

# How to Cascade Goals in Workday

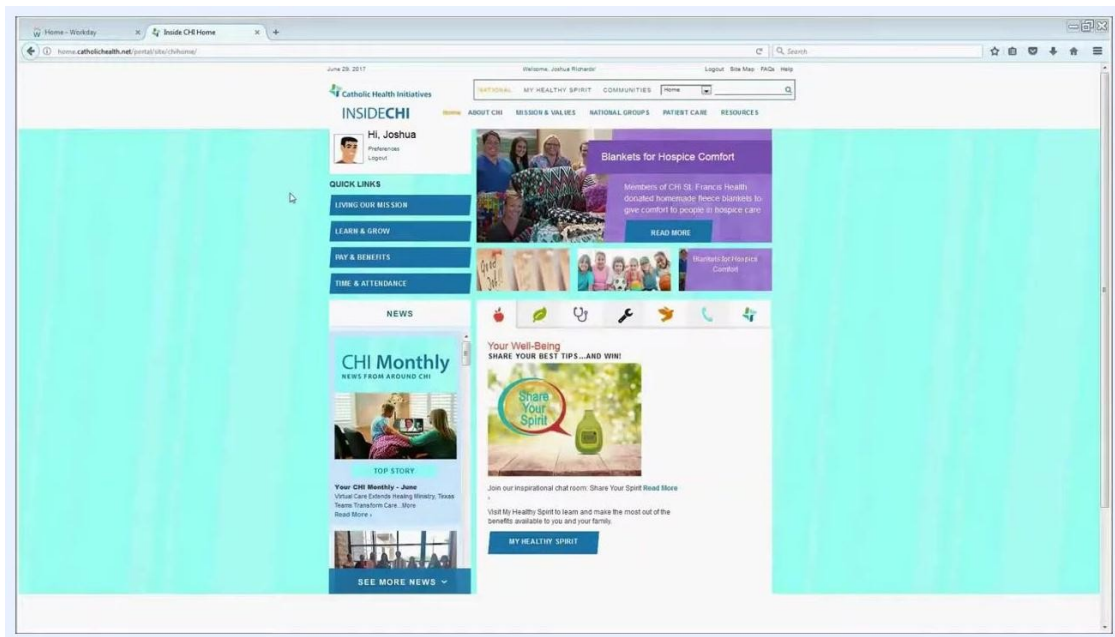
Cascading goals in Workday allows managers to assign a goal to multiple employees at once, ensuring alignment across teams and organizations. This guide walks you through how to cascade goals in Workday, from accessing the system to submitting the finalized goal to your team.

## Prerequisites

- Access to Workday through the Inside CHI intranet.
- Appropriate permissions to cascade goals to your team or organization.
- A finalized goal, since cascaded goals cannot be edited or deleted in bulk after submission.

## Step 1: Access Workday from Inside CHI

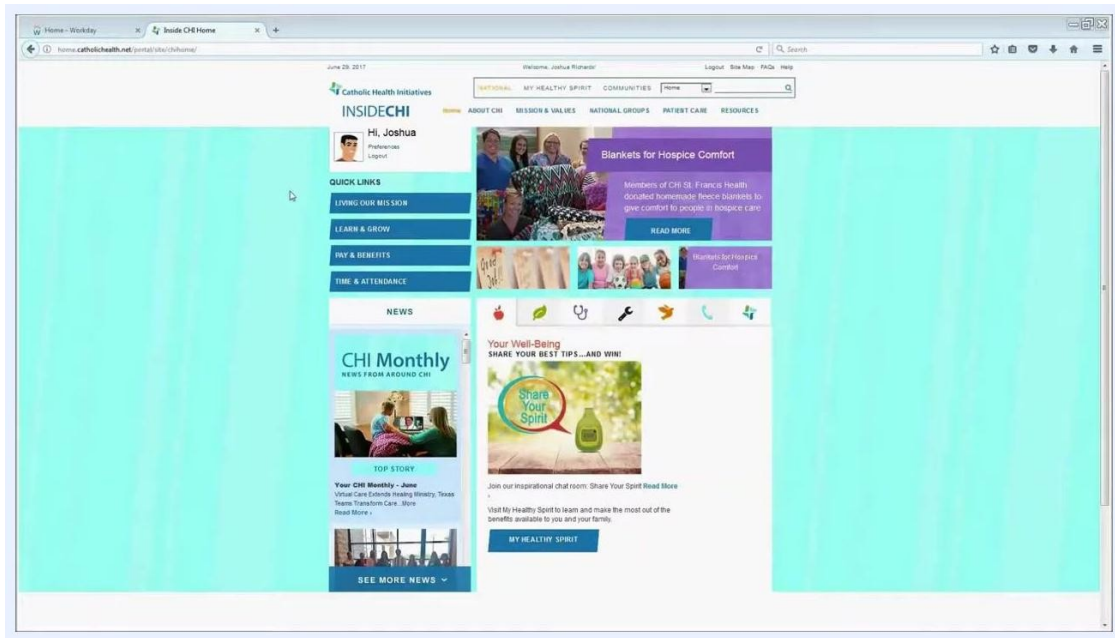
On the CHI intranet homepage, locate the **Quick Links** section on the left side of the screen. Click either **Learn & Grow** or **Pay & Benefits** to access Workday.



