



Workday Performance Management: Goal Setting

This job aid includes steps for the following:

1. [Goal Setting](#)
2. [Edit Goals](#)
3. [Add Additional Goals](#)

Please refer to the **SMART Goals Worksheet** on the [HR Performance Management site](#) to help create objective goals for every team member. *Keep in mind that goals can and should be revisited throughout the performance management cycle.*

Goal Setting

The goal setting process starts with a manager task.

Manager Steps

1. Log into Workday and click on the **Meet with Employee for Goal Setting** task.
2. Read through the instructions to understand the process. Schedule a meeting to discuss goals with each of your employees.

Complete To Do [Meet with Employee for Goal Setting](#)

For [REDACTED]

Overall Process [Goal Setting 07/2024- 06/2025](#): [REDACTED]

Overall Status In Progress

Instructions **[Time to meet and discuss goals for the current academic year!](#)**

Please meet with your employee to discuss goals in detail. To complete this step, you do not need the Workday system.

After meeting with your employee, re-open this task and click **Submit**. The employee will receive a task to enter/update their goals.

Once the employee inputs and submits their goals, you will get a task to approve/update the employee's goals.

After you review and approve the goals, the employee will get a task to acknowledge the goals.

Employees can track goal progress and make notes in Workday throughout the year.

3. Once you have met and discussed goals in detail with your employee, return to the task in Workday and click **Submit**.
4. The employee will have a task in Workday to enter their goals.

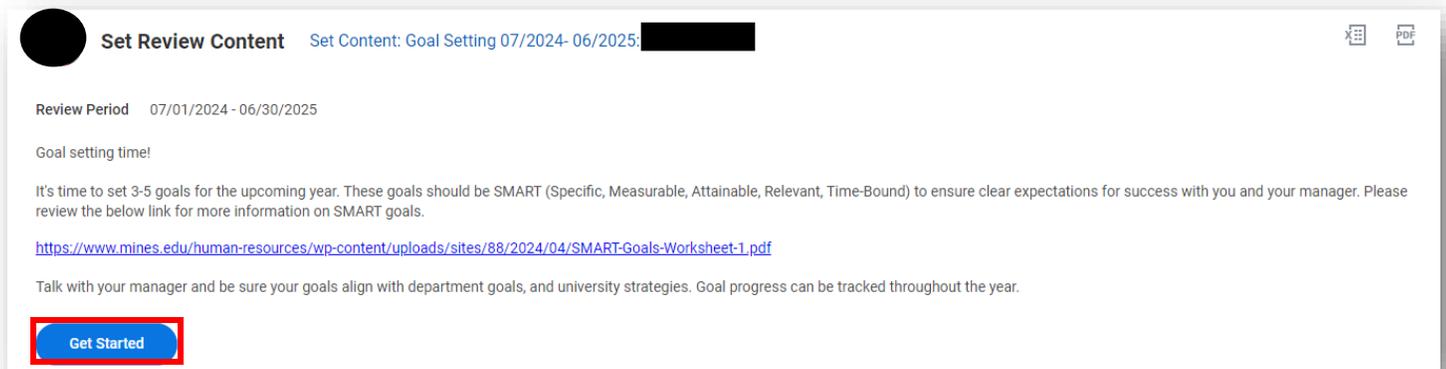
Submit

Save for Later

Close

Employee Steps

1. Click on the **Set Goals for Current Academic Year** task.
2. Read the help text then click on **Get Started**.



Set Review Content Set Content: Goal Setting 07/2024- 06/2025

Review Period 07/01/2024 - 06/30/2025

Goal setting time!

