

Manager Guide

Taking a Note on an Employee

1. Locate the Employee You Want to Take Notes On

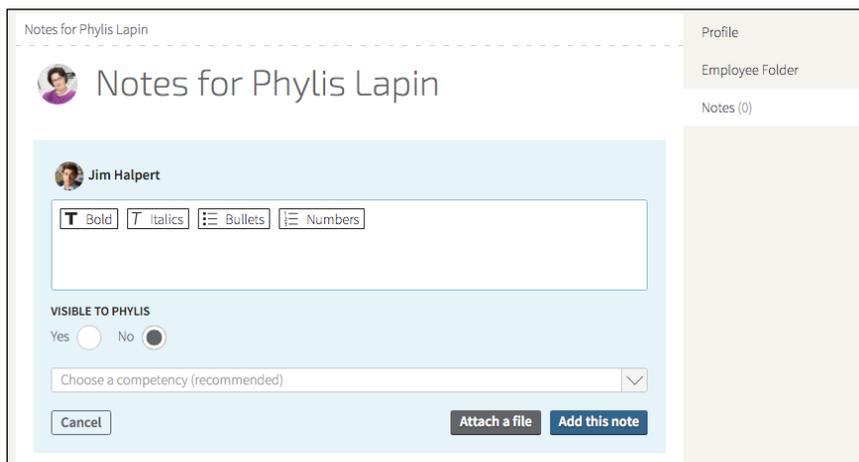
Once you locate the employee from your list of Direct Reports, click on **Notes**.



If your organization has enabled notes on all employees, you may also see a group of other staff members at the bottom of your home page that you can take notes on. Just click the name of the employee you'd like to take a note on.

2. Input the Note

Enter your note text and select a privacy setting to determine if the note is visible to the employee or not. You also have the option to associate the note to a specific element from the appraisal document, if one is not selected the note is categorized under General Notes. Make sure to select **Add this Note** to save.



Add a Goal to an Employee's Appraisal

1. Choose the Employee You Want to Add a Goal For

Hover your mouse over the Employee's Appraisal progress bar and click on **Set Goals**. If the Employee's Appraisal is in scoring, this button will say Score. You will need to select to **Manage Goals and Notes** on the Appraisal page to add goals to your Employee's appraisal.

Phylis Lapin
Notes • Profile

Sales Associate
5/6/2015 - 5/31/2016

Set Goals

Scorable
5/1/2016

Approval

Archive by
5/31/2016

2. Click Add a Goal

Annual Appraisal for Phylis Lapin

Position Description
Position Description

Add a goal

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

Enter the name of the goal and a description if desired. **Save Goal** when done.

4. Confirm the Location of the Goal

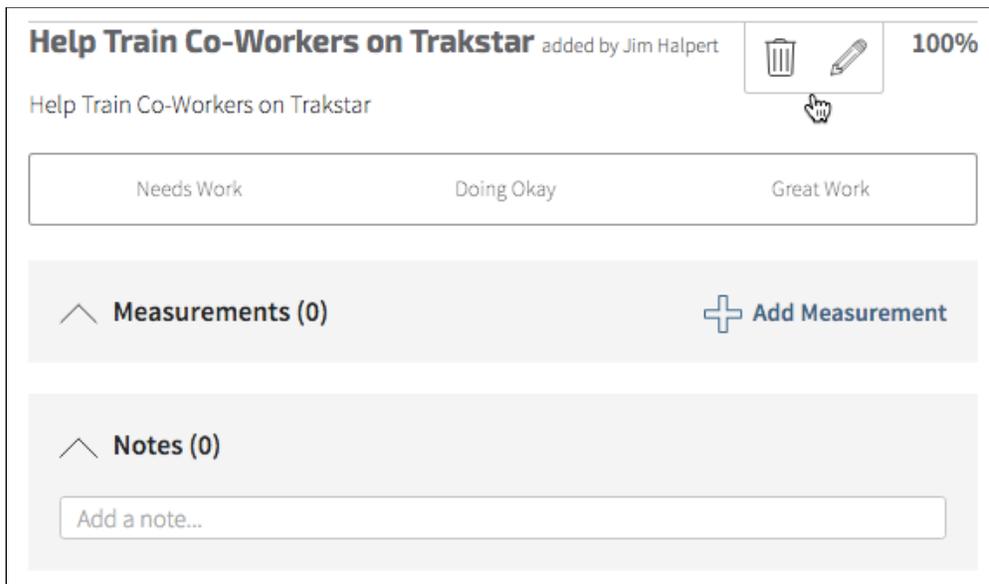
Click **Insert Goal**.

