Staff Member
Fall To-Do Checklist

☐ Clean up old goals

- ☐ **Review all goals on the Individual Goals screen**
  - ☐ For each goal:
    - ☐ If blank, enter a category
    - ☐ If blank, update the status – "Not Applicable," "Incomplete," "Partially Complete," "Successfully Complete"
    - ☐ If "Successfully Complete" and blank, enter the date by which the goal was completed.
    - ☐ If blank, enter the date the goal was due

☐ Meet with supervisor

- ☐ **Prior to the meeting, obtain a copy of your job description from your supervisor (or in the alternative, access your job description in Workday)**
- ☐ **Discuss any changes to the job description**
- ☐ **Discuss current competencies**
  - ☐ Determine if competencies should be changed based on current role/job description
  - ☐ Remind supervisor to edit competencies, if necessary
- ☐ **Discuss goals**
  - ☐ Discuss goals that support your role and align with department objectives
  - ☐ Discuss how goals will be measured
  - ☐ Discuss how successful completion of goal will be applied for the benefit of the department, division, or University

☐ Determine who will draft SMART goals and enter into Workday

- ☐ **If it is you, use the SMART goal worksheet**
  - ☐ Determine which goals will be prioritized for the current evaluation year
  - ☐ Discuss the applicable categories for the goals
  - ☐ Discuss the weighting of each goal that will be evaluated for the current evaluation year (total weight of goals shall not exceed 100)
  - ☐ Determine a date by which the SMART goals will be drafted and reviewed
- ☐ **Provide drafts to supervisor**
- ☐ **Finalize the drafts in a follow-up meeting**
  - ☐ Discuss any edits to the SMART goals
- ☐ **Follow the instructions "How to Add, Edit and View Goals" to enter into Workday**

☐ Maintain SMART goals in Workday

- ☐ **As you make progress toward completion of the goal(s), make updates, as necessary**
- ☐ **Check notifications for cascaded goals and approval of updates to goals**

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