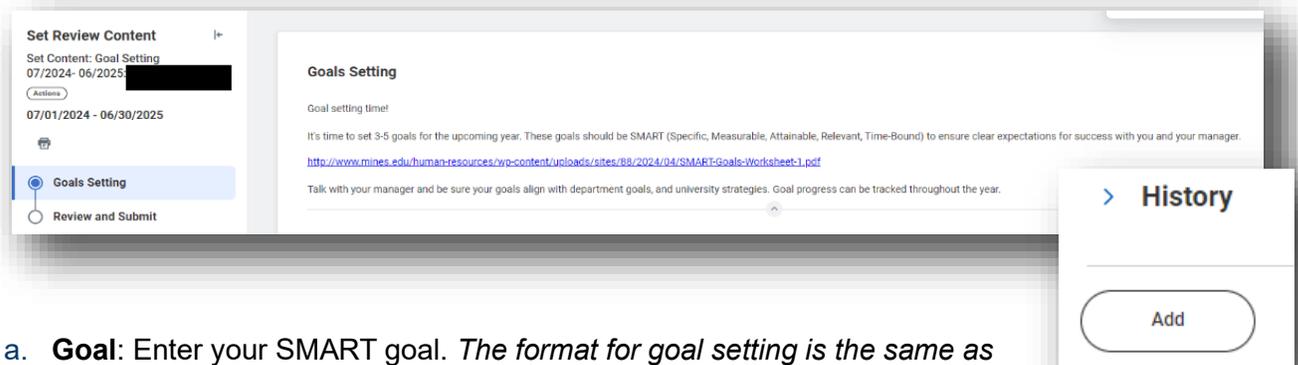
It's time to set 3-5 goals for the upcoming year. These goals should be SMART (Specific, Measurable, Attainable, Relevant, Time-Bound) to ensure clear expectations for success with you and your manager. Please review the below link for more information on SMART goals.

<https://www.mines.edu/human-resources/wp-content/uploads/sites/88/2024/04/SMART-Goals-Worksheet-1.pdf>

Talk with your manager and be sure your goals align with department goals, and university strategies. Goal progress can be tracked throughout the year.

Get Started

3. Scroll down and click **Add** to enter new goals. Note: Previous goals may be listed here. Review these and update the **Status** appropriately.



Set Review Content Set Content: Goal Setting 07/2024- 06/2025

07/01/2024 - 06/30/2025

Goals Setting

Goal setting time!

It's time to set 3-5 goals for the upcoming year. These goals should be SMART (Specific, Measurable, Attainable, Relevant, Time-Bound) to ensure clear expectations for success with you and your manager.

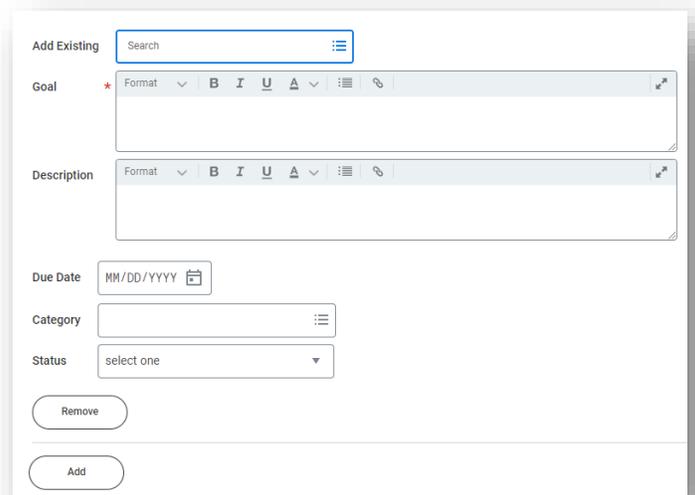
<http://www.mines.edu/human-resources/wp-content/uploads/sites/88/2024/04/SMART-Goals-Worksheet-1.pdf>

Talk with your manager and be sure your goals align with department goals, and university strategies. Goal progress can be tracked throughout the year.

History

Add

- a. **Goal:** Enter your SMART goal. *The format for goal setting is the same as the format completed for performance reviews.*
- b. **Description:** Enter any notes about progress or changes that happen throughout the year.
- c. **Category:** Click to select **Performance Objective**. Note: This makes the performance objective available under **Add Existing** in the future.
- d. **Status:** Select the appropriate status for your goal. *For most goals you will select **On Track**.*
- e. **Due Date:** Select date.
- f. Click **Add** to enter additional goals.
- g. Click **Next**.



