RUTGERS
University Human Resources

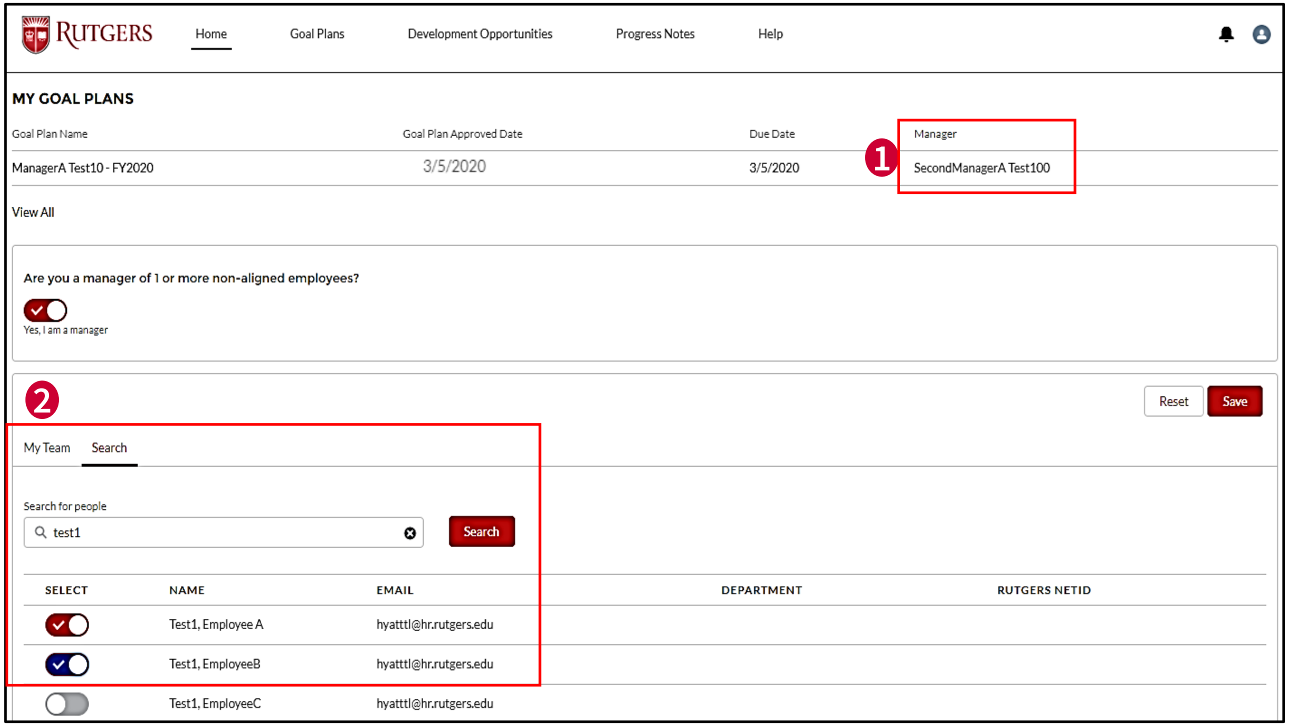
Performance Management End of Year Review

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.



