RUTGERS

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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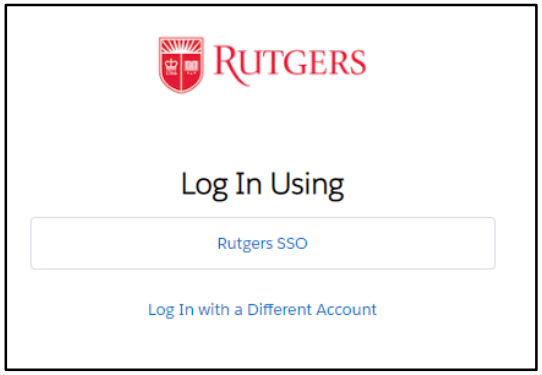
Log in: Use Chrome or Firefox browsers only

1

2 https://rutgerstalent.force.com/

Use your Rutgers NetID and Password



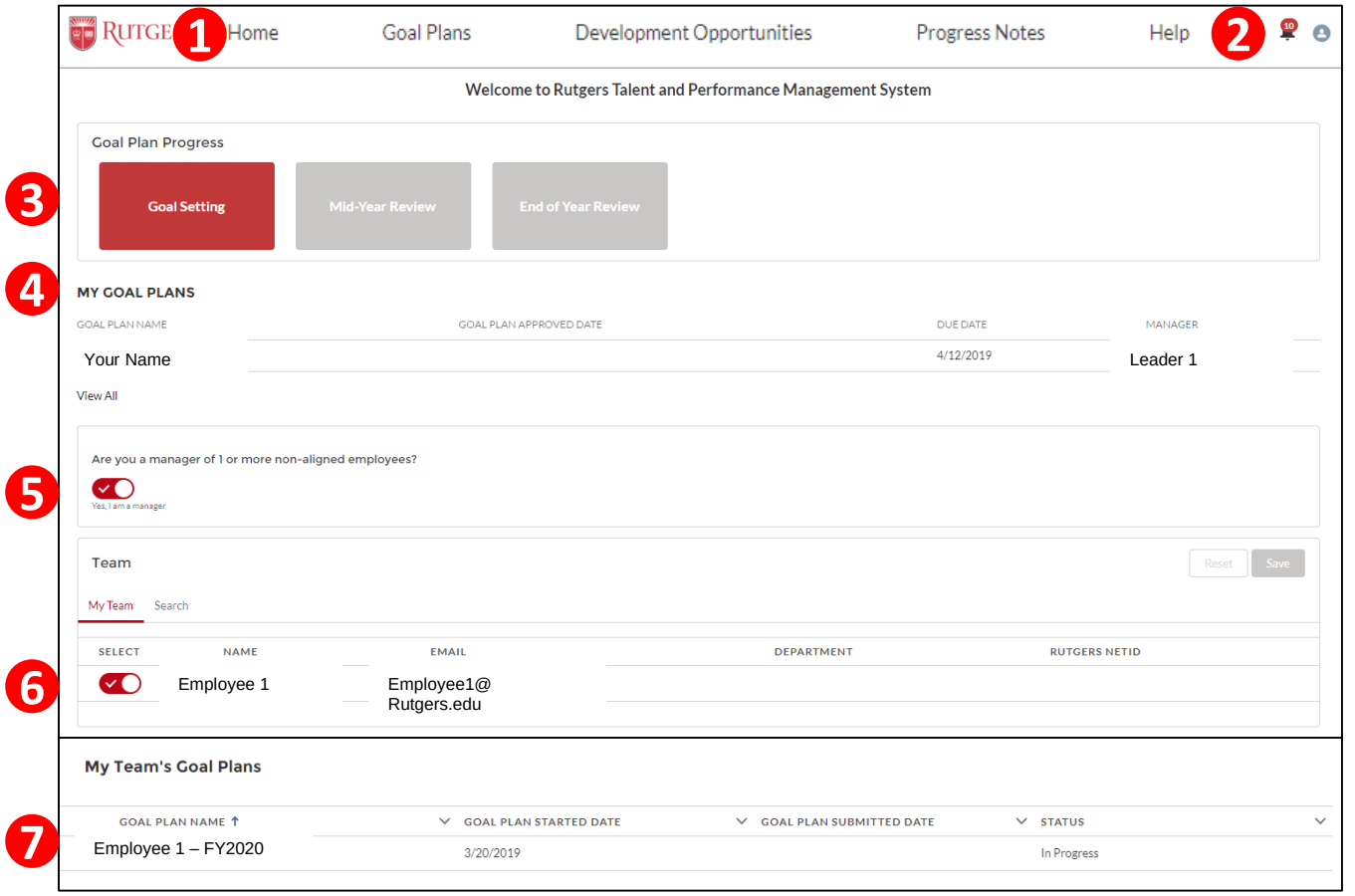
Do not log in using Internet Explorer browser or Edge.

