

# Employee Guide

# Log In

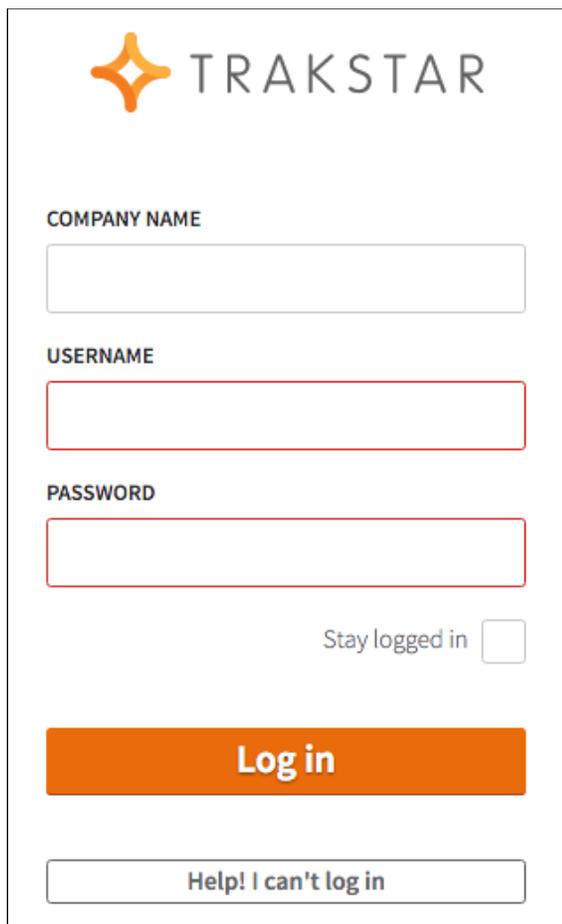
## 1. Navigate to [www.trakstar.com](http://www.trakstar.com)

Click **Sign In** on the top right of the screen.



## 2. Input Company Name, Username, and Password.

Passwords are case sensitive.

A screenshot of the Trakstar login form. At the top left is the Trakstar logo. Below it are three input fields: 'COMPANY NAME', 'USERNAME', and 'PASSWORD'. Below the 'PASSWORD' field is a 'Stay logged in' checkbox. At the bottom of the form is a large orange 'Log in' button and a smaller 'Help! I can't log in' button.

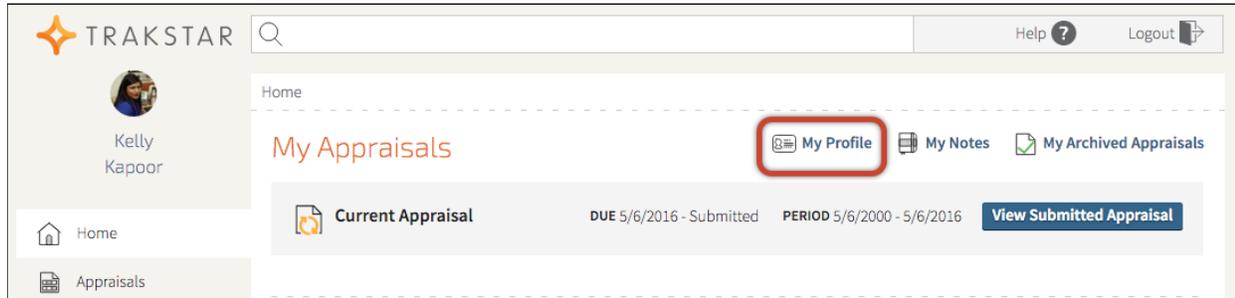
### FORGOT YOUR PASSWORD?

