

#	The Mid-Year Workflow Overview and Notes
1.	The Employee starts by updating their inline goals and progress notes, 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.	The importance of the Mid-Year update and review of the goal plans cannot be understated. 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.	Catching Up 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 NEXT DAY, the Mid-Year will open, and you will be able to “catch-up” to the current workflow by doing the mid-year attestation.

#	MANAGER/FACULTY-MANAGER: To add a Progress Note
1.	From the top Navigation bar click Progress Notes.
2.	Click the team members name.
3.	In the New Progress Note box select the Type from the drop down – Mid-Year, give it a Title, and add your comments under Description. Click Next.
4.	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.

#	MANAGER/FACULTY-MANAGER: The Meeting to Review the Goals
1.	Discuss the Progress of the Development and Performance Goals
2.	Confirm they are still relevant, if they need updated, discuss the needed changes. If none are required move on to Doing the Attestation
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 User Goal Setting Tutorial on the Performance Management Website.

#	MANAGER/FACULTY-MANAGER: Approving the Mid-Year
1.	The manager receives an email and a notice in their notification bell.
2.	Review the goal plan, click Approve or Reject
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. The plan will need to be re-submitted to be approved.



Performance Management: Mid-Year Process – Manager Guide

✦	Rutgers has partnered with Linked in Learning
1.	Previously known as Lynda.com to provide a free online learning resource for all Faculty, Staff and Students.
2.	Follow these directions to the site: www.linkedin.com 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