



# Workday Workshop:

Goal Setting  
For Managers and Employees

Duration: 30 minutes

# Access Workday through the VUMC Network or VPN

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To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)

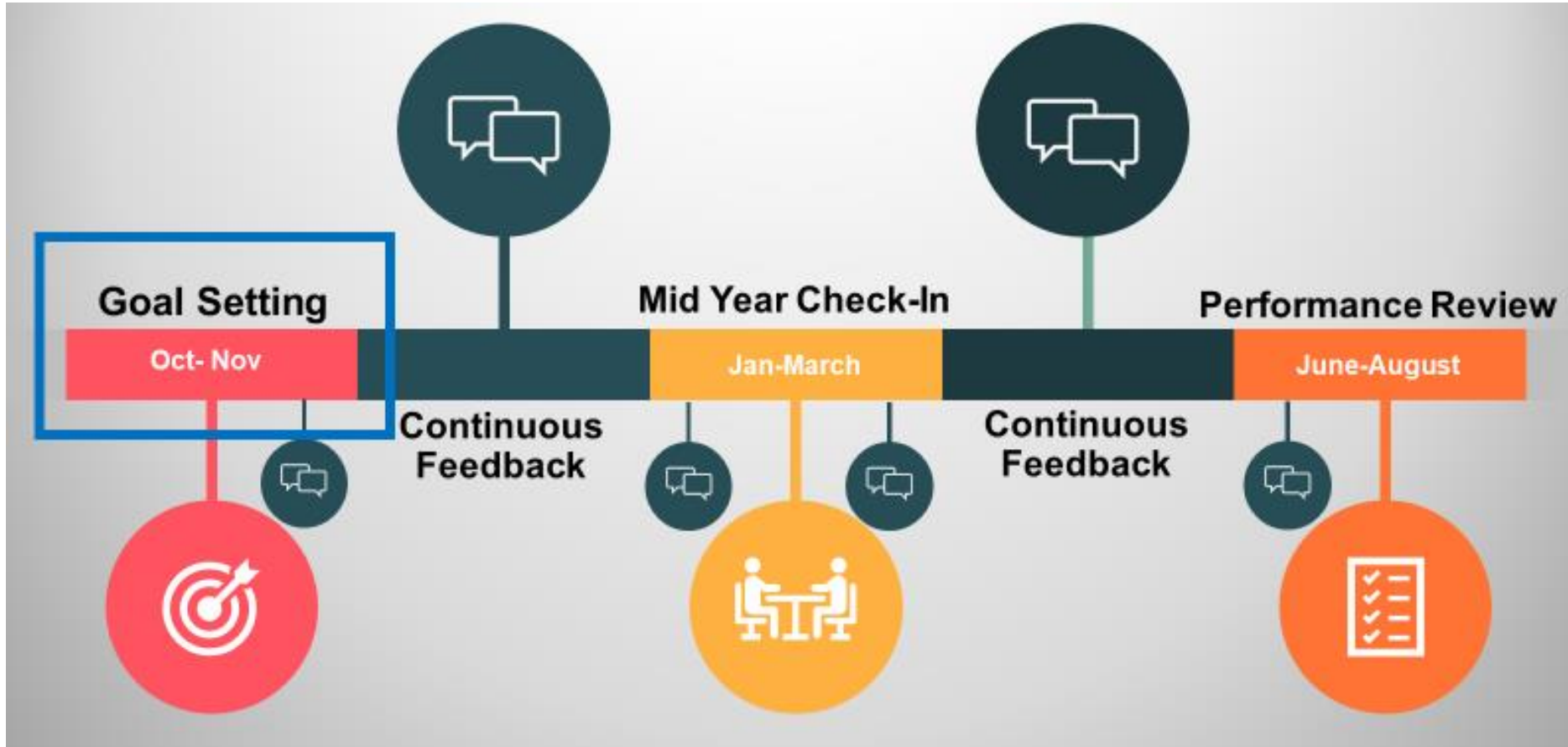


# Workshop Agenda

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- Review the Evaluation Timeline
- **Managers**
  - Responsibilities
  - Set Goals on Behalf of Employees
  - Review and Archive Goals
- **Employees**
  - Responsibilities
  - Manage Assigned Goals
  - Add, Review, Edit, and Archive Goals

# Sample Evaluation Process Timeline



Note: This timeline is subject to change annually.

**Manager**

# Manager Responsibilities

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As a leader, you are responsible for:

1. Identifying the best way that employee(s) can contribute to VUMC.
2. Setting goals for the supervisory organization (i.e., Department), team, and/or employee.
3. Sharing relevant goal information with employee(s) in existing forums: 1:1 or team meetings, huddles, rounding opportunities, etc.
  - What are the goals?
  - How do the goal(s) contribute to VUMC's overall mission?
  - What does success in completing the goal(s) look like?
4. Discussing Expectations:
  - Who is responsible for entering goals, setting appropriate goal weight in WD, and archiving goals from the past fiscal year (leader or employee(s))?
5. Tie goals to enterprise goals.



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Editable



# Editable vs. Non-Editable Goals

## Edit Goal

Goal \*

Description

Category

Status

Supports

Weight

Due Date

Associated Reviews (empty)

Milestones 0 items

+	*Milestone	Due Date
No Data		

## Editable Goals

Keeping the Editable box selected allows you and your employee to edit the goal after it has been assigned. You may want to edit for any of the following reasons:

- Change in business environment.
- Change in responsibilities.
- Update the weight.
- Change the goal category.



# Editable vs. Non-Editable Goals

**Edit Goal**

Goal \* Non-Editable Goal

Description

Category Performance Goal

Status

Supports PEOPLE PILLAR GOAL - Employee Engagement (Public)

Weight 50

Due Date 06/30/2024

Associated Reviews (empty)

