



Workday Workshop:

Goal Setting
For Managers and Employees

Duration: 30 minutes

Access Workday through the VUMC Network or VPN

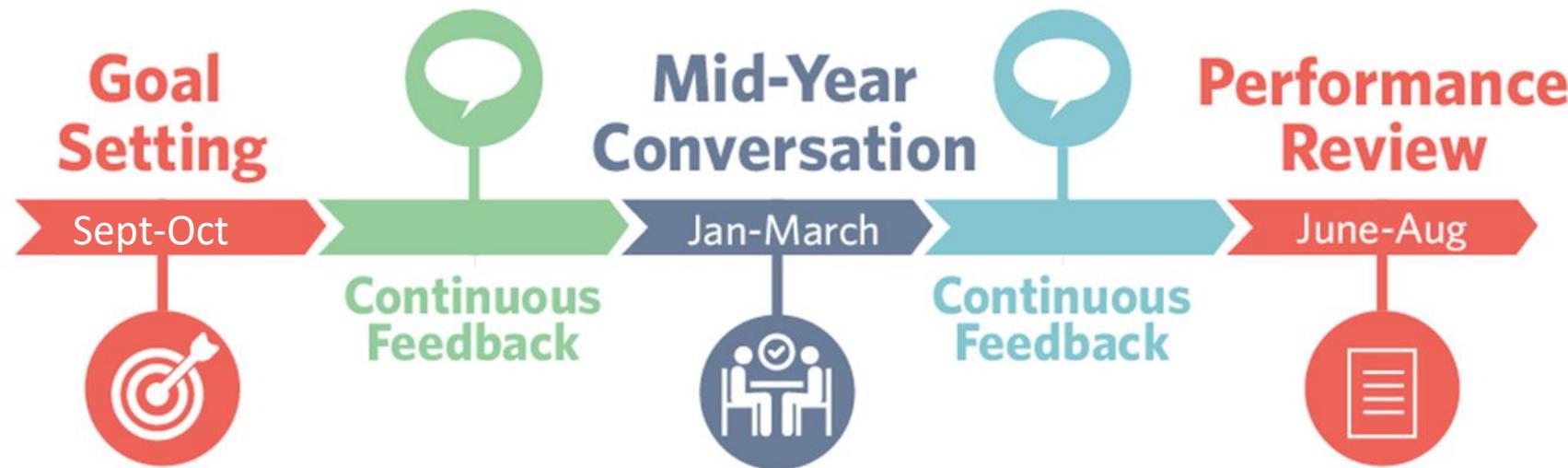
To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)



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.

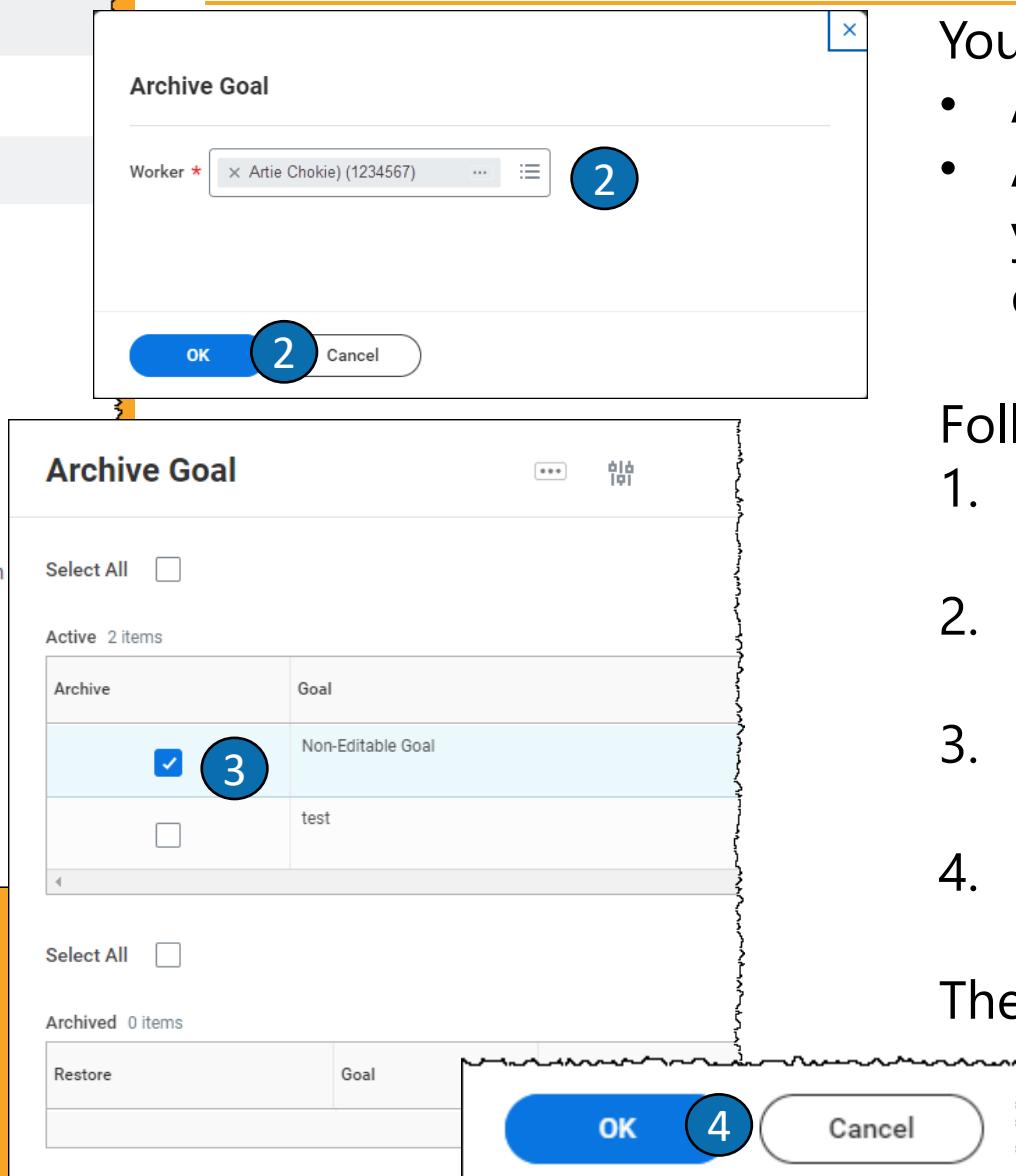
Where can we find archived goals?

