



MANAGER GUIDE

INFOR PERFORMANCE APPRAISALS

Step-by-Step Guide



FY 2024

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INFOR NAVIGATION GUIDE

Check out this section to view step-by-step instructions on creating a performance appraisal and submitting it to your Upline Manager.

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UPLINE APPROVAL GUIDE

Do you manage other managers? You'll likely need to approve performance appraisals submitted by them. Get step-by-step instructions on how to approve here.

APPENDIX 1

EXTRA HELP NAVIGATING THE INFOR LAYOUT

Want to learn more about various buttons and how to view the performance appraisal in its final form? View the appendix.



OVERVIEW OF PERFORMANCE APPRAISALS

TIMELINE & KEY DATES

SEPTEMBER 27TH - OCTOBER 9TH

200 & 300 level employees may complete a voluntary self -assessment form. These forms are turned in **directly** to the **supervisor** and are due no later than **October 9th**.

OCTOBER 7TH

Departments will begin working on Evaluation Spreadsheets (sent to Directors). Supervisors may begin creating draft evaluations in Infor. Do not submit for upline approval until ELT has reviewed and finalized (**Late Nov/Early Dec**).

NOVEMBER 1ST

Department Evaluation Spreadsheets with proposed rating for each employee are due to Human Resources. Must be submitted by Director or designee.

DECEMBER 2ND

Performance Evaluation sheets are returned to departments with edits. **After clearance from Director, the supervisors may begin meeting with Employees and submitting reviews for upline approval in Infor.**

DECEMBER 16TH

All performance conversations should have been held with employees.

JAN 1, 2025

Merit Raises will take effect. (HR will do Form 12s this year). First paycheck with merit raises will be Jan 17th.

JAN 17, 2025

Deadline to have all employee acknowledge performance evaluations in Infor system.



OVERVIEW OF PERFORMANCE APPRAISALS

ELIGIBILITY

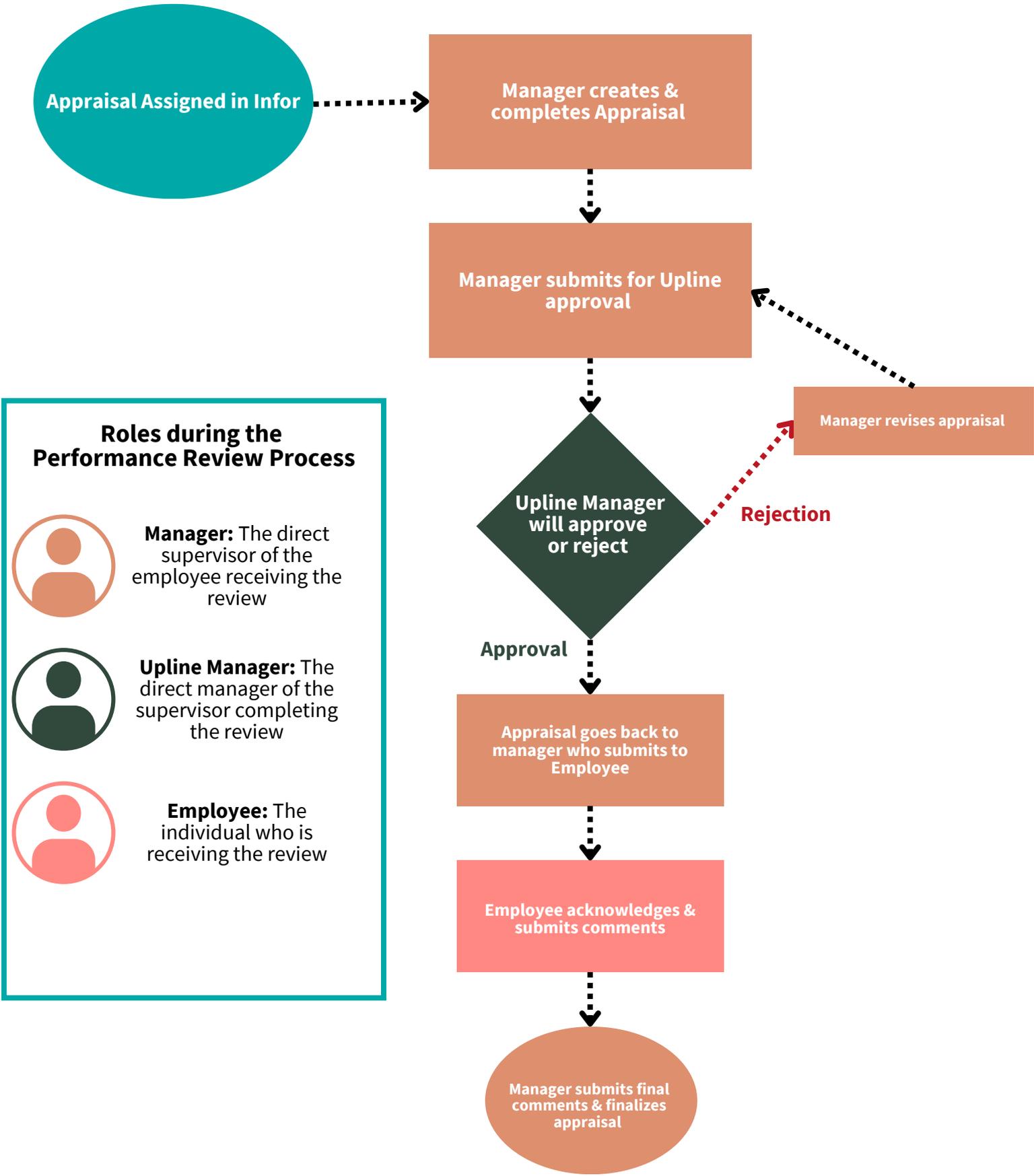
- ALL FULL-TIME & PART TIME **CIVILIAN** EMPLOYEES
- HIRED ON OR BEFORE **03/31/2024**
- FORM MUST BE COMPLETED BY **CURRENT**, IMMEDIATE SUPERVISOR

RATING SCALE



PIPS (PERFORMANCE IMPROVEMENT PLANS)

- GIVEN WHEN THE **OVERALL** RATING IS A 1.
➤ AT SUPERVISOR DISCRETION FOR OVERALL RATING OF 2
- SUPERVISORS MUST COORDINATE WITH **EMPLOYEE RELATIONS**
- FORM MUST BE **SEPARATE DOCUMENT FROM APPRAISAL**
➤ IMPROVEMENT PLANS SHOULD NOT BE WRITTEN WITHIN THE APPRAISAL DOCUMENTS.
- **ORGANIZATIONAL DEVELOPMENT** CAN ASSIST WITH ASSIGNING/RECOMMENDING TRAININGS, IF NEEDED.



