

Performance: Assigning Goals to your Employees

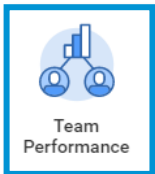
GOALS IN WORKDAY

Before you get started:

- Goals are set **annually**, and each employee is required to have at least **2 goals**.
- Goals must be **aligned with Geisinger's Strategic Plan** and must be linked to a **Strategic Priority Result**.
- Goals entered by employees in Workday **do not require approval**. Leaders must ensure these goals **align with team/department objectives and the employee's responsibilities**.

An employee can enter their individual goals, or a manager can **enter goals for their individual employee or their entire team** in Workday. [Option A](#) outlines the process for assigning goals to **one or more employees**. [Option B](#) outlines how to assign the same goal to an entire team (**Supervisory Organization**).

OPTION A: ADDING A GOAL FOR ONE OR SEVERAL OF YOUR EMPLOYEES



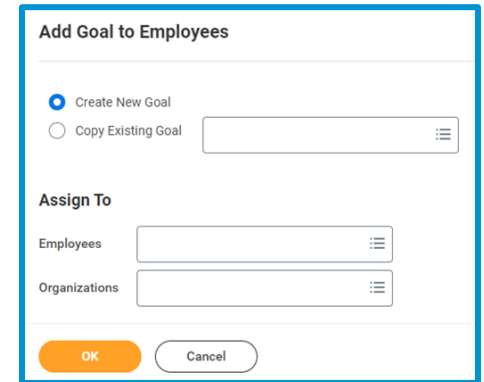
1. Select the **Team Performance** app.
2. From the **Goals & Check-ins** section on the right of the screen, select **Add Goal to Employees**

3. For this step, you can
 - a. Select **Create New Goal** if the goal does not already exist in Workday.
 - b. Select **Copy Existing Goal*** if you want to assign a goal already created by you.



*Note: You **can't copy an "Existing Goal" created before 2025** due to **changes in the goal template**. Attempting to do so will result in an **error message** when you submit the goal.

- i. Select **My Goals** and check the box next to the goal you want to assign.
- ii. **Do not use My Organization's Individual Goals, My Organization Goals or Goals by Category**, if available.

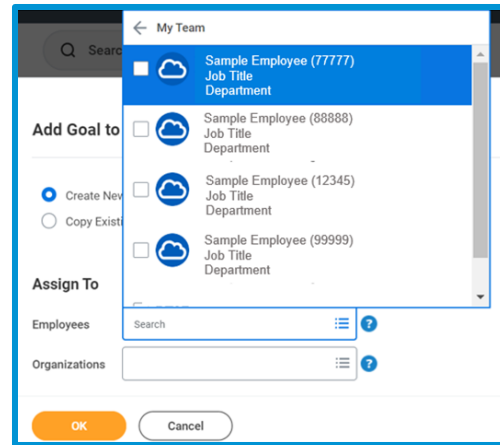



The screenshot shows a modal window titled "Add Goal to Employees". It has two radio buttons: "Create New Goal" (which is selected) and "Copy Existing Goal". To the right of the "Copy Existing Goal" option is a search field with a list icon. Below these are two input fields labeled "Assign To", with "Employees" and "Organizations" as sub-labels. At the bottom are "OK" and "Cancel" buttons.

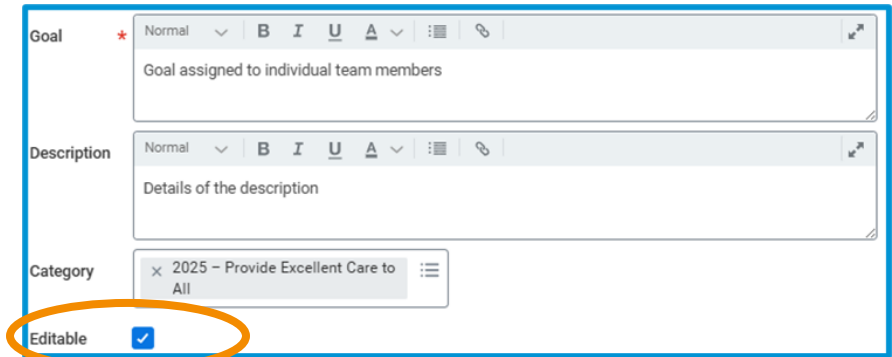
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2. To assign a goal to **specific team members**, use the “**Employees**” option in the “**Assign To**” section. Select “**My Team**” from the drop-down menu and check the box next to the employee’s name(s). **Don’t enter information in the Organizations section.**

