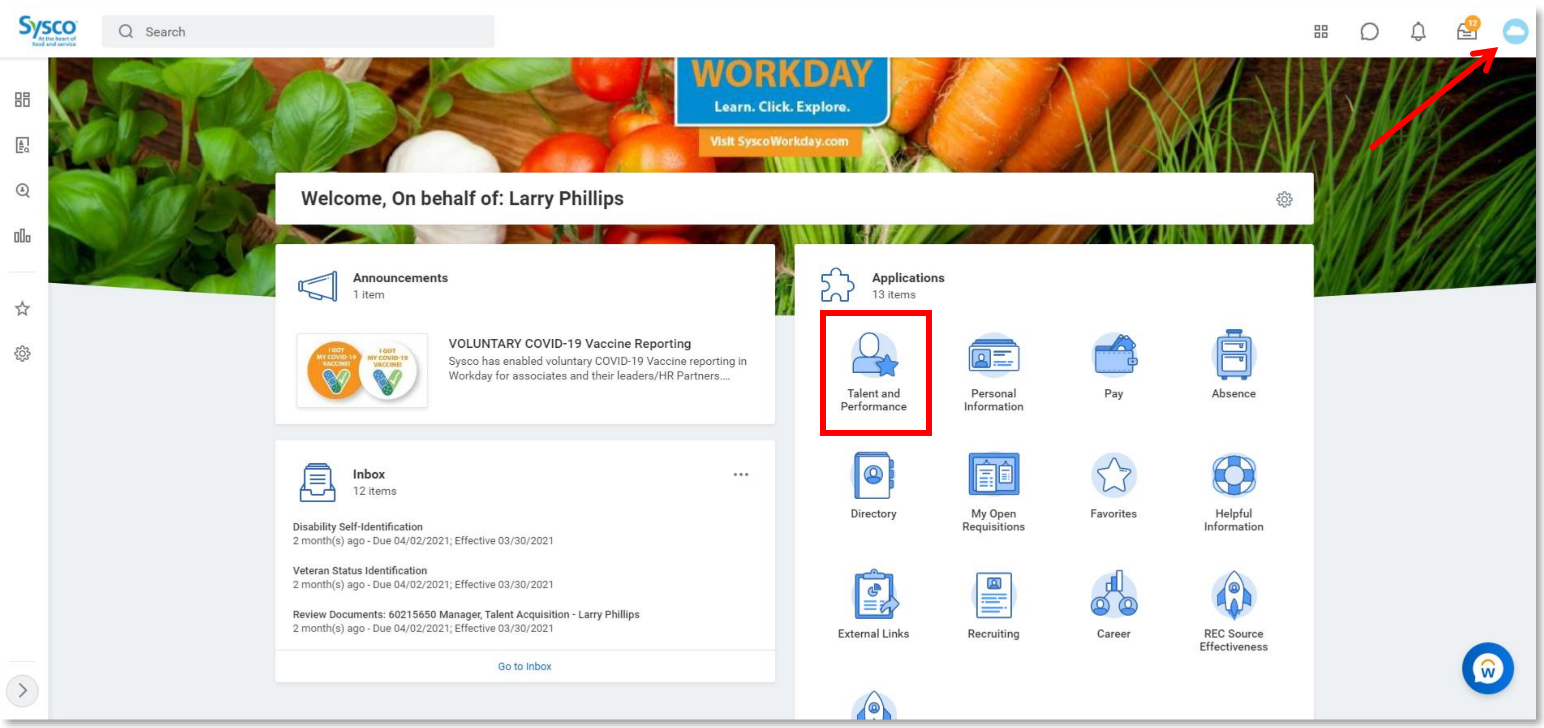
Associate Goal Setting Guide – Ad Hoc Goals

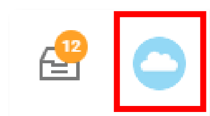
All associates with access to Workday will input their CMP goals into the system beginning FY22. Most associates will have an Inbox task delivered to them. In the case that they don't goals can be added Ad Hoc. Follow the steps in this guide to add an Ad Hoc goal.

