



Goal Setting in Workday—Manage Assigned Goals and Add New Goals

Workday allows employees to view and interact with goals assigned to them. New goals will send automatic notifications, but employees can access all of their individual goals at any time. Follow the steps to learn how to view, manage, and interact with your assigned goals.

To Find New Goals

From the Home Page:

1. Open your Notifications by selecting the **Notifications icon**.
2. Select the **appropriate notification** that responds to a goal which has been created for you.
3. Select **View Details**.
4. You can view the details of the goal and interact with various links on the page, if available.

The screenshot shows the Workday interface. At the top right, the 'Notifications' icon is circled with a '1'. Below it, a notification for 'Manage Goals: Angela Martin (0123456) - Successfully Completed' is circled with a '2'. A 'View Details' button on the notification is circled with a '3'. Below the notification, the 'View Details' page is shown, with the 'View Goal' section circled with a '4'.

To Find All Goals

From the Search Bar:

1. In the search bar, type **Goals**.
2. Choose **My Goals**.
3. You will be able to view all of your **Individual Goals** from this page as well as **Development Items**, **Organization Goals**, and **Archived Goals**.
4. You also have the ability to download all of your Individual Goals into a PDF by choosing the **PDF** button on the same page.

The screenshot shows the Workday search interface. The search bar contains 'Goals' and is circled with a '1'. Below the search bar, the 'My Goals' option is circled with a '2'. Below that, the 'My Individual Goals' option is circled with a '3'. Below the search results, the 'View Goal' page is shown, with the 'PDF' button circled with a '4'.

