

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 and Key Result**.
- Goals entered by employees in Workday **do not require approval**. Leaders are required to make sure your **employee's goals are aligned with your team/department goals** and the employee's **areas of responsibility**.

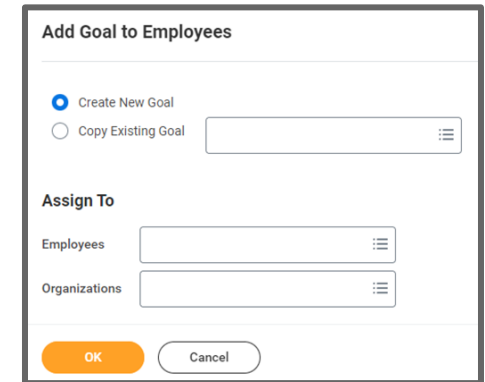
An employee can enter their individual goals, or a manager can **enter goals for their individual employee or their entire team** in Workday. [Option A](#) outlines the process for assigning goals to **one or more employees**. [Option B](#) outlines how to assign the **same goal to an entire team (Supervisory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

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

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

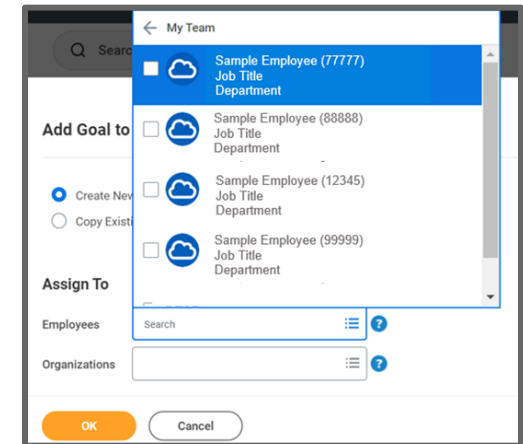
2. For this step, you can:

- 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.



- 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.

3. Since you are assigning the goal to one of several team members and not the entire team, use **Employees** in the **Assign To** section. From the drop-down menu, select **My Team** and check the box next to the employee's name(s) who will be assigned the goal. **Do not enter information in the Organizations section.**

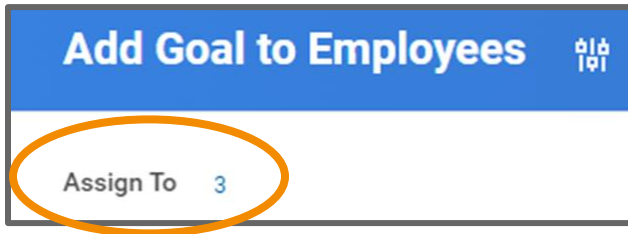


4. Click **OK**.

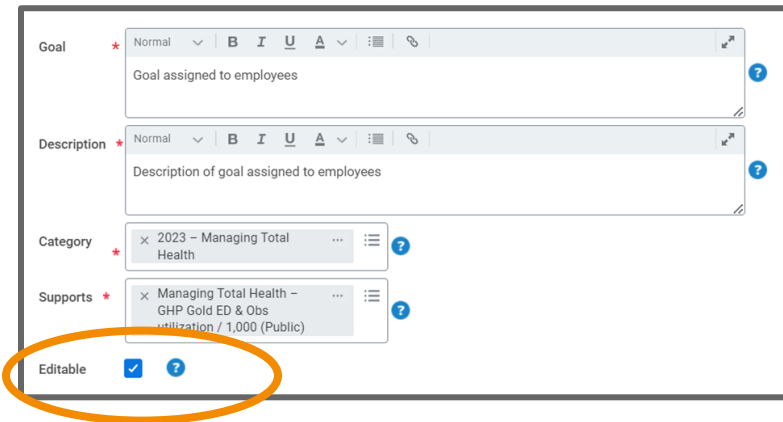
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Note: At the top of the next screen, the **Assign To** identifies the **number of employees** who will be **assigned the goal**. Before moving forward, **confirm this number is accurate** because you are **unable to retract assigned goals**.



