

Performance Management: Goal Setting for Team Members

All employees are expected to write goals at the beginning of the performance cycle. The following assists in writing and editing goals in Workday. The Performance Management website provides information, specific to the Health System, to write a S.M.A.R.T goal and ensure success in reaching goals. <https://hr.virginia.edu/career-development/performance-management-process/performance-management-resources/goals>

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Cascaded Goals Assigned to You (MC Only)

Your manager will cascade (assign) two goals to you for the FY20 performance year. You will receive a Workday task in Outlook. Click on the task link or navigate to your Workday inbox to see your manager's cascaded goals. Team members must write three (3) additional goals which should include:

- A. 2 goals related to your job description
- B. 1 professional development goal

Write Goals from the Inbox Task

At the beginning of the performance year, HR will send a goal setting task titled **Set Review Content** to all employees. This step sets expectations for the employee and manager for the coming year but goals can be written or edited throughout the year.

Important: Three (3) active goals are required for SOM and UPG and **five (5)** goals are require for Medical Center.

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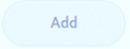
1. Click on the link in the Outlook email or open Workday and click on the Inbox icon.
2. Locate the task titled: **Set Review Content**.
3. Click on the **Go to Guided Editor** for a section-by-section view or **Go to Summary Editor** to view all sections on a scrollable page. We will use **Guided Editor** for this job aid.

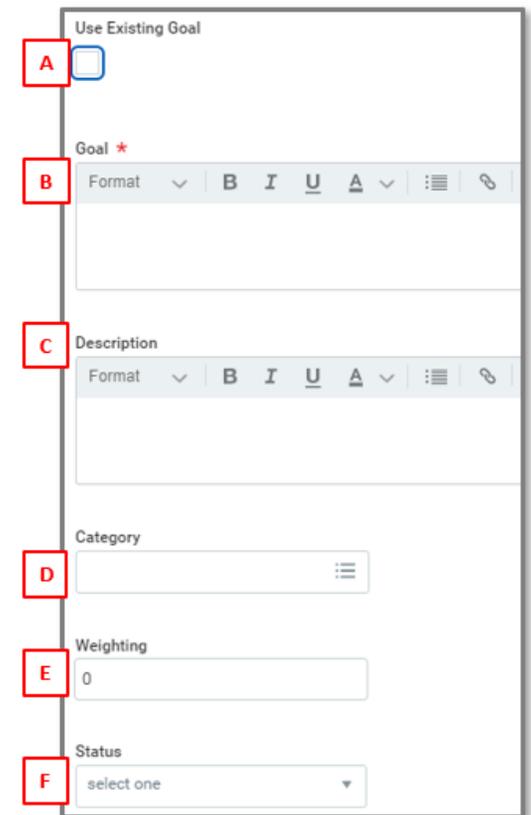


A screenshot of a Workday task page. On the left is a sidebar with 'Actions (1)' and 'Archive' tabs. Below these are filters for 'Viewing: All' and 'Sort By: Newest'. A task card is visible in the sidebar, titled 'Set Content: Health System Goal Setting with Weighting Methodology' and dated '18 second(s) ago - Effective 06/30/2020'. The main content area features a blue circular profile icon, the task title 'Set Review Content', and a sub-title 'Set Content: Health System Goal Setting with Weighting: Employee Name'. Below this is the text '18 second(s) ago - Effective 06/30/2020'. The main body of the task contains the heading 'Annual Goal Setting:' followed by two paragraphs of text. The first paragraph explains the goal setting process. The second paragraph mentions ASPIRE values and includes a link 'here'. A third paragraph mentions a 'website' link. At the bottom of the page, there are two buttons: 'Go to Guided Editor' and 'Go to Summary Editor'. The 'Go to Guided Editor' button is highlighted with a red box. Below the buttons are two small icons: a calendar icon and a document icon.