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.



Actions[Add Goal to Employees](#)[Review Ratings](#)[Employee Reviews](#)[Give Feedback](#)[My Team's Performance Reviews](#)[Goals](#)[Start Performance Improvement Plan](#)[Archive Goals](#) **1**[Get Feedback on Worker](#)[Get Feedback on Self](#)[Less \(7\)](#)

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.

Actions

Add Goal to Employees

Review Ratings

Employee Reviews

Give Feedback

My Team's Performance Reviews

Goals

Start Performance Improvement Plan

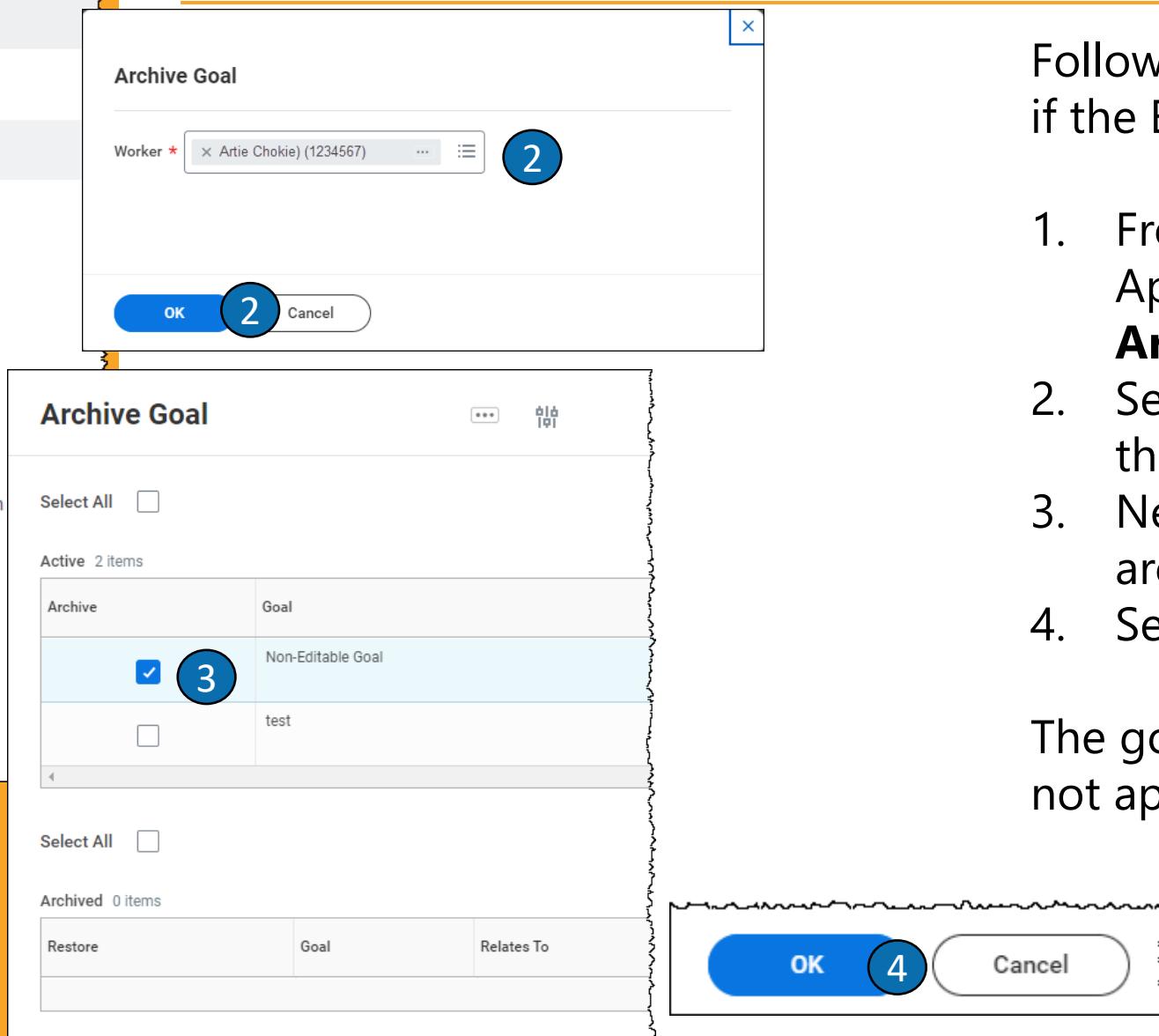
Archive Goals **1**

Get Feedback on Worker

Get Feedback on Self

Less (7)

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 (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 shows a dropdown menu with several options: Absence, Pay, Contact, Personal, Performance (which is highlighted with a yellow circle containing the number 1), Career, and Feedback.

The main interface shows the 'Goals' tab selected. A button labeled 'Archive or Unarchive Goals' is highlighted with a yellow circle containing the number 2.

The 'Individual Goals' section displays two completed goals:

- Prior Year Goal #2** (Due Date: 06/30/2024, Category: Performance Goal)
- Prior Year Goal #1** (Due Date: 06/30/2024, Category: Performance Goal)

A modal window titled 'Archive or Unarchive Goals' is open. It contains a table with two 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	

The 'Select All' checkbox is checked. Below the table, there is an 'Archived' section with a table showing 0 items.