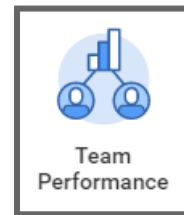
5. If you used **Copy Existing Goal**, the goal fields will pre-populate. If not, enter the required information in the goal template. To assist you with the process, refer to the Smart Tips



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

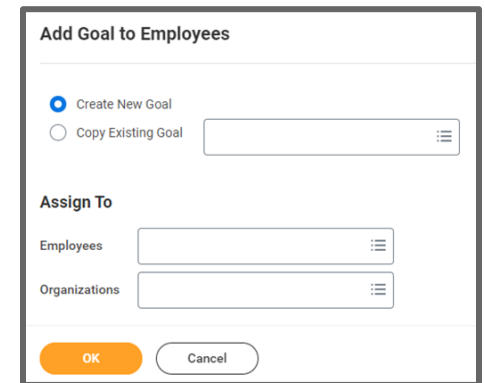
6. If you want to add additional goals for the **same employee(s)**, click **Add** to create additional goal(s).
7. Once completed adding goals, click **Submit** and the goals will be assigned to the respective employee's Individual Goals section.

OPTION B: ADDING A GOAL FOR YOUR ENTIRE TEAM



1. Select the **Team Performance** application.
2. From the **Goals & Check-ins** section on the right of the screen, select **Add Goal to Employees**
3. For this step, you can:

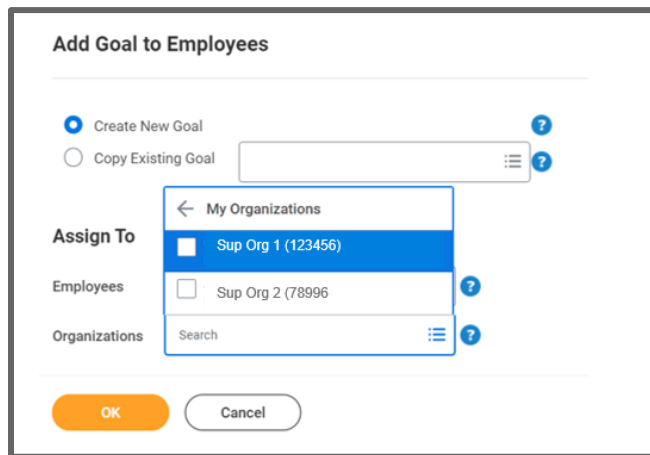
- a. Select **Create New Goal** if the goal does not already exist in Workday.
- b. Select **Copy Existing Goal** if you want to assign a goal already created by you.
 - i. Select **My Goals** and check the box next to the goal



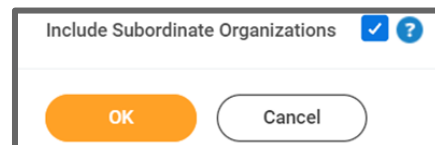
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you want to assign.

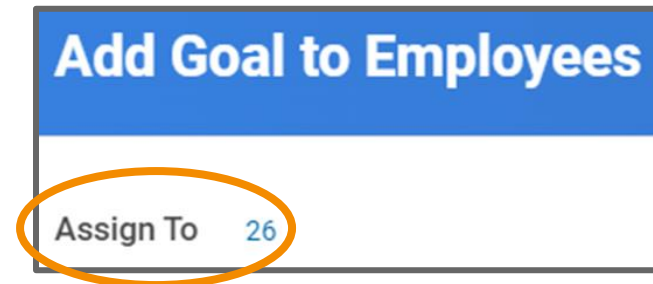
- ii. **Do not use My Organization's Individual Goals, My Organization Goals or Goals by Category**, if available.
4. Since you are assigning this goal to the entire team, in the **Assign To** section, from the **Organizations** drop-down menu, select **My Organizations** and check the box next to Supervisory Organization (team) who will be assigned the goal. You can find your assigned supervisory organizations by typing your last name in the search bar.
5. *Do not enter information in the Employees section.*