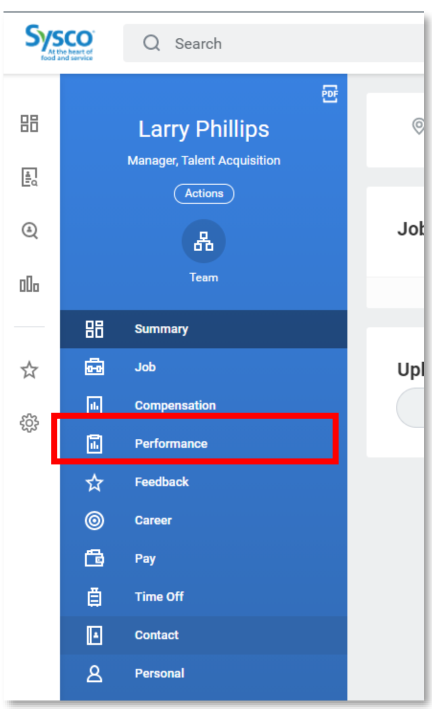
Workday Homepage



To input your goals:

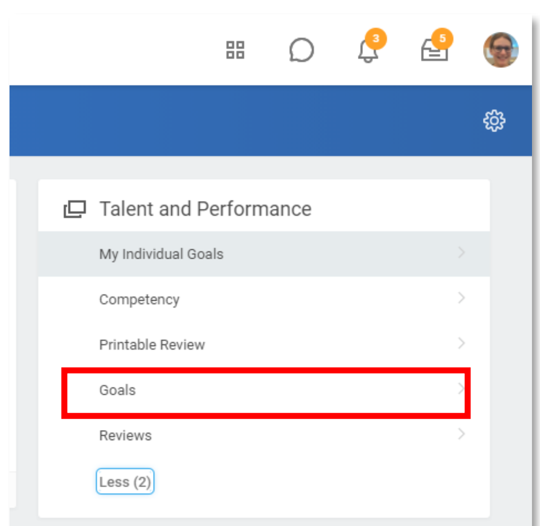
1. Access Talent and Performance, you can select your **Profile icon** (Displays as an image or a blue circle with white cloud), or the **Talent and Performance tile**





- If going through your profile, select the **Performance tab** on the middle-left side of your profile page

- If going through the Talent and Performance tile, select the **Goals tab** from the middle-right side of the Talent and Performance page



