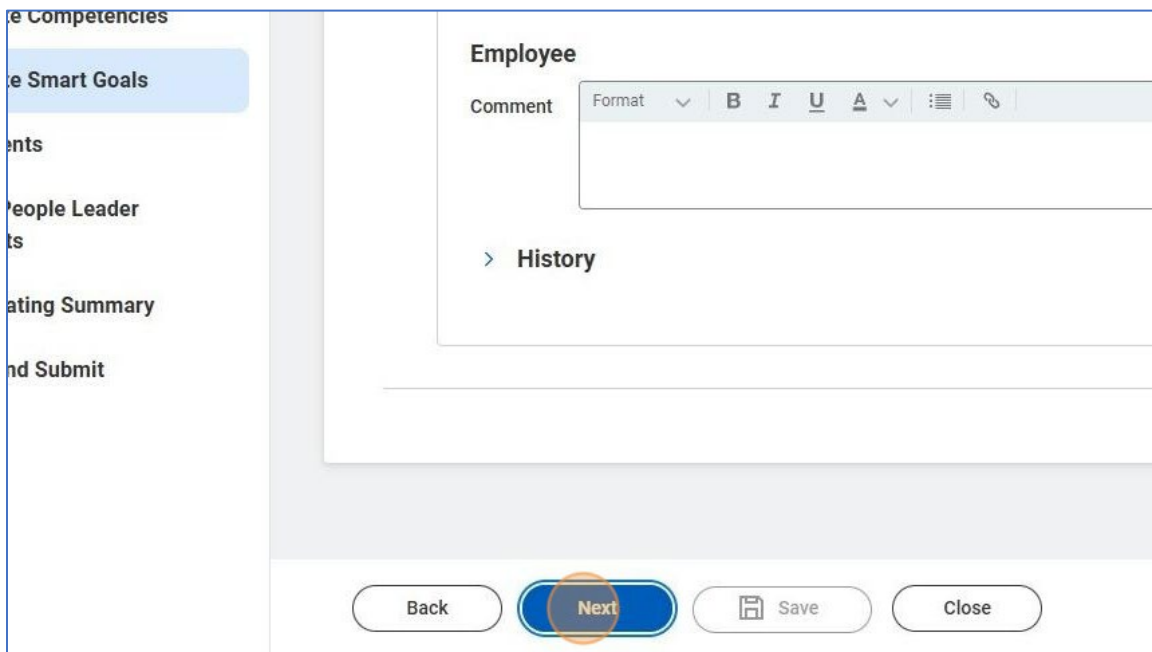
6. Once you have entered all your responses, click **Next**



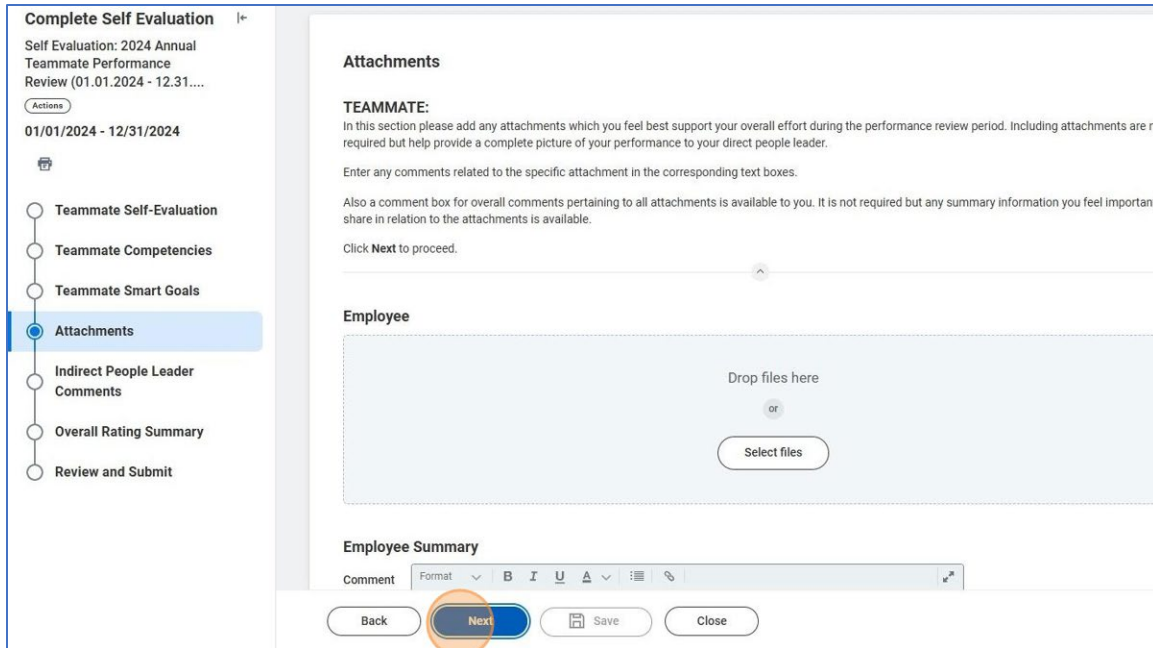
7. On the **Teammate Smart Goals** page, confirm that all your SMART goals for the year are present and the weights add up to 100. Then enter your comments following each goal.



