



RUTGERS

UNIVERSITY HUMAN RESOURCES

Manager - The Mid-Year Process

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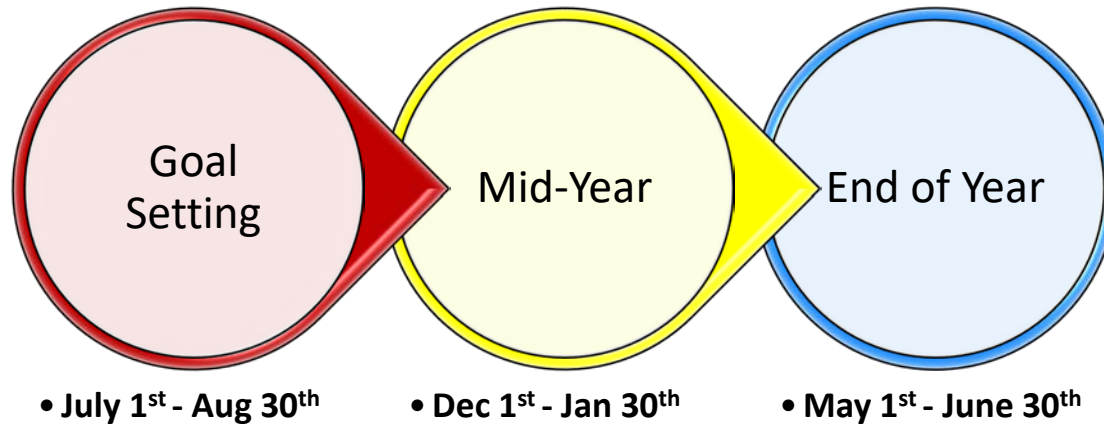
Understanding the Performance Management: Mid-Year Review

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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.

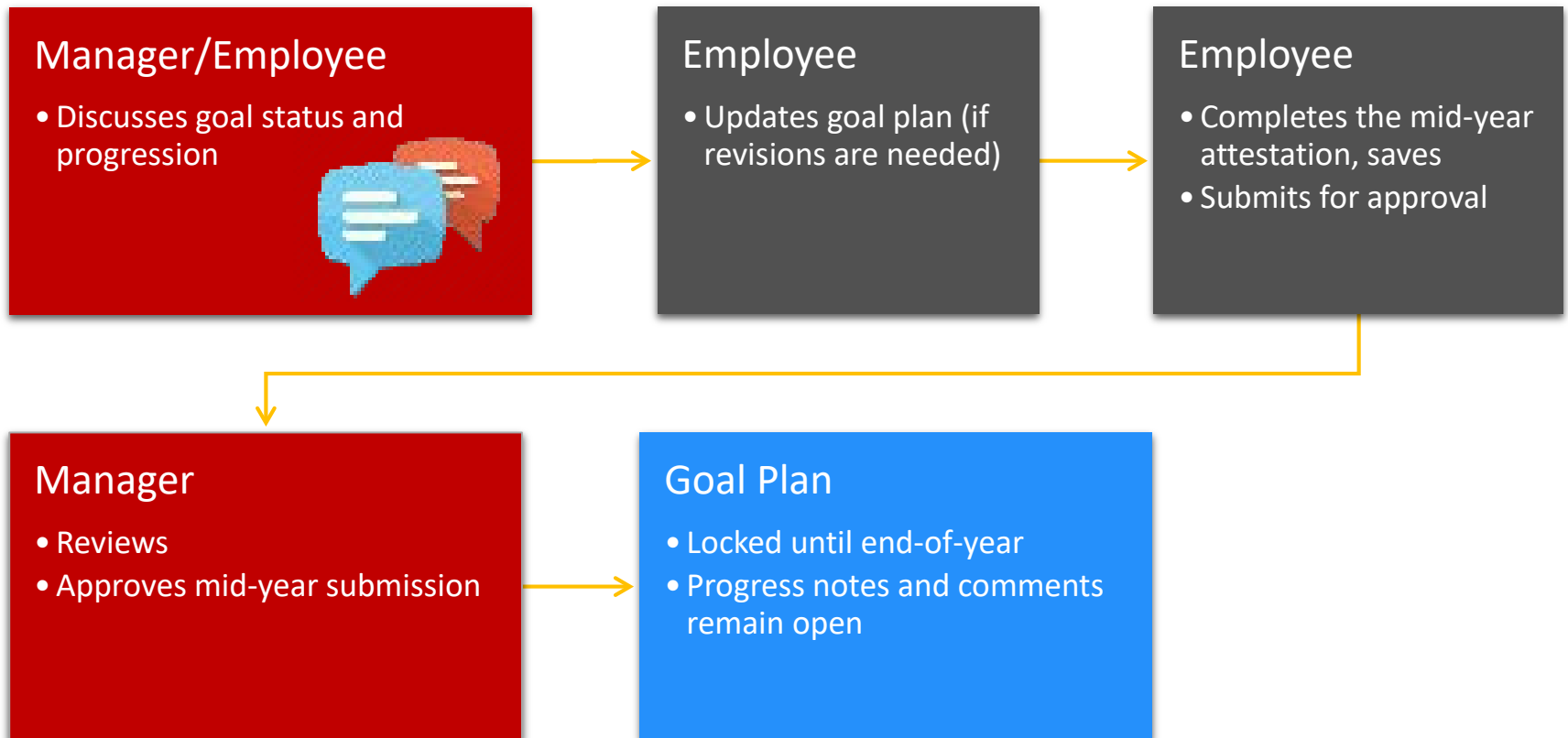
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The Mid-Year Process – Open Dates