Screenshot 1: Set Review Content Inbox Item

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4. Review the goals cascaded by your manager. If no cascaded goals are present, skip to the section in this job aid titled: **My Cascaded Goals Are Missing**.
5. Click  to enter a goal.
 - A. Skip the **Use Existing Goal** checkbox, but if you already wrote goals in the Performance area of the Worker Profile skip to the section titled: **I Wrote my Goals Already. Why Aren't they in the Template?**
 - B. Enter a title for your goal. It is highly recommended that you put the fiscal year in the goal title to differentiate the from goals from previous years.
 - a. SOM – Highly recommended that 1 professional development goal is included
 - b. UPG – Highly recommended that 1 professional development goal is included
 - c. MC – Required: 2 job descriptions goals and 1 professional development goal
 - C. Enter a description, including a time frame for completion and a definition of success for Meets Expectations and Exceeds Expectations.
 - D. **Category** is optional. Use **Individual** for your own goals. **Team** goals are cascaded by a manager and **Organizational** goals are cascaded from higher levels in the organization.
 - E. Enter a whole number weight for the goal. Weighting allows you to place higher value on more complex, or value-added goals and less value on goals needing less effort or time. Once all goals are weighted, together they should equal 100%.
 - F. **Status** allows you to display your progress. Change the status to **In Progress** while working on the goal and **Complete** when a goal has been accomplished.
CAUTION: If the status is updated to **No Longer Needed**, and when submitted, is approved by the manager, the goal will not appear in the self-evaluation.



The screenshot shows a form titled "Use Existing Goal" with several input fields. Red boxes labeled A through F point to the following elements:

- A:** A checkbox labeled "Use Existing Goal".
- B:** A text input field for the "Goal" title, which includes a rich text editor toolbar with options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), List, and Link.
- C:** A text input field for the "Description", which also includes a rich text editor toolbar.
- D:** A dropdown menu for the "Category" field.
- E:** A text input field for the "Weighting" value, currently showing "0".
- F:** A dropdown menu for the "Status" field, currently showing "select one".

Screenshot 2: Fields to Add a Goal

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6. Click the **Add** button to enter additional goals. A minimum of 3 goals from SOM and UPG and 5 goals for MC team members, including cascaded goals are needed to submit a self-evaluation at the close of the performance cycle. Your department, or entity may have additional requirements.
7. Click **Next**.
8. If you do not work for the Medical Center, skip to step **12**.
9. Medical Center employees will see **ASPIRE** values next. Review to understand expectations, then click **Next**.
10. If you are not in a clinical career ladder nursing role, skip to step **12**.
11. Medical Center clinical ladder nurses will receive **Clinical Ladder Behaviors** next. Review expectations and then click **Next**.
12. Click **Submit**.
13. Goals will route to the manager for approval. The manager can approve, deny, or request edits to the goals by the employee.
14. Once approved, goals appear in your Employee Profile in the Performance tab and then Individual Goals subtab. Employees can update or edit their goals throughout the performance year. Edits are routed to the manager for approval.

My Cascaded Goals are Missing

If you do not see two cascaded goals in your goal setting task, check with your manager to ensure goals were cascaded. If the manager confirms that they cascaded goals, use the steps in the section below, **I Wrote Goals Already, Why Aren't They in my Template?** to pull the manager's goals into your template. The steps are the same as if you wrote goals in advance of the template and need to pull the goals onto the template. If your manager states they wrote goals but no goals are present, contact AskHR@virginia.edu.

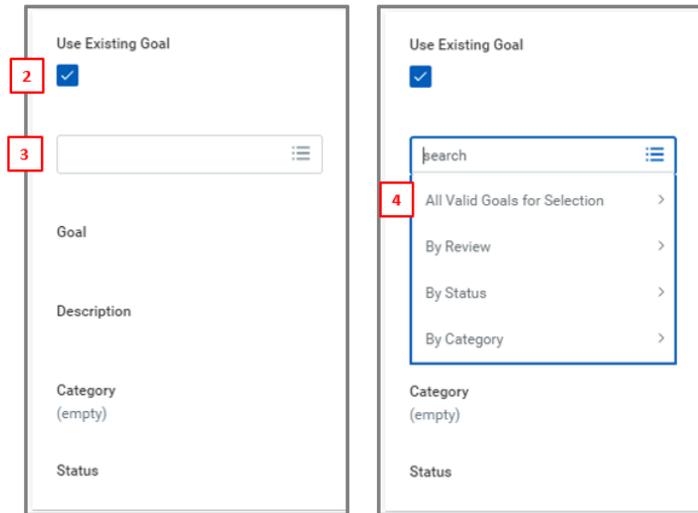
I Wrote Goals Already. Why Aren't They in my Template?

