

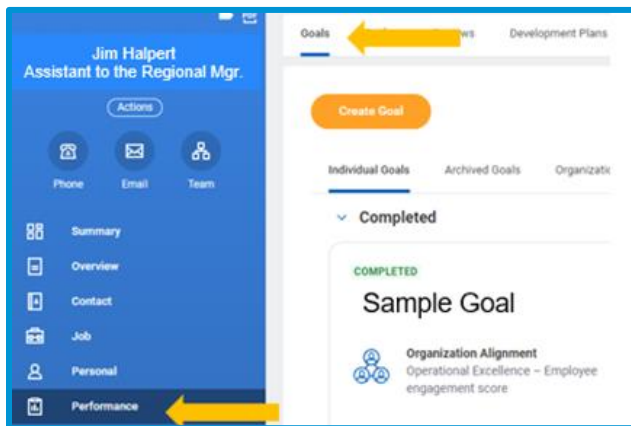
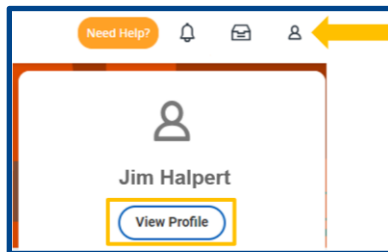
Performance: Add, Edit or Revise Individual Goals

When entering an individual goal in Workday, you need to choose a **Strategic Priority (Category)**. If you're not sure which one to pick, ask your direct supervisor to make sure your goals align with your department/team goals and your areas of responsibility.

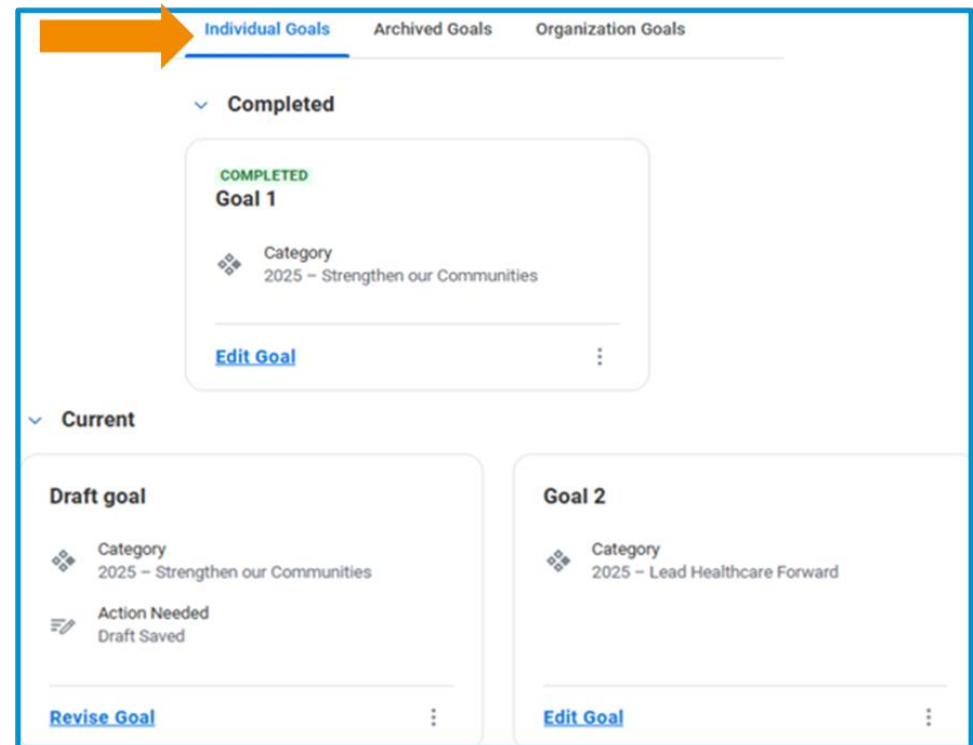
- Goals are set **annually**.
- You are required to have **at least 2 individual goals**.

ACCESS THE GOALS TAB

1. Select the **Profile** icon on the top right of your screen.
2. Select **View Profile**
3. Select **Performance** from the menu on the left
4. Select **Goals** from the tab at the top.



5. From the **Individual Goals** tab, you will see previously created goals in two different categories:
 - a. **Completed:** goals with a **Status of Completed** and a corresponding **Completed On** date.
 - b. **Current:** includes **Draft goals not submitted** and **require action**, goals with a **Not Completed Status** or goals with **no**



Status.