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

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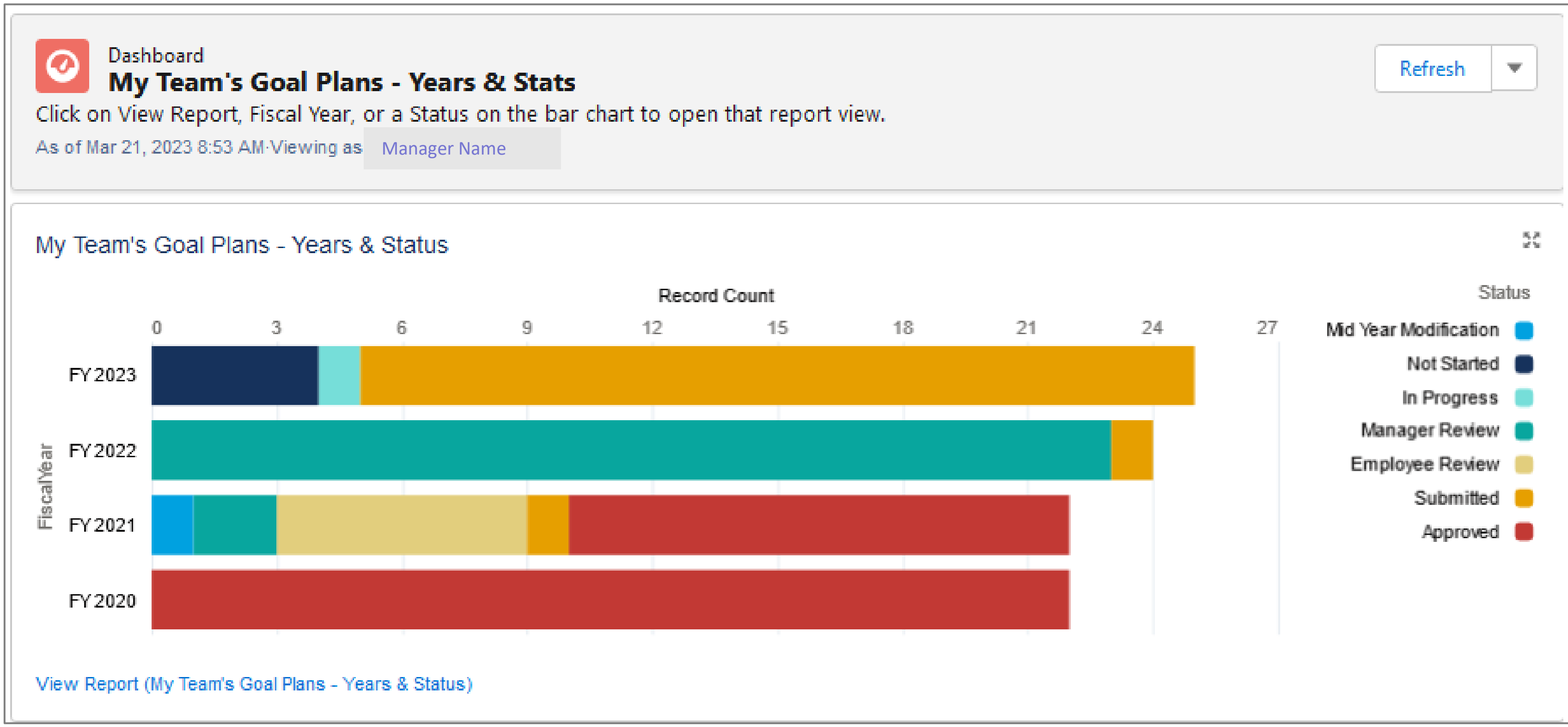
Manager Dashboards – My Team's Goal Plans

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.

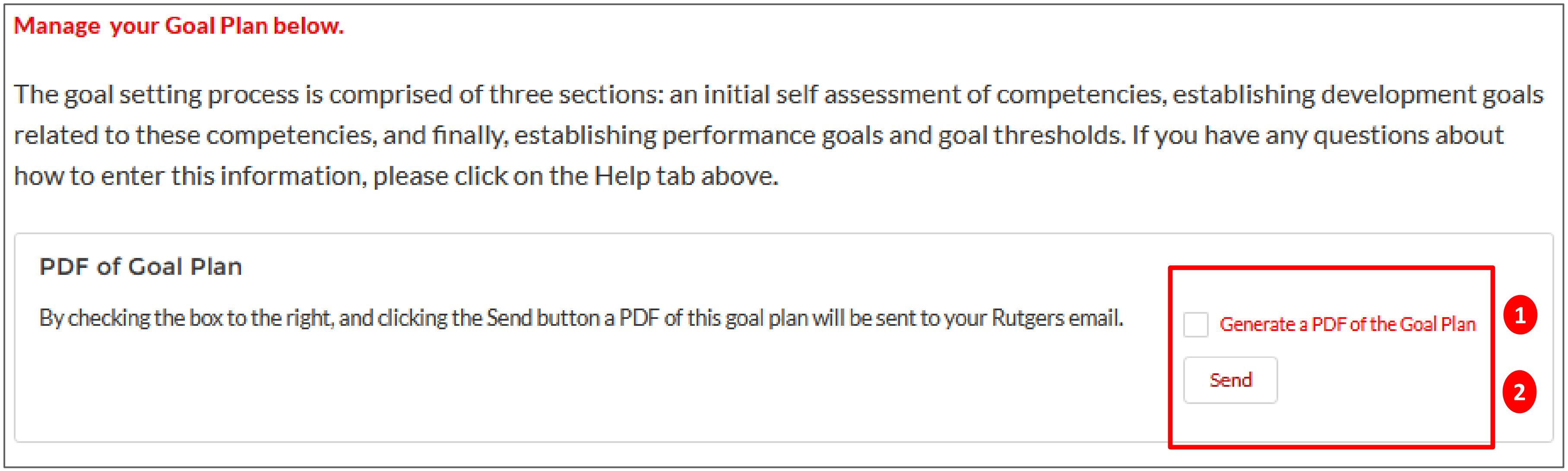
Allows you to see your employees present and past goal plans in all status.

