

Manager Completes Employee Performance Assessment

Step 2 in the Performance Review

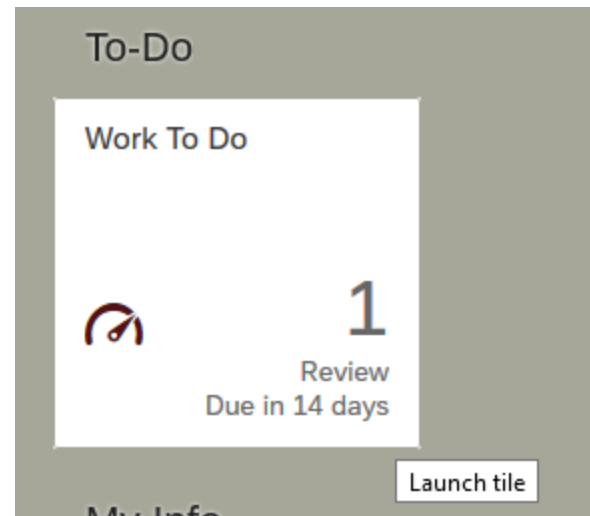


Access Performance Management by using your Texas State
Net ID and password to logon to this site:

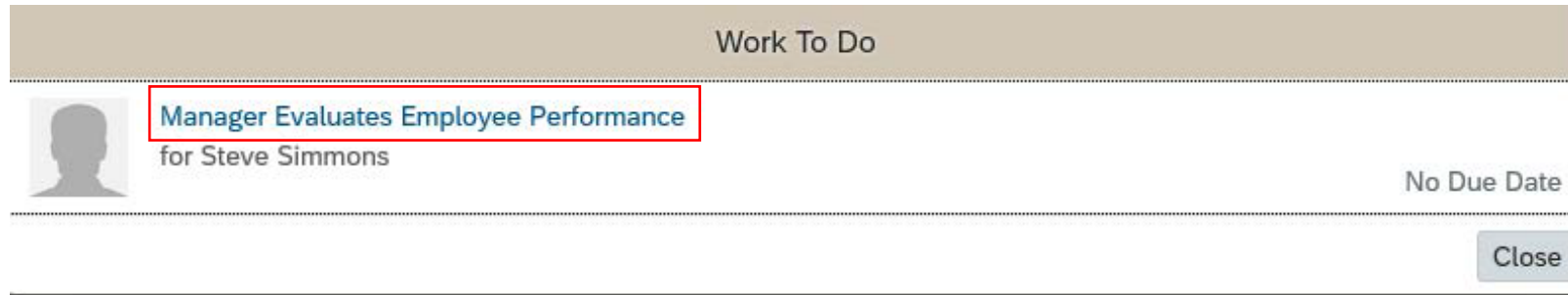
www.hr.txstate.edu/performance-management/login.html

Step 1 – Open Assessment

- Click on your “To Do” tile.



- Next, click on “Manager Evaluates Employee Performance”.



The screenshot shows a task card titled "Work To Do". On the left, there is a grey silhouette icon of a person. To its right, the text "Manager Evaluates Employee Performance" is displayed in blue, with a red rectangular box highlighting it. Below this text is "for Steve Simmons". On the right side of the card, the text "No Due Date" is visible. At the bottom right corner of the card, there is a grey button labeled "Close".


Step 2 – Assess Goals

- GOALS: Use the drop down box to select an assessment value that corresponds to the performance of each goal for the employee.


Goals & Job Duties


Evaluate each business goal established for this review period. Use the comment section as needed to describe performance expectations, how re
Assessment Definitions:

- *Achieved- The goal, task, job duty and success measures have been achieved.*
- *Active On Target - The goal is still in progress; some milestones, tasks or success measures have been achieved.*
- *Needs Improvement - Does not consistently perform tasks, job duties or make progress on assigned goals.*
- *Deferred - For timing or business reasons, this goal, task, job duty has been deferred.*

Goal 1: Promote the success of all students.
1.1 1.1Plan and implement activities aimed at improving the overall student experience and satisfaction. 

SMART Goal

Manager Rating 

Select One... 



Select One...

