Performance Management: Goal Setting Process

#	Accepting Your Manager's Team Request
1.	From your email box notification, click the provided URL, Rutgers Shibboleth login will appear Enter your NetID and Password. When the page opens, click Approve box.
OR	On the Home page notice the notification bell upper right corner. Click to access the notification about joining the team. Click Approve to accept.

#	Log in Process
1.	Launch either Chrome, Safari or Firefox browser Do not use Internet Explorer or Edge
2.	Type in the address field: https://rutgerstalent.force.com/
3.	Set your default browser to Safari, Chrome or Firefox to receive system notifications

#	Accessing Your Goal Plan
1.	From the HOME page access your goal plan by clicking the red Goal Setting icon
2.	Or, access your Goal Plan by clicking your name in the My Goal Plans section

#	Accessing Your Competency Self-Assessment
1.	Scroll down, under Initial Self-Assessment, click Edit
2.	Click **the Competency Rating** dropdown menu and after reviewing, select your Self Rating
3.	Read the **Description and Key Behaviors** to understand the competency behaviors
4.	Click each of the **>** symbol to review each rating description for each competency. Select your rating.
5.	Scroll down and repeat the process for each competency
6.	Click the **Save** button to capture your entries

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#	Creating Your Development Goals
1.	Click the **+Goal** button to create a new **Development Goal**
2.	Click the Competency dropdown menu to select the competency associated with the Development Goal
3.	Populate the **Development Activity field** with your Development Goal. *Review the materials for creating S.M.A.R.T goals
4.	Click **Save** to capture your entry

#	Creating Your Performance Goals
1.	Click **+Goal** button to create a new **Performance Goal**
2.	All Goals are visible by your manager's manager and up the reporting structure
3.	Populate the **Performance Goal field**
4.	Populate the three associated **Thresholds**
5.	Click the **Save** button to capture your entries
6.	Click **+Goal** button to create a new **Performance Goal**

#	Submitting the Goal Plan for Approval
1.	Ensure that there is a **green check** mark next to the **Initial Self-Assessment** indicating it is complete
2.	Ensure that there is a green check mark next to the **Development Goals** indicating it is complete
3.	Ensure that there is a green check mark next to the **Performance Goals** indicating it is complete
4.	Click the **Submit for Approval** button, **locking** the Goal Plan preventing further edits
5.	Before the Goal Plan is sent to the manager, read the statement indicating that you have reviewed and understand the goal plan and your objectives. Check the **"I Agree"** check box
6.	Click **Next**
7.	A **green check mark** will appear indicating successful submission of the Goal Plan
8.	Click **Finish** to submit the Goal Plan to your manager

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Tracking your Progress

#	Adding Comments to Goals
1.	Managers and employees can record results towards **Development Goals** utilizing the **Comments** function. Click the **red Speech Bubbles** icon to launch the **Goal Comments** function
2.	Managers and employees can record results towards **Performance Goals** utilizing the **Comments** function. Click the **red Speech Bubbles** icon to launch the **Goal Comments** function
3.	Populate the **Add New Comments** field with the information to associate the update with the goal
4.	Click **Save**
5.	The comment will be recorded with a date stamp and will be maintained with additional comments from either the manager or employee
6.	An **orange tab** will appear on the left side of the screen. Click the tab to send a notification to the employee or manager that a new comment has been created

#	Adding Comments to Progress Notes
1.	In the **Global Navigation**, click **Progress Notes**
2.	Click the **My Progress Notes** to view **existing** or **create** a new Progress Note
3.	Click the **New Progress Note** to create a new Progress Note
4.	Select which type of Progress Note you would like to create: **Performance Goal Update** **Development Goal Update** **One on One Update** **Mid-Year Review** **End-of-Year Review**
5.	Populate the **Title** and the **Description** fields
6.	Click **Save** to record your entry

#	Uploading Documents to Progress Notes and Exporting
1.	To **upload** a file associated with the Progress Note, click the **Files** link
2.	Click the **Upload Files** button and browse your computer to locate the file
3.	Click the **Close** button to save your update or click the **Edit** button to make changes to the **Progress Note**.
4.	To **Export** the Progress notes for your records or for meeting preparation click the **My Progress Notes** link
5.	Or to **Export** the Progress note for your employee, click the **My Team's Progress Notes** link
6.	Select the **Date range** to locate the Progress Note by date
7.	Select the **Progress note**
8.	Click the **Export** button

Professional Development

#	Accessing Professional Development
1.	From the **Global Navigation**, click the **Development Opportunities** link
2.	Identify which **competency** is associated with the development goal you will be addressing
3.	Locate the training you will be launching
4.	Click the **link** to launch the course
5.	When the site opens enter Click **Sign in**
6.	Under Sign in with your organizational portal type: “Rutgers.edu”
7.	Rutgers Shibboleth page will appear, use your NetID and Password. Click Login
8.	Use the Search to review the over 6,000 sessions to locate more learning opportunities

Resources

Performance Management Website

Visit: **https://discover-uhr.rutgers.edu/performance-management/home**

Or Under “Help” in the Application**:** **https://rutgerstalent.force.com/**

Assistance:

Email: **performancemanagement@hr.rutgers.edu**