



MANAGER GUIDE

INFOR PERFORMANCE APPRAISALS

Step-by-Step Guide



FY 2025

 learningcc.org

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SECTION 3

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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.

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MANAGER FINAL STEPS

All front-line managers must complete these steps after upline approval.

APPENDIX 1

EXTRA HELP NAVIGATING THE INFOR LAYOUT

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



OVERVIEW OF PERFORMANCE APPRAISALS

TIMELINE & KEY DATES

SEPTEMBER 26TH - OCTOBER 8TH

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 6TH

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**).

OCTOBER 31ST

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

DECEMBER 1ST

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 15TH

All performance conversations should have been held with employees.

JAN 6, 2026

Merit Raises will take effect. (HR will do Form 12s this year). First paycheck with merit raises will be Jan 16th.

JAN 16, 2026

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



OVERVIEW OF PERFORMANCE APPRAISALS

ELIGIBILITY

