



RUTGERS

University Human Resources

Performance Management End of Year Review

Manager Process User Guide



Getting Ready for End of Year Review

1 Before getting started, on your **Home** page, confirm your manager's name is correct. If not, click on the goal plan page; then, click on **Change Listed Manager** and follow the process on the form.

2 Under **Manage My Team** confirm all your non-aligned (non-union) direct reports are listed in you My Team list. If not, click Search, add their name and Save to send them an invite to join your team.

The screenshot displays the Rutgers PM System interface. At the top, there is a navigation bar with the Rutgers logo and links for Home, Goal Plans, Development Opportunities, Progress Notes, and Help. Below this is a section titled "MY GOAL PLANS" with a table listing goal plans. The first row is "ManagerA Test10 - FY2020" with an approved date of "3/5/2020" and a due date of "3/5/2020". A red box highlights the "Manager" column, showing "SecondManagerA Test100". A red circle with the number "1" is placed over this box. Below the table is a "View All" link and a question: "Are you a manager of 1 or more non-aligned employees?" with a checked radio button and the text "Yes, I am a manager". Below this is a "My Team" section with a "Search" button. A search box contains "test1" and a "Search" button. Below the search box is a table with columns "SELECT", "NAME", "EMAIL", "DEPARTMENT", and "RUTGERS NETID". The table lists three employees: "Test1, Employee A", "Test1, Employee B", and "Test1, Employee C". A red box highlights the "SELECT" column, showing checked radio buttons for Employee A and Employee B, and an unchecked radio button for Employee C. A red circle with the number "2" is placed over the "My Team" section.

Goal Plan Name	Goal Plan Approved Date	Due Date	Manager
ManagerA Test10 - FY2020	3/5/2020	3/5/2020	SecondManagerA Test100

Are you a manager of 1 or more non-aligned employees?

Yes, I am a manager

My Team Search

Search for people

test1 Search

SELECT	NAME	EMAIL	DEPARTMENT	RUTGERS NETID
<input checked="" type="checkbox"/>	Test1, Employee A	hyattt1@hr.rutgers.edu		
<input checked="" type="checkbox"/>	Test1, Employee B	hyattt1@hr.rutgers.edu		
<input type="checkbox"/>	Test1, Employee C	hyattt1@hr.rutgers.edu		

Tip 1: You can also untoggled and save to release team members.

Tip 2: You can use your credentials to log in a second time on a new browser window or a new tab to review progress notes on one and a report's goal plans on the other.