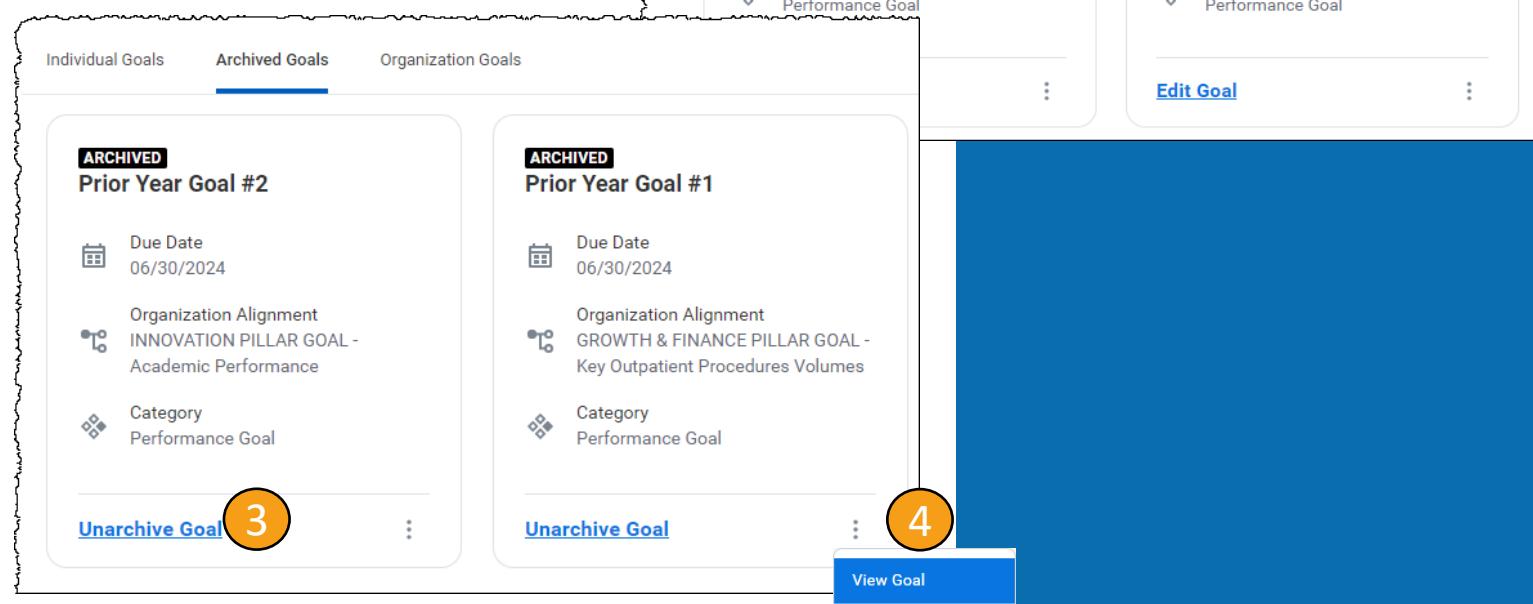
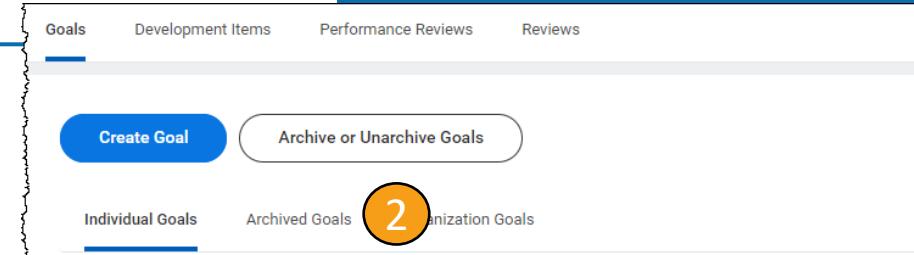
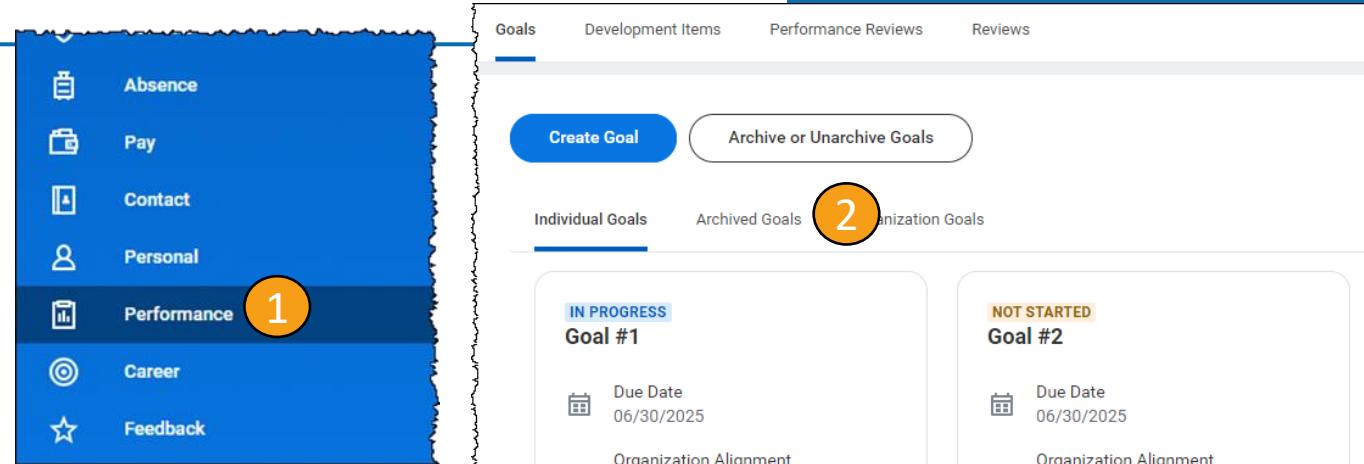
At the bottom of the modal, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted with a yellow circle containing the number 4.



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.



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



Editable vs. Non-Editable Goals

Goal Details Additional Details Milestones History

Goal
* Format **Editable Goal**

Description
Format **Editable Goal Description**

Status
* select one

Category
* **Performance Goal**

Organization Alignment
SERVICE PILLAR GOAL - Access Center (Public)

Due Date
* 06/30/2025

Goal Details Additional Details Milestones History

Weight 50

Associated Reviews (empty)

Goal Details Additional Details Milestones History

Milestones 0 items

*Milestone Due Date Status

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

Goal Details Additional Details Milestones History

Goal * Non-Editable Goal

Description Non-Editable Goal Description

Status * select one

Category * Performance Goal

Organization Alignment QUALITY PILLAR GOAL - Readmission Rates (Public)

Due Date * 06/14/2025

Goal Details Additional Details Milestones History

Weight 50

Associated Reviews (empty)

