



Workday Workshop:

Goal Setting
For Managers and Employees

Duration: 30 minutes

Access Workday through the VUMC Network or VPN

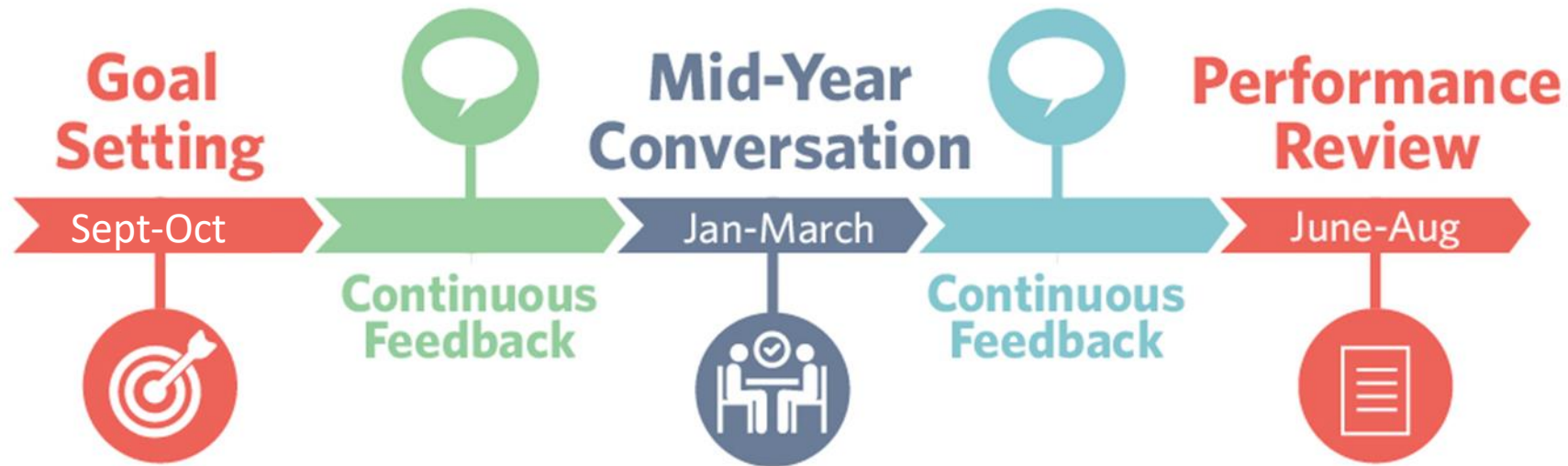
To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)



Workshop Agenda

- Review the Evaluation Timeline
- Archiving Goals
- **Managers**
 - Responsibilities
 - Set Goals on Behalf of Employees
- **Employees**
 - Responsibilities
 - Manage Assigned Goals

Sample Evaluation Process Timeline



Note: This timeline is subject to change annually.

Archiving Goals

Archiving Goals FAQ

Who should archive goals?

Managers and Employees can archive goals after the Annual Performance Evaluation is completed

When should we archive goals?

Before you set new goals the prior year goals should be archived. If goals are not archived, it can create issues with evaluations and goal weights.

Where can we find archived goals?

On the Goals page on your profile, you will see a tab labeled Archived Goals. All previously archived goals will be listed here for reference.



Archive Goals (Manager)

