Workday Job Aid for Managers

Cascade Goals

Use this job aid to cascade goals to colleagues who report to you. Cascading goals is part of the Goal Cascade/Alignment phase of the performance management process.

To learn more, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.
Manager: Cascade Goals

Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

Cascading Goals

As a manager, you may decide to cascade goals to your direct reports, or your manager may require you to do so.

**Note:** The Talent Manager and HR Partner security roles can cascade goals from any manager in their Ministry.

- **Create Cascade Goal(s):** Manager, HR Partner, Talent Manager
- **Add Cascade Goal(s) to Evaluation:** Manager
- **Complete Evaluation:** Colleague

### Business Process Diagram

- **ROLE:** Manager, Manager’s Manager, HR Partner and/or Talent Manager
- **Colleague**

  - **Create Cascade Goal(s)**
  - **Add Cascade Goal(s) to Evaluation**
  - **Complete Evaluation**

**NOTES:**
- A Manager may or may not have goals to cascade.
- Goals cascaded from a Manager’s Manager, HR Partner, and/or Talent Manager to colleagues do not require Manager approval.

**Exception:** If you are part of the supervisory org in which you are cascading a goal to, your manager will need to approve the cascaded goal.
Manager: Cascade Goals

**Before You Start**

- Ensure you know the goals to cascade. This may include:
  - Goals to cascade from your manager/leader to your direct report(s)
  - Goals you choose to cascade to your direct report(s)
  - A goal setting/alignment discussion with your direct report

- Meet with your direct reports to discuss goals (i.e., cascaded goals, the amount of goals, and the weight of each goal). Colleague goals must total a weight of 100% and align with the People-Centered 2020 Strategic Plan.

**Notifications**

- None.

**Variations**

- This process may vary by Ministry, but there should be no variations to the Workday process across the system.

**Other Resources**

- Contact your local HR Partner or Talent Management Department
- Review additional job aids on the Workday Help website [workday.trinity-health.org](http://workday.trinity-health.org)

**In this Job Aid**

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Create Cascade Goal(s)

**Process Steps**

1. Log in to Workday
2. Click Team Performance
3. Under Actions, click Add Goal to Employees

Create Cascade Goal(s)
4. Click **Create New Goal** to add a new goal or click **Copy Existing Goal** to leverage an existing goal.

5. In the **Assign To** section, click in the **Employees** or **Organizations** field.

6. Click the **Include Subordinate Organizations** box to cascade goals to subordinate organizations.

7. Click **OK**.

**WHAT IS THIS?**

**Create New Goal**
Use this to set/enter a new goal.

**Copy Existing Goal**
Select an existing goal from My Goals, My Organizations’ Individual Goals, My Organization Goals, All Organization Goals, Assigned Goals, or Goals by Category.

**Assign To Employees**
Use this to assign goals to Workers by Manager, Workers by Manager Hierarchy or Workers by Supervisory Organization Hierarchy.

**Assign To Organizations**
Use this to assign goals to My Organizations, Supervisory Organizations by Manager or Supervisory Organizations by Manager Hierarchy.
Create Cascade Goal(s)

8. Type or update your Goal

- **Goal:** Reduce hospital acquired infections by increasing handwashing from 75% to 98% by June 30th.

**NOTES:**
- The weighting of all goals for a colleague must equal 100, including any individual goals.
- A manager can delete a cascaded goal if the Editable box is checked.
- If the Editable box is NOT checked, the HR Partner or Talent Admin will have to delete the cascaded goal.

**Category**
Choose only one option

**Weight**
The weight of how the goal will be measured for final evaluation

**Due Date**
Date the goal must be completed by to meet the goal; date must be in the current fiscal year

**Editable**
Click this box if the goal may be edited by the colleague or manager

**Remove**
Click to delete a goal

**Add**
Click to add another goal

Click the prompt icon for options
Create Cascade Goal(s)

9. Once all goals added/updated, click **Submit**

![Submit button](image)

10. Click **Done**

![Done message](image)
Create Cascade Goal(s)

**End of Process: Next Steps**

- Colleague and Manager are responsible for considering cascaded goals in performance management discussions.
- If a cascaded goal is added during a review period, the Colleague or Manager (Reviewer) may need to add cascaded goal(s) into the performance review.

**SMART Goals**

**Example:** Reduce hospital acquired infections by increasing handwashing from 75% to 98% by June 30.

- **Specific:** Be clear about what is to be done.
- **Measurable:** How will you prove or demonstrate the goal?
- **Attainable:** Is it realistic and within reach?
- **Relevant:** Is it within the scope and aligned to an organizational goal?
- **Time Bound:** Do we know when it must be done?
Add Cascade Goal(s) to Evaluation

Process Steps

1. Log in to Workday
2. Click Inbox
3. Find the task and click to open (opens in the right pane of the screen)
Add Cascade Goal(s) to Evaluation

4. Click **Go to Guided Editor**

5. In the Goals screen, scroll to the bottom of the goals and click **Add**

6. Check the box under **Use Existing Goal**

7. Click the **prompt icon** to find the goal to add using the search box or one of the search options

**NOTE:** It is helpful to know the category of the cascaded goal to narrow down your search options.
Add Cascade Goal(s) to Evaluation

8. Update the goal information

**NOTE:** The weighting of all goals must equal 100. If additional goals are added, you may need to re-weight the goals to total 100. See page 12.

- **Status**
  - Choose from Completed, In Progress, Not Started, or Not Applicable
- **Add Milestone**
  - Click the box to add a milestone
- **Edit Milestone**
  - Update milestones previously added; click the prompt icon to choose from a milestone
- **Rating**
  - Choose from Does Not Meet, Partially Meets, Fully Meets, or Exceeds (Note: A definition for each rating will appear after you select a rating.)
- **Comment**
  - Provide details on performance
Reweighting a Goal

The weighting of all goals must equal 100 or you will not be able to submit an evaluation. If you add or delete goals, you may need to reweight the goals to total 100.

**Process Steps**

1. On the Goals screen, click the **edit icon** of the goal to reweigh

2. Click in the Weighting box and type the new goal weight

Click the **checkmark icon** to accept changes
Delete a Goal

Process Steps

1. Log in to Workday

2. Click Inbox

3. Find the task and click to open (opens in the right pane of the screen)
Delete a Goal

4. Click **Go to Guided Editor**

5. In the Goals screen, scroll to the goal to delete and click the **delete icon**

6. Click **Delete**
Resources

- Workday Help website: http://workday.trinity-health.org
- Trinity Health Strategic Plan: http://intranet.trinity-health.org/web/strategic-planning/documents
- HealthStream: For more information about innovation and performance excellence tools, search for the following course: TH – Innovation and Performance Excellence Introduction.
- Please contact your local HR or Talent Management team for questions regarding performance management.