Goal Details Additional Details Milestones History

Milestones 0 items

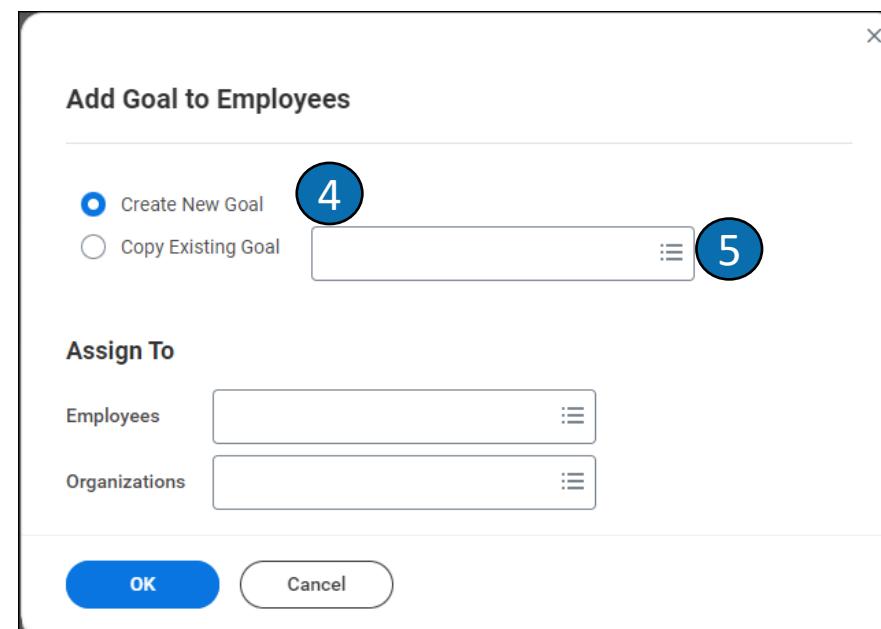
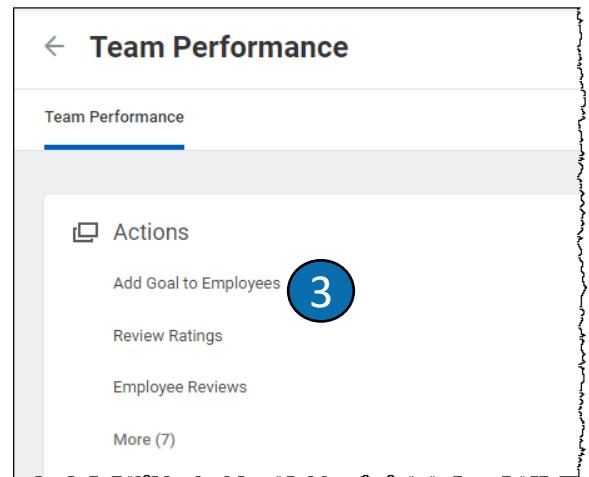
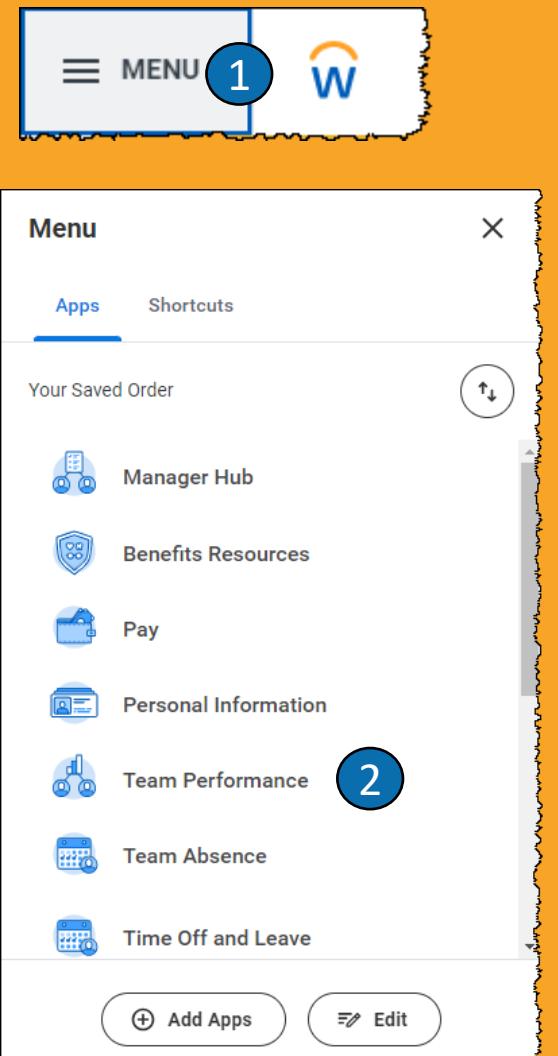
	*Milestone	Due Date	Status
No Data			

