Performance Management Mid-Year Process
System User Guide - Manager

#	Mid-Year Review Workflow Overview
1.	Review the goal plan of your direct reports. Include feedback 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 direct report. Be sure to review your direct report's goal plan beforehand, as it will streamline this conversation. During this conversation, you and your direct report will review the progress you have made, identify where goals need revision, and plan for extra support where needed.
3.	Direct report will revise the goal plan aligned with the outcomes of the Mid-Year Review conversation and **Submit for Approval**.
4.	You will receive a notification of the submission. Ensure the updates made are aligned with the conversation you had together. If it is, click **Approve**. If it is not aligned, click **Reject** so that your direct report can update accordingly.
5.	Once approved, the goal plan will lock again until the End of Year cycle.

#	MANAGER/FACULTY MANAGER: Updating Progress Notes
1.	In the navigation bar at the top of your screen, select the **Progress Notes** tab.
2.	Click on the corresponding direct report's name.
3.	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 progress. When complete, hit **Save**.
4.	After saving the progress note, you will have the option to upload files. Click on the ▾ 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.

#	MANAGER/FACULTY-MANAGER: After the Mid-year Review Conversation
1.	Schedule time with each of your direct reports to review their progress.
2.	Contingent on the outcomes of the Mid-Year Review conversation, your direct report will make necessary revisions to their goal plan. As their manager, you will be able to update existing goals as well as add new goals added.
3.	If no changes are needed, your direct report can advance to Submit.

#	MANAGER/FACULTY-MANAGER: Goal Plan Approval at Mid-Year Review
1.	The manager receives an email and alert via notification bell once a direct report's goal plan is submitted for approval.
2.	Review the goal plan, click **Approve** or **Reject.**
3.	If approved, the plan is locked until it opens again for the End of Year cycle.
4.	If rejected, the goal plan will unlock to allow for revision. Rejected goal plans will need to be re-submitted for approval.

#	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 new hire directly on identification of goals.
2.	Once you approve their goal plan, the Mid-Year Review cycle will open for your new hire within 24 hours. To be able to "catch-up" to the current workflow, they must complete the Mid-Year Review Confirmation and submit once again.
3.	Continue to have your regular 1:1 meetings, knowing that you may still need to modify the goals as the new employee continues to acclimate to their role. It is recommended to have a performance check-in with your direct report after their first 90 days to ensure they are tracking on progress towards their 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.
performancemanagement@hr.rutgers.edu

Learn more about best practices for performance management on LinkedIn Learning

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