

Performance Management End of Year Review

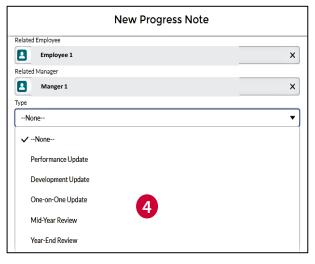
Employee Process User Guide

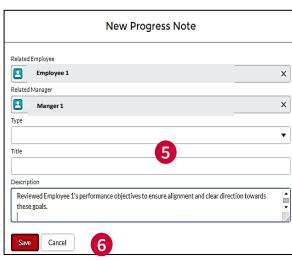


# **Update Your Progress Notes**

- Click the Progress Notes tab
- Click My Progress Notes to view existing notes
- 3 Click New Progress Note to create a new progress note
- Select the type of progress note you would like to create: Year-End Review
- Populate Title and Description fields with relevant information
- 6 Click **Save** to record your entry and upload supporting documents







### \*Alert your manager once you have this step complete\*

**Note:** Well written goal statements should make clear your level of accomplishment, so there should be no surprises of your goal ratings.

Login to the PM System: <a href="https://rutgerstalent.force.com">https://rutgerstalent.force.com</a>



# **Employee Notification to Review**

- Your manager will review your goal plan and add ratings based on your updated Progress Notes.
  Once the manager level approvals have signed off on your goal plan, your manager will schedule your End of Year review.
- 2 You will receive a notification when your manager makes their ratings and the goal plan visible to you. Click the link in the email to view.



2 Your Manager has made year end updates to your goal plan.

Click the link below to access your goal plan.

https://pmdev-pmdevrutgerstalent.cs70.force.com/s/goalplan/a0E3D0000000n60o

Should you have any questions, work directly with your manager.
Sincerely,

Rutgers University HR Team

### **Translating Overall Ratings**

**HIGH:** Achieved the highest level on <u>all</u> agreed upon performance measures

**MEDIAN:** Achieved more than agreed upon performance measures

**BASE**: Achieved agreed upon performance measures

**DID NOT MEET THRESHOLD** 

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## **End of Year Review Conversation**

This part of our performance management cycle is an opportunity for employees and managers to celebrate accomplishments, discuss strengths, and identify areas of further development in relation to position-specific responsibilities, overall performance, and career aspirations.

Once your manager has scheduled your End of Year Review, use the Employee Conversation guide *(right)* to prepare for the conversation.

Remember, setting clear SMART goals during Initial Goal Setting ensures that there are no surprises by the time End of Year Review takes place. However, still arrive to the conversation with an open mind. You and your manager are on the same team – your success is theirs as well, so lean into their feedback to bring your best to the next fiscal year.



#### Want to make the most of your End of Year Review? Start here!

From May 1 - June 30, our Performance Management system opens for End of Year Review. This piece of our performance cycle is an opportunity for employees and managers to celebrate accomplishments, discuss strengths, and identify areas of further development in relation to position-specific responsibilities, overall performance, and career aspirations.

#### Preparing for the process

- Review the goals you entered in the Performance Management system during the Mid-Year Review phase, including your Progress Notes.
- Enter in-line goal comments (using the icon) for short updates, or Progress Notes for longer updates and file attachments.
- Discuss with your manager when to expect your review; ongoing alignment between you and your manager will be critical to your success.

#### Preparing for the conversation

Once your manager has scheduled your End of Year Review, take time to reflect on the below questions. Use these insights to shape your conversation.

- . What were your key objectives and to which extent did you achieve them?
- What was your proudest achievement?
- Have there been any barriers to achieving your goals? Any unexpected wins?
- How did the goals set for this year help you in achieving your development objectives?

Arrive to the conversation with an open mind. You and your manager are on the same team – your success is theirs as well, and it is important to work together on best defining your annual goals!

#### Finalization

After your End of Year Review conversation, make the necessary updates in the Performance Management system using the Edit button, completing the End of Year Review Confirmation, and clicking Submit for Approval when complete

Want to learn more about the system? Click here for the End of Year Review System Guide for Employee

For more resources and tutorials, visit the OneRED website.

## **End of Year Review Confirmation**

- Login to the
  Performance
  Management System
- 1 Click **Edit** on End of Year Review
- 2 Answer the questions using the dropdown. Leave a comment, if desired.
- 3 Click Save
- At the top, click

  Submit for Approval.

  On the next screen,
  select Finish.

