



**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.

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# Manager's Functions: Building Your Team

## Build Your Team: Designating that You Are a Manager

**1**

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

No, I am not a manager

**2**

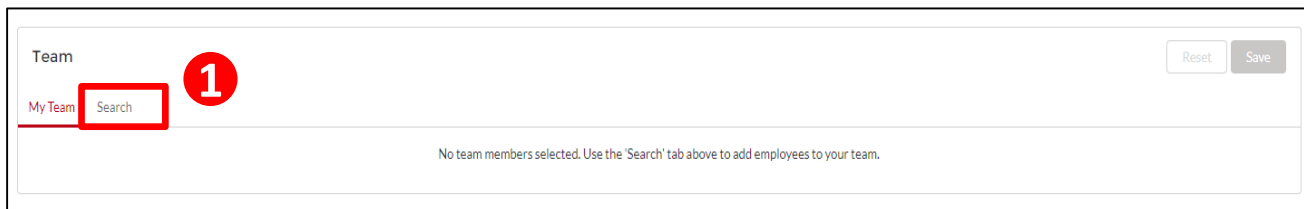
Are you a manager of 1 or more non-aligned employees?

Yes, I am a manager

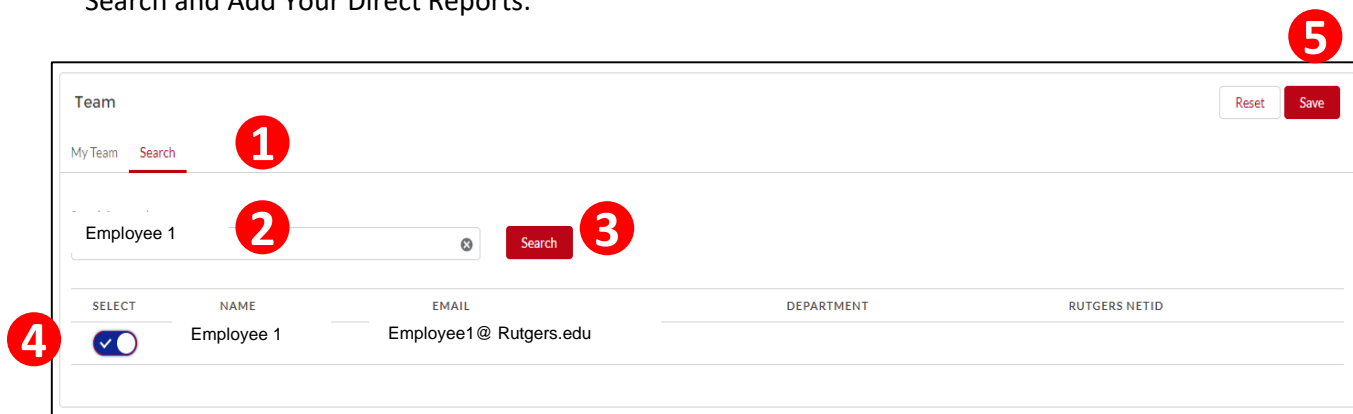
#	Process
1.	By default, everyone is assigned an employee profile  If you are a manager of non-union employees, click the <b>toggle</b> to enable the manager functions
2.	Once selected, the <b>toggle</b> will indicate that you are a manager and turn <b>red</b>
	<b>* If you do not supervise non-aligned (non-union) employees, leave the manager function unselected</b>

# Build Your Team: Add Direct Reports

Locate the Team Selection Tool:



Search and Add Your Direct Reports:



SELECT	NAME	EMAIL	DEPARTMENT	RUTGERS NETID
<input checked="" type="checkbox"/>	Employee 1	Employee1@ Rutgers.edu		