Roles during the Performance Review Process



Manager: The direct supervisor of the employee receiving the review



Upline Manager: The direct manager of the supervisor completing the review



Employee: The individual who is receiving the review

FIRST STEP: LOGIN INTO INFOR

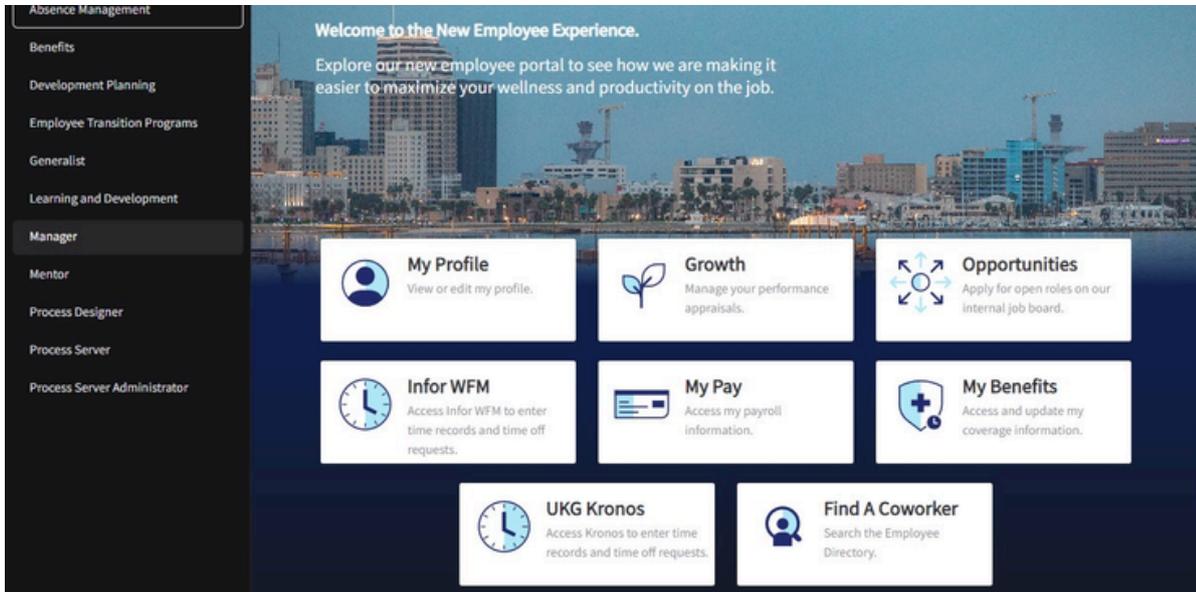


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

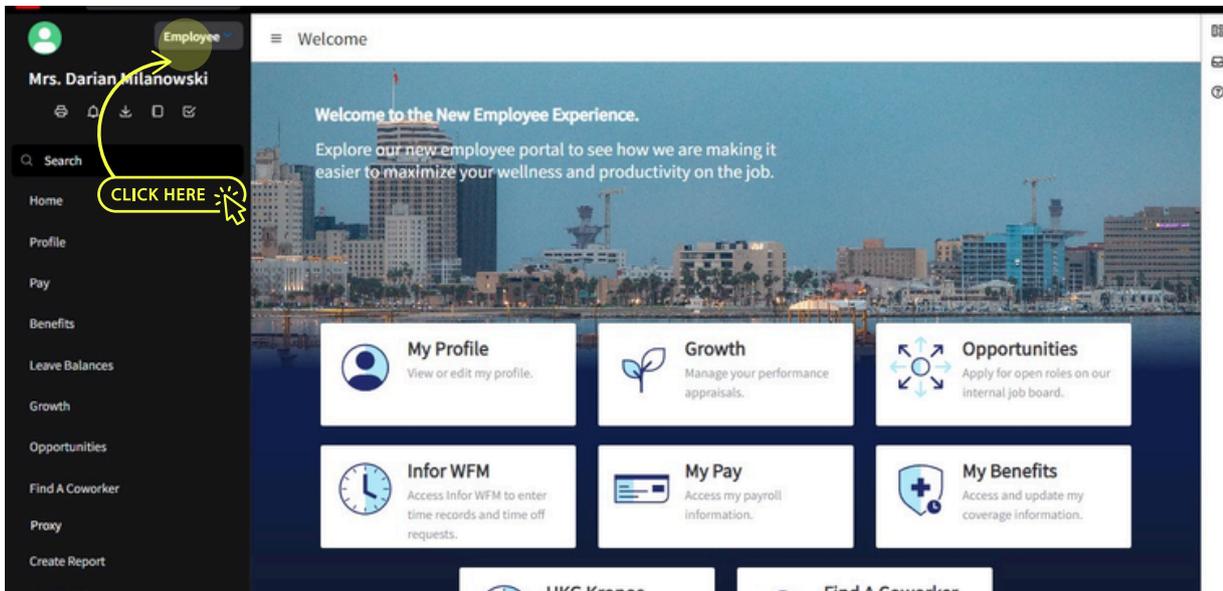


Diagram 2 : Left Hand Bar Dropdown



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

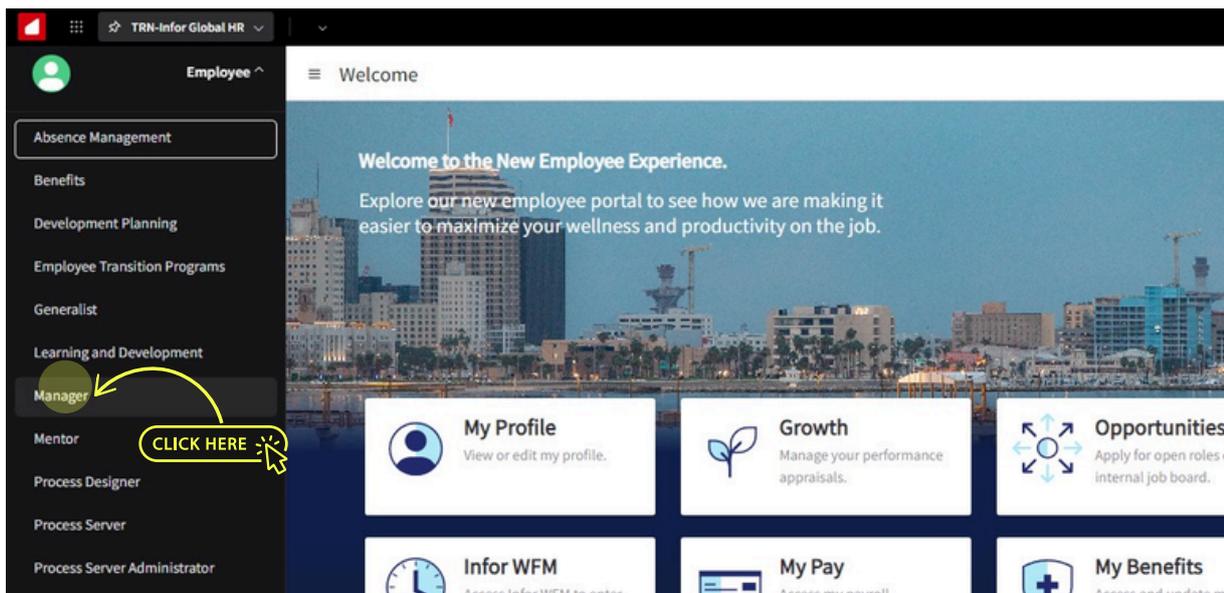


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “REVIEW PERFORMANCE”