Milestones 0 items

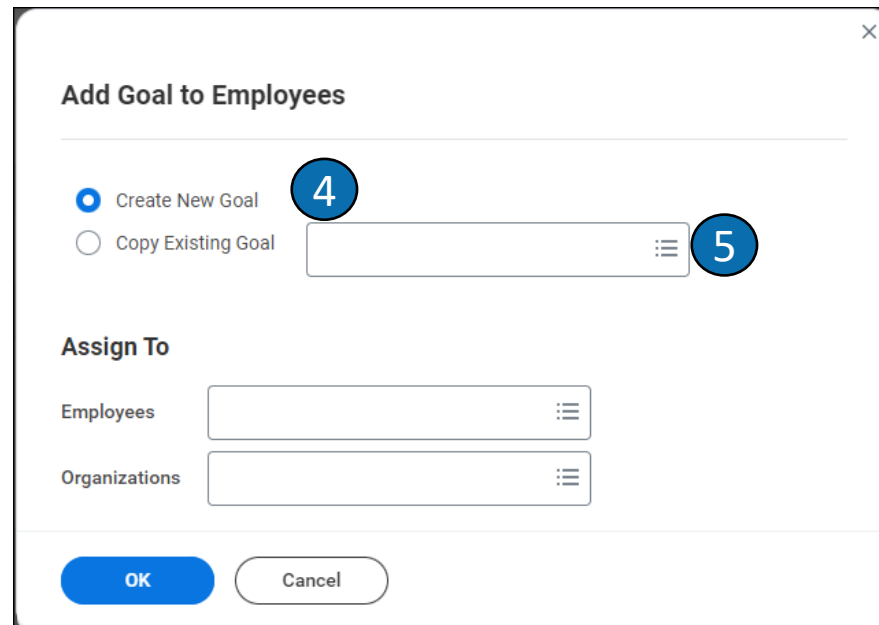
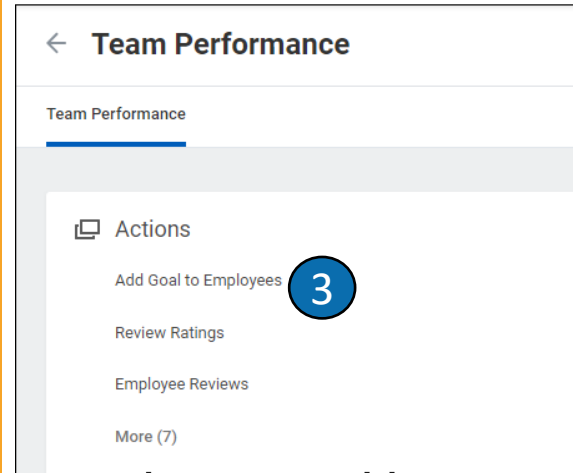
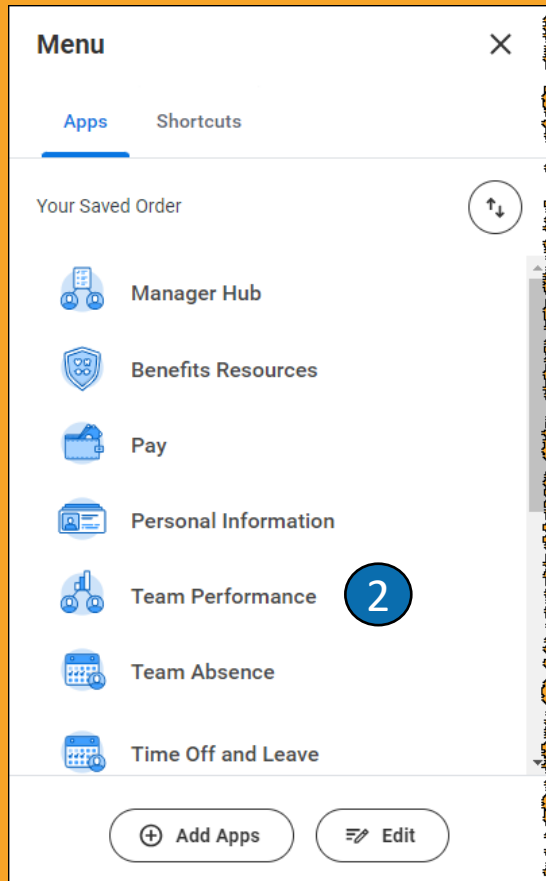
+	*Milestone	Due Date

## Non-Editable Goals

Deselecting the box next to editable will make the goals appear like this image in the system. Some problems that may arise are:

- You can only update the Status and Milestones in the goal.
- To remove or change the goal, you can only Archive the goal, causing you to start over on another goal.

# Set Goals on Behalf of Employees



- To Set Goals on Behalf of Employees:
1. Select **Menu**.
  2. Select **Team Performance**.
  3. Select **Add Goals to Employees**.
  4. Follow the steps on **Slide 9** to **Create a New Goal**.
  5. Follow the steps on **Slide 10** to **Copy an Existing Goal**.

# Create New Goal

**Add Goal to Employees**

Create New Goal **1**

Copy Existing Goal

**Assign To**

Employees: Holly Wood (1234567), Sandy Beech (0123456), Dinah Mite (0012345) **2**

Organizations:

**OK** **3** Cancel

**Goal** \* Normal **B I U A** Develop and implement a system-wide survey focusing on XYZ **4**

**Description** Normal **B I U A**

Goal success will be measured by:

1. Timely development of survey (needs to be completed by x date).
2. Timely implementation of the survey (needs to be implemented by y date).
3. Quality of survey (i.e., no spelling or grammar errors).
4. Increase of survey takers from # to #.

**Category** Performance Goal **5**

**Supports** PEOPLE PILLAR GOAL - Employee Engagement (Public) **6**

**Weight** 25 **7**

**Due Date** 03/31/2023 **8**

**Editable**  **9**

**Submit** Save for Later Cancel

Remove Add

1. Ensure that **Create New Goal** is selected.
  2. Select individual or multiple **employee(s)** or assign the goal to an **Organization**.
  3. Select **OK**.
  4. Enter the **Goal Title** and optional **Description**.
  5. Select the appropriate **Category**, Performance or Development. Definitions given on **Slide 12**.
  6. Next to Supports, select which **Pillar Goal** this supports. Use steps from **Slide 11** for more instructions.
  7. Enter the **Weight** of the goal. The total weight of all goals should equal 100.
  8. Select the **Due Date** of the goal.
  9. Ensure that the **Editable** box remains checked. If unchecked, the manager and employee will not be able to edit.
  10. Select **Submit**.
- Note:** You can add multiple goals using the **Add** button. Use the **Remove** button to delete a goal.

# Copy Existing Goal

**Add Goal to Employees**

Create New Goal  
 Copy Existing Goal

1. PEOPLE PILLAR GOAL - Employee Engagement (Public)

Assign To

Employees

2. VUMC Department (Artie Chokie) (1234567) (S98765AA)

Organizations

Include Subordinate Organizations

3. OK

Goal

Format  PEOPLE PILLAR GOAL - Employee Engagement

Description

Format  We nurture a caring, culturally sensitive, and professional atmosphere as we continuously invest in the well-being and aspirations of our people.

Category

4. Performance Goal

Supports

5. PEOPLE PILLAR GOAL - Employee Engagement (Public)

Weight

25

6. 06/30/2024

Due Date

7. Editable

Remove

Add

8. Submit Save for Later Cancel

1. Select **Copy Existing Goal** and use the steps on **Slide 11** to choose a **Pillar Goal**.
2. Select individual or multiple **employee(s)** or assign the goal to an **Organization**.
3. Select **OK**.

