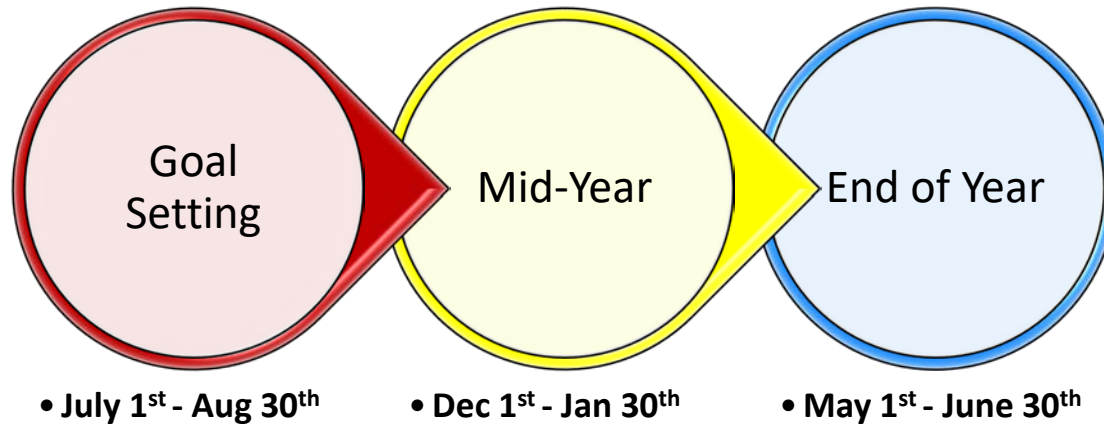# Manager - The Mid-Year Process

Understanding the Performance Management: Mid-Year Review

Table of Contents

Review the tutorials on the Performance Management website before using this guide. It will walk through all pages you see here. This guide shares the employee's actions to support the Manager's understanding of the functions.
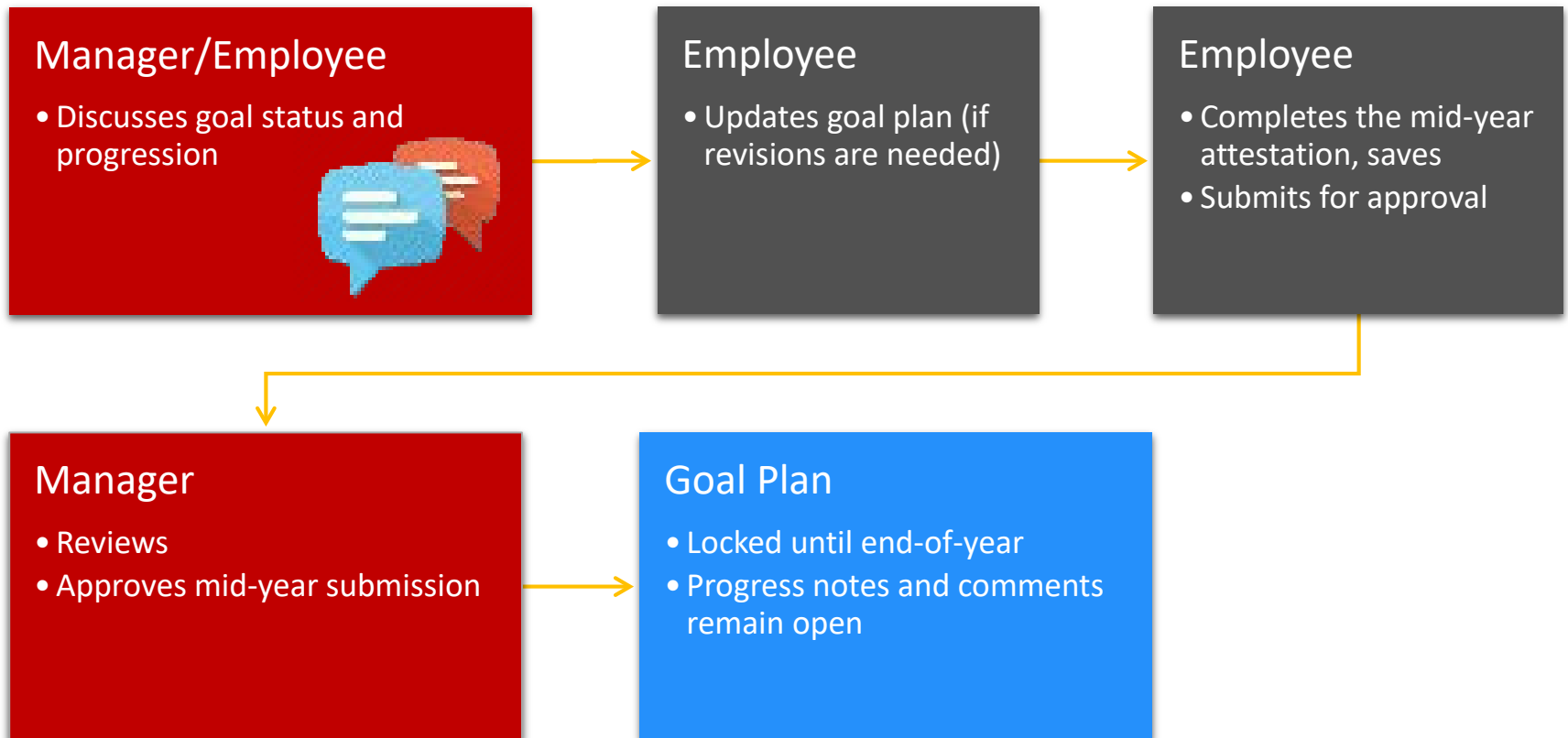
The Mid-Year Process – Open Dates

Goal Setting	Mid-Year	End of Year
• July 1st - Aug 30th	• Dec 1st - Jan 30th	• May 1st - June 30th

The Mid-Year Process

- User has been or now needs to update their Progress Notes and their In-line Goal Progress

Manager/Employee
- Discusses goal status and progression

Employee
- Updates goal plan (if revisions are needed)

Employee
- Completes the mid-year attestation, saves
- Submits for approval

Manager
- Reviews
- Approves mid-year submission

Goal Plan
- Locked until end-of-year
- Progress notes and comments remain open

Updating the In-line Goals – Your Report should do this before meeting

1. On the Home page.
2. Click Mid-Year Review
3. Click the conversation bubble graphic to update the in-line goal progress. Do this for all your goals
4. When done, use the orange arrow conversation button on the left to send your Manager your goal plan update, then meet to discuss.