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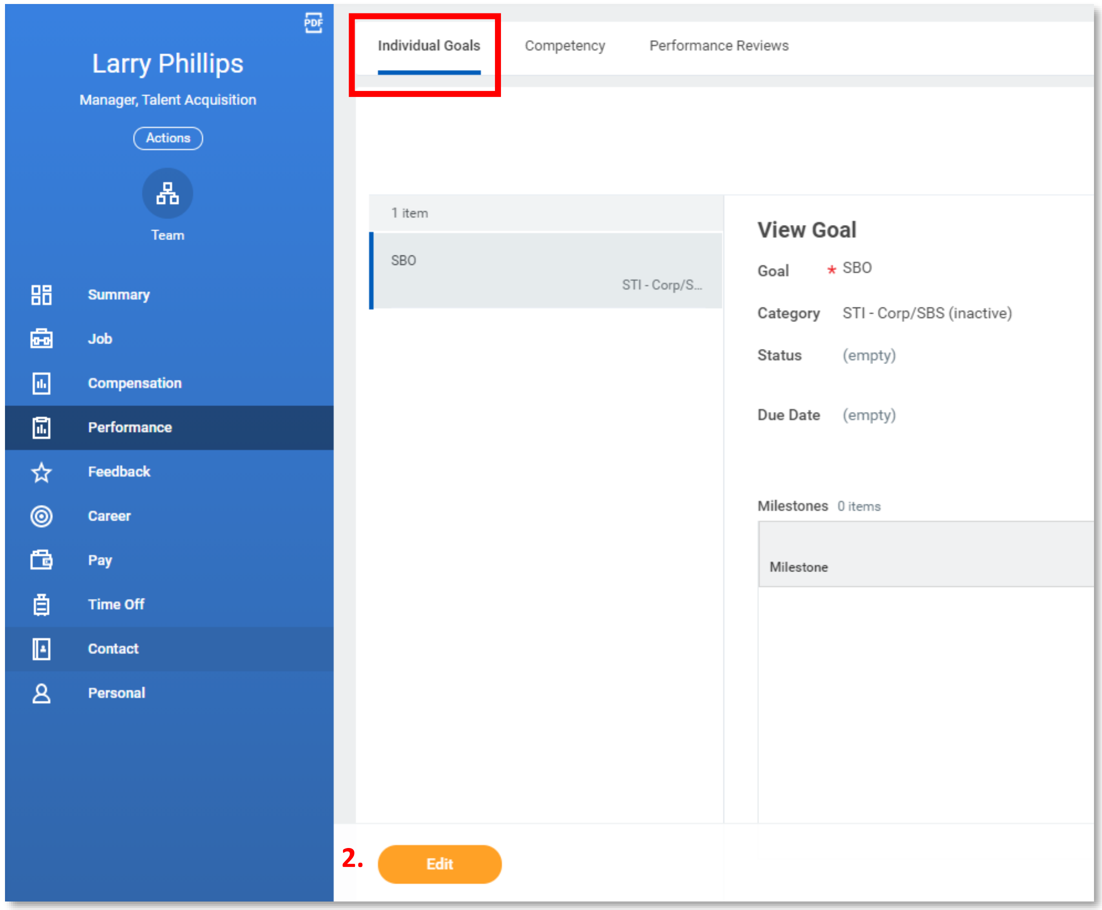
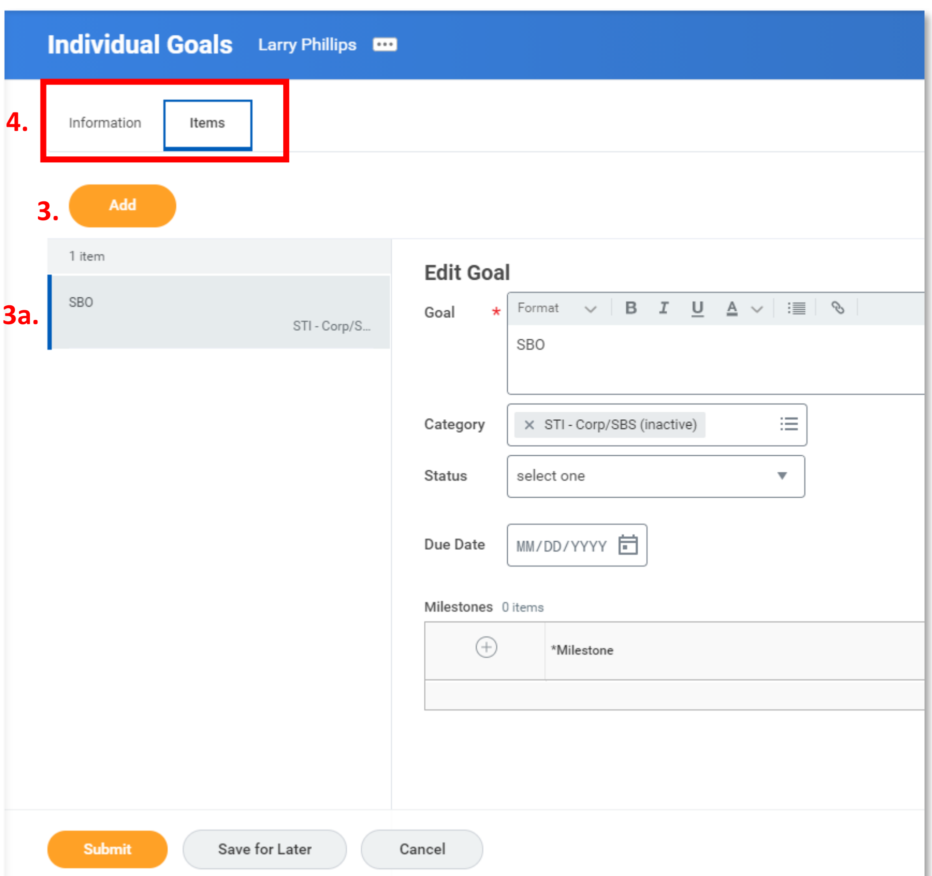
2. Add/create a goal by selecting **Individual Goals tab** from the top ribbon (Workday defaults to Individual Goals) **>** Select **Edit**