Click the button under the login details: **“Help! I can’t log in”**

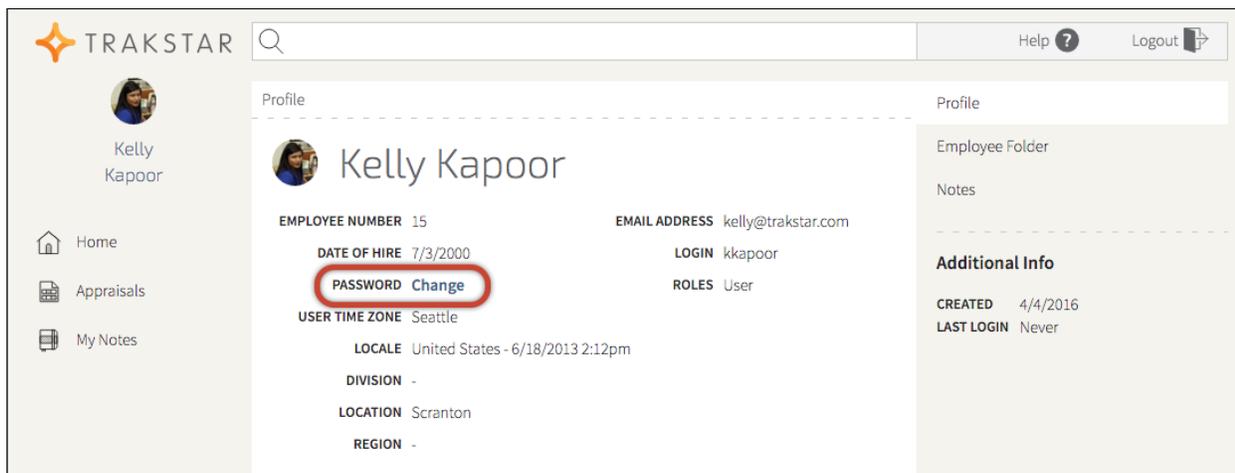
We’ll send you an email that contains a personalized link to reset it.

# Change Your Password

## 1. Click My Profile



## 2. Click Change



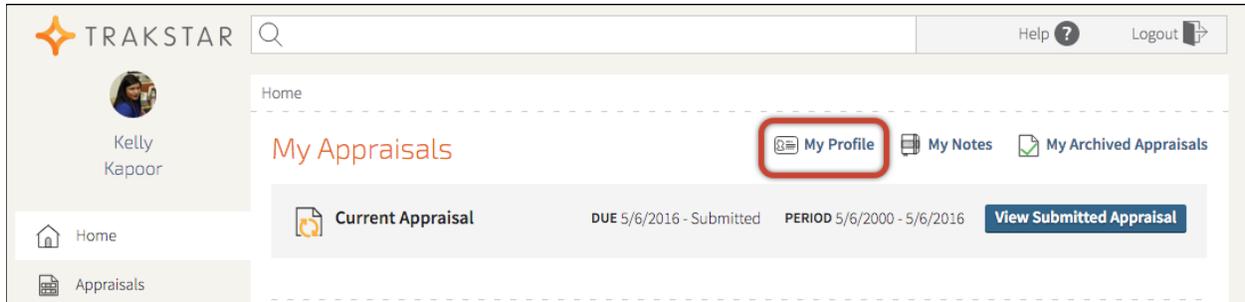
## 3. Type In Information Required

You are required to fill in your old password, new password, and to verify the new password.

 A screenshot of the 'Change Password' form. The form title is 'Change Password'. It contains three text input fields labeled 'OLD PASSWORD', 'NEW PASSWORD', and 'VERIFY PASSWORD'. Below these fields is a checkbox labeled 'SHOW PASSWORDS'. At the bottom right of the form are two buttons: 'Cancel' and 'Change Password'.