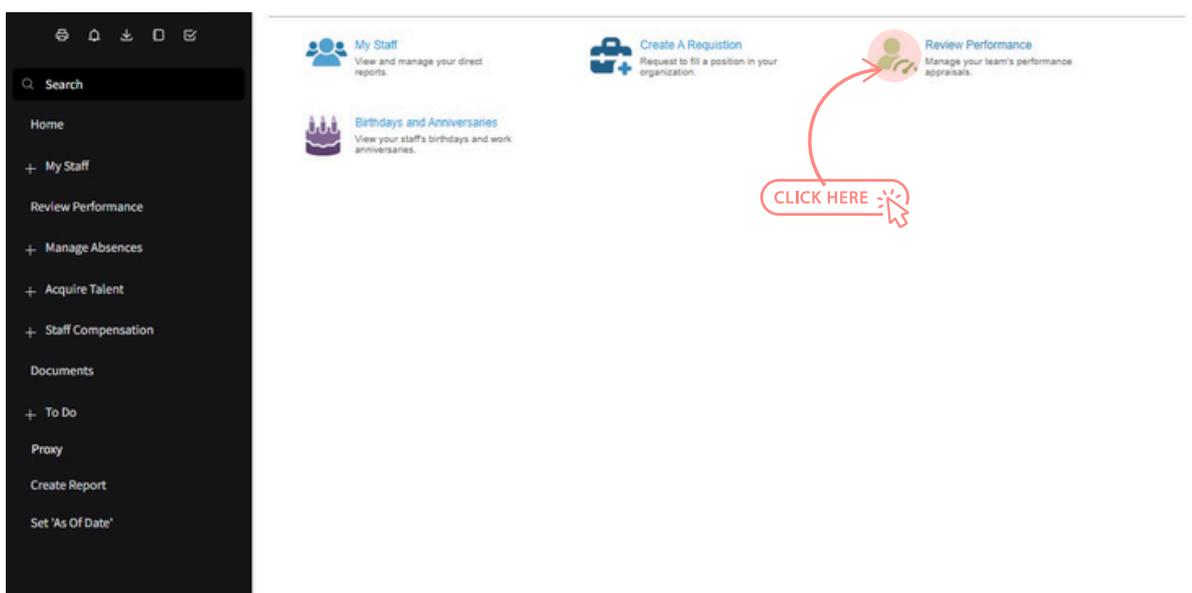


Diagram 4 : Manager Space

|| NO REVIEWS? CLICK REFRESH

GO SEE REVIEWS? SKIP TO NEXT STEP

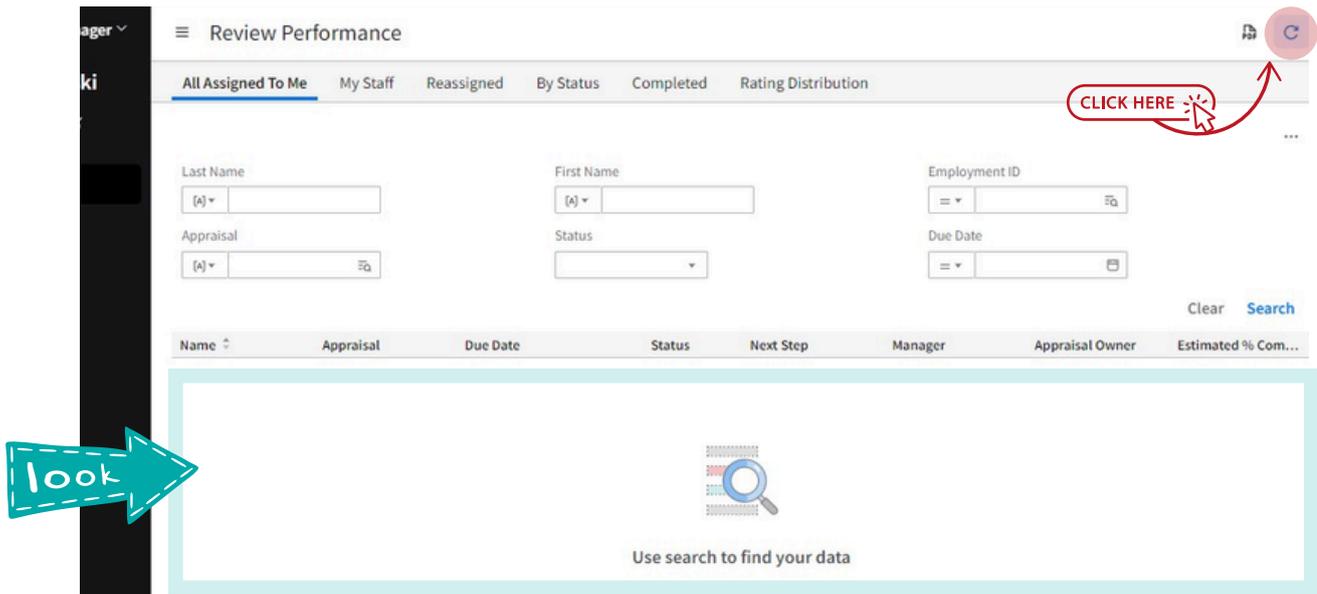


Diagram 5 : Performance Dashboard

DOUBLE-CLICK ON THE EMPLOYEE

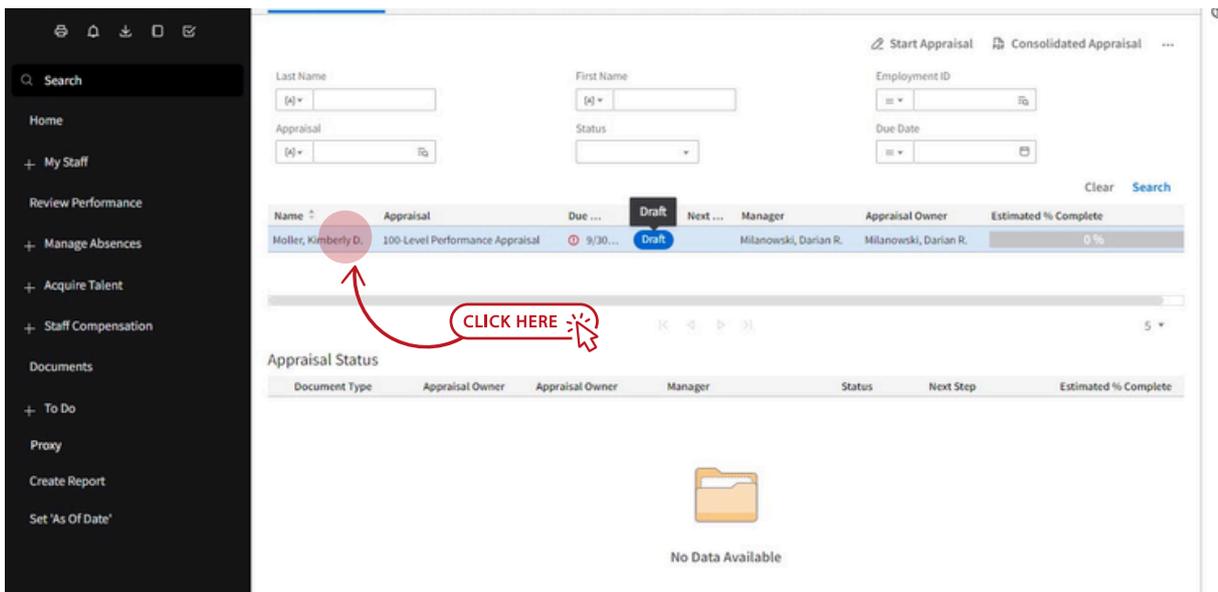


Diagram 6 : Performance Dashboard

CLICK "START APPRAISAL"

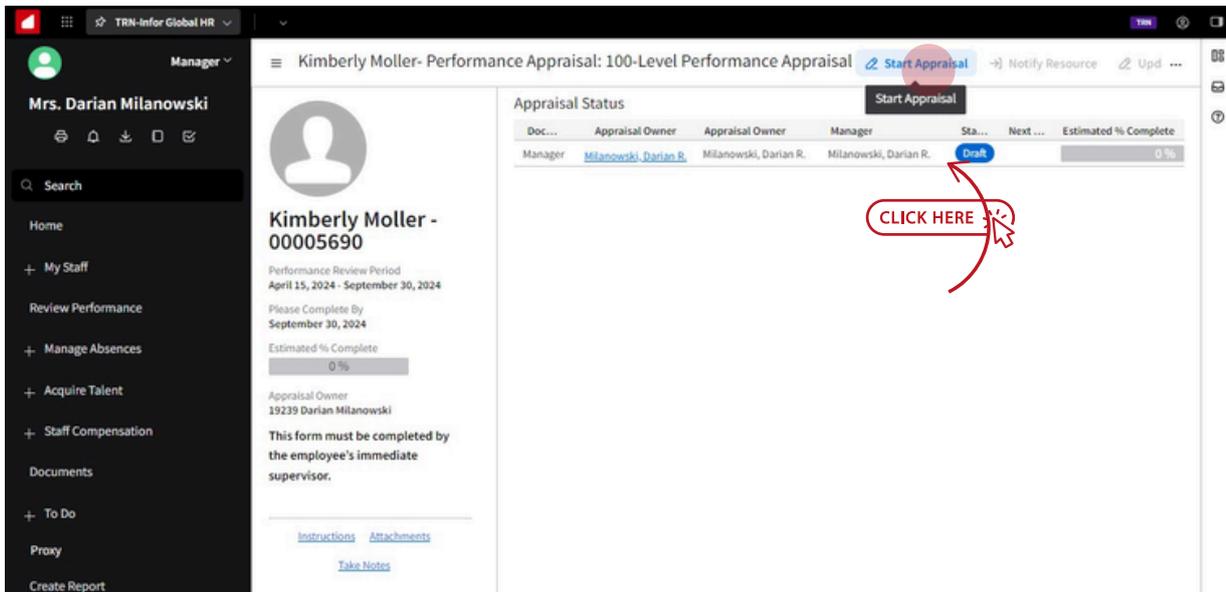