Updating the Progress Notes – Manager and Report can do this

1. User or Manager clicks on Progress Notes
2. Use dropdown to identify update Type
3. Give it a Title
4. Add the Description
5. Click Next
6. Click Upload in the next frame to add a scanned/pdf certificate, or related supporting document.

Both Managers and Staff Can See All Progress Notes Created.

The Mid-Year Review – Manager and Direct Report Meeting

- Discuss the progress of the Development Goals
- Discuss the progress of the Performance Goals
- ASK:
  - ✓ Are they still relevant to your role?
  - ✓ Do they still support the work of the unit?
  - ✓ To reach completion, are more resources or support needed?
  - ✓ Do they need to be Edited, or Add New Goals? **This is the time to do it!**
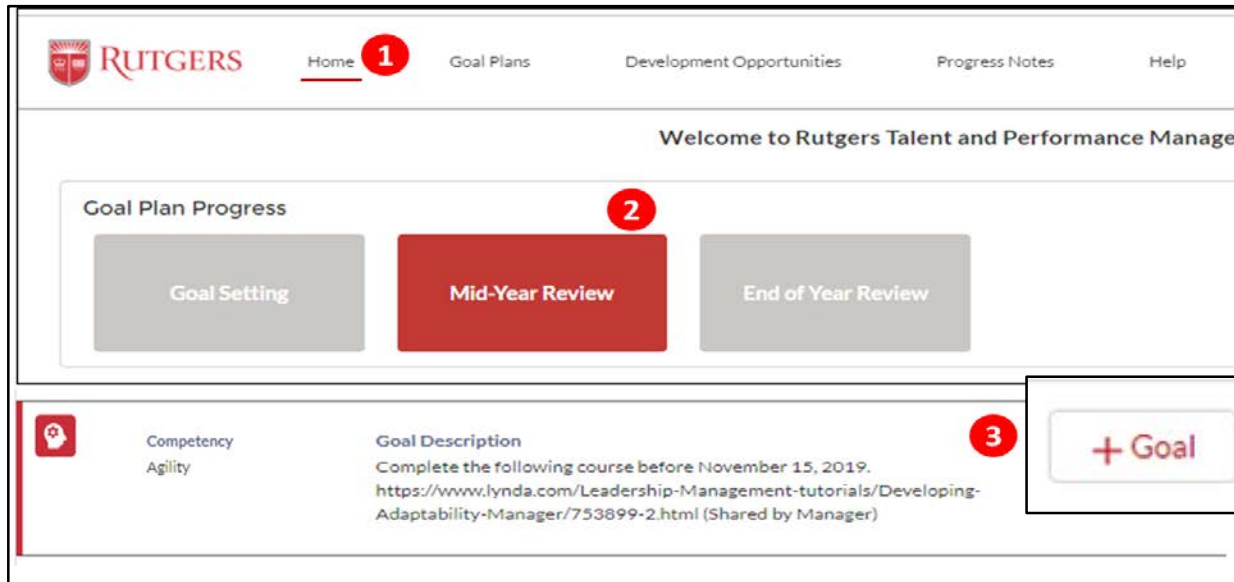
To Edit or Add Goals
1. Click Home
2. Click the Red Mid-Year box
3. Scroll to Goal to be Edited, Click Edit or click + Goal to make a new goal.
4. Be sure to Save

Review the 3-minute User-Goal Setting tutorial on the website, if needed.

Mid-Year Review Attestation – Employee will complete

After meeting, the Manager or employee can make any adjustments to the goal plan discussed. Follow the Goal Setting tutorials if you have questions. Be sure to Save your work.

Employee will complete 1. 2. and 3. by clicking the drop-down, click Yes. Add a comment if they choose.
4. Click Save.

Employee Submits

1. Notice the RED X at Mid-Year Review has turned to Green
2. Click Submit For Approval

The Mid-Year Review - Manager does the Approval

1. The Manager will receive an email and a notice in the Notification Bell noting the submission.
Clicking on the email link or the bell will open the Goal plan for review, approval or to send back for revision.

1

2. Review the goal plan and any changes, if you agree click approve. If further editing is required, you must reject to re-open the plan for revision. The plan will need to be re-submitted to be approved and ready for the End of Year Evaluation.

2

Approval Request
Goal Plan Approval Pending

Approve   Reject

Submitter	Date Submitted	Actual Approver	Assigned To
Teri Hyatt	Oct 2, 2019	Ebru Eftelioglu	Ebru Eftelioglu

Linkedin Learning - Additional Resources

Rutgers has partnered with Linked in Learning previously known as Lynda.com to provide a free online learning resource for all Faculty, Staff and Students.

Follow these directions to the site:

www.linkedin.com

1. Click Sign in
2. Click Sign in with your organization account
3. Enter your work email
4. Enter your NetID and Password
5. Search titles using key words:
   Giving and Receiving Feedback
   Providing performance feedback
   Managing difficult coaching conversations
   Coaching for Brilliant Performance
   Having development conversations