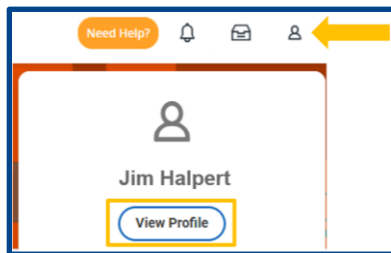


Performance: Add or Edit Individual Goals

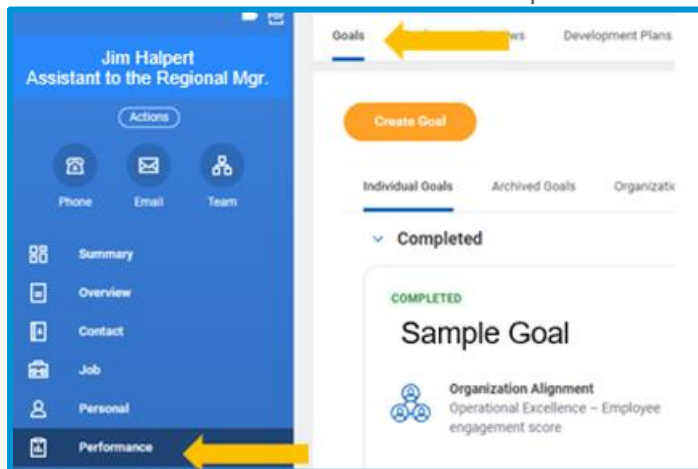
Each goal requires a **Strategic Priority** and **Key Result**. If you are unsure of this information, connect with your direct supervisor to make sure your goals are aligned with your department/team goals and your areas of responsibility. Refer to [2024 Strategic Plan Employee Worksheet](#) for assistance.

- Goals are set **annually**.
- You are required to have **at least 2 goals**.

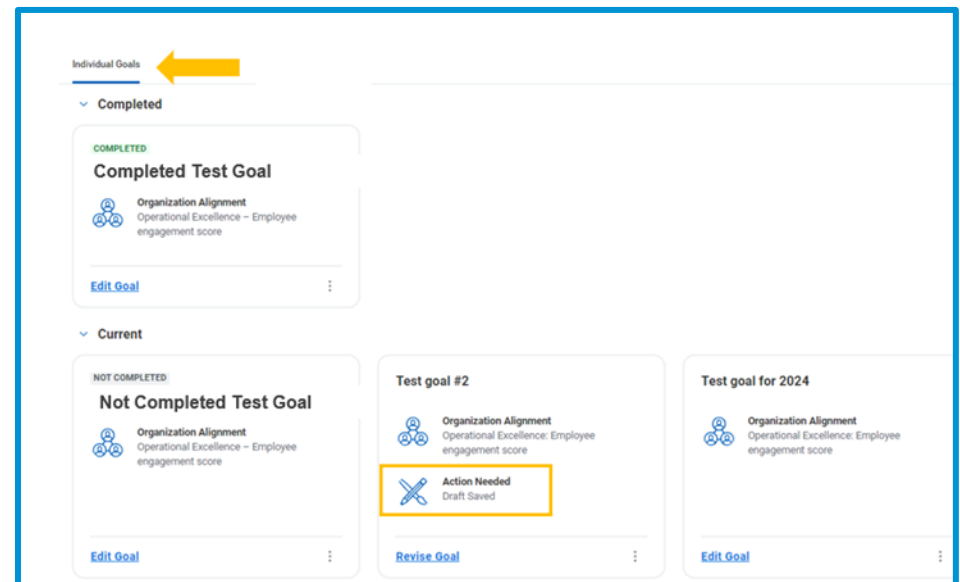
1. Select the **Profile** icon on the top right of your screen.
2. Select **View Profile**



3. Select **Performance** from the blue menu on the left
4. Select **Goals** from the tab at the top.




5. Select the **Individual Goals** tab. This will display any previously created goals as tiles and categorized into two sections:
 - a. **Completed** – goals with a **Status of Completed** and a corresponding **Completed On** date.
 - b. **Current** – goals with a **Not Completed Status** and includes:
 - i. **Draft goals** that have **not been submitted** and require revision
 - ii. **Goals that without a Status**.

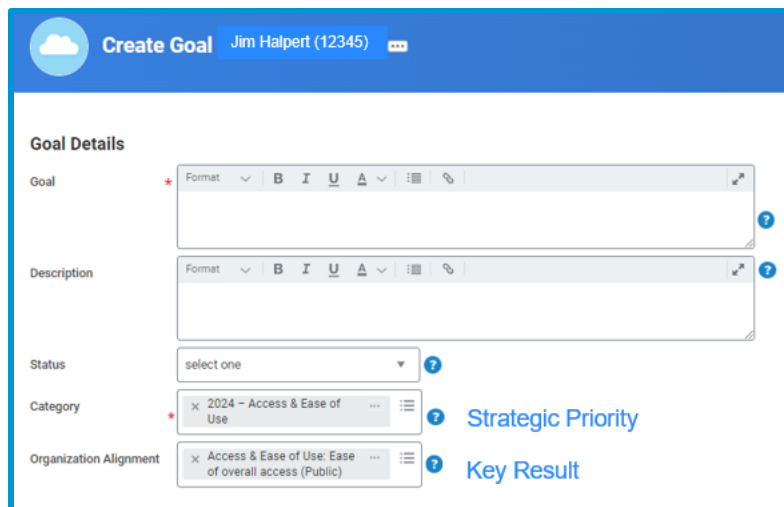


Note: Draft goals will **not be visible** to your leader until the goal is revised and **submitted**.