CHI intranet homepage showing Quick Links, including Learn & Grow and Pay & Benefits

## Step 2: Navigate to the Team Performance worklet

Once inside Workday, you will see a dashboard with several circular icons, known as worklets. Locate and select the **Team Performance** worklet, identified by an icon showing a bar chart and three people.



Workday dashboard displaying multiple worklets, with Team Performance highlighted

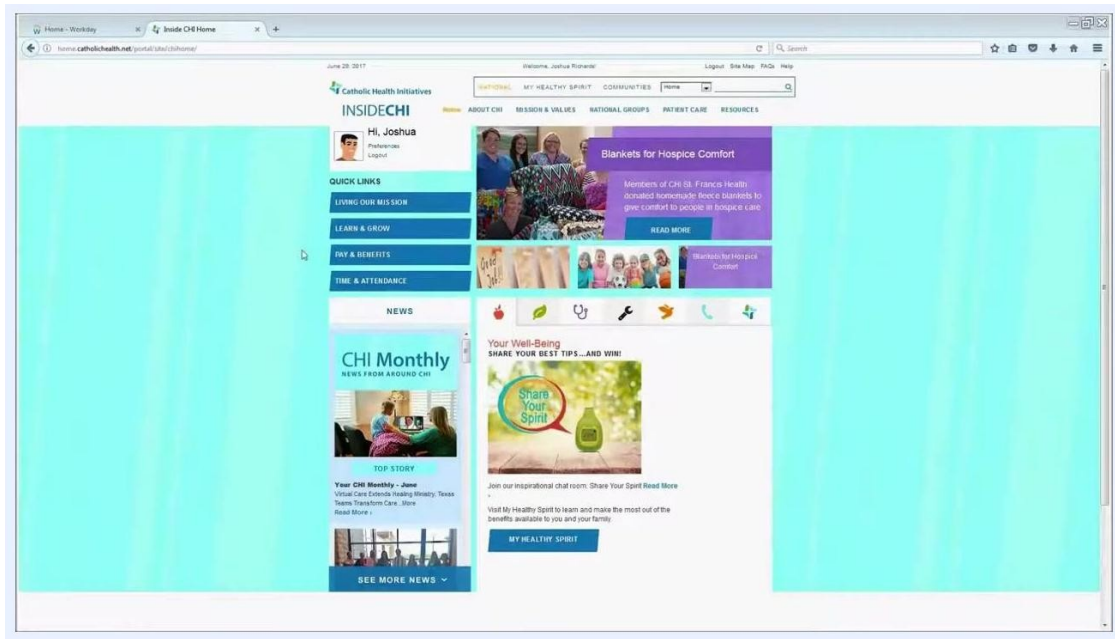
## Step 3: Review the goal cascading guidance

On the **Add Goal to Employees** page, review the help text at the top of the screen. This section includes hyperlinks to job aids and resources for additional guidance, along with a reminder that you can cascade goals to large groups depending on your permissions.

Note the following before proceeding:

- You cannot edit or delete a cascaded goal en masse. Any changes must be made individually by each employee, or by you one employee at a time.

- Make sure your goal is finalized before cascading it.



