Performance Management End of Year Process

System User Guide - Employees

#	End of Year Review Workflow Overview
1.	Update your year-end goal plan status in the **Progress Notes** tab in the navigation bar at the top.
2.	Participate in the review conversation with your manager. Be sure to review your goal plan beforehand, as it will streamline this conversation. During this conversation, you and your manager will review the progress you have made, identify goals that should move to the next fiscal year, and plan for extra support where needed.
3.	Complete the End of Year Review Confirmation, **Save**, and then **Submit for Approval**.
4.	Your manager will receive a notification of the submission, review, and approve.

#	USER: Updating Progress Notes
1.	In the navigation bar at the top of your screen, select the **Progress Notes** tab.
2.	Click on the **New Progress Note** button. A box will appear in the center of your screen. Fill out all related fields as necessary to best illustrate your End of Year progress. When complete, hit **Save**.
3.	After saving the progress note, you will have the option to upload files. Click on the icon on the right-hand side of the line item. Select **Show Details,** and a pop-up box will appear. Select the **Files** tab at the top of the pop-up box and upload any related files, including feedback from project team members.

#	USER: After the End of Year Review Conversation
1.	Your manager will schedule time with you to review your End of Year progress.
2.	Review your goal plan beforehand and note how you tracked against your goals. This activity will streamline the End of Year Review Conversation. During this conversation, you and your manager will review the progress you have made, identify goals that should move to the next fiscal year, and plan for extra support where needed.

#	USER: Submit End of Year Review Confirmation
1.	Before submitting for approval, you will need to fill out the End of Year Review Confirmation. The questions are "Have you reviewed your goal plan with your manager?", "Did you receive constructive feedback from your manager?", and "Any additional comments regarding your End of Year Review with your manager?". Click **Save**.
2.	The icon next to End of Year Review will update from × to ✓. Click **Submit.** This action will lock the goal plan.

#	UNIQUE CIRCUMSTANCES: New Hires Joining Before April 29th
0.	Note: It is important to consider that goal plans are generated until April 29th. Since this performance management process is rooted in conversation and progress towards your goals, we encourage all new joiners up until April 29th to create a goal in the system. Keep the goals reflective of the first 60 days within your role.
1.	Users new to the Performance Management system will need to complete the Initial Goal Setting process by submitting goals for approval to your manager. Remember: Goal plans should be completed within the first 30 days of an employee's start date, so work with your manager directly on your goals.
2.	Once your manager approves the goal plan, the End of Year Review cycle will open the next day. To be able to "catch-up" to the current workflow, you must complete the End of Year Review Completion questions and click **Submit**.
3.	It is recommended to have a performance check-in with your manager after your first 90 days to ensure you are tracking on progress towards your goals.

For more tools and resources, visit the Performance Management page
https://uhr.rutgers.edu/performance-management/home

Access the "Help" section directly in the Performance Management System
https://rutgerstalent.force.com/

Further questions? Contact us.
performancemanagement@hr.rutgers.edu

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