You may have written goals before the template task was sent to your Workday inbox or have goals from a previous year and you want to continue working on the goals. Existing goals can be added to the goal template vs. rewriting the goal.

1. Use the first **5 steps** from the Write Goals from the Inbox Task section to access the goal writing template.

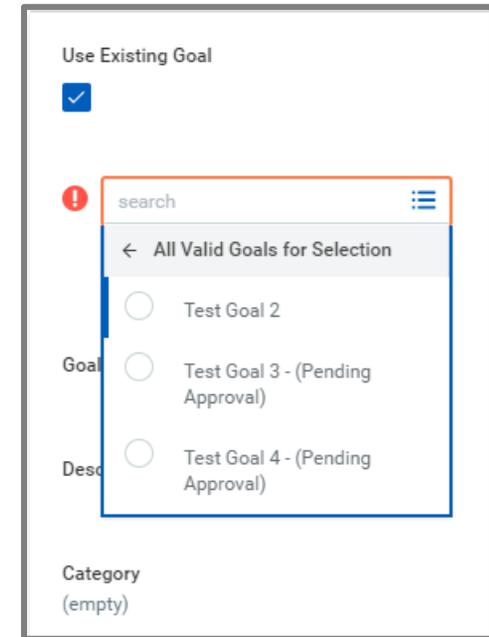
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2. Check the **Use Existing Goal** box.
3. Click in the sub-search field below.
4. Select **All Valid Goals for Selection**.



Screenshot 3: Steps to add an existing goal

5. A list of your existing goals appears. Select the desired goal. Goals not yet approved by the manager will display with **(Pending Approval)**. Pending Approval goals can be selected, and the manager can approve them when you submit your goals.



Screenshot 4: Steps to add an existing goal

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Edit Goals

Goals are accessible during the entire performance year. Some reasons for editing goals include:

- Work priorities have changed, and the goal status should be changed to **No Longer Needed**. When this status is approved by the manager, the goal will not appear on the year-end self-evaluation.
- The work changed slightly, and the description needs to be edited.
- A new priority has emerged, and a new goal must be written.
- The goal was completed, and the employee would like to update the status.

1. Click on your profile photo icon.



2. Click on **View Profile** below your name.

3. Click on **Performance** in the left blue menu. The **Performance** menu opens to the **Goal** tab.

4. Click the  button at the bottom of the page.

5. Click on the goal to be edited. Enter the edits needed in any of the fields. If the goal is inaccessible, skip to the **I Can't Edit my Goals in the Performance Tab!** section in this document.

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Archive Goals

After the end of the performance year, you may want to archive completed goals from the performance appraisal. This will remove the goal from the Active goal list but still allow you to restore them if a goal is needed again. This process keeps a clean list of active goals.

1. Click on your **Profile** icon photo and then **View Profile** below your name.



2. Click on **Performance** in the blue menu.

3. Click on the white **Archived Goals** tab.

4. Click the **Archive Goals** button.

5. Goals that from the most recent performance year and active goals will display.

A. Only goals with an active checkbox in the **Archive** column can be archived.

B. Goals with inactive Archive checkboxes cannot be archived. In example B, the goal was updated by the employee and is in the manager's inbox, **Pending Approval**. The goal cannot be archived.