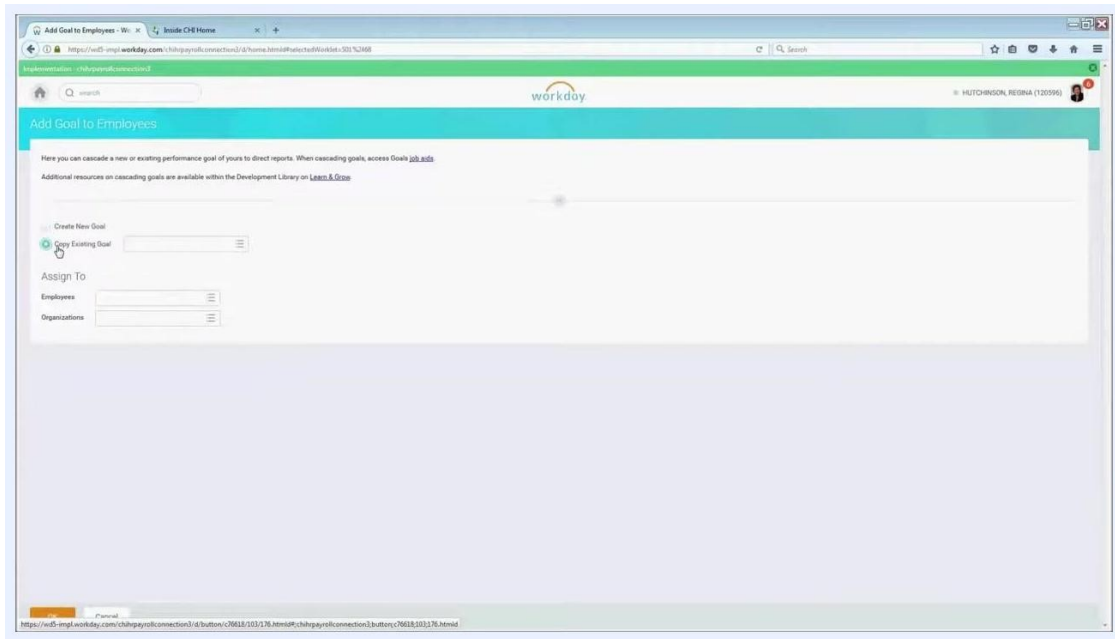
Add Goal to Employees page displaying help text with links to job aids and resources

## Step 4: Choose how to cascade the goal

On the **Add Goal to Employees** page, select one of the following options:

- **Create New Goal:** Enter the details for a new goal you want to cascade.

- **Copy Existing Goal:** Choose an existing goal to cascade to your team.



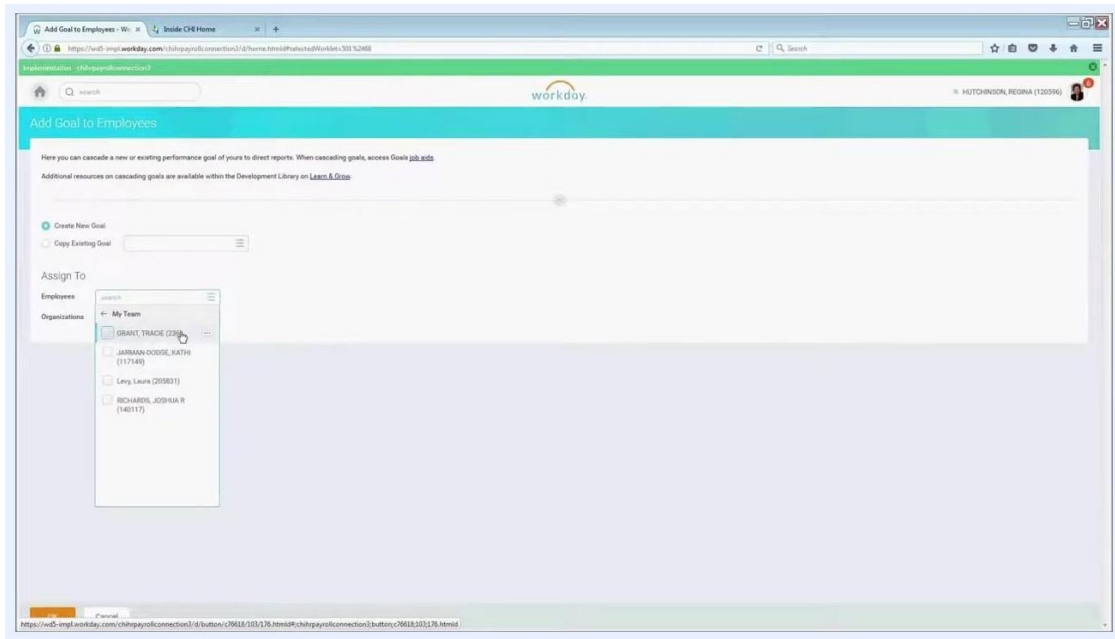
**Add Goal to Employees page with the Copy Existing Goal option selected**

## **Step 5: Assign the goal to employees**

Under the **Assign To** section, click the **Employees** field. A dropdown list of your team members appears, where you can:

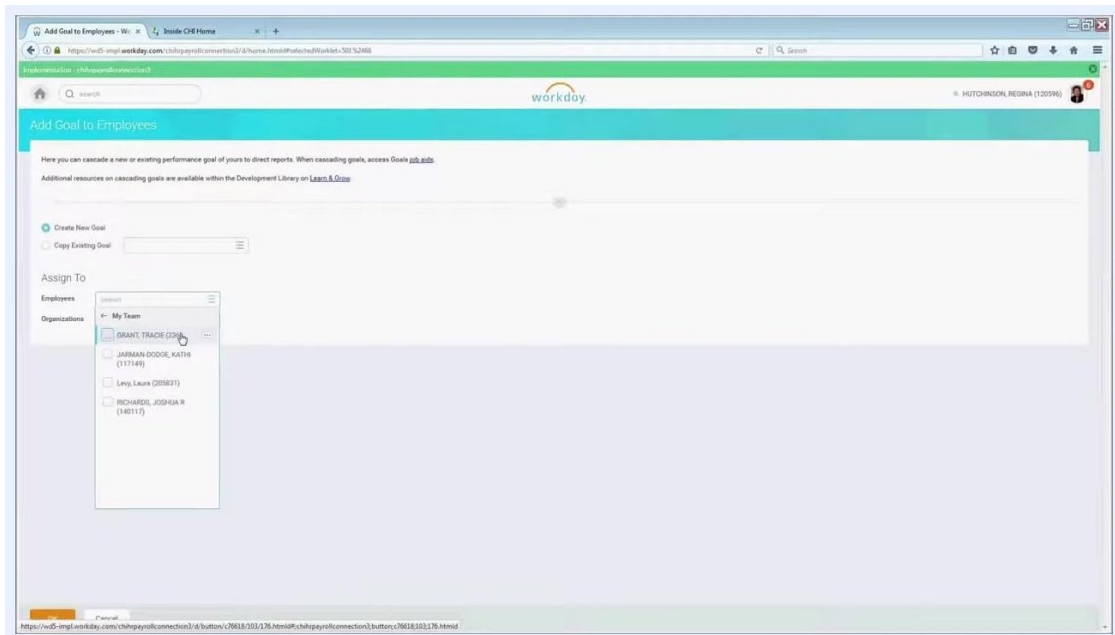
- Select individual employees by clicking the checkbox next to their names.

- For larger teams, press **Ctrl + A** to select all employees at once.



**Assign To Employees dropdown open, displaying team members with selection checkboxes**

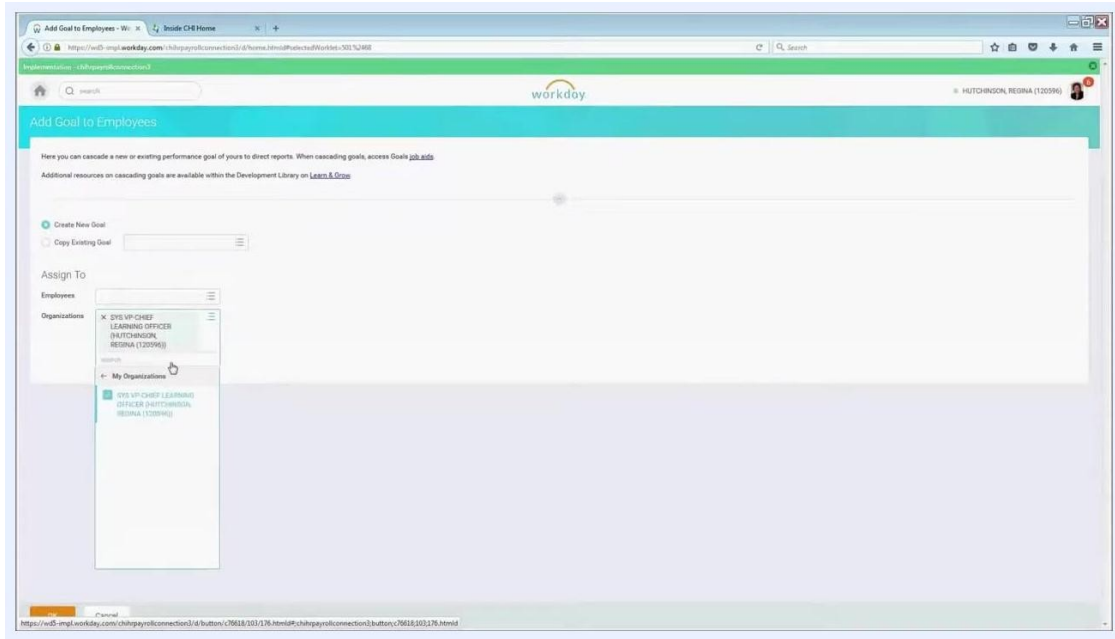
After selecting employees individually, confirm that the blue line indicator is illuminated next to each selected name in the dropdown. This visual cue confirms the employees have been successfully selected.