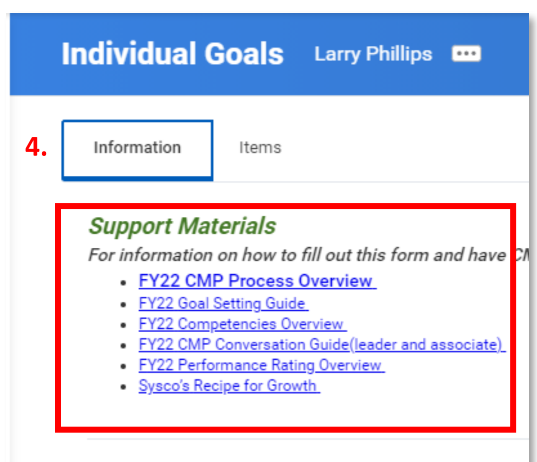
3. Under **Individual Goals**, select to **Add** a goal at the top. [See image below]

   a. Select a specific goal from the side to edit.

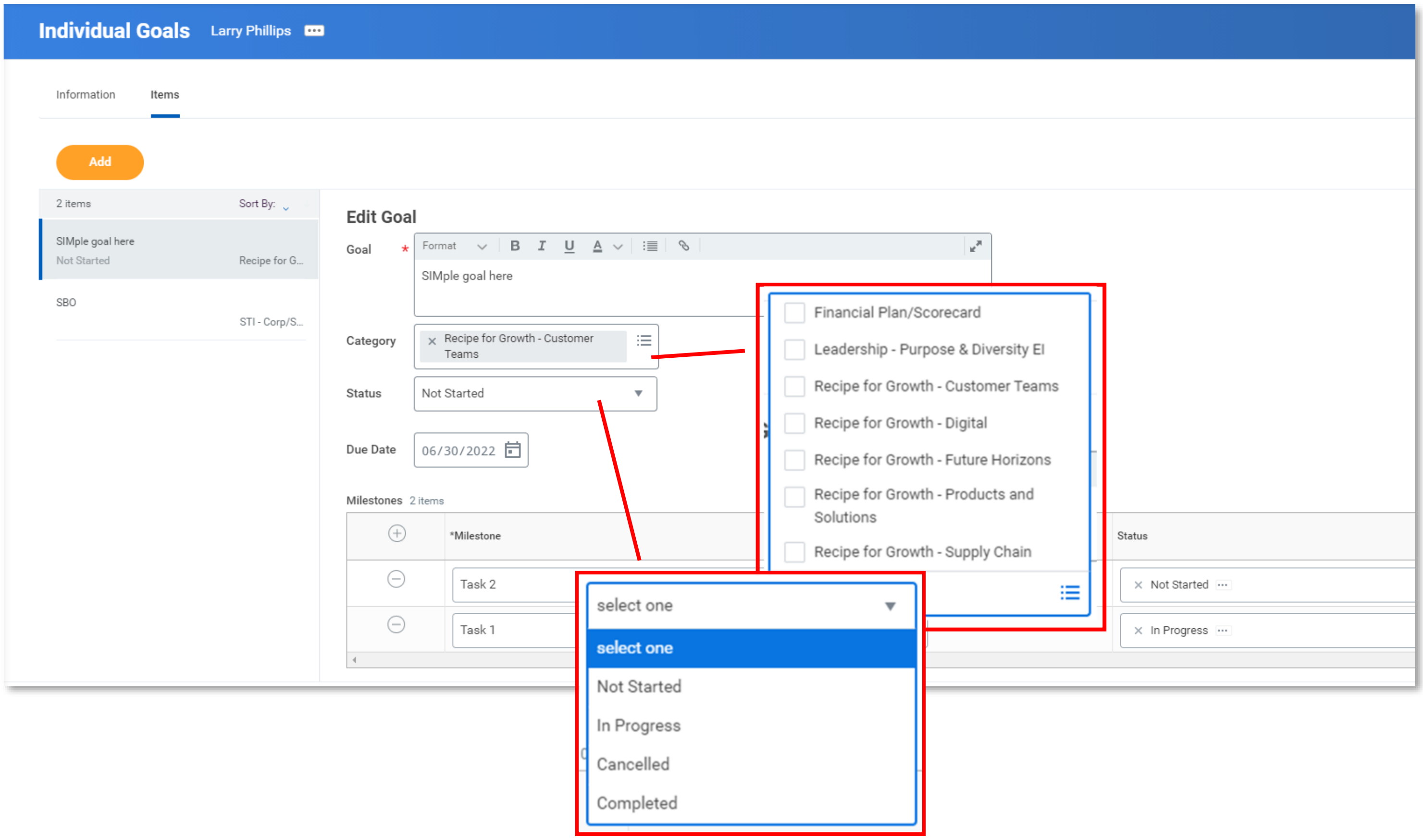


4. In your Individual Goals section, the top has two tabs, **Information,** and **Items** – Workday defaults to Items, when you select the Information tab you find links to support materials.