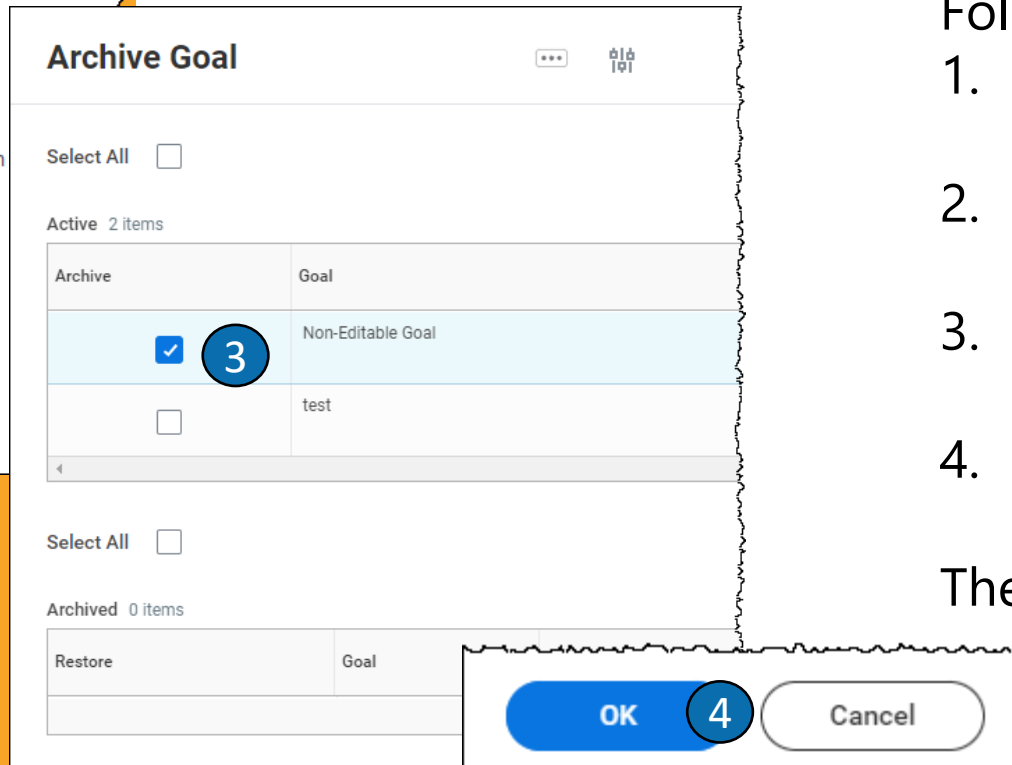
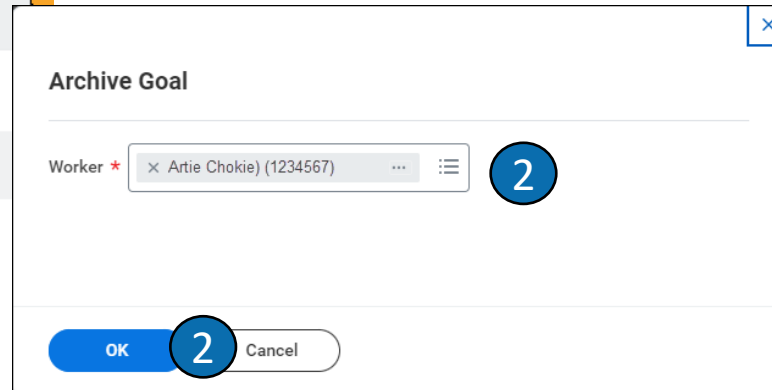
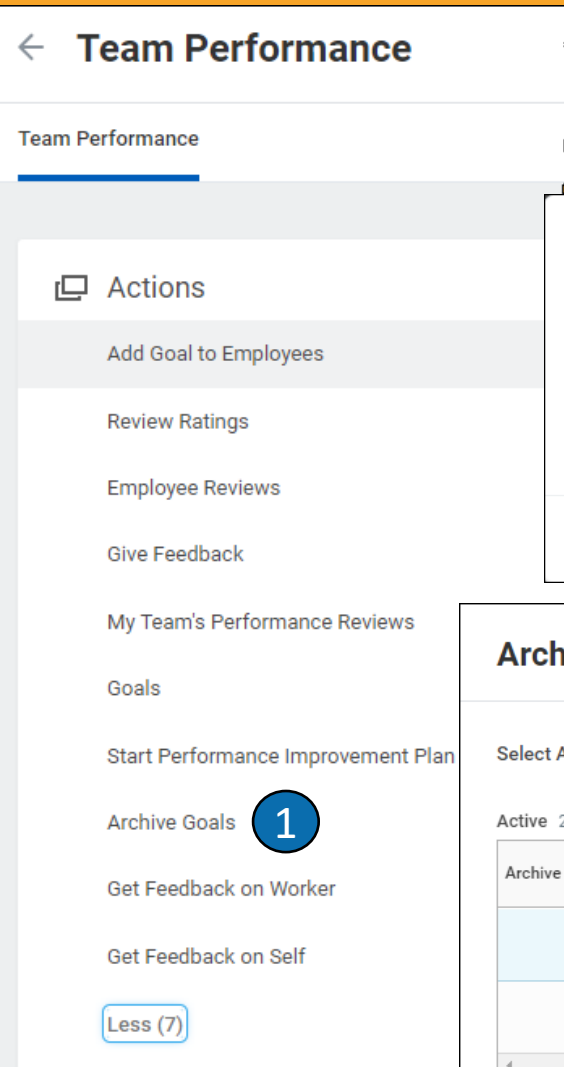
You may need to archive a goal when:

- 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.

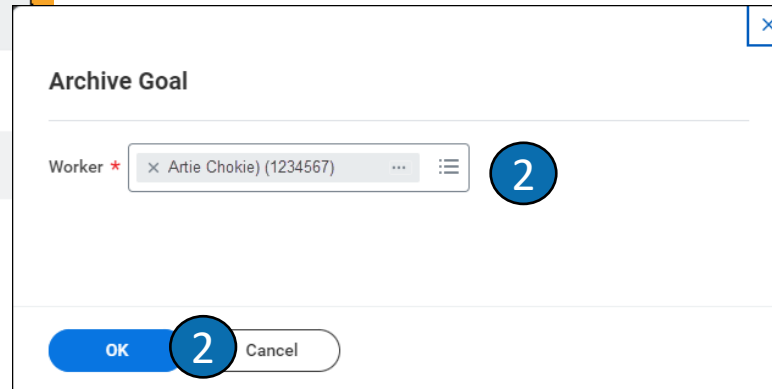


Archive a Non-Editable Goal

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.

