Performance Management:
Manager's User Guide to Goal Setting

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Review the Employee's Functions in Performance Management: Goal Setting before using this guide. It will walk through all the initial processes you will need prior to using this section.

Manager's Functions in Performance Management: Goal Setting

Manager's Functions: Building Your Team

Build Your Team: Designating that You Are a Manager

Are you a manager of 1 or more non-aligned employees?
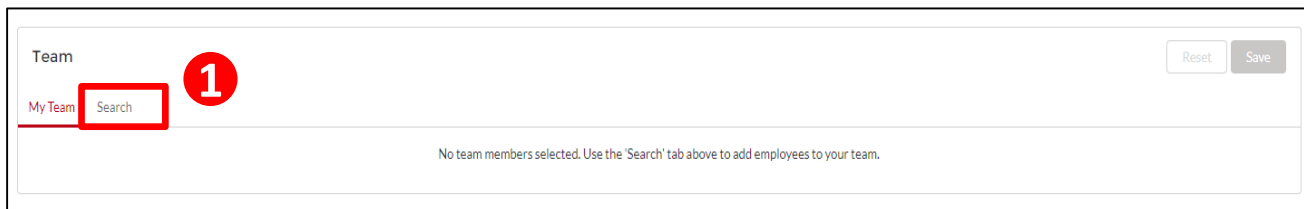
①

No, I am not a manager

Are you a manager of 1 or more non-aligned employees?

②
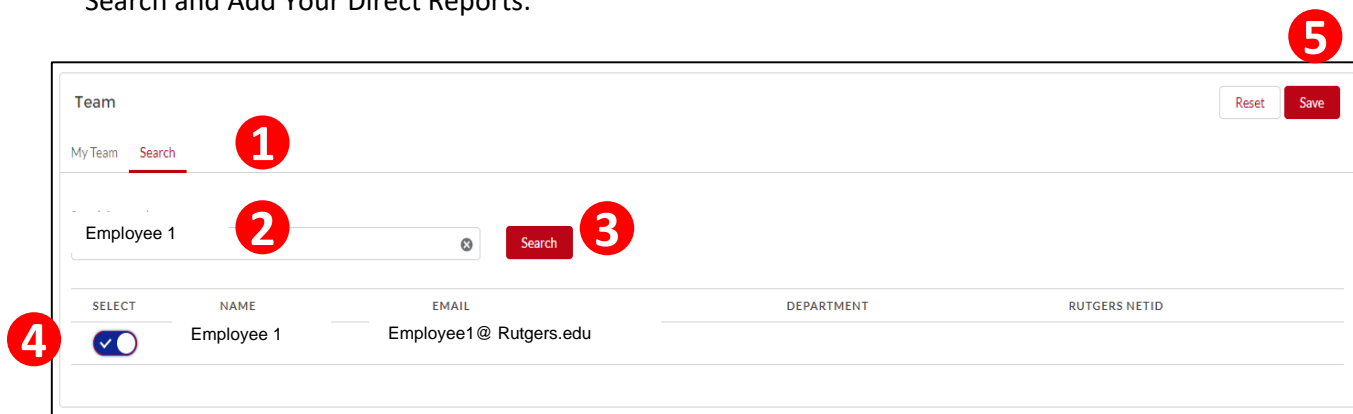
Yes, I am a manager

#	Process
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**
	* If you do not supervise non-aligned (non-union) employees, leave the manager function unselected

Build Your Team: Add Direct Reports

Locate the Team Selection Tool:

Team

My Team Search **1**

Reset Save

No team members selected. Use the 'Search' tab above to add employees to your team.

Search and Add Your Direct Reports:

5

Team

My Team Search **1**

Reset Save

Employee 1 **2** ⊗ **3** Search

SELECT	NAME	EMAIL	DEPARTMENT	RUTGERS NETID
4 🔵	Employee 1	Employee1@ Rutgers.edu		

#	Process
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 blue until the employee accepts the request Upon acceptance by the employee, the toggle will turn **red**
5.	Click **Save**

Manager's Functions: Sharing Goals

Goal Setting: Pushing a Performance Goal to an Employee

1

Goal Description

By April 2020, Employee 1 will audit 1,000 vendor contracts to ensure each agreement meets the university security requirements.

