



**Performance Management: Employee User Guide
Populating Your Self Assessment, Development
and Performance Objectives**

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Populating Your Self Assessment, Development and Performance Objectives

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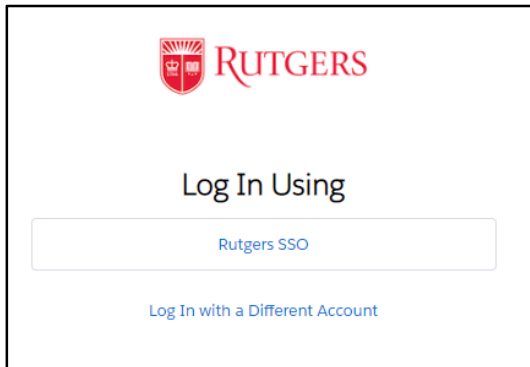
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Log in: Use Chrome or Firefox browsers only



2 <https://rutgerstalent.force.com/>

Use your Rutgers NetID and Password

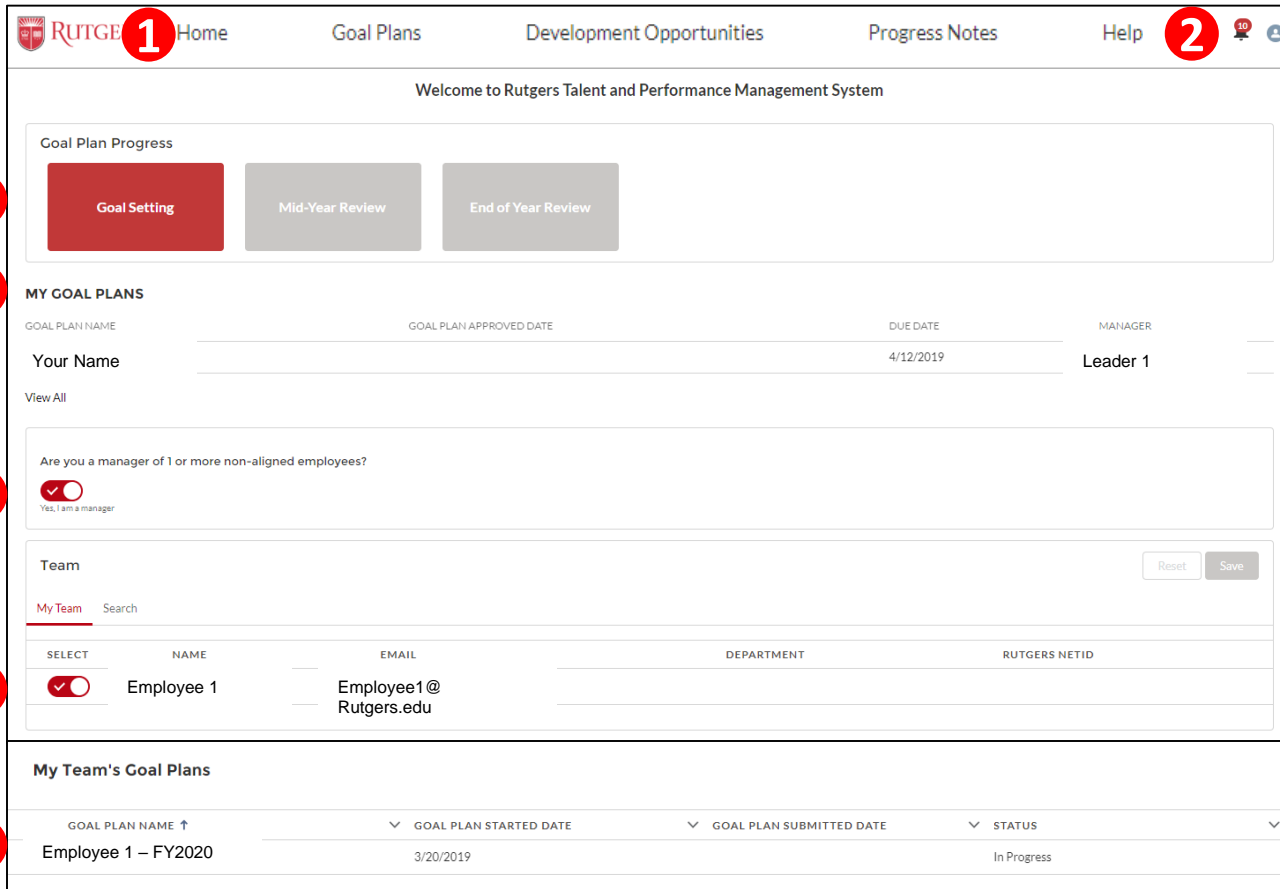


#	Process
1.	Launch either Chrome, Safari or Firefox browser Do not use Internet Explorer
2.	Type in the address field: https://rutgerstalent.force.com/
3.	Set your default browser to Safari, Chrome or Firefox to receive system notifications

Important!

3 Set your default browser to Safari, Chrome or Firefox to receive notifications.

Homepage: Navigating the Homepage Functions

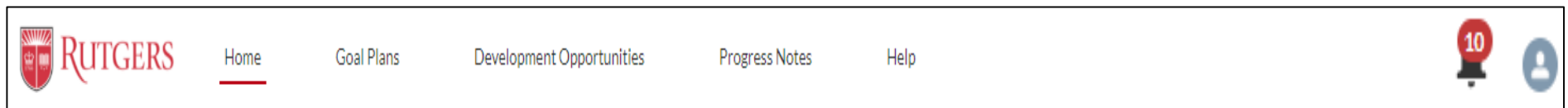


The screenshot shows the homepage of the Rutgers Talent and Performance Management System. It features a navigation bar with links for Home, Goal Plans, Development Opportunities, Progress Notes, and Help. The main content area includes a 'Goal Plan Progress' section with buttons for Goal Setting, Mid-Year Review, and End of Year Review. Below this is a 'MY GOAL PLANS' table with columns for Goal Plan Name, Approved Date, Due Date, and Manager. A 'Team' section allows users to manage their team members, and a 'My Team's Goal Plans' table shows goal plans for the user's team.