Goal or Job Duty Achieved

Active Goal On Target

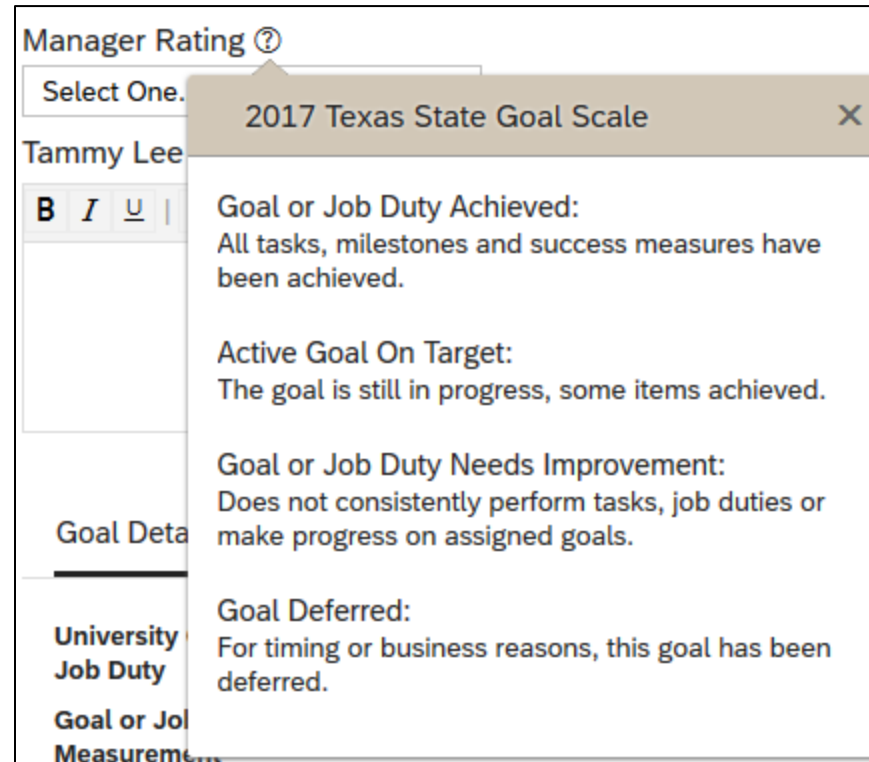
Goal or Job Duty Needs Improvement


Goal Deferred

Size  | A-Z 

Goal Details Other Details

- Goals: Click on the  icon beside Manager Rating, to display the attributes of each rating.



Manager Rating 

Select One.


Tammy Lee

B *I* U |

Goal Deta

University
Job Duty

Goal or Jo
Measureme...

2017 Texas State Goal Scale 

Goal or Job Duty Achieved:
All tasks, milestones and success measures have been achieved.

Active Goal On Target:
The goal is still in progress, some items achieved.

Goal or Job Duty Needs Improvement:
Does not consistently perform tasks, job duties or make progress on assigned goals.

Goal Deferred:
For timing or business reasons, this goal has been deferred.

- Determine a performance assessment for each goal listed. Add a comment related to the assessment decision, if desired.

Manager Rating ?

Active Goal On Target ▼

Tammy Lee Coyle's Comments

B *I* U | | Size ▼ | A-z |

|

Step 3 – Assess Job Duties

- JOB DUTIES: 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.

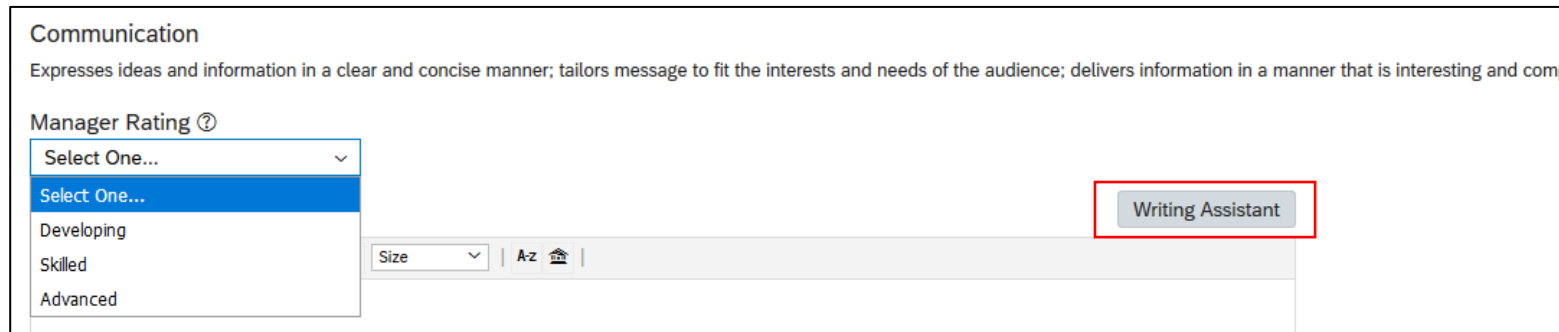
The screenshot shows a web application interface for assessing job duties. At the top, it says "Job Duties". Below that, there is a specific duty listed: "5.1 Answer phones 3 rings" with a small edit icon. Underneath, the text "Answer phones 3 rings" is repeated. The main section is titled "Manager Rating" with a help icon. A dropdown menu is open, showing four options: "Select One..." (highlighted in blue), "Goal or Job Duty Achieved", "Active Goal On Target", "Goal or Job Duty Needs Improvement", and "Goal Deferred". To the right of the dropdown, there are controls for "Size" (a dropdown), "A-z" (a button), and a home icon.