#	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

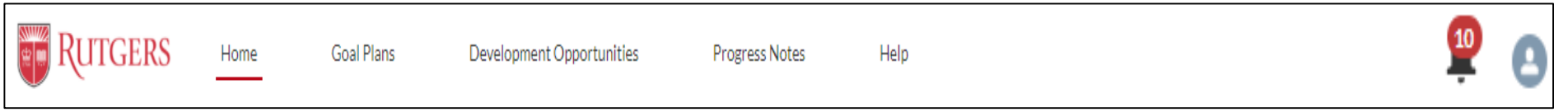


#	Functions
1.	**Global navigation:** **Home:** Access to the Homepage **Goal Plans:** Access yours and your employees Goal Plan **Development Opportunities**: Search and launch Development Opportunities **Progress Notes:** Create and review Progress Notes **Help:** Access Help, documentation and videos
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)

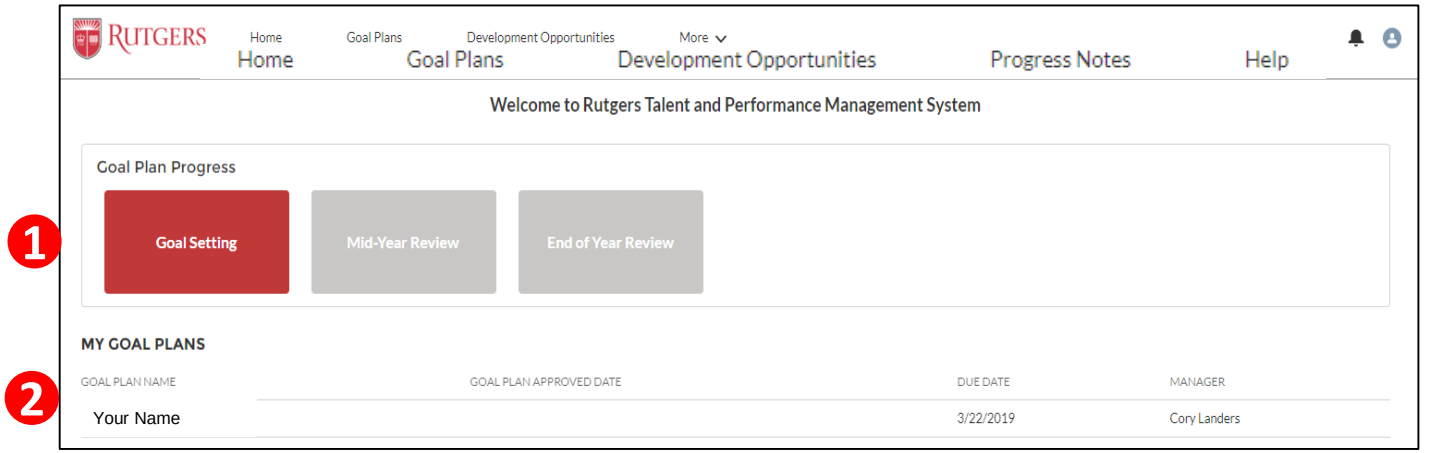
Accepting Your Managers Request to Add You to their Team

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

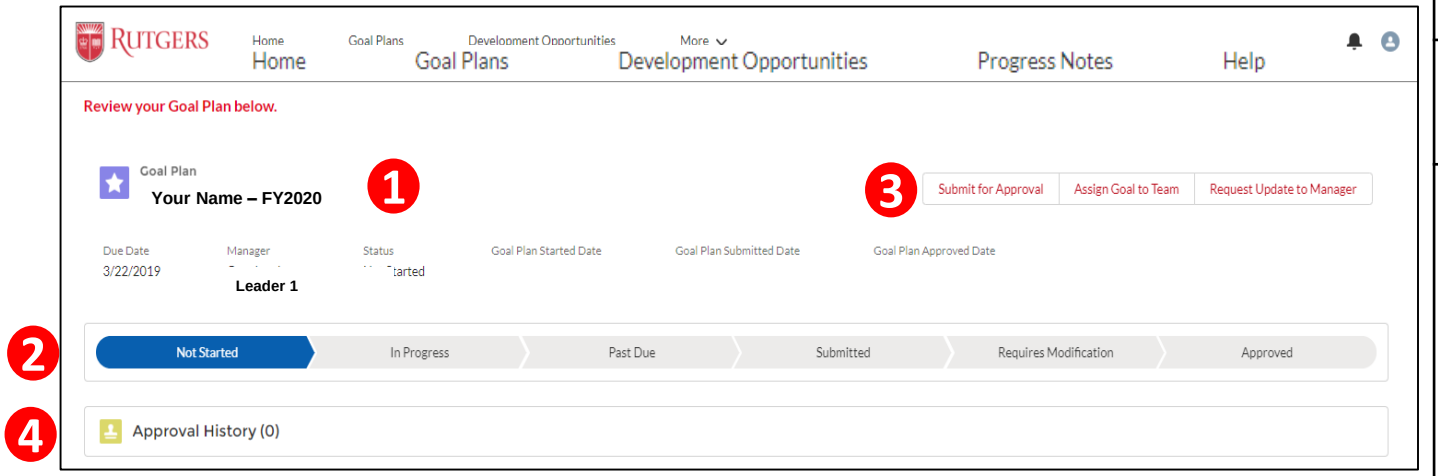


#	Process
1.	Access your goal plan by clicking the red **Goal Setting** icon
2.	Or, access your Goal Plan by clicking your name in the **My Goal Plans** section

Goal Setting starts with the Manager

However, establishing your Goal Plan is the <u>same</u> for both Manager and Employee.