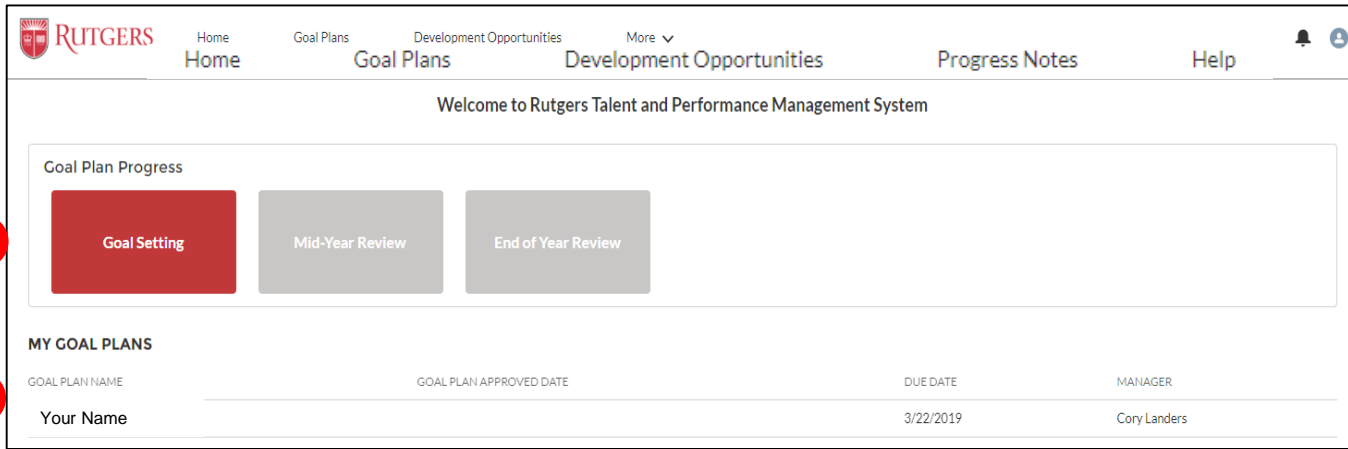
#	Functions
1.	Global navigation: Home: Access to the Homepage Goal Plans: Access yours and your employees Goal Plan Development Opportunities: Search and launch Development Opportunities Progress Notes: Create and review Progress Notes Help: Access Help, documentation and videos
2.	Messages and Notifications
3.	Access Your Goal Plan phase: Goal Setting Mid-Year Review End-of-Year Review
4.	My Goal Plan: Access Your Goal Plan
5.	Manager Self Selection: Self select to access Manager functions
6.	Team: Add employees to your team
7.	My Teams Goal Plans: Access your team's Goal Plan(s)

Accepting Your Managers Request to Add You to their Team

- 1** From your email box – notification from –
Click the provided URL
Rutgers Shibboleth login will appear
Enter your NetID and Password
When the page opens, click Approve.
- 2** Or log in -
On the Home page notice the notification bell upper right corner,
Click to access the notification about joining the team
Click to accept.



Goal Setting: Accessing Your Goal Plan

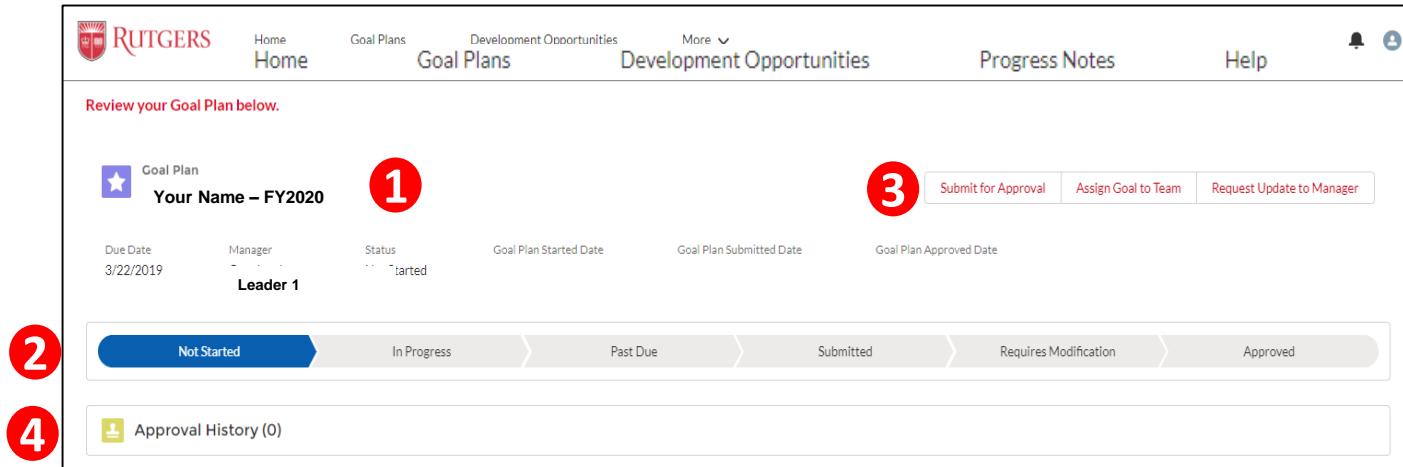


#	Process
1.	Access your goal plan by clicking the red Goal Setting icon
2.	Or, access your Goal Plan by clicking your name in the My Goal Plans section

Goal Setting starts with the Manager

However, establishing your Goal Plan is the same for both Manager and Employee.