**Note:** The **Goal Title**, **Description**, and **Supports** will auto-populate based on your selection in **step 1**. They can be edited if needed.


4. Select the appropriate **Category**, Performance or Development. Definitions given on **Slide 12**.
5. Enter the **Weight** of the goal. The total weight of all goals should equal 100.
6. Select the **Due Date** of the goal.
7. Ensure that the **Editable** box remains checked. If unchecked, the manager and employee will not be able to edit.
8. Select **Submit**.


**Note:** You can add multiple goals using the **Add** button. Use the **Remove** button to delete a goal.


# Selecting a Pillar Goal

Copy Existing Goal   1


Supports   1


Search 

- My Goals >
- My Organizations' Individual Goals >
- My Organization Goals  2 >
- Assigned Goals >
- Goals by Category >


Search 


← My Organization Goals


- Office of the CEO Department (Jeffrey Balser (0024032)) (S108004AA)  3 >

Search 

← Office of the CEO Department (Jeffrey Balser (0024032)) (S108004AA)

- FY2023 Pillar Goals >
- FY2024 Pillar Goals  4 >

Search 

← FY2024 Pillar Goals  5

- GROWTH & FINANCE PILLAR GOAL - CMI Adjusted Resource LOS (Public)
- GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand (Public)
- GROWTH & FINANCE PILLAR GOAL - Key Outpatient Procedures Volumes (Public)
- GROWTH & FINANCE PILLAR GOAL - Net Operating Margin (Public)
- GROWTH & FINANCE PILLAR GOAL - Surgical Inpatient Volumes (Public)
- INNOVATION PILLAR GOAL - Academic Performance (Public)
- INNOVATION PILLAR GOAL - Value Based Care (Public)
- PEOPLE PILLAR GOAL -

To select a **Pillar Goal** (Workday refers to these as **Organization Goals**), follow these steps:

1. Next to **Copy Existing Goal** or **Supports** (located in the goal form), select the prompt button.
2. Select **My Organization Goals**.
3. Select **Office of the CEO Department**.
4. Select **FY2024 Pillar Goals**.
5. A list of the Pillar Goals will appear. Select the appropriate **Pillar Goal**.

# Goal Categories

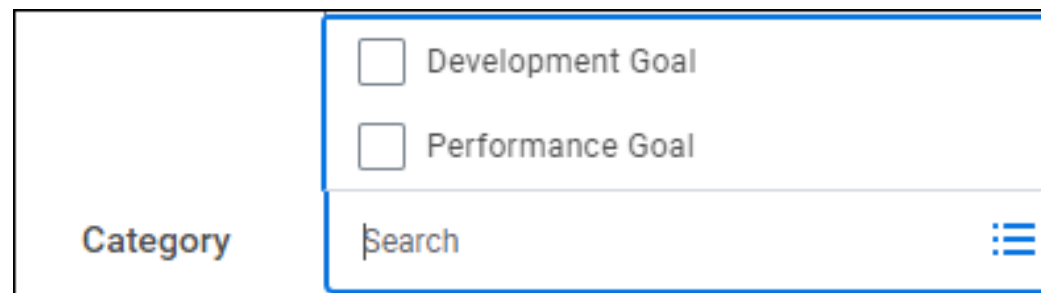
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## Performance Goals

- Linked to an employee position's key responsibilities
- Align with VUMC Pillar Goals and Department Goals

## Development Goals

- Focus on building new skills, knowledge, and abilities to improve current job performance
- Prepare for future career opportunities



A screenshot of a dropdown menu for selecting goal categories. The menu is open, showing two options: "Development Goal" and "Performance Goal", each with an unchecked checkbox. Below the options is a search bar with the text "Search" and a blue menu icon (three horizontal lines) on the right. The word "Category" is visible in the background of the dropdown.

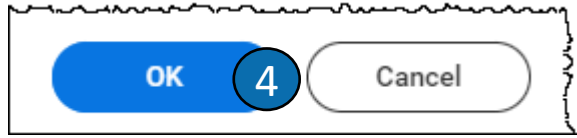
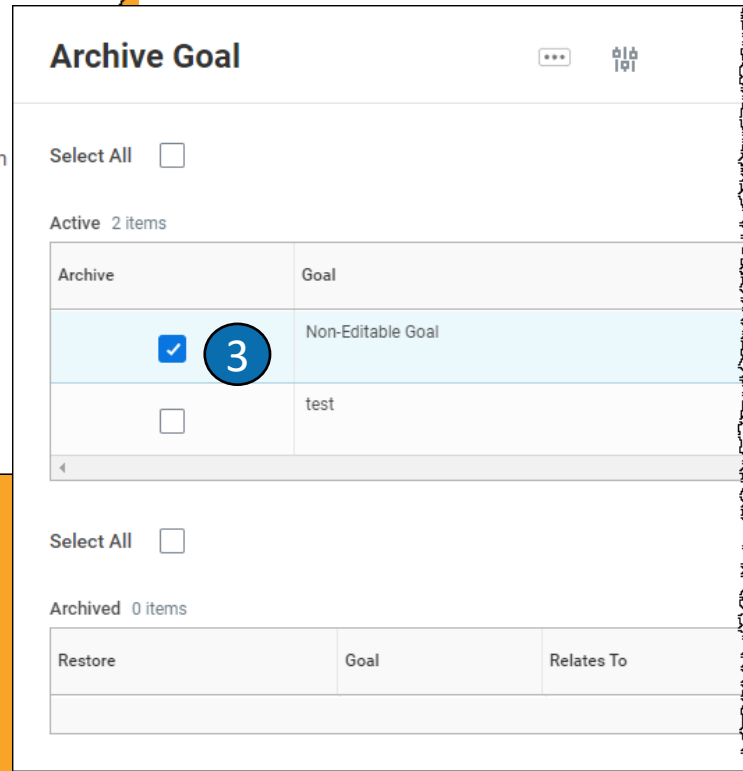
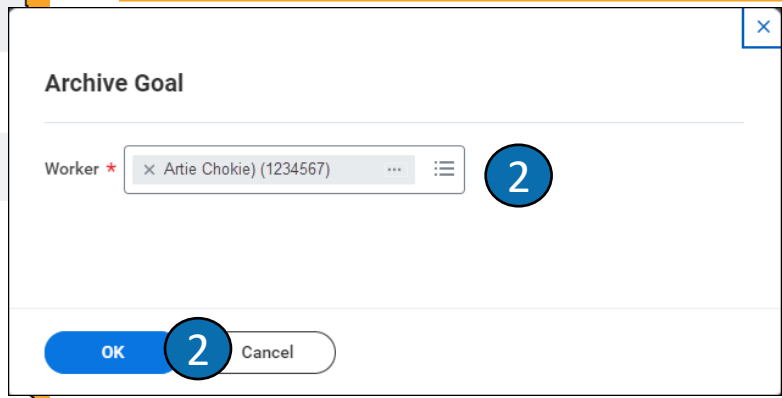
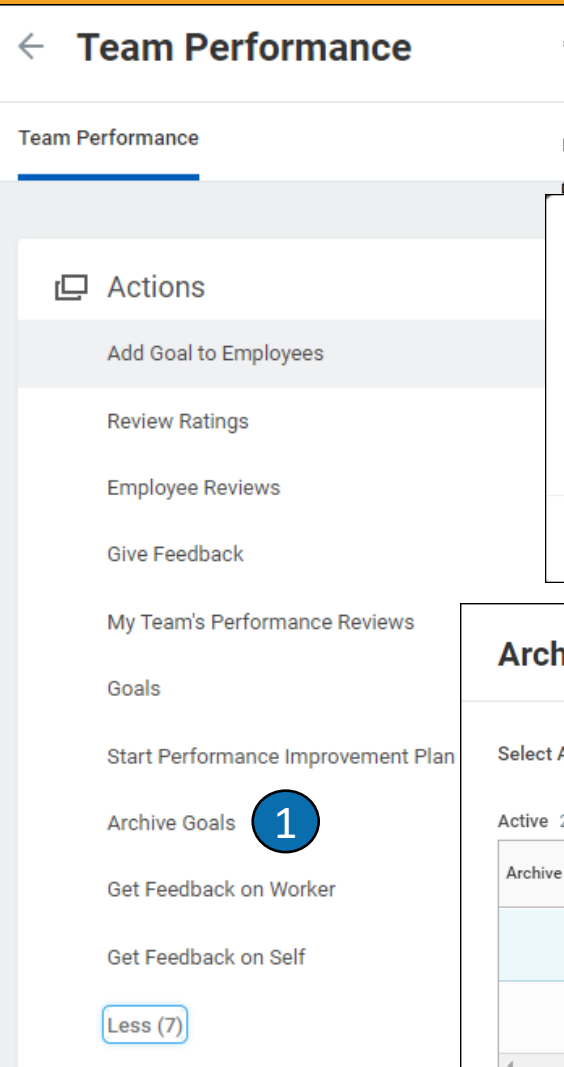
**Note:** Only Performance Goals should be weighted.