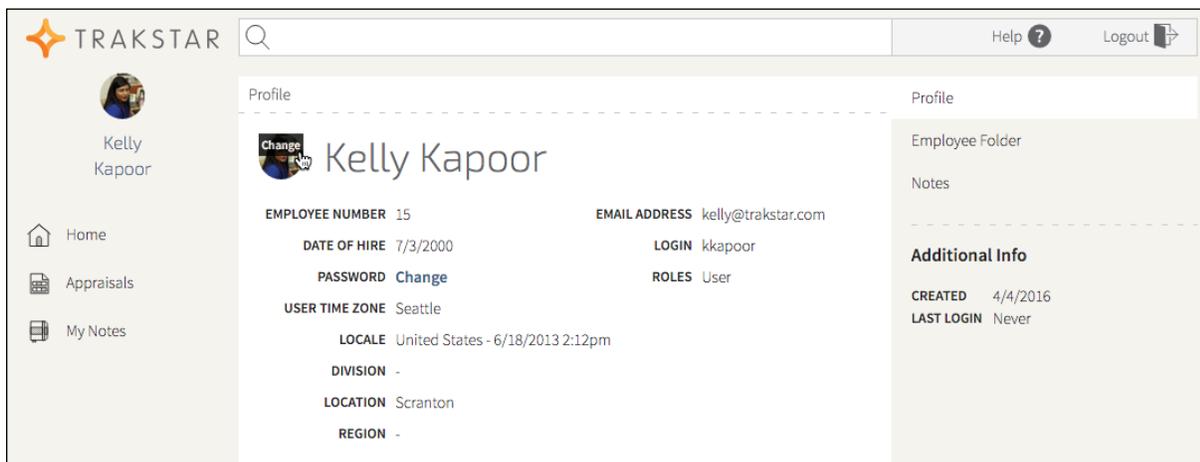
# Upload or Change Your Photo

## 1. Click My Profile



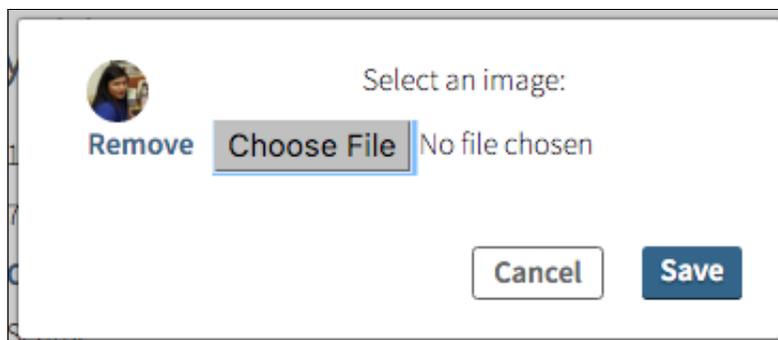
## 2. Hover Over Your Photo (adding a photo is optional)

Click on “Change” to change your photo



## 3. Choose an Image From Your Computer

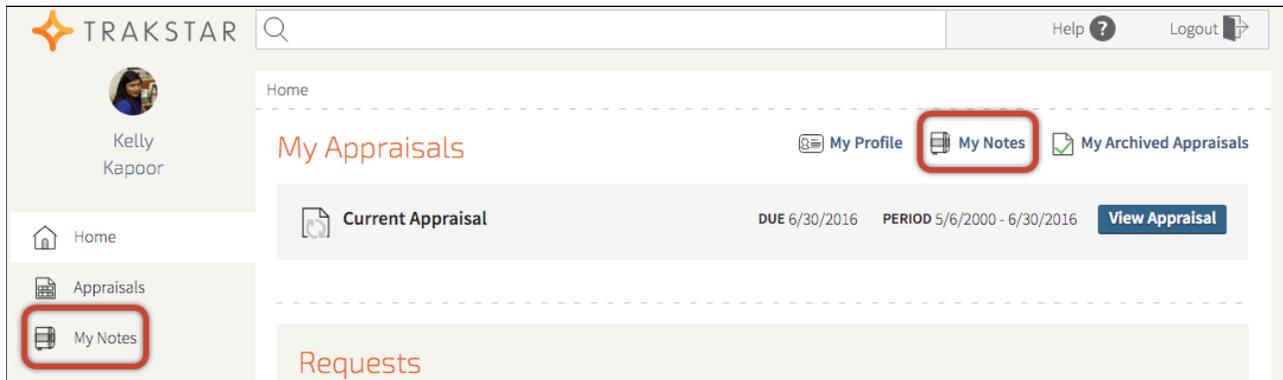
It's a thumbnail - a 16x16 picture works best. Click 'Save' to finalize changes.