Base Threshold

By April 2020 audit 1,000 vendor contracts

Median Threshold

By April 2020 audit 1,500 vendor contracts

High Threshold

By April 2020 audit 1,750 vendor contracts

#	Process
1.	Managers can share **Performance Goals** with employees
2.	Ensure the manager is accessing **their** goal plan by identifying **their name** next to the **star**
3.	Click the **Assign Goal to Team** button

RUTGERS   Home   Goal Plans   Development Opportunities   More ⌄

Review your Goal Plan below.

⭐ **Goal Plan**
Manager 1 – FY2020   **2**

3

Submit for Approval   Assign Goal to Team   Request Update to Manager

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
3/22/2019	**Leader 1**	ot Started			

Goal Setting: Pushing a Performance Goal to an Employee

#	Process
1.	Click the **radio button** associated with the **Performance Goal** to be shared by the manager with the employee
2.	Click **Next**
3.	Click the **Check Box** next to the employee's name that the Goal will be shared
4.	Click **Next**

Goal Setting: Pushing a Performance Goal to an Employee

Assign Goal to Team

Use the boxes below to adjust the goal if needed as well as the thresholds. The adjustments will be assigned to each employee you selected previously.

Goal Description

① By April 2020, Employee 1 will audit 1,000 vendor contracts to ensure each agreement meets the university security requirements.

Base Threshold

② By April 2020 audit 1,000 vendor contracts

Median Threshold

③ By April 2020 audit 1,500 vendor contracts

High Threshold

④ By April 2020 audit 1,750 vendor contracts

Previous | Next ⑤

#	Process
1.	The Manager can update the Performance Goal to make it specific to the desired employee's performance outcome
2.	Update the **Base Threshold**
3.	Update the **Median Threshold**
4.	Update the **High Threshold**
5.	Click **Next**
6	Click **Finish** to record the entry

Assign Goal to Team

✓ Goal have been updated for the following employees:

Employee 1

Previous | Finish ⑥

Goal Setting: Pushing a Performance Goal to an Employee

#	Process
1.	Verify the **Shared** Performance Goal by reviewing the Goal Description The language **(Shared by Manager)** will appear next to the goal

Goal Setting: Assigning Individual Employee Goals

#	Process
1.	Access the employee's Goal Plan by clicking the **Goal Plan link** in the Global Navigation
2.	Or Click the Employee's name in the **My Team's Goal Plan** section

Goal Setting: Assigning Individual Employee Goals

#	Process
1.	Ensure that you are accessing the employee's goal plan by verifying the name next to the **star**
2.	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)
4.	Assign a **Performance Goal** by clicking the **+Goal** button to create a new goal (see the page following the next)

Goal Setting: Assigning Employee Development Goals
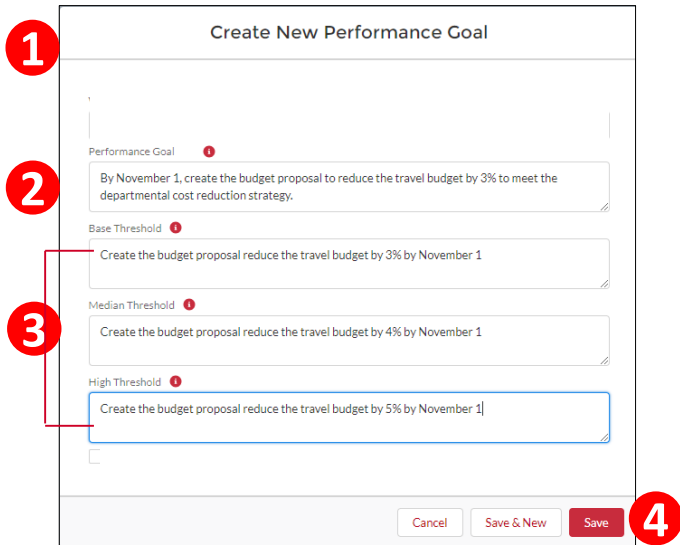
#	Process
1.	Populate the employee's **Development Goal** by selecting the appropriate competency from the Competency dropdown menu
2.	Populate the **Development Activity** with the Development Goal
3.	Click **Save** to record your entry
4.	Identify that the Development Goal has been assigned by verifying that the goal description include the text **(Shared by Manager)**