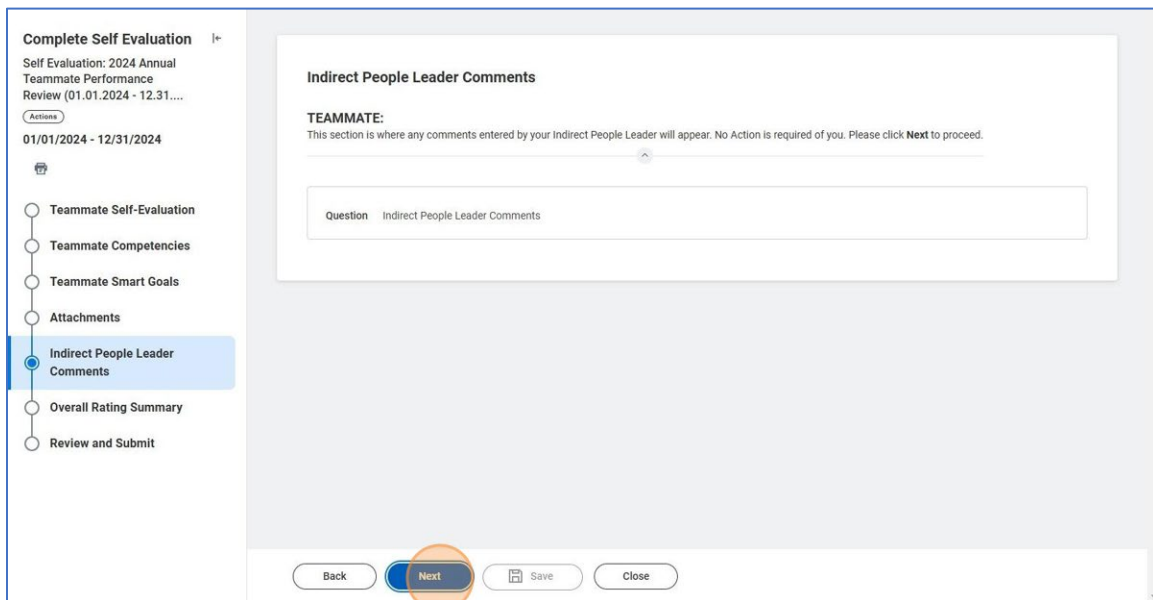
8. When you have entered all your comments, click **Next**



