**VUMC BUSINESS EDUCATION**

Goal Setting in Workday—Manage Assigned Goals

Workday allows employees to view and interact with goals assigned to them. Employees will receive an automatic notification when a new goal has been assigned to them. Note that employees can access all of their individual goals at any time. Follow the steps below to learn how to view and edit your assigned goals and how to add new goals.
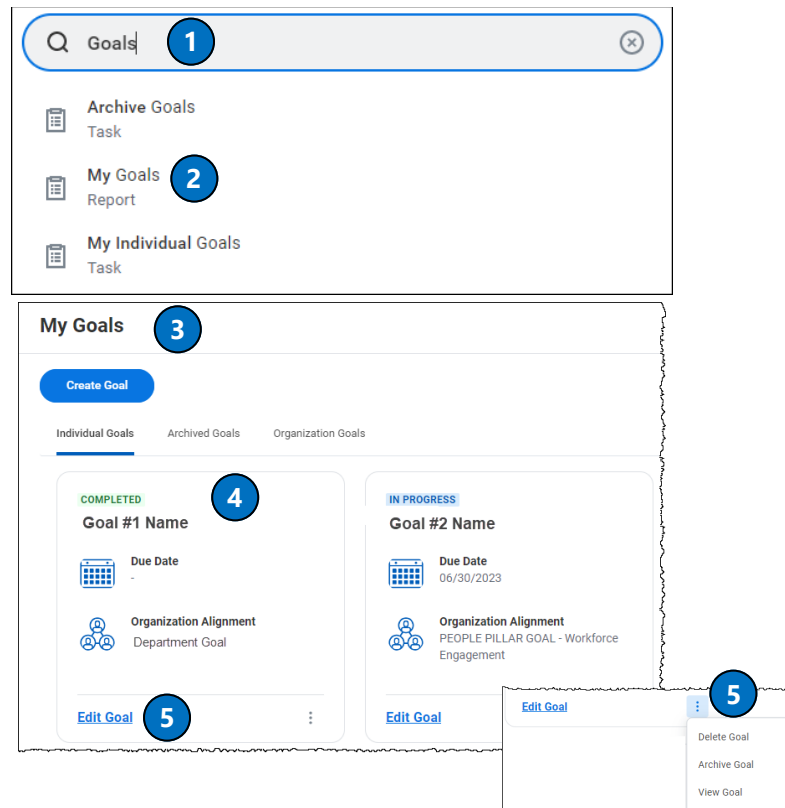

To Find Assigned Goals
From the Home Page:

1. Open your notifications by selecting the **Notifications icon**.

2. Select the **notification(s)** titled: Manage Goals.

3. Select **View Details**.

4. You can view the details (e.g., goal title, goal description, status) of the goal.
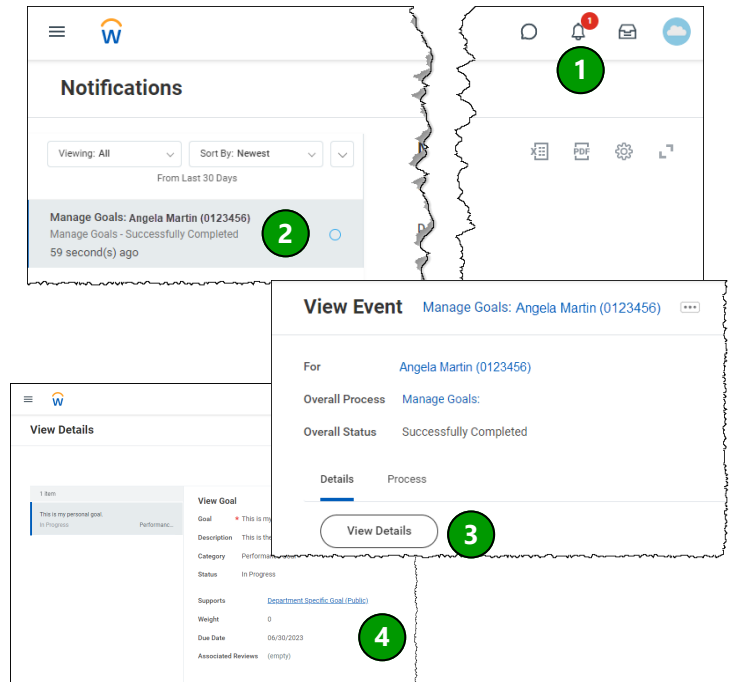

To Find All Goals
From the Search Bar:

1. In the search bar, type **Goals.**

2. Choose the **My Goals report**.

3. **Individual Goals** will automatically appear on this page.