Diagram 7: Employee Performance Start Screen

SELECT THE RATING FOR EACH CRITERIA. ALL CRITERIA MUST HAVE A RATING TO SUBMIT.

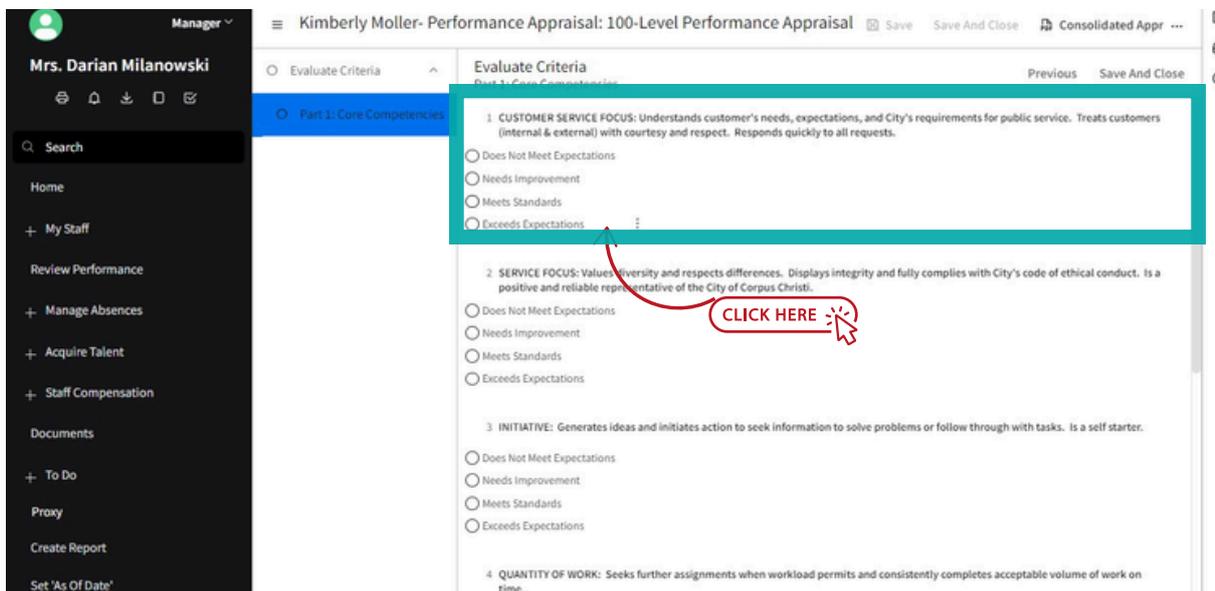


Diagram 8 : Performance Appraisals

AT THE BOTTOM - CLICK IN THE TEXTBOX FOR "OVERALL SECTION COMMENTS". SECTION COMMENTS ARE MANDATORY; HOWEVER; YOU MAY ELECT TO KEEP SECTION COMMENTS BRIEF.