# Take a Note on Your Appraisal

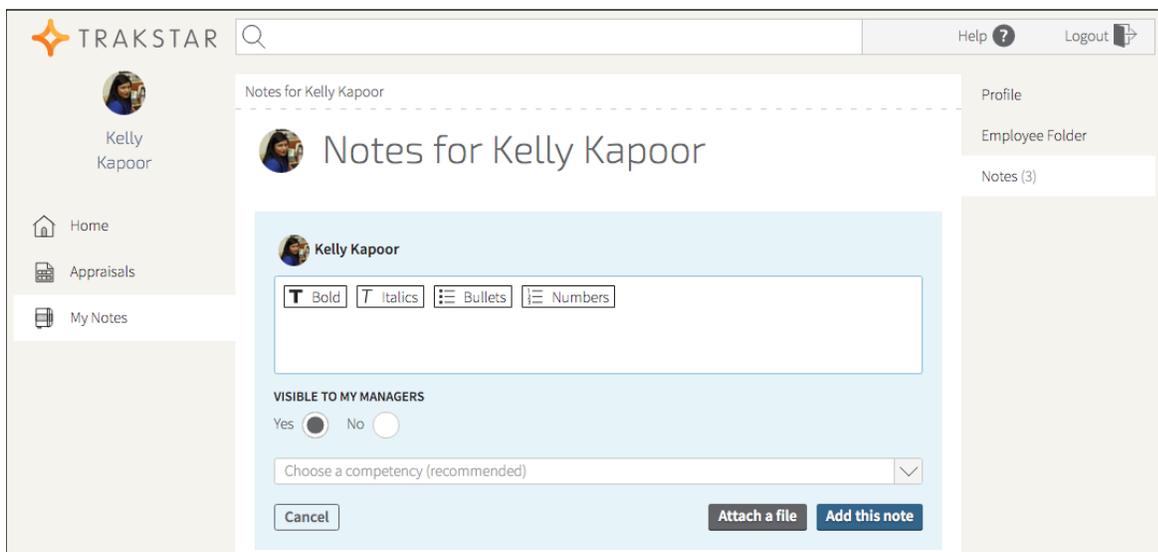
## 1. Select My Notes from the Homepage

You can find 'My Notes' in the navigation bar and above your appraisals.



## 2. Input Your Note

Enter your note in the text box and select a privacy setting to determine if the note will be visible to your manager. Select a competency that this note is related to. If no competency is selected, your text will be placed in the General Notes section. You may also attach a file (Customer Letter, Certificate etc.). Save by clicking **Add This Note**.



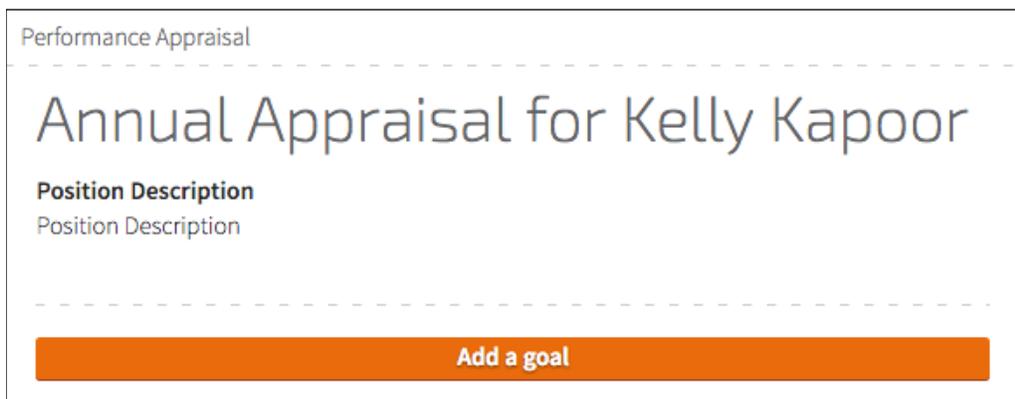
# Add a Goal to Your Appraisal

## 1. Click Set Goals under Current Appraisal

If your Appraisal is in scoring, this button will say “score appraisal”. You will need to click “**manage goals and notes**” on the next page to add goals to your appraisal.