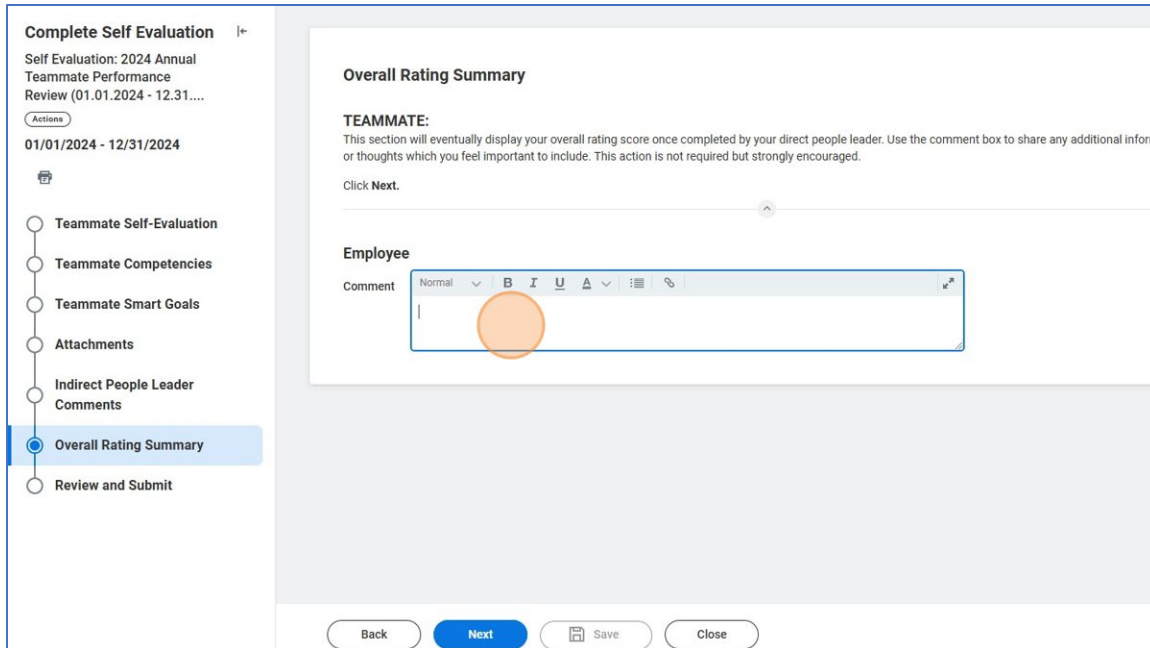
9. On the **Attachments** page, you may upload any supporting documentation regarding your performance throughout the year. Once you have uploaded your attachments, or if you do not wish to upload any attachments, click **Next**



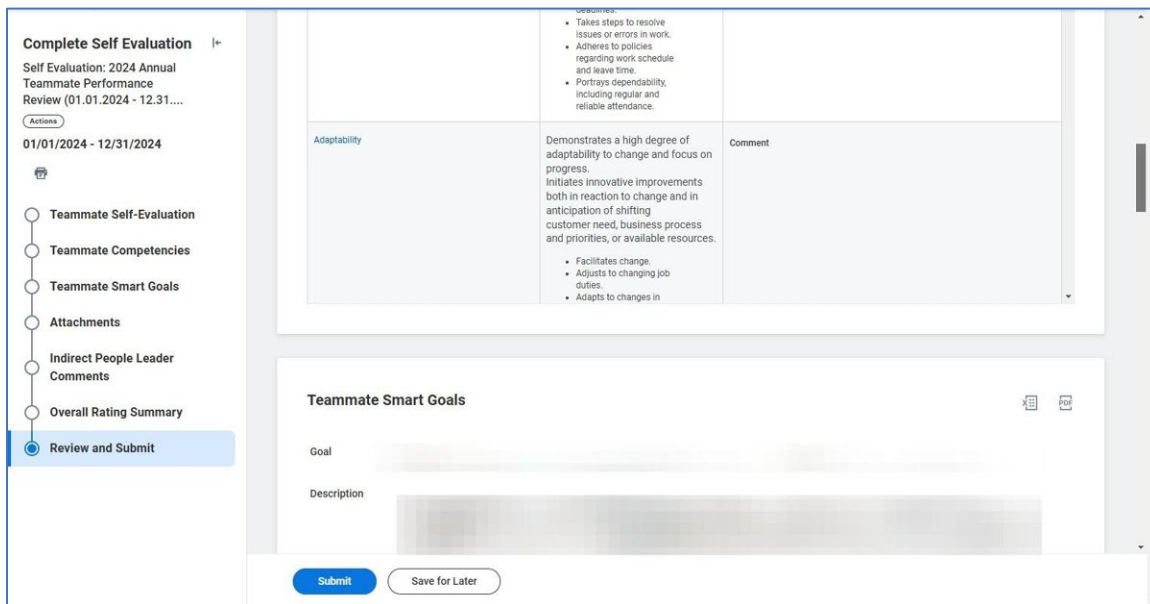
10. There is nothing you need to do on the **Indirect People Leader Comments** page. Click **Next**