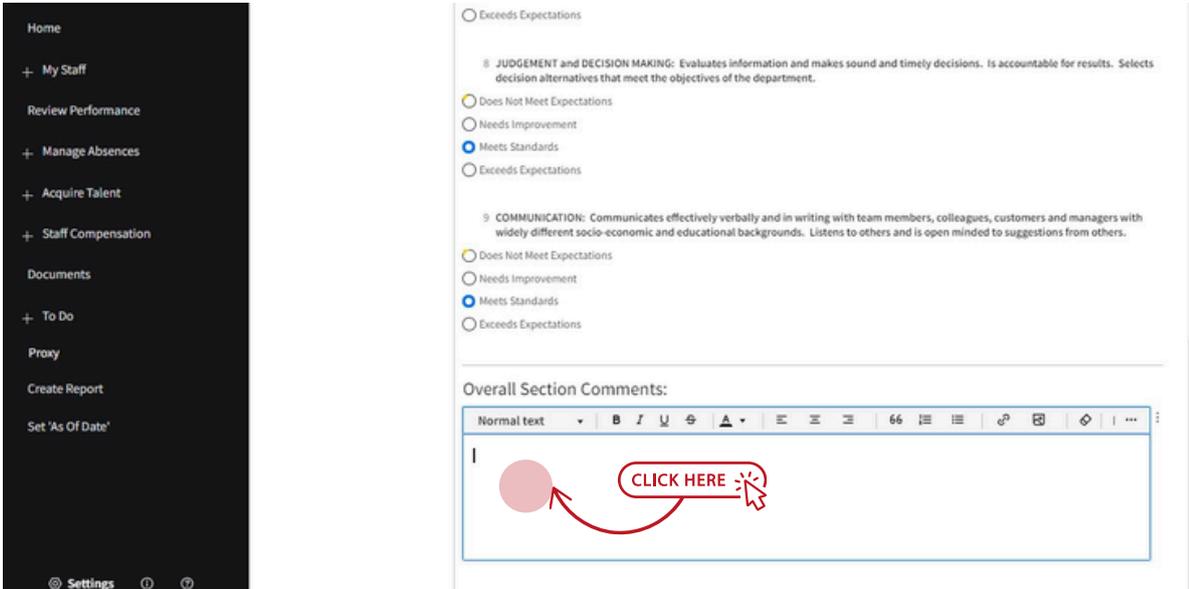
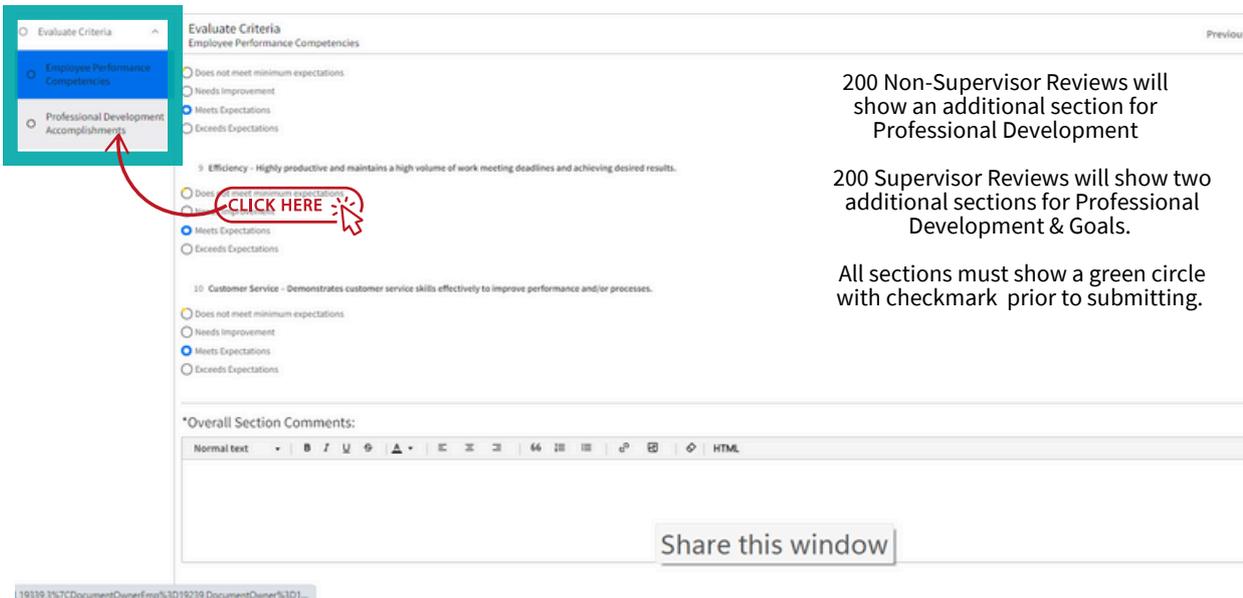


Diagram 9: Overall Section Comments

|| ARE YOU REVIEWING A 100 EMPLOYEE? SKIP THIS STEP

GO RATING A 200 EMPLOYEE? CONTINUE



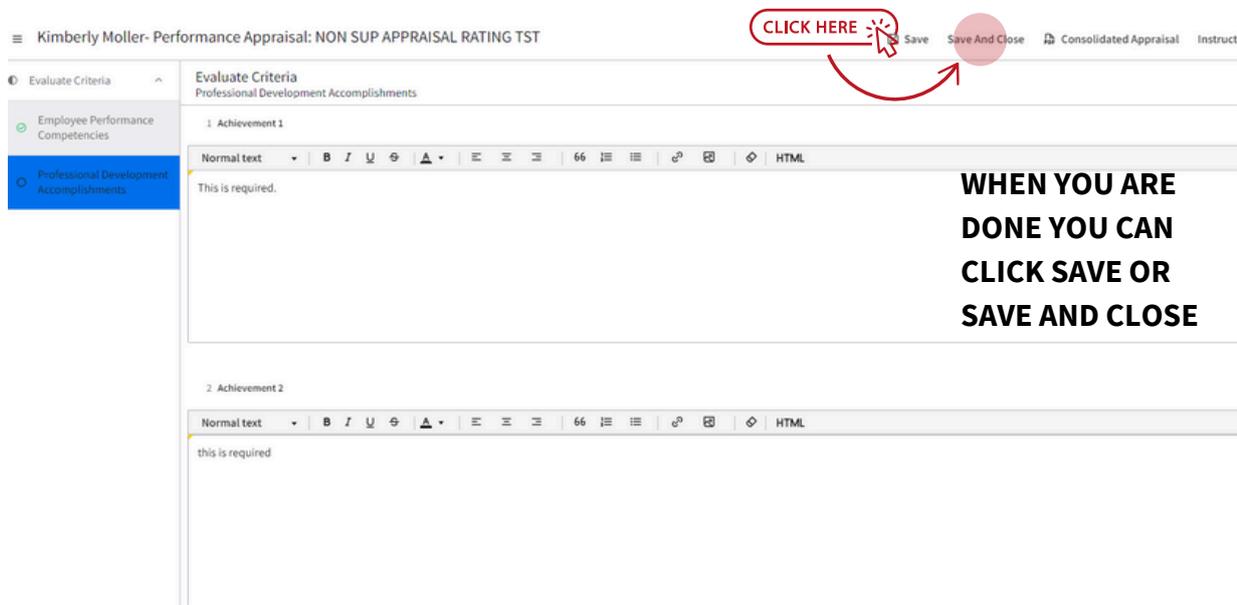
200 Non-Supervisor Reviews will show an additional section for Professional Development

200 Supervisor Reviews will show two additional sections for Professional Development & Goals.

All sections must show a green circle with checkmark prior to submitting.