## 2. Click Add a Goal



### HELPFUL INFORMATION

You will see an “Add a Goal” button to enter each of your goals. Managers may have the ability to set goals for their employees, too.

You are also able to add a Measurement which will attach the goal to a competency or goal for the agency, division, section, etc. You can add multiple measurements for multiple connections to goals, if appropriate.

Goals are annually scored and can carry weight on the overall appraisal.

### 3. Add an Existing Goal, or Create a New One

Fill in the name of the goal and a description if desired. Select the appropriate rating scale. **Save Goal** when done.

#### Add a goal

Add an existing goal  
 Create a new goal

**GOAL NAME**

**GOAL DESCRIPTION**

**T** Bold
*T* Italics
☰ Bullets
☰ Numbers

**Rating Scale**

Select a Rating Scale ^

Select a Rating Scale  
 default  
 Default Scale

### 4. Select the Location of the Goal

Select **Save Goal** once you have selected the section for the Goal, then a window will open asking you to choose the location of the goal. Follow the agency guidance on how many of which types of goals you create.

#### Add a goal

#### Where would you like to insert this goal?

Testing

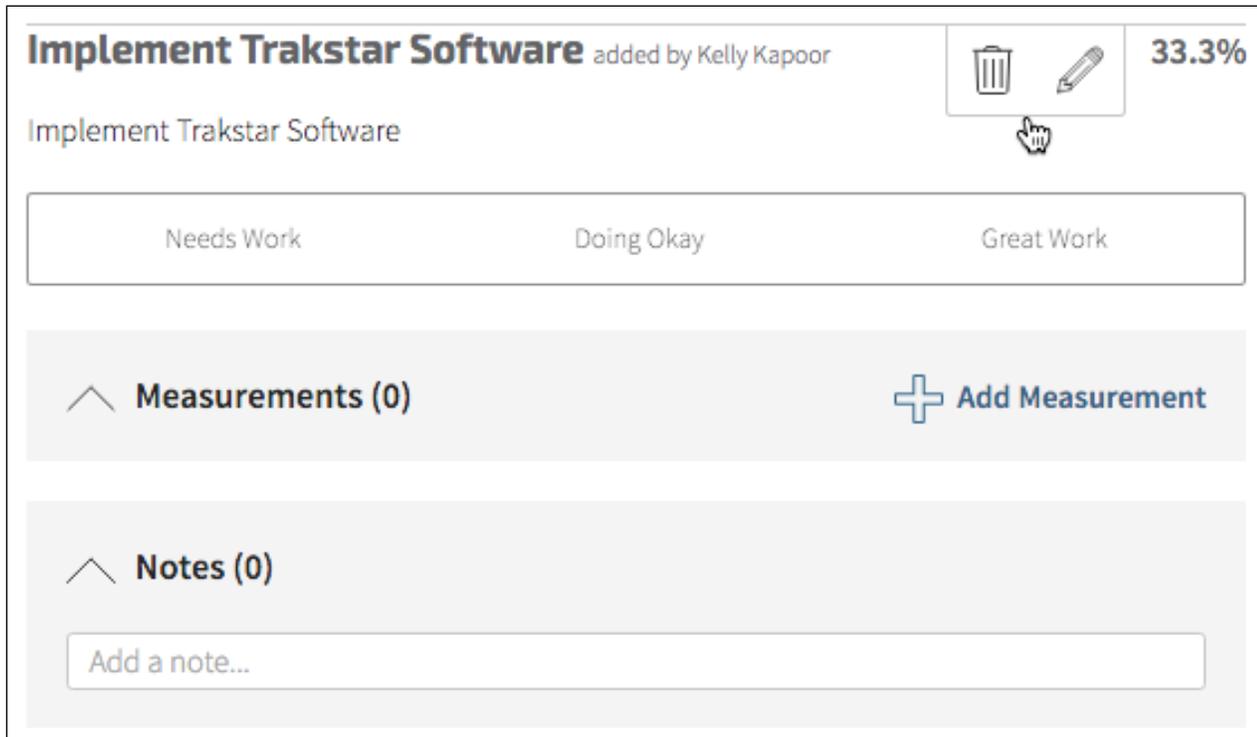
- In section: Performance Goals  
 In section: Professional Development Goals

PLEASE NOTE: Now, your new goal shows up as a line item that will be scored during your next evaluation.