#	Process
1.	In the <b>My Team</b> section, click the <b>Search</b> link  When activated, the <b>Search</b> function will turn <b>red</b>
2.	Enter the employee's name in the <b>Search For People</b> field
3.	Click the <b>Search</b> button
4.	Select the employee you wish to add as your direct report by clicking the <b>toggle</b> next to their name  A notification will be sent to the employee seeking their confirmation that you are their manager  The <b>toggle</b> will remain blue until the employee accepts the request  Upon acceptance by the employee, the toggle will turn <b>red</b>
5.	Click <b>Save</b>





## 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 <b>Performance Goals</b> with employees
2.	Ensure the manager is accessing <b>their</b> goal plan by identifying <b>their name</b> next to the <b>star</b>
3.	Click the <b>Assign Goal to Team</b> button

RUTGERS Home Goal Plans Development Opportunities More

Review your Goal Plan below.

★ Goal Plan **Manager 1 – FY2020**

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	<b>Leader 1</b>	Not Started			

# Goal Setting: Pushing a Performance Goal to an Employee

**Assign Goal to Team**

---

Choose the goal from the goal's below that you would like to send to one or more of your employees.

You will have the option to adjust the goal prior to assigning it to your employee.

You will not be able to push to employees's Goal Plans that have already been submitted. Additional goals can be added to the Goal Plan by the employee. Changes to the Goal Plan will need to be submitted to the manager for final approval

Performance Goals

By April 2020, Manager 1 will audit 9,000 vendor contracts to ensure each agreement meets the university security requirements.

Next

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

**Assign Goal to Team**

---

Please select the employees you would like to pass this goal to on your team.

Employees

Employee 1

Employee 2

Previous
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

5

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

**Assign Goal to Team**

---

✔ Goal have been updated for the following employees:

Employee 1

6

# Goal Setting: Pushing a Performance Goal to an Employee

✓ Performance Goals i

---

Goal Description  
 By April 2020, Employee 1 will audit 1,000 vendor contracts to ensure each agreement meets the university security requirements. (Shared By Manager) 1

Strategic and/or Divisional Goal?  
 Yes

---

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.	Verify the <b>Shared</b> Performance Goal by reviewing the Goal Description  The language ( <b>Shared by Manager</b> ) will appear next to the goal

# Goal Setting: Assigning Individual Employee Goals

**1**

RUTGERS		Home	Goal Plans	Development Opportunities	Progress Notes	Help
<b>MY GOAL PLANS</b>						
GOAL PLAN NAME	STATUS	MANAGER	GOAL PLAN STARTED DATE			
Manager 1	In Progress	Leader 1	2/21/2019			
View All						
<b>MY TEAM'S GOAL PLANS</b>						
GOAL PLAN NAME	GOAL PLAN STARTED DATE	GOAL PLAN SUBMITTED DATE	STATUS			
Employee 1			Not Started			
Employee 2	2/21/2019		In Progress			

**2**

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

# Goal Setting: Assigning Individual Employee Goals

Goal Plan

## Employee 1 – FY2020 1

[Submit for Approval](#)
[Assign Goal to Team](#)
[Request Update to Manager](#)

Due Date  
3/23/2019

Manager  
**Manager 1**

Status  
Not Started

Goal Plan Started Date

Goal Plan Submitted Date

Goal Plan Approved Date

Not Started
In Progress
Past Due
Submitted
Requires Modification
Approved

Approval History (0)

✕ Initial Self Assessment

	Professional	Technical	
✕ Leading Change	No Value Selected	✕ Leading People	No Value Selected
✕ Leading Performance	No Value Selected	✕ Technical/Occupational Acumen	No Value Selected

2
Edit

✕ Development Goals 3

No development goals have been created

+ Goal
Edit

✕ Performance Goals 4

No performance goals have been created

+ Goal
Edit

#	Process
1.	Ensure that you are accessing the employee's goal plan by verifying the name next to the <b>star</b>
2.	Notice that the manager <b>cannot</b> update the employee's self appraisal
3.	Assign a <b>Development Goal</b> to the employee by clicking the <b>+Goal</b> button to create a new goal (see next page)
4.	Assign a <b>Performance Goal</b> by clicking the <b>+Goal</b> button to create a new goal (see the page following the next)

# Goal Setting: Assigning Employee Development Goals

Create New Development Goal

\* Competency  
Leading Change

Development Activity i  
By April 2020, Employee 1 will attend the Process Development class to prepare for the implementation of the Service Center.

