This job guide focuses on the task of the manager completing the employee performance assessment.

Access Performance Management by using your Texas State Net ID and password to logon to this site: www.hr.txstate.edu/performance-management/login.html

1. In your “To Do” tile click on “Manager fills out employee performance rating and comments.

This is step three in the assessment process and will be followed with a 1:1 meeting and the second level manager review.
GOALS

2. The assessment choices for goals are *Distinguished, Valued and Needs Improvement*. Use the drop down box to select an assessment value that corresponds to the performance of each goal for the employee.

In this example, note that the employee selected the rating of “valued” in the self-assessment. The employee also added a comment related to his completion of the goal. The manager will see the value selected in the self-assessment and any comments/notes added by the employee on the right hand side of the screen.
3. Click on the 🔄 icon beside Employee Rating, to display the attributes of *Distinguished*, *Valued* and *Needs Improvement*.

4. Determine a performance assessment for each goal listed. Add an option comment related to the assessment decision, if desired.
JOB DUTIES

5. Determine an assessment for each of the job duties listed. The number and kind of job duties that need to be assessed have been determined and agreed upon by the staff employee and the manager.

COMPETENCIES

6. The “Competency” section contains fourteen (14) competencies that the University has determined should be considered for all staff employees. The competencies are: Communication, Decision Making, Developing Others, Group Leadership, Initiative, Organizational Awareness, Problem Solving, Professional Knowledge, Project Management, Relationship Building, Teamwork, Time Management, Vision and Strategic Leadership and Work Effectiveness. As a manager determine if a competency is applicable to a team member’s particular job. Determine an assessment for each of the fourteen (14) competencies. If a competency is not applicable, choose the Not Applicable value.
Details of the competency valuations.

Entry Level:
Able to successfully complete tasks in this competency as requested. Help from others may be required from time to time, but you can usually perform the skill independently. Applied this competency to situations occasionally while needing minimal guidance to perform successfully.

Advanced Level:
Can perform the actions associated with this competency without assistance. You are recognized within your immediate organization as "a person to ask" when difficult questions arise. Capable of coaching others in the application of this competency by translating complex nuances relating to this competency into easy to understand terms.

Mastery Level:
Known as an expert in this area. You can provide guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used. You have demonstrated consistent excellence in applying this competency across the organization.

Communication
Expresses ideas and information in a clear and concise manner; tailors message to fit the interests and needs of the audience; delivers information in

Rating ☺
Advanced Level

Subjects Comments

Same toolbar available to emphasize comments and spellcheck.

Writing Assistant

If help is needed developing a comment, if a comment is desired. Click on the “Writing Assistant” button.
Communication

Expresses ideas and information in a clear and concise manner; tailors message to fit the interests and needs of the audience; delivers information in a manner that is interesting and compelling to the listener

Select topics below

<table>
<thead>
<tr>
<th>Entry</th>
<th>Advanced</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td>assumes understanding</td>
<td>actively listens</td>
<td>able to use technical terminology to</td>
</tr>
<tr>
<td>constructs documents that are hard to follow</td>
<td>allows time for proof-reading</td>
<td>help explain systems</td>
</tr>
<tr>
<td>difficult to contact</td>
<td>can write documents quickly</td>
<td>able to write professionally at a</td>
</tr>
<tr>
<td>does not adapt language to listener</td>
<td>communicates regularly with team members</td>
<td>moment's notice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>able to write with conviction and</td>
</tr>
</tbody>
</table>

After clicking the Writing Assistant, topics/links to comment suggestions will be displayed.

Click on a topic/link that is applicable and the full text will be displayed. If the text is desired for the assessment, click on the “Place Quote” button.
It is possible to select multiple statements for the self-assessment. If desired choose another item and again click the “Place Quote” button.

Note that both statements are now in the comment section. The statements can be edited if desired to make the statements more individualized for the assessment.

BEHAVIORS
7. The “Behaviors” section contains seven (7) behaviors that the University has determined should be considered for all staff employees. The behaviors are: collaboration, leadership, ownership/accountability, self-initiative, sense of empowerment, support of values, and teamwork.

Determine an assessment for each of the seven (7) behaviors. The “Writing Assistant” is also available for the behavior comments, if desired.
8. Using the drop down selection box, the manager selects an assessment value for each behavior. The manager will see the employee’s assessment to the right and any comments the employee made regarding the behavior.

The manager has the option to add comments for each behavior, if desired. The Writing Assistant is available to suggest comments for each behavior. *Comments are optional.*

**SECTION COMMENTS**

Each section (goals, job duties, competencies, behaviors) has a comment section. Rather than writing comments for each item in a section, a section comment can be written that covers the entire section.
At the end of the review document, the manager will see the “Summary” section. The summary displays each individual component of the review and the assessment value selected by the manager.

At the top right of the document, the manager has a “Supporting” and a “Gap Analysis” button. When clicking the “Supporting” button the manager will see all of the notes created for the employee throughout the evaluation period. When the “Gap Analysis” button is clicked the manager will see any differences between the employee assessment and the manager assessment. The information contained in both of the features is informational, no action is required.
Example of Supporting Notes

Team Award
04/11/2016
The SWZ project received the University team award for excellence on March 15, 2015.

Project ABC
04/11/2016
Project ABC was completed 6 weeks earlier than the project due date. The functionality has been well received on the campus.

Example of differences/gaps you could see when the manager clicks “Gap Analysis”. By clicking on one of the gap items, the manager will be directed to that behavior, competency or job duty to review the item.
9. At the very end of the assessment, the manager will make a decision if the employee is eligible for merit or not. *No longer are points assigned to an employee assessment*, the manager just determines if the employee is eligible or not for merit. Any merit decisions/award will be handled through the annual salary review process.

![Employee Merit Eligibility](image)

10. When completed with the assessment, click the “Send to 1:1 Meeting” button.

![Send to 1:1 Meeting](image)

The manager will see a second prompt to push the process to the 1:1 Meeting. The options are to cancel, which will return the manager to the review document or move forward with the 1:1 meeting.
The manager’s performance assessment is complete. It is now the responsibility of the manager to check calendars and schedule a 1:1 meeting to review the assessment with the employee.

After the 1:1 meeting is complete the next steps include a review by the second level manager and acknowledgment by employee, manager and second level manager. All of these steps occur via the workflow and email notifications are sent when the employee or manager need to perform a simple click to acknowledge the assessment.

This ends the job guide for the manager’s performance assessment. For more training guides go to the Performance Management website at: http://www.hr.txstate.edu/performance-management.html

For additional assistance please contact performancemgmt@txstate.edu or 512.245.2557. This information is available in alternate format upon request from the Office of Disability Services.