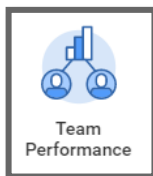


Performance: Viewing or Editing Your Employee's Goals

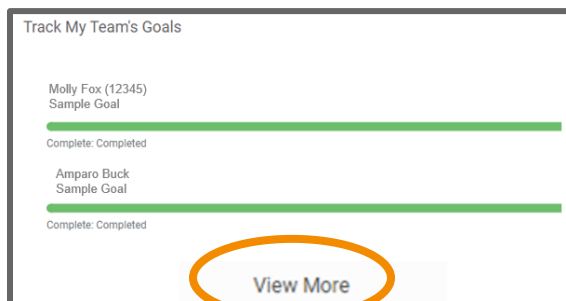
REMINDERS

- 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 must be linked to a **Strategic Priority (Category)** and **Key Result (Organizational Support)**.
- 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.

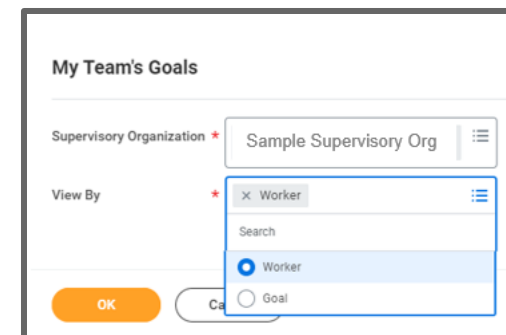
REVIEWING GOALS FOR ALL EMPLOYEES



1. Select the **Team Performance** app.
2. From the **Track My Team's Goals** section, select **View More**.



3. For this step,
 - Select your **Supervisory Organization(s)**.
 - **View By** allows you to view the goal information by **Employees (worker)** or by **Goal**.
 - Click **OK**
4. The next screen will display a chart organized by **Employee (worker)** 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
- Organizational Alignment (Key Result)
- 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 template identified in the Associated Reviews section of the chart and were transferred to that performance review for evaluation.

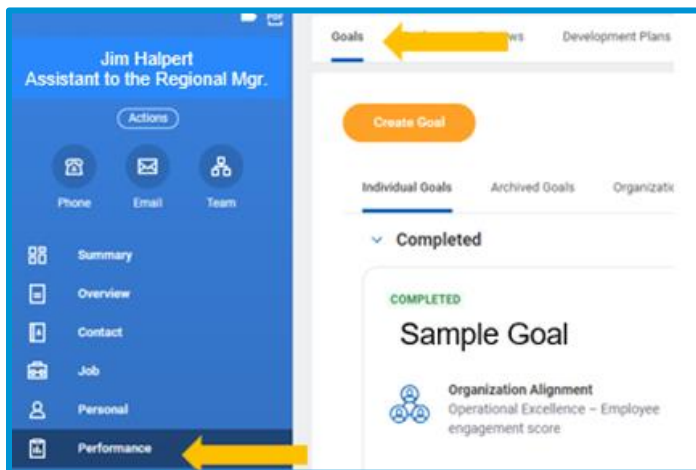
Performance: Viewing or Editing Your Employee's Goals

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).

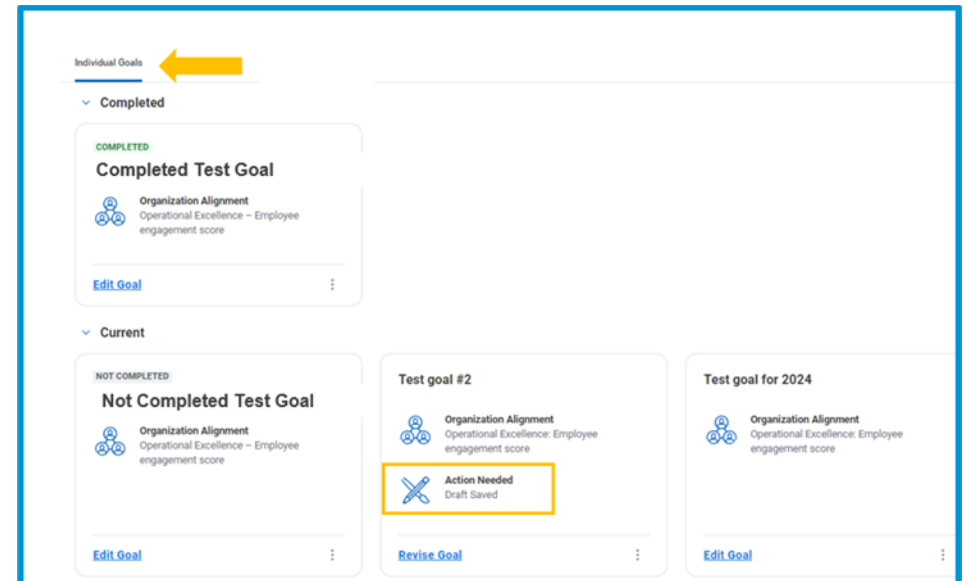
REVIEWING GOALS FROM AN EMPLOYEE'S PROFILE

1. From the chart in the previous section ([Step 4](#)), click on the employee's name or go to the employee's profile
2. Select **Performance** from the blue menu.
3. 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:

- Completed – goals with a Status of Completed and a corresponding Completed On date.
- Current – goals with a **Not Completed** or a **blank** Status.

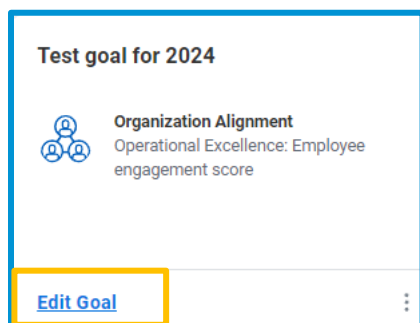


Note: Goals displayed as **Action Needed Draft Saved** on the employee's profile will **not be visible to the leader** when reviewing the employee's goals. For it to be visible to the leader, the employee needs to revise and submit the goal to make it active.

Performance: Viewing or Editing Your Employee's Goals

EDITING AN EMPLOYEE'S GOAL

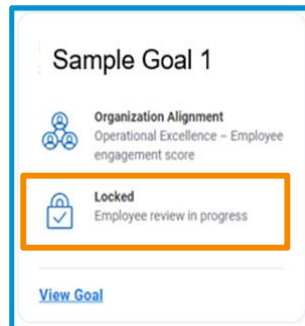
1. Follow steps 1-4 from the [Reviewing Goals from an Employee's Profile](#) above
2. Select the **Edit Goal** link for the goal you want to edit.




3. From the Goal Details page, make any changes to the Goal, Description, Status, Completed On (if the Status is Completed), Category (Strategic Priority) and Organizational Alignment (Key Results) 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 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.



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, the functionality could include:
 - **Delete goal** – this will permanently remove the goal from Workday and the goal cannot be restored.
 - **Archive goal** – this allows you to **remove goals** from your employee's Individual Goals tab that are no longer relevant to their current role (associated with a previous job) or from a previous year. This option allows the employee to **retain the goal** in the **Archived Goals** tab.
 - **View goal** – allows you to view the content of the goal without making any edits or updates to the content of the goal.