Note: you can select **Create Goal** to create a new goal for yourself. You can also review any **Archived Goals** and **Organization Goals** (i.e., Pillar Goals).

4. The goals will appear as cards. The **Goal Status** is listed above the Goal Name.

5. You can select **Edit Goal** to make changes to the goal.

6. Selecting the **three dots** to the right of the goal will give you the options to **Delete Goal**, **Archive Goal** or **View Goal**.

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To Find All Goals -
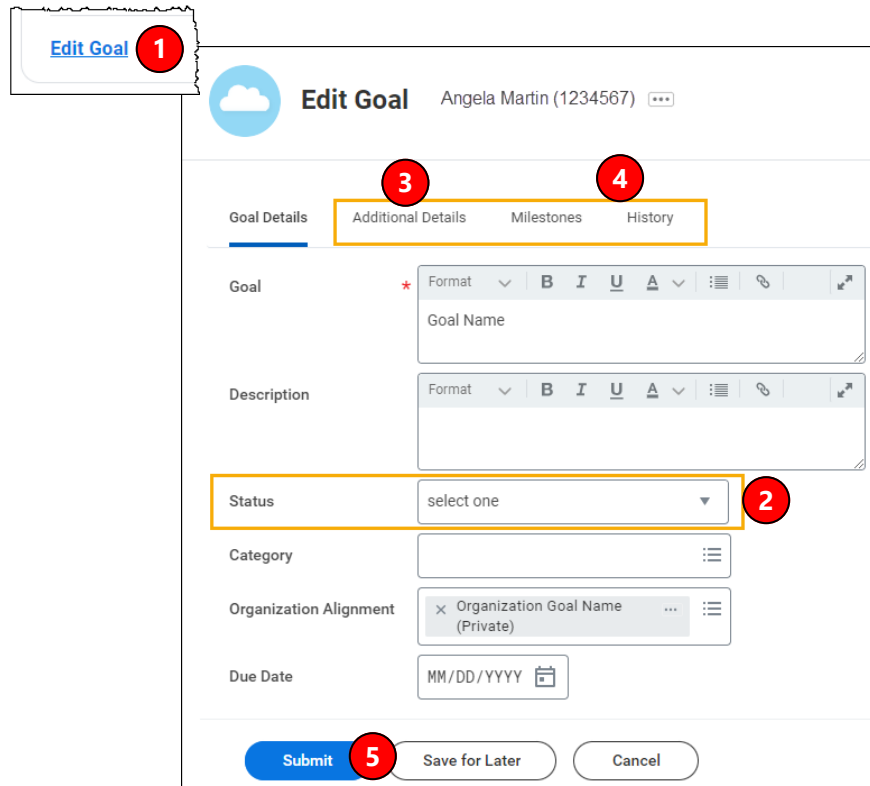**From your Worker Profile:**

1. Select the **Profile** Icon.

2. Choose **View Profile**.

3. On the menu, select **Performance**.

4. **Individual Goals** will automatically appear on this page.

Note: you can select **Create Goal** to create a new goal for yourself. You can also review any **Archived Goals** and **Organization Goals**.