**Assign To Employees dropdown showing selected employees highlighted in blue**

## Step 6: Assign the goal by organization (alternative method)

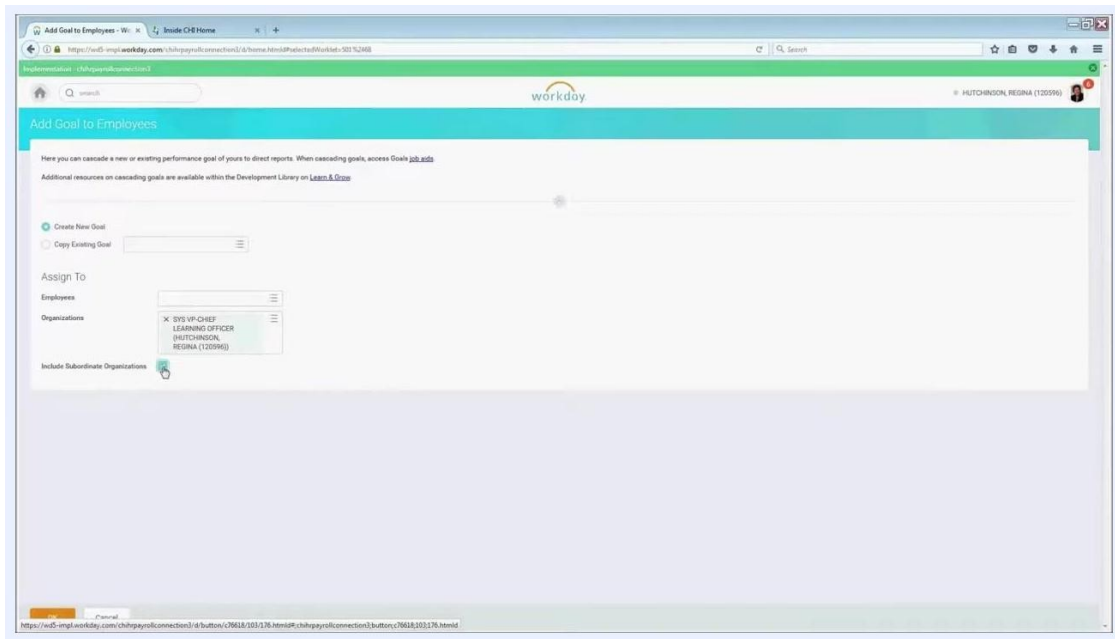
If you prefer not to select employees individually, use the **Organizations** section instead. Click the **Organizations** field under **Assign To**, then select **My Organization**.



Organizations dropdown open with My Organization selected

## Step 7: Include subordinate organizations

If your organization includes multiple layers and you want the goal to reach employees who report up through your organization—not just your direct reports—check the box labeled **Include Subordinate Organizations**. This ensures the goal cascades to all employees within your organization and its sub-units.



**Include Subordinate Organizations** checkbox highlighted under the **Organizations** selection

## Step 8: Enter the goal details

Once you have selected the appropriate employees or organizations, click **OK** at the bottom of the page. The system displays the number of individuals the goal will be assigned to (for example, "Assign To: 23").

Enter the goal details as you would for your own goals:

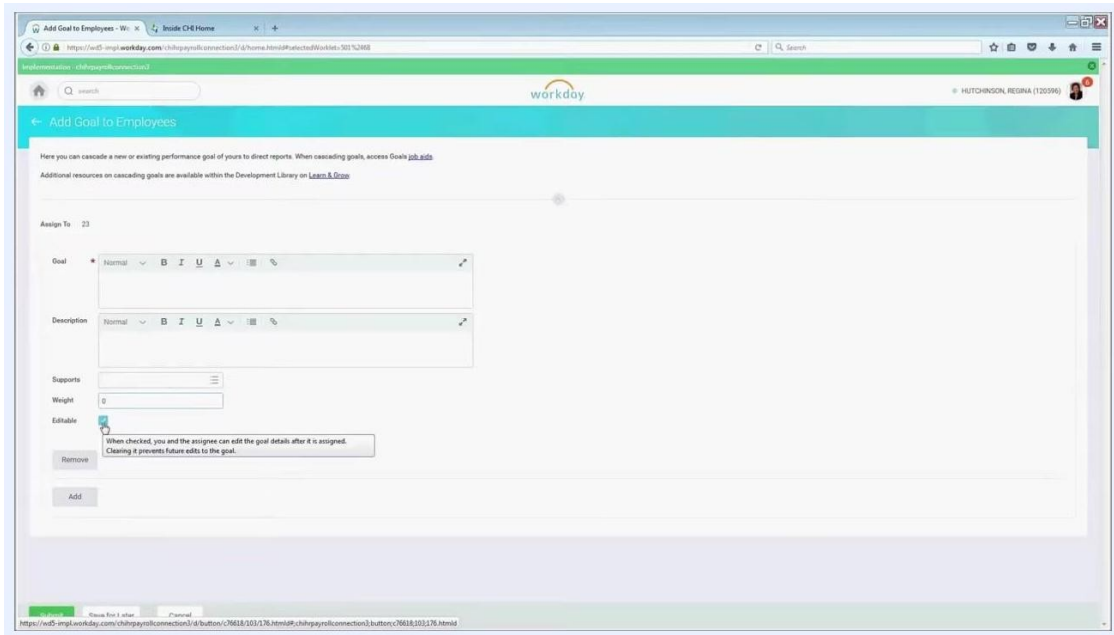
- **Goal:** Enter the goal title, or select one from the available options.
- **Description:** Provide a detailed description of the goal.
- **Supports:** Select the "Living Our Mission" measure that this goal supports from the dropdown.
- **Weight:** Enter the weight for the goal (for example, 0, or update as needed).