Goal Setting: Assigning Employee Performance Goals

1 **Create New Performance Goal**

Performance Goal ❗
2 By November 1, create the budget proposal to reduce the travel budget by 3% to meet the departmental cost reduction strategy.
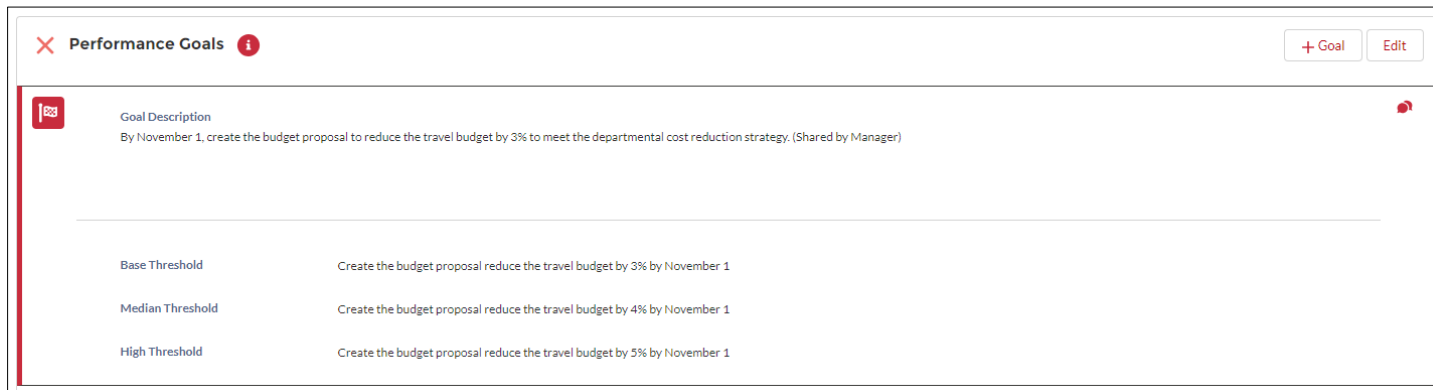
Base Threshold ❗
Create the budget proposal reduce the travel budget by 3% by November 1

Median Threshold ❗
3 Create the budget proposal reduce the travel budget by 4% by November 1

High Threshold ❗
Create the budget proposal reduce the travel budget by 5% by November 1|

Cancel   Save & New   **Save** **4**

#	Process
1.	**All Goals** are visible by your manager's manager and up the reporting structure
2.	Populate the **Performance Goal field**
3.	Populate the three associated **Thresholds**
4.	Click the **Save** button to capture your entries
5.	Identify that the **Performance Goal** has been assigned by verifying that the goal description include the text **(Shared by Manager)**

✕ **Performance Goals** ℹ   + Goal   Edit

Goal Description
By November 1, create the budget proposal to reduce the travel budget by 3% to meet the departmental cost reduction strategy. (Shared by Manager)

Base Threshold   Create the budget proposal reduce the travel budget by 3% by November 1