Add Existing Search

Goal * Format B I U A v : |

Description Format B I U A v : |

Due Date MM/DD/YYYY

Category

Status select one

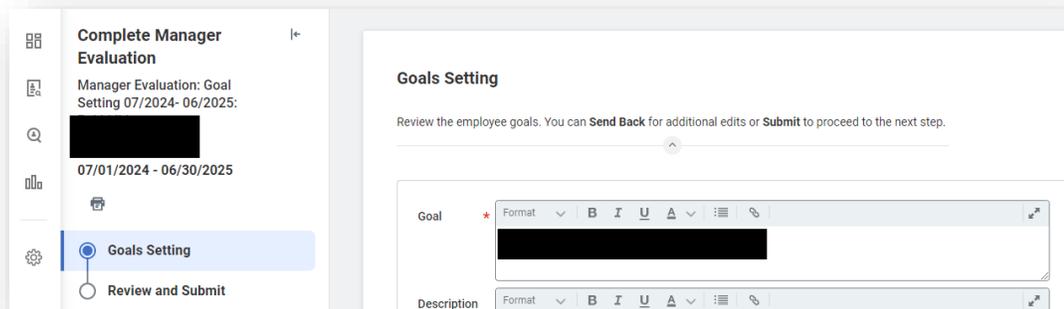
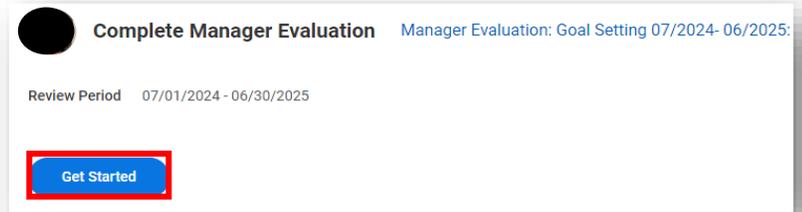
Remove

Add

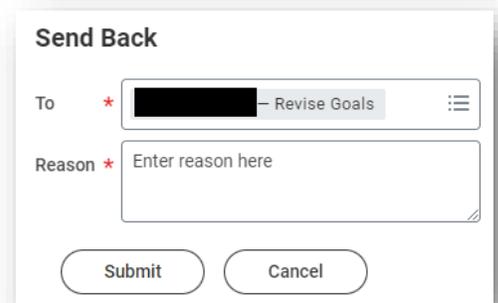
4. On the **Review and Submit** page, review the goals. Once you have entered all the goals, click on **Submit** to send the goals to your manager to review and approve.

Manager Steps

1. Click on the **Manager Evaluation: Goal Setting** task.
2. Click on **Get Started** to review the goals the employee entered.
3. Scroll down to review the goals and ensure they reflect what you discussed and that they are SMART. Click **Next**.

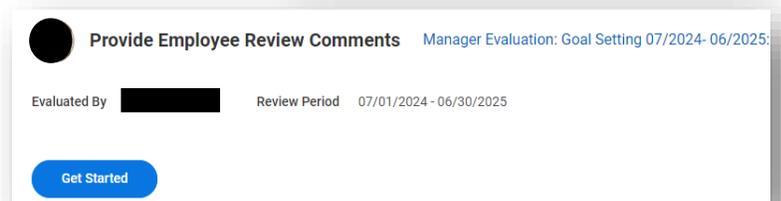


4. On the **Review and Submit** page, do one of the following:
 - a. Click **Submit** to approve the goals entered.
 - b. Click **Send Back** to have the employee make edits.