- **Editable:** Make sure this checkbox is checked so employees can adjust the weighting and update the description to fit their specific roles.

The screenshot shows the 'Add Goal to Employees' form in the Workday system. The form is titled 'Add Goal to Employees' and includes a sub-header: 'Here you can cascade a new or existing performance goal of yours to direct reports. When cascading goals, access Goals [job aids](#). Additional resources on cascading goals are available within the Development Library on [Learn & Grow](#).' Below this, there is a section for 'Assign To' with a dropdown menu showing '23'. The main form area contains several fields: 'Goal' (a text area with a dropdown menu set to 'Normal'), 'Description' (a text area with a dropdown menu set to 'Form'), 'Supports' (a dropdown menu), 'Weight' (a text input field), and 'Editable' (a checkbox that is checked). There are 'Remove' and 'Add' buttons at the bottom of the form. The Workday logo is visible in the top right corner, and the user's name 'HUTCHINSON, RESINA (120396)' is displayed in the top right corner of the page.

**Add Goal to Employees form showing fields for Goal, Description, Supports, Weight, and the Editable checkbox**

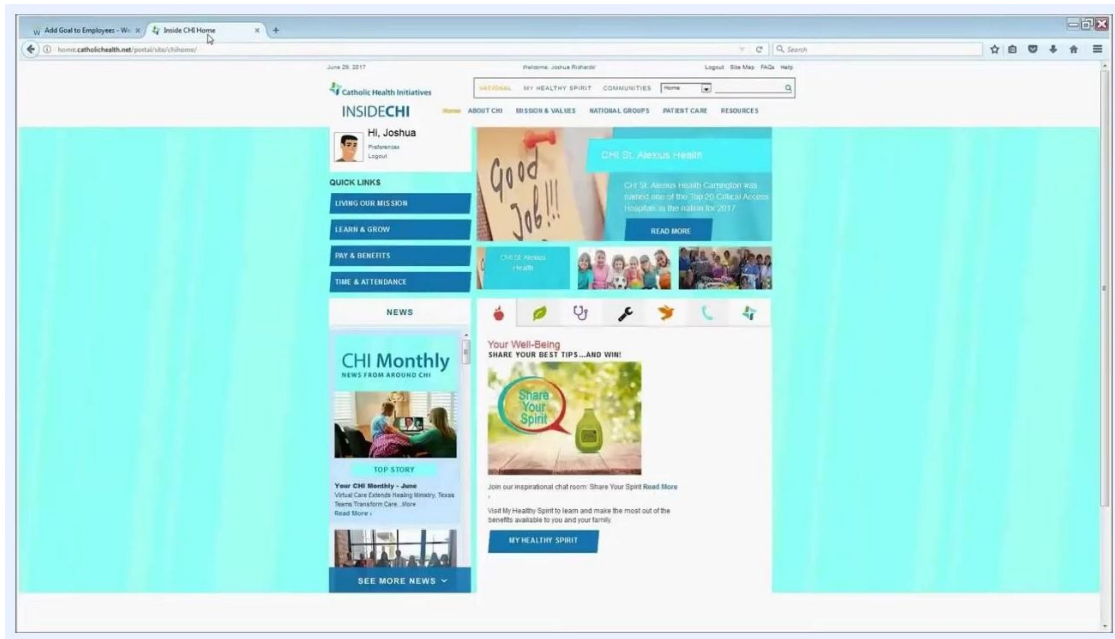
It is highly recommended to keep the **Editable** option enabled. This allows employees who receive the cascaded goal to change the weighting and update the description to better match their role in achieving the goal.