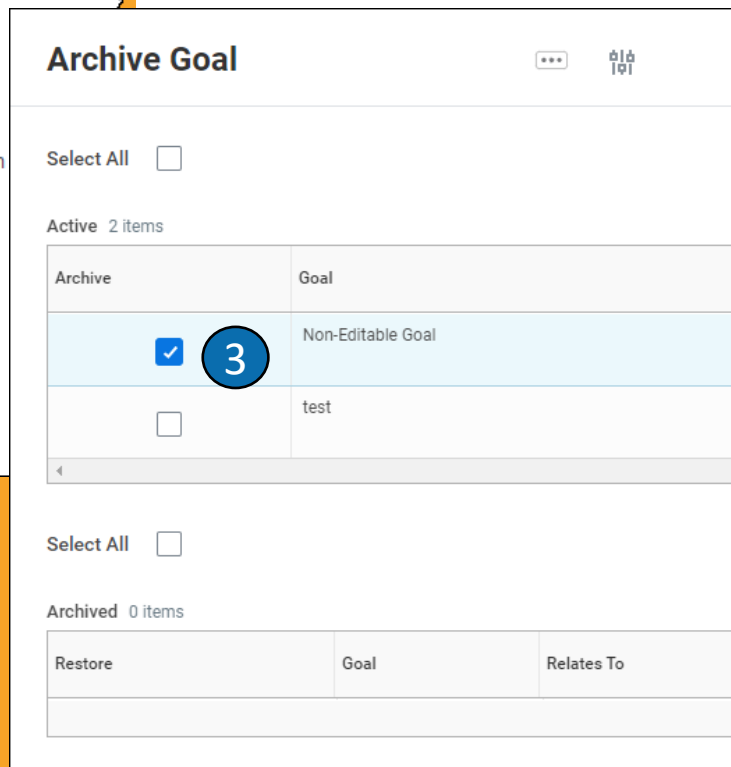
The goal is now archived and will not appear.



Archive Goal

Worker * **2**

OK **2** Cancel



Archive Goal

Select All ☐

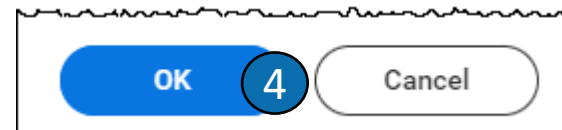
Active 2 items

Archive	Goal
<input checked="" type="checkbox"/> 3	Non-Editable Goal
<input type="checkbox"/>	test

Select All ☐

Archived 0 items

Restore	Goal	Relates To
---------	------	------------



OK **4** Cancel

Archive Goal (Employee)

1. On your employee profile, select **Performance** from the menu.
2. On the Goals tab, select **Archive or Unarchive Goals**.
3. Select the **check box** to the left of the goal you wish to archive. You can also choose **Select All** if you want to archive all listed goals.
4. Select **OK**.

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



The screenshot illustrates the process of archiving a goal in the myworkday system. It is divided into five numbered sections:

- Section 1:** A menu on the left side of the employee profile with the 'Performance' option highlighted.
- Section 2:** The 'Goals' tab in the top navigation bar, with the 'Archive or Unarchive Goals' button highlighted.
- Section 3:** The 'Archive or Unarchive Goals' modal window. It shows a table of active goals with checkboxes for selection. The 'Select All' checkbox is also visible.
- Section 4:** The 'OK' button at the bottom of the modal window.
- Section 5:** The top right corner of the interface, showing the '5' in the top right corner.

Archive or Unarchive Goals

Recommendation is 1 to 4 individual goals for each staff member. You should have no more than 10 individual goals in Workday.

Goal weight is in the Additional Details section. The total weight of all goals combined should equal 100%. For example: Goal 1 (50%) + Goal 2 (50%) = total goal weight (100%).

Select All ☐

Active 2 items

Archive	Goal	*Category	*Status	Completed On	Associated Reviews
<input type="checkbox"/>	Prior Year Goal #1	Performance Goal	Completed	06/30/2024	
<input type="checkbox"/>	Prior Year Goal #2	Performance Goal	Completed	06/30/2024	

Select All ☐

Archived 0 items

Unarchive	Goal	Relates To	*Category	*Status	Completed On	Associated Reviews
No Data						

OK Cancel

Accessing Archived Goals

1. From your employee profile, select **Performance** on the menu.
2. From the Goals tab, select **Archived Goals**.
3. All previously archived goals will be listed here. To unarchive a goal, select **Unarchive Goal**.
4. To view the details of the goal, select the **three dots** and **View Goal**.

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



The screenshot illustrates the process of accessing archived goals in the myworkday system. It is divided into two main sections: the top right shows the 'Goals' tab with the 'Archived Goals' sub-tab selected (marked with a '2'), and the bottom section shows the 'Archived Goals' view with two goal cards (marked with a '3').

Top Right Section (Goals Tab):

- Navigation tabs: Goals, Development Items, Performance Reviews, Reviews.
- Buttons: Create Goal, Archive or Unarchive Goals.
- Sub-tabs: Individual Goals, Archived Goals (selected), Organization Goals.
- Goal Cards:
 - IN PROGRESS Goal #1:** Due Date 06/30/2025, Organization Alignment INNOVATION PILLAR GOAL - Value Based Care, Category Performance Goal.
 - NOT STARTED Goal #2:** Due Date 06/30/2025, Organization Alignment QUALITY PILLAR GOAL - Readmission Rates, Category Performance Goal.

