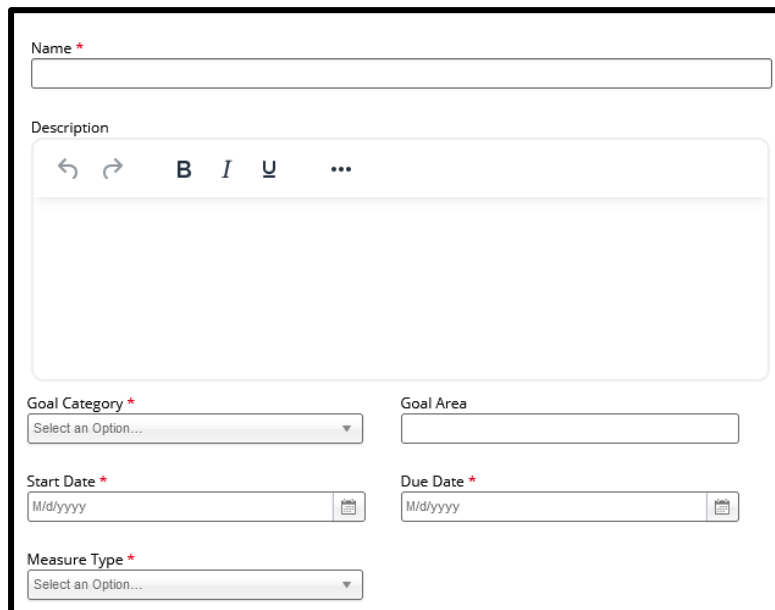


Performance Goals in Dayforce

Performance Management Module

Introduction

In **Performance > Goals**, employees can draft, create, and track progress and record key events on goals. Additionally, employees also have the option to include their own personal goals and align them with other goals, such as organizational goals, if applicable.



The screenshot shows a web form for creating a performance goal. It includes the following fields and controls:

- Name ***: A text input field.
- Description**: A rich text editor with a toolbar containing undo, redo, bold (B), italic (I), underline (U), and a menu icon (three dots).
- Goal Category ***: A dropdown menu with the text "Select an Option...".
- Goal Area**: A text input field.
- Start Date ***: A date input field with the placeholder "M/d/yyyy" and a calendar icon.
- Due Date ***: A date input field with the placeholder "M/d/yyyy" and a calendar icon.
- Measure Type ***: A dropdown menu with the text "Select an Option...".

When creating a goal, you will be required to enter the following information:

Goal Name: This should be a brief summary of your objective.

Goal Category: Current options are Development, Job Knowledge, and Teamwork

Start and Due Date: Start and due dates that fall within the annual review period will be pulled in the corresponding performance review.

Measure Type: This assigns a measurement type for tracking progress towards your goal. Dayforce has the below options for tracking goal progress:

- **Percentage:** Progress is measured by percentage. For example, the goal of "Complete XYZ System Training Manual" can have a percentage progress, so that the user can regularly update how close they are completing the document.
- **Actual / Target:** Progress is measured by a numerical target. For example, the goal "Complete outreach to 5 local schools" could use this measurement method, and then users can match their actual performance against the numeric target.
- **None:** Progress is measured using the **Not Started, In Progress, and Completed statuses**, but further detail is not recorded. For example, the goal "Complete my First Aid Certification" could have this measure type selected because users either pass the certification test or not; there is no detailed progress to measure.

Working With Goals in Dayforce

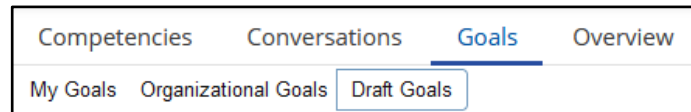
Creating a Goal

1. Go to **Performance**
2. Click the **Goals** tab
3. Click on **My Goals** sub-tab.
4. Click on **Add Goal**.
5. In **Name**, type the name of the goal.
6. In **Description**, write out a description of the goal that answer the question of what is to be accomplished.
7. In the **Goal Category** list, choose the appropriate category. Currently, goal categories are Development, Job Knowledge, & Teamwork.
8. Optional: In the Goal Area field, use the free text field to further categorize the goal if an additional tag on the goal is helpful to keep goals organized.
8. In **Start Date** and **Due Date**, choose dates that correspond to the annual review period (Oct 1 – Sept 30).
9. In the Measure Type list, choose the appropriate measure type.
10. Click **Next**

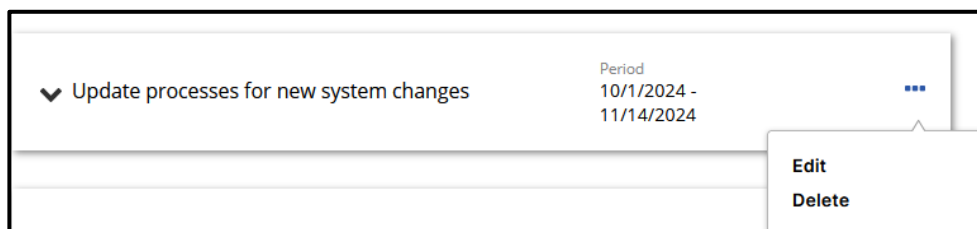
Add Tasks to a Goal as appropriate to details the activities required to complete the goal.

Save an In-Progress Goal

Employees have the option to save draft copies of their in-progress goals. To save a goal as a draft, click **Save as Draft**. When you do this, the goal is added to the **Draft Goals** tab, where it remains in an unpublished state.



To access your in-progress goal, select the **Draft Goals** sub-tab to open your list of drafted goals. The option to edit or delete your draft can be accessed through the menu button on the left of the goal (as pictured below).



