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](https://hr.virginia.edu/career-development/performance-management-process/performance-management-resources/goals)

- Cascaded Goals Assigned to You (MC Only)
- Write Goals from the Inbox Task
- My Cascaded Goals are Missing
- I wrote my goals already. Why aren’t they in the template?
- Write Goals at Any Time from the Performance Area

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.

Annual Goal Setting:

The goal setting process helps define your performance within the fiscal year (July 1 to June 30). In collaboration with your manager, you will be evaluated on your ASPIRE values.

Please see the ASPIRE behavioral rating scale [here](#).

For additional resources on the performance management experience, please visit our [website](#).

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.
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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.

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.
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Write Goals at Any Time from the Performance Tab

The goal writing task is assigned at the beginning of the performance year, but goals can be written before or after this occurs.

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 Edit button at the bottom of the page.

5. Click the Add button at the top of the page.

6. Write a title in the Goal field. It is highly recommended that you include the performance year in the title.

7. Write a Description (S.M.A.R.T. help).

8. Typically, the Category is Individual.

9. Select a Status.
   a. Update the status to Completed if you have accomplished the goal. Completed goals appear on the performance appraisal.
   b. The No Longer Needed status, once approved by the manager, will remove the goal from the performance appraisal.
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 Edit 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.

<table>
<thead>
<tr>
<th>Archive</th>
<th>Goal</th>
<th>Category</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>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.</td>
<td>Team</td>
<td>Completed</td>
</tr>
<tr>
<td>[ ]</td>
<td>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.</td>
<td>Team</td>
<td>Completed</td>
</tr>
<tr>
<td>[ ]</td>
<td>I will attend a LVA sponsored nursing conference or symposium to further my professional development.</td>
<td>Individual</td>
<td>In Progress</td>
</tr>
<tr>
<td>[ ]</td>
<td>I will attend 2 non-mandatory continuing education opportunities this fiscal year.</td>
<td>Individual</td>
<td>Completed</td>
</tr>
<tr>
<td>[ ]</td>
<td>Annual Competencies (Pending Approval)</td>
<td>Individual</td>
<td>No Longer Needed</td>
</tr>
</tbody>
</table>

Screenshot 6: Archive Goal process area
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6. 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**.

<table>
<thead>
<tr>
<th>Archived</th>
<th>Goal</th>
<th>Category</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Learning Management System</td>
<td>Individual</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

*Screenshot 7: Archived Goal restoration area*

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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 Approved – Solution: Contact manager**

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

1. Navigate to the employee Profile and click on Performance.
2. Click on **Edit** at the bottom of the goal page.
   
   A. Click on the goal you wish to edit.
   
   B. 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.

*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

Team member goal writing deadline
12/13

Dual / additional job goal writing deadline
1/31

Manager approves primary role goals by
12/13

HR launches goal templates
11/11

HR launches dual / secondary position goal template
12/15

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

Manager approves additional job goals by
1/31

HR Task
MGR Task
Emp Task

Manager approves primary role goals by
12/13

HR Task
MGR Task
Emp Task

The diagram illustrates the performance management timeline, including goal setting, deadlines, and evaluations for team members, managers, and HR tasks.