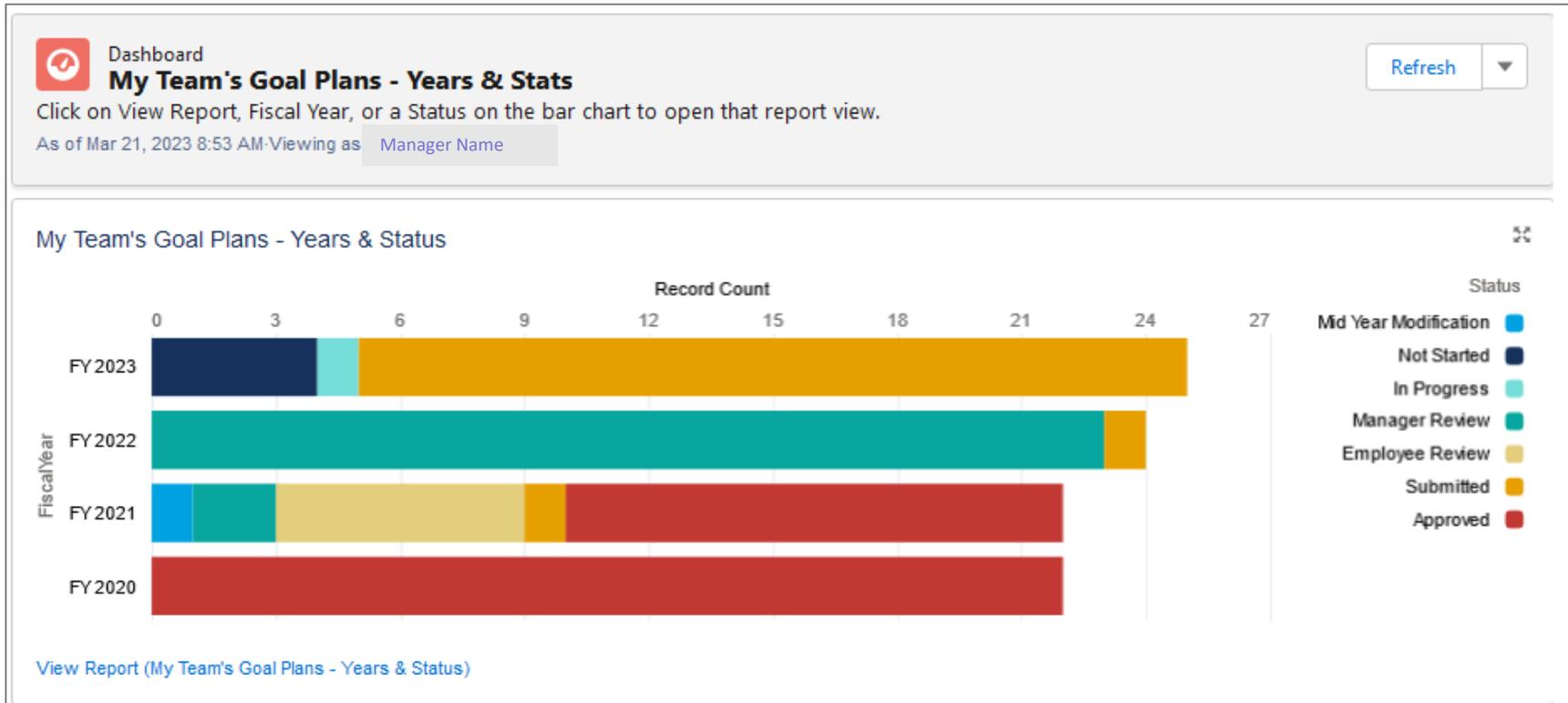
Login to the PM System:
<https://rutgerstalent.force.com>

Manager Dashboards – My Team’s Goal Plans

Goal Plan Page Dashboards – A graphic representation of your employee’s goal plan status from present and past years. Click on the year, or just a section of the bar chart or the report name at the bottom to see all years.

Allows you to see your employees present and past goal plans in all status.

Always be sure to Refresh before viewing



Goal Plan PDF Generator

Located at the top of the Goal Plan

Manage your Goal Plan below.

The goal setting process is comprised of three sections: an initial self assessment of competencies, establishing development goals related to these competencies, and finally, establishing performance goals and goal thresholds. If you have any questions about how to enter this information, please click on the Help tab above.

PDF of Goal Plan

By checking the box to the right, and clicking the Send button a PDF of this goal plan will be sent to your Rutgers email.



Generate a PDF of the Goal Plan

Send

- 1 Click Generate a PDF of the Goal Plan
- 2 Click Send (if will go to the Requestor's email)

- Both the Manager and Employee can request
- Goal plan
 - All in-line comments
 - Progress notes
 - Any comments made by the employee and manager

** Not available when the goal plan is in Submitted status. If generating a PDF is needed, you can recall the goal plan or wait until the goal plan is approved.*

Update Progress Notes

Employee View

- 1 Click the **Progress Notes** tab
- 2 Click **My Progress Notes** to view existing notes
- 3 Click **New Progress Note** to create a new progress note
- 4 Select the type of progress note you would like to create: **Year-End Review**
- 5 Populate **Title** and **Description** and other fields with relevant information
- 6 Click **Save** to record your entry and upload supporting documents. **Tip:** If uploading a document, make note it in the description.