Goal Setting: Navigating Your Goal Plan



The screenshot shows the Rutgers Goal Plan interface. At the top, there is a navigation bar with 'Home', 'Goal Plans', 'Development Opportunities', 'Progress Notes', and 'Help'. Below this, a message says 'Review your Goal Plan below.' The main content area displays a goal plan for 'Your Name - FY2020' with a star icon. A red circle with the number '1' points to the star icon. To the right of the goal plan title are three buttons: 'Submit for Approval', 'Assign Goal to Team', and 'Request Update to Manager'. A red circle with the number '3' points to these buttons. Below the goal plan title is a table with columns: 'Due Date', 'Manager', 'Status', 'Goal Plan Started Date', 'Goal Plan Submitted Date', and 'Goal Plan Approved Date'. The 'Due Date' is 3/22/2019 and the 'Manager' is Leader 1. Below the table is a progress bar with stages: 'Not Started' (highlighted in blue), 'In Progress', 'Past Due', 'Submitted', 'Requires Modification', and 'Approved'. A red circle with the number '2' points to the 'Not Started' stage. At the bottom, there is an 'Approval History (0)' section. A red circle with the number '4' points to this section.

#	Process
1.	Identify that you are accessing your Goal Plan by verifying the name next to the star
2.	Status: As you progress through the approval process, the status will update accordingly
3.	<p>Button functions:</p> <p>Submit for Approval: If the Goal Plan is complete, the Submit for Approval button will enable you to send the Goal Plan to your manager</p> <p>Assign Goal to Team: Managers can share their Goals with their employees utilizing this function</p> <p>Request Update to Manager: If your manager has changed, but is not reflected in they application, you can make an administrative request for the change</p>
4.	Approval History: Displays historical approval information, and will also provide managers the function to Approve or Reject submitted employee Goal Plans

Competency: Accessing Your Competency Self Assessment

Competencies are assigned based on job role. You may have Leadership Competencies (shown here) or Professional Competencies.

✕ Initial Self Assessment

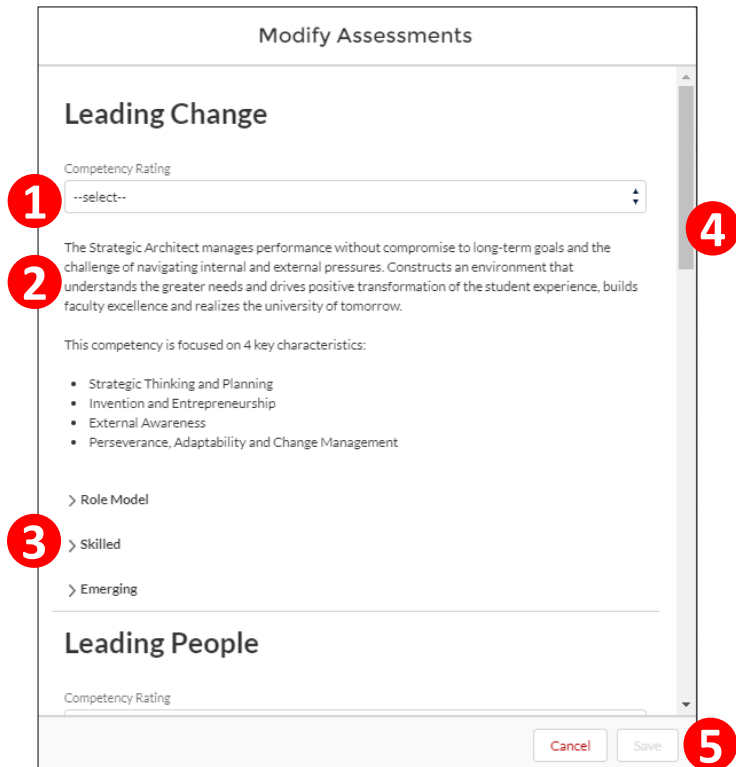
✕ Leadership

✕ Inspirational	No Value Selected	✕ Proactive Problem Solver	No Value Selected
✕ Resilient	No Value Selected	✕ Super Connector	No Value Selected
✕ Total Talent Developer	No Value Selected		

1
Edit

#	Process
1	<p>Competency: Click the Edit button to access the Self Assessment</p>

Goal Setting: Populating Your Competency Ratings



Modify Assessments

Leading Change

Competency Rating
--select--

The Strategic Architect manages performance without compromise to long-term goals and the challenge of navigating internal and external pressures. Constructs an environment that understands the greater needs and drives positive transformation of the student experience, builds faculty excellence and realizes the university of tomorrow.

This competency is focused on 4 key characteristics:

- Strategic Thinking and Planning
- Invention and Entrepreneurship
- External Awareness
- Perseverance, Adaptability and Change Management