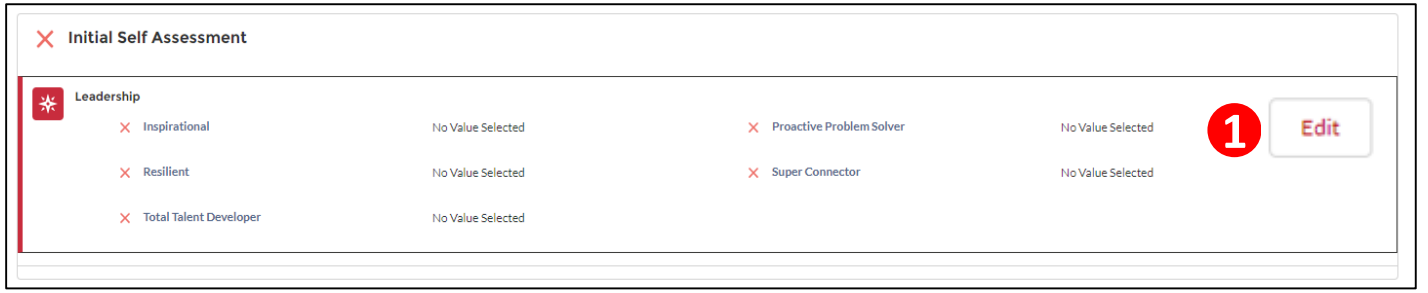
Goal Setting: Navigating Your Goal Plan



#	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.	**Button functions:** **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 **Assign Goal to Team:** Managers can share their **Goals** with their employees utilizing this function **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
4.	**Approval History:** Displays historical approval information, and will also provide managers the function to **Approve** or **Reject** submitted employee Goal Plans

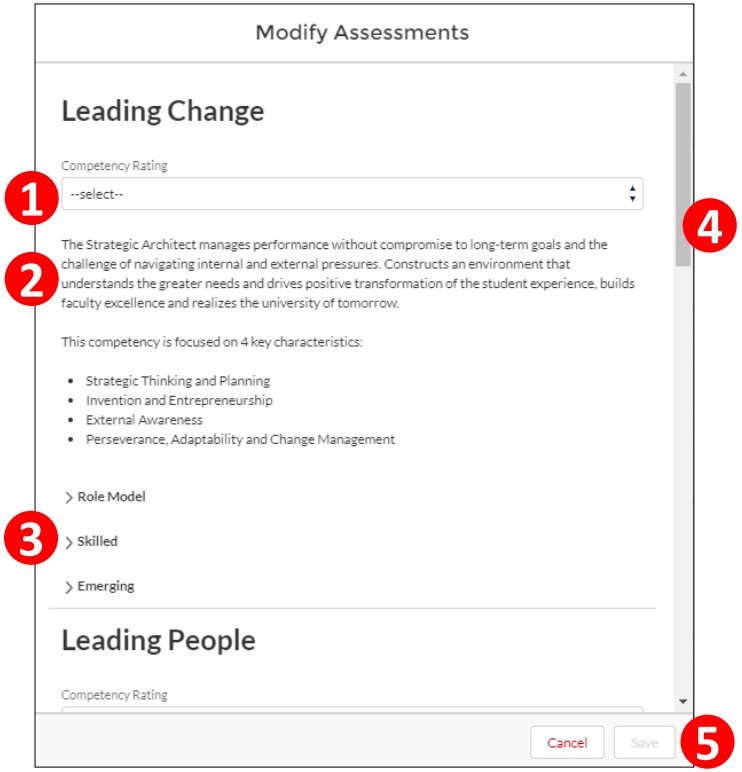
Competency: Accessing Your Competency Self Assessment

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



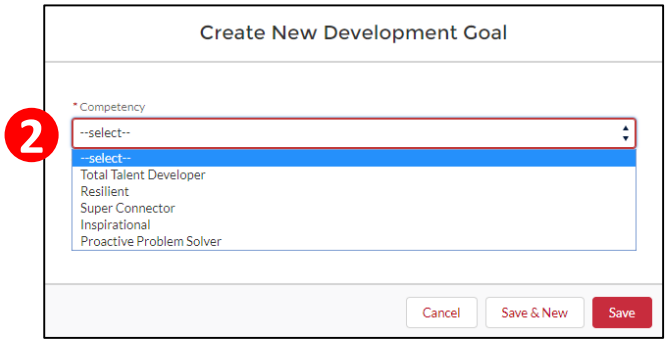
#	Process
1.	**Competency:** Click the Edit button to access the Self Assessment

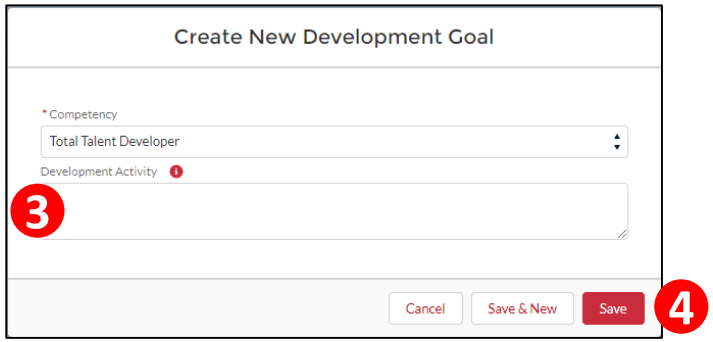
Goal Setting: Populating Your Competency Ratings