Bottom Section (Archived Goals View):

- Navigation tabs: Individual Goals, Archived Goals (selected), Organization Goals.
- Goal Cards:
 - ARCHIVED Prior Year Goal #2:** Due Date 06/30/2024, Organization Alignment INNOVATION PILLAR GOAL - Academic Performance, Category Performance Goal. Includes an 'Unarchive Goal' button (marked with a '3') and a three-dot menu.
 - ARCHIVED Prior Year Goal #1:** Due Date 06/30/2024, Organization Alignment GROWTH & FINANCE PILLAR GOAL - Key Outpatient Procedures Volumes, Category Performance Goal. Includes an 'Unarchive Goal' button and a three-dot menu (marked with a '4').
- A 'View Goal' button is located at the bottom right of the Archived Goals view.

Manager

Manager Responsibilities

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.



Editable vs. Non-Editable Goals

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.

Goal Details

Additional Details

Milestones

History

*

B I

Editable Goal

B I

Editable Goal Description

*

▼

*

...

➤

...

*

Additional Details

History

50

(empty)

Additional Details

History

*Milestone

Status

No Data

Editable vs. Non-Editable Goals

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.

The screenshot displays the Workday Goals interface for a non-editable goal. The 'Goal Details' tab is selected, showing fields for Goal, Description, Status, Category, Organization Alignment, and Due Date. The 'Status' field is highlighted with an orange box, showing a dropdown menu with 'select one' as the only option. The 'Additional Details' tab is also shown, displaying 'Weight' as 50 and 'Associated Reviews' as empty. The 'Milestones' tab is shown at the bottom, displaying a table with one row for a milestone and a 'No Data' message.

Goal	Status	Category	Organization Alignment	Due Date
	* Non-Editable Goal	* Performance Goal	QUALITY PILLAR GOAL - Readmission Rates (Public)	* 06/14/2025

Description: Non-Editable Goal Description

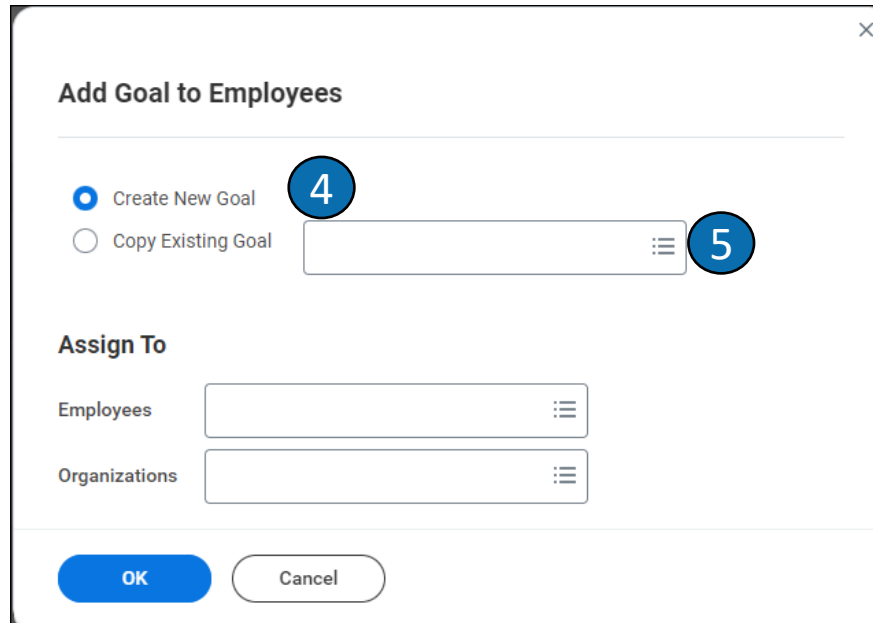
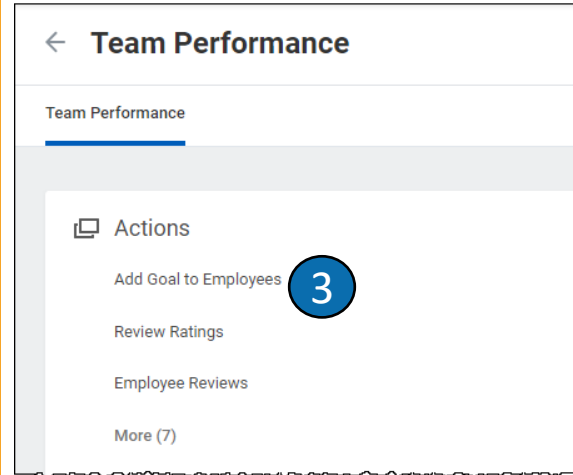
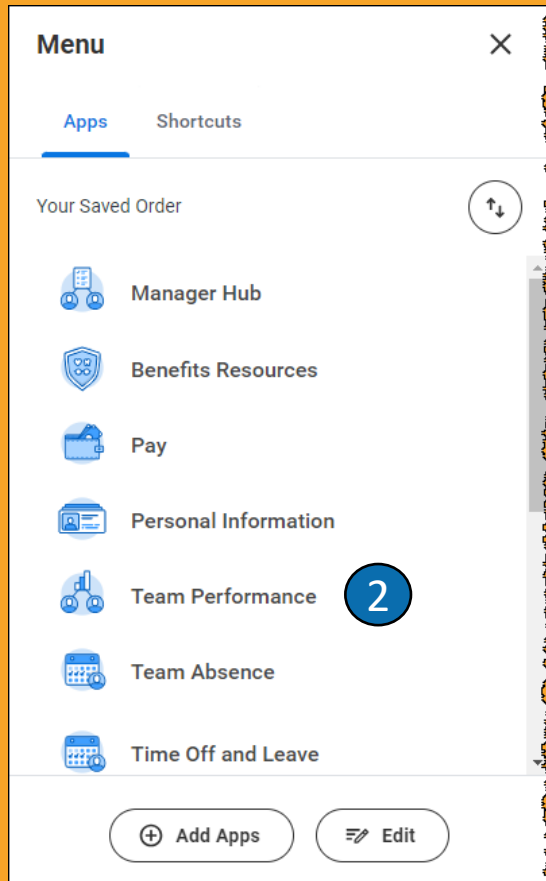
Weight: 50