Step 4 – Assess Competencies

- Competencies: Determine an assessment for each of the seven (7) competencies.
- Competencies that the University has determined should be considered for all staff employees. The competencies are:
Communication, Customer Service, Decision Making, Problem Solving, Professional Knowledge, Time Management, and Work Effectiveness.

The screenshot displays a web interface for assessing competencies. At the top, a grey header reads "Competency". Below it, a blue italicized sentence states: "Competencies are a set of defined knowledge, skills and abilities that a". Underneath, the section "Assessment Definitions" is followed by a bulleted list of three levels: "Advanced - Has broad and deep understanding and skills, w motivates others to excel.", "Skilled - Has sufficient understanding and experience to ope", and "Developing - Newly developing in this area, has a general u". A horizontal separator line is present. Below, the "Communication" competency is defined as "Expresses ideas and information in a clear and concise manner; tailors mess". A "Manager Rating" section with a help icon contains a dropdown menu. The dropdown is open, showing "Select One..." at the top, followed by "Developing", "Skilled", and "Advanced". To the right of the dropdown are controls for "Size", "A-z", and a home icon.

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



- 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.

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 or reader.

Select topics below

Developing	Skilled	Advanced
<ul style="list-style-type: none">▪ assumes understanding▪ constructs documents that are hard to follow▪ difficult to contact▪ does not adapt language to listener	<ul style="list-style-type: none">▪ actively listens▪ allows time for proof-reading▪ can write documents quickly▪ communicates regularly with team members	<ul style="list-style-type: none">▪ able to use technical terminology to help explain systems▪ able to write professionally at a moment's notice▪ able to write with conviction and

Describe Behavior Give Advice

Select a Narrative:

Steve You

Preview Quote Below

Steve maintains regular communication with team members. Steve responds to requests and questions in a timely manner, and proactively shares information, facts and ideas that Steve thinks might be useful to

Close Place Quote

Step 5 – Assess Behaviors

- The “Behaviors” section contains four (4) behaviors that the University has determined should be considered for all staff employees. The behaviors are: *leadership, ownership/accountability, initiative, collaboration and teamwork.*

Behaviors

Behaviors are a set of actions that describe how one performs their job and conducts themselves as a Texas State employee.

Assessment Definitions:

- *Consistently Observed - This behavior is observed on a constant basis; everyone in contact with this person would observe excellence in this area.*
- *Frequently Observed - This behavior is observed frequently.*
- *Sometimes Observed - This behavior is observed on an infrequent basis; this is a development opportunity.*
- *Rarely Observed - This behavior needs improvement.*

Assess Behaviors

- Behaviors: Provide an assessment for each of the four (4) behaviors. The “Writing Assistant” is also available for the behaviors comments, if desired.

Leadership

Actively supports organizational goals and values; demonstrates enthusiasm toward the company's goals and mission; aligns actions around organizational goals. Invests time and resources into building the capabilities of team members; helps people define career goals and establish development plans to achieve them; gives people constructive feedback and advice. Emphasizes the importance of people's contributions; lets people know why their work is important and how it will benefit themselves and others; ties work activities to people's personal career goals and life interests. Identifies and articulates the strategic goals and direction of the university, division, or work team.