Diagram 10: Section Box

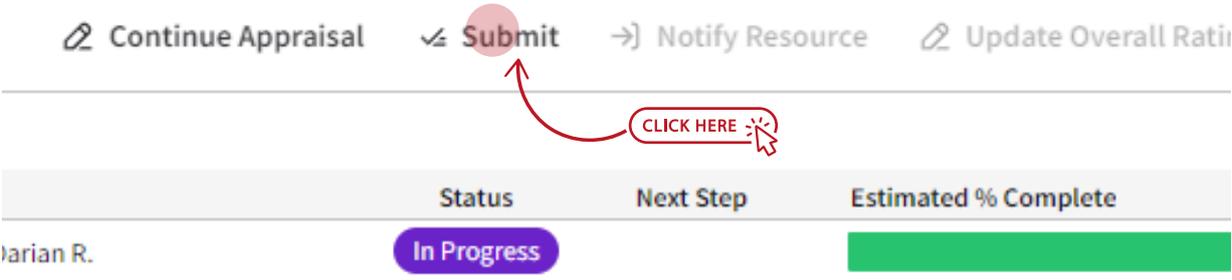
WHEN YOU ARE DONE, CLICK SAVE AND CLOSE.



WHEN YOU ARE DONE YOU CAN CLICK SAVE OR SAVE AND CLOSE

Diagram 11: Saving Performance Reviews

CLICK ON SUBMIT TO ENTER PRE-UPLINE APPROVAL STATUS This will not submit to your upline manager, you can still edit if needed



Verify the estimated completion is at 100%. If not, click continue appraisal and ensure all sections are completely filled out. When you're ready, click submit.

Diagram 12: Submission Screen



DO NOT SUBMIT TO UPLINE MANAGER UNTIL YOUR DEPARTMENT RECEIVES ELT APPROVAL.

CLICK SUBMIT TO UPLINE MANAGER

Revert To In Progress Notify Resource Update Overall Rating **Submit To Upline Manager**

Appraisal Owner	Manager	Status	Next Step	Estimated % Complete
Milanowski, Darian R.	Milanowski, Darian R.	Ready For Review		100

THE STATUS SHOULD CHANGE TO “READY FOR REVIEW”

Diagram 13: Upline Manager

WHEN SUCCESSFULLY SUBMITTED, THE STATUS WILL TURN ORANGE. NOW YOU WILL WAIT FOR UPLINE APPROVAL.