#	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

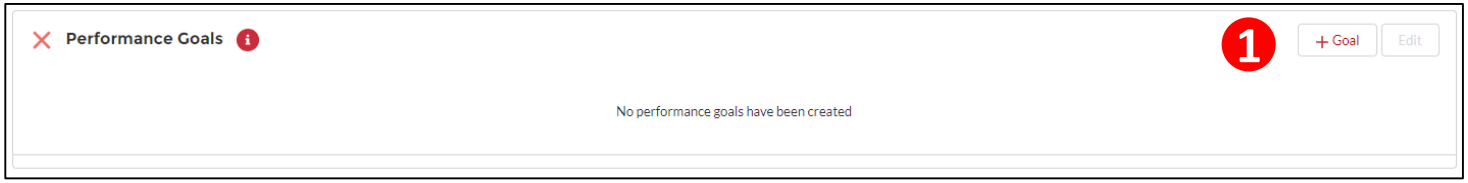
Goal Setting: Creating Development Goals

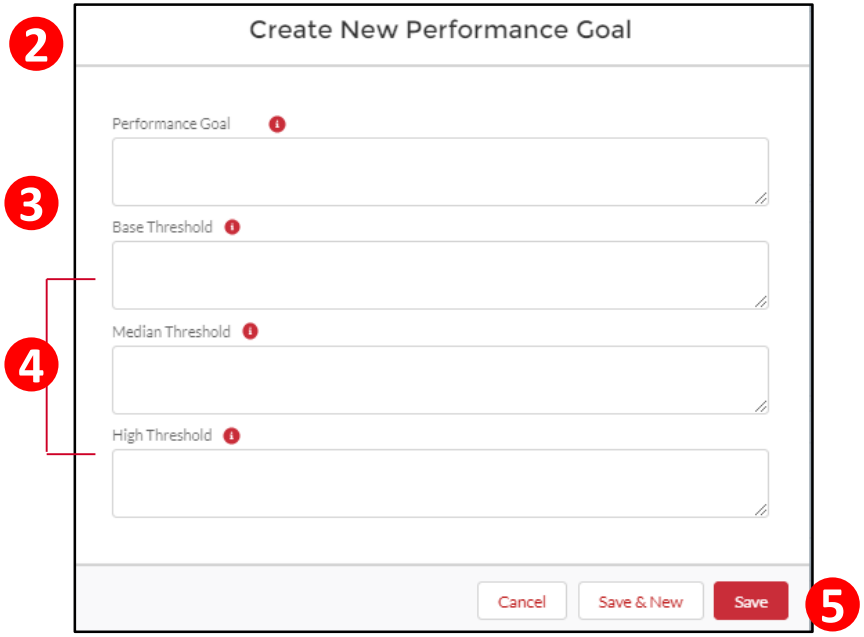




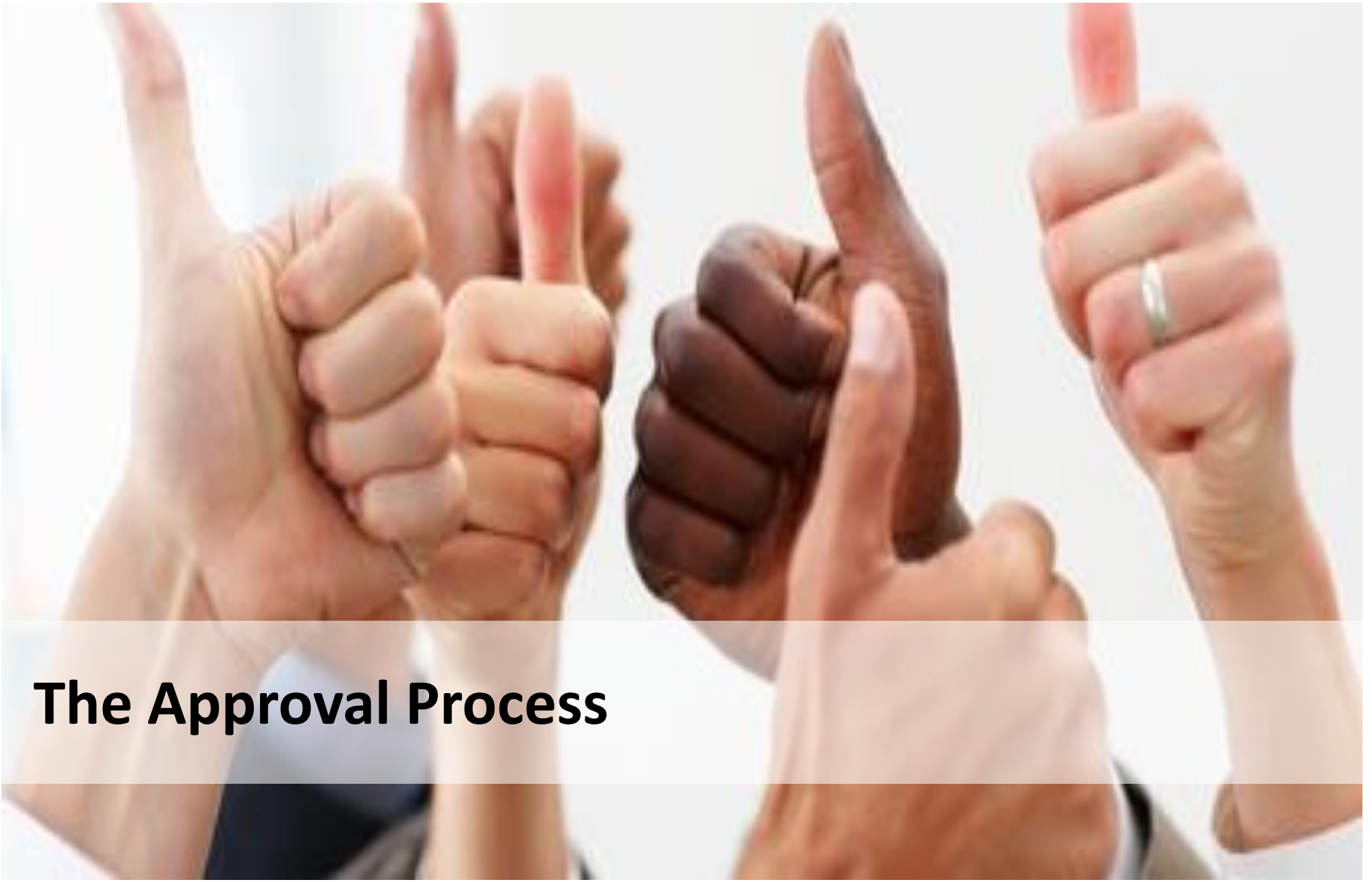
#	Process
1.	Click the **+Goal** button to create a new **Development Goal**
2.	Click the Competency dropdown menu to select the competency associated with the Development Goal
3.	Populate the **Development Activity field** with your Development Goal *Review the Help section and review the materials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