> Role Model

> Skilled

> Emerging

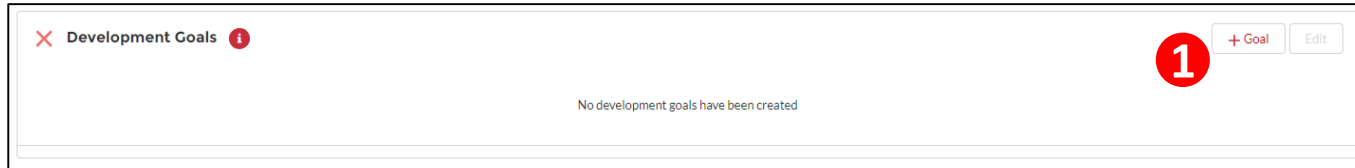
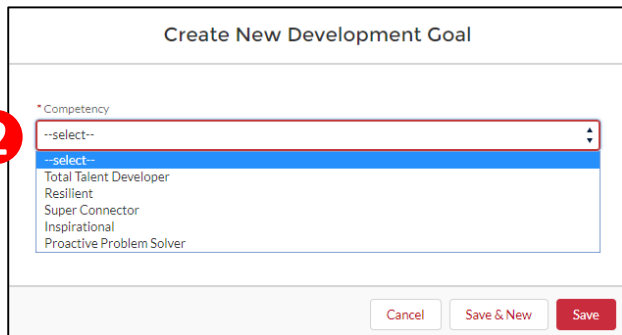
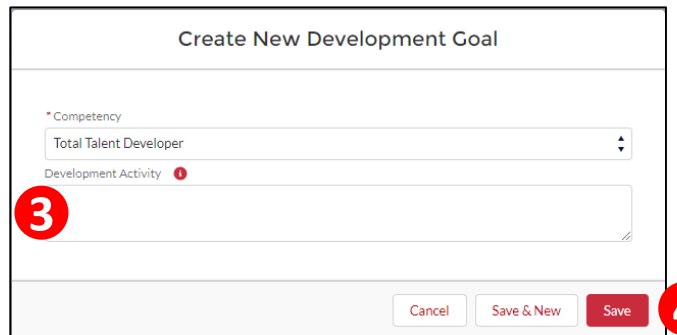
Leading People

Competency Rating

Cancel Save

#	Process
1.	Click the Competency Rating dropdown menu and after reviewing, select your Self Rating
2.	Read the Description and Key Behaviors to understand the competency behaviors
3.	Click each of the > symbol to review each rating description for each competency. Select your rating.
4.	Scroll down and repeat the process for each competency
5.	Click the Save button to capture your entries

Goal Setting: Creating Development Goals

#	Process
1.	Click the +Goal button to create a new Development Goal
2.	Click the Competency dropdown menu to select the competency associated with the Development Goal
3.	Populate the Development Activity field with your Development Goal *Review the Help section and review the materials for creating S.M.A.R.T goals
4.	Click Save to capture your entry

Goal Setting: Creating Performance Goals

✕ Performance Goals ⓘ
+ Goal
Edit

No performance goals have been created

Create New Performance Goal

Performance Goal ⓘ

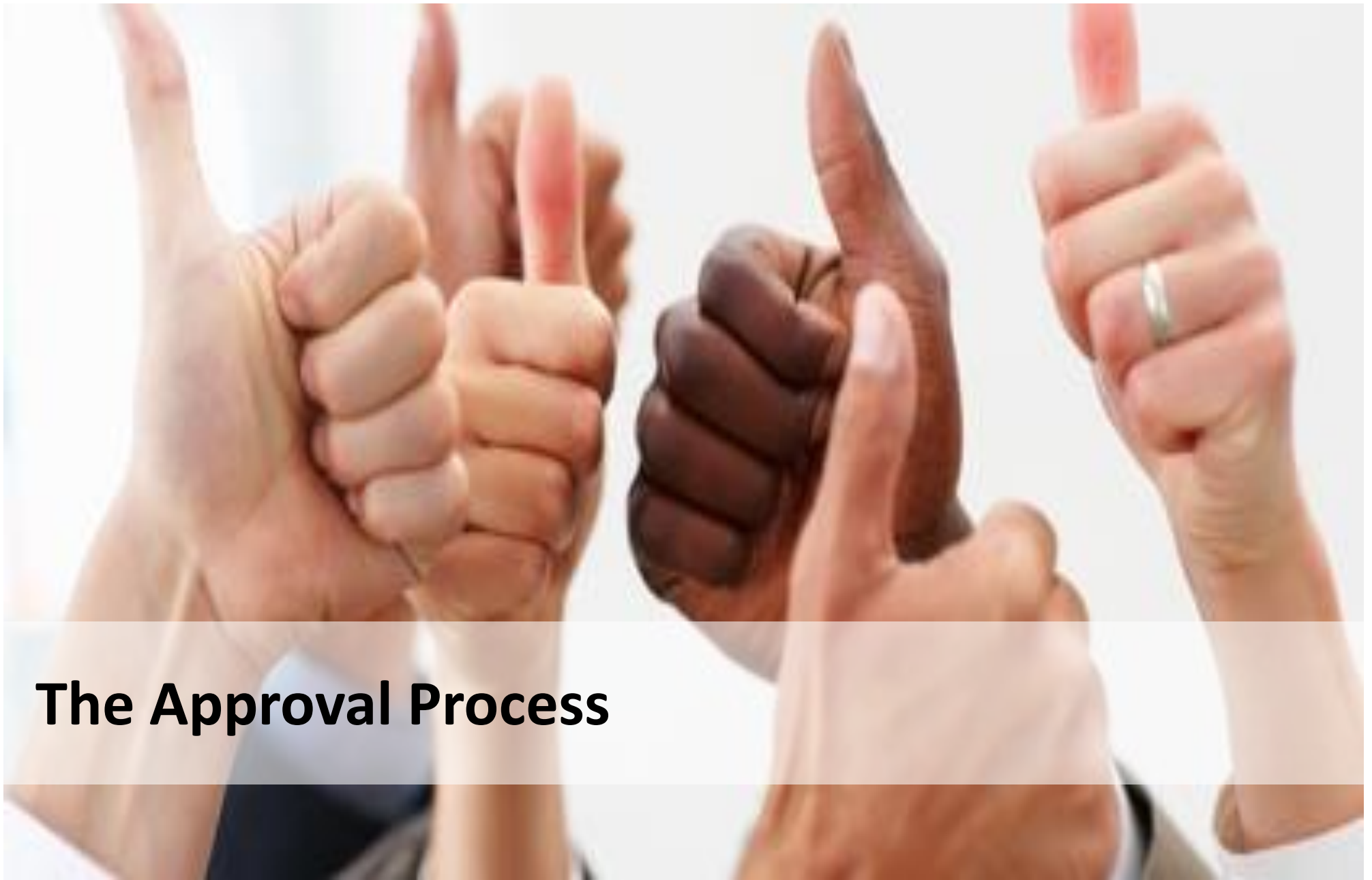
Base Threshold ⓘ

Median Threshold ⓘ

High Threshold ⓘ

Cancel
Save & New
Save

#	Process
1.	Click +Goal button to create a new Performance Goal
2.	All Goals are visible by your manager's manager and up the reporting structure
3.	Populate the Performance Goal field
4.	Populate the three associated Thresholds
5.	Click the Save button to capture your entries

