



Managing Prior Year Goals in the Annual Evaluation

If your prior year goals were not archived before the start of this year’s current annual evaluation process, which kicks off with self-evaluations in June, they will auto-populate to your self evaluation. Follow the steps below to update these goals so that they do not impact your annual evaluation overall rating.

From the Home Page:

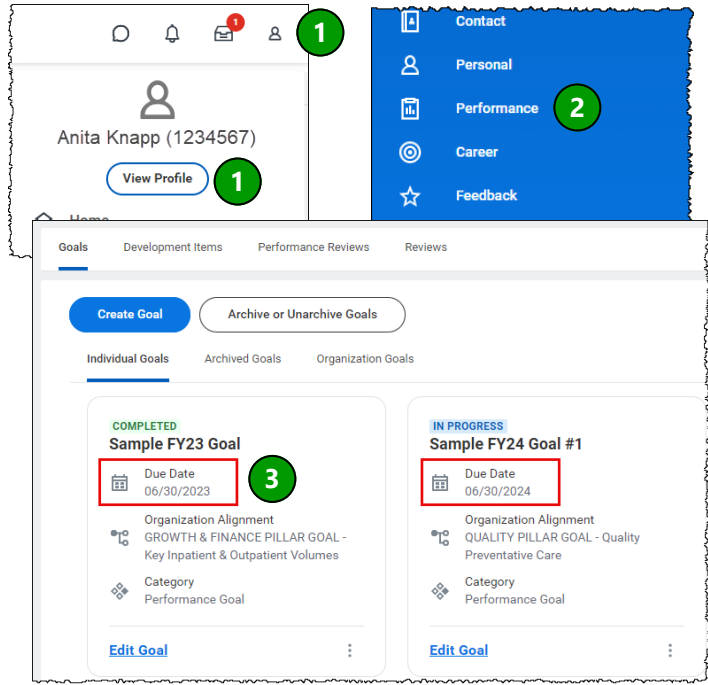
Employees:

- To review whether you have active prior year goals, go to your **employee profile**.
- Select **Performance**.
- Goals will appear. Look at the **Due Dates** for each of the goals to determine the fiscal year of the goals.

Note: Prior year goals cannot be archived or deleted from your Profile if they have not been archived before the start of the current evaluation period.

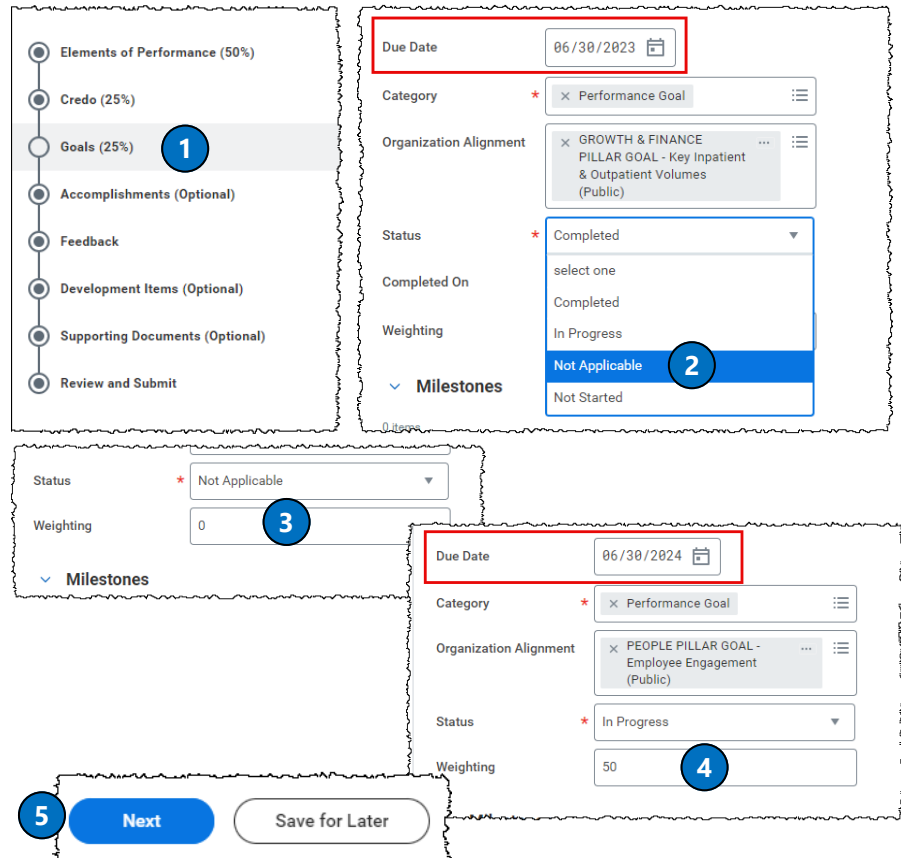
Managers:

Note: Managers can run **My Team Goals** from the search bar in Workday to view the goals for their team and review due dates of goals.



From the Evaluation:

- Select the **Goals** section using the menu on the left.
- If you have prior year goals that were not archived, they will populate here. Pay careful attention to the **Due Date**. For each prior year goal, change the **Status** to **Not Applicable**.
- After selecting Not Applicable, the weight will update to **0**. Repeat steps 2 and 3 for all additional prior year goals that populate on the evaluation.
- As needed, adjust the remaining current year goal weights so that the **total equals 100**. (e.g., if you have 2 goals, they would each be weighted at 50.)
- Select **Next** to continue the evaluation and save the changes you made, or select **Save for Later** to save the changes and complete at another time.



QUESTIONS?

Please email BusinessEducation@vumc.org.