Median Threshold   Create the budget proposal reduce the travel budget by 4% by November 1
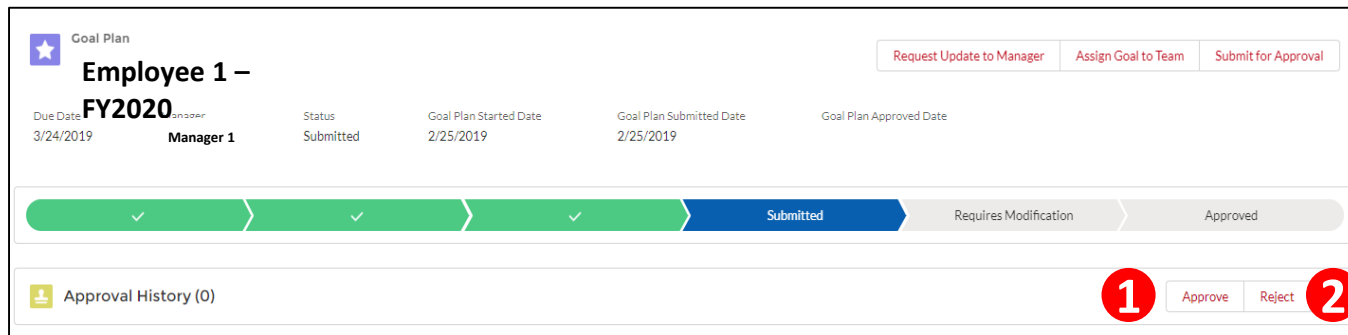
High Threshold   Create the budget proposal reduce the travel budget by 5% by November 1

Manager's Functions: The Approval Process

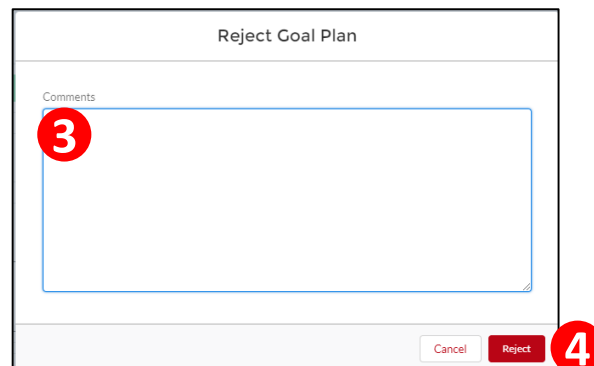# **Approvals:** Approving or Rejecting Goal Plans

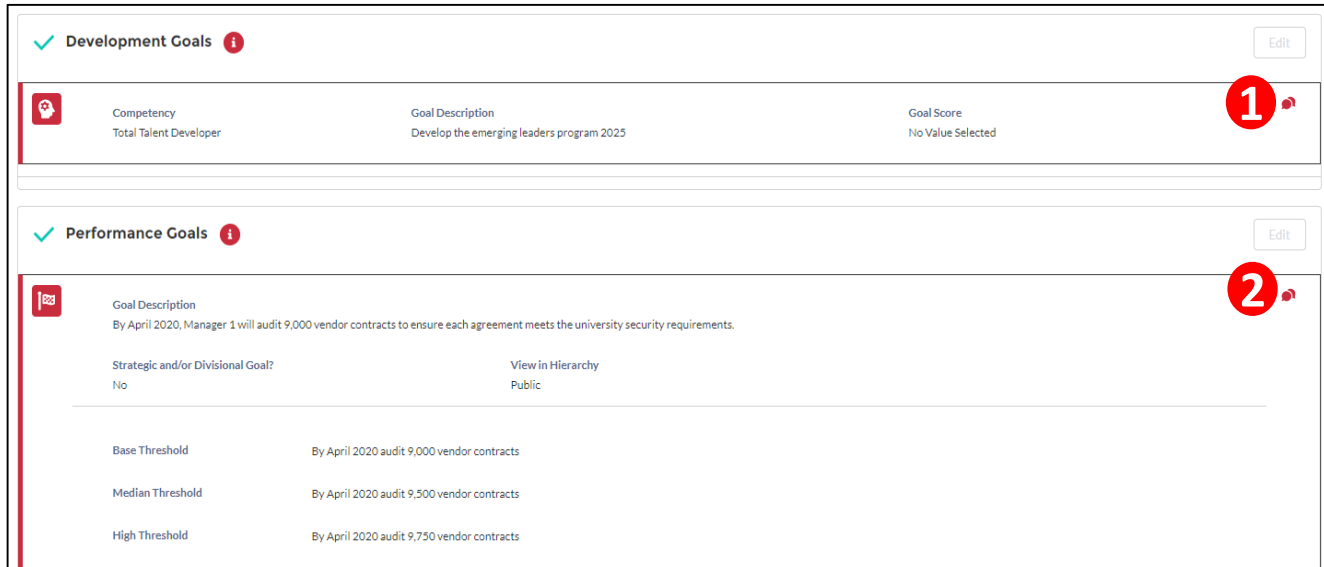| #	Process
1.	From the **My Team' Goal Plans** section, **access** the employee's goal plan and review it for accuracy and completeness Locate the **Approval History** section and **click** the **Approve** button if the Goal Plan is acceptable
2.	Locate the **Approval History** section and **click** 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