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

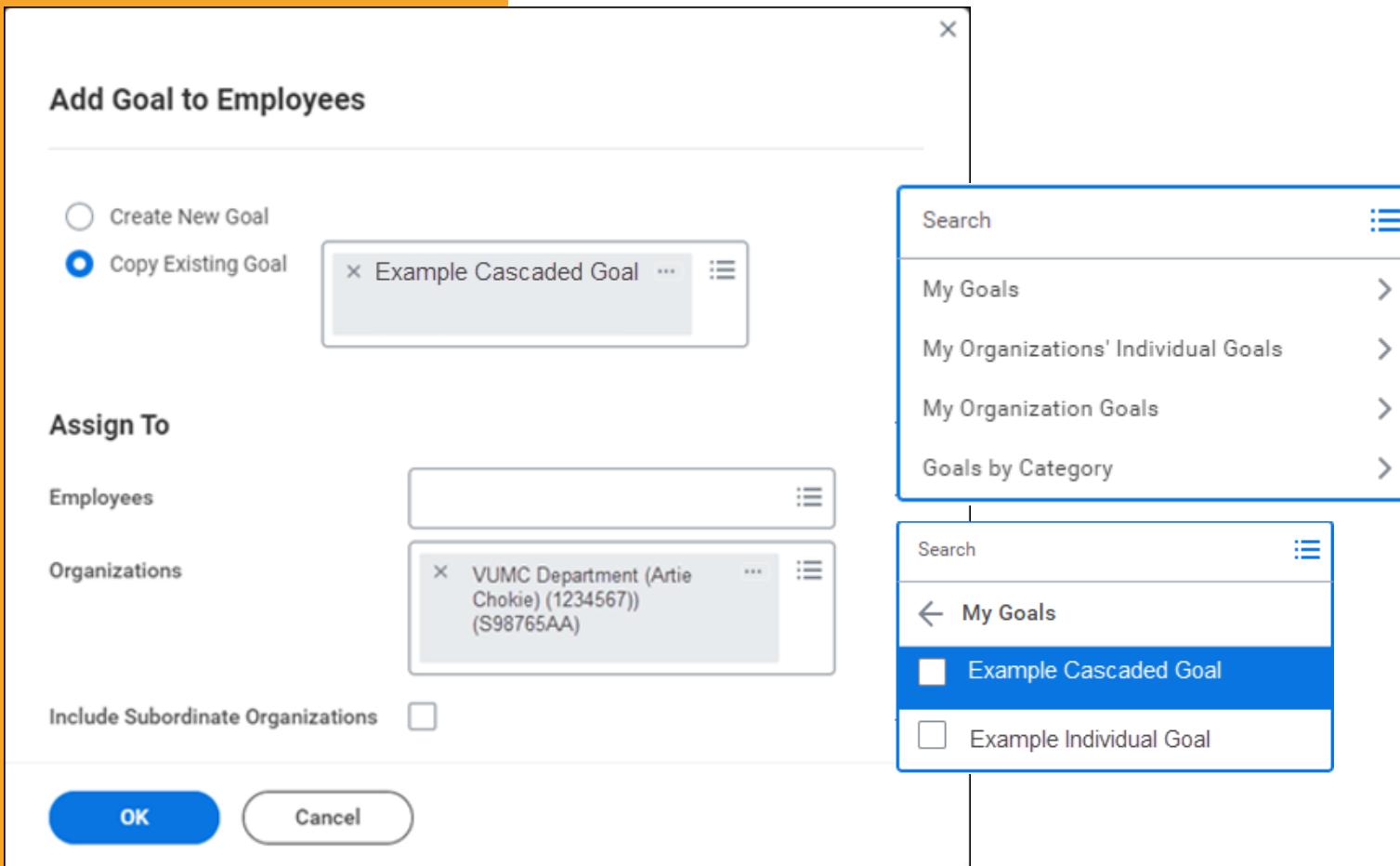
The image shows a user interface for creating a new goal. On the left, a modal dialog titled 'Add Goal to Employees' is open. It contains two radio buttons: 'Create New Goal' (selected) and 'Copy Existing Goal'. Below this is a section titled 'Assign To' with two dropdown menus: 'Employees' (containing 'Holly Wood (1234567)', 'Sandy Beech (0123456)', and 'Dinah Mite (0012345)') and 'Organizations' (empty). At the bottom of the dialog are 'OK' and 'Cancel' buttons, with 'OK' highlighted with a blue circle and the number '3'.

The main form on the right is titled 'Create New Goal'. It has a 'Goal' section with two text areas for 'Goal' and 'Description', both with 'Format' buttons. Below this is a 'Category' section with a dropdown menu, followed by 'Organization Alignment' and 'Weight' fields (set to 0). The 'Due Date' field is a date picker, and the 'Editable' checkbox is checked. At the bottom are 'Remove', 'Add', 'Submit', 'Save for Later', and 'Cancel' buttons.

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**.

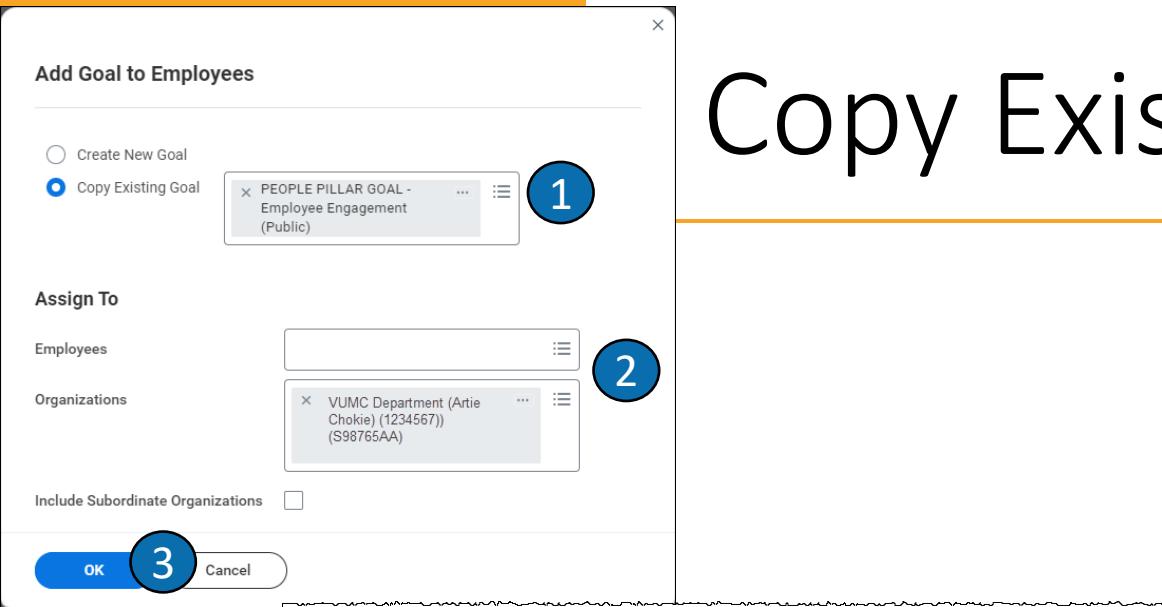
Note: You can add multiple goals using the **Add** button. Use the **Remove** button to delete a goal.

Cascade Goals



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



The screenshot shows the 'Assign To' dialog box. It contains fields for 'Goal' (with a rich text editor containing 'GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand'), 'Description' (with a rich text editor containing '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' (a dropdown highlighted with a blue circle containing the number 4, showing 'GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand (Public)'), 'Organization Alignment' (a dropdown highlighted with a blue circle containing the number 4, showing 'GROWTH & FINANCE PILLAR GOAL - Days Cash On Hand (Public)'), 'Weight' (an input field highlighted with a blue circle containing the number 5, showing '0'), 'Due Date' (a date picker highlighted with a blue circle containing the number 6), 'Editable' (a checkbox highlighted with a blue circle containing the number 7, checked), and 'Remove' and 'Add' buttons. At the bottom are 'Submit' (highlighted with a blue circle containing the number 8), 'Save for Later', and 'Cancel' buttons.