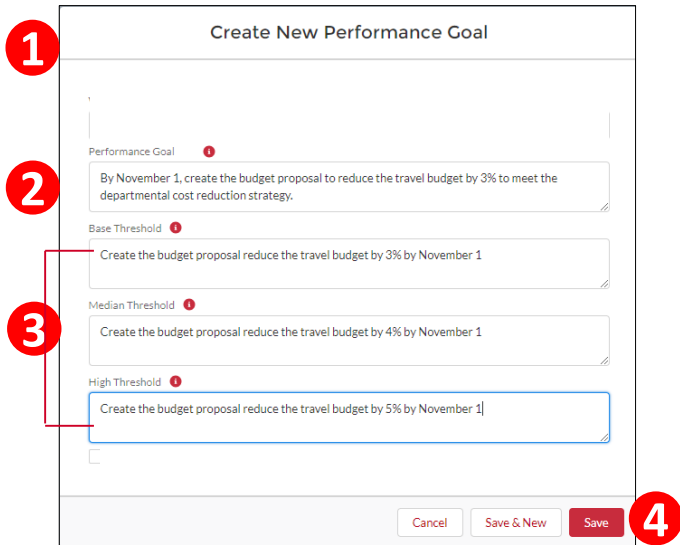
Cancel
Save & New
Save

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

✓ **Development Goals** i
+ Goal
Edit

<span style="background-color: red; color: white; padding: 2px 5px;">+</span>	<p style="font-size: small;">Competency</p> <p>Leading Change</p>	<p style="font-size: small;">Goal Description</p> <p>By April 2020, Employee 1 will attend the Process Development class to prepare for the implementation of the Service Center. (Shared by Manager)</p>	<p style="font-size: small;">Goal Score</p> <p>No Value Selected</p>
---	---	---	--

# Goal Setting: Assigning Employee Performance Goals



**1** Create New Performance Goal

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

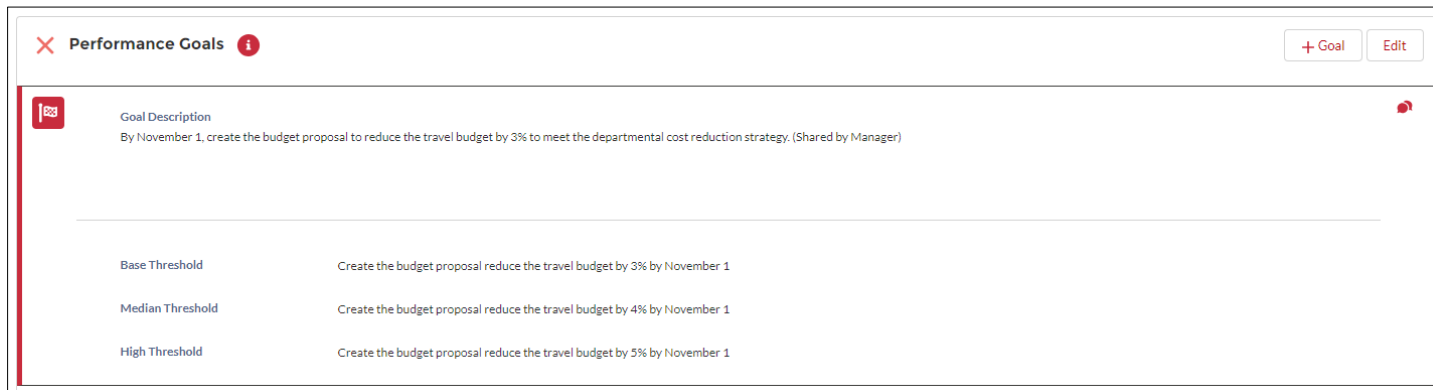
**3** Base Threshold  
Create the budget proposal reduce the travel budget by 3% by November 1

