Objective

This tip sheet provides managers and employees with step-by-step instructions for adding, updating, archiving, or restoring goals and check-ins in Workday, and for completing performance reviews.

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Important Information:

Contact your school or center leadership for additional information about the expectations for goals and performance management. Workday is the tool to accomplish many of the HR, payroll, and other processes established by the University and school or center, but communication outside of Workday remains equally important.

Overview of Goal Management:

Goals can be added or updated at any time by either the Manager or the employee.

Goals can be created or updated within a performance review, and goals can also stand alone outside of the performance review process to track objectives and primary responsibilities of an employee throughout the year.

When a Manager adds or updates a goal, the employee will get a notification in Workday. When an employee enters or updates a goal, their Manager will get a task to review and approve the goal.

If you are an employee adding or updating more than one goal, make all your changes before submitting. In that way, all changes will be bundled for a single review by the Manager

Goals are automatically pulled into the performance review for evaluation if their due date falls within the review period. When completing the review cycle, both the employee and manager can add new or load existing goals to the review.

Managers can view all goals for their employees at any time (outside of the review process) by running the report called **My Team's Goals**.

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Overview of the Check-in process:

Check-ins enable workers to document regularly scheduled 1-on-1 meetings with direct reports and managers.

As a guideline, aim for a minimum of two check-ins per year.

Check-ins provide comprehensive supporting details for more thorough performance reviews.

Overview of the Performance Review:

The review cycle moves back and forth between the Manager and the employee. See the section of this document called Performance Review Cycle.

As each portion is submitted, comments entered in each step are visible to both manager and employee in subsequent steps.

The Performance Review includes competencies. Information on competencies is available on the HR website.

Add or Update a Goal

1. Employees can type **My Goals** into the Workday search bar.

   Managers can type **My Team's Goals** into the Workday search bar to view, add, or update goals for their employees.

   Alternatively, individual goals are accessible from the employee's profile: click Performance on the left-hand menu and select **Individual Goals**.

2. Click **Edit** at the bottom of the screen.

3. On the next screen, click **Add** for a new goal, or select an existing goal to edit

4. Complete or update the form for each goal you intend to add or edit:

   a. Name the goal.

   b. Describe the goal.

   c. Assign one or more categories.

   d. Select an appropriate status. Status choices are: Not Started, In Progress, Completed, and Not Applicable.

   e. Enter a due date.

5. Click **Add** to add another goal. You can add multiple goals in a single transaction.

6. When the goals are set as desired, click **Submit** to complete.

NOTE: Managers: If you want to update a goal for your employee, but your employee has already submitted an update, you will need to accept their update before you can enter your own update.

NOTE: Employees: Your manager will need to approve any update before a new update can be added to a goal.

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Archive or Restore a Goal

If a goal is complete, no longer needed, or entered in error, it may be archived. Archived goals will no longer appear on the list of current goals for an employee.

Restoring a goal returns a previously archived goal back to active status.

1. To archive or restore a goal, navigate to the worker profile, and click the left menu item called **Performance.** Select the upper tab called **Archive Goals**. Click **Archive Goals** at the bottom of the page. Or type **Archive Goals** into the Workday search bar.

2. In the grid, select the goal or goals you want to archive or restore.

3. Click **OK**.

The selected goal(s) will be archived or restored.

Add Goal to Multiple Employees (Performed by Managers and HR Partners)

Workday allows for cascading of goals to a target population. HR Partners and Managers may quickly create and distribute goals to a single employee or groups of employees within their supervisory organizations. Multiple goals can be created and distributed at one time via the task **Add Goal to Employees**.

1. Type **Add Goal to Employees** in the Workday search bar.

2. Select **Create New Goal**, and then enter the employees or supervisory organizations you wish to add the goal to. If selecting a supervisory organization, you may also check to include subordinate organizations.

3. On the next screen, add the Goal title, description, category, due date.

4. Check **Editable** if you wish to allow the employee and/or manager to edit the goal details on their individual record after the goal is assigned (the title, description, category, and due date entered right above). Leaving this unchecked prevents future edits to this goal.

Add Additional Employees to Goal (Performed by Managers and HR Partners)

Alternatively, additional employees may be added to a goal that has already been distributed via the task **Add Additional Employees to Goal**.

1. Type **Add Additional Employees to Goal** in the Workday search bar.

2. Select from an existing cascaded goal.

3. Add employees or supervisory organizations for additional distribution. If selecting a supervisory organization, you may also check to include subordinate organizations.

Check-Ins

Employees and Managers can type **My Check-Ins** into the Workday search bar. This screen will present options for creating a new Check-In, viewing existing Check-Ins, and archiving completed Check-Ins.

- A Check-In documents a conversation between two people. Check-ins are highly recommended to document communication between manager and direct report during regularly scheduled 1 on 1 meetings. A completed check-in is recorded in Workday, can be viewed by the participants by viewing 'My Check-Ins,' and are visible to the HR Partner in the Supervisory Organization, as needed.