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

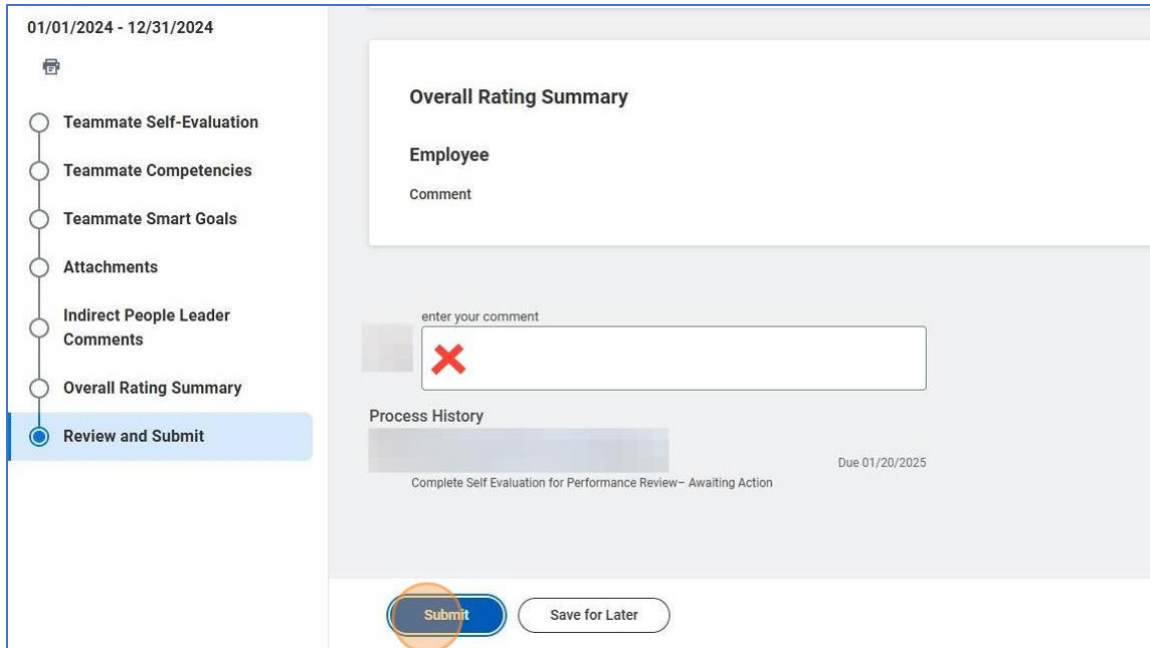


12. On the **Review and Submit** page, review all your comments and confirm it all looks correct.



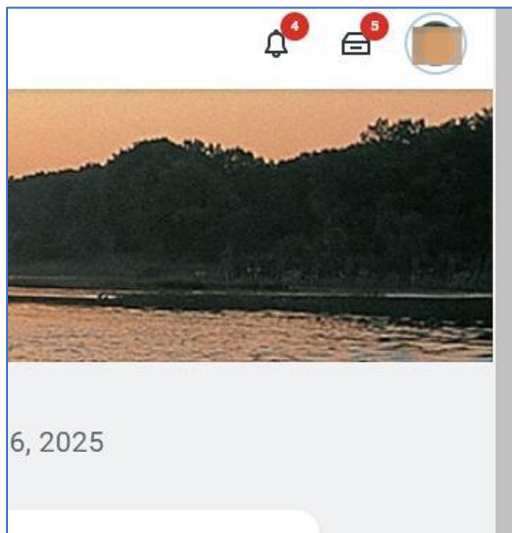
13. Click **Submit** to send your evaluation to the next step. You may save for later if you need to pause and return to the evaluation at a later time.

*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.