Manager Rating ?
Sometimes Observed ▼

Tammy Lee Coyle's Comments Writing Assistant

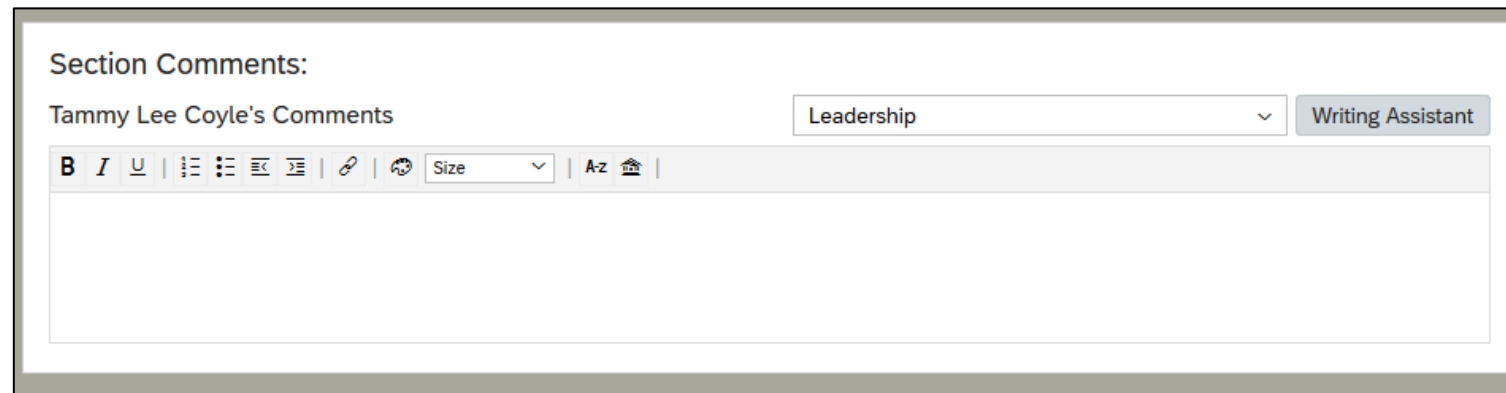
B *I* U | | Size ▼ | A-z

Steve does things that could be seen as violations of the organization's values. Steve feels they are effective even though they may break protocol.

Ratings from Others
There are no Ratings from Others.

- SECTION COMMENTS:

- Each section (goals, job duties, competencies, behaviors) has a comment section. Rather than writing comments for each component of a section, a section comment can be written that covers the entire section.



The screenshot shows a web form titled "Section Comments:". Below the title, the text "Tammy Lee Coyle's Comments" is displayed. To the right of this text is a dropdown menu with "Leadership" selected and a "Writing Assistant" button. Below these elements is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, size, and A-Z. The main text area of the editor is currently empty.

- 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.

*Merit eligibility is determined with your review. However, any merit award must be approved through the salary review process.

* **Merit Decision** →

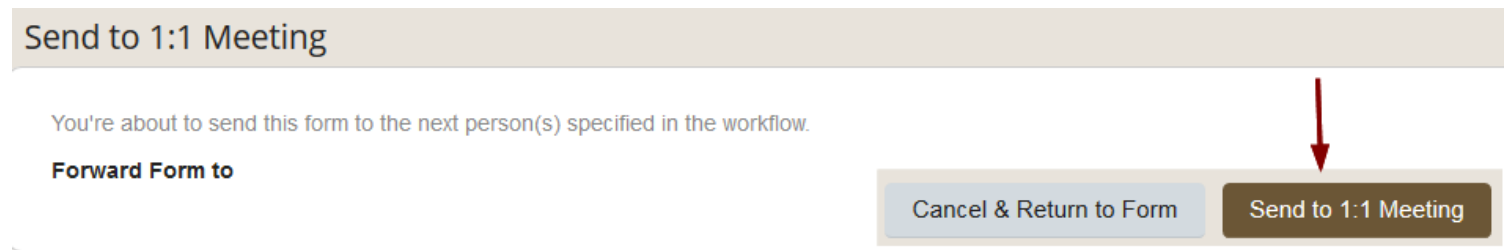
Eligible for Merit

Not Eligible

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



- 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.

Contacts

Email: performancemgmt@txstate.edu

Phone: 512.245.2557.

This information is available in alternate format upon request from the Office of Disability Services.

