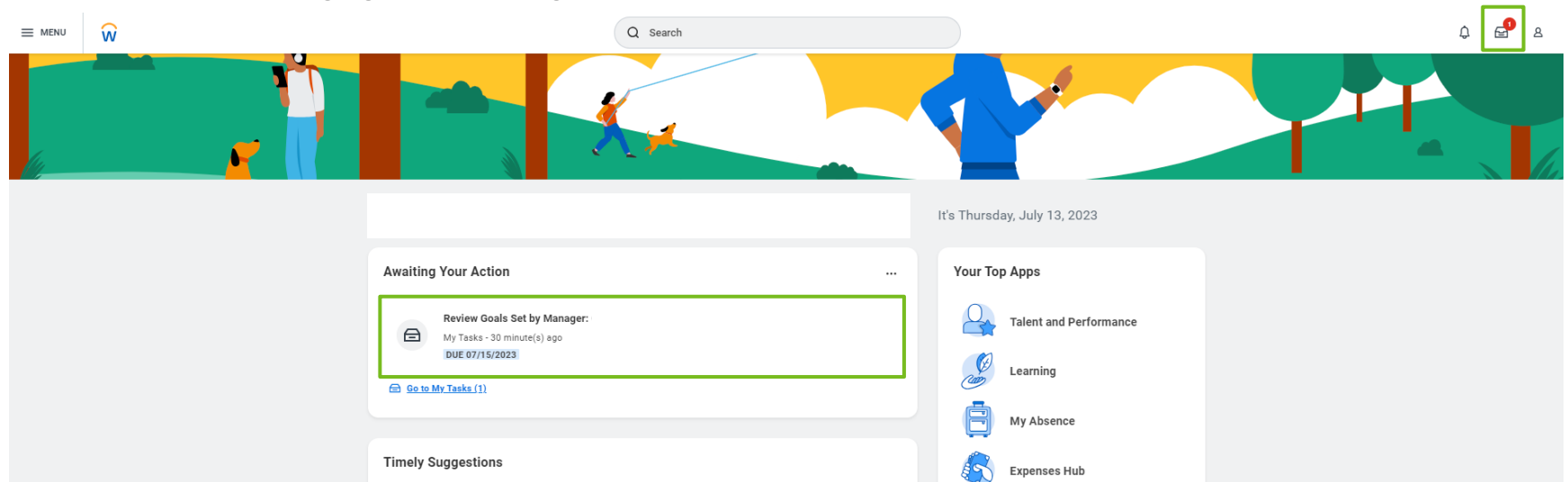


The following job aid details how a manager can set employee goals within Workday. The following information and screenshots are subject to change, and this should just be viewed as a guide.


SET CONTENT

1. From your Workday Homepage: From your Workday home page there are two locations where you can access the “review goals set by manager” task. These locations are highlighted in the image below.



2. By selecting either of the highlighted options above, you will be brought to a screen that looks like the one shown below. Click on the “Get Started” box shown at the bottom in blue.

The screenshot shows the Workday Performance Review Goals Set by Manager interface. On the left is a navigation sidebar with options: My Tasks, All Items, Saved Searches, Filters, Archive, Bulk Approve, and Manage Delegations. The main content area is titled "Review Goals Set by Manager" and includes a search bar, an "Advanced Search" link, and a list of goals. The goals are categorized into: Managers, Employees, Organizational Goals, Better Health, Better Care, Least Waste, and More Joy. Each category includes a goal number, a description, and a list of specific actions. A blue "Get Started" button is highlighted at the bottom of the page.

 **Note:** From the Summary Editor, you can select the Save for Later option at any time if you need to come back to the task at another time.

3. Please review the help text with information regarding the organizational goals and descriptions. Then scroll down to review the goals that your manager has set for you. From this page you can make changes to your goals, *any changes that are made will be sent back to your manager for review and approval.*

The screenshot shows the 'Set Review Content' interface. On the left is a blue sidebar with the title 'Set Review Content' and subtitle 'Set Content: Goal Setting'. Below the title is an 'Actions' button and a date range '07/01/2022 - 06/30/2023'. The sidebar has two main sections: 'Goals' and 'Review and Submit'. The main content area has a '+ Add' button at the top. Below it are two goal cards. The first goal is 'Teamwork and Communication' with a description: 'To make sure you're communicating with your teammates and are helping and encourage them and them you. Working together as a team and communicating as a team.' It has a due date of '06/30/2023', category 'More Joy', relates to 'Teamwork (Competency)', status 'In Progress', and weighting '50'. The second goal is 'Customer Service' with a description: 'To be courtesy to the patients, use language of caring, and use great customer service.' It has a weighting of '50'. To the right of the goal cards are fields for 'Track By' (set to 'Percent'), 'Target Percent' (set to '100'), and 'Actual Percent' (set to '0'). At the bottom of the main content area are four buttons: 'Back', 'Next' (highlighted with a green box), 'Save for Later', and 'Close'.

4. After you have reviewed the goals set, select the "Submit".


This screenshot shows a portion of the 'Set Review Content' interface, focusing on the bottom of a goal card. The goal card shows 'Weighting 50' and '> History'. Below the goal card are two buttons: 'Submit' (highlighted with a green box) and 'Save for Later'. In the top right corner of the main content area, the text 'Actual Percent 0.00%' is visible.

5. Success! Event Submitted!

Finally – you will be brought to the screen below showing a summary. You can select “Done” and the notification will be removed from your Workday Inbox.

Success! Event submitted

Set Content: Goal Setting Template 07122023: C...



Process: ...

Details and Process

For

Overall Process: Goal Setting Template 07122023: Colleen Tudor

Overall Status: Successfully Completed

Due Date: 07/27/2023

Details | **Process**

Current Process: Set Content: Goal Setting Template 07122023:

Process Status: Successfully Completed

Due Date: 07/15/2023

Calendars In Use: Consecutive Days (No Calendars Selected)

Process History: 2 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Set Review Content for Performance Review	Set Review Content for Performance Review	Submitted	07/13/2023 11:42:05 AM	07/15/2023		1	
Set Review Content for Performance Review	Review Goals Set by Manager	Submitted	07/13/2023 12:20:41 PM	07/15/2023		1	

Done