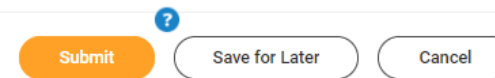
Performance: Add or Edit Individual Goals

ADD GOALS

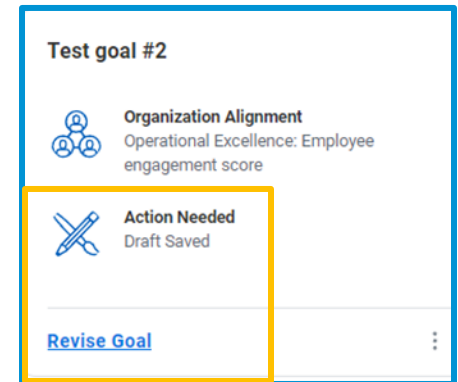
1. To add a new goal, select the **Create Goal** button
2. Enter the required information in the goal template. To assist you with the process, refer to the Smart Tips 
 - a. Goal (title)
 - b. Description
 - c. Status: you can leave this blank or select Not Completed or Completed
 - i. If you select Completed, you will be required to add a date of when the goal was completed.
 - d. **Category:** refers to **one of Geisinger's Strategic Priorities** (Access & Ease of Use, Managing Total Health or Operational Excellence) and is aligned with the **current** calendar year.
 - e. **Organization Alignment:** refers to one of Geisinger's **Strategic Plan – Key Results** such as Employee engagement score, GHP Gold membership, ease of overall access, etc.



3. Once you have entered the required information, you can:



- a. Select **Save for Later** to save your information if it requires additional **edits or a discussion with your leader** before it is finalized. The goal will appear as a task in your Workday inbox and display as **“Draft Saved”** on the Individual Goals tab. Refer to the [Revise Goal](#) section for additional instructions.
- b. Select **Submit** for **finalized** goals to become **active and visible to your leader**.
- c. Select **Cancel** if you want to **discard** the information you entered. The goal will **not be saved**.



EDIT GOALS

1. If you want to edit a previously added goal, click on the **Edit Goal** button for the respective goal.
2. From the Goal Details page, make any changes to the Goal, Description, Status, Completed On (if the Status is Completed), Category (Strategic Priority) and Organizational Alignment (Key Results) fields.
3. Once your changes are completed:
 - a. Select **Submit** for your **changes to be saved and become**

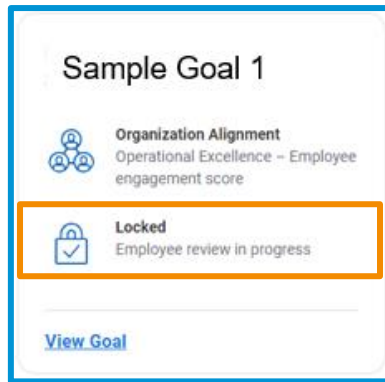
Performance: Add or Edit Individual Goals

active. When changes become active, your leader can also view those changes.

- b. Select **Save for Later** for your **changes to be saved** but not visible to your leader. The goal will display as **“Action Needed Draft Saved”** and you will eventually need to use the [Revise Goal](#) option and select **Submit** for your edits to become **active and visible** to your leader.

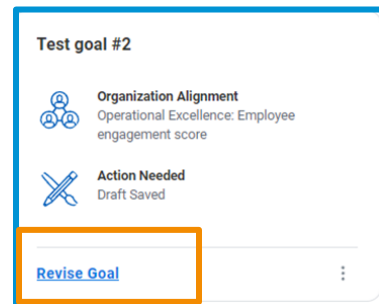


Note: Once a goal is **associated with a performance review**, the goal is **Locked** (Employee review in progress) and **can no longer be edited** from the **Goals** page. Any changes to the goal will need to be made on the current performance review.




REVISE GOAL

1. If you want to **revise and submit** a goal that was previously **“Saved for Later,”** click on the **Revise Goal** option for the respective goal.



2. From the **Goal Details** page, make any changes to the Goal, Description, Status, Completed On (if the Status is Completed), Category (Strategic Priority) and Organizational Alignment (Key Results fields).
3. Once your changes are finalized:
 - a. Select **Submit** for your goal to become **active and visible to your leader**.

ADDITIONAL FUNCTIONALITY

1. Additional functionality is available for any goals **not associated with an active performance review** by selecting the  (three dots) at the bottom of the goal. Depending on the status of the goal, that functionality could include:
 - a. **Delete goal** – this will permanently remove the goal from Workday and the goal cannot be restored.
 - b. **Archive goal** – this allows you to **remove goals** from your Individual Goals tab that are no longer relevant to your current role (associated with a previous job) or from a previous year. This option allows you **retain your goals** in the **Archived Goals** tab.
 - c. **View goal** – allows you to view the content of the goal without making any edits or updates to the content of the goal.

