



## TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

After the employee's annual evaluation or probationary 3-month evaluation process is completed, the manager will receive the following task in their Workday inbox: **Prepare to Cascade Next Year's Goals**.

The screenshot shows a 'Complete To Do' task card. At the top, it says 'Prepare to Cascade Next Year's Goals' with an 'Actions' button. Below this, it indicates '5 second(s) ago - Effective 06/14/2020'. The 'For' field is empty. The 'Overall Process' is 'AA - Managers & Supervisors Annual Review:'. The 'Overall Status' is 'Successfully Completed'. The 'Instructions' section states: 'You have completed the Annual Review. Now is the time to cascade next year's goals to your employees. Click the Task appearing below this message; OR access to the task Add Goals to Employee in the Team Performance worklet.' At the bottom, there are three buttons: 'Add Goal to Employees' (orange), 'Submit' (orange), 'Save for Later' (grey), and 'Close' (grey).

**The manager and employee must discuss and agree upon goals for the upcoming year before entering them into Workday.** This discussion may take place during the 1:1 discussion in the evaluation process. It may feel natural, after reflecting on the past year (or 3 months for probationary employees) to then discuss the upcoming year. The discussion about the upcoming year may also be held in a meeting separate from the evaluation process.

Set two to five goals which are job-oriented. Keep in mind the goals should:

- Support the mission, vision, initiatives
- Be challenging and attainable
- Have specific, explicit measures
- Have objectives that can be achieved within the assessment cycle
- Identify resources needed

### MANAGER: ADD GOAL

- Navigate to **Add Goal to Employees** either by:
  - clicking on the **Add Goal to Employees** button in the inbox item or
  - searching for **Add Goal to Employees** in the Workday search bar or
  - accessing **Add Goal to Employees** in the Team Performance Worklet
- Select **Create New Goal**

The screenshot shows the 'Add Goal to Employees' modal window. It has a blue header with the title 'Add Goal to Employees'. Below the header, there are two radio buttons: 'Create New Goal' (selected) and 'Copy Existing Goal'. To the right of the 'Copy Existing Goal' button is a search bar. Below this, there is a section titled 'Assign To' with two fields: 'Employees' and 'Organizations'. The 'Employees' field has a search bar with a dropdown arrow. The 'Organizations' field has a search bar with a dropdown arrow. At the bottom, there are two buttons: 'OK' (orange) and 'Cancel' (grey).



## TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

- Select who the goal will be **Assigned To**.
  - Type the employee's name in the **Employees** field or select the employee's name from the **My Team** list
  - You may select multiple employee names if you are assigning the same goal to multiple people.
  - You may choose an entire department by searching in the **Organizations** field.

**Add Goal to Employees**

☒ Create New  
☐ Copy Existing

**Assign To**

- My Team
- Workers by Manager
- Workers by Manager Hierarchy
- Workers by Supervisory Organization
- Workers by Supervisory Organization Hierarchy
- Employee Name

**Employees**

**Organizations**

### MANAGER: ADD GOAL DETAILS

The **Assign To** header confirms who the goal will be assigned to. Click on the number to see the employee's names.

- Add the name of the goal in the **Goal** field
- Add a description in the **Description** field
- Add a **Due Date**
- **Editable** should remain checked
- Click **Add** to add another goal or **Submit** to proceed

**Add Goal to Employees**

**Assign To** 1

**Goal** \*

**Description**

**Due Date** MM / DD / YYYY

**Editable** ☒

**Remove** **Add**

**Submit** **Save for Later** **Cancel**



## TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

### EMPLOYEE: REVIEW GOALS

- Review Goals
- Make edits, if needed
- Add **Status**, as desired
- Alternate between multiple goals on the left-hand side
- Click **Add** to propose a new goal
  - Add the name of the goal in the Goal field
  - Add a description in the Description field
  - Add a Due Date
  - Editable should remain checked
- Click **Approve**

### MANAGER: APPROVE GOALS

- Review Goals
- Click Send Back, if needed, to send back to the employee. Comments are required.
- Make edits, if needed
- Add **Status**, as desired
- Alternate between multiple goals on the left-hand side
- Click **Add** to propose a new goal
  - Add the name of the goal in the Goal field
  - Add a description in the Description field
  - Add a Due Date
  - Editable should remain checked
- Click **Approve**. Goals are now final.

- Click Submit on the Prepare to Cascade Next Year's Goals task in your Workday inbox.

**Note:** For probationary employees, you will receive this task after the 6 and 9-month evaluations. If you are not adding more goals, simply click Submit.



### EMPLOYEE: UPDATE GOALS

Throughout the year, an employee may choose to add progress updates to the goal. These updates may assist the employee and manager in providing a rating during next year's evaluation process.

- Navigate to **My Goals** either by:
  - Searching for **My Goals** in the Workday search bar or
  - Accessing **Goals** in the Performance Worklet
- Alternate between multiple goals on the left-hand side
- Click **Edit**
- Enter updates in the **Description** field. Include the date of the update.
- **Milestones** break a large goal down into manageable action items. These are optional. Add as desired.

- The updates are routed to the manager for approval.

### MANAGER: APPROVE UPDATES

- Click on the Goal on the left-hand side
- Read the updates
- **Approve** or Send Back