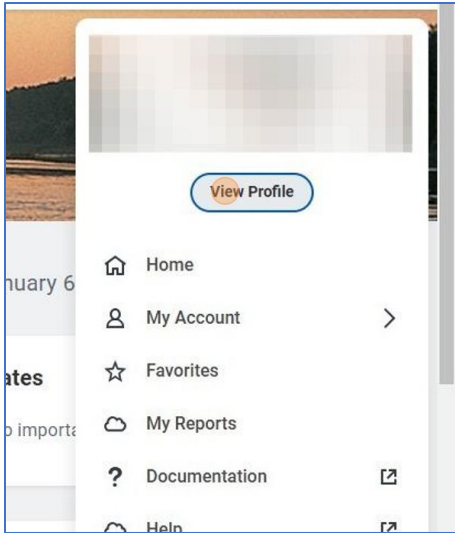


Archiving Old Goals

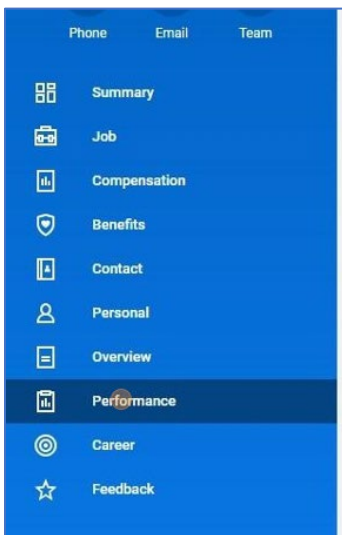
1. Go to your **Workday homepage**
2. Click on your picture in the top right corner of the screen