NOW, YOUR NEW GOAL SHOWS UP AS A LINE ITEM THAT WILL BE SCORED DURING YOUR EMPLOYEE'S EVALUATION

Edit or Remove a Goal

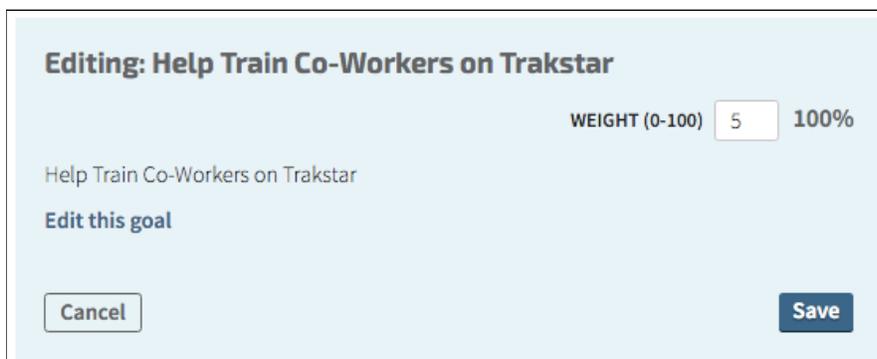
1. Hover Over the Goal

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



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 effect the weights of the other goals on the Appraisal.



PLEASE NOTE

Only the author of the Goal has the ability to Edit that Goal. If the employee added a specific Goal, they will need to edit that Goal if necessary.

Add Measurements to an Appraisal

1. Locate the Employee Who You Want to Add a Measurement

If the Employee's Appraisal is in scoring, this progress bar will say "Score". You will need to click "**Manage Goals and Notes**" on the next page to add measurements to your Employee's

Phylis Lapin
Notes • Profile

Sales Associate
5/6/2015 - 5/31/2016

Set Goals | Scorable 5/1/2016 | Approval | Archive by 5/31/2016

2. Decide Where You Want to Add the Measurement

Measurements can be added to a competency or a goal. Click **Add Measurement** when you're ready to add a measurement.

Help Train Co-Workers on Trakstar added by Jim Halpert 100%

Help Train Co-Workers on Trakstar

Needs Work Doing Okay Great Work

^ **Measurements (0)** **+ Add Measurement**

^ **Notes (0)**

Add a note...

3. Enter in the Measurement Details

Only the 'Measurement Title' is a required field. Finish by clicking **Save**.

The screenshot shows a form with the following sections:

- MEASUREMENT TITLE:** A text input field containing "Read the Employee Quick Start Guide".
- MEASUREMENT DESCRIPTION:** A rich text editor area with buttons for Bold (T), Italic (T), Bullets (☰), and Numbers (☰). Below the buttons is the text "Read and take notes on the Trakstar employee quick start guide."
- PERCENT COMPLETE:** A dropdown menu showing a dash (-).
- STATUS:** A dropdown menu showing a dash (-).
- STARTED, DUE, COMPLETED ON:** Three empty text input fields.
- Buttons:** "Add Email Reminder" (dark grey), "Cancel" (light grey), and "Save" (dark blue).

OPTIONAL

Keep yourself accountable with email reminders. Add an email reminder to your measurement by clicking **'Add Email Reminder'**. You can then choose when you would like the email reminder to be sent, and to whom.

