# Performance: Viewing or Editing Your Employee's Goals

REMINDERS

- Goals are set **annually,** and each employee is required to have at least **2 goals**.

- Goals must be **aligned with Geisinger's Strategic Plan** and linked to a **Strategic Priority** (Category).

- Goals entered in Workday **do not require leader approval.** Leaders are required to make sure your **employee's goals are aligned with your team/department goals** and the employee's **areas of responsibility.**

- An employee can enter their own or a manager can enter goals on the employee's behalf, either by individual employee or the entire team.

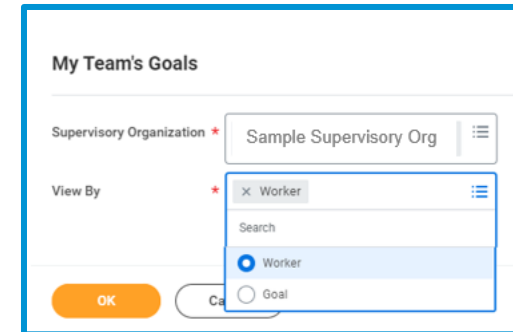## REVIEWING GOALS FOR ALL EMPLOYEES
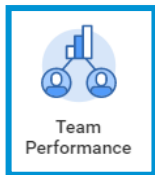
1. Select the **Team Performance** app.

2. From the **Team Performance** section on the page (you may need to scroll), select **View More**.
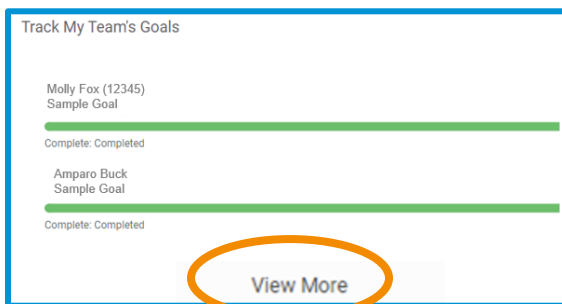
3. For this step,

- Select your **Supervisory Organization(s) and**

- **View By:** allows you to view the information by **Employees** (worker) or by **Goal**.

- Click **OK**

4. The next screen will display a chart organized by **Employee** or **Goal,** depending on what was chosen from the View By option. The chart also includes:

- Goal Section (Current or Completed)

- Goal (title of the goal)

- Description

- Category (Strategic Priority)

- Status (Blank, Completed, Not Completed),

- Completed On (if "Completed" is selected in the Status, a completed date is required in this field)

- Associated Reviews*

*Note: Goals linked to a performance review will have the performance review identified in the Associated Reviews section of the chart and were transferred to that performance review for evaluation.

5. From this screen, you can:

- Export the chart to Excel by clicking on

- To view goals from the employee's profile (follow the instructions in the next section).

REVIEWING GOALS FROM AN EMPLOYEE'S PROFILE

1. Follow Steps 1 through 3 in the previous section.

2. From the chart in (Step 4), click on the employee's name.

3. Select **Performance** from the menu on the left.

4. Select **Goals** from the tab at the top.
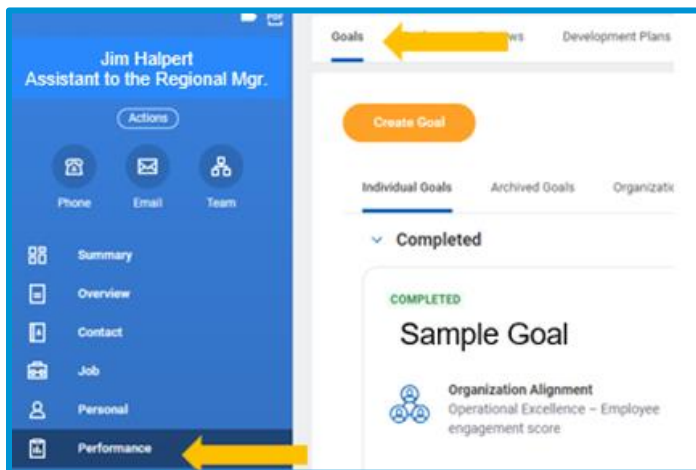
4. Select the **Individual Goals** tab. This will display any previously created goals as tiles and categorized into two sections:

5. From the Individual Goals tab, you will see previously created goals in two different categories:

- **Completed:** goals with a **Status of Completed** and a corresponding **Completed On** date.