Goal Setting: Creating Performance Goals





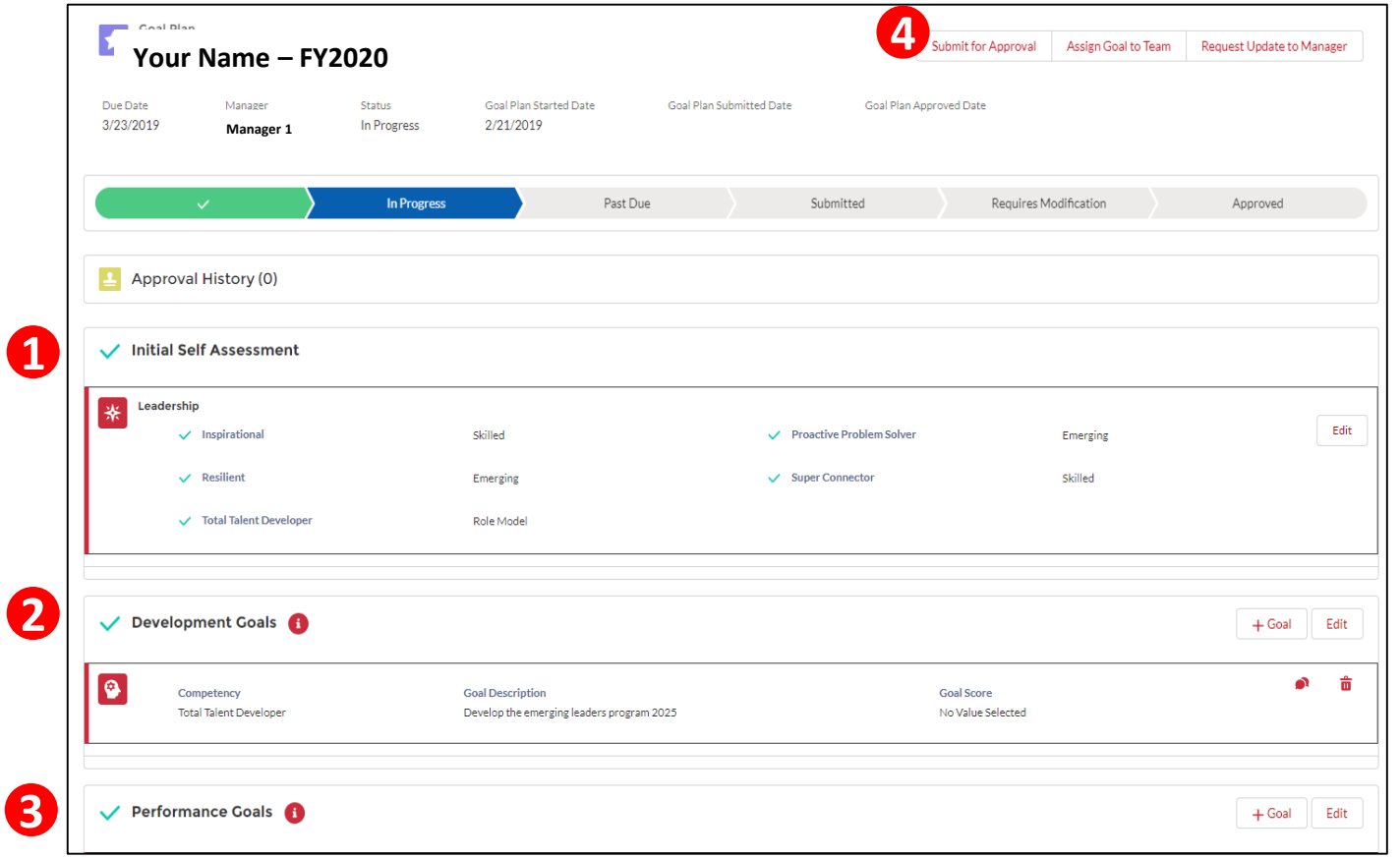
#	Process
1.	Click **+Goal** button to create a new **Performance Goal**
2.	All Goals are visible by your manager's manager and up the reporting structure
3.	Populate the **Performance Goal field**
4.	Populate the three associated **Thresholds**
5.	Click the **Save** button to capture your entries



