



RUTGERS

UNIVERSITY HUMAN RESOURCES



User Guide - The Mid-Year Process

RUTGERS
THE STATE UNIVERSITY
OF NEW JERSEY



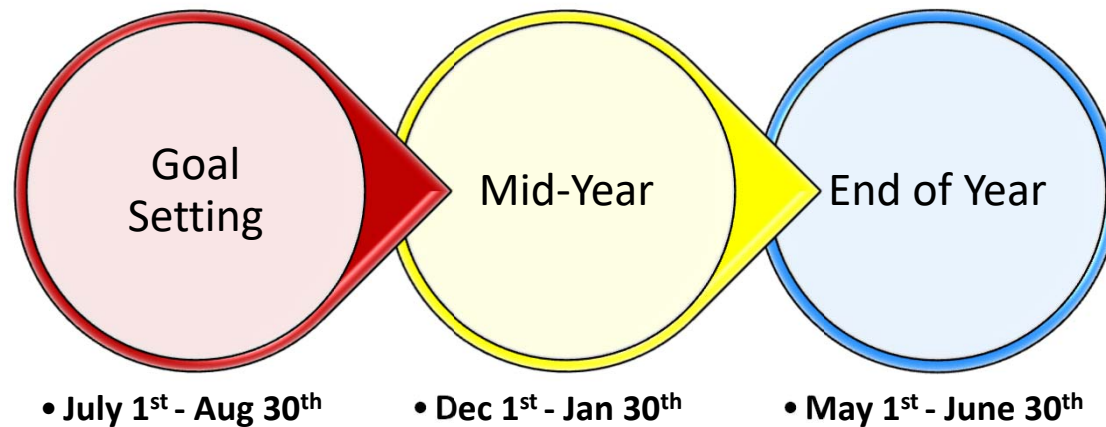
Table of Contents

Review the tutorials on the Performance Management website to review the Mid-Year User functions before using this guide. It will walk through all pages you see here.