The Mid-Year Process

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



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

The screenshot displays the Rutgers Talent and Performance Manager interface. At the top, the Rutgers logo is on the left, and navigation links are on the right: Home (marked with a red circle 1), Goal Plans, Development Opportunities, Progress Notes, and Help. Below the navigation bar, a welcome message reads "Welcome to Rutgers Talent and Performance Manager". Underneath, a section titled "Goal Plan Progress" contains three buttons: "Goal Setting" (grey), "Mid-Year Review" (red, marked with a red circle 2), and "End of Year Review" (grey). At the bottom of the interface, there is a section for a specific goal. On the left, under the heading "Competency Agility", is a red icon of a head with a gear. To the right, under the heading "Goal Description", is the text: "Complete the following course before November 15, 2019. <https://www.lynda.com/Leadership-Management-tutorials/Developing-Adaptability-Manager/753899-2.html> (Shared by Manager)". To the right of this text is a red circle 3 and a red icon of two speech bubbles. On the far right of this section is a red trash can icon. At the bottom left of the interface, there is a red circle 4 and an orange button with a white speech bubble icon and a right-pointing arrow.

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.

4



Updating the Progress Notes – Manager and Report can do this

The screenshot shows the Rutgers Talent and Performance Manager interface. The top navigation bar includes the Rutgers logo, a 'Home' link, and links for 'Goal Plans', 'Development Opportunities', 'Progress Notes' (highlighted with a red circle 1), and 'Help'. Below the navigation bar, a 'Welcome to Rutgers Talent and Performance Manager' message is displayed. The main content area is titled 'Goal Plan Progress' and contains three buttons: 'Goal Setting', 'Mid-Year Review' (highlighted in red), and 'End of Year Review'. A 'New Progress Note' modal is open, showing the following fields:

- Related Employee: Teri Hyatt
- Related Manager: Ebru Eftelioglu
- Type: Mid-Year Review
- Title: Update on Development Goals
- Description: I completed the Project Management 2 day program on the September 23, 2019. A certificate of completion will be uploaded.