# Edit or Remove a Goal

## 1. Hover your mouse Over the Goal

The **Trash Can** icon will remove the goal. The **Edit Pencil** will allow you to make changes.



**Implement Trakstar Software** added by Kelly Kapoor 33.3%

Implement Trakstar Software

Needs Work      Doing Okay      Great Work

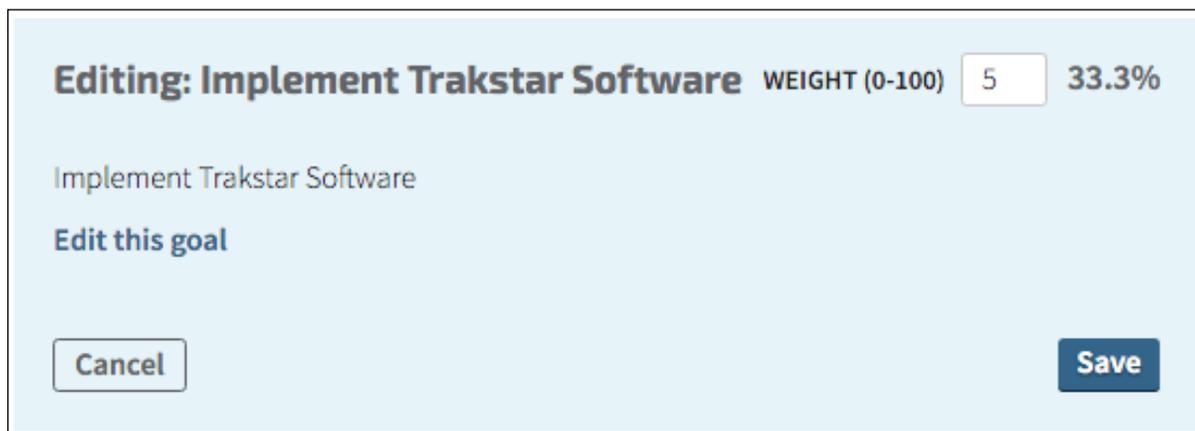
Measurements (0) + Add Measurement

Notes (0)

Add a note...

## 2. Editing Your Goal

If **Edit** is selected, the content of the goal can be edited and the weight of the goal can be adjusted. Adjusting the weight of the goal will likely have consequences on resulting score.



**Editing: Implement Trakstar Software** WEIGHT (0-100)  33.3%

Implement Trakstar Software

**Edit this goal**

# Add a Measurement to Your Appraisal

## 1. Click Set Goals or View Appraisal under the Current

If your Appraisal is in scoring, this button will say “score appraisal”. You will need to click “**manage goals and notes**” on the next page to add goals to your appraisal.



## 2. Locate Where You Want to Add a Measurement

Measurements can be added to a competency or a goal to show connection to a strategic goal of the agency, division or section. Click **Add Measurement** to add a measurement.

 A screenshot of the 'Add Measurement' form in the TRAKSTAR application. The form is titled 'Measurements (0)' and has an 'Add Measurement' button in the top right corner. The form contains several sections:
 

- MEASUREMENT TITLE:** A text input field with a red border.
- MEASUREMENT DESCRIPTION:** A rich text editor with buttons for Bold, Italic, Underline, Bullets, Numbers, and Link.
- PERCENT COMPLETE:** A dropdown menu with a '-' sign.
- STATUS:** A dropdown menu with a '-' sign.
- STARTED, DUE, COMPLETED ON:** Three text input fields for dates.
- ALIGN TO STRATEGIC GOAL:** A dropdown menu with the text 'Choose a strategic goal to align to'.

 At the bottom of the form, there are three buttons: 'Add Email Reminder', 'Cancel', and 'Save'.

### 3. Fill in the Measurement Fields

The 'Measurement Title' and 'Align to Strategic Goal' are required. This is a great place for any SMART details you would like to include. Finish by clicking **Save**.