Always be sure to Refresh before viewing



Goal Plan PDF Generator

Located at the top of the Goal Plan



1 **Click Generate a PDF of the Goal Plan**

2 **Click Send (if will go to the Requestor's email)**

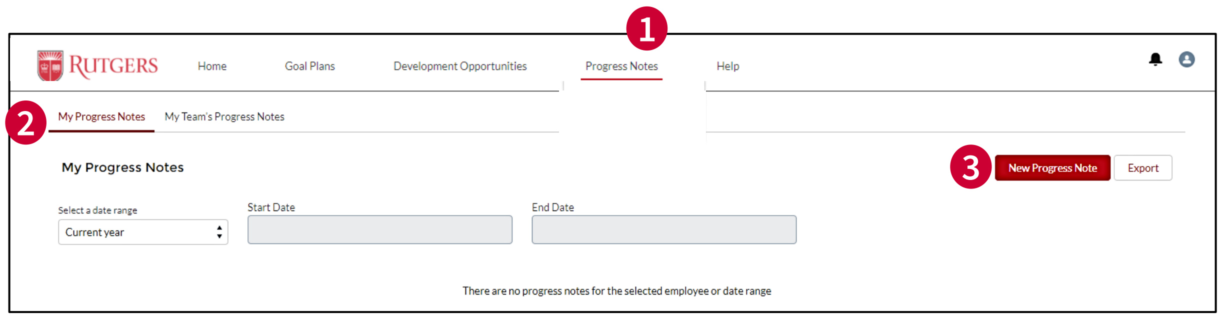
Both the Manager and Employee can request

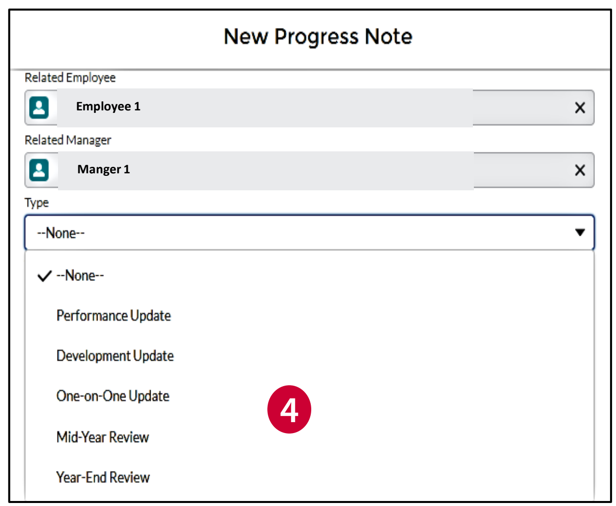
- Goal plan
- All in-line comments
- Progress notes
- Any comments made by the employee and manager

