



RUTGERS

University Human Resources

Performance Management End of Year Review

Employee Process User Guide



Update Your Progress Notes

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

1

2

3

There are no progress notes for the selected employee or date range

New Progress Note

Related Employee
Employee 1 X

Related Manager
Manger 1 X

Type
--None--

✓ --None--

Performance Update

Development Update

One-on-One Update

Mid-Year Review

Year-End Review

4

New Progress Note

Related Employee
Employee 1 X

Related Manager
Manger 1 X

Type
--None--

Title
Reviewed Employee 1's performance objectives to ensure alignment and clear direction towards these goals.

Description
Reviewed Employee 1's performance objectives to ensure alignment and clear direction towards these goals.

Save Cancel

6

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:
<https://rutgerstalent.force.com>

Employee Notification to Review

- 1 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-pmdev-rutgerstalent.cs70.force.com/s/goal-plan/a0E3D00000n60o>
Should you have any questions, work directly with your manager.
Sincerely,
Rutgers University HR Team

Translating Overall Ratings

HIGH: Achieved the highest level on all agreed upon performance measures

MEDIAN: Achieved more than agreed upon performance measures

BASE: Achieved agreed upon performance measures

DID NOT MEET THRESHOLD

Login to the PM System:
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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.



Performance Management End of Year Review Employee Process Overview

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

1. Review the goals you entered in the Performance Management system during the Mid-Year Review phase, including your Progress Notes.
2. Enter in-line goal comments (using the 📌 icon) for short updates, or **Progress Notes** for longer updates and file attachments.
3. 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 Employees.](#)

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**
- 4 At the top, click **Submit for Approval**. On the next screen, select **Finish**.

The screenshot displays the 'Goal Plan' interface for 'First Name LastName - FY202X'. At the top right, there are three buttons: 'Submit for Approval' (marked with a red '4'), 'Assign Goal to Team', and 'Change Listed Manager'. Below this is a table with the following data:

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
6/20/2019	Manager 1	Employee Review	9/4/2019	11/1/2019	11/1/2019

Below the table is a progress bar with five stages: 'Employee Review' (active, dark blue), 'Submitted', 'Requires Modification', and 'Approved'. A mouse cursor is pointing at the 'Employee Review' stage.

The main content area is titled 'End of Year Review' and contains the following text and form elements:

- A red 'X' icon and the title 'End of Year Review'.
- An 'Edit' button (marked with a red '1').
- The instruction: 'Please submit your goal plan for approval'.
- A question: 'Have you reviewed your goal plan with your manager?' with a dropdown menu showing 'No Value Selected' (marked with a red '2').
- A question: 'Did you receive constructive feedback from your manager?' with a dropdown menu showing 'No Value Selected'.
- A question: 'Any additional comments regarding your Year-End Review with your manager?' with a text input field.
- A 'Save' button (marked with a red '3').