All User's Functions in Performance Management: Mid-Year Review

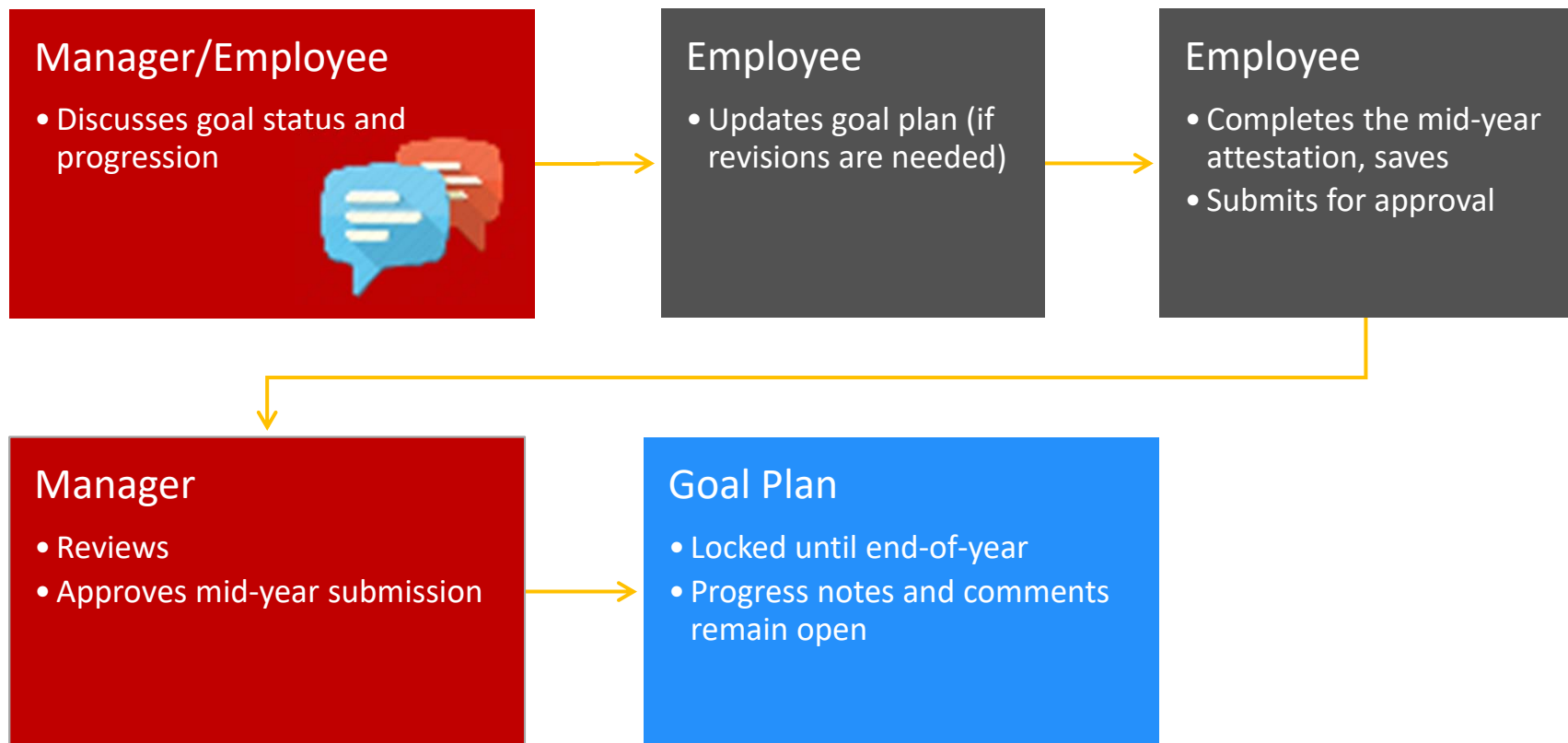
Page	Topics
3	Mid-Year Process time frame
4	The Mid-Year Process Workflow
5	Updating your In-line Goals
6	Updating your Progress Notes
7	The Mid-Year Review Meeting
8	Doing the Mid-Year Attestation
9	The Submission and Approval Process
10	Linked in Learning – Additional Resources

The Mid-Year Process – Open Dates



The Mid-Year Process

- User has been or now needs to update their Progress Notes and their In-line Goal Progress



Updating the In-line Goals – Before Meeting with Your Manager

RUTGERS

Home **1** Goal Plans Development Opportunities Progress Notes Help

Welcome to Rutgers Talent and Performance Management

Goal Plan Progress

Goal Setting Mid-Year Review **2** End of Year Review

Competency Agility

Goal Description

Complete the following course before November 15, 2019.
<https://www.lynda.com/Leadership-Management-tutorials/Developing-Adaptability-Manager/753899-2.html> (Shared by Manager)

3

4

4



1. On the Home page.
2. Click Mid-Year Review
3. Click the conversation bubble graphic to update the in-line goal progress. Do this for all your goals
4. When done, use the orange arrow conversation button on the left to send your Manager your goal plan update, then meet to discuss.

Updating the Progress Notes – Before Meeting with Your Manager

The screenshot shows the Rutgers Talent and Performance Management interface. The navigation bar includes 'Home', 'Goal Plans', 'Development Opportunities', 'Progress Notes' (highlighted with a red circle and the number 1), and 'Help'. Below the navigation bar, a 'Welcome to Rutgers Talent and Performance Manager' message is displayed. The 'Goal Plan Progress' section contains three buttons: 'Goal Setting', 'Mid-Year Review' (highlighted in red), and 'End of Year Review'. A 'New Progress Note' form is overlaid on the right side, with the following fields and values:

- Related Employee: Teri Hyatt
- Related Manager: Ebru Eftelioglu
- Type: Mid-Year Review
- Title: Update on Development Goals
- Description: I completed the Project Management 2 day program on the September 23, 2019. A certificate of completion will be uploaded.

Red numbered callouts 2, 3, and 4 point to the 'Mid-Year Review' button, the 'Type' dropdown, and the 'Description' field respectively.