Associated Reviews: (empty)

Milestones	Due Date	Status
*Milestone		

No Data

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) **2**
- ☒ Sandy Beech (0123456)
- ☒ Dinah Mite (0012345)

Organizations

OK **3** Cancel

Goal

Description

Category

Organization Alignment

Weight

Due Date

Editable ☒ **9**

Remove

Add

Submit **Save for Later** **Cancel**

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 22**.
6. Select Organization Alignment to add a Pillar Goal. Follow the steps on **Slide 21**.
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.

Cascade Goals

The screenshot shows a dialog box titled "Add Goal to Employees" with a close button (X) in the top right corner. It contains two radio buttons: "Create New Goal" (unselected) and "Copy Existing Goal" (selected). Below the radio buttons is a search bar and a list of goals, with "Example Cascaded Goal" selected. To the right of the dialog, two dropdown menus are shown. The first dropdown, titled "Search", lists "My Goals", "My Organizations' Individual Goals", "My Organization Goals", and "Goals by Category". The second dropdown, titled "Search", shows a back arrow and "My Goals", with "Example Cascaded Goal" selected. Below it, "Example Individual Goal" is also visible. At the bottom of the dialog are "OK" and "Cancel" buttons. The "Assign To" section has "Employees" and "Organizations" labels, with "Organizations" currently selected and showing "VUMC Department (Artie Chokie) (1234567) (S98765AA)". There is also an "Include Subordinate Organizations" checkbox which is unchecked.

Add Goal to Employees

☐ Create New Goal

☒ Copy Existing Goal

× Example Cascaded Goal ...

Assign To

Employees

Organizations

Include Subordinate Organizations ☐

OK Cancel

Search

- My Goals
- My Organizations' Individual Goals
- My Organization Goals
- Goals by Category

Search

- ← My Goals
- ☒ Example Cascaded Goal
- ☐ Example Individual Goal

1. If a manager or director wishes to cascade a goal down to their team, they must first have a goal set up in the system for themselves. (follow steps on **slide 29**).
2. To use this goal for your employees, select **Copy Existing Goal** and **My Goals**. Then choose the goal from the list to cascade to your team.
3. From here, if you have other managers working under your team, they can cascade the same goal to their employees by following the instructions in **step 2**.
4. The details of the goal can be updated after selecting **OK**.

Copy Existing Goal

Add Goal to Employees

☐ Create New Goal
☒ Copy Existing Goal

PEOPLE PILLAR GOAL - Employee Engagement (Public) 1

Assign To

Employees

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

Include Subordinate Organizations ☐

OK 3 Cancel

Assign To 1

Goal *
GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand

Description
We invest our resources in a manner that supports our long-term obligation to society; to achieve local, national, and worldwide impact in improving health.

Category * 4

Organization Alignment
GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand (Public)

Weight 0 5

Due Date * MM/DD/YYYY 6

Editable ☒ 7

Remove

Add

Submit 8 Save for Later Cancel

1. Select **Copy Existing Goal** and use the steps on **Slide 21** 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 22**.
 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

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

1. Next to **Copy Existing Goal** or **Organization Alignment** (located in the goal form), select the prompt button.
2. Select **My Organization Goals**.
3. Select **Office of the CEO Department**.
4. Select **FY2025 Pillar Goals**.
5. A list of the Pillar Goals will appear. Select the appropriate **Pillar Goal**.

Step 1: In the goal form, click the prompt button next to **Copy Existing Goal** or **Organization Alignment**.

Step 2: In the dropdown menu, select **My Organization Goals**.

Step 3: In the list of departments, select **Office of the CEO Department (Jeffrey Balser (0024032)) (S108004AA)**.

Step 4: In the list of goal categories, select **FY2025 Pillar Goals**.