Archive	Goal	Category	Status
<input type="checkbox"/> ← A	To achieve our goal of improved work/life balance, our team will implement strategies by June 1, 2019 to reduce intrusion into our non-work time. Our metrics goal is to improve our team score on the Press Ganey employee engagement survey statement – "I am able to disconnect from work communications during my free time (emails/phone etc.)" – on the 2019 survey.	Team	Completed
<input type="checkbox"/>	Our goal is to reduce patient morbidity and care costs by reducing CAUTI rates through adherence to standard work, as evidenced by reported quality statistics and documentation in Epic.	Team	Completed
<input type="checkbox"/>	I will attend a UVA sponsored nursing conference or symposium to further my professional development.	Individual	In Progress
<input type="checkbox"/>	I will attend 3 non-mandatory continuing education opportunities this fiscal year.	Individual	Completed
<input type="checkbox"/> ← B	Annual Competencies - (Pending Approval)	Individual	No Longer Needed

Screenshot 6: Archive Goal process area

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- Click **Submit**. The request to archive is routed to the manager for approval. Once approved, archived goals can be found in the **Archived Goals** sub-tab and can be restored by checking the **Restore** checkbox and clicking **OK**.



Restore	Goal	Category	Status
<input type="checkbox"/>	Learning Management System	Individual	Not Started

Screenshot 7: Archived Goal restoration area

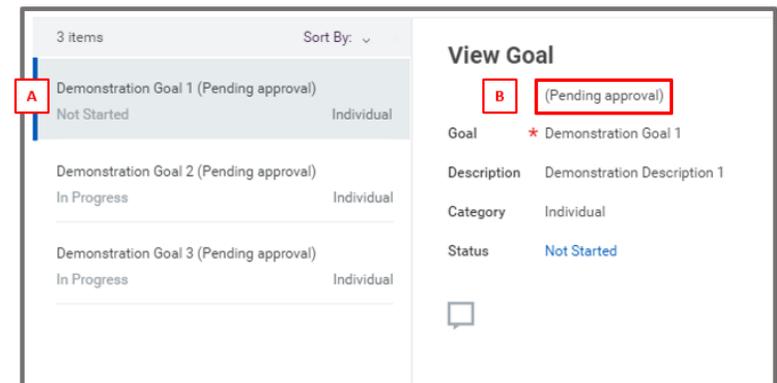
I Can't Edit my Goals in the Performance Tab!

There are two instances where you will not be able to edit goals from the Performance tab.

Manager Did Not Approve – Solution: Contact manager

The manager has not yet approved your most recent submittal of your goals. In this case:

- Navigate to the employee Profile and click on Performance.
- Click on **Edit** at the bottom of the goal page.
 - Click on the goal you wish to edit.
 - Look under the **View Goal** area. If it states **(Pending approval)**, the goal is in the manager's Workday inbox and has not yet been approved.



3 items Sort By: ▾

Demonstration Goal 1 (Pending approval)	Individual
Not Started	
Demonstration Goal 2 (Pending approval)	Individual
In Progress	
Demonstration Goal 3 (Pending approval)	Individual
In Progress	

View Goal

B (Pending approval)

Goal * Demonstration Goal 1

Description Demonstration Description 1

Category Individual

Status Not Started

Screenshot 8: Locked goal view

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Self-evaluation has launched – Solution: Edit in self-evaluation

1. Navigate to the Workday Inbox.
2. Locate the **Complete Self-Evaluation** task.
3. Click on the **Guided Editor** or **Summary Editor** in the task.
4. Click on the goal to be edited and click in the fields to edit.



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Performance Timeline

Oct > Nov > Dec > Jan > Feb > Mar > Apr > May > June > July > Aug > Sept

Manager cascades goals
10/14 – 11/8

HR launches goal templates
11/11

Team member goal writing deadline
12/13

HR launches dual / secondary position goal template
12/15

Manager approves primary role goals by
12/13

Dual / additional job goal writing deadline
1/31

Manager approves additional job goals by
1/31

HR launches self-evaluations
6/1

Self-evaluations due
7/19

Appraisals, conversations and acknowledgements due for managers
8/31

HR Task

MGR Task

Emp Task