1

2

3

There are no progress notes for the selected employee or date range

New Progress Note

Related Employee
Employee 1 X

Related Manager
Manger 1 X

Type
--None--

✓ --None--

Performance Update

Development Update

One-on-One Update

Mid-Year Review

Year-End Review

4

New Progress Note

Related Employee
Employee 1 X

Related Manager
Manger 1 X

Type
--None--

Title

Description
Reviewed Employee 1's performance objectives to ensure alignment and clear direction towards these goals.

Save Cancel

5

6

Managers: Ask your direct report to alert you when they have completed this step.

Login to the PM System:
<https://rutgerstalent.force.com>

Update Progress Notes

Manager View

The screenshot shows the Rutgers Progress Notes Manager View interface. At the top, the Rutgers logo is on the left, and navigation links for Home, Goal Plans, Development Opportunities, Progress Notes (highlighted with a red circle 1), and Help are in the center. On the right, there are notification and user icons. Below the navigation bar, there are two tabs: My Progress Notes and My Team's Progress Notes (highlighted with a red circle 2). Under the My Team's Progress Notes tab, the heading "My Team's Progress Notes" is followed by a "New Progress Note" button (highlighted with a red circle 3) and an "Export" button. Below this, there are four input fields: "Select a team member" (a dropdown menu with "Employee A Test1" selected), "Select a date range" (a dropdown menu with "Current year" selected), "Start Date" (a text input field), and "End Date" (a text input field, highlighted with a red circle 4).

- 1 On the top navigation bar, Click Goal Plans, then Progress Notes
- 2 Click on My Team's Progress Notes, then review any entries from each of your direct reports.
- 3 Click **New Progress Note** and label it **End of Year** to tie it to this process.
- 4 Click on Export to send to you email, if desired.

Note: As a manager it is best practice to add **Progress Notes** for the employee prior to a reporting structure change. This will greatly assist the rating manager's assignment at end of year.

Login to the PM System:
<https://rutgerstalent.force.com>

Manager Assigns Performance Ratings

- 1 Click **Edit** on the Development Goals and use the drop-down menu to assign ratings. Click **Save**.
- 2 Click **Edit** on the Performance Goals and use the drop-down menu to assign ratings. Click **Save**.
- 3 Click Submit for Approval in the top right corner of the screen.
- * The Second Level Manager approval is required for “High” and “Did Not Meet Threshold” Overall ratings. They will receive an email notification alerting them to approve or reject this rating before returning to the manager.

The screenshot displays a user interface for setting performance goals. It is divided into two main sections: 'Development Goals' and 'Performance Goals'. Each section contains a table of goals. In the 'Development Goals' section, two goals are listed with the competency 'Professional Acumen' and goal description 'DGP1'. A dropdown menu for 'Goal Score' is open, showing options: '--None--', 'Achieved Development Goal', 'More Development Needed', and 'No Progress'. In the 'Performance Goals' section, one goal is listed with the description 'PCP1'. A dropdown menu for 'Goal Score' is open, showing options: '--None--', 'Goal No Longer Applicable', 'Did Not Meet Threshold', 'Base', 'Median', and 'High'. Red circles with numbers 1 and 2 highlight the dropdown menus and the 'Save' button respectively.

DID NOT MEET THRESHOLD

GOAL NO LONGER APPLICABLE: Lost Funding/ Resources, Postponed Goal to Next Year, or Goal was Deprioritized

HIGH: Stretch goal, requires significant effort for achievement. Far exceeds the agreed upon goal measure.

MEDIAN: Challenges the employee to exceed the agreed upon measure of the goal.

BASE: Meets the agreed upon expectation or measure of the goal.

Second Level Manager Review & Approval

- 1 The Second Level Manager receives an email notification requesting approval. Follow the link to review the goal plan.
- 2 If aligned with the ratings submitted by the First Level Manager, click **Approve** and an email of completion will be sent to them.
- 3 If you are not aligned, click **Reject** to return the goal plan to the First Level Manager for modification with your comments included. They will need to resubmit.
Note: Comments will go to the Manager's email only; they will not be seen by the employee.