5. The goals will appear as cards. The **Goal Status** is listed above the Goal Name.

6. You can select **Edit Goal** to make changes to the goal.

7. Selecting the **three dots** to the right of the goal will give you the options to **Delete Goal**, **Archive Goal** or **View Goal**.
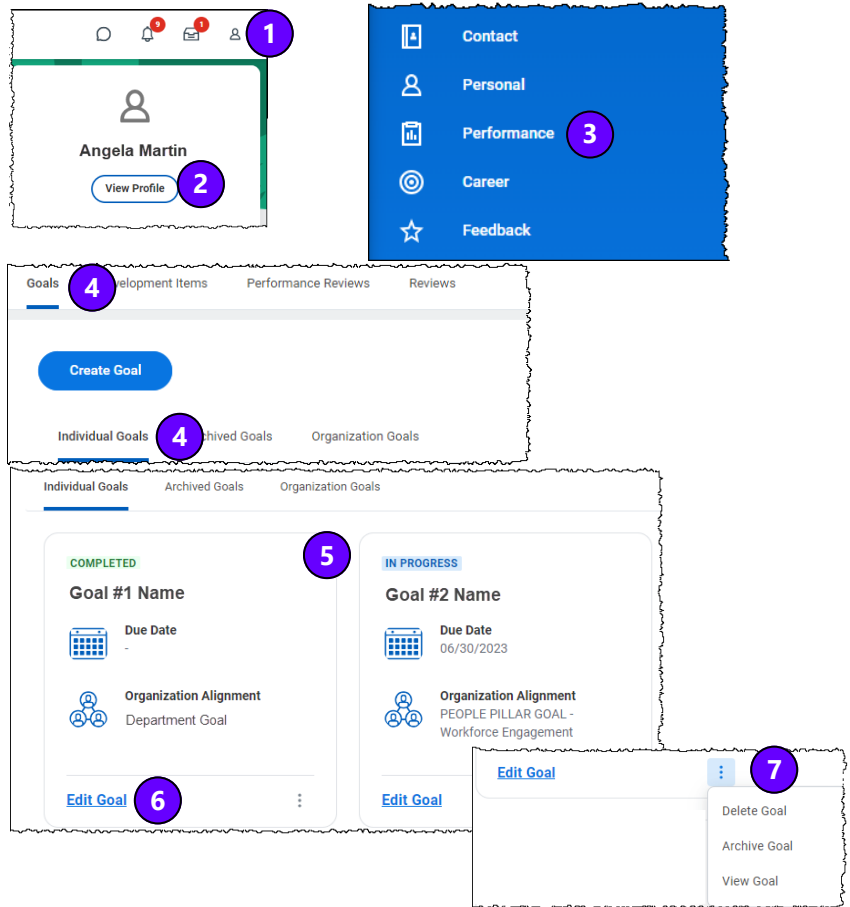
To Edit All Goals—
From your Worker Profile, Performance Page:

1. From the Performance page (see **#6** above), choose a goal you wish to edit and select **Edit Goal**.

2. On this page, you can edit or update the **Status** of the goal.

3. Select **Additional Details** to add a **Weight** to the goal.

4. Select the **Tabs** at the top of the goal form to edit or review **Milestones** and see the goal **History**.

Note: Some Assigned goals may have restricted editing capabilities.

5. Select **Submit** when you have successfully edited the goal.

Goal Setting in Workday—Add New Goals

Workday allows employees to add performance and development goals. Performance goals are part of the annual evaluation and require a due date and weight. Development goals are not. Follow the steps below to add a new goal.

To Add New Goals -
From your Worker Profile:

1. Select the **Profile** Icon.

2. Choose **View Profile**.

3. On the menu, select **Performance**.

4. Select **Create Goal.**

5. 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.

6. Next to **Status**, choose the **status of the goal** (Completed, In Progress, Not Applicable, or Not Started).

7. 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.

8. Use the **Organization Alignment** field to align the 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.

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

10. Select **Additional Details** to determine the **Weight** of the goal. The **total** weight of all goals **combined** should equal **100**.

11. Select **Milestones** to add optional Milestones to the table. Select the **+** Icon to add a new Milestone and insert the **required information**.

12. Select **Submit.**

Note: Required items are marked with a red asterisk.

To Archive Goals—
From your Worker Profile:

1. Select the **Profile** Icon.

2. Choose **View Profile**.

3. On the menu, select **Performance**.

4. Select **Archive or Unarchive Goals.**

5. 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 your manager. 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**.

6. Select **OK**.

From Step 3 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.

QUESTIONS?
Please email BusinessEducation@vumc.org.

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