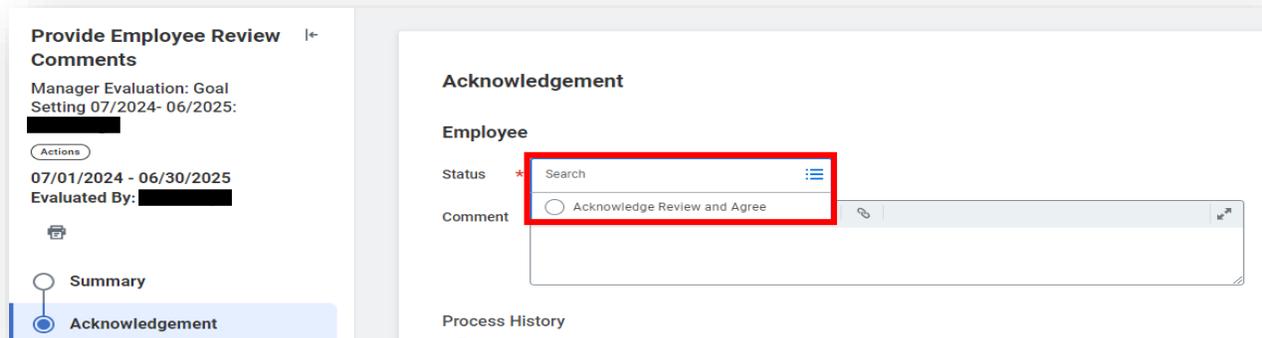


Employee Steps

1. Once the manager approves the goals, the employee will receive a task. Click on **Get Started**.
2. Click **Next**.



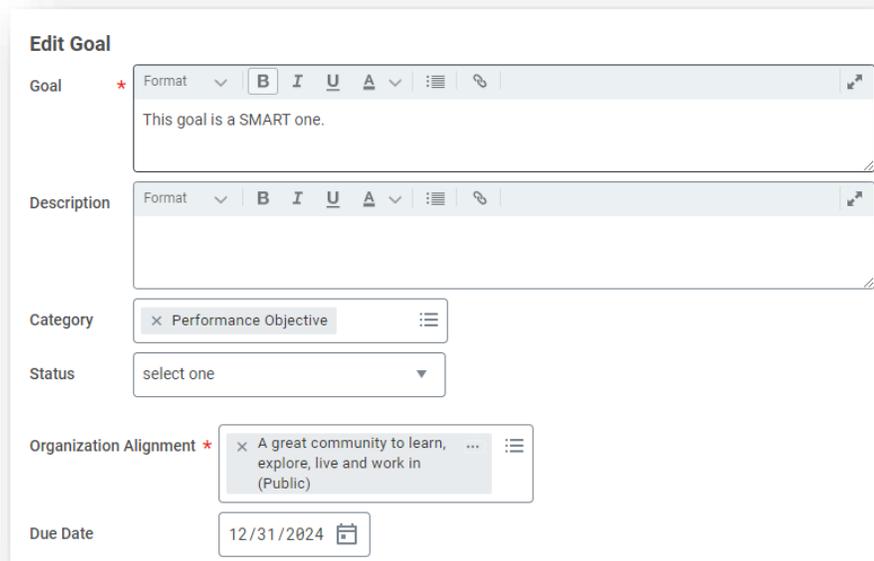
3. Click the **Status** drop down and select **Acknowledge Review and Agree**. Add notes in the **Comment** field, if applicable.



4. Click **Submit**. You have successfully completed the goal setting process!

Edit Goals

1. Click on your profile on the top right of your Workday screen and click **View Profile**.
2. In the left menu, click on **Performance**.
 - a. On the right, under **Individual Goals**, select the goal and click **Edit**.
 - b. Click **Edit**.
3. Select the goal you want to update.



Add Additional Goals

All employees can add additional goals in Workday throughout the year. Follow the steps below:

1. Click on your profile on the top right of your Workday screen and click **View Profile**.

2. In the left menu, click on

Performance.

a. On the right, under **Individual Goals**

b. Scroll down to click **Edit**

c. Click **Add**.

3. Enter the details of the goal in the **Create Goal** section.

a. **Goal:** Enter your SMART goal.

b. **Description:** Enter any notes about progress or changes that happen throughout the year.

c. **Category:** Click to select **Performance Objective**.
Note: This makes the performance objective available under **Add Existing** in the future.

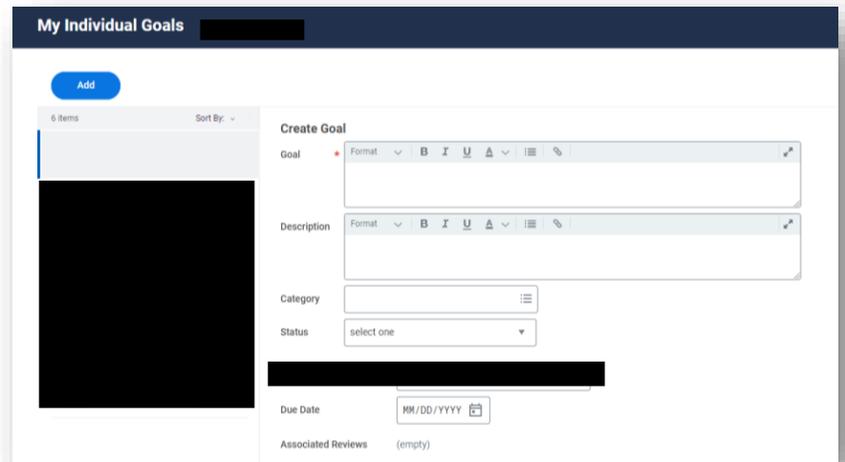
d. **Status:** Select the appropriate status for your goal.

e. **Due Date:** Select date.

f. Click **Add** to enter additional goals.

g. Click **Submit**.

h. The goal is sent to your manager for approval.



4. The Manager will receive a notification and task to review the newly added goal.

a. Review the goal. Take one of the actions below:

b. Click **Send Back** to have the employee make edits. This will create a task for the employee to review and update the goal before submitting it again.

c. Click **Approve** if the goal is accurate.