Second-line Manager,

Manager submitted Manager's Direct Report - FY2020 for review.

If you agree with the assessment and goal scores as submitted, you can click Approve from the Goal Plan record.

If the Goal Plan requires adjustment, you may send it back to the manager with comments by clicking the Reject Approval button.

Click the link below to access the Goal Plan.

1 <https://rutgerstalent.force.com/s/goal-plan/a0K21000003RBXx>

Sincerely,

Rutgers University HR Team

The screenshot displays a horizontal progress bar with five stages: a green checkmark, 'Secondary Manager Review' (highlighted in blue), 'Employee Review', 'Submitted', 'Requires Modification', and 'Approved'. Below the progress bar, there is a section for 'Approval History (6)'. On the right side of this section, there are two buttons: 'Approve' (marked with a red circle '2') and 'Reject' (marked with a red circle '3').

Manager Share Ratings with Employee

- 1 If Second Level manager approval is needed, Manager will be able to proceed after approval email notification arrives.
- 2 Manager can now toggle the switch to open visibility of the rating to the employee.
- 3 Click **Agree** to the confirmation. An email is triggered for the employee to review.
- * When scheduling your End of Year Review conversation, allow at least two days for your employee to prepare for the conversation. Complete step 2 and 3 a few days prior to the meeting.



Manager,
Second-line Manager approved Direct Report - FY2020 for review.
Click the link below to access the Goal Plan.
1 <https://rutgerstalent.force.com/s/goal-plan/a0K21000003RBXx>
Sincerely,
Rutgers University
This email is sent from a generated address

Note: Schedule your meeting with the employee and open the review several days prior to the meeting.

2 Share ratings with employee? No →

3

Goal Plan is Ready for Approval

Please read the following statement and click the "I Agree" button before finalizing and submitting the employee's appraisal.

This evaluation, including ratings and narratives, reflects to the best of my knowledge the employee's performance for the evaluation cycle.

I Agree

Employee Notification to Review

Employee View

- 1 Your manager will review your goal plan and add ratings based on your updated Progress Notes. Once the manager level approvals have signed off on your goal plan, your manager will schedule your End of Year review.
- 2 You will receive a notification when your manager makes their ratings and the goal plan visible to you. Click the link in the email to view.



- 2 Your Manager has made year end updates to your goal plan.
Click the link below to access your goal plan.
<https://pmdev-pmdev-rutgerstalent.cs70.force.com/s/goal-plan/a0E3D00000n60o>
Should you have any questions, work directly with your manager.
Sincerely,
Rutgers University HR Team

Translating Overall Ratings

HIGH: Achieved the highest level on all agreed upon performance measures

MEDIAN: Achieved more than agreed upon performance measures

BASE: Achieved agreed upon performance measures

DID NOT MEET THRESHOLD

Login to the PM System:
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End of Year Review Conversation

This part of our performance management cycle is an opportunity for employees and managers to celebrate accomplishments, discuss strengths, and identify areas of further development in relation to position-specific responsibilities, overall performance, and career aspirations.

Use the **Employee Conversation guide** (*right*) to prepare for the conversation.

In conducting the End of Year Review, remember that your direct reports are counting on you for honest coaching and feedback. Approach the conversation with a growth mindset, ready to provide opportunities for growth and recognize where any growth has taken place, as well.



Performance Management End of Year Review Manager Process Overview

Want to make the most of your End of Year Review? Start here!
From **May 1 - June 30**, our Performance Management system opens for End of Year Review. This piece of our performance cycle is an opportunity for employees and managers to celebrate accomplishments, discuss strengths, and identify areas of further development in relation to position-specific responsibilities, overall performance, and career aspirations.

Preparing for the process

1. Proactively review the goals and Progress Notes your team has entered in the system. Note any changes to your function's strategic priorities and identify their impact on your team's written goals.
2. Schedule time with each of your direct reports at least 2-3 weeks in advance to ensure all are prepared for their End of Year Review.

