Workday Job Aid

Setting Goals

Use this job aid to enter goals in Workday. Setting goals is done during the goal cascade/alignment phase of the performance management process.

In this job aid:
• Setting Goals
• Appendix A — Add Existing Goals to Current Period

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

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

Setting a Goal

As a colleague, you are responsible for putting your goals in Workday. Your manager may also cascade goals to you.

Meet with your manager to determine if she/he will cascade goals to you; also discuss the amount of goals you should enter and the weight of each one. Your goals must total a weight of 100% and align with the People-Centered 2020 Strategic Plan.

Core Values are incorporated in our performance expectations (Reverence, Commitment to Those Who Are Poor, Justice, Stewardship, Integrity). Your performance will be rated according to how well you exhibit these as part of achieving your goals.

- **Initial goal(s) discussion:** Colleague and Manager
- **Cascade goal(s):** Manager
- **Enter goals:** Colleague

NOTE:
Managers may or may not have goals to cascade to their direct reports. The goal setting process can begin with you (the colleague) entering goals.
Setting Goals

1. Log in to Workday
2. Click the **Performance** worklet
3. Click **Goals** from the View column
Setting Goals

4. Click **Edit**

5. Click **Add**

6. Type your **SMART Goal** (to reflect an area of the People-Centered 2020 Strategic Plan)

7. Select only one People-Centered 2020 **Category** that best aligns with your SMART goal

8. Select a **Status** (Completed, In Progress, Not Started, Not Applicable)

**HINT:** To add a goal from a prior period to your new goal setting period, see Appendix A.
Setting Goals

9. Type the **Weight** of the goal

10. Select a **Due Date** (this is required; Workday will not calculate goals correctly if this is skipped)

11. Click the **add icon (+)** to add milestones that apply to the goal (you may not have a milestone to add until you have achieved a task related to your goal)

12. Click **Done** when complete or click **Do Another** to add another goal

**NOTE:** The weighting of all goals must equal 100 or you will not be able to submit your Goals (for example, if you have three goals, one could equal 20%, one could equal 40%, and one could equal 40%).
Setting Goals

End of Process: Next Steps

WHEN YOU HAVE ENTERED YOUR GOALS:

- Manager receives a notification in their Inbox to review the colleague’s goal(s)
- Manager will review or edit the goal(s)

SMART Goals

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

S
Specific: Be clear about what is to be done.

M
Measurable: How will you prove or demonstrate the goal?

A
Attainable: Is it realistic and within reach?

R
Relevant: Is it within the scope and aligned to an organizational goal?

T
Time Bound: Do we know when it must be done?
Add Existing Goals to Current Period

1. Log in to Workday
2. Click **Performance**
3. Click **Goal Setting** for the current fiscal year
Add Existing Goals to Current Period

4. **Click Open**

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<table>
<thead>
<tr>
<th>My Actions</th>
<th>Details</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Me</td>
<td>Due Date</td>
<td>Business Process</td>
</tr>
<tr>
<td>Open</td>
<td>Set Content: Goal Setting 2017-18: Carla Colleague (500032)</td>
<td>Goal Setting 2017-18: Carla Colleague (500032)</td>
</tr>
</tbody>
</table>
```

5. **Click Go to Guided Editor**

All employees will participate in goal setting. Managers will have a conversation with direct reports to discuss the annual preparation of SMART (Specific, Measureable, Achievable, Relevant and Time-bound) goals that cascade/align with department, RHM and System strategic goals.
Add Existing Goals to Current Period

6. Click **Add**

7. Click the **Use Existing Goal** box

8. Click the **prompt icon** to choose from existing prior goals to add to the current period
Add Existing Goals to Current Period

9. Review and update the goal form, including Due Date; click the **checkmark icon** to accept changes.

10. Click **Add** to add an additional goal, or click **Next** to move on.

**NOTE:** The weighting of all goals must equal 100 or you will not be able to submit your Goals.
Add Existing Goals to Current Period

11. Review the summary screen; click the **edit icon** to make edits or click **Guide Me** to return to the section

12. Click **Submit** when complete

13. Your goals are sent to your manager for review and approval; click **Done**