Status	Next Step	Es
Pending Acknowledgment		

Diagram 14: Upline Approval Success

FIRST STEP: LOGIN INTO INFOR

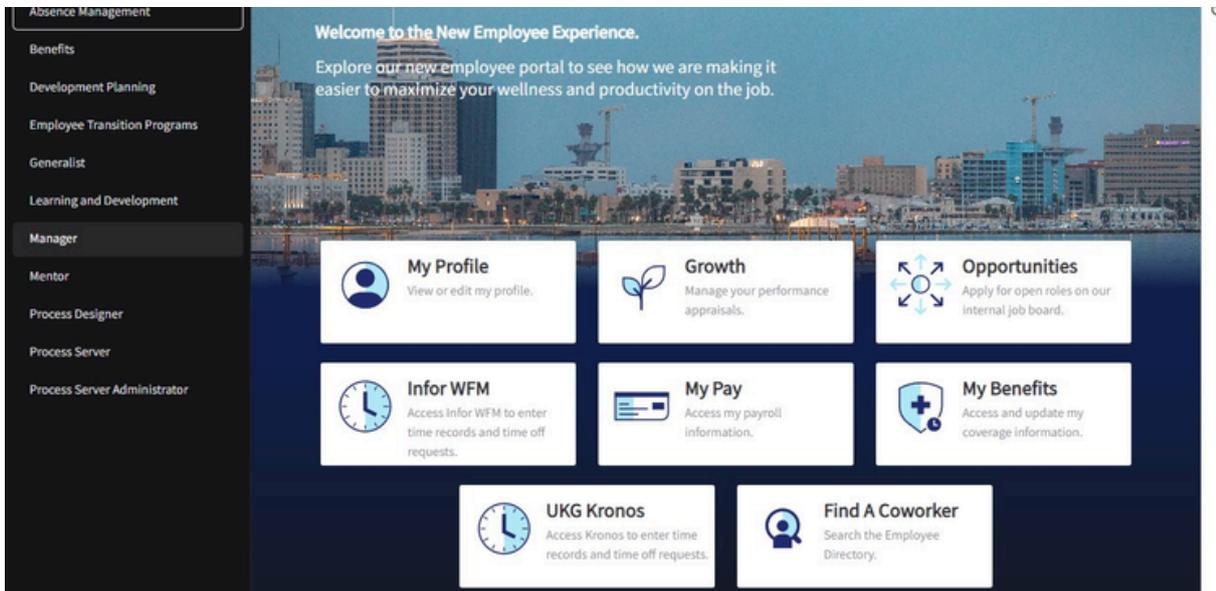


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

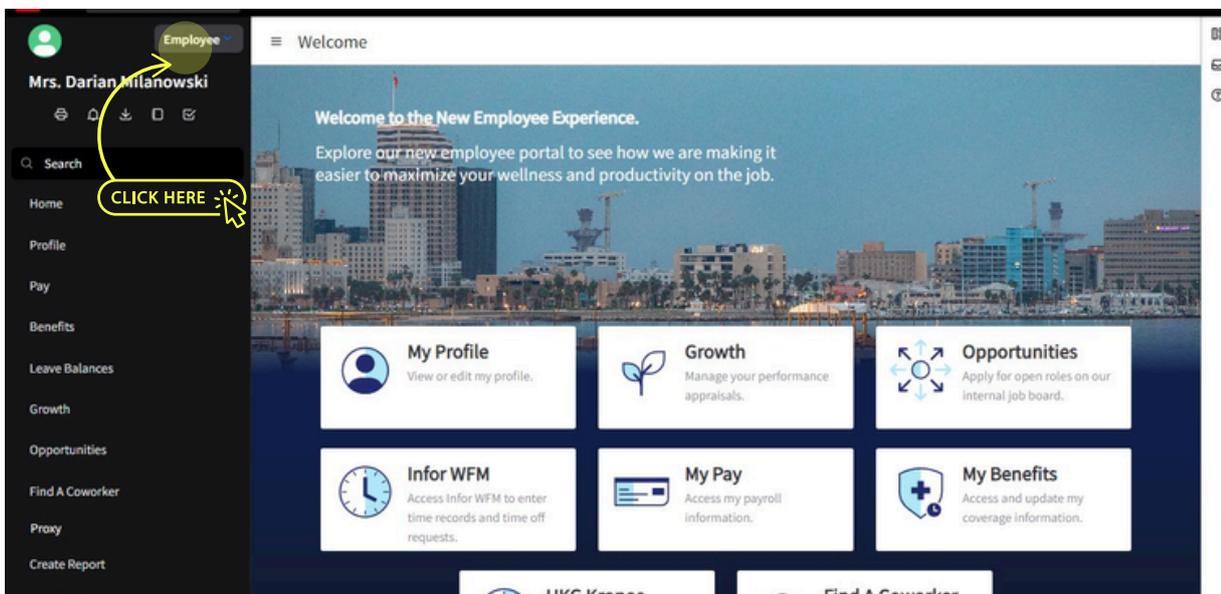


Diagram 2 : Left Hand Bar Dropdown



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

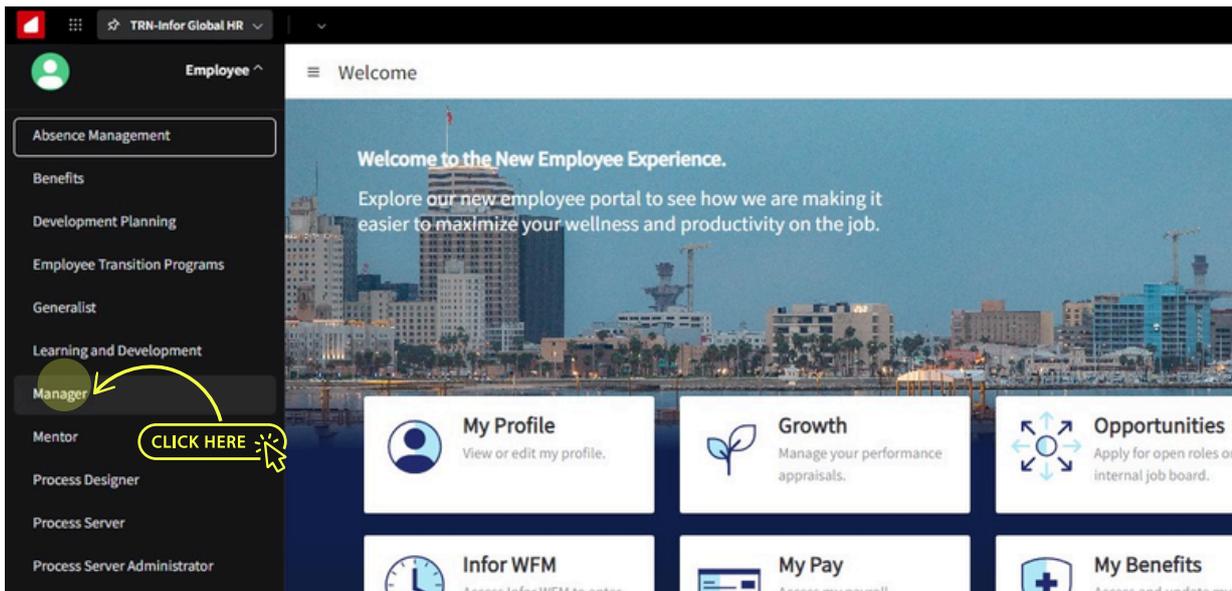


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “NOTIFICATIONS”

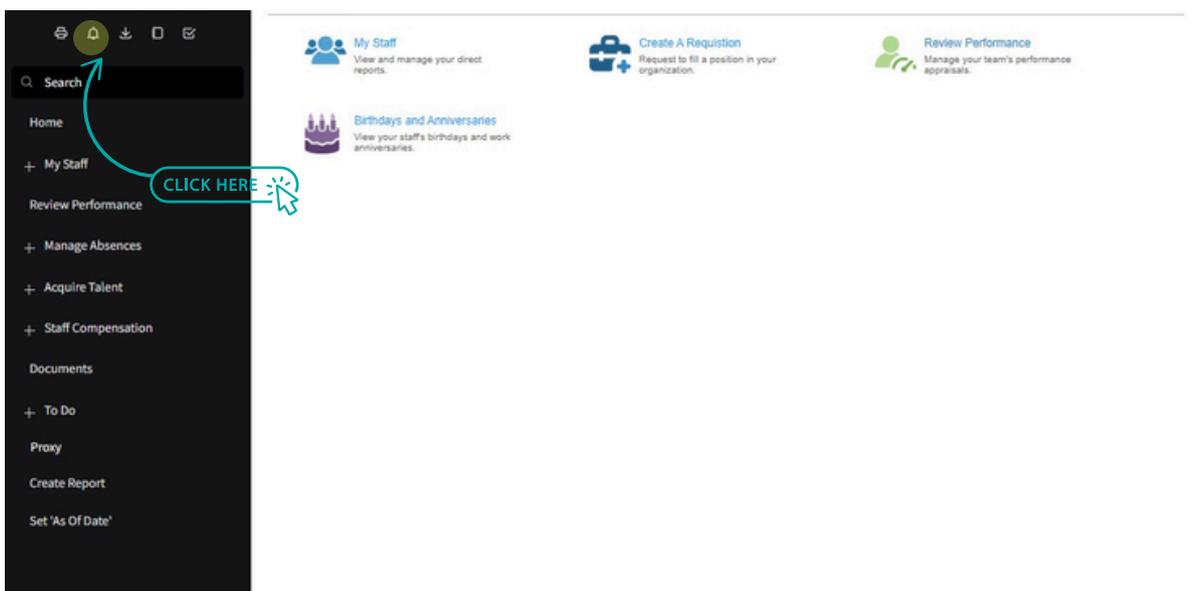


Diagram 4 : Manager Space

IF APPROVED, YOU MAY CLICK APPROVE. IF NOT, PLEASE REJECT.



Diagram 7 : Upline Approval Screen Part 2

THE APPRAISAL WILL GO BACK TO THE MANAGER FOR CORRECTION IF REJECTED.

IF APPROVED, IT WILL GO BACK TO THE MANAGER SO THEY CAN HAVE THE EMPLOYEE ACKNOWLEDGE.