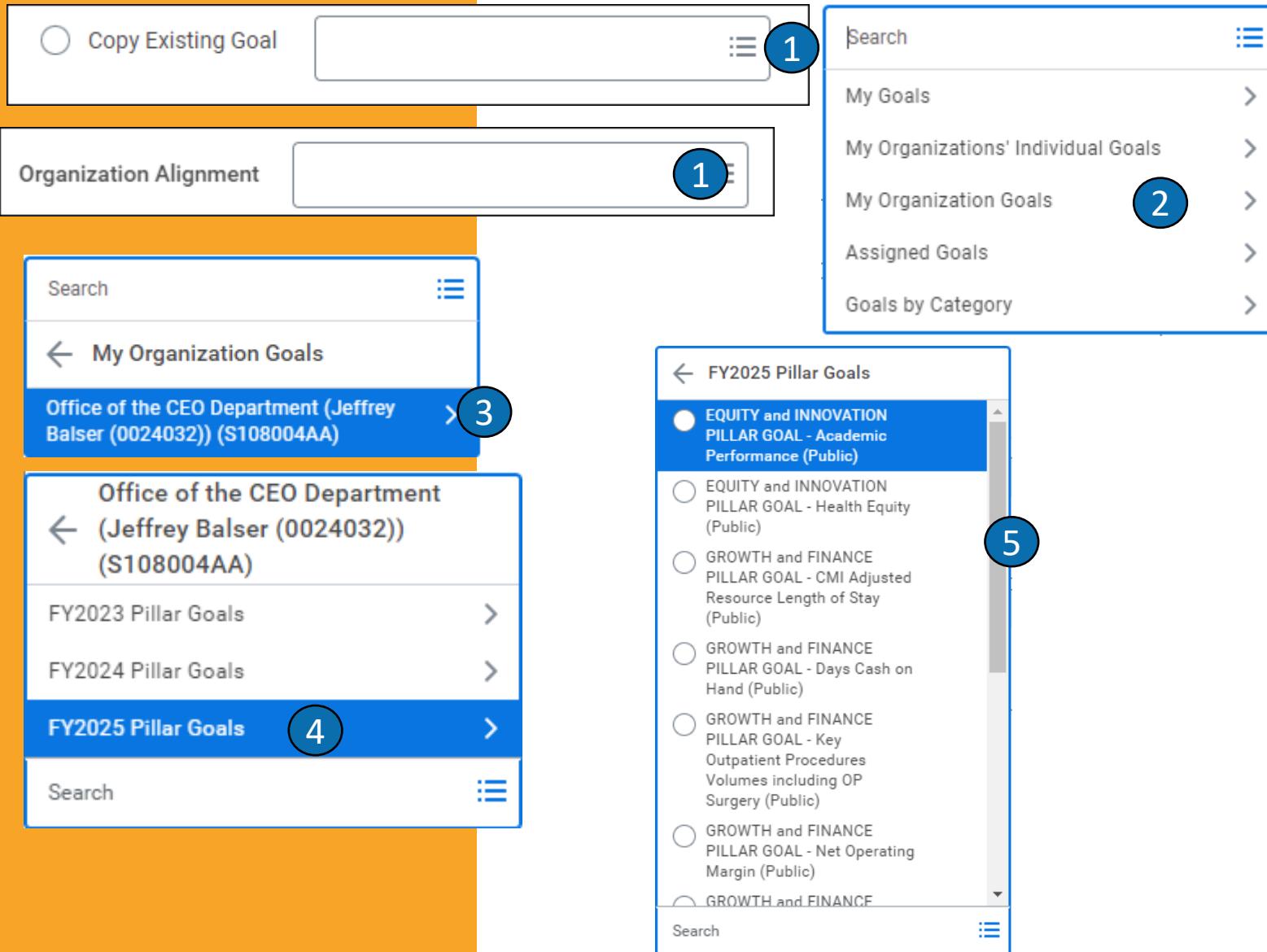
1. Select **Copy Existing Goal** and use the steps on **Slide 21** to choose a **Pillar Goal**.
2. Select individual or multiple **employee(s)** or assign the goal to an **Organization**.
3. Select **OK**.

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**.

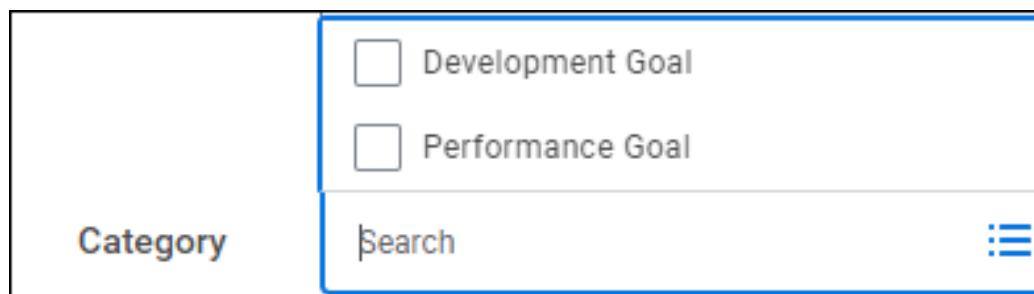
Goal Categories

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



Note: Only Performance Goals should be weighted.

Employee

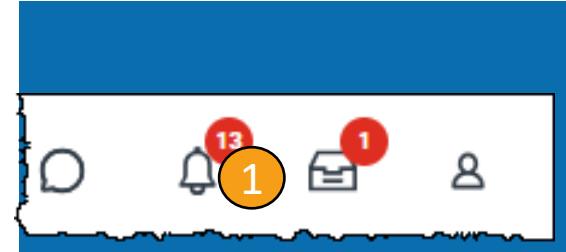
Employee Responsibilities

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.

Notifications

Viewing: All Sort By: Newest From Last 30 Days

Manage Goals:
Manage Goals - Successfully Completed 1 hour(s) ago (2)

Manage Goals:
Manage Goals - Submitted On Your Behalf 1 hour(s) ago

Manage Goals:
Manage Goals - Submitted On Your Behalf 1 hour(s) ago (3)

View Event **Manage Goals:**

For

Overall Process **Manage Goals:**

Overall Status Successfully Completed

Details Process

View Details (4)

View Details (5)

1 item

Editable Goal	Performanc...
Editable Goal	Performance...