- Workers can create a maximum of one (1) Check-In for a given date for each participant.

- Workers can create multiple check-in topics for each Check-In. Suggested topics can include work in progress, recent accomplishments, or challenges.

- Check-in dates can be past or future dated. Dates can be changed by either participant at any time.

- Check-in topics can contain Shared Notes and/or private My Notes.

- Workers can add and remove attachments to both Check-Ins and check-in topics.

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Create a New Check-In

1. Type **My Check-Ins** into the Workday search bar.

2. From the **My Check-Ins** page, click **Create Check-In**.

3. Select a Participant. Note: The default value is the employee's manager.

4. Check **Notify Participant** for Workday to include an automated notification to the participant when the Check In is created.

5. Select meeting date (can be in the past for a completed meeting or in the future for an upcoming meeting)

6. Add an optional description, attachments, and meeting topics. Suggested topics can include work in progress, recent accomplishments, or challenges.

7. Click **Save** to save the new Check-In.

Edit, View, or Delete an Existing Check-In

1. Type **My Check-Ins** into the Workday search bar.

2. From the **My Check-Ins** page, on the line of the check in you wish to edit, find the column called Action. Click the Edit button down arrow to select **Edit, View**, or **Delete**.

3. You can edit the date, description, and attachments.

4. You can add or remove topics, including adding shared notes or My Notes, which are private to the user.

5. To remove a topic, click the minus button at the top right of the topic.

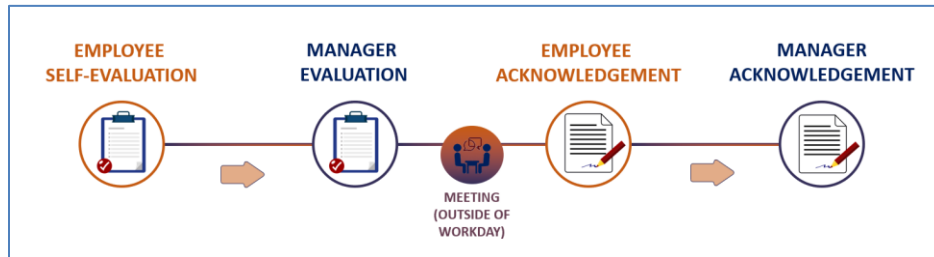6. Click **Save** to save your changes.
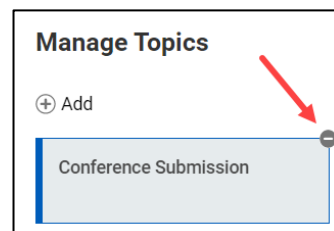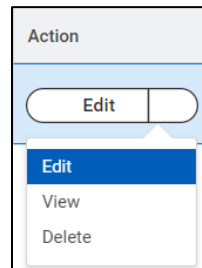
Archive or Restore a Check-In

Archiving a Check-In means the Check-In will no longer appear on the report of active Check-Ins. The information will not be deleted and the check in can be restored. Restoring an archived Check-In returns it to the active list.

1. Type **My Check-Ins** into the Workday search bar.

2. From the **My Check-Ins** page, click the **Archive Check-Ins** button.

3. Select Check-Ins from the Active Check-Ins grid to archive, or select Check-Ins from the Archived Check-Ins grid to restore.

4. Click **OK** to complete the task.

The selected Check-In(s) will be archived or restored.

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Performance Review Cycle

The performance review flows back and forth between the employee and the manager. When a review is launched, the employee will receive the initial Inbox Self-Evaluation task in their inbox.

The first step is for the employee to complete and submit their self-evaluation. Next, the manager can view the employee's self-evaluation and completes and submits their manager's evaluation. The employee can then view the manager's evaluation.

At that point, the two should schedule and hold a meeting outside of Workday to discuss the feedback that's been entered.

Finally, the employee will review and acknowledge the evaluation, and then the manager will review and acknowledge the evaluation.

At that point, the performance review cycle is complete.

Employee Self-Evaluation

From your inbox, click **Get Started**.

Goals

1. Look at existing goals that have been pulled into your performance review.
2. Update each goal.
   a. You can edit the **Goal** name, **Description, Category, Status,** and/or **Due Date**.
   b. If the **status** is completed, you will be prompted to add a **Completed On** Date.
3. Click **Add** to add a new goal or add an existing goal to be included in this review or updated as a goal for the future. A new goal requires a **Goal** name, **Description, Category**, **Status**, and **Due Date.**
4. Enter a required **Comment** for each goal.
5. Click **Next** to save and continue.

Accomplishments - Work accomplishments not assessed with your goals.

6. Click **Add** to add a new accomplishment.
   a. Add each accomplishment separately.
   b. **Comments** are not required.
7. Click **Next** to continue.

Feedback Questions - Information not included in goals or accomplishments.

8. Add an **Answer** for each Feedback question and click **Next**.

   Click here to view the Feedback Questions.

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Competencies

9. Add a **Comment** for *at least three* of the competencies associated with your position and click **Next.**

   Information on competencies is available on the HR website.

