

Performance Management Mid-Year Process

System User Guide - Employees

#	Mid-Year Review Workflow Overview
1.	Update your goal plan using in-line goal comments (👍) for quick updates and the Progress Notes tab in the navigation bar at the top for longer updates.
2.	Participate in the Mid-Year Review conversation with your manager. Be sure to review your goal plan beforehand, as it will streamline this conversation. During this conversation, you and your manager will review the progress you have made, identify where goals need revision, and plan for extra support where needed.
3.	Revise the goal plan aligned with the outcomes of the Mid-Year Review conversation.
4.	Complete the Mid-Year Review Confirmation, Save , and then Submit for Approval .
5.	Your manager will receive a notification of the submission, review, and approve.
6.	Once approved, the goal plan will lock again until the End of Year cycle.

#	USER: Updating In-line Goal Comments
1.	On the Home page, click Mid-Year Review . Once the page refreshes, scroll down to view your goal plan.
2.	To add in-line goal comments, click the 👍 icon. This should be reserved for short, time-stamped comments only, as in-line goal comments have a character limit and are unable to be edited or deleted.
3.	A box will appear in the middle of your screen. Type your comments in the text box and click Save .
4.	After you save your comment, the pop-up box will close and an orange arrow will appear on the left hand side of your screen. Select "Yes" to notify your manager, and "No thanks" to suppress the notification.

#	USER: Updating Progress Notes
1.	In the navigation bar at the top of your screen, select the Progress Notes tab.
2.	Click on the New Progress Note button. A box will appear in the center of your screen. Fill out all related fields as necessary to best illustrate your mid-year progress. When complete, hit Save .
3.	After saving the progress note, you will have the option to upload files. Click on the <input type="checkbox"/> icon on the right-hand side of the line item. Select Show Details , and a pop-up box will appear. Select the Files tab at the top of the pop-up box and upload any related files.

#	USER: After the Mid-year Review Conversation
1.	Your manager will schedule time with you to review your Mid-Year progress.
2.	Contingent on the outcomes of the Mid-Year conversation, make necessary revisions to your goal plan. You will be able to update existing goals as well as add new goals added. Be sure that the changes you incorporate are aligned with the outcomes of your Mid-Year Review conversation with your manager. If no updates are needed, advance to Submit for Approval .
3.	Note that your goal plan will remain unlocked until submission. Work with your manager to be certain that no changes are needed before selecting Submit for Approval .



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#	USER: Submit for Approval
1.	Before submitting for approval, you will need to complete the Mid-Year Review Confirmation. The questions are “Have you reviewed your goal plan with your manager?” (Yes or N/A), “Did you receive constructive feedback from your manager?” (Yes or N/A), and “Any additional comments regarding your Mid-Year Review with your manager?” (Open Text). Click Save .
2.	The icon next to Mid-Year Review will update from ✖ to ✔. Click Submit for Approval . Note that this action will lock the goal plan. If approved, the plan will remain locked until it opens for End of Year or if your manager rejects the submission for further revision.

#	UNIQUE CIRCUMSTANCES: New Hires Joining Between November and January
1.	Users new to the Performance Management system will need to complete the Initial Goal Setting process by submitting goals for approval to your manager. <u>Remember</u> : Goal plans should be completed within the first 30 days of an employee’s start date, so work with your manager directly on identification of goals.
2.	Once your manager approves the goal plan, the Mid-Year Review cycle will open within 24 hours. To be able to “catch-up” to the current workflow, you must complete the Mid-Year Review Completion questions and click Submit .
3.	It is recommended to have a performance check-in with your manager after your first 90 days to ensure you are tracking on progress towards your goals.



For more tools and resources, visit the Performance Management page
<https://uhr.rutgers.edu/performance-management/home>



Access the “Help” section directly in the Performance Management System
<https://rutgerstalent.force.com/>



Further questions? Contact us.
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