# Archive a Non-Editable Goal

Follow the steps to archive a goal if the Editable box was unchecked:

1. From the Team Performance App, select **More(7)**, and then **Archive Goals**.
2. Select the appropriate **worker**, then select **OK**.
3. Next to the goal you wish to archive, select the check box.
4. Select OK.

The goal is now archived and will not appear.



# Archive Goals

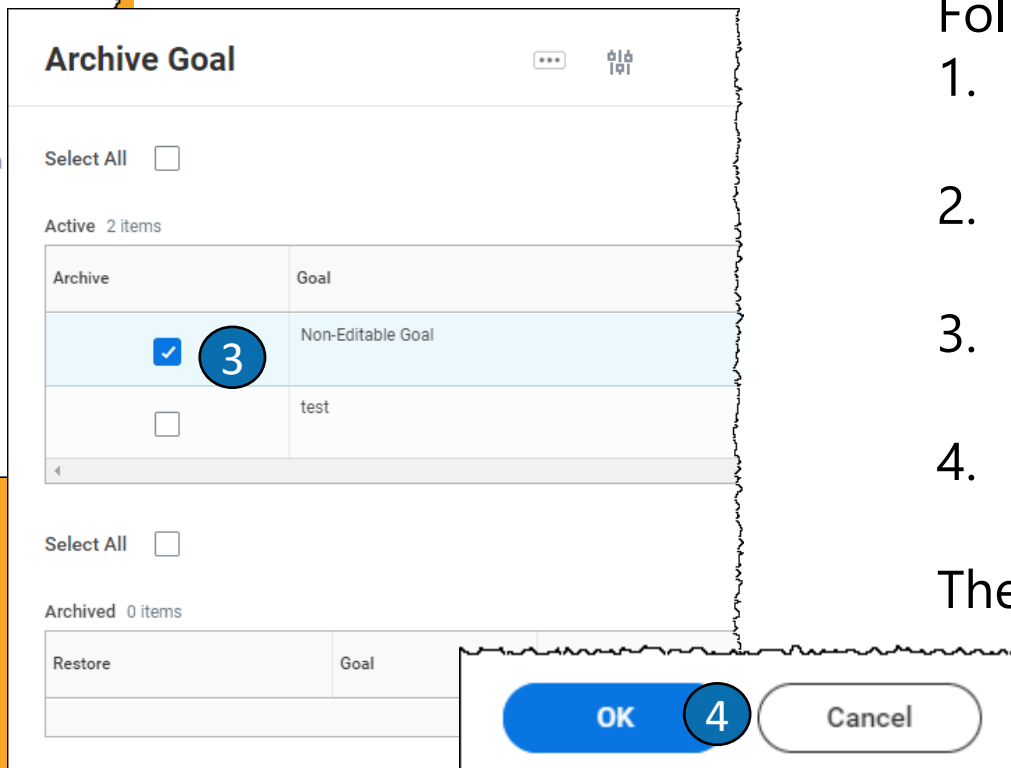
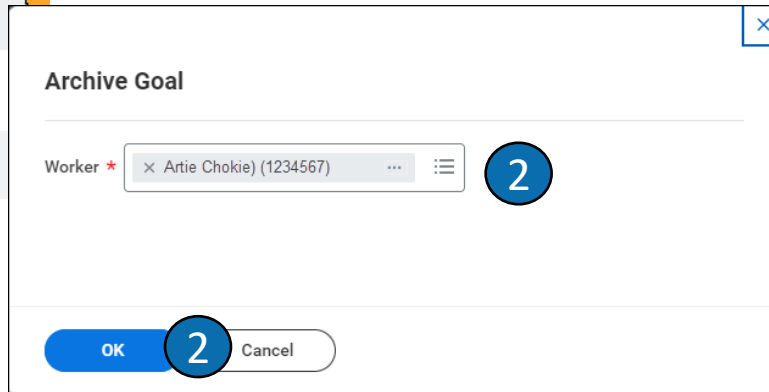
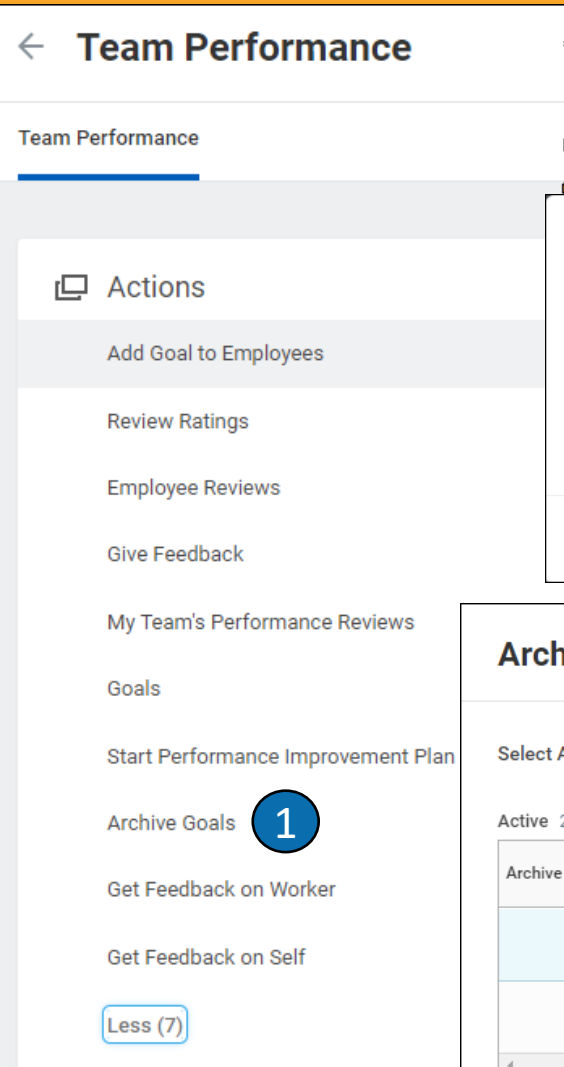
You may need to archive a goal when:

- A goal is non editable and has an error
- A new goal setting period has started, and your goals are from the previous evaluation cycle.

Follow the steps to archive a goal

1. From the Team Performance App, select **More(7)**, and then **Archive Goals**.
2. Select the appropriate **worker**, then select **OK**.
3. Next to the goal you wish to archive, select the check box.
4. Select OK.

The goal is now archived and will not appear.





Employee

# Employee Responsibilities

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As an employee, you are responsible for:

1. Checking in with your manager during existing forums (e.g., 1:1 meetings or team meetings, huddles, rounding) on who is responsible for entering goals into Workday and archiving goals from the previous fiscal year.
2. If applicable, entering goals into Workday.
3. Archiving goals from the previous fiscal year or if asked, noneditable goals.
4. Confirming that the weight of all goals add up to 100. If a goal is not editable and impacts the overall total goal weight, reach out to your leader about the situation.
5. Discussing with your manager any edits made to your assigned goals (e.g., goal title, description, weight).
6. Asking questions to make sure you have the information needed to accomplish your individual goal(s).
7. Meeting the goal expectation(s) set out for you.

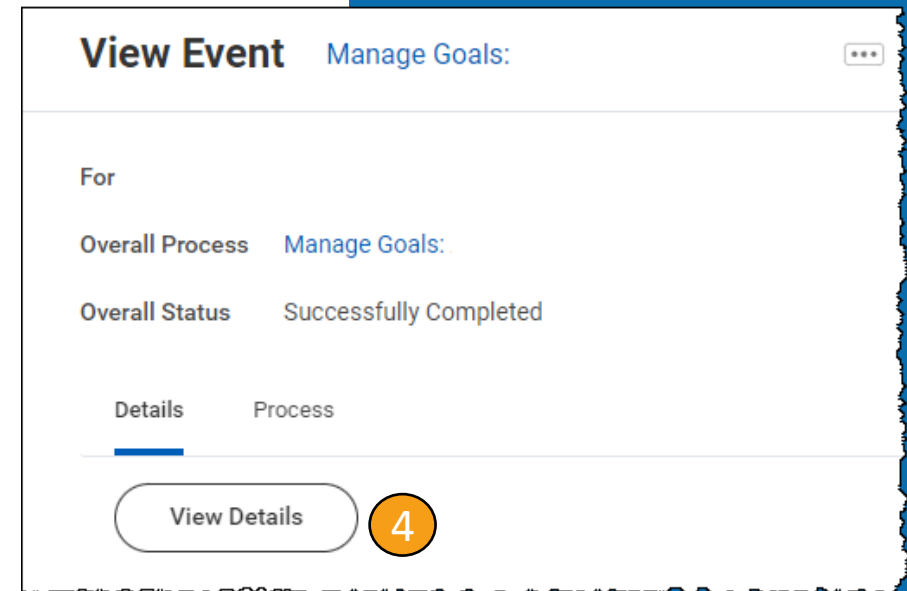
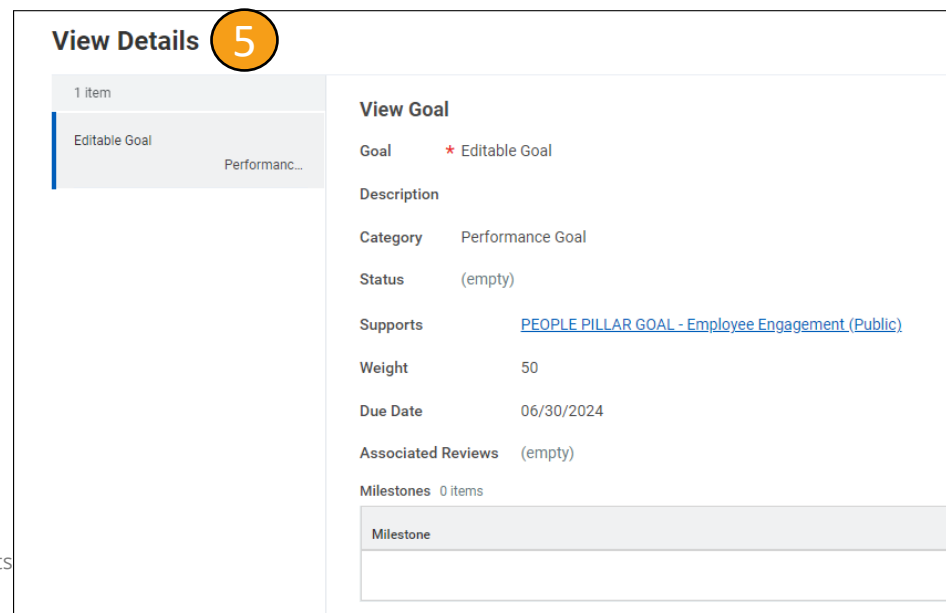
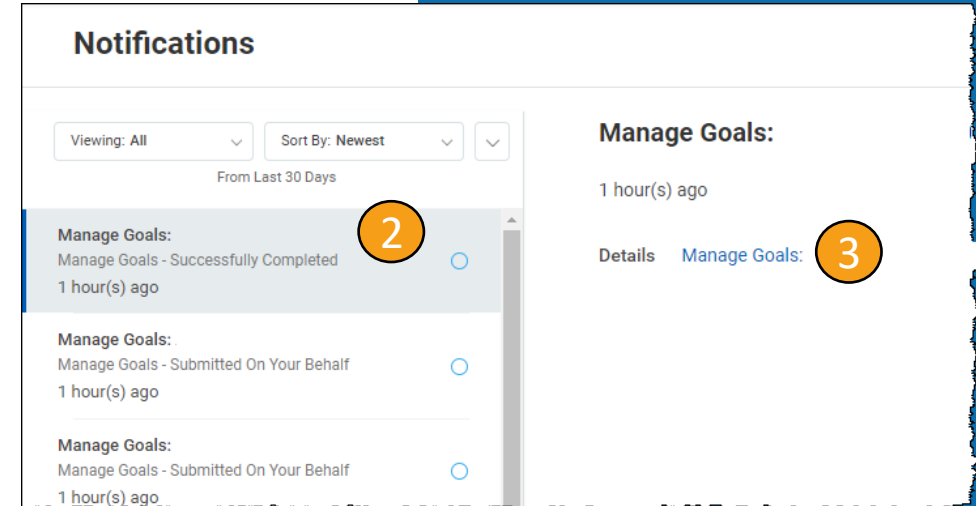