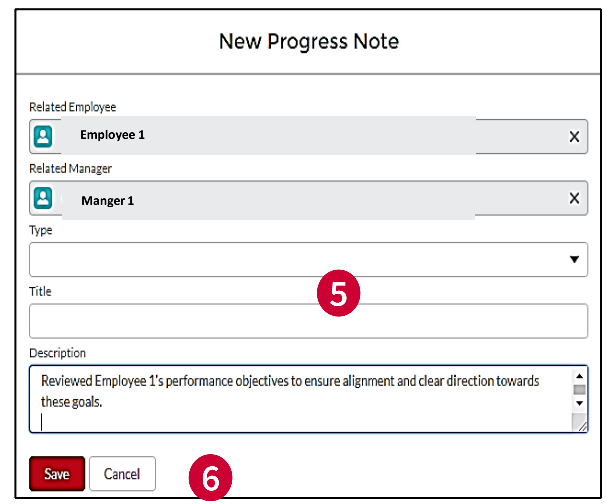
** Not available when the goal plan is in Submitted status. If generating a PDF is needed, you can recall the goal plan or wait until the goal plan is approved.*

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.







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

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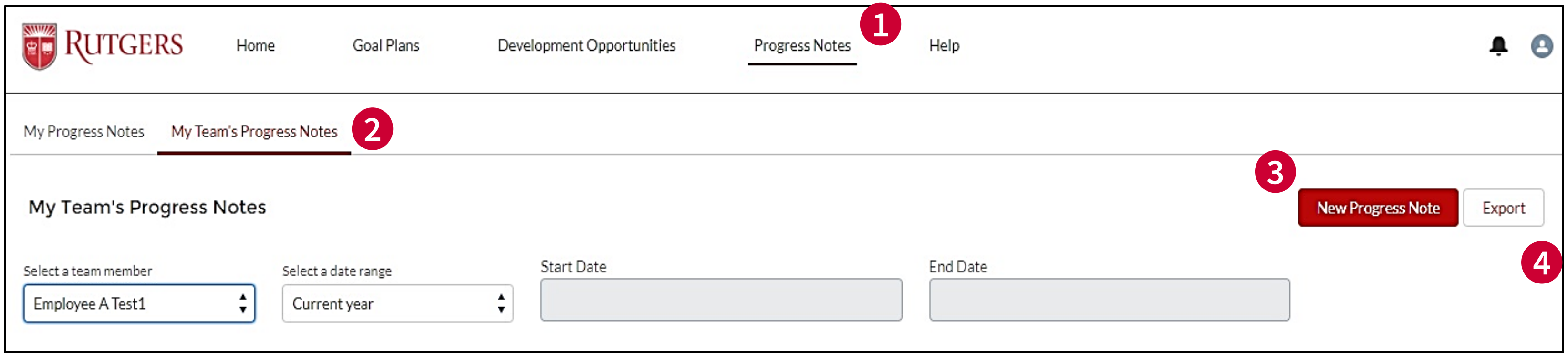
Update Progress Notes
Manager View



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:
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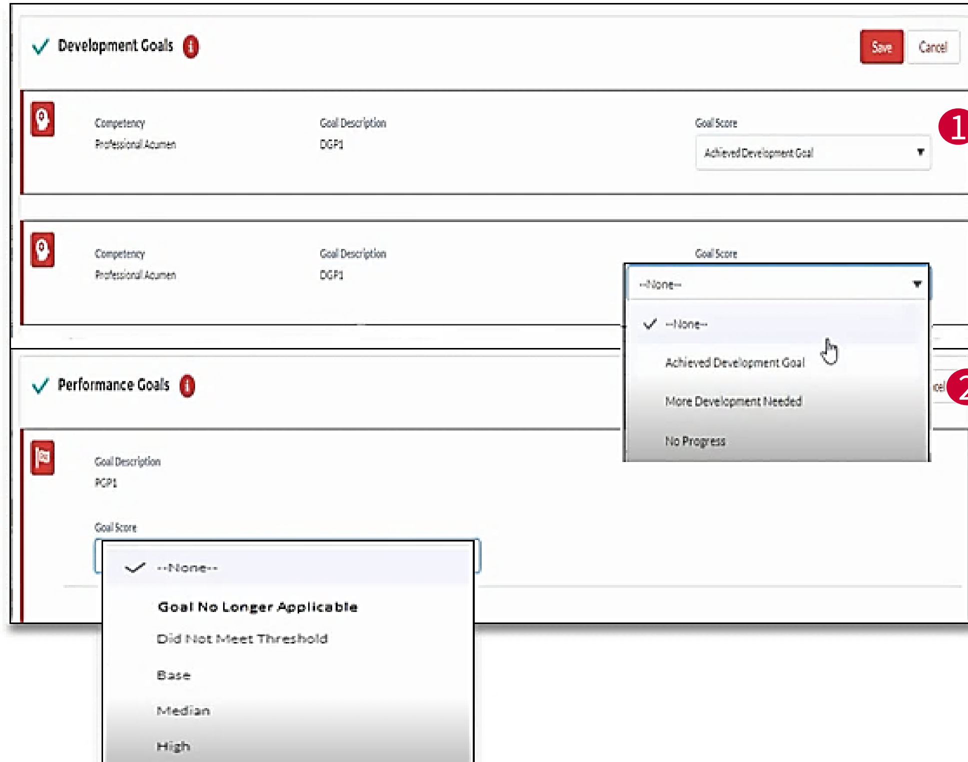
Manager Assigns Performance Ratings