**Tooltip explaining the function of the Editable checkbox**

## Step 9: Add the goal to employees

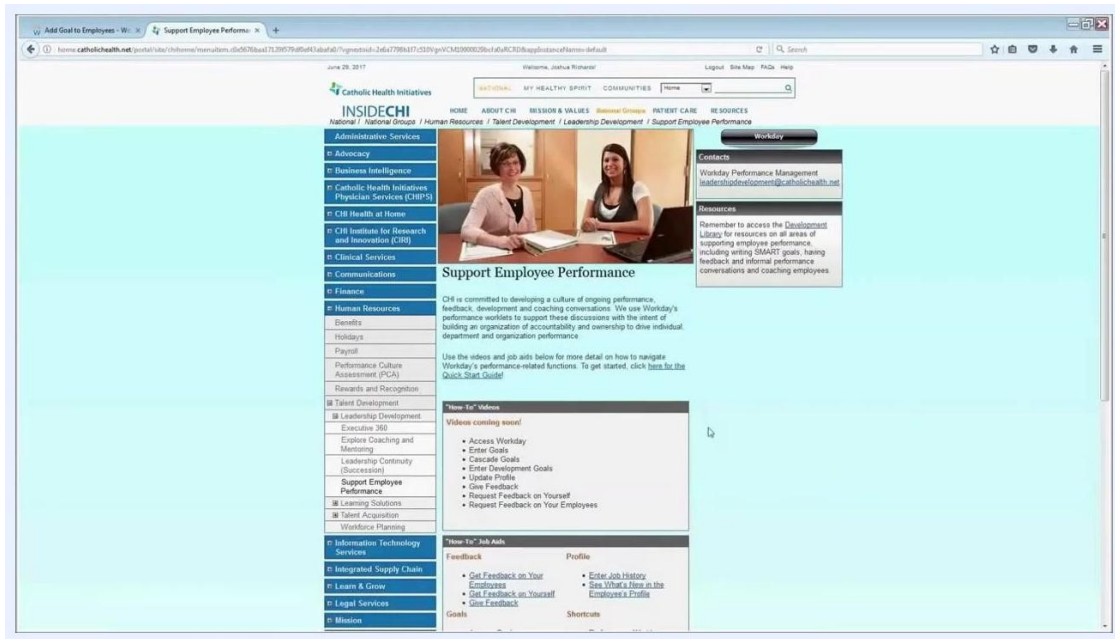
After entering all required goal information—Goal, Description, Supports, Weight, and Editable—click the **Add** button at the bottom of the form. Confirm that the "Assign To" count reflects the correct number of recipients (for example, 23).



Add Goal to Employees screen with the Add button highlighted, showing all goal fields and the Assign To count

## Step 10: Submit the cascaded goal

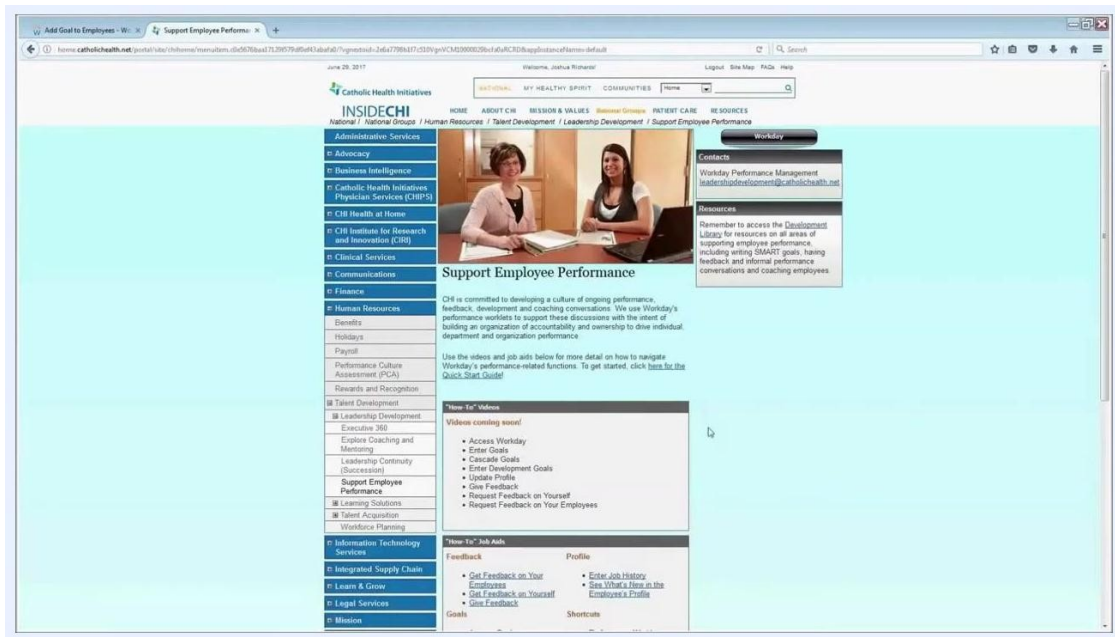
Once you have finished adding all goals for your employees, click the **Submit** button at the bottom of the page to finalize and assign the goals. Review all information carefully before submitting, since this action distributes the goals to the selected employees or organizations.