Step 5: In the list of pillar goals, select **EQUITY and INNOVATION PILLAR GOAL - Academic Performance (Public)**.


Goal Categories

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

Category	<input type="checkbox"/> Development Goal
	<input type="checkbox"/> Performance Goal
<input type="text" value="Search"/> 	

Note: Only Performance Goals should be weighted.

Employee

Employee Responsibilities

As an employee, you are responsible for:

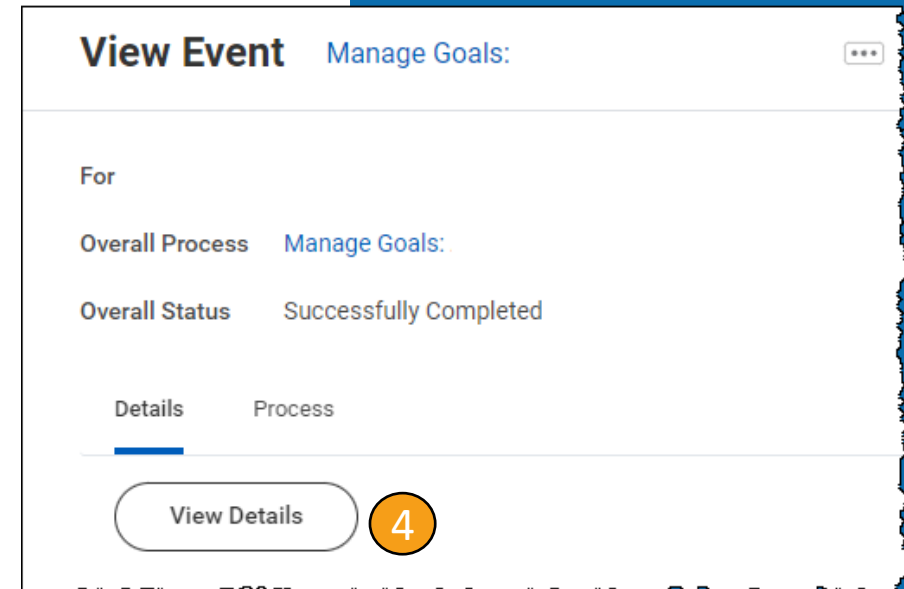
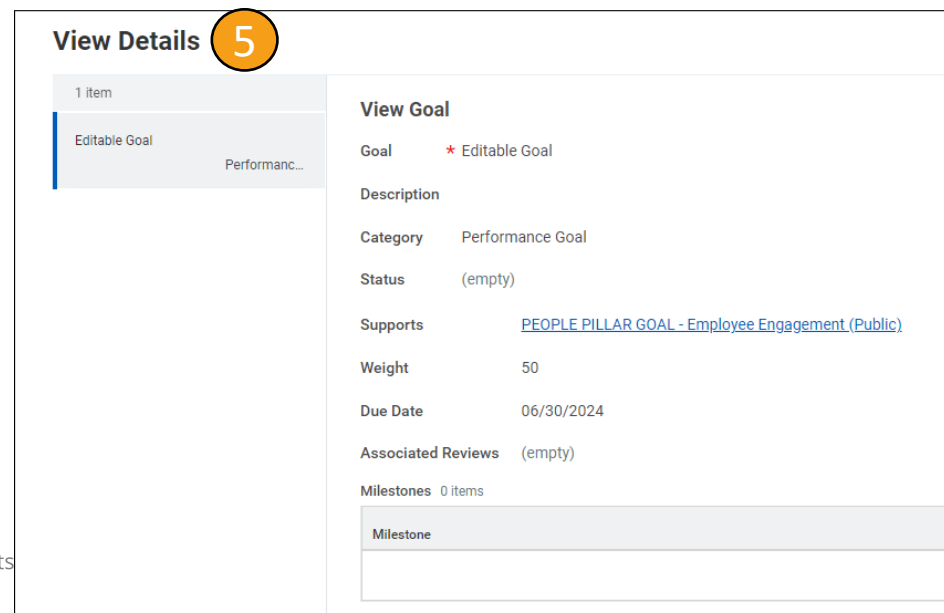
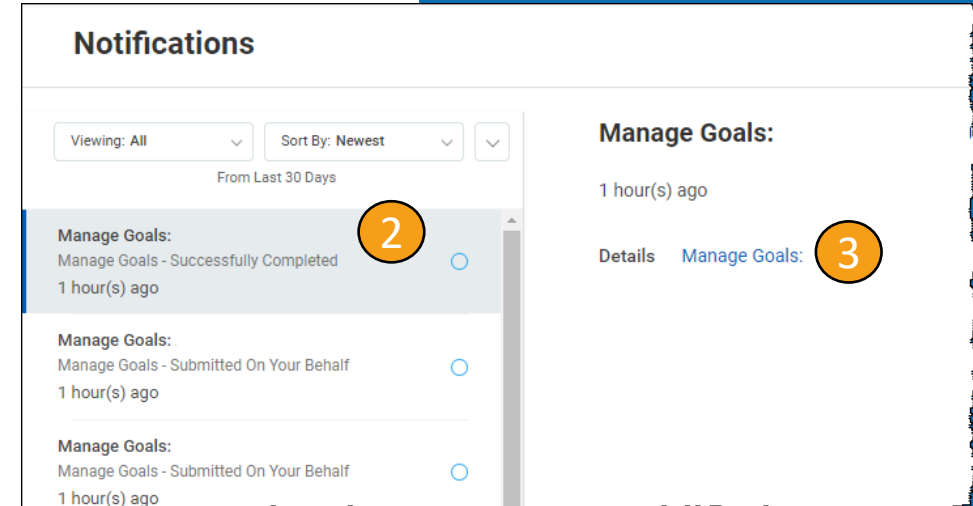
1. Checking in with your manager during existing forums (e.g., 1:1 meetings or team meetings, huddles, rounding) on who is responsible for entering goals into Workday and archiving goals from the previous fiscal year.
2. If applicable, entering goals into Workday.
3. Archiving goals from the previous 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.



