



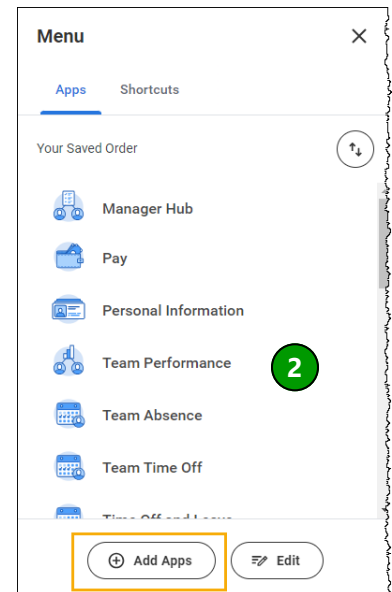
## Setting Goals on Behalf of Employees

Workday allows Managers to set goals on behalf of their individual direct reports or for all employees belonging to their Supervisory Organizations (i.e., Department(s)) they manage. While goals can be assigned at any point during the fiscal year, they play a role in the Annual Performance Review. Follow the steps below to set a goal on behalf of employees and view statuses of team goals.

### From the Home Page Menu:

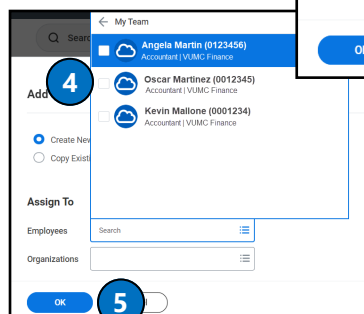
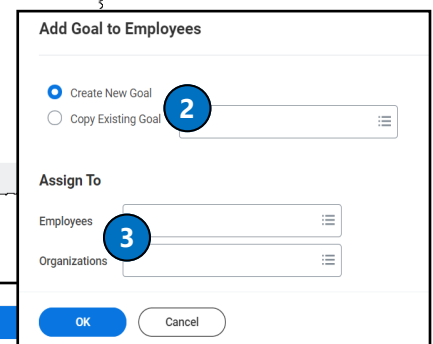
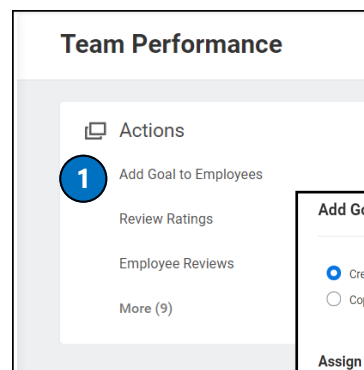
1. Select the **Menu** icon which will take you to the various applications provided through the Workday System.
2. Choose **Team Performance**.

**Note:** If the Team Performance application is not visible, select **+Add Apps** at the bottom of the menu. Then you can search for **Team Performance** and select **Add**. It should appear in your applications menu once added.



### From the Team Performance Application:

1. Under Actions, select **Add Goal to Employees**.
2. A new window will appear and you can choose **Create New Goal** or **Copy Existing Goal**. Choose the appropriate option.
3. Under **Assign To**, select **Employees** to assign goals to one or more employees. Select **Organization** to assign goals to a department.
4. Follow the prompts to assign the goal to the appropriate employee or team.
5. Select **OK**.





## Setting Goals on Behalf of Employees

### Under Add Goal to Employees:

1. Type the name of the goal as you wish it to appear in the **Goal** text box. You can also add an optional description for the goal.

2. Under **Category**, select whether this is a **Performance** or **Development** goal. Only Performance Goals should be weighted and be part of the Annual Performance Evaluation.

**Note:**

**Performance Goals** are linked to an employee position's key responsibilities and align to VUMC Pillar Goals.

**Development Goals** focus on building new skills, knowledge, and abilities to improve current job performance or prepare for future career opportunities.

3. Use the **Organization Alignment** field to align the employee's goal to an existing Pillar goal.

To select a **Pillar Goal** follow these steps:

- a. Select **My Organization Goals**.
- b. Select **Office of the CEO Department**.
- c. Select the appropriate **Fiscal Year**.
- d. Select the appropriate **Pillar Goal** from the list.

4. Determine the **Weight** of the goal.

**Note:** The **total** weight of all goals **combined** should equal **100**.

5. Select the **Due Date** of the goal.

6. Ensure that the box next to **Editable** is selected. If it is unchecked, the goal cannot be edited or deleted by the manager or employee.