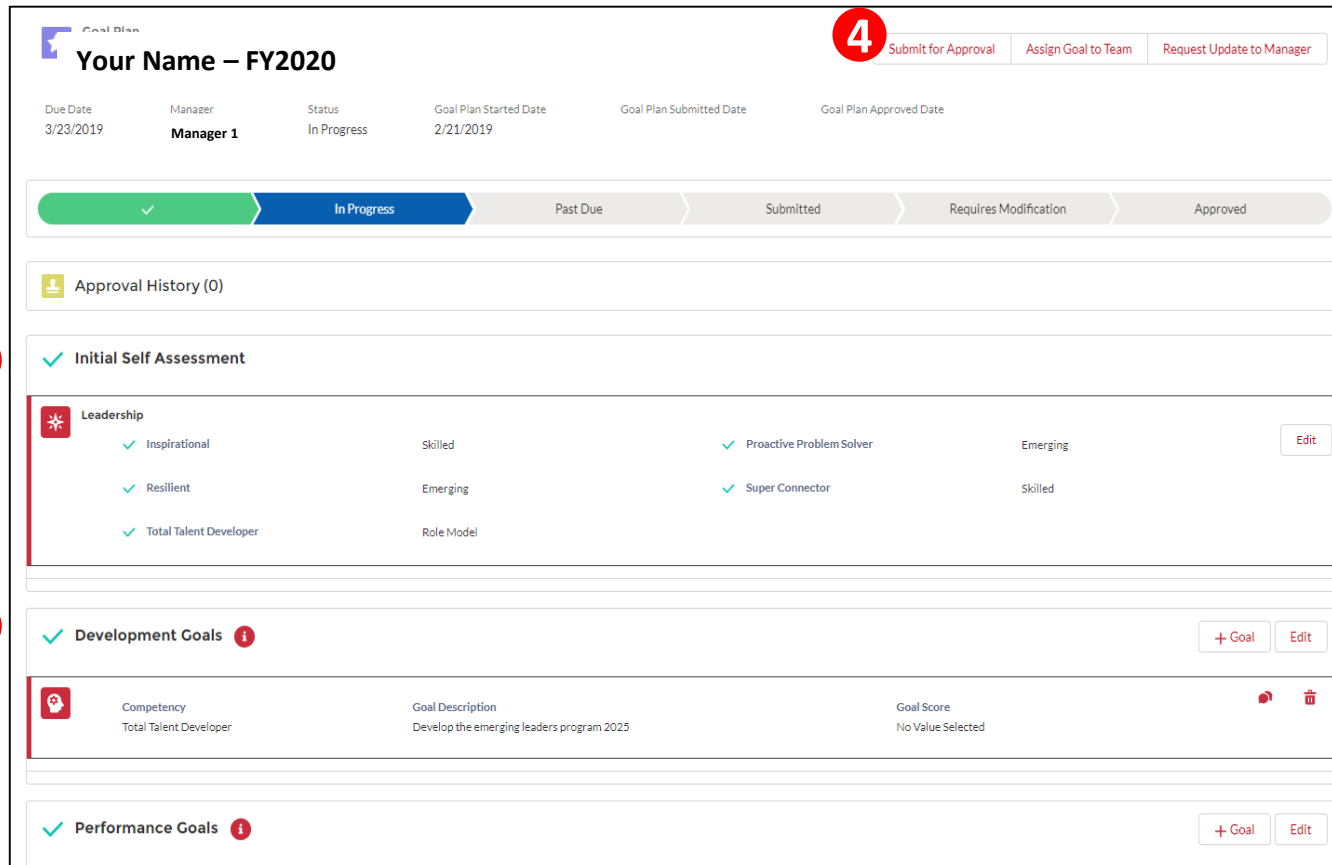


The Approval Process

Goal Setting: Submitting the Goal Plan for Approval

Recommendation:

The Goal Setting Process depends on the manager and employee discussing the development and performance goals before submitting to avoid rejection of your goal plan.



4 Submit for Approval Assign Goal to Team Request Update to Manager

Due Date: 3/23/2019 Manager: **Manager 1** Status: In Progress Goal Plan Started Date: 2/21/2019 Goal Plan Submitted Date: Goal Plan Approved Date:

✓ In Progress Past Due Submitted Requires Modification Approved

Approval History (0)

1 ✓ Initial Self Assessment

Leadership

- ✓ Inspirational Skilled ✓ Proactive Problem Solver Emerging Edit
- ✓ Resilient Emerging ✓ Super Connector Skilled
- ✓ Total Talent Developer Role Model

2 ✓ Development Goals + Goal Edit

Competency: Total Talent Developer Goal Description: Develop the emerging leaders program 2025 Goal Score: No Value Selected

3 ✓ Performance Goals + Goal Edit

#	Process
1.	Ensure that there is a green check mark next to the Initial Self Assessment indicating it is complete
2.	Ensure that there is a green check mark next to the Development Goals indicating it is complete
3.	Ensure that there is a green check mark next to the Performance Goals indicating it is complete
4.	Click the Submit for Approval button, locking the Goal Plan preventing further edits

Approvals: Submitting the Goal Plan for Approval

Submit for Approval

I have reviewed my goal plan and understand my developmental, professional and technical objectives for this evaluation cycle.