The Approval Process

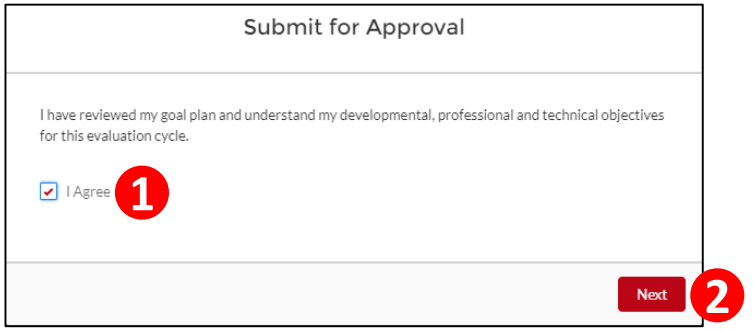
Goal Setting: Submitting the Goal Plan for Approval

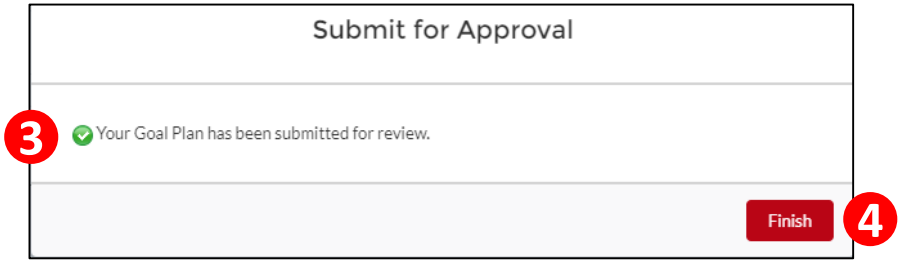
Recommendation:
The Goal Setting Process depends on the manager and employee discussing the development and performance goals before submitting to avoid rejection of your goal plan.



#	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





#	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

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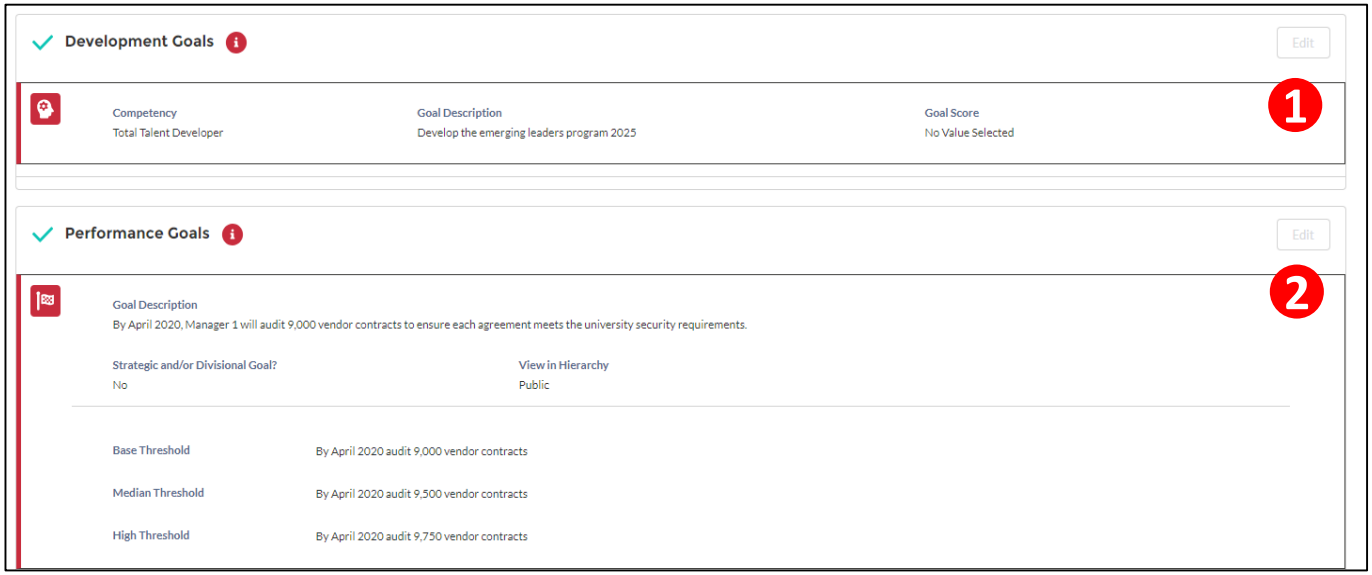
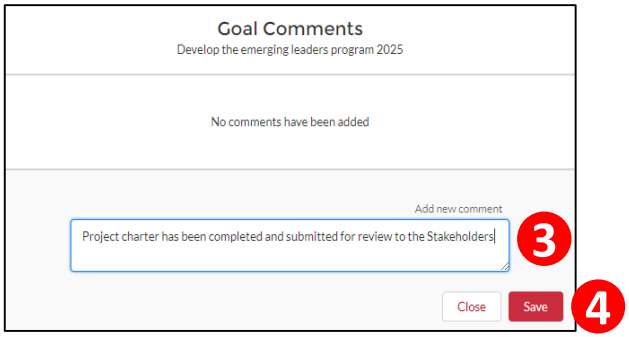
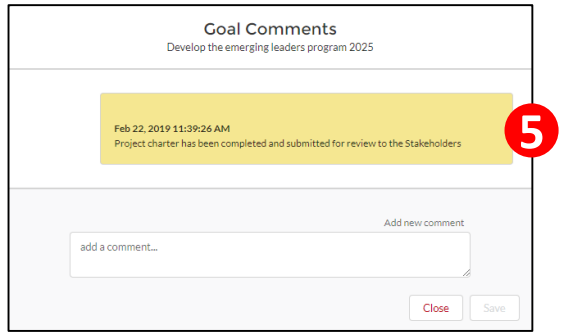
Progress Notes and Professional Development