6. You can choose to **Add** another goal or **Remove** a goal.

7. Select **Submit** to assign the goal to the employee(s).

**Note:** Required items are marked with a red asterisk.

### Add Goal to Employees

The screenshot shows the 'Add Goal to Employees' form. It includes fields for Goal (with a red asterisk), Description, Category, Organization Alignment, Weight, Due Date, and Editable (checked). At the bottom are buttons for Remove, Add, Submit, Save for Later, and Cancel. Numbered callouts 1-8 point to these specific elements.

The image shows three stacked dropdown menus illustrating the selection path for a Pillar Goal. 
 

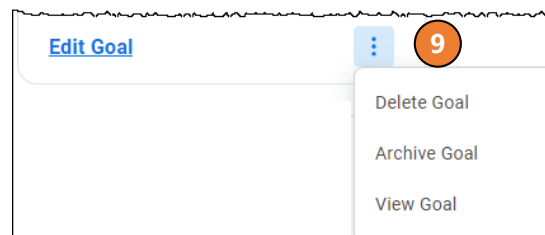
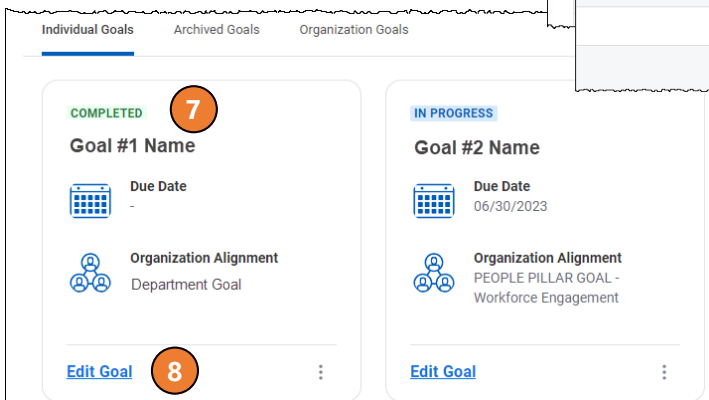
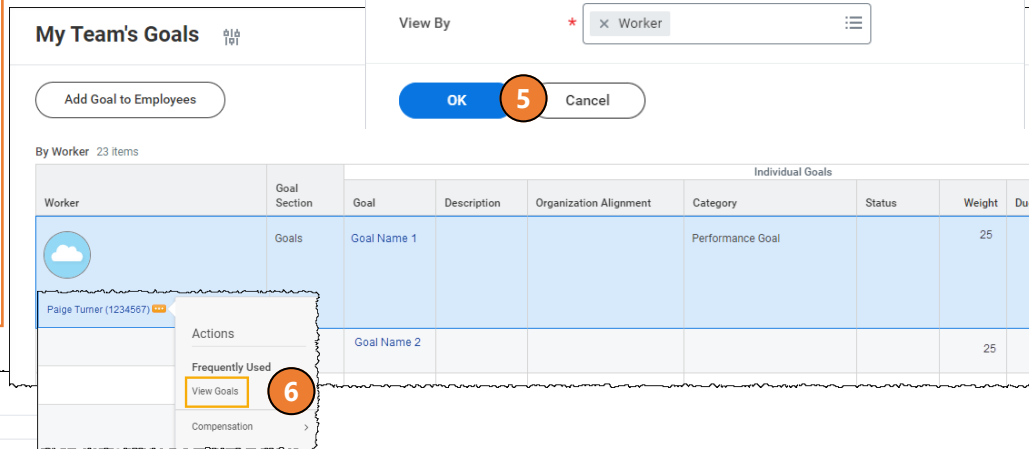
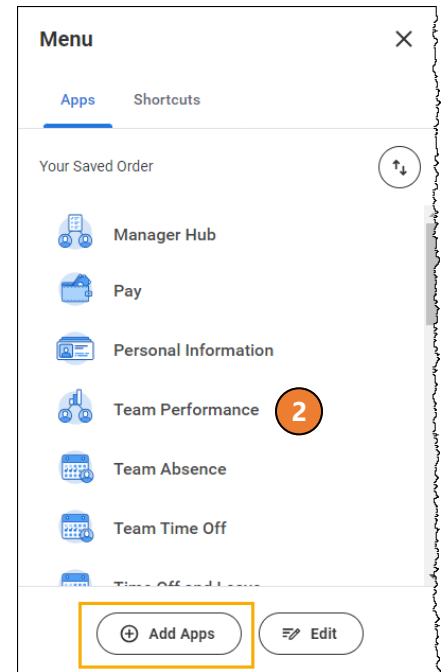
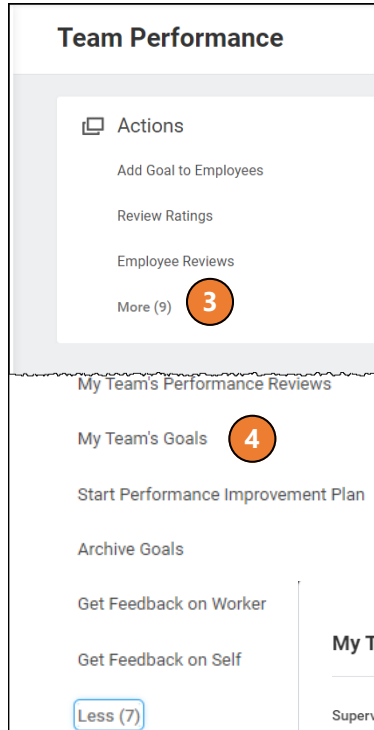
- The first menu shows 'My Organization Goals' selected (marked with 'a').
- The second menu shows 'Office of the CEO Department (Jeffrey Balser (0024032)) (S108004AA)' selected (marked with 'b').
- The third menu shows 'FY2024 Organizational Goals' selected (marked with 'c').
- The final menu shows 'GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand (Public)' selected (marked with 'd').