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]

**4** Cancel Save & New Save

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



**Performance Goals** + 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

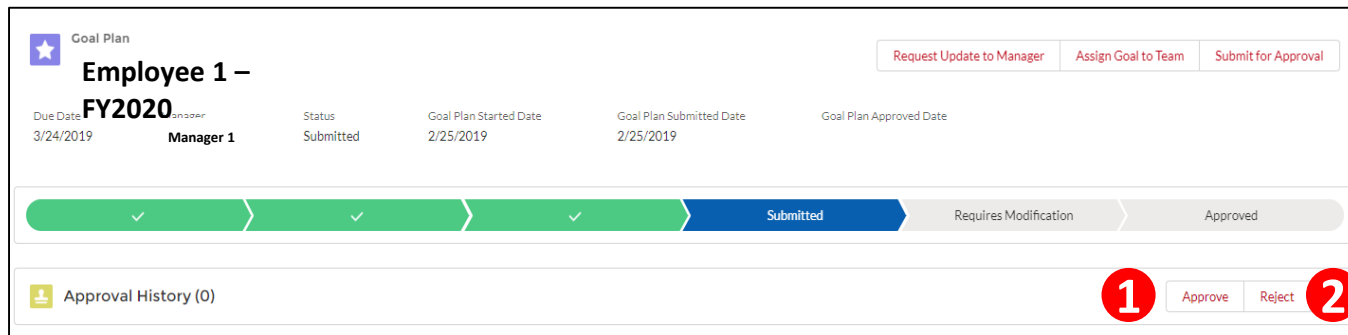
High Threshold Create the budget proposal reduce the travel budget by 5% by November 1





## **Manager's Functions: The Approval Process**

# Approvals: Approving or Rejecting Goal Plans



Goal Plan

**Employee 1 –**

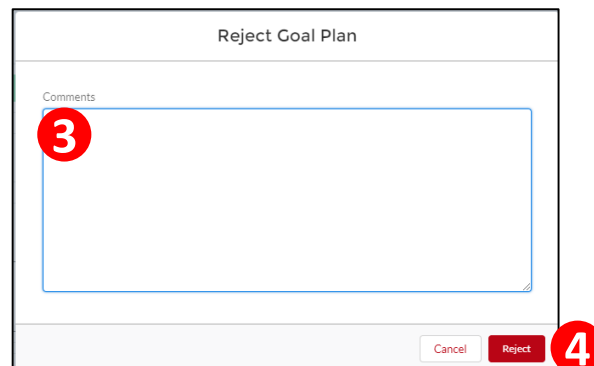
**FY2020**

Due Date: 3/24/2019 | Manager: Manager 1 | Status: Submitted | Goal Plan Started Date: 2/25/2019 | Goal Plan Submitted Date: 2/25/2019 | Goal Plan Approved Date:

Request Update to Manager | Assign Goal to Team | Submit for Approval

Progress: Submitted (Active) | Requires Modification | Approved

Approval History (0) | **1** Approve | **2** Reject



Reject Goal Plan

Comments

**3**

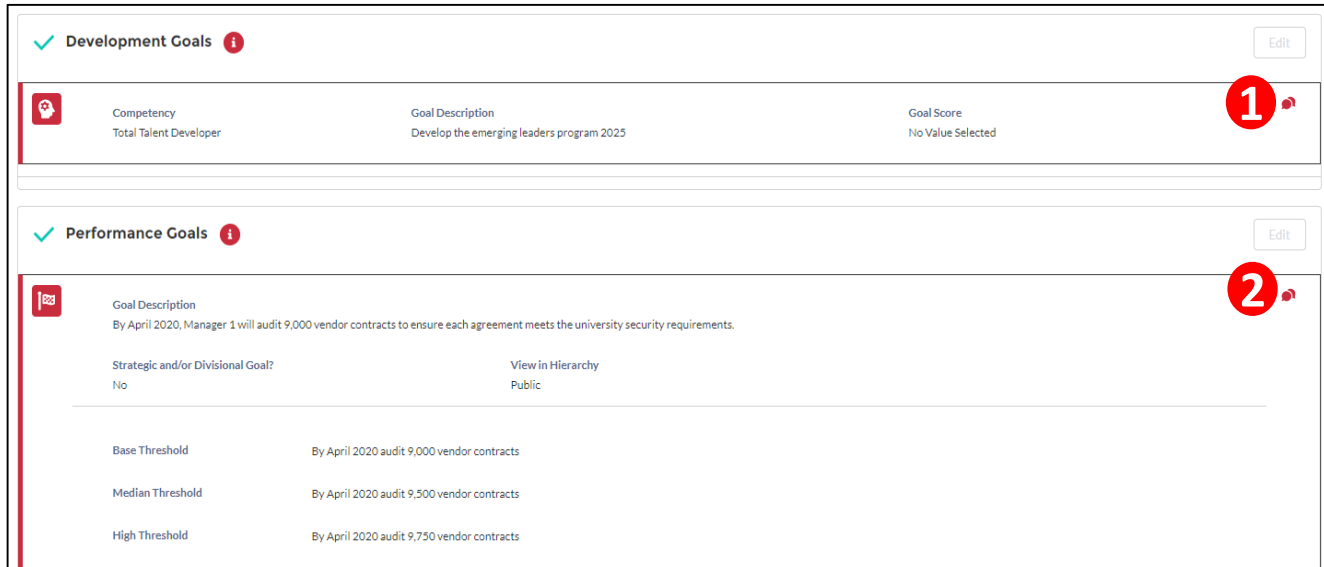
Cancel | **4** Reject

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



# **Progress Notes and Professional Development**

# Progress: Adding Comments to Goals

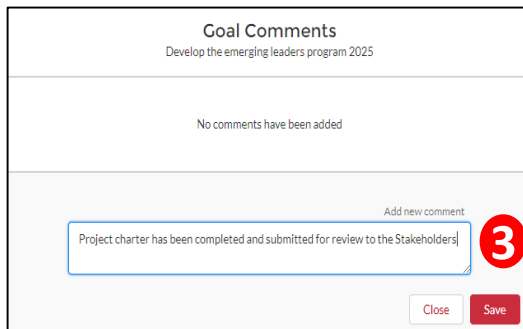


**Development Goals**

- Competency: Total Talent Developer
- Goal Description: Develop the emerging leaders program 2025
- Goal Score: No Value Selected

**Performance Goals**

- Goal Description: By April 2020, Manager 1 will audit 9,000 vendor contracts to ensure each agreement meets the university security requirements.
- Strategic and/or Divisional Goal?: No
- View in Hierarchy: Public
- Base Threshold: By April 2020 audit 9,000 vendor contracts
- Median Threshold: By April 2020 audit 9,500 vendor contracts
- High Threshold: By April 2020 audit 9,750 vendor contracts



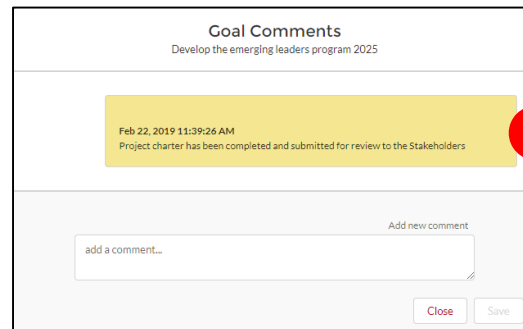
**Goal Comments**  
Develop the emerging leaders program 2025

No comments have been added

Add new comment

Project charter has been completed and submitted for review to the Stakeholders

Close Save



**Goal Comments**  
Develop the emerging leaders program 2025

Feb 22, 2019 11:39:24 AM  
Project charter has been completed and submitted for review to the Stakeholders

add a comment...