Manage Assigned Goals

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

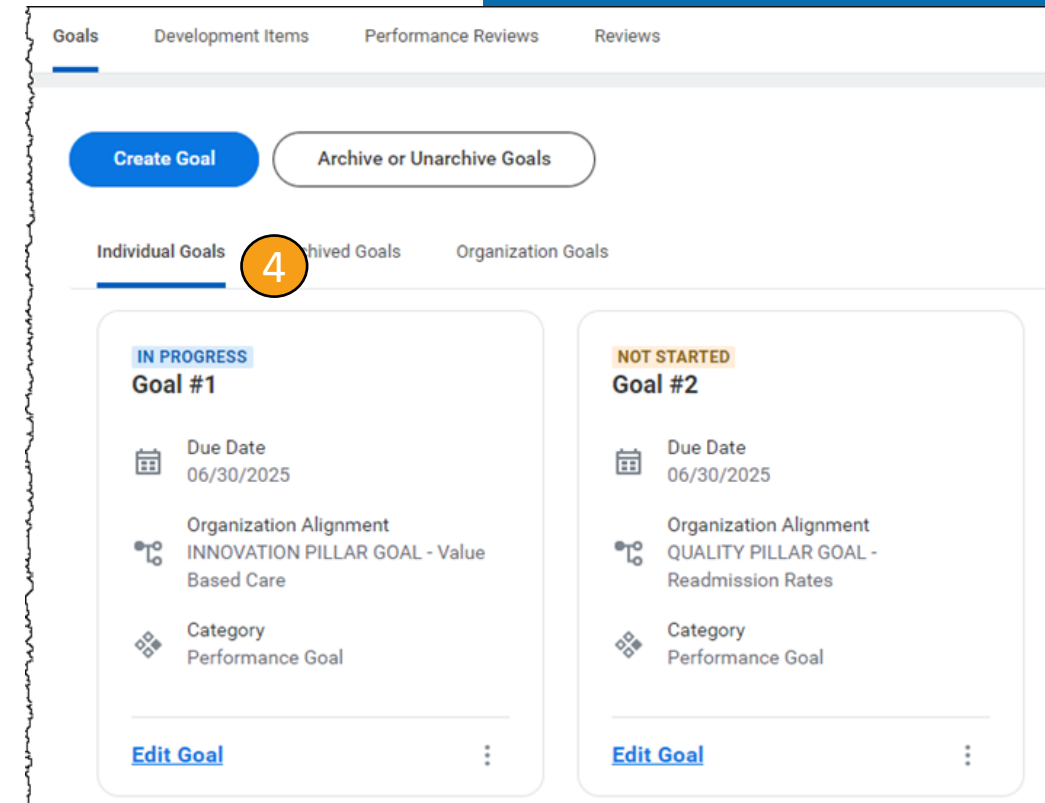
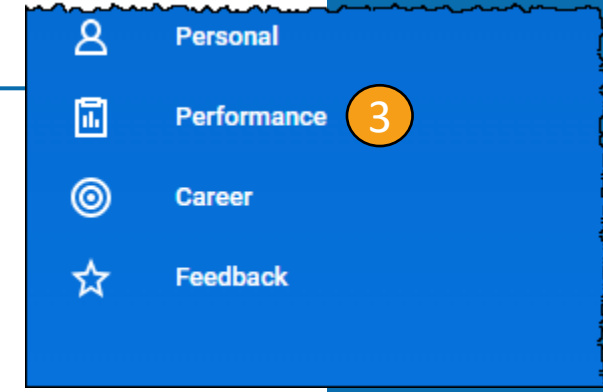
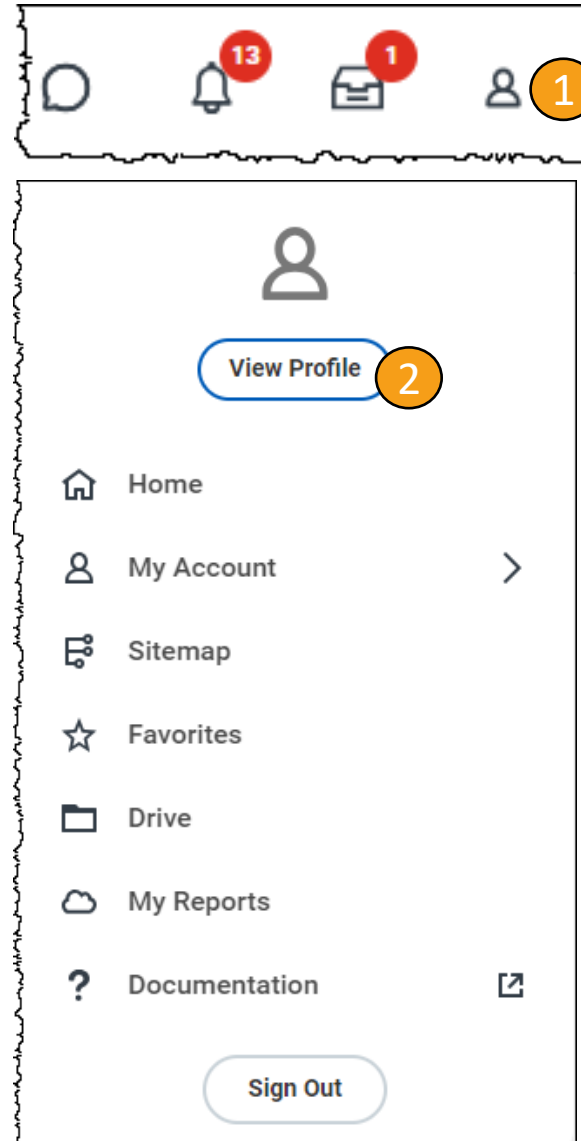
1. Select the **Notifications** icon.
2. Select the **Manage Goals Notification**.
3. Select the link next to **Details**.
4. Select **View Details**.
5. An overview of the goal will be visible. Alternate ways to view goals are on the following slides.