Progress Notes and Professional Development

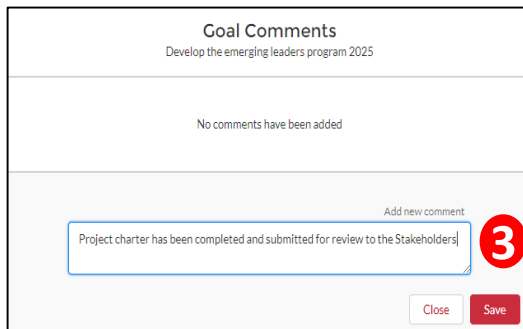# **Progress:** Adding Comments to Goals

#	Process
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

Progress: Creating Employee Progress Notes
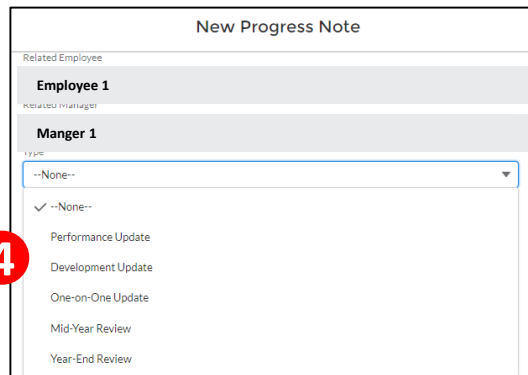
#	Process
1.	Click the **My Team's Progress Notes** to view existing or create a new Progress Note
2.	From the **Select a Team Member** Dropdown menu, select the employee's name
3.	Click the **New Progress Note** to create a new **Progress Note**
4.	Select which type of **Progress Note** you would like 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