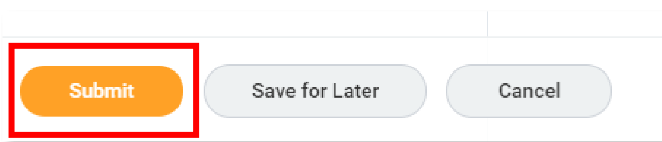




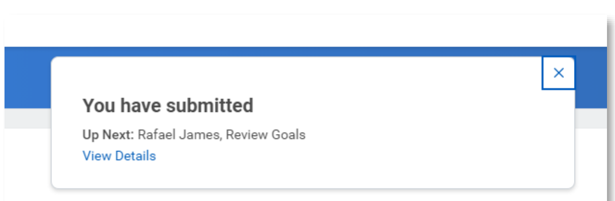
5. Fill in all fields: **Goal**, **Category**, **Status, Due Date** (typically the end of the FY), and **Milestones** (if available).



6. When done, select **Submit** to send a notification to your manager to review and approve.
You can select **Save for Later** if your goal information is incomplete or select **Cancel** if you would like to discard the goal creation/changes.

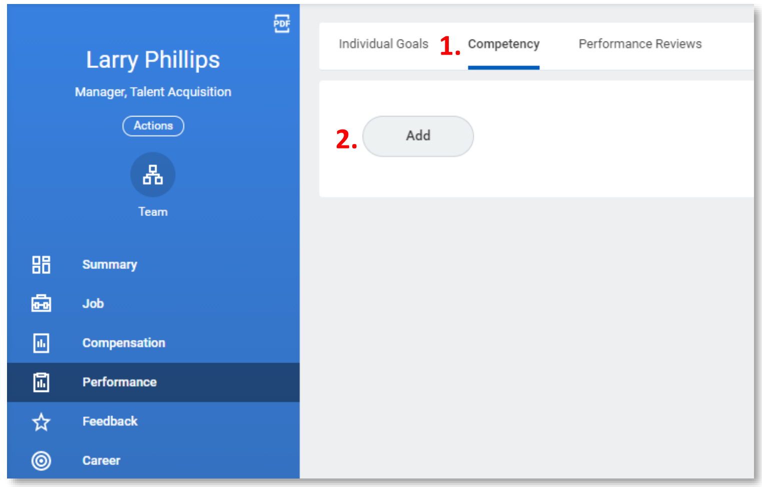


7. When you select Submit, you will see a pop-up notifying you that it has been sent to your manager for review.

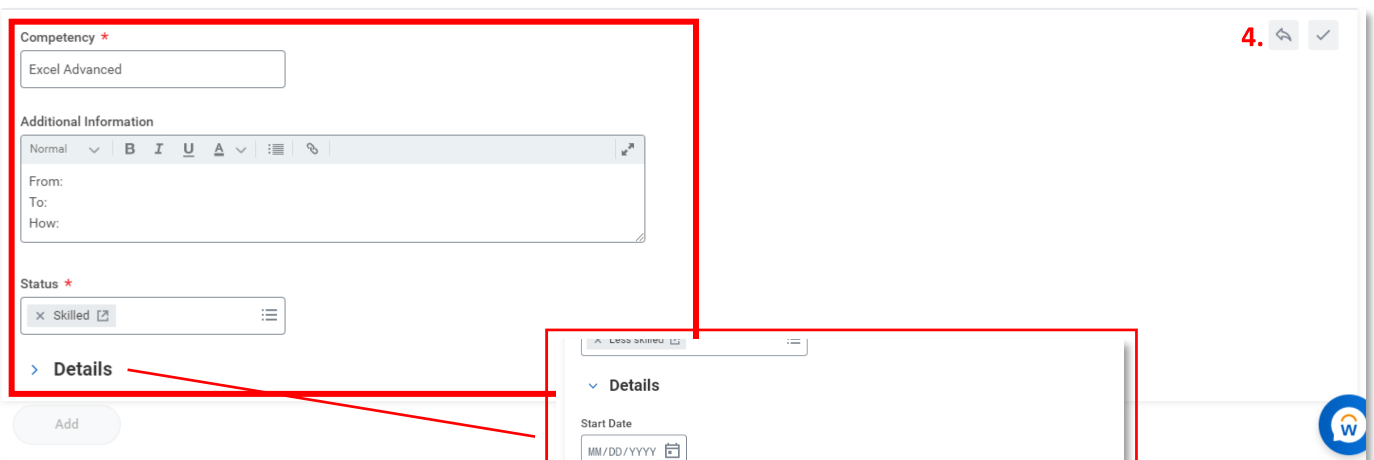


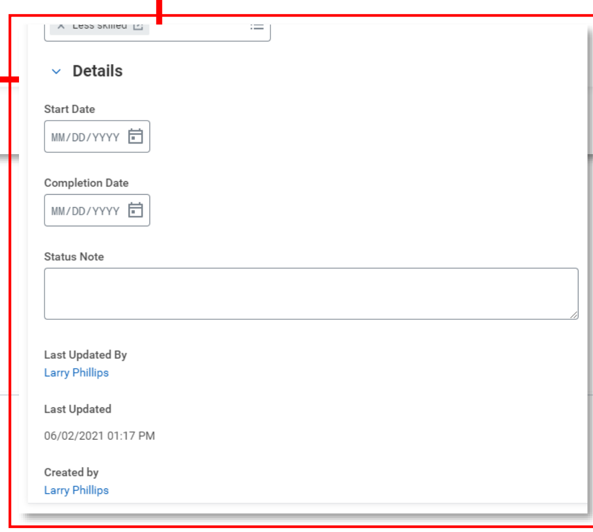
Competencies/Skills:

1. On the Performance page, select the **Competency tab** from the top.
2. Select **Add** to create a new Competency/Development Item.

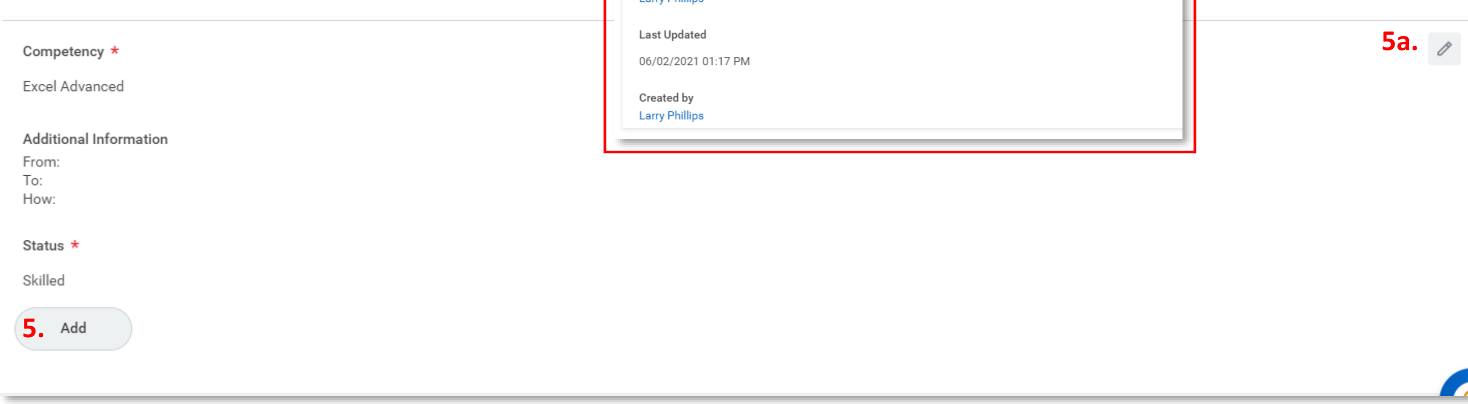


3. Fill in all needed information: **Competency** (or Skill), **Additional Information** (From, To, How), **Status** (Unskilled, Skilled, Talented, Overused), and any additional **Details.** (To add comments, tasks, or events select Details.)
4. When all information has been put in, Select the **Check Mark** in the top right corner.





5. To submit, select the **Add** button
   a. Select the **Pencil icon** to edit.



Performance Reviews:

On the Performance page, the **Performance Review tab** at the top shows all past performance reviews input into the system.