Progress: Adding Comments to Goals

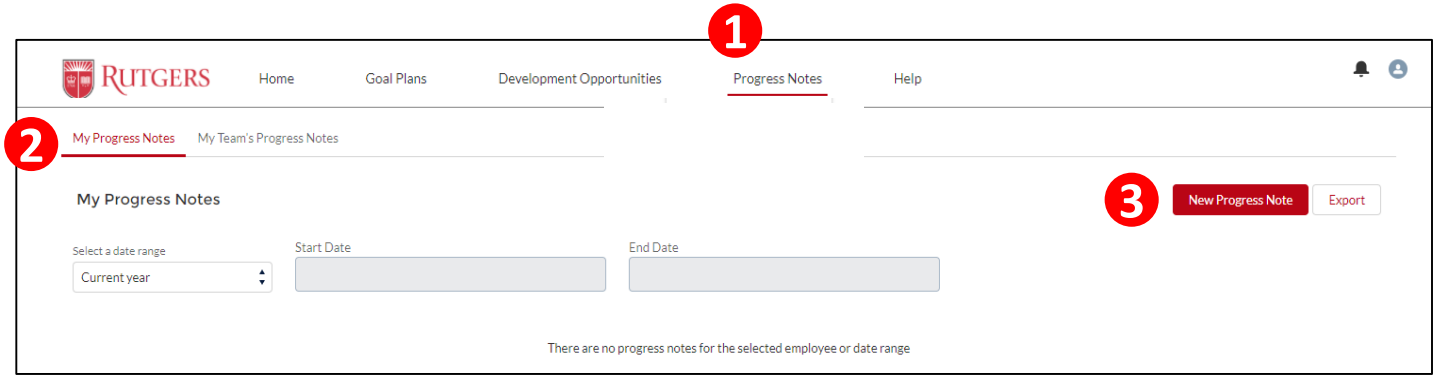


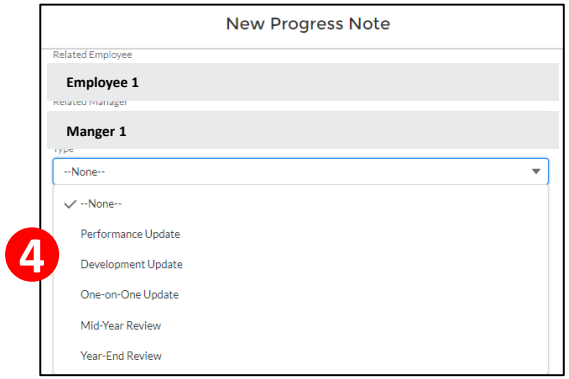


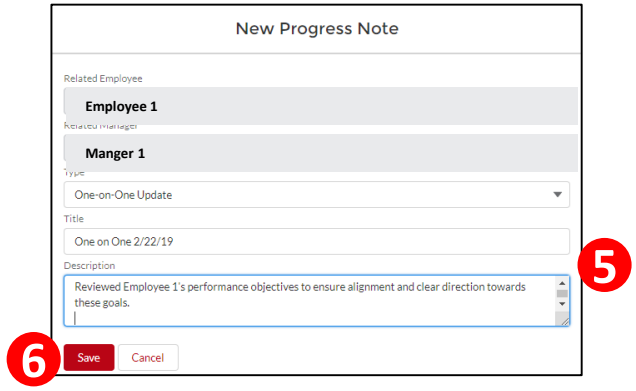


#	Process
1.	Managers and employees can record results towards **Development Goals** utilizing the **Comments** function Click the **red Speech Bubbles** icon to launch the **Goal Comments** function
2.	Managers and employees can record results towards **Performance Goals** utilizing the **Comments** 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