Measurements (0) + Add Measurement

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**MEASUREMENT TITLE**

**MEASUREMENT DESCRIPTION**

**B** Bold *I* Italics U Underline ☰ Bullets ☰ Numbers 🔗 Link

SMART measurement details here

**PERCENT COMPLETE**      **STATUS**

▾       ▾

**STARTED**      **DUE**      **COMPLETED ON**

 **ALIGN TO STRATEGIC GOAL**       ▾

**Add Email Reminder**

# Score Your Self-Appraisal

## 1. Click Score Appraisal on the home page



## 2. Select a Score for each Goal and Competency

Use the Rating Scale bar your company uses to pick your score.

### Communication

16.7%

Written, spoken or other means of communication that expresses information, understanding replies or requests of others; willingness to listen and share information. Good customer service. Ability to effectively use current technology needed for designated program(s).

<input type="checkbox"/> N/A	<input type="checkbox"/> Not Meeting Expectations	<input type="checkbox"/> Building Performance	<input type="checkbox"/> Solid Performance	<input type="checkbox"/> Strong Performance	<input type="checkbox"/> Leading Performance
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#### HELPFUL INFORMATION

Your current appraisal will enter the scoring window at your organization's designated evaluation time. At that time, your current appraisal button will change from "Set Goals" to "Score Appraisal" and you can begin scoring.

### 3. Add Comments if Desired

Save comments by clicking **Add This Comment**. Comments are **STRONGLY RECOMMENDED FOR STAFF** and can include an attachment that will be linked with the appraisal.

**Initiative** 33.3%

Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.

Not Effective	Minimally Effective	Effective	Highly Effective	Exceptional
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Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently with little direction.

∨ **Notes (1)**

∧ **Comments (1)**

**Kelly Kapoor**

**T** Bold
*T* Italics
☰ Bullets
☰ Numbers

I always take initiative on new projects, volunteering to take on whatever needs to get done. I am highly effective at taking initiative.

Cancel
Save this comment

#### HELPFUL INFORMATION

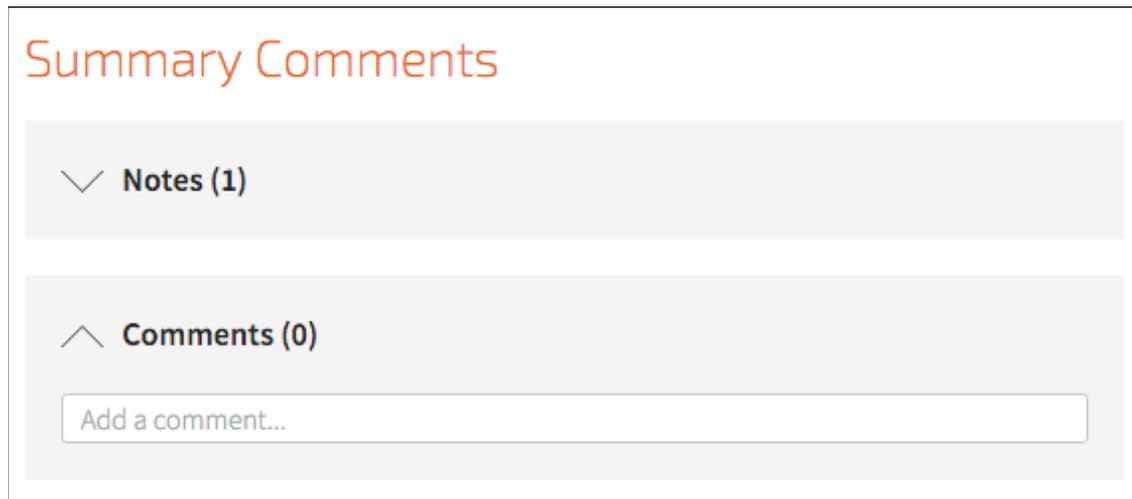
If you have taken notes throughout the 'Goals and Notes' period, you can review your notes within the notes section. You are also able to copy the notes to comments and edit them to be seen with your final, scored appraisal.