DEMO

# Manage Assigned Goals

When a manager assigns a goal, the employee will receive a notification.

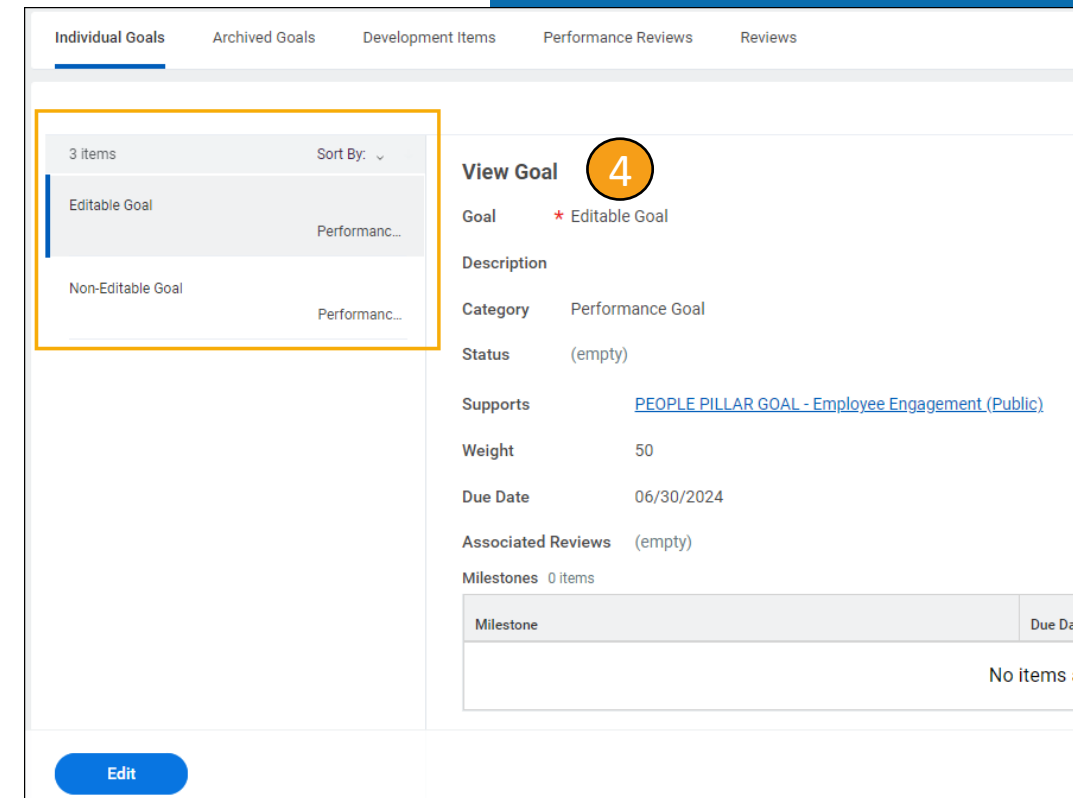
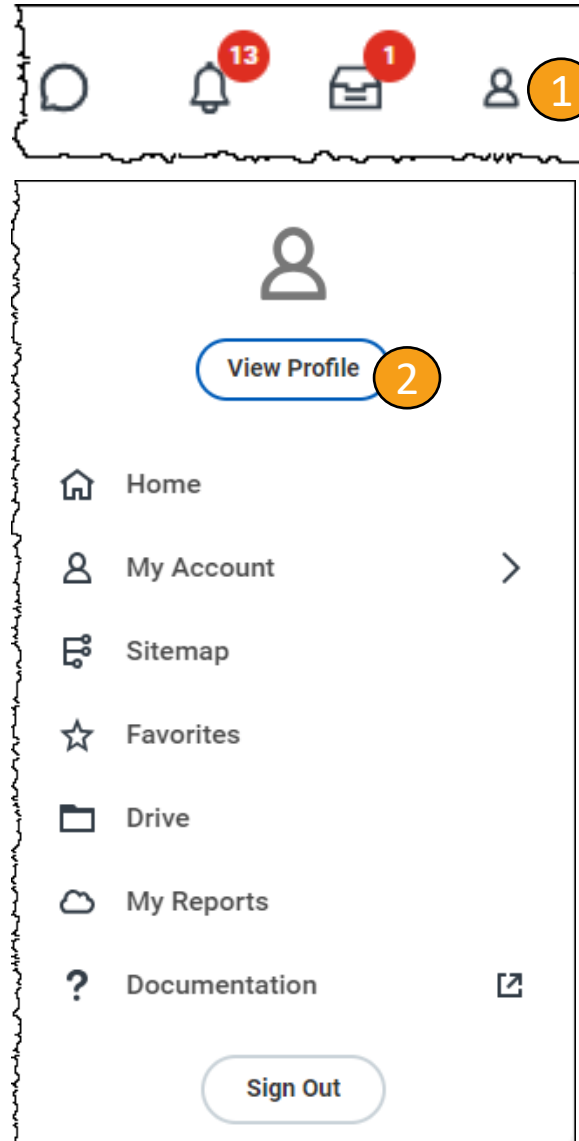
1. Select the **Notifications** icon.
2. Select the **Manage Goals Notification**.
3. Select the link next to **Details**.
4. Select **View Details**.
5. An overview of the goal will be visible. Alternate ways to view goals are on the following slides.



# Review All Goals

You can review your assigned or created goals from your Workday profile.