3. Click **OK**.



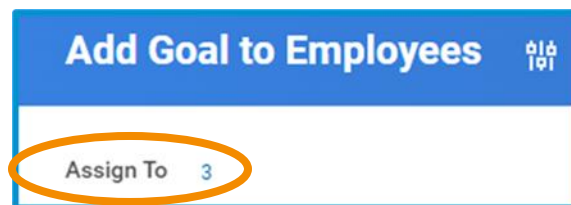
4. If you used **Copy Existing Goal**, the fields will pre-populate. If not, enter the required information in the goal template. To assist you with the process, refer to the Smart Tips .



Note: At the top of the next screen, the “**Assign To**” section shows the **number of employees** assigned the goal. Confirm this number is accurate before proceeding, as assigned goals cannot be retracted.



Note: When creating the goal, if **Editable** is checked, this allows your employee to make changes to the goal after you Submit it.



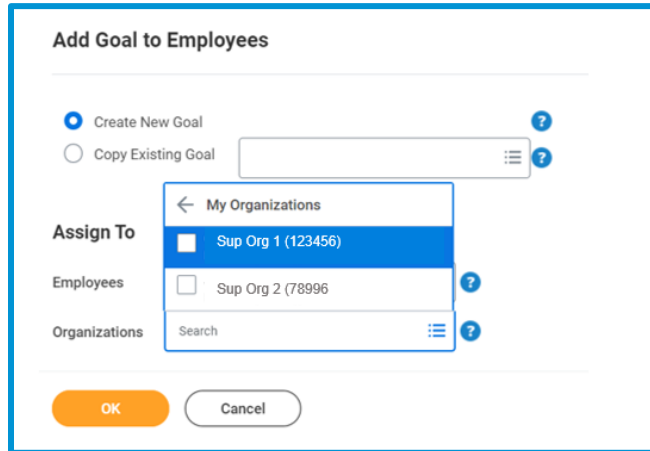
5. If you want to add additional goals for the **same employee(s)**, click **Add** to create additional goal(s).
6. Once completed adding goals, click **Submit** and the goals will be assigned to the respective employee’s Individual Goals section.

OPTION B: ADDING A GOAL FOR YOUR ENTIRE TEAM

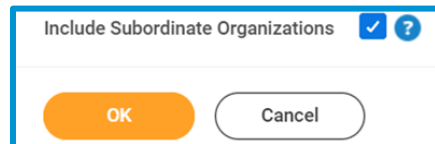
1. Follow Steps 1-3 in the above section.
2. To assign the goal to the **entire team**, go to the “**Assign To**”

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section. From the “**Organizations**” drop-down menu, select “**My Organizations**” and check the box next to your appropriate Supervisory Organization (team). To search for your assigned supervisory organizations, type your last name in the search bar. *Do not enter information in the Employees section.*

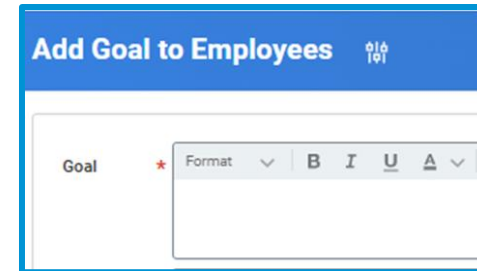



3. After filling in the Organizations section, you'll see the option to “**Include Subordinate Organizations.**” Selecting this option will assign the goal to your indirect reports (employees who report to your supervisors) as well as your direct reports.