Supporting Documents

NOTE: Uploading an attachment for the entire review is *not a replacement* for completing the review sections.

10. Upload any supporting documents (optional) and click **Next**.

Review and Submit

11. Review a summary of your review and click **Submit**.

This will send the process to your manager to begin their manager evaluation.

Manager Evaluation

Goals

1. Look at goals that the employee has included as part of the review. Comments from the employee will be visible.

2. Update any goal.

   a. You can edit the **Goal** name, **Description, Category,** and/or **Status**, and **Due Date.**

   b. If the **status** is <u>completed</u>, you will be prompted to add a **Completed On** Date.

3. Click **Add** to add a new goal or add an existing goal to be included in this review or updated as a goal for the future. A new goal requires a **Goal** name, **Description, Category**, **Status,** and **Due Date**.

4. Enter a **Comment** for each goal and click **Next.**

Accomplishments - Work accomplishments not assessed with goals.

5. View accomplishments added by the employee. Comments from the employee will be visible.

6. Click **Add** to add any new accomplishments.

   a. Add each accomplishment separately.

   b. **Comments** are not required.

7. Click **Next** to continue.

Feedback Questions - Information not included in goals or accomplishments.

8. View the employee's answers to each question.

9. Add your own **Answer** for each Feedback question and click **Next**.

   Click here to view the Feedback Questions.

Competencies

10. View the employee's comments for their competencies.

11. Add your own **Comment** for *at least three* of the competencies. You can comment on the same competencies or other competencies.

12. Click **Next.**

   Information on competencies is available on the HR website.

Supporting Documents

NOTE: Uploading an attachment for the entire review is not a replacement for completing the review sections.

13. Upload any supporting documents (optional) and click **Next**.

Review and Submit

14. Review a summary of the review. Manager and Employee comments are visible. When you have reviewed the summary, click **Submit**.

NOTE: Once submitted, the employee will be able to view the manager's comments.

This will send the process back to the employee.

At that point, the employee and manager should schedule and hold a meeting outside of Workday to discuss the feedback. Updates can still be made to goals or questions, and any additional documentation can be added.

Send Back Option

To update any steps already submitted, the Manager will need to 'Send Back' the review to return to the step where the appropriate party can make changes.

The **Send Back** button is available in the report called **My Team's Performance Reviews**. Send back will send the review back one step in the Performance Review Cycle. Use Send back, again, to send the review back another step.
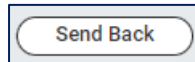
Employee Acknowledgement

The employee will see a task in their inbox called **Provide Employee Review Comments**.

1. Click **Get Started**.

2. Review the summary which includes all comments, updates, and any supporting documents.

3. Click **Next**.

4. On the Acknowledgement page, click **Status** to select Employee Acknowledgement.

Keep in Mind

Employee Acknowledgement signals that the employee **has seen** the contents of the evaluation, *not that they agree with the contents.*

5. Enter any optional **Comments** which will be visible to the Manager in the next step.

6. Click **Submit**.to send the process to the manager for their acknowledgment.

Manager Acknowledgement

The Manager will see a task in their inbox called **Provide Manager Review Comments**.

1. Click **Get Started**.

2. Review the summary which includes all comments, updates, and any supporting documents.

3. Click **Next**.

4. On the Acknowledgement page, the Manager will see the Employee's Acknowledgement and any comments entered.

5. Click **Status** to select Manager Acknowledgement.

6. Enter any optional **Comments**.

7. Click **Submit**.

This concludes the performance review process.

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View or Print Your Review

1. Navigate to your own Workday profile.

2. In the left-hand navigation panel, click **Performance**.

In-progress reviews and Completed reviews will appear in separate tables.

To print your completed review, click **Create New PDF.**
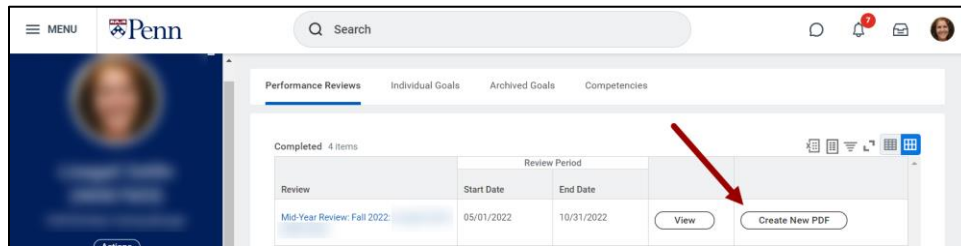
Once the PDF is generated, use the icons in the top right to download or print.

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Feedback Questions for the Mid-Year Performance Review

1. Describe the employee's biggest strengths for the last 6 months.

2. Describe any work-related challenges faced during the last 6 months.

3. Describe any areas for improvement for the next 6 months.

4. What additional support can the manager provide to enhance success in this role?

5. What professional development opportunities should be explored/identified, and when should these be completed?

6. Are there any additional comments or questions you would like to add?