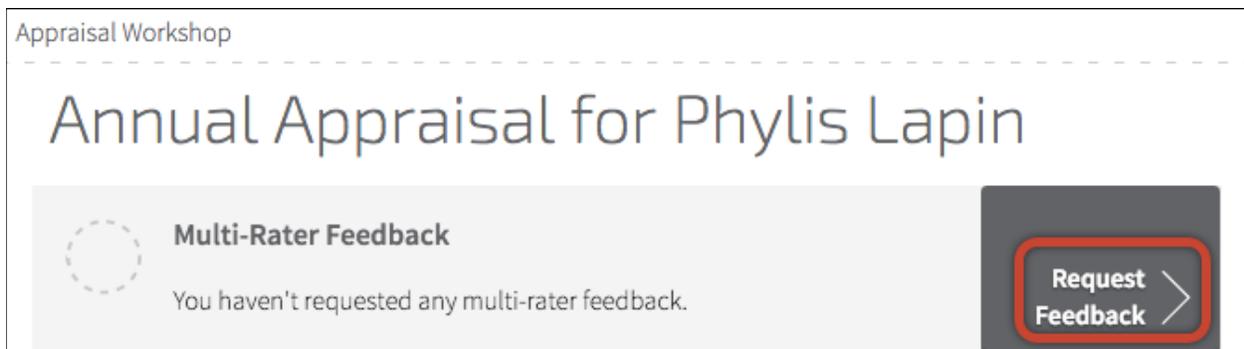
Request Multi-Rater Feedback **NOTE: FCPH is not using this feature currently**

1. Select the Employee You Want Multi-Rater Feedback on

Hover your mouse over the Employee’s Appraisal progress bar and click.



2. Select Request Feedback in the Appraisal Workshop



PLEASE NOTE

Multi-Rater Feedback is an optional step in the appraisal workshop.

Organizations may, at the Administrative level, decide to not enable Multi-Rater, which elements are scorable by Multi-Raters, and/or if the feedback will be anonymous.

Multi-Rater feedback does not affect the overall appraisal score. Ratings are not calculated into the final score.

3. Fill Out the Requested Information

On this page you can fill out who you would like to **Select as a Multi-Rater**, **Add a Multi-Rater**, select the **Elements to Include** for Multi-Raters to score, choose to **make Feedback anonymous***, and then click **Save** when you're complete.

*Multi-Rater Feedback is always anonymous to the Employee. Checking the box to make Feedback anonymous, makes the feedback anonymous to the managers and administrators as well.

Appraisal Workshop / Multi-Rater Feedback

GROUP NAME

Multi-Rater Feedback Group

Select a Multi-Rater

▼

Remove

+ Add a Multi-Rater

Elements to include in Multi-Rater reviews

- Core Values
 - Initiative
 - Perseverance
 - Communication
- Goals
 - Help Train Co-Workers on Trakstar
- Questions
 - Strengths & Weaknesses
 - Company Feedback

Check to make all feedback anonymous.
This option cannot be changed after Multi-Rater feedback has been submitted.

Remove Multi-Rater Group

Save Multi-Raters

4. Manage the Feedback

You can manage the feedback that has been requested by selecting **Manage Feedback** from the appraisal workshop at any time. Status indicators will show the progress of the Multi-Raters that have been invited to provide feedback. Send a reminder to a Multi-Rater if the request was issued but the Multi-Rater has not responded. Delete a Multi-Rater if desired.

GROUP NAME

Multi-Rater Feedback Group

	<p>Kelly Kapoor Requested 4/20/2016</p>	<div style="background-color: #0056b3; color: white; padding: 5px; display: inline-block;">100%</div> ✓ Score: 3.67
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 [View](#) • [Re-request](#) • [Remove](#) || | **Kevin Malone** Requested 4/20/2016 | 100% | [Remind](#) • [Remove](#) |


PLEASE NOTE

Your employee's appraisal must be in Scoring in order to request Multi Rater Feedback. Please contact your site administrator with questions.