View Goal

Goal * Editable Goal

Description

Category Performance Goal

Status (empty)

Supports [PEOPLE PILLAR GOAL - Employee Engagement \(Public\)](#)

Weight 50

Due Date 06/30/2024

Associated Reviews (empty)

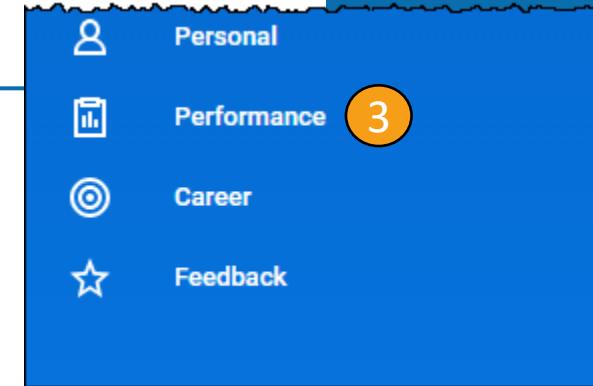
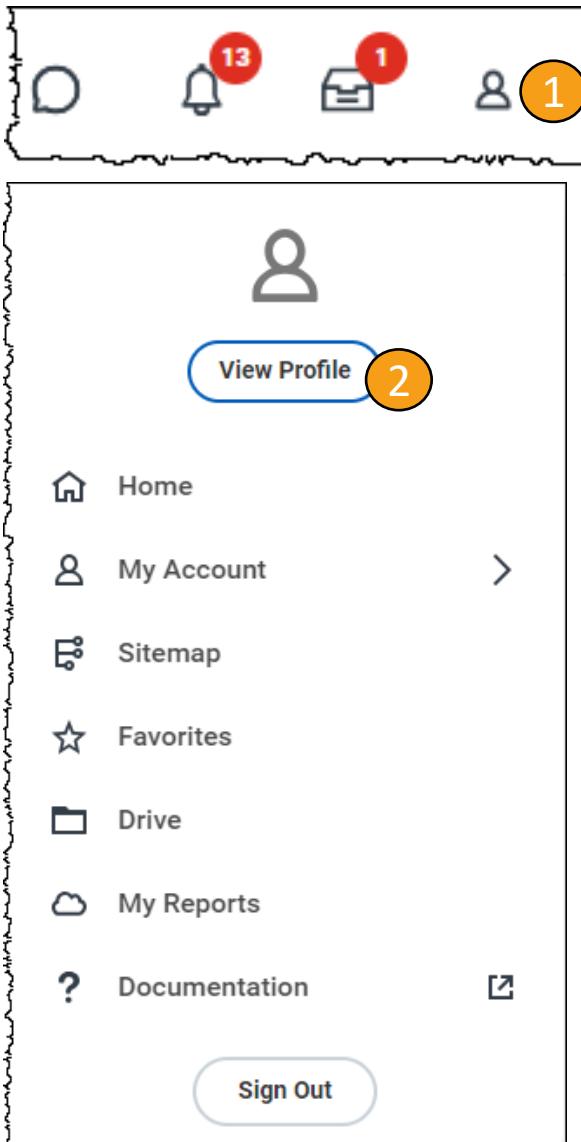
Milestones 0 items

Milestone

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.

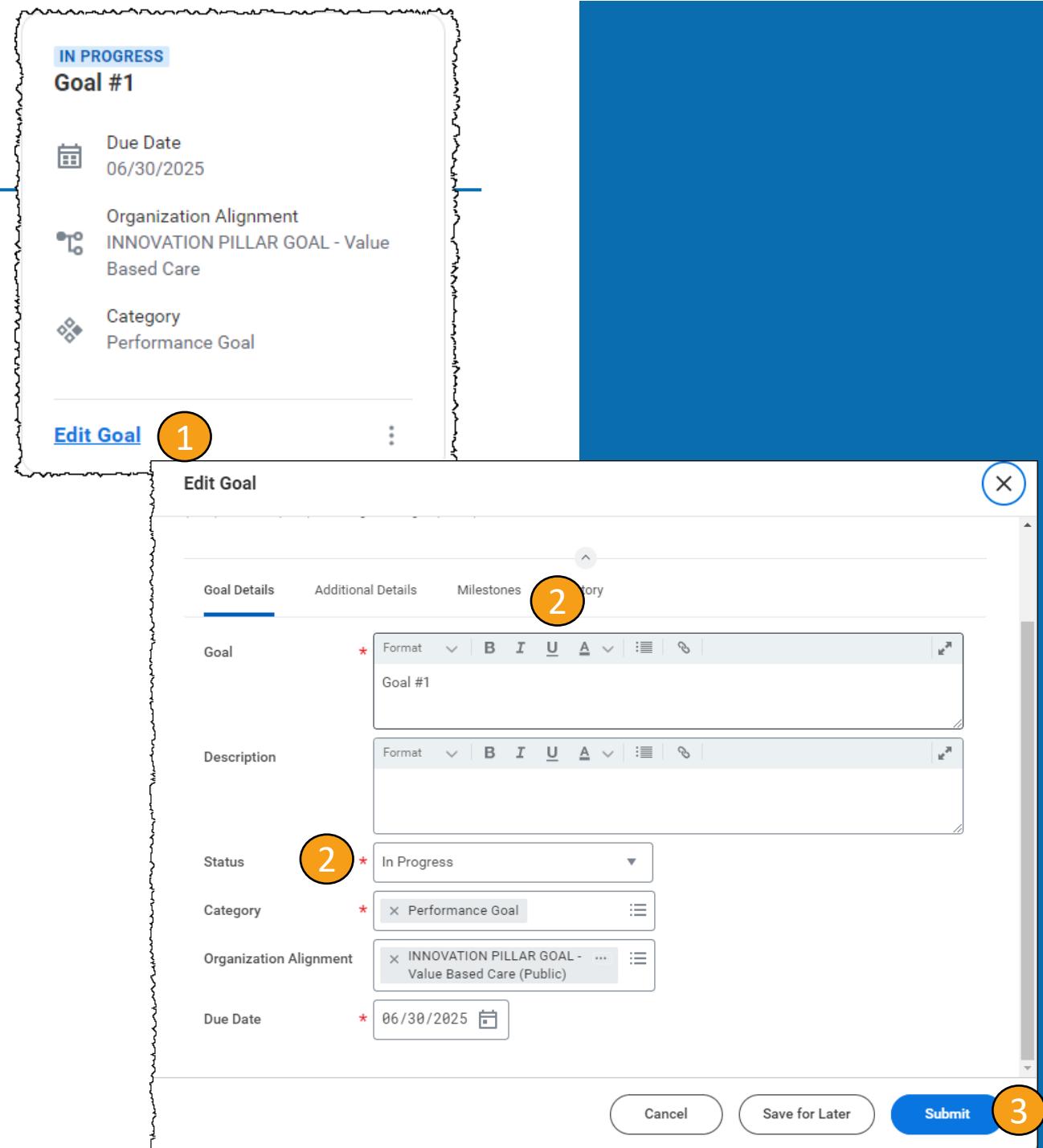


The image shows the 'Goals' page in the Workday interface. It features a navigation bar with tabs: Goals (selected), Development Items, Performance Reviews, and Reviews. Below this are buttons for 'Create Goal' and 'Archive or Unarchive Goals'. The main content area is divided into three sections: 'Individual Goals' (selected), 'Shared Goals', and 'Organization Goals'. Each section contains a list of goals with details like 'IN PROGRESS Goal #1' and 'NOT STARTED Goal #2'. At the bottom of each goal card are 'Edit Goal' and a more options button (three dots).