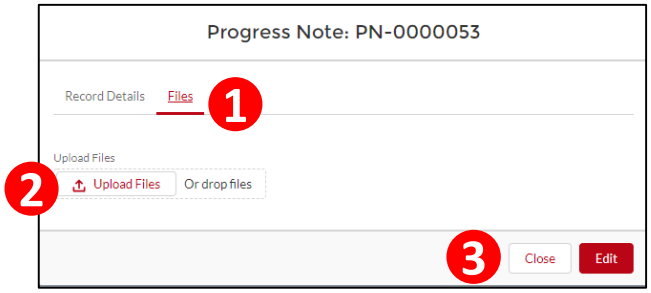


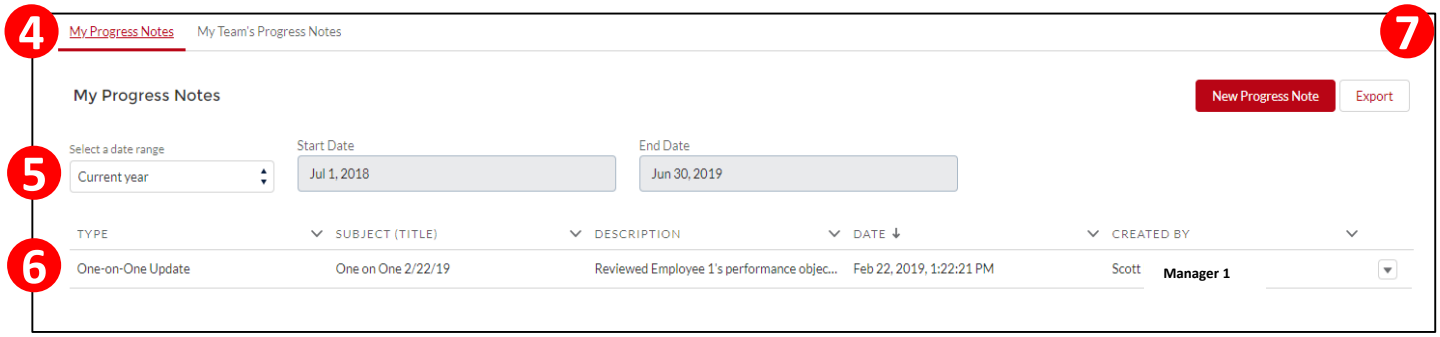




#	Process
1.	In the **Global Navigation**, click **Progress Notes**
2.	Click the **My Progress Notes** to view **existing** or **create** a new Progress Note
3.	Click the **New Progress Note** to create a new Progress Note
4.	Select which type of Progress Note you would like to create: **Performance 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

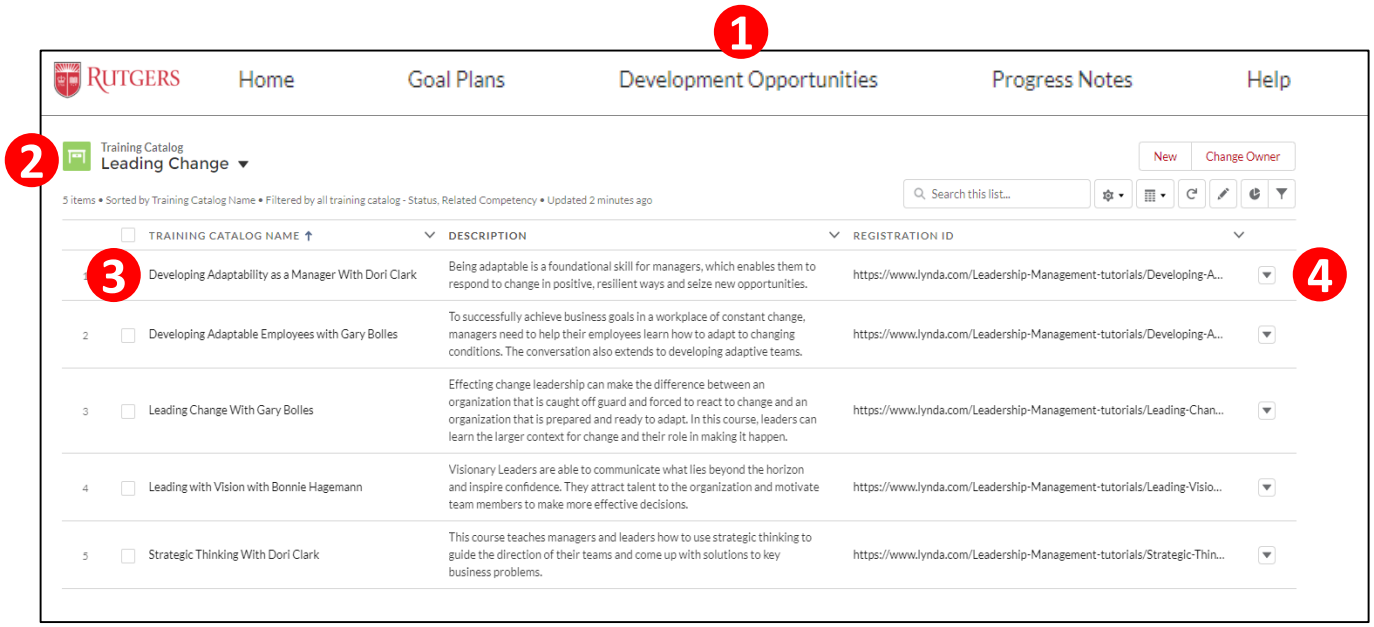
Progress: Your Progress Notes (Uploading documents and Exporting)





#	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



#	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