Conducting the conversation

- In conducting the End of Year Review, remember that your direct reports are counting on you for honest coaching and feedback. Approach the conversation with a growth mindset, ready to provide opportunities for growth and recognize where any growth has taken place, as well.
- Ask your direct report open-ended questions to generate a more productive dialogue:
 - What accomplishments are you proud of over the last six months?
 - What was a miss, and how did you learn from it?
 - How can I – as your manager – better support you?
- At the end of the conversation, thank your direct report for all their work over this past year. Restate goals that you will revisit in the next fiscal year (if any). Be sure to take notes during the session so that you can update the **Progress Notes** in the system accordingly.

Finalization

1. After conducting the End of Year Review conversation, your direct report will make the necessary updates in the Performance Management Tool. Use this time to update the **Progress Notes** section.
2. The updated goals will arrive in your queue after your direct report selects **Submit for Approval**.
3. Based on their inputs and the alignment with your conversation, **Approve** or **Reject** the goals.

*Want to learn more about the system? [Click here for the End of Year Review System Guide for Managers.](#)
For more resources and tutorials, visit the [OneRED website.](#)*

End of Year Review Confirmation

Employee View

* Login to the [Performance Management System](#)

1 Click **Edit** on End of Year Review

2 Answer the questions using the dropdown. Leave a comment, if desired.

3 Click **Save**

4 At the top, click **Submit for Approval**. On the next screen, select **Finish**.

The screenshot displays the 'End of Year Review' confirmation screen in the Performance Management System. At the top, there is a header for 'Goal Plan' with fields for 'First Name', 'Last Name', and 'FY202X'. A red circle with the number '4' highlights the 'Submit for Approval' button. Below the header is a table with columns: 'Due Date', 'Manager', 'Status', 'Goal Plan Started Date', 'Goal Plan Submitted Date', and 'Goal Plan Approved Date'. The 'Status' column shows 'Employee Review'. Below the table is a progress bar with five stages: 'Submitted', 'Requires Modification', 'Approved', 'Employee Review' (highlighted in blue), and 'Submitted'. Below the progress bar is a form titled 'End of Year Review' with a red 'X' icon and an 'Edit' button (highlighted with a red circle '1'). The form contains the text 'Please submit your goal plan for approval' and three questions, each with a dropdown menu showing 'No Value Selected': 'Have you reviewed your goal plan with your manager?', 'Did you receive constructive feedback from your manager?', and 'Any additional comments regarding your Year-End Review with your manager?'. A red 'Save' button (highlighted with a red circle '3') is located at the bottom right of the form.

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
6/20/2019	Manager 1	Employee Review	9/4/2019	11/1/2019	11/1/2019

End of Year Review 1 Edit

Please submit your goal plan for approval

2

Have you reviewed your goal plan with your manager? No Value Selected

Did you receive constructive feedback from your manager? No Value Selected

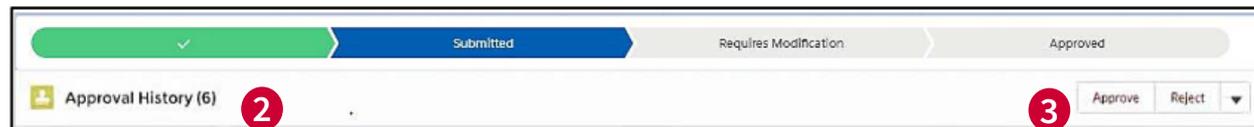
Any additional comments regarding your Year-End Review with your manager? No Value Selected

3 Save

End of Year Final Approval

Manager's View

- * Login to the [Performance Management System](#)
- 1 Click on the employee's goal plan
- 2 Scroll down to the **Approval History** box under the ribbon.
- 3 Click **Approve**, goal plan will shift and be closed for the year.



Tip: For the PDF creator to work, the goal plans cannot be in a submitted status. All other statuses will work. Look at your Goal Plans tab My Team's Goal Plan bar graph to ensure all your past year's goal plans have been moved from Submitted to Approved.