RUTGERS

Performance Management: Manager's Functions to the Goal Setting Process

#	Designating You Are a Manager (Opening Manager Functions)
1.	By default, everyone is assigned an employee profile If you are a manager of non-union employees, click the toggle to enable the manager functions
2.	Once selected, the toggle will indicate that you are a manager and turn red
3.	*** If you do not supervise non-aligned (non-union) employees, leave the manager function unselected**

#	Adding Direct Reports
1.	In the My Team section, click the Search link. When activated, the Search function will turn red
2.	Enter the employee's name in the "**Search for People"** field
3.	Click the Search button
4.	Select the employee you wish to add as your direct report by clicking the toggle next to their name A notification will be sent to the employee seeking their confirmation that you are their manager The toggle will remain pending until the employee accepts the request ***Upon acceptance by the employee, the toggle will turn red and you can proceed with assigning them goals.**
5.	Click Save

#	Pushing a PERFORMANCE GOAL to an employee
1.	Managers can share Performance Goals with employees Ensure the manager is accessing their goal plan by identifying their name next to the star
2.	Click the Assign Goal to Team button
3.	Click the radio button associated with the Performance Goal to be shared by the manager with the employee. Click Next
4.	Click the Check Box next to the employee's name that the Goal will be shared. Click Next
5.	The Manager can update the Performance Goal to make it specific to the desired employee's performance outcome
6.	Update the Base Threshold
7.	Update the Median Threshold
8.	Update the High Threshold
9.	Click Next. Click Finish to record the entry
10.	Verify the Shared Performance Goal by reviewing the Goal Description in the employee's goal plan says (Shared by Manager) will appear next to the goal

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#	Assigning an INDIVIDUAL DEVELOPMENT OR PERFORMANCE GOAL to an Employee
1.	Access the employee's Goal Plan by clicking the Goal Plan link in the Global Navigation or Click the Employee's name in the My Team's Goal Plan section
2.	Ensure that you are accessing the employee's goal plan by verifying the name next to the star. Notice that the manager cannot update the employee's self-appraisal
3.	**Assign a Development Goal** to the employee by clicking the +Goal button to create a new goal (see next page) 1. Populate the employee's Development Goal by selecting the appropriate competency from the Competency dropdown menu 2. Populate the Development Activity with the Development Goal 3. Click Save to record your entry
4.	**Assign a Performance Goal** by clicking the +Goal button to create a new goal (see the page following the next) 1. Populate the Performance Goal field 2. Populate the three associated Thresholds 3. Click the Save button to capture your entries
5.	Identify that the Goal has been assigned by verifying that the goal description include the text **(Shared by Manager)**

#	Approving or Rejecting Goal Plans
1.	From the My Team' Goal Plans section, access the employee's goal plan and review it for accuracy and completeness. Locate the Approval History section and click the Approve button if the Goal Plan is acceptable
2.	Locate the Approval History section and click the Reject button if the Goal Plan is not acceptable This will unlock the Goal Plan allowing edits by the manager and employee If Rejected, the approval process must be repeated
3.	If rejected, the manager must populate the Comments field with direction for the employee to make changes
4.	Click the Reject button to send the Goal Plan back to the employee

#	Adding Comments to Employee Goals
1.	Managers and employees can record results towards **Development Goals** utilizing the Comments function From the employees Goal Page, 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 From the employees Goal Page, 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

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#	Creating Employee Progress Notes
1.	Click the My Team’s Progress Notes to view existing or create a new Progress Note
2.	From the Select a Team Member Dropdown menu, select the employee’s name
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. (Continue on to the next section to upload a document.)

#	Uploading Documents and Exporting Employee Progress Notes
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

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

Call: Teri 848-932-3979