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 **Goals** page, select the card for the goal you wish to edit and select **Edit Goal**.
2. You can edit any of the fields on the page. Employees can update the **Status** of their goal and can also add **Milestones** under the Milestones tab.
3. When you are done editing a goal, select **Submit**.

Note: Goal weight is found under Additional Details.

The screenshot displays the 'Edit Goal' modal in the myworkday system. At the top, a card for 'Goal #1' is shown with a blue 'IN PROGRESS' status tag. The card lists the 'Due Date' as 06/30/2025, 'Organization Alignment' as 'INNOVATION PILLAR GOAL - Value Based Care', and 'Category' as 'Performance Goal'. A blue 'Edit Goal' button with a circled '1' is located at the bottom left of the card.

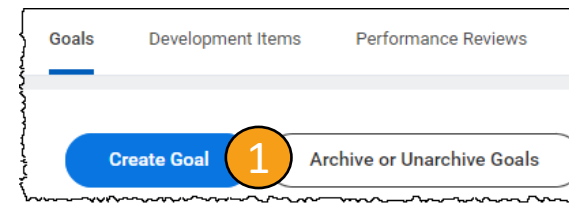
Below the card, the 'Edit Goal' modal is open. It has a close button (X) in the top right corner. The modal contains several tabs: 'Goal Details' (selected), 'Additional Details', 'Milestones', and 'History'. A circled '2' is placed over the 'Milestones' tab. The 'Goal Details' tab shows the following fields:

- Goal:** A text field with the value 'Goal #1' and a rich text editor toolbar above it.
- Description:** A text field with a rich text editor toolbar above it.
- Status:** A dropdown menu with 'In Progress' selected. A circled '2' is placed over this field.
- Category:** A dropdown menu with 'Performance Goal' selected.
- Organization Alignment:** A dropdown menu with 'INNOVATION PILLAR GOAL - Value Based Care (Public)' selected.
- Due Date:** A date picker field showing '06/30/2025'.

At the bottom of the modal, there are three buttons: 'Cancel', 'Save for Later', and 'Submit'. A circled '3' is placed over the 'Submit' button.

Add New Goal

1. From the **Goals** page, select **Create Goal**.
2. Under the Goal Details tab, you can insert a **Goal name, Description, Status, Category** (Slide 22), **Organization Alignment** (Slide 21), and **Due Date**.
3. Under the Additional Details tab, you can enter the **Weight** (Total goal weight should not exceed 100).
4. On the Milestones tab, you can add **Milestones** that will help you achieve your goal.
5. When you are done adding a goal, select **Submit**.



This screenshot shows the 'Create Goal' form with the 'Goal Details' tab selected. The form includes fields for Goal, Description, Status, Category, Organization Alignment, and Due Date. The 'Submit' button is highlighted with a red circle and the number 2.

This screenshot shows the 'Additional Details' tab in the 'Create Goal' form. The 'Weight' field is highlighted with a red circle and the number 3.

This screenshot shows the 'Milestones' tab in the 'Create Goal' form. The 'Milestones' table is highlighted with a red circle and the number 4.

This screenshot shows the bottom of the 'Create Goal' form with the 'Submit' button highlighted with a red circle and the number 5.

Conclusion

Key Takeaways

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

[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.