I Agree **1**

Next **2**

Submit for Approval

3 ✔ Your Goal Plan has been submitted for review.

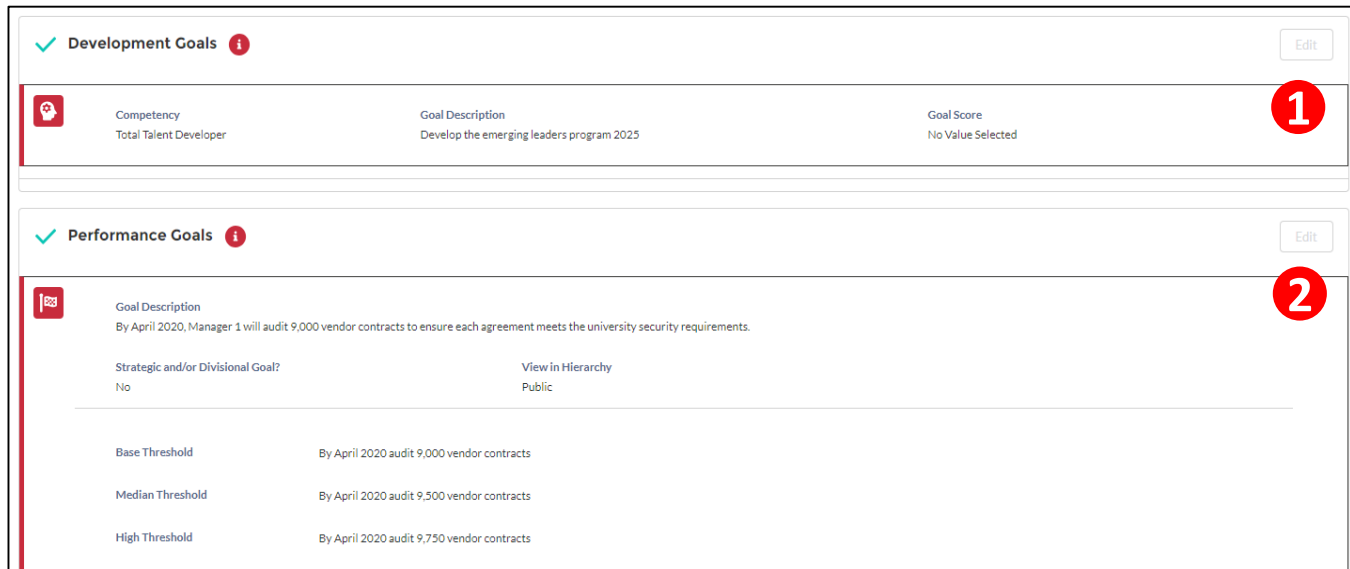
Finish **4**

#	Process
1.	Before the Goal Plan is sent to the manager, read the statement indicating that you have reviewed and understand the goal plan and your objectives. Check the “I Agree” check box
2.	Click Next
3.	A green check mark will appear indicating successful submission of the Goal Plan
4.	Click Finish to submit the Goal Plan to your manager



Progress Notes and Professional Development

Progress: Adding Comments to Goals



Development Goals 1

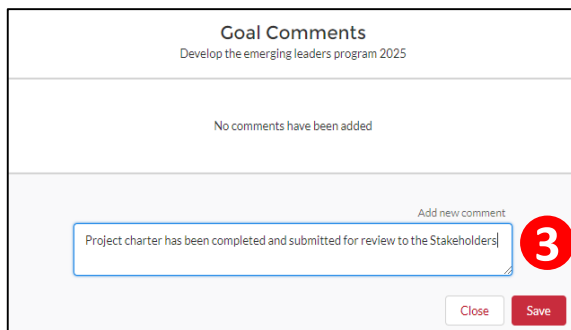
Competency: Total Talent Developer
Goal Description: Develop the emerging leaders program 2025
Goal Score: No Value Selected

Performance Goals 2

Goal Description: By April 2020, Manager 1 will audit 9,000 vendor contracts to ensure each agreement meets the university security requirements.

Strategic and/or Divisional Goal? No
View in Hierarchy: Public

Base Threshold: By April 2020 audit 9,000 vendor contracts
Median Threshold: By April 2020 audit 9,500 vendor contracts
High Threshold: By April 2020 audit 9,750 vendor contracts



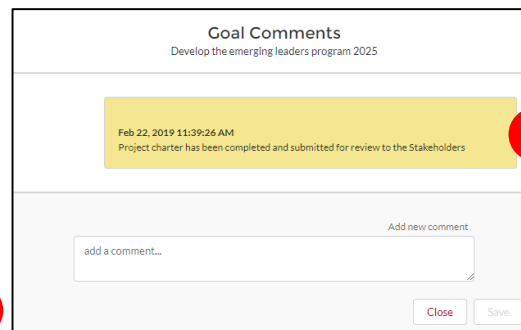
Goal Comments
Develop the emerging leaders program 2025

No comments have been added

Add new comment 3

Project charter has been completed and submitted for review to the Stakeholders

Close Save 4



Goal Comments
Develop the emerging leaders program 2025

Feb 22, 2019 11:39:26 AM
Project charter has been completed and submitted for review to the Stakeholders 5

add a comment...