- **Current:** includes goals with a **Not Completed Status** or goals with **no Status**.
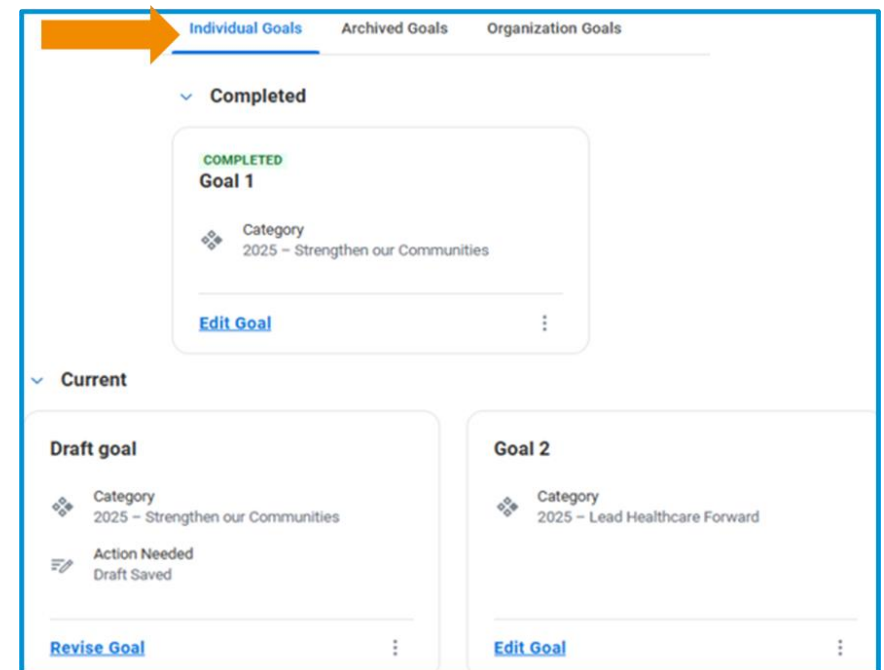
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Note: **Draft goals** will **not be visible to the leader** from the employee's profile. For it to be visible to the leader, the employee needs to **revise and submit** the goal to make it **active.**

EDITING AN EMPLOYEE'S GOAL

1. Follow steps 1-4 from the Reviewing Goals from an Employee's Profile above

2. Select the **Edit Goal** link for the goal you want to edit.
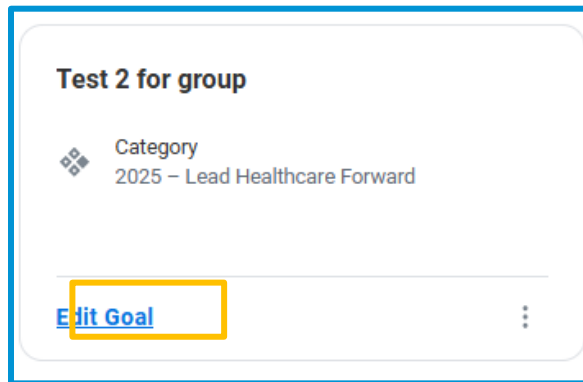
3. From the Goal Details page, make any changes to the Goal, Description, Status, Completed On (if the Status is Completed) and Category (Strategic Priority) fields.

4. Once your changes are completed, select **Submit** for your **changes to be saved and become active**.

Note: Once a goal is **associated with an open performance review**, the goal is **Locked** and **can't**

be edited from the **Goals** page. Any changes to the goal will need to be made in the current performance review.

ADDITIONAL GOAL FUNCTIONALITY

1. Functionality is available for any goals **not associated with an active performance review** by selecting the ⋮ (three dots) at the bottom of the goal. Functionality could include:

- **Delete goal** – use this option to permanently remove the goal from Workday. Once deleted, it cannot be restored.

- **Archive goal** – use this option to remove goals from your Individual Goals tab that are no longer relevant to your current role or from a previous year. Archived goals will be retained in the **Archived Goals** tab

- **View goal** – use this option to view the content of the goal without making any edits or updates to the content of the goal.