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 shows the 'Edit Goal' dialog box overlaid on a card from the 'Goals' page. The card displays the following details:

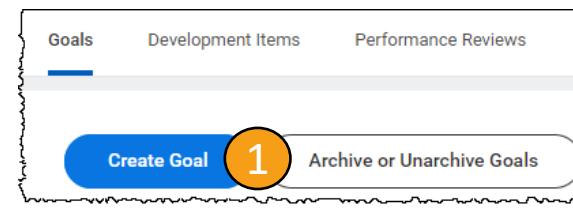
- IN PROGRESS**
- Goal #1**
- Due Date**: 06/30/2025
- Organization Alignment**: INNOVATION PILLAR GOAL - Value Based Care
- Category**: Performance Goal

The 'Edit Goal' dialog box contains the following fields:

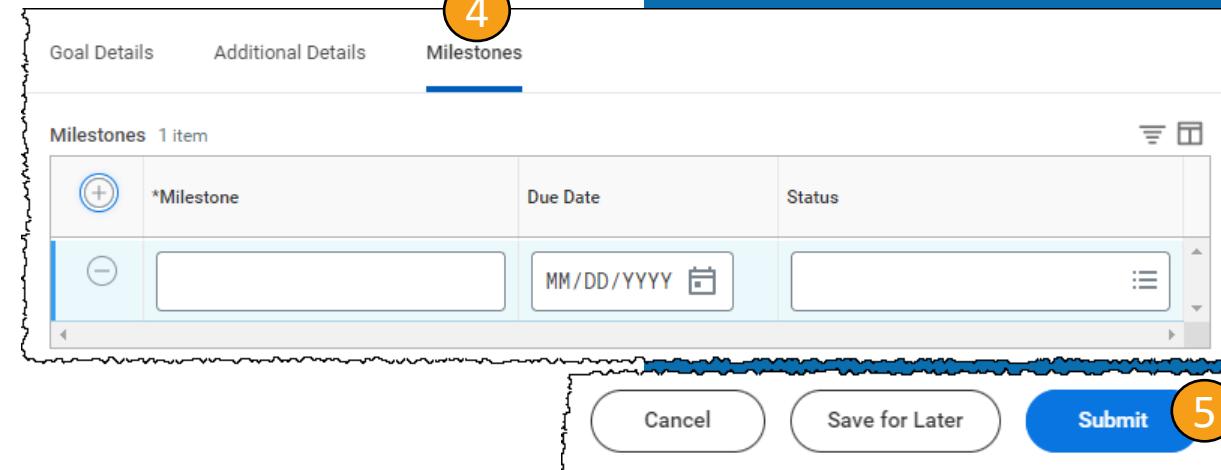
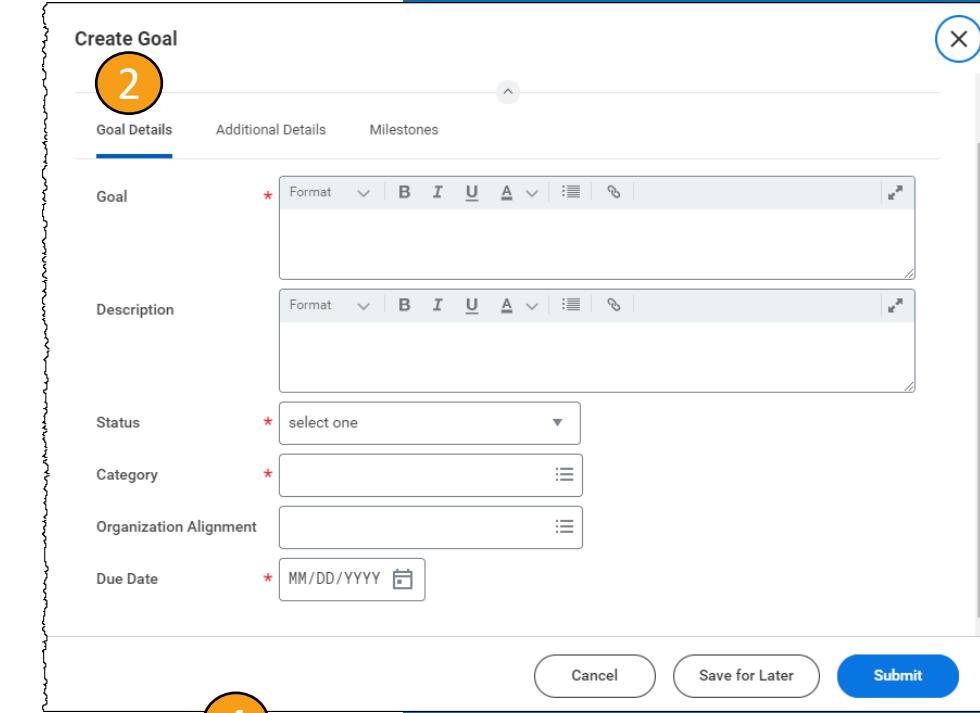
- Goal**: Goal #1 (highlighted with a yellow circle labeled 1)
- Description**: (empty text area)
- Status**: In Progress (highlighted with a yellow circle labeled 2)
- Category**: Performance Goal (highlighted with a yellow circle labeled 2)
- Organization Alignment**: INNOVATION PILLAR GOAL - Value Based Care (Public) (highlighted with a yellow circle labeled 2)
- Due Date**: 06/30/2025

At the bottom of the dialog box are three buttons: **Cancel**, **Save for Later**, and **Submit** (highlighted with a yellow circle labeled 3).

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**.



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.