1. User or Manager clicks on Progress Notes
2. Use dropdown to identify update Type
3. Give it a Title
4. Add the Description
5. Click Next
6. Click Upload in the next frame to add a scanned/pdf certificate, or related supporting document.

Both Managers and Staff Can See All Progress Notes Created.

The Mid-Year Review – Manager and Direct Report Meeting

- Discuss the progress of the Development Goals
- Discuss the progress of the Performance Goals
- ASK:
 - ✓ Are they still relevant to your role?
 - ✓ Do they still support the work of the unit?
 - ✓ To reach completion, are more resources or support needed?
 - ✓ Do they need to be Edited, or New goals added? **This is the time to do it!**

The screenshot shows the Rutgers Talent and Performance Manager interface. At the top, the Rutgers logo is on the left, and navigation links for Home, Goal Plans, Development Opportunities, Progress Notes, and Help are on the right. The 'Home' link is underlined and has a red circle with the number '1' next to it. Below the navigation bar, a welcome message reads 'Welcome to Rutgers Talent and Performance Manager'. Underneath, a 'Goal Plan Progress' section contains three buttons: 'Goal Setting', 'Mid-Year Review', and 'End of Year Review'. The 'Mid-Year Review' button is highlighted in red and has a red circle with the number '2' next to it. At the bottom of the page, a goal card is visible with a red circle with the number '3' next to it. The goal card includes a competency icon, the text 'Competency Agility', a 'Goal Description' section with a URL, and two buttons: '+ Goal' and 'Edit'.

To Edit or Add Goals

1. Click Home
2. Click the Red Mid-Year box
3. Scroll to Goal to be Edited, Click Edit or click + Goal to make a new goal.
4. Be sure to Save

Review the 3-minute User-Goal Setting tutorial on the website, if needed.

The Mid-Year Review Attestation

After meeting with your Manager, make any adjustments to the goal plan discussed. Follow the Goal Setting tutorials if you have questions. Be sure to Save your work.

- 1. 2. and 3. Complete the Mid-Year Review by clicking the drop-down, click Yes. Add a comment if you choose.
- 4. Click Save.

Mid-Year Review 4 Save Cancel

Please re-submit your goal plan for approval

- 1 Have you reviewed your goal plan with your manager?
- 2 Did you receive constructive feedback from your manager? --None--
 Yes
- 3 Any additional comments regarding your Mid-Year Review with your manager?

The Mid-Year Review Submit

1. Notice the RED X at Mid-Year Review has turned Green
2. Click Submit For Approval



★ Goal Plan
Teri Hyatt - FY2020

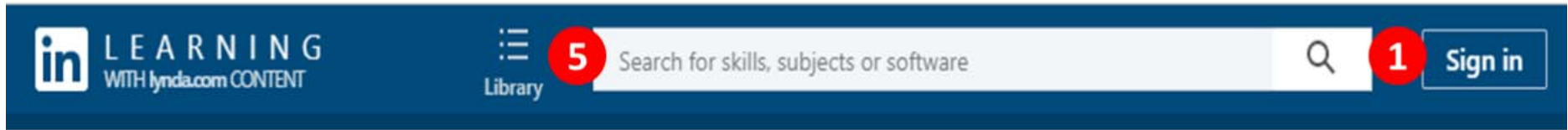
2 Submit for Approval Assign Goal to Team Change Listed Manager

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
6/20/2019	Ebru Eftelioglu	Submitted	7/20/2019	10/2/2019	10/2/2019

Submitted Requires Modification Approved

If your manager tells you it needs revision, they will need to click Reject to unlock it. They will provide comments and return it for modifications. Once revisions are made, you will need to resubmit it again for final approval. This is an important step to prepare for End of Year review.

LinkedIn Learning - Additional Resources



Rutgers has partnered with Linked in Learning previously known as Lynda.com to provide a free online learning resource for all Faculty, Staff and Students.

Follow these directions to the site:

www.linkedin.com

1. Click Sign in
2. Click Sign in with your organization account
3. Enter your work email
4. Enter your NetID and Password
5. Search for topics of interest using key words