AFTER MEETING WITH EMPLOYEE, MANAGER WILL SUBMIT APPRAISAL TO EMPLOYEE FOR SIGNATURE

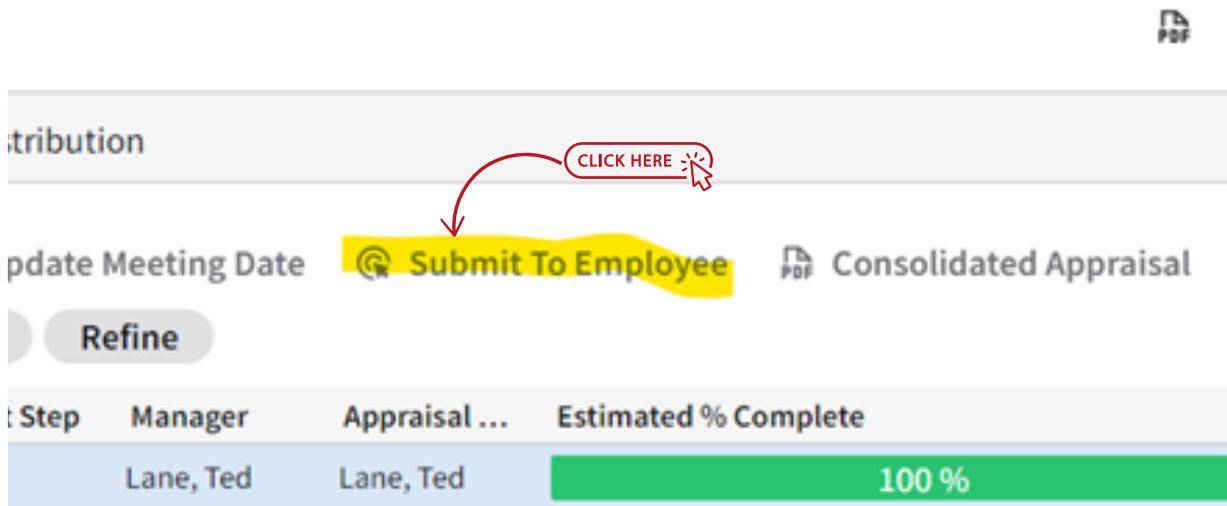
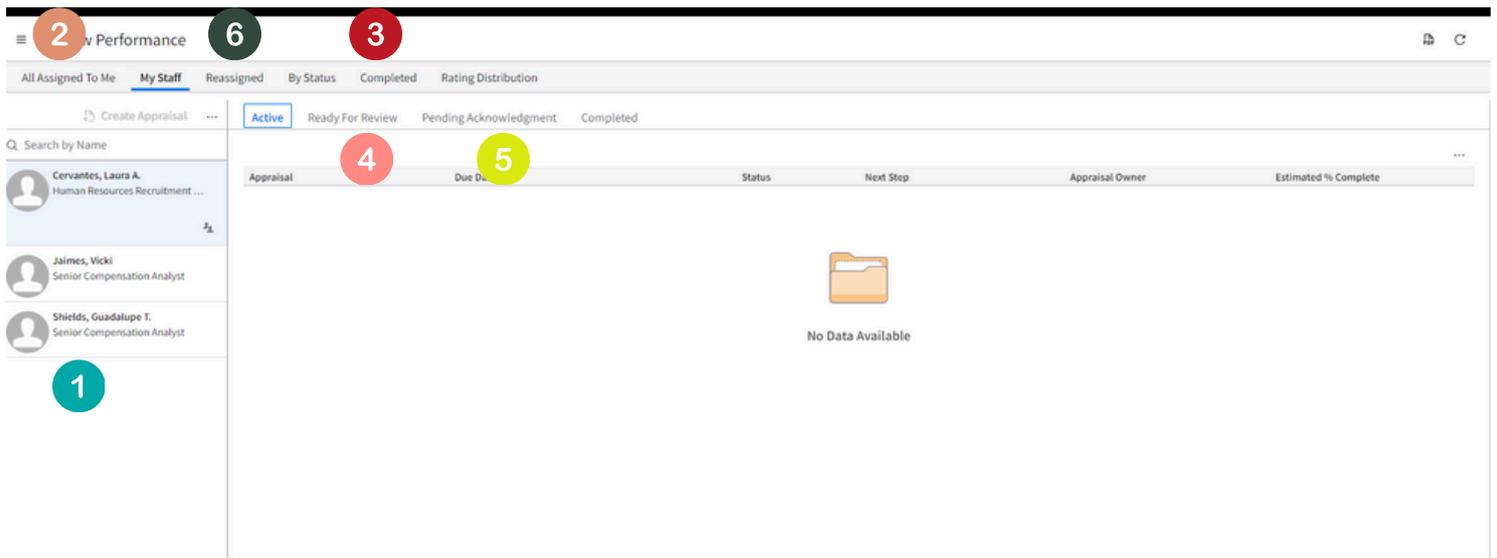


Diagram 1 : Submit to Employee

AFTER EMPLOYEE SUBMITS THEIR COMMENTS AND ACKNOWLEDGEMENT: THE MANAGER WILL RECEIVE THE EMPLOYEE'S ACKNOWLEDGEMENT AND COMMENTS IN THEIR INBOX FOR A FINAL ACKNOWLEDGEMENT AND COMMENTS.

APPENDIX 1

Questions?
Email performancereviews@cctexas.com



1 Left Bar: View by Team Member

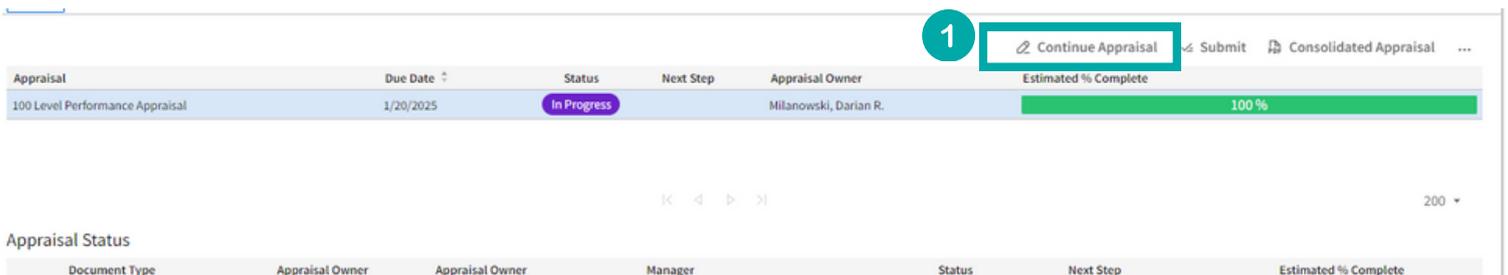
2 View all Appraisals Assigned to You

3 View all Completed Appraisals Assigned to You

4 View all Appraisals Ready for Review

5 View All Appraisals Pending Acknowledgment

6 View all Appraisals that have been Reassigned



1 Click here to view Appraisal. It will download as a PDF.

Overall Calculated Scores			
Section		Score	Weight
Part 1: Core Competencies		2.44	100.00

Overall Score: 2.44

Overall Rating: 2 - Needs Improvement

At the bottom of the last page, you will see an Overall Score.

It will display the score per section. The raw score and then the rounded score with the final rating.