### 4. Answer Open-Ended Questions Currently Unavailable

Trakstar requires an answer to all questions. To save, click **Save This Comment**.

## 5. Use Summary Comments for Final Thoughts

You can provide any attachments with summary comments as well. Summary comments are not required.



The screenshot shows a section titled "Summary Comments" in orange text. Below the title, there are two expandable sections: "Notes (1)" with a downward arrow and "Comments (0)" with an upward arrow. Under the "Comments (0)" section, there is a text input field with the placeholder text "Add a comment..."

## 6. Send to Manager Upon Completion

Your manager can't see any self-appraisal information until you click **Send to Manager**. Also, the Self-Appraisal can't be edited once it has been sent to your manager.



The screenshot shows the "Kelly Kapoor Self Appraisal Form" interface. At the top, it says "Kelly Kapoor Self Appraisal Form". Below that, the main title is "Annual Appraisal for Kelly Kapoor". Underneath the title, there is a "Position Description" section with a "Manage Goals and Notes" button (represented by a document icon). At the bottom left, there are two status indicators: "0 Unscored Competencies" and "0 Unanswered Questions". At the bottom right, there is a prominent blue button with a red border labeled "Send to Manager".

# Provide Multi-Rater Feedback

**Currently  
Unavailable**

## 1. Click Give Multi-Rater Feedback

If you are asked to provide Multi-Rater Feedback, you will receive an email and the request will appear on your **Home** page under **Requests**.

The screenshot shows the user's Home page in the Trakstar system. The user is Kelly Kapoor. The page has a sidebar with navigation links for Home, Appraisals, and My Notes. The main content area is titled 'My Appraisals' and includes links for 'My Profile', 'My Notes', and 'My Archived Appraisals'. Under 'My Appraisals', there is a 'Current Appraisal' section with a 'Score Appraisal' button. Below this, the 'Requests' section is visible, featuring a request to 'Give Multi-Rater Feedback' for Jim Halpert, requested 7 days ago by Michael Scott. This request is highlighted with a red circle.

## 2. Complete the Request

Select a rating from the rating scale for each competency listed or you may have N/A as an option/ You can add comments as desired as well. The scores and comments are sent directly back to the requesting manager. You may also be asked to answer some open ended questions.

The screenshot shows the 'Initiative' competency rating scale. The title 'Initiative' is on the left, and the score '33.3%' is on the right. Below the title is a description: 'Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.' The rating scale consists of five buttons: 'Not Effective', 'Minimally Effective', 'Effective', 'Highly Effective' (which is selected and highlighted in blue), and 'Exceptional'. Below the scale is another description: 'Actively seeks and identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently. Maintains energy and focus towards achieving goals.' At the bottom, there is a 'Comments (1)' section with a comment from Kelly Kapoor: 'Jim shows great initiative in all projects - he is a real inspiration.' There is an 'Add a comment...' input field at the bottom.

### 3. Click **Send to Manager** when Completed

When all goals and competencies have been scored, and all the questions have been answered, you can click **Send to Manager**. If you need to amend your appraisal, your Manager can send the document back to you so modifications or additions can be made.

The screenshot shows a form titled "Position Description" with a sub-header "Position Description". Below this, there are two progress indicators: "0 Unscored Competencies" and "0 Unanswered Questions". A "Send to Manager" button is highlighted with a red rounded rectangle.

4. Once your Manager has reviewed and scored your Appraisal, each employee will have a one-on-one meeting to discuss the results. You will be able to see the score you and your Manager chose for each goal and competency.

5. The last step of the process is to Acknowledge your Appraisal with your electronic signature. Once the signatures are complete, your Appraisal will be Archived.

## Signatures

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

I have reviewed this document and discussed the contents with my direct supervisor. My signature means that I have been advised of my performance assessment but does not necessarily imply that I agree with the evaluation.

**Direct Supervisor Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

I have provided my evaluation of this employee's job performance. While I have reviewed the employee's comments and examples, that does not mean that I agree with them.

**Director Signature** \_\_\_\_\_ **Date** \_\_\_\_\_