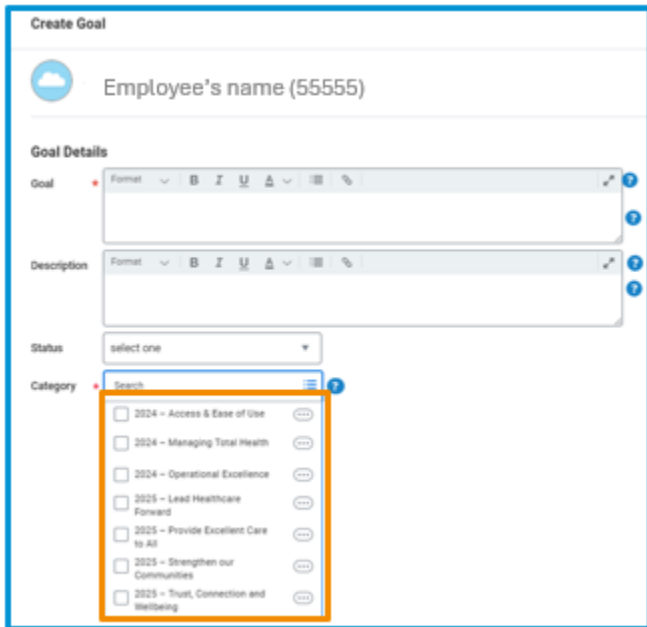
Note: Draft goals will **not be visible to your leader** until the goal is revised and **submitted**.

Performance:

Add, Edit or Revise Individual Goals

ADD GOALS

1. To add a new goal, select  the 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, select Not Completed or Completed
 - i. A Completed status will require you to add a date for when the goal was completed.
 - d. **Category:** aligns with the **current calendar year** and refers to **one of Geisinger's Strategic Priorities**



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



- a. Select **Cancel** if you want to **discard** the information you entered. The goal will **not be saved**.
- b. Select **Save for Later** to save your information if it needs further edits or discussion with your leader before finalizing. The goal will appear as a task in your Workday inbox and shows as '**Draft Saved**' on the Individual Goals tab. For more details, refer to the [Revise Goal](#) section.
- c. Select **Submit** for **finalized** goals to become **active and visible to your leader**.

EDIT GOALS

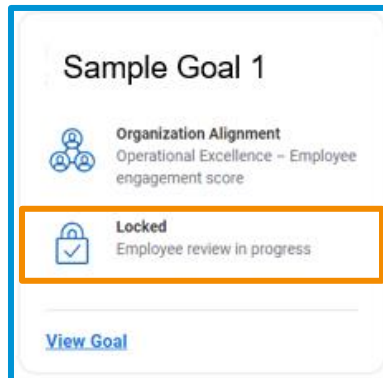
1. If you want to edit a previously submitted goal, click on the **Edit Goal** option at the bottom of the respective goal.
2. From the Goal Details page, make any changes to the Goal, Description, Status, Completed On (if the Status is Completed), and Category (Strategic Priority)
3. Once your changes are completed:
 - a. Select **Submit** for your **changes to be saved and become active**. When the changes become active, your leader can also view these updates.
 - b. Select **Save for Later** for your **changes to be saved without making them visible to your leader**. The goal will display as "**Draft Saved**" To make the goal active, use the [Revise Goal](#) option and select **Submit**.

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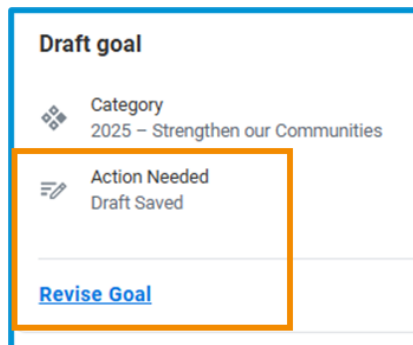


Note: Once a goal is associated with a performance review, it becomes locked and can no longer be edited from the Goals page. Any changes must be made on the current performance review.



REVISE GOAL

1. If you want to **revise and submit** a **Draft goal** that was “**Saved for Later**,” click on the **Revise Goal** option for the goal.
2. 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.
3. Once your changes are finalized:
 - a. Select **Submit** for your goal to become **active and visible to your leader**.



ADDITIONAL GOAL FUNCTIONALITY

1. Additional functionality is available for any goals **not associated with an active performance review**. Select the  (three dots) at the bottom of the goal. Some options include:
 - a. **Delete goal** – use this option to permanently remove the goal from Workday. Once deleted, it cannot be restored.
 - b. **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.
 - c. **View goal** – use this option to view the content of the goal without making any edits or updates to the content of the goal.