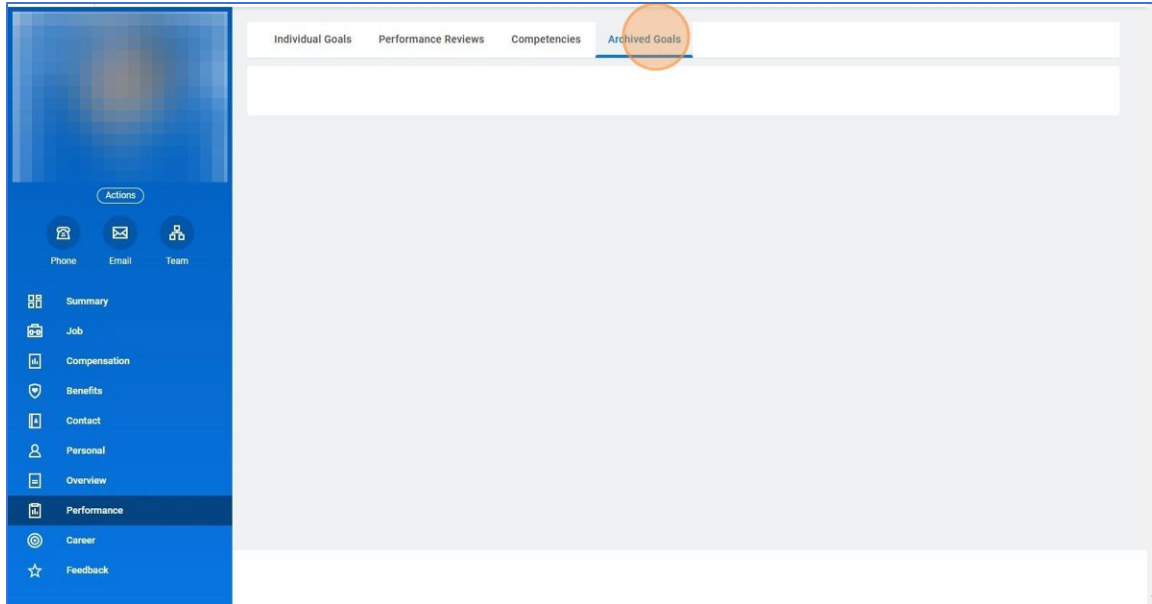
3. Click **View Profile**



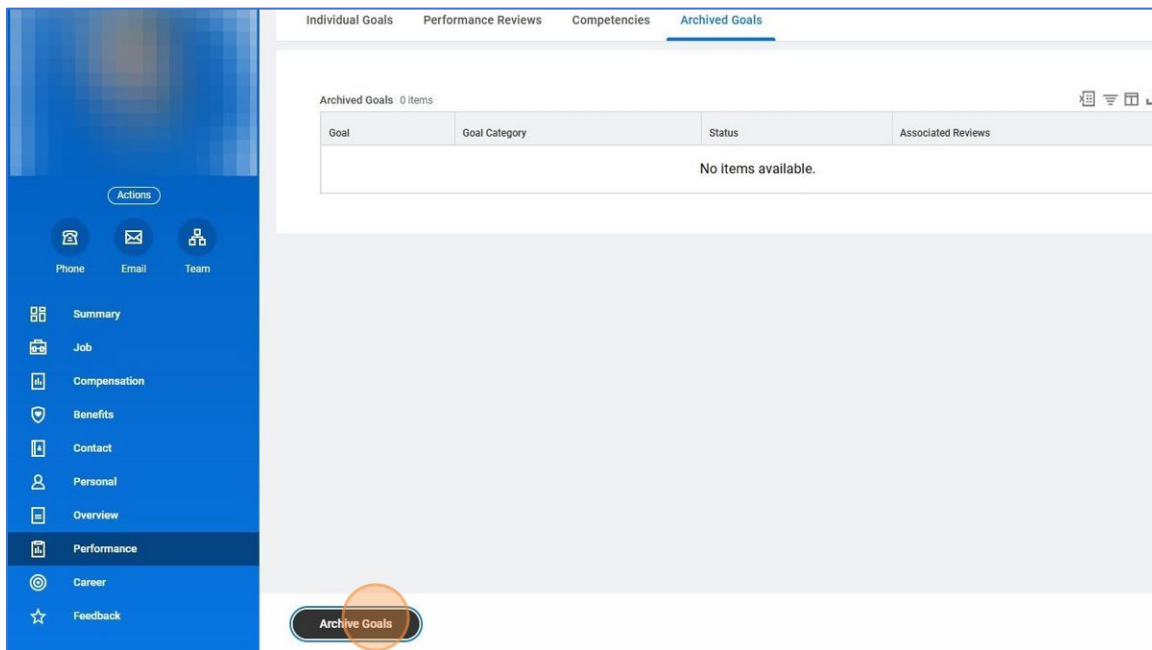
4. Click **Performance**



5. Click **Archived Goals**

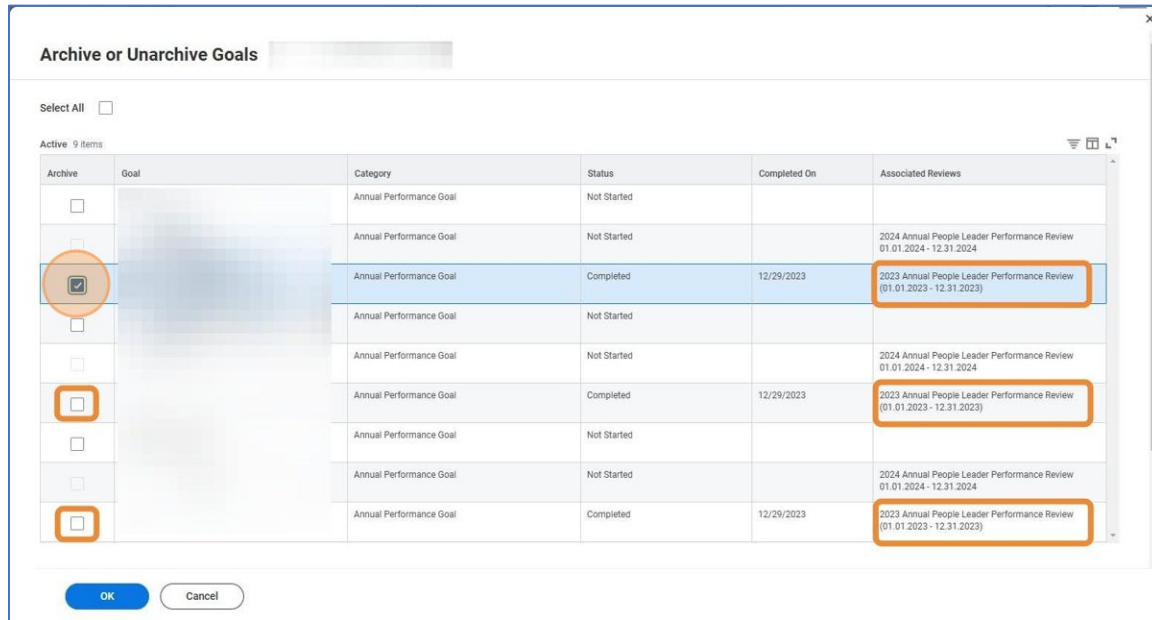


6. Click **Archive Goals**

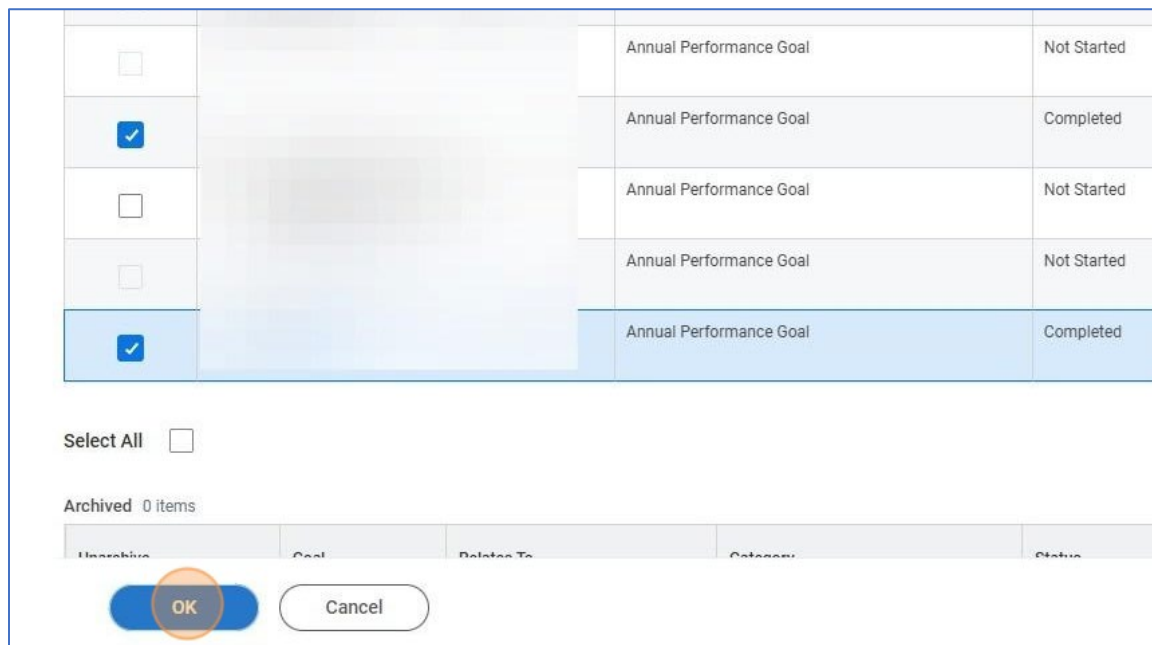


7. Select the goals you'd like to archive. **Ensure they are old goals that have appeared on a previous performance evaluation. You