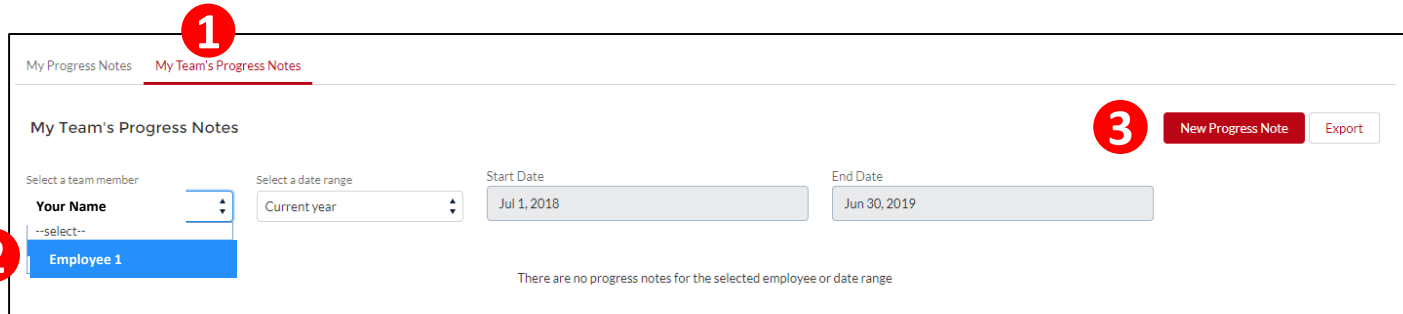
Add new comment

Close Save



#	Process
1.	Managers and employees can record results towards <b>Development Goals</b> utilizing the <b>Comments</b> function  Click the <b>red Speech Bubbles</b> icon to launch the <b>Goal Comments</b> function
2.	Managers and employees can record results towards <b>Performance Goals</b> utilizing the <b>Comments</b> function  Click the <b>red Speech Bubbles</b> icon to launch the <b>Goal Comments</b> function
3.	Populate the <b>Add New Comments</b> field with the information to associate the update with the goal
4.	Click <b>Save</b>
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 <b>orange tab</b> 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



My Progress Notes **My Team's Progress Notes**

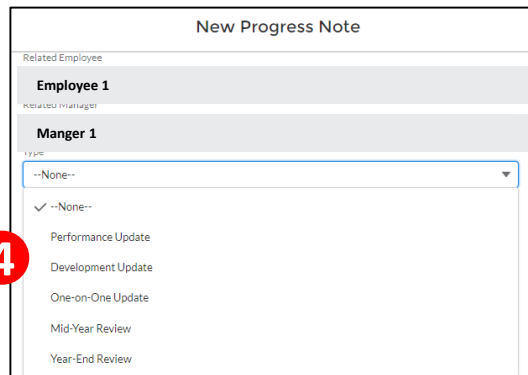
My Team's Progress Notes 3 **New Progress Note** Export

Select a team member: **Your Name**  **Employee 1** (2)

Select a date range:  Start Date:  End Date:

There are no progress notes for the selected employee or date range

#	Process
1.	Click the <b>My Team's Progress Notes</b> to view existing or create a new Progress Note
2.	From the <b>Select a Team Member</b> Dropdown menu, select the employee's name
3.	Click the <b>New Progress Note</b> to create a new <b>Progress Note</b>
4.	Select which type of <b>Progress Note</b> you would like to create: <b>Performance Goal Update</b> <b>Development Goal Update</b> <b>One on One Update</b> <b>Mid-Year Review</b> <b>End-of-Year Review</b>
5.	Populate the <b>Title</b> and the <b>Description</b> fields
6.	Click <b>Save</b> to record your entry



