

#	<b>The Mid-Year Workflow Overview and Notes</b>
1.	Start by updating your inline goals and progress note, then the Manager and Employee have a conversation. Next the Employee makes any revisions based on that conversation. The employee completes the mid-year attestation, clicks save and clicks submit for approval. The manager receives a notification of the submission, reviews and approves. The Goal Plan Locks again until the end of the year.
2.	<b>The importance of the Mid-Year update and review of the goal plans cannot be understated.</b> It will streamline the conversation when the Employee and Supervisor meet. This meeting is important to review the progress and identify where goals need revision or extra support and submit the attestation.
3.	<b>Catching Up</b> For users just joining the goal setting process, you will need to complete the Goal Setting process with an approval from your manager. Once approved, the Mid-Year will open, and you will be able to “catch-up” to the current workflow by doing the mid-year attestation.

#	<b>USER: Updating In-line Goals Review</b>
1.	On the Home page. Click Mid-Year Review, scroll down you can see each of your goals.
2.	Click the conversation bubble graphic to update the in-line goal progress.
3.	When done, use the orange arrow conversation button on the left to send your Manager then update, then meet to discuss.

#	<b>USER: Updating Progress Notes Review</b>
1.	From the top Navigation bar click Progress Notes.
2.	In the New Progress Note box select the Type from the drop down, give it a Title, and add your Description. Click Next.
3.	if you have a file to upload, click Upload and select the file to load. This may be a PDF of a proposal, or certificate of completion. Anything that supports the progress note just posted.

#	<b>USER/MANAGER: Meeting to Review the Goals</b>
1.	Discuss the Progress of the Development and Performance Goals
2.	Confirm they are still relevant, if they need updated or new goals added, discuss the needed changes. If none are required move on to <b>Doing the Attestation</b>
3.	If changes are needed, the goal plan is unlocked until it is submitted. The Employee or the Manager updates the needed goals. (Click Edit, do the changes, Click Save.) Or Add new Goals (Click +Goal add the goal, click Save.) For more information visit the <b>User Goal Setting Tutorial</b> on the Performance Management Website.

#	<b>USER: Doing the Attestation</b>
1.	Complete the attestation questions, add a comment if you choose. Click Save.

#	<b>USER: Submitting for Approval</b>
1.	Notice the Red X at the Mid-Year is now a Green check. You can now Click Submit for Approval. Submitting for approval locks the goal plan.
3.	If approved the plan is locked until it opens again for Year-End.
4.	Reject will unlock it to re-open the plan for revision with a comment from the Manager. The plan will need to be re-submitted to be approved.

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2.	Follow these directions to the site: <a href="http://www.linkedin.com">www.linkedin.com</a> Click Sign in Box Click the words “Sign in with your organization account” Enter your work email, Enter your NetID and Password, Search titles using key words of interest.

## **Resources**

Performance Management Website

Visit: <https://discover-uhr.rutgers.edu/performance-management/home>

Or Under “Help” in the Application URL: <https://rutgerstalent.force.com/>

## **Assistance:**

Email: [performancemanagement@hr.rutgers.edu](mailto:performancemanagement@hr.rutgers.edu)