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.



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.

DID NOT MEET THRESHOLD

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

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.

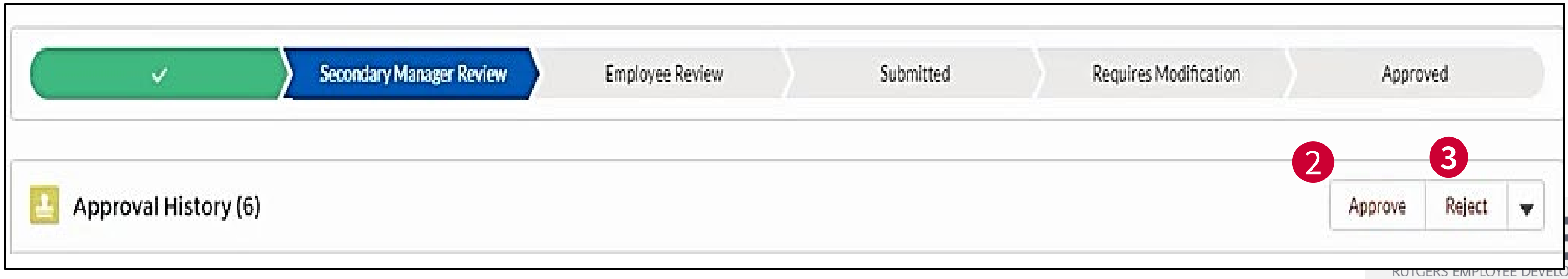
If the Goal Plan requires adjustment, you may send it back to the manager with comments by clicking the Reject Approval button.

Click the link below to access the Goal Plan.

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

Sincerely,

Rutgers University HR Team



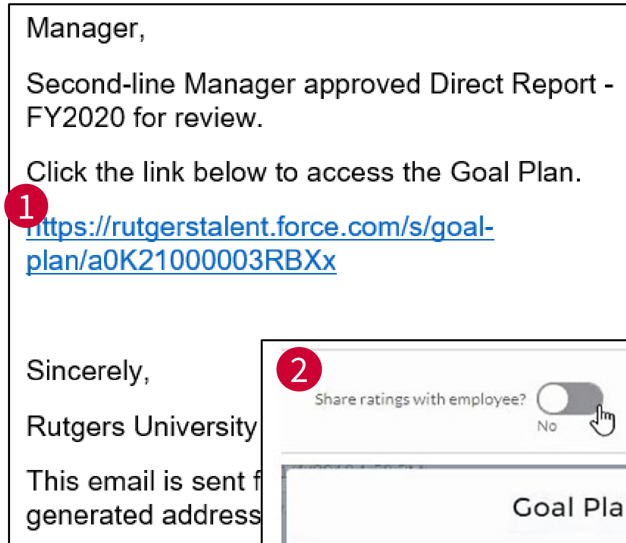
Manager Share Ratings with Employee

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.



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

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.

1

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/a0E3D000000n60o
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

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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.