1. Select the **Profile** icon.
2. Select **View Profile**.
3. Select **Performance**.
4. All of your goals will be listed on the left. Selecting a goal will show you the details of that goal.



# Edit Existing Goal

1. From the **View Goals** page, select **Edit**.
2. You can edit any of the fields on the page. Employees can update the **Status** of their goal and can also add **Milestones**.
3. When you are done editing a goal, select **Submit**.



**Individual Goals**

**Add**

3 items    Sort By: ▾

Editable Goal	Performanc...
Non-Editable Goal	Performanc...

**Edit Goal**

**Goal** \*    Format ▾    **B**    *I*    U    A ▾    ☰    🔗

Editable Goal

**Description**    Format ▾    **B**    *I*    U    A ▾    ☰    🔗

**Category**    × Performance Goal    ☰

**Status**    select one ▾    2

**Supports**    × PEOPLE PILLAR GOAL - Employee Engagement (Public)    ...    ☰

**Weight**    50

**Due Date**    06/30/2024 📅

**Associated Reviews** (empty)

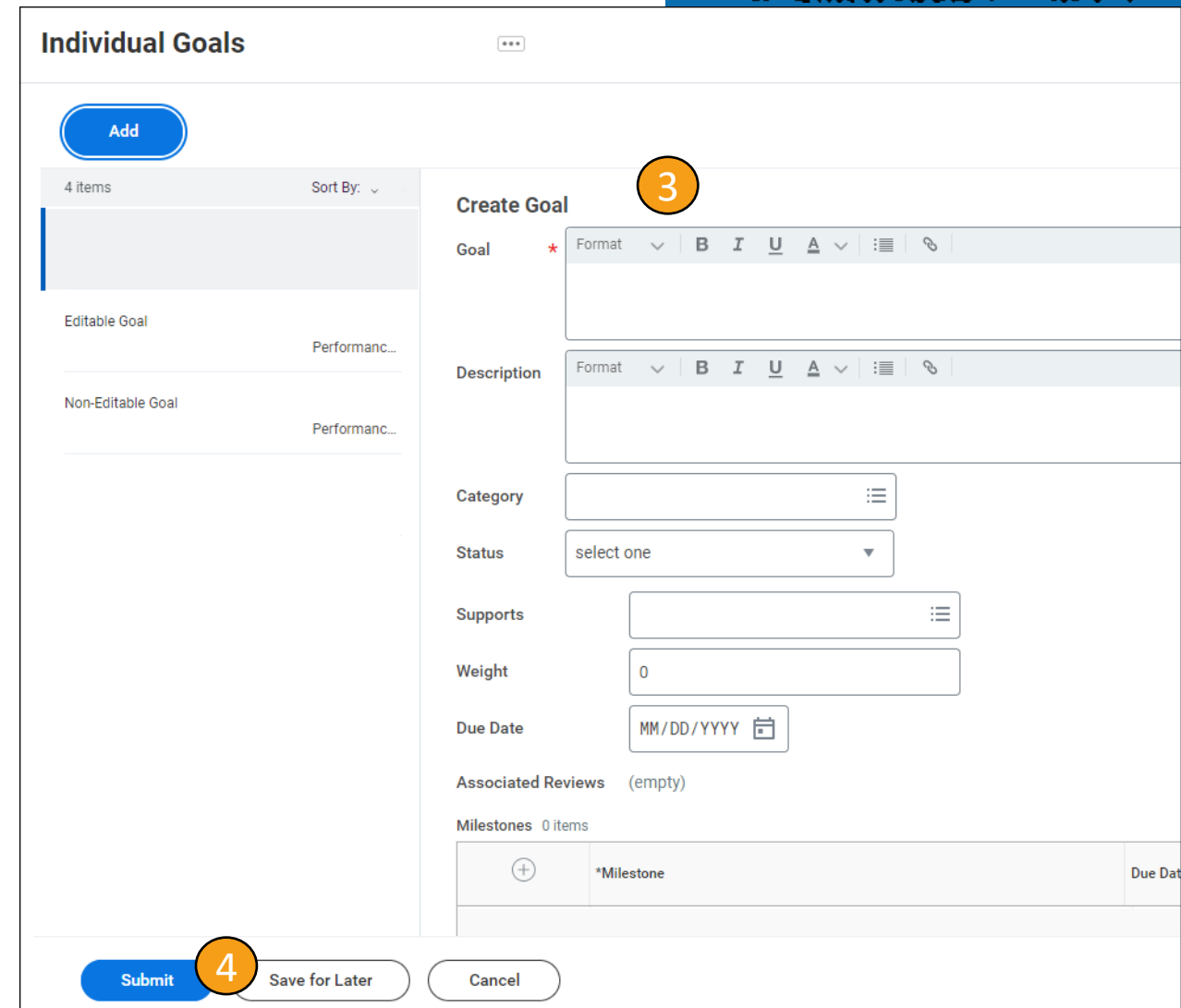
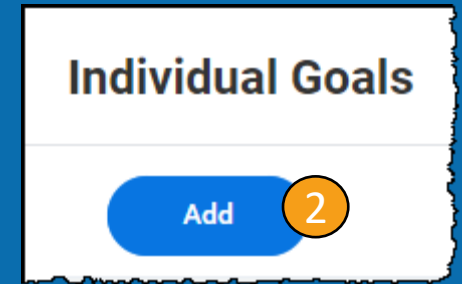
**Milestones** 0 items

+ 2 Milestone	Due Date
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**Submit** 3    Save for Later    Cancel

# Add New Goal

1. From the **View Goals** page, select **Edit**.
2. Under Individual Goals, select **Add**.
3. Insert a **Goal name**, **Description**, **Category** (Slide 12), **Status**, **Supports** (Slide 11), **Weight** (Total goal weight should not exceed 100), **Due Date**, and any **Milestones**.
4. When you are done adding a goal, select **Submit**.