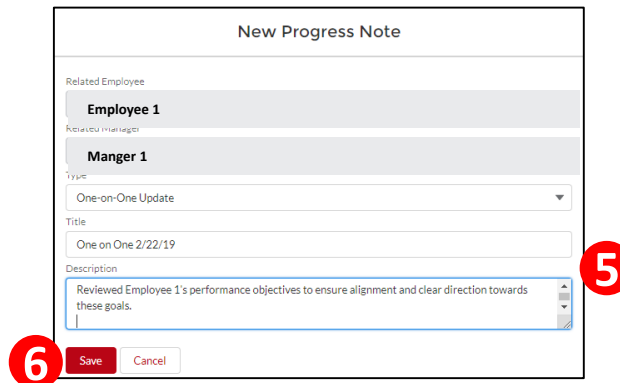
New Progress Note

Related Employee: **Employee 1**

Reviewed Manager: **Manger 1**

Type:

- None--
- Performance Update
- Development Update
- One-on-One Update
- Mid-Year Review
- Year-End Review



New Progress Note

Related Employee: **Employee 1**

Reviewed Manager: **Manger 1**

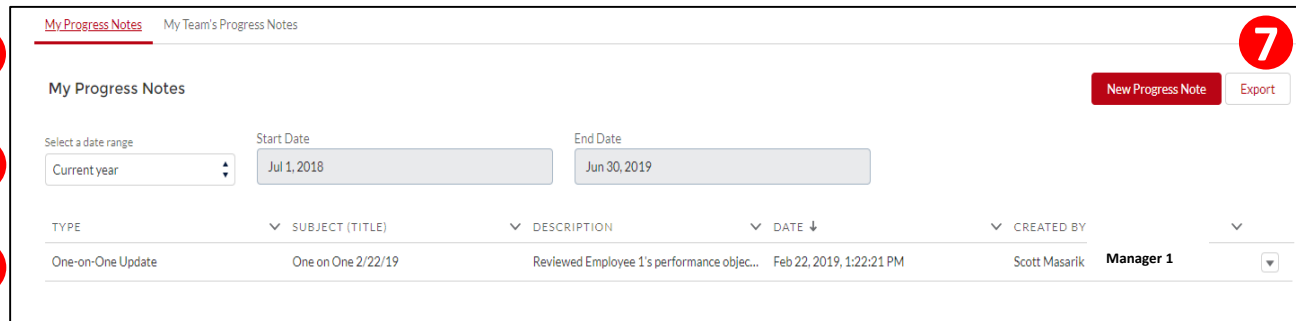
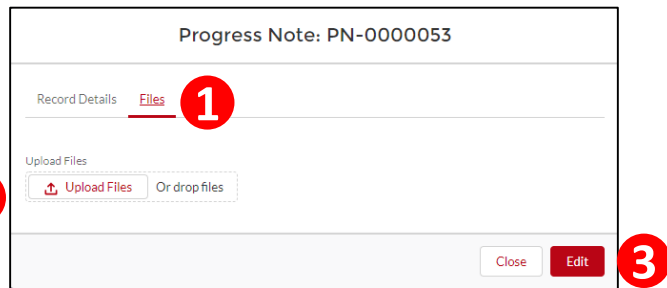
Type:

Title:

Description:

6 **Save** Cancel

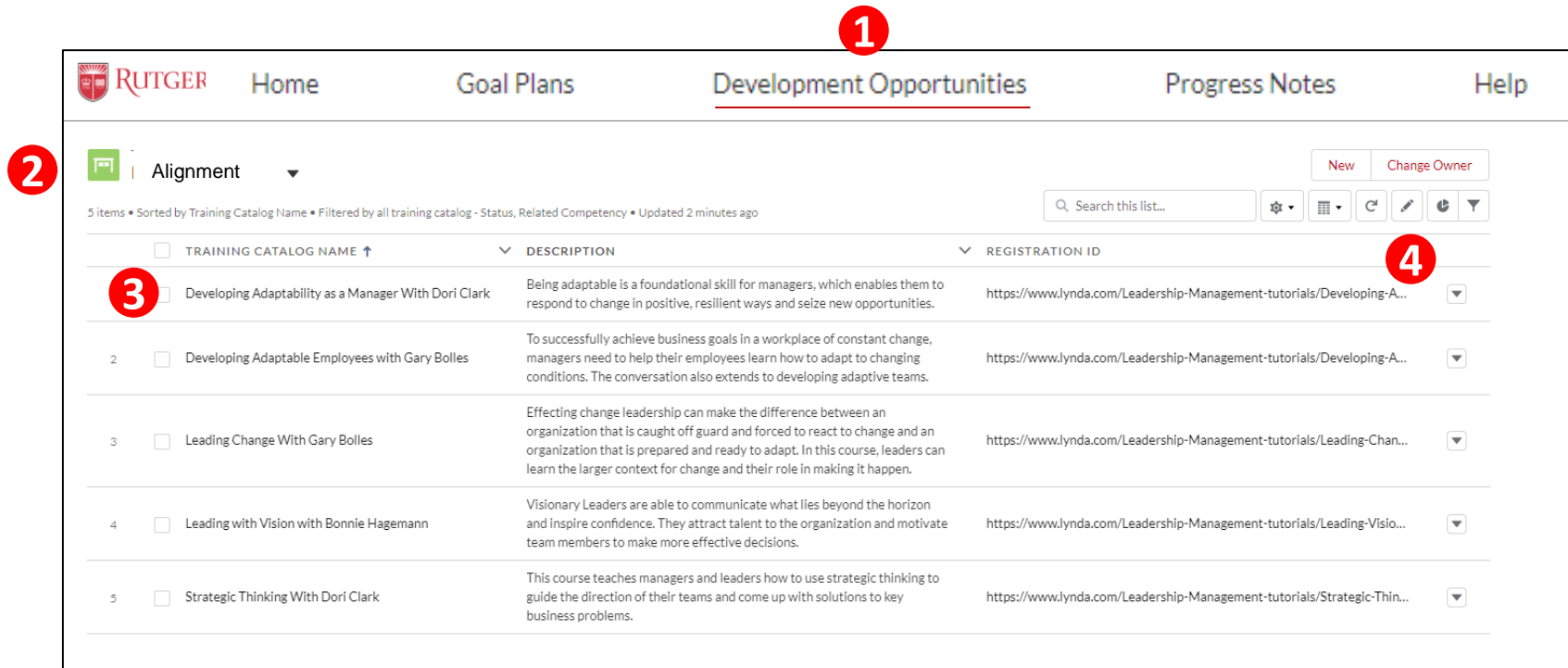
# Progress: Your Progress Notes (Uploading documents and Exporting)



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



# Professional Development



The screenshot shows the 'Development Opportunities' page in the Rutgers system. It features a navigation bar with 'Home', 'Goal Plans', 'Development Opportunities', 'Progress Notes', and 'Help'. Below the navigation bar, there is a section for 'Alignment' with a search bar and several icons. A table lists five training items with columns for 'TRAINING CATALOG NAME', 'DESCRIPTION', and 'REGISTRATION ID'. Each row has a dropdown arrow in the 'REGISTRATION ID' column.

#	Process
1.	From the <b>Global Navigation</b> , click the <b>Development Opportunities</b> link
2.	Identify which <b>competency</b> is associated with the development goal you will be addressing
3.	Locate the training you will be launching
4.	Click the <b>link</b> 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](mailto:performancemanagement@hr.rutgers.edu)

Call: Teri 848-932-3979