Score an Employee's Appraisal

1. Locate the Employee You Want to Score

Select the employee you would like to Score by clicking on their Appraisal status bar.

Direct Reports (4) Sort by Due Date Current Future Find Direct Reports

Phylis Lapin
Notes • Profile

Sales Associate
5/6/2015 - 5/1/2016

Progress: Set Goals — **Score** — Approval — Archive by 5/1/2016

2. Select Score Appraisal from the Appraisal Workshop

You can see your progress on scoring the Employee's appraisal, as well as the employee's progress of their self-appraisal if applicable. You also have the ability to Override the self-appraisal which will remove the requester the employee to complete it.

Annual Appraisal for Phylis Lapin

Multi-Rater Feedback
1 Multi-Rater Request Sent 0% Manage Feedback

Score Appraisal

Your Status 75% 3.5

Self-Appraisal 83% ✓ 3.33 Re-request

Compare Scores Score Appraisal

3. Select a Score for Each Goal and Competency

Use the Rating Scale bar to choose a score. You will also be able to see what the Employee rated themselves if they have already completed their self-appraisal. You can also see any comments left. This is not applicable if the Employee has not completed their self-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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Jim Halpert
Phylis Lapin

Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently with little direction.

^ **Comments (1)**

Phylis Lapin
Created 8 days ago

I show great initiative on all projects assigned to be as well as any potential projects - I always volunteer to help.

Add a comment...

4. Add a Comment if Desired

Save Comments by clicking **“Add this Comment”**. Comments are optional and can include an attachment that will be linked with the appraisal.

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I show great initiative on all projects assigned to be as well as any potential projects - I always volunteer to help.

Jim Halpert

T Bold
T Italics
☰ Bullets
☰ Numbers

✓ Coaching Tips

Cancel
Attach a file
Add this comment

HELPFUL INFORMATION

Use the **Coaching Tips** to find comments a manager may use for the corresponding competency.

Click the “+” sign to copy them into the comments box.

5. Click Return to Workshop When Completed

0

Unscored Competencies

0

Unanswered Questions

< Return to Workshop

TRAKSTAR

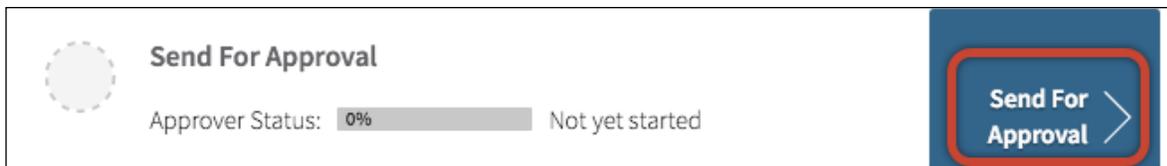
Send for Approval

1. Locate the Employee You Would Like to Send for

Hover your mouse over the Employee's Appraisal progress bar and



2. Click Send for Approval in the Appraisal Workshop



3. Choose or View Who the Appraisal Will be Routed

This step can vary based on how your Administrators have created your Company's Appraisal process.

4. Leave Any Notes for Approvers

ALL Approvers will receive the message saved in this box as an email notification.

Approver Guidance (optional) ⓘ

HELPFUL INFORMATION

- All approvers will see all submitted information, including employee, manager, and multi-rater feedback.
- Approvers can Approve/Reject Appraisals, as well as leave comments.
- Utilize **Cancel Approval** option if you chose the wrong route for approval.

Archive an Appraisal

1. Locate the Employee You Are Ready to Archive

Hover your mouse over the Employee's Appraisal progress bar and click. You can only archive an appraisal if all required steps are complete.



2. Click Archive Appraisal from the Appraisal Workshop



3. Click Archive Appraisal to finalize Archival

You can decide if you'd like to carry forward all measurements and goals on the Employee's next appraisal.

*We recommend carrying goals forward if the Employee is still working on any of the objectives. They can be edited on the new Appraisal.