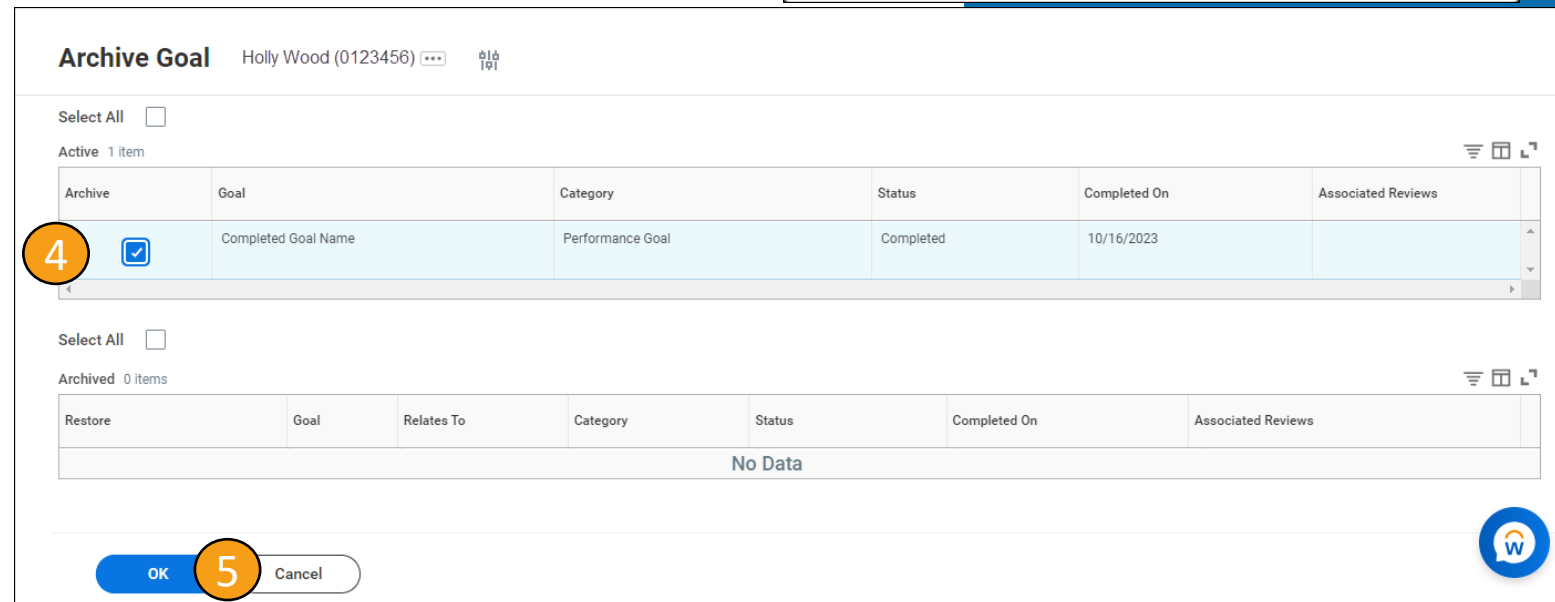
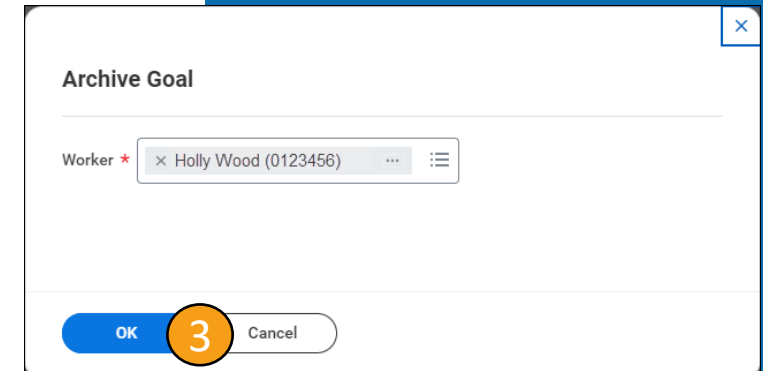
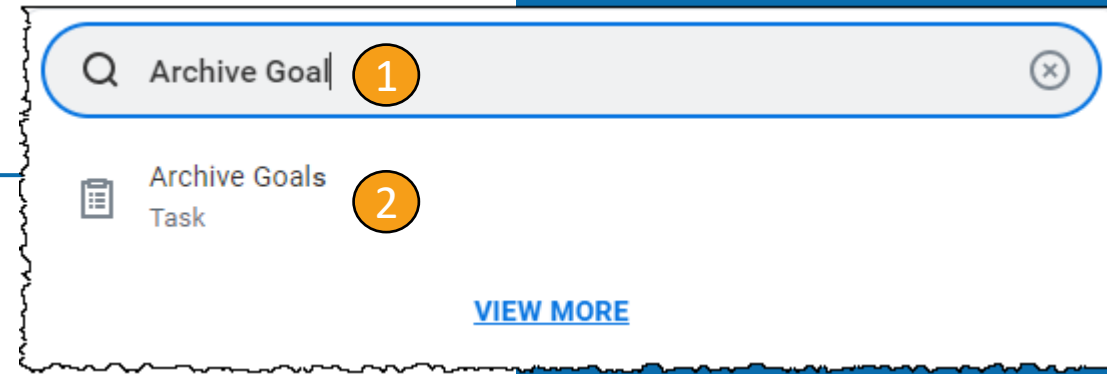
The screenshot shows the "Individual Goals" interface. At the top left, there is a blue "Add" button. Below it is a list of goals, with the first one being an "Editable Goal" and the second a "Non-Editable Goal". On the right side, the "Create Goal" form is visible. It includes a "Goal" field with a red asterisk, a "Description" field, a "Category" dropdown, a "Status" dropdown (currently set to "select one"), a "Supports" dropdown, a "Weight" input field (set to "0"), and a "Due Date" field (set to "MM/DD/YYYY"). At the bottom of the form, there are "Associated Reviews" (empty) and "Milestones" (0 items). At the very bottom of the page, there are three buttons: "Submit" (with a circled 4), "Save for Later", and "Cancel".

# Archive Goal (Employee)

When a new goal period starts, the previous FY's goals will need to be archived.

1. Type **Archive Goals** to the search bar.
2. Select the **Archive Goals Task**.
3. Under **Archive Goal**, ensure that the listed worker is yourself. Select **OK**.
4. Select the **check box** to the left of the goal you wish to archive.
5. Select **OK**.

**Note:** You can restore any archived goals by using the field below.





Conclusion

# Key Takeaways

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## Managers

- Identify the best way that team members can contribute to VUMC's overall mission.
- Share with team whether goals will be assigned or team members are expected to enter their goals.
- Set expectations.
- If entering goals, align performance goal(s) to Pillar Goals.
- Ensure that the Editable box remains checked so that the managers and employees can make changes to the goal, if needed.

## Employees

- Confirm with your leader whether you are expected to enter goals.
- Confirm that the weight of all goals adds up to 100.
- If entering goals, align performance goal(s) to Pillar Goals.
- Discuss with your leader any edits you have made to assigned goals.
- Archive goals from the previous fiscal year if they are no longer relevant.

# Resources

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[WDHR\\_801\\_Setting Goals in Workday \(Employees\)](#)

[WDHR\\_802\\_Setting Goals in Workday \(Managers\)](#)

[QRG\\_Manage Assigned Goals and Add New Goals](#)

[QRG\\_Setting Goals on Behalf of Employees](#)

[Setting SMART Goals](#)

If you need information about your entity goals, please reach out to your chain of command.



Questions?