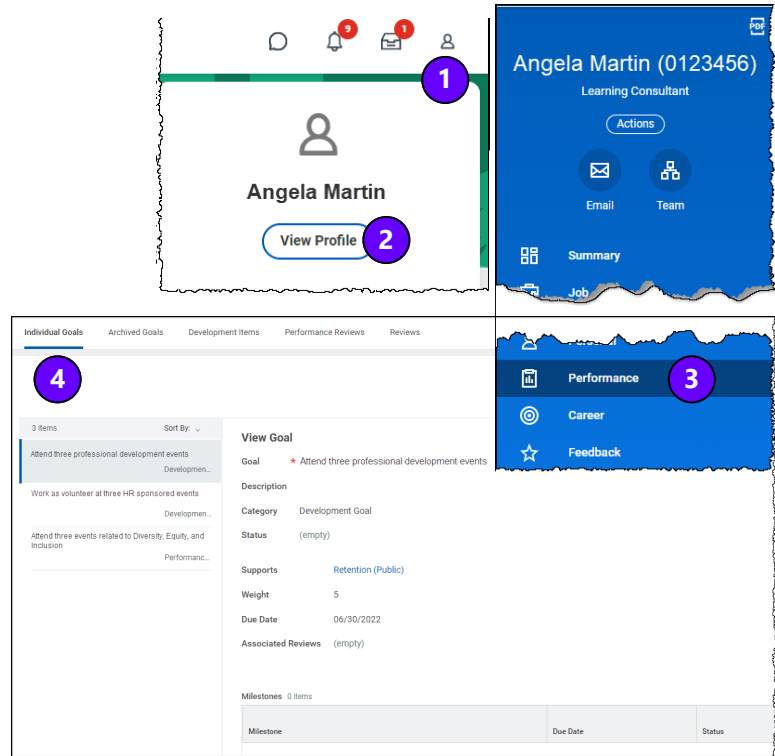


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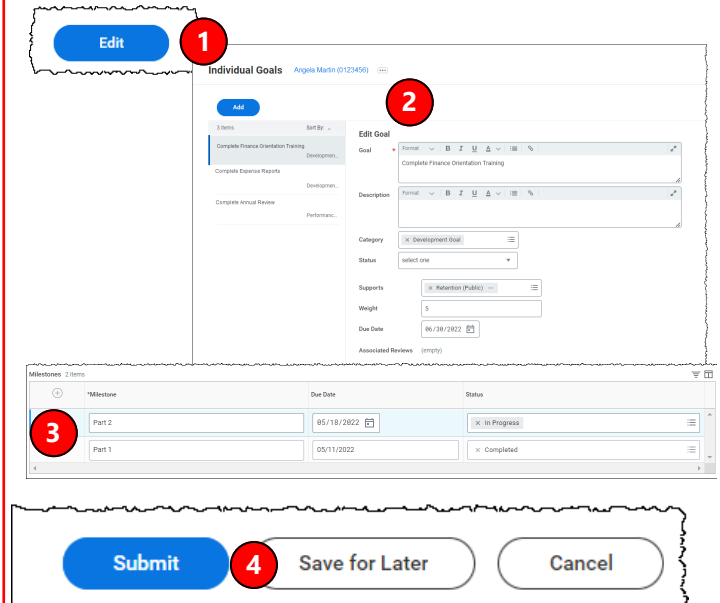
To Find All Goals - From your Worker Profile:

1. Select the **Profile** Icon.
2. Choose **View Profile**.
3. Select **Performance**.
4. On the displayed **Performance** page, you can access all of your goals, both active and archived.



To Edit All Goals— From your Worker Profile, Performance Page:

1. From the Performance page (see #4 above), choose a goal you wish to edit and select **Edit**.
2. On this page, you can choose to edit the existing goal within the system. You can edit the goal itself or update the status of the goal from this page.
3. The system also allows you to track progress via Milestones. You can add Milestones by choosing the + symbol. You must name the **Milestone**, set a **Due Date** and select the **Progress** on the Milestone.
4. Select **Submit** when you have successfully edited the goal.





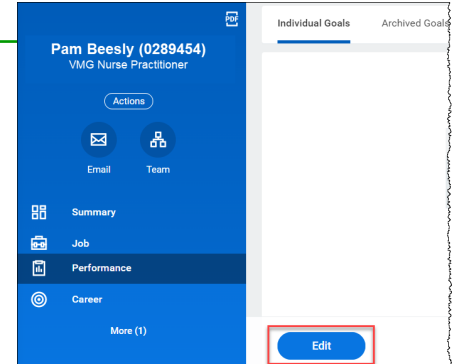
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Workday allows employees to add performance and development goals. Performance goals are part of the annual evaluation and require a due date and weight. Development goals are not. Follow the steps below to add a new goal.

To Add New Goals—

From your Individual Goals, Performance Page

1. From the Individual Goals Edit page (see #1 above), select **Add**.
2. Type the name of the goal as you wish it to appear in the **Goal** field.
3. In the **Description** field, provide additional information about your goal.
4. Choose the **Category** of the goal: **Performance** goal or **Development** goal.



Performance goals are part of your annual evaluation. Development goals are not.

5. Use the **Supports** field to align your goal with an existing Department/Pillar goal (optional).
6. For performance goals, input the **Due Date** and **Weight** of your performance goal. The total weight of all performance goals must be 100.
7. The system allows you to track progress via **Milestones**. You can add Milestones by choosing the + symbol.
You must name the Milestone, set a **Due Date**, and select the **Progress** on the milestone.
8. Select **Submit** to add your goal.

Create Goal

1. Add

2. Goal: Increase Patient Experience metric for my department by 5% this fiscal year.

3. Description: Sometimes our patients have responded on surveys that it feels like time with their provider is limited in our department. I can contribute directly to this experience metric by being intentional with my patients and making sure their voice is heard.

4. Category: Performance Goal

5. Supports: 2c) Service Pillar - Patient Experience (Public)

6. Weight: 100

7. Due Date: 06/30/2023

8. Submit

Milestone	Due Date	Status
Obtain reach goal of 85% for this metric by the end of the third quart	02/28/2023	Completed

QUESTIONS?