## Reviewing Assigned Goals for Employees

### From the Workday Homepage

1. Select the **Menu** icon which will take you to the various applications provided through the Workday System.
2. Choose **Team Performance**.
3. Under Actions, select **More**.
4. Select **My Team's Goals**.
5. Verify that the **Supervisory Organization** (i.e., Department) you are trying to view is correct along with the **View By** Category you wish to view, then choose **OK**.
6. Here, you can view the status of all team goals. Select the **Action Items** button next to the employee name, then select **View Goals** to review or edit individual goals.
7. The goals will appear as cards. The **Goal Status** is listed above the Goal Name.
8. You can select **Edit Goal** to make changes to the goal.
9. Selecting the **three dots** to the right of the goal will give you the options to **Delete**, **Archive**, or **View the Goal**.





## Archive Goals on Behalf of Employees

### From the Workday Homepage

1. Type the **employee's name** to the search bar and select the employee below.
  2. Choose **Performance**.
  3. Select **Archive or Unarchive Goals**.
- Note:** You can create individual goals for workers from this screen, as well, using the **Create Goal for Worker** button.
4. On the Archive or Unarchive Goals screen, you can choose to select individual goals to archive, you can select all of the active goals to archive, or you can unarchive any goals that have been previously archived, either by you or the employee. To select an **individual goal** to archive or unarchive, select the **check box** next to the goal. To archive or unarchive **all goals**, select the box next to **Select All**.
  5. Select **OK**.

The screenshot shows the Workday interface for Angela Martin. At the top, a search bar contains her name (1). Below the search bar, her profile information is displayed, and a dropdown menu is open, highlighting the 'Performance' option (2). Underneath, the 'View Goals for Worker' page is shown, with the 'Archive or Unarchive Goals' button selected (3). A modal window titled 'Archive or Unarchive Goals' is open, showing a table of goals. The 'Select All' checkbox for active items is checked (4). The table lists two goals: 'Goal #1 Name' (Performance Goal, In Progress) and 'Goal #2 Name' (Performance Goal, Completed). Below the table, the 'Archived' section shows one goal: 'Archived Goal' (Performance Goal, Completed). At the bottom of the modal, the 'OK' button is highlighted (5).

### From Step 2 Above

1. To archive a goal from the Goals Page, you can select the **three dots** next to Edit Goal.
2. Choose **Archive Goal**.
3. Select **OK**.
4. The goal will be archived automatically. To review the archived goals, select the **Archived Goals** tab.

The screenshot shows the 'View Goals for Worker' page for Angela Martin. The 'Archived Goals' tab is selected (4). Two goal cards are visible: 'COMPLETED Goal #2 Name' and 'IN PROGRESS Goal #1'. The 'IN PROGRESS Goal #1' card has a three-dot menu icon next to its 'Edit Goal' button (1). A dropdown menu is open, showing the 'Archive Goal' option (2). A modal window titled 'Archive Goal' is open, displaying the message 'This goal will be archived.' and 'Cancel' and 'OK' buttons (3).

### QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).

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