

Score Your Employee's Appraisal

1. Select the employee you will be scoring

The status bars on your Home page will indicate any employee who is currently in the scoring mode. Click on **Score** to proceed to the appraisal.

The screenshot shows the TRAKSTAR Home page for user Jim Halpert. The 'My Appraisals' section displays a 'Current Appraisal' with a due date of 7/13/2016 and a period of 7/2/2014 - 7/13/2016. Below this, the 'Direct Reports (4)' section lists employees with their appraisal status. Phylis Lapin is highlighted with an orange circle, and her status bar shows 'Score' as the active step. Stanley Hudson is also listed with a status bar showing 'Scorable' as the active step.

2. Select Score Appraisal

Here you can see the status of the employee's self appraisal if one is required.

The screenshot shows the 'Appraisal Workshop' page for Phylis Lapin. The page displays the 'Annual Appraisal for Phylis Lapin' with a 'Score Appraisal' section. The 'Your Status' is 0%, and the 'Self-Appraisal' is 100% with a score of 3.33. A 'Re-request' button is visible. A 'Score Appraisal' button is highlighted with an orange circle. Below this, the 'Send For Approval' and 'Archive Appraisal' sections are visible, both with 'Send For Approval' and 'Archive Appraisal' buttons.


3. Select a level from the rating scale

You are required to select a rating for all Competencies and Goals on the appraisal. By rolling over the rating bar you can view any scores that have been submitted in the self appraisal.

Annual Appraisal for Phylis Lapin

Position Description

Position Description

 **Manage Goals and Notes**

2 Unscored Competencies

0 Unanswered Questions

[Return to Workshop](#)

Core Values 50%


Judgment 33.3%

Able to make decisions that are sound, accurate, timely and supported by the reasoning and inclusion of others.


Not Effective	Minimally Effective	Effective	Highly Effective	Exceptional
		Jim Halpert	Phylis Lapin	

4. Add a comment

^ **Comments (1)**

 **Phylis Lapin**
Created 3 minutes ago

I think my judgment is very sound and I am highly effective at making choices when it comes to tough deadlines and client decisions.

 **Jim Halpert**

T Bold | *T* Italics |

-

 Bullets |

- 1.1.1

 Numbers

I agree, your judgement is sound. I reviewed all case files and they are in good order with company policy and keeping customer interests in mind.

✓ Coaching Tips

Cancel
Attach a file
Add this comment

5. Return to Workshop once Appraisal is complete

✓ Scoring Complete

Appraisal Workshop / Score Appraisal

Annual Appraisal for Phylis Lapin

Position Description Manage Goals and Notes

Position Description

0 Unscored Competencies 0 Unanswered Questions

[Return to Workshop](#)

6. Select Send for Approval

This step will vary depending on your organization's settings. If no Approval is required proceed to Archiving the appraisal.

Appraisal Workshop

Annual Appraisal for Phylis Lapin

Score Appraisal

✓ Your Status: 100% ✓ 3

Self-Appraisal: 100% ✓ 3.33 Re-request

Compare Scores

Send For Approval

Approver Status: 0% Not yet started

[Send For Approval](#)

Archive Appraisal



The appraisal cannot be archived until it has been approved.

Archive Appraisal

7. Send for Approval

The approver list will be based on your organization's settings. Once you select **Send for Approval** the appraisal will be locked and can not be altered.

Appraisal Workshop / Send for Approval

**Manager, HR**
(Not yet saved)

Approver Guidance (optional) ⓘ

Send for Approval

APPROVER GUIDANCE

If you would like to add guidance for approvers please enter it here. Otherwise leave it blank as it is an optional field. Please note, if employee acknowledgement is part of the route for approval this will not be sent to them.



PRESENT APPRAISAL TO THE EMPLOYEE


Once you have all necessary approvals you will present the appraisal to your employee in accordance to your organization's schedule.

8. Archive the Appraisal

Select **Archive Appraisal** to close out this appraisal period and finalize the document. Please note, upon archiving the employee will be able to view their appraisal, including your scores and comments.


Appraisal Workshop


Annual Appraisal for Phylis Lapin

 **Score Appraisal**


Your Status **100%** ✓ 3


Self-Appraisal **100%** ✓ 3.33

 [Compare Scores](#)

 **Send For Approval**

Approver Status **100%** ✓

 **Archive Appraisal**

 [Print Final Appraisal](#)

Score Appraisal >

Manage Approval >

Archive Appraisal >

9. Confirm Archive

Determine if you would like to carry forward the goals and measurements from the current appraisal onto the next appraisal document. Confirm **Archive Appraisal**.

Archive Appraisal

Final Score: 3

You have the option to carry forward the measurements, goals and weights to the next appraisal:

Do not carry forward all measurements, goals and weights in this appraisal to the next appraisal

Carry forward all measurements, goals and weights in this appraisal to the next appraisal

Next Appraisal Date: **9/29/2016 (Annual)**

Cancel **Archive Appraisal**