cannot archive goals that are part of an in-process performance evaluation. You should not archive goals that you are currently being evaluated on or will soon be evaluated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

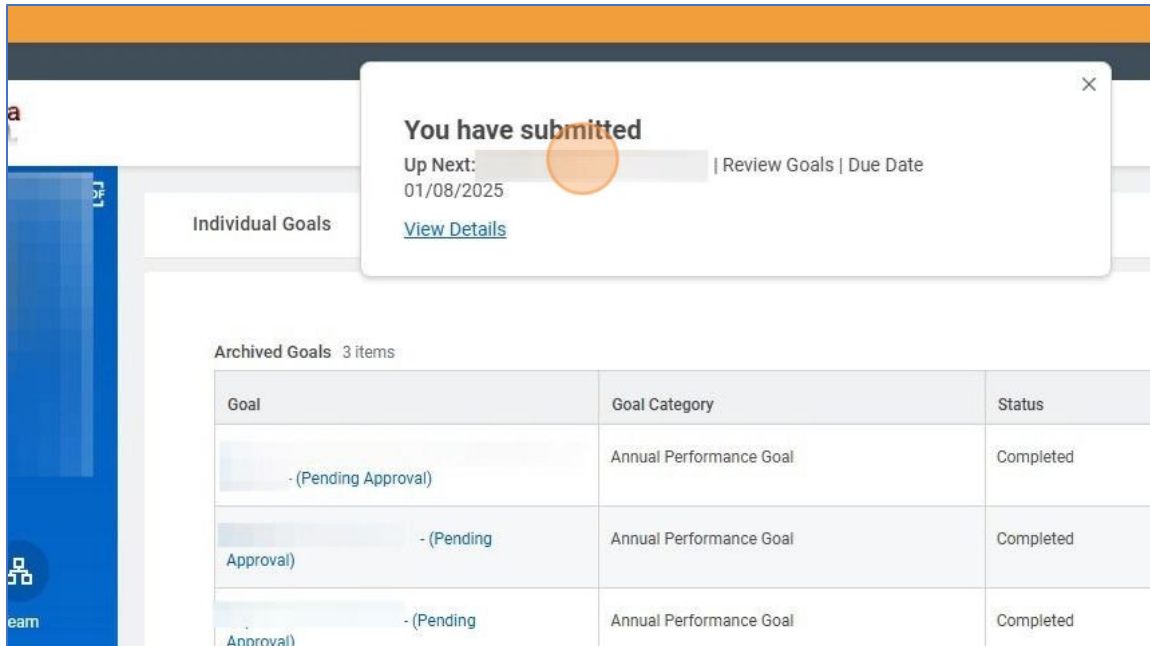
2025. Wait until after your 2025 performance evaluation has been completed or your evaluation will not have your SMART goals on it).