Note: At the top of the next screen, the “Assign To” area shows the number of employees assigned the goal. If this number does not appear, it means your supervisory organization (and any subordinate

organizations, if selected) has 100 or more employees. Before proceeding, confirm you are assigning the goal to the correct group(s). Refer to [this](#) section for additional details on how to confirm the number of employees associated with your supervisory organization.



4. When ready to move forward, select **OK**
5. If you used **Copy Existing Goal***, the goal fields will pre-populate. If not, enter the required information in the goal template. To assist you with the process, refer to Smart Tips 



*Note: You are **unable to copy** an “Existing Goal” if the goal was **created prior to 2025** due to the change in the goal template. If you do, an error message occurs when you Submit the goal.

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Note: When creating the goal, if **Editable** is checked, this allows your employee to make changes to the goal after you Submit it.

- If you want to add additional goals for the **same Supervisory Organization (team)** click **Add** to create additional goal(s).
- Once completed adding goals, click **Submit** and the goals will be assigned to the respective team members' Individual Goals section.

The screenshot shows a form for creating a goal. It has fields for Goal, Description, Category, and Supports. The 'Editable' checkbox at the bottom is checked and circled in orange.

“ASSIGN TO” INFORMATION MISSING

If the “Assign To” information is “missing,” which indicates you are assigning the goal to 100+ employees and you want to **confirm the number of employees in a specific supervisory organization**, you can generate the following report prior to assigning the goal:

Running the Report

Type RPT – Worker in the Workday Search bar and select **RPT-Worker Listing**.

The screenshot shows a search bar with 'RPT - Worker' entered. Below the search bar, two results are listed: 'RPT - Worker History Report' and 'RPT - Worker Listing Report'. The 'RPT - Worker Listing Report' is selected.

Prompts

The screenshot shows the 'RPT - Worker Listing' form. It has fields for Effective as of Date, Organizations, Include Subordinate Organizations, Institute, Service Line, Company, Cost Center, Job Family Group, Job Family, Job Profile, Management Level, Location, and Worker. Three orange circles with numbers 1, 2, and 3 are placed over the form: 1 is over the Effective as of Date field, 2 is over the Organizations field, and 3 is over the Include Subordinate Organizations checkbox.

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- 1 Effective Date:** Utilize the date you are generating the report.
- 2 Organizations:** Choose the **supervisory organization*** that will be assigned the goal to confirm the employees associated with the respective organization. You can find your assigned supervisory organizations by typing the leader's last name in the search bar.
- 3 Include Subordinate Organizations:** Check this box if you plan to assign the goal to your direct and indirect reports. This will show all individuals that rollup to the supervisory organization.

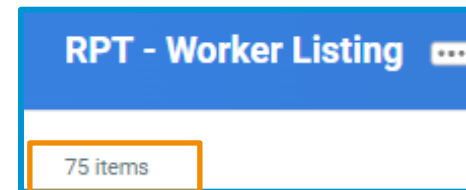
Once all prompts are selected, click **OK**.

Reviewing the Data

Table

A table provides a listing of the employees associated with the supervisory organization you selected. If you selected **Include Subordinate Organizations**, it will also include the supervisory organizations that report up to the leader.

At the top of the report, it will include the number of employees within the Supervisory Organization.



***Supervisory Organizations** represent the reporting hierarchical structure in Workday. Each manager has two supervisory organizations – one for each type of staffing model. For more information, view [this](#) job aid.

RPT - Worker Listing										
75 items										
Employee ID	Last Name	First Name	Worker Status	Worker Type	Worker Subtype	Email Address	Work Phone Number	Internal Mail Code	Direct Supervisor	Indirect Supervisor
99999	Employee	Fake	Active	Employee	Regular	fake@geisinger.edu	(570) 123-4567	XX-XX	Fake Manager	Sup Mrg
01010	Employee	John	Active	Employee	Regular	jemployee@geisinger.edu	(570) 456-7891	WFH	Jane Manager	Fake Mgr