6. Once you populate the Organizations section, the option to Include Subordinate Organizations appears. If you select this option, the goal will also be assigned to your indirect reports (those who report to your supervisors)



Note: At the top of the next screen, the **Assign To** area identifies the **number of employees** who will be **assigned the goal**. If the **Assign To Number does not appear**, your supervisory organization (and subordinate organizations, if checked) has 100 or more employees. Before moving forward, you should 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.



7. When ready to move forward, select **OK**
8. 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 the Smart Tips 

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Goal: Normal, Bold, Italic, Underline, Text Color, List, Link, Help icons. Goal assigned to employees

Description: Normal, Bold, Italic, Underline, Text Color, List, Link, Help icons. Description of goal assigned to employees

Category: 2023 - Managing Total Health

Supports: Managing Total Health - GHP Gold ED & Obs utilization / 1,000 (Public)

Editable: ?



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.

“ASSIGN TO” INFORMATION MISSING

If the Assign To information is “missing,” which indicates your are assigning the goal to 100+ employees and you want to **confirm the number of employees in 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**.

Search: RPT - Worker

- RPT - Worker History Report
- RPT - Worker Listing Report

Prompts

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY (1)

Organizations: * (2)

Include Subordinate Organizations: (3)

Institute: [dropdown]

Service Line: [dropdown]

Company: [dropdown]

Cost Center: [dropdown]

Job Family Group: [dropdown]

Job Family: [dropdown]

Job Profile: [dropdown]

Management Level: [dropdown]

Location: [dropdown]

Worker: [dropdown]

OK Cancel

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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 roll up to the supervisory organization.

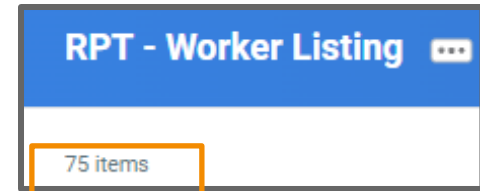
Once all prompts are selected, click **OK**.

Reviewing the Data

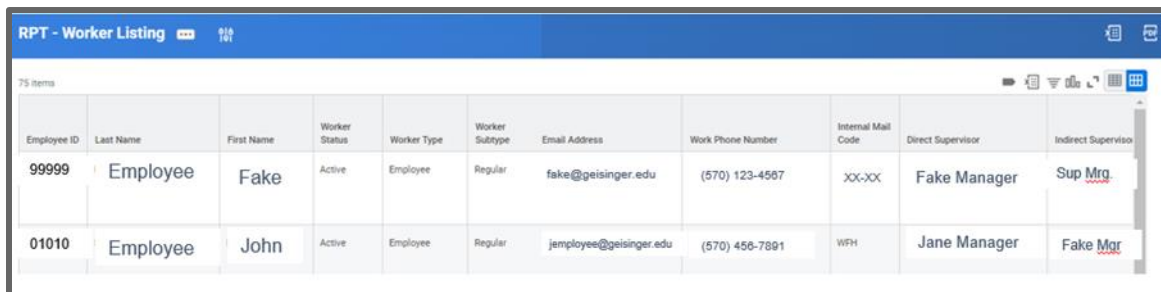
Table

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.

A screenshot of a table titled "RPT - Worker Listing" with 75 items. The table has columns for Employee ID, Last Name, First Name, Worker Status, Worker Type, Worker Subtype, Email Address, Work Phone Number, Internal Mail Code, Direct Supervisor, and Indirect Supervisor. Two rows are visible: one for Employee ID 99999 (Employee Fake) and one for Employee ID 01010 (Employee John).

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