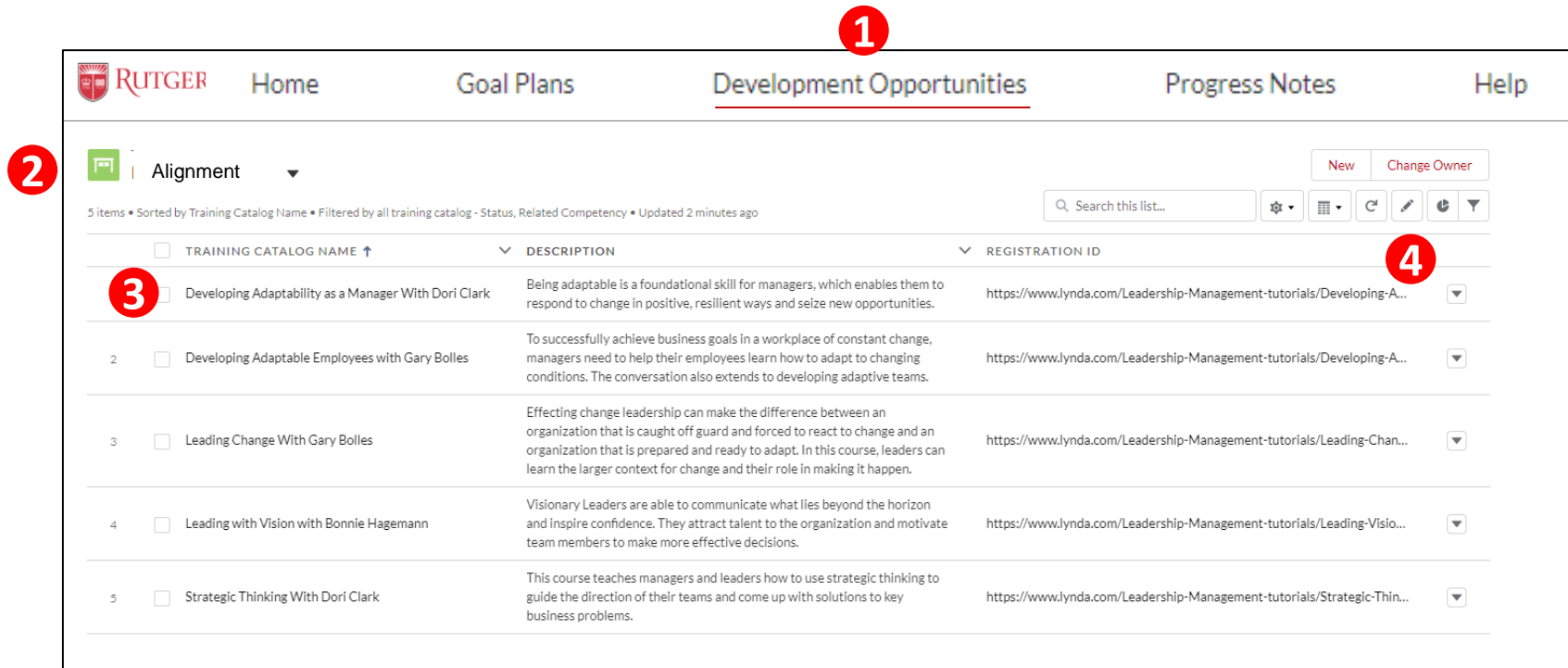
Progress: Your Progress Notes (Uploading documents and Exporting)
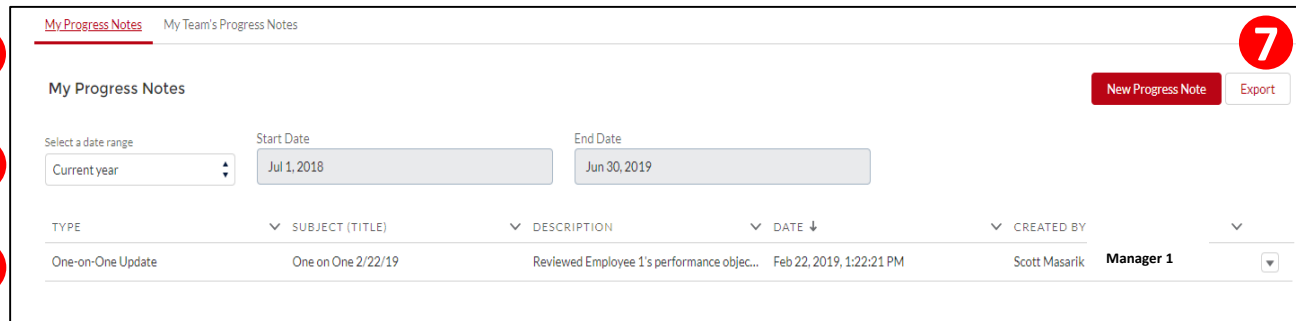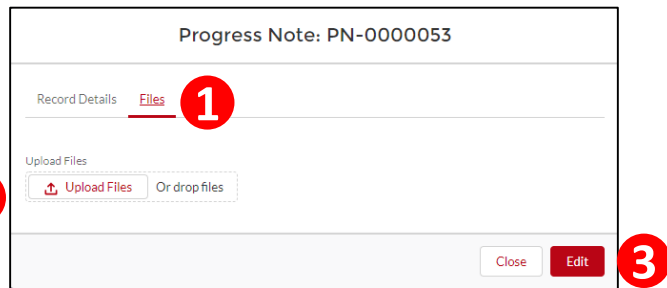
#	Process
1.	To **upload** a file associated with the Progress Note, click the **Files** link
2.	Click the **Upload Files** button and browse your computer to locate the file
3.	Click the **Close** button to save your update or click the **Edit** button to make changes to the **Progress Note**.
4.	To **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

#	Process
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

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