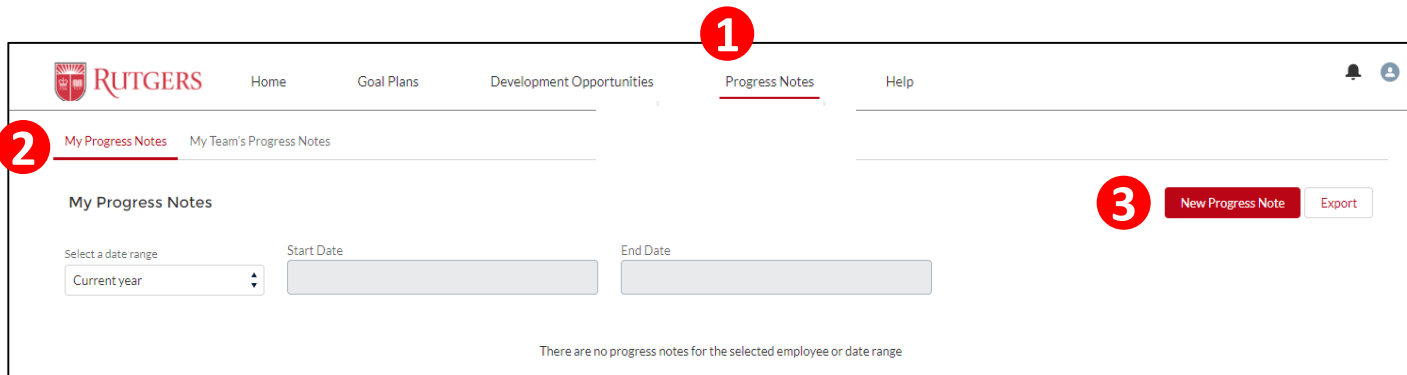
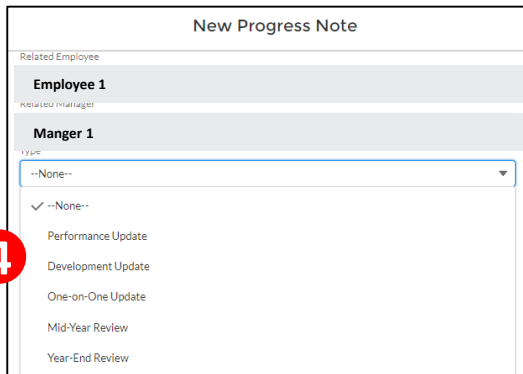
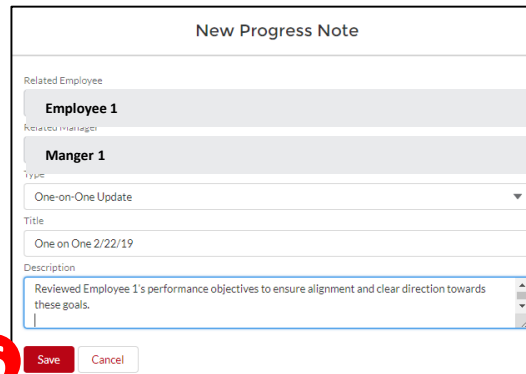
Add new comment

Close Save



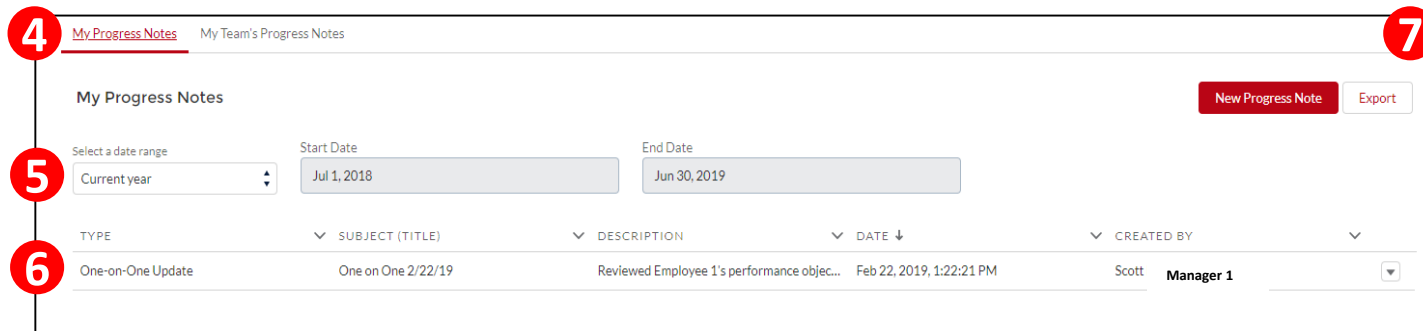
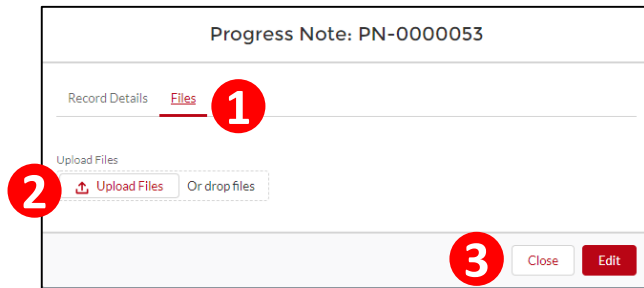
#	Process
1.	Managers and employees can record results towards Development Goals utilizing the Comments function Click the red Speech Bubbles icon to launch the Goal Comments function
2.	Managers and employees can record results towards Performance Goals utilizing the Comments function Click the red Speech Bubbles icon to launch the Goal Comments function
3.	Populate the Add New Comments field with the information to associate the update with the goal
4.	Click Save
5.	The comment will be recorded with a date stamp and will be maintained with additional comments from either the manager or employee
6.	An orange tab will appear on the left side of the screen Click the tab to send a notification to the employee or manager that a new comment has been created