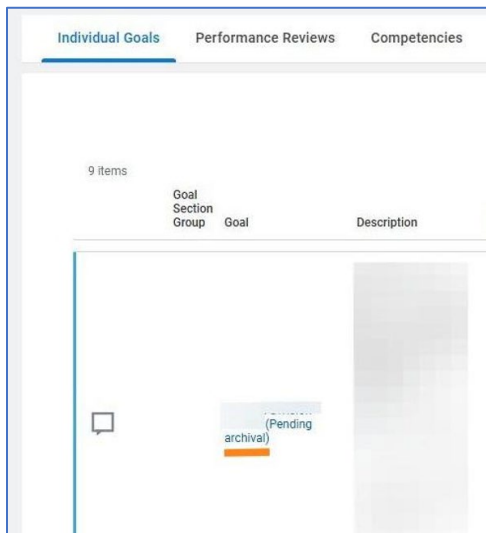
8. Click "OK"



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



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

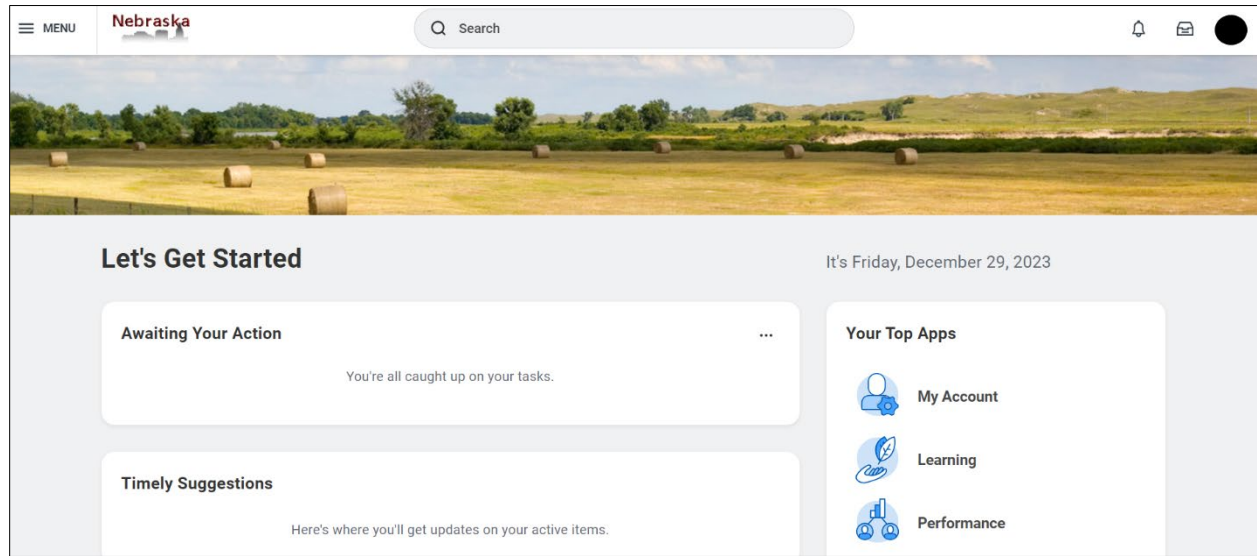


You can unarchive goals by following the same process. You won't be able to unarchive goals until the initial archival request is approved or denied by your supervisor.

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



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
 - Individual Goals
 - Performance Reviews
 - Competencies
 - Archived Goals
- Career
 - Certifications
 - Learning
 - 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.

1. In the **Workday Learning app**, select **My Learning**.
2. Scroll down and click **Drop Enrollment**.
3. Enter and select the course to drop.
4. Select the **Drop Reason**.
5. Click **OK**, then **Done**.