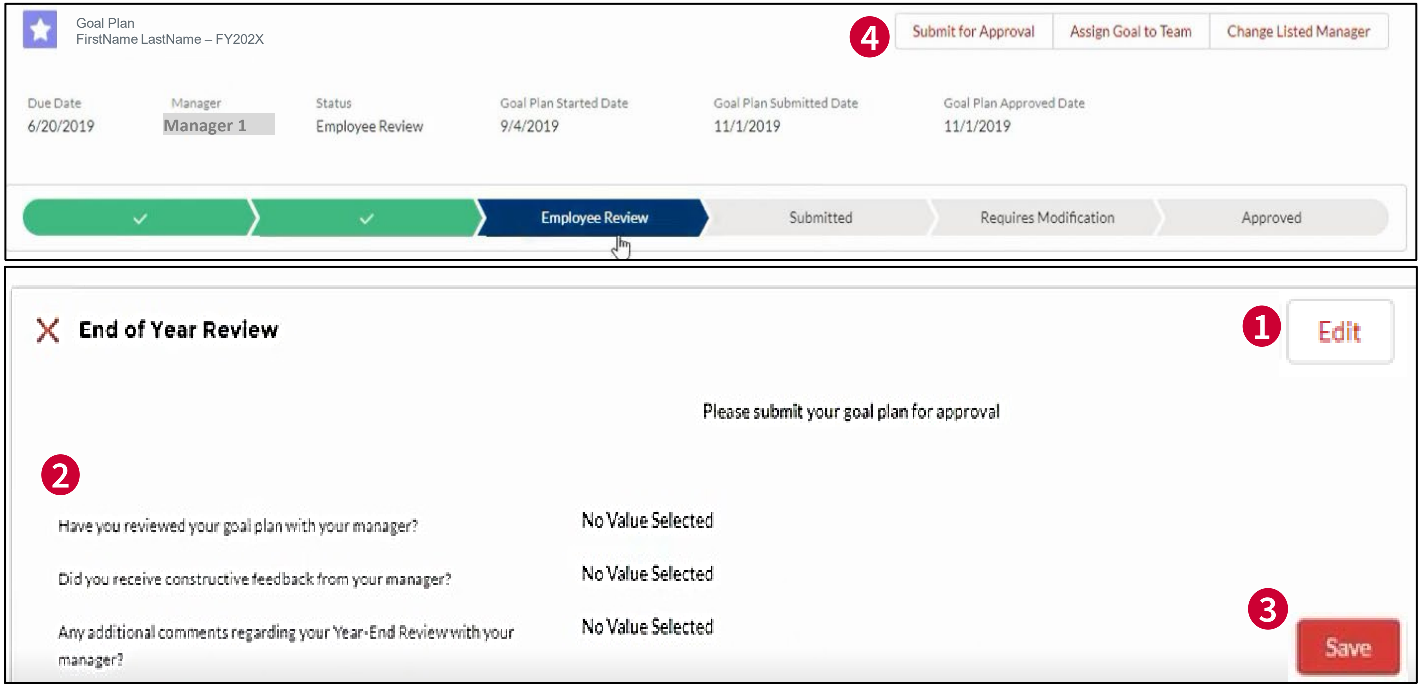
Want to learn more about the system? Click here for the End of Year Review System Guide for Managers.

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**.

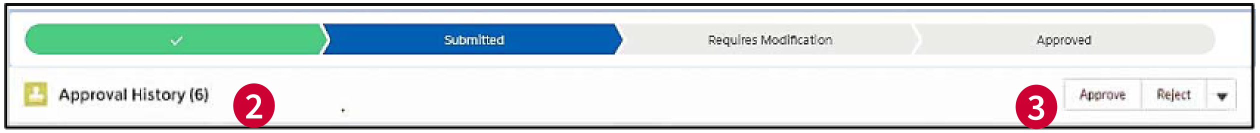


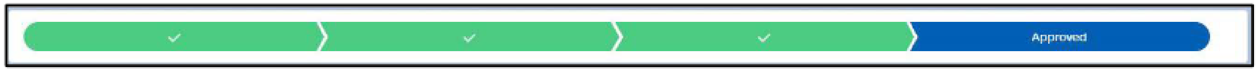
End of Year Final Approval

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.