Progress: Adding Comments to Your Progress Notes

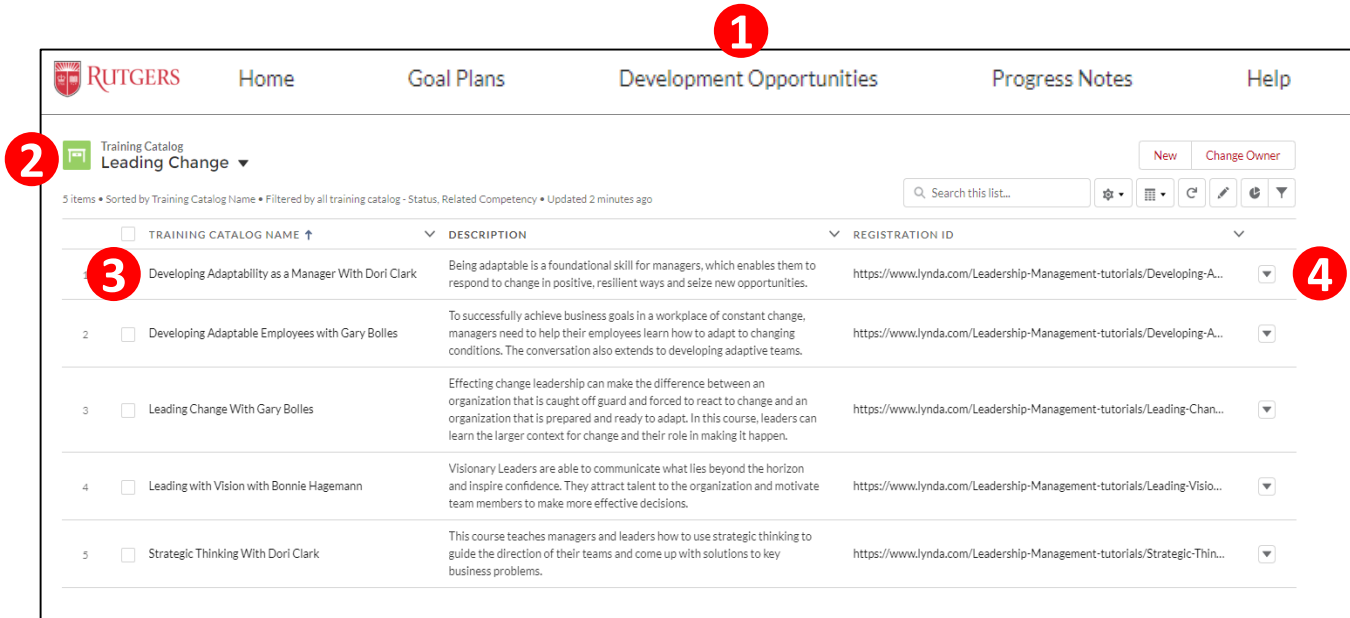
#	Process
1.	In the Global Navigation , click Progress Notes
2.	Click the My Progress Notes to view existing or create a new Progress Note
3.	Click the New Progress Note to create a new Progress Note
4.	Select which type of Progress Note you would like to create: Performance Goal Update Development Goal Update One on One Update Mid-Year Review End-of-Year Review
5.	Populate the Title and the Description fields
6.	Click Save to record your entry

Progress: Your Progress Notes (Uploading documents and Exporting)



#	Process
1.	To upload a file associated with the Progress Note, click the Files link
2.	Click the Upload Files button and browse your computer to locate the file
3.	Click the Close button to save your update or click the Edit button to make changes to the Progress Note .
4.	To Export the Progress notes for your records or for meeting preparation click the My Progress Notes link
5.	Or to Export the Progress note for your employee, click the My Team's Progress Notes link
6.	Select the Date range to locate the Progress Note by date
7.	Select the Progress note
8.	Click the Export button

Progress: Professional Development



The screenshot shows the 'Development Opportunities' page in the Rutgers LMS. The navigation bar at the top includes 'Home', 'Goal Plans', 'Development Opportunities', 'Progress Notes', and 'Help'. A 'Training Catalog' dropdown menu is open, showing 'Leading Change'. Below this, a list of five training courses is displayed. The first course, 'Developing Adaptability as a Manager With Dori Clark', is selected. The registration ID for this course is highlighted.

TRAINING CATALOG NAME	DESCRIPTION	REGISTRATION ID
Developing Adaptability as a Manager With Dori Clark	Being adaptable is a foundational skill for managers, which enables them to respond to change in positive, resilient ways and seize new opportunities.	https://www.lynda.com/Leadership-Management-tutorials/Developing-A...
Developing Adaptable Employees with Gary Bolles	To successfully achieve business goals in a workplace of constant change, managers need to help their employees learn how to adapt to changing conditions. The conversation also extends to developing adaptive teams.	https://www.lynda.com/Leadership-Management-tutorials/Developing-A...
Leading Change With Gary Bolles	Effecting change leadership can make the difference between an organization that is caught off guard and forced to react to change and an organization that is prepared and ready to adapt. In this course, leaders can learn the larger context for change and their role in making it happen.	https://www.lynda.com/Leadership-Management-tutorials/Leading-Chan...
Leading with Vision with Bonnie Hagemann	Visionary Leaders are able to communicate what lies beyond the horizon and inspire confidence. They attract talent to the organization and motivate team members to make more effective decisions.	https://www.lynda.com/Leadership-Management-tutorials/Leading-Visio...
Strategic Thinking With Dori Clark	This course teaches managers and leaders how to use strategic thinking to guide the direction of their teams and come up with solutions to key business problems.	https://www.lynda.com/Leadership-Management-tutorials/Strategic-Thin...

#	Process
1.	From the Global Navigation , click the Development Opportunities link
2.	Identify which competency is associated with the development goal you will be addressing
3.	Locate the training you will be launching
4.	Click the link to launch the course

Resources

Performance Management Website:

Visit <https://discover-uhr.rutgers.edu/performance-management/home>

Or Under “Help” in the Application: <https://rutgerstalent.force.com/>

Assistance:

Email: performancemanagement@hr.rutgers.edu