Add Goal to Employees screen with the Submit button visible, ready for final submission

## Step 11: Access additional goal-setting resources

For further guidance on setting goals and using Workday, navigate to the **Support Employee Performance** page, accessible from the **Learn & Grow** section on the Inside CHI portal. Use the **Learn & Grow** quick link on the Inside CHI home page to find relevant training materials, job aids, and support documents.



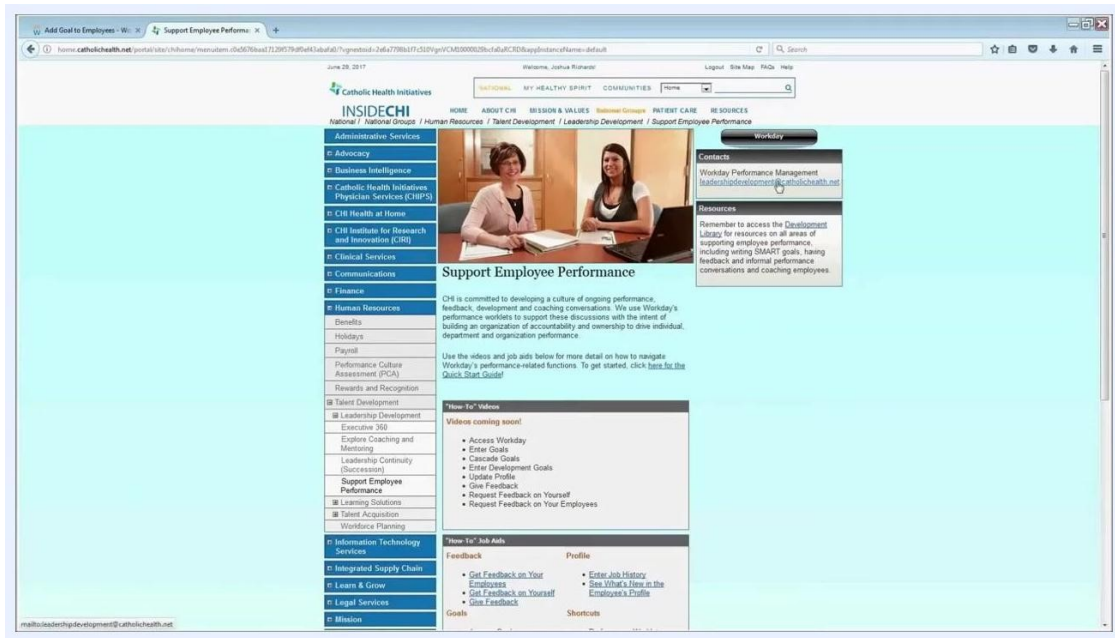
Inside CHI home portal showing quick links, including Learn & Grow, Living Our Mission, Pay & Benefits, and Time & Attendance

On the **Support Employee Performance** page, you will find:

- Contact information for Workday Performance Management support (leadershipdevelopment@catholichealth.net).
- Links to the Development Library for resources on writing SMART goals, providing feedback, and coaching employees.
- "How-To" videos and job aids covering common performance management tasks, such as accessing Workday, entering goals, cascading goals, updating your profile, and providing feedback.

## Step 12: Contact support for additional help

If you have questions or need further assistance, contact your HR business partner or email the Workday Performance Management team at [leadershipdevelopment@catholichealth.net](mailto:leadershipdevelopment@catholichealth.net).



Support Employee Performance page with the contact email highlighted and resource links visible

## Summary

Cascading goals in Workday allows you to efficiently assign objectives to your team while maintaining accuracy and alignment with organizational processes. Before submitting, always double-check your goal details and employee selection, since bulk edits or deletions are not possible once a goal has been cascaded. Making goals editable empowers employees to personalize their objectives for greater engagement. If you need further support, the Support Employee Performance page and your HR business partner are available to help.