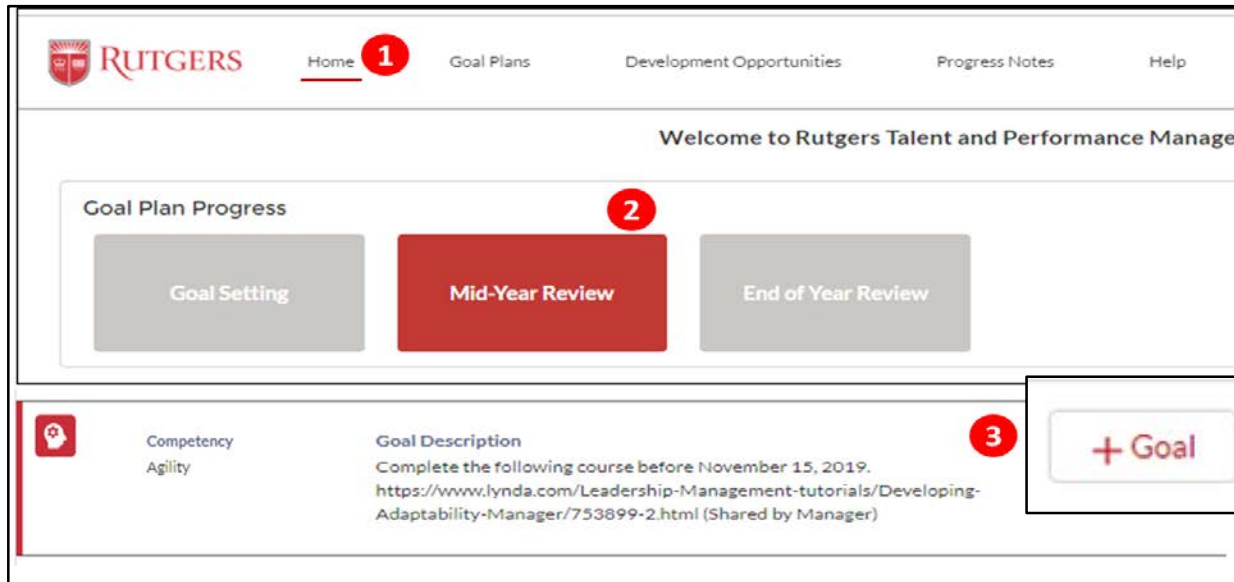
Red numbered circles 2, 3, and 4 indicate the steps for creating a progress note: 2. Use dropdown to identify update Type, 3. Give it a Title, and 4. Add the Description.

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

The screenshot shows a progress bar at the top with stages: In Progress (active), Past Due, Submitted, Requires Modification, and Approved. Below the bar, the form is titled 'Mid-Year Review' with a red 'X' icon. A red circle with the number '4' is next to 'Save' and 'Cancel' buttons. The instruction 'Please re-submit your goal plan for approval' is displayed. Three numbered steps are listed on the left: 1. Have you reviewed your goal plan with your manager? 2. Did you receive constructive feedback from your manager? 3. Any additional comments regarding your Mid-Year Review with your manager? On the right, a dropdown menu is open, showing options: '--None--', '✓ --None--', and 'Yes'. The 'Yes' option is highlighted.

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

The screenshot shows the 'Mid-Year Review' form with a red 'X' icon. A red circle with the number '1' is next to the title. Below the title, a green checkmark icon is next to the title. A red circle with the number '2' is next to the 'Submit for Approval' button. The form displays a table of review details:

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
6/20/2019	Ebru Eftelioglu	Submitted	7/20/2019	10/2/2019	10/2/2019

Below the table, a progress bar shows the status: Submitted (active), Requires Modification, and Approved.

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



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Search for skills, subjects or software



1

Sign in

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

Sign in

Sign in with your organization account 2

Welcome! Use your work email address to log in.

LinkedIn LEARNING

Enter Email Address Need Help?

Continue 3

NetID:

Password:

Authentication Type: Default ▼ 4