Update Progress in the My Goals Tab

To update a goal's progress in the **My Goals** tab, do one of the following in the status section, depending on which measure type it has:

- **Percentage:** Move the slider to a different percentage or enter a percentage (including up to two decimal places) in the text box beside the slider. You can enter a percentage in the text box that exceeds 100% (for example, for when a user is over target). In this case, the maximum allowable amount you can enter is 999.99.
- **Actual/Target:** Move the slider to adjust the actual completed value or enter a specific actual completed value in the text box beside the slider.
- **None:** Select **Not Started**, **In Progress** or **Completed** from the **Status** drop-down list.

When you're finished updating the progress, click outside of the panel. Dayforce refreshes the goal panel with the new progress and displays a new activity record when you click **Show Goal Updates** in the **Conversations** slide-out panel.

Employee Name	Status	Progress
Albert Test	In Progress	71%

Goal Details

Active: Yes Status: In Progress Progress: 71%

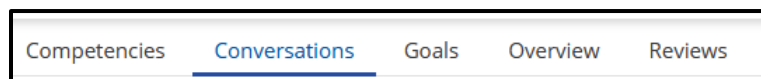
Sort | Hide Goal Updates

Write a comment. You can type "@" to tag an employee or "#" to tag a keyword.

Goal Progress updated from 50% to 71% Friday, November 1, 2024 at 8:39 AM
by Albert Test | JAO - Joint ALMA Office - ALMA Program Mgt Group Manager

Add and View Goal Conversations

In the **Performance > Goals** feature, you can engage in ongoing discussions with your manager and teammates about the latest updates on goal progress. Conversations are displayed separately for each employee assigned to a goal. The conversations shown in the tabs of **Performance > Goals** are specific to the goal or employee. For more details, refer to the **Performance > Conversations** Job Aide.



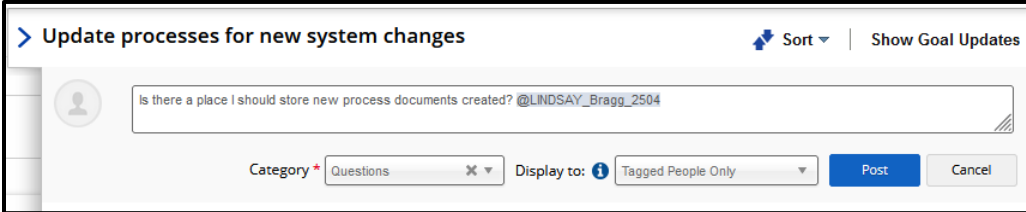
Add Conversations

To add a conversation post to a goal:

1. Go to **Performance > Goals**.
2. In the **My Goals** tab, click the conversations icon () in the goal panel. The conversations slide-out panel opens and displays all conversation posts related to the goal, based on the visibility option selected when the post was created.
3. In the conversation text box, enter the message that you want to post. If necessary, you can click the bottom right of the text field, and drag it to increase the size of the text box.


Note: There is no limit to conversation length, and spell check is provided.

4. By default, the conversation is visible to your manager, anyone you tag, and their direct managers. To change this visibility, use the **Display to** drop-down list.
5. Select a conversation category in the **Category** drop-down list.
6. Click **Post** to add the conversation to the top of the conversation list, which is ordered reverse chronologically. Or, if necessary, click **Cancel** to delete the comment before posting it.



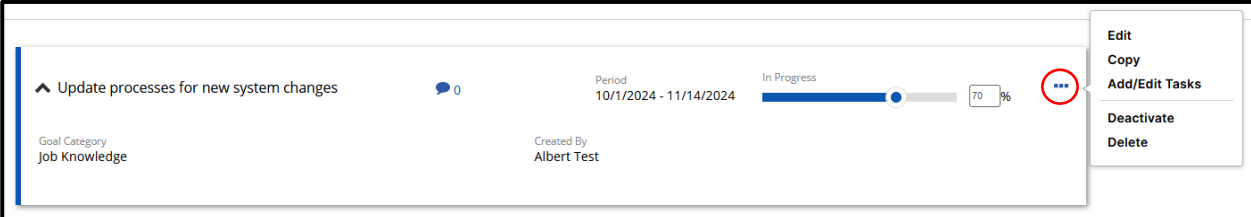
The screenshot shows a goal panel titled "Update processes for new system changes". At the top right, there are "Sort" and "Show Goal Updates" options. Below the title is a text input field containing the question "Is there a place I should store new process documents created? @LINDSAY_Bragg_2504". Below the text field are two dropdown menus: "Category" set to "Questions" and "Display to" set to "Tagged People Only". To the right of these dropdowns are "Post" and "Cancel" buttons.

Take Actions on Goals

There are several actions that you can take for existing goals in Performance. In each tab, you access the list of available actions by clicking the action icon () in the goal panel.

Depending on the tab that you're viewing the goal in, the following actions are available:

- **Edit** - You can edit an existing goal to modify its details.
- **Copy** - You can copy existing goals to create a goal with similar details.
- **Add/Edit Tasks** – You can add or edit tasks assigned to goals.
- **Deactivate/Activate** – Use to make goals that you no longer need inactive. When you deactivate a goal, it is removed from review forms that have not been locked, and which still have an incomplete manager review portion. If the review is already complete, the deactivated goal remains on the review form.
- **Delete** - You can only delete goals that you created. If other users are assigned to the goal, you can still delete it, but only if no one has added progress or conversations to the goal.



The screenshot shows a goal panel for "Update processes for new system changes". The goal is in "In Progress" status with a progress bar at 70%. The goal category is "Job Knowledge" and it was created by "Albert Test". A menu of actions is open on the right side, with the "Add/Edit Tasks" option highlighted. The menu options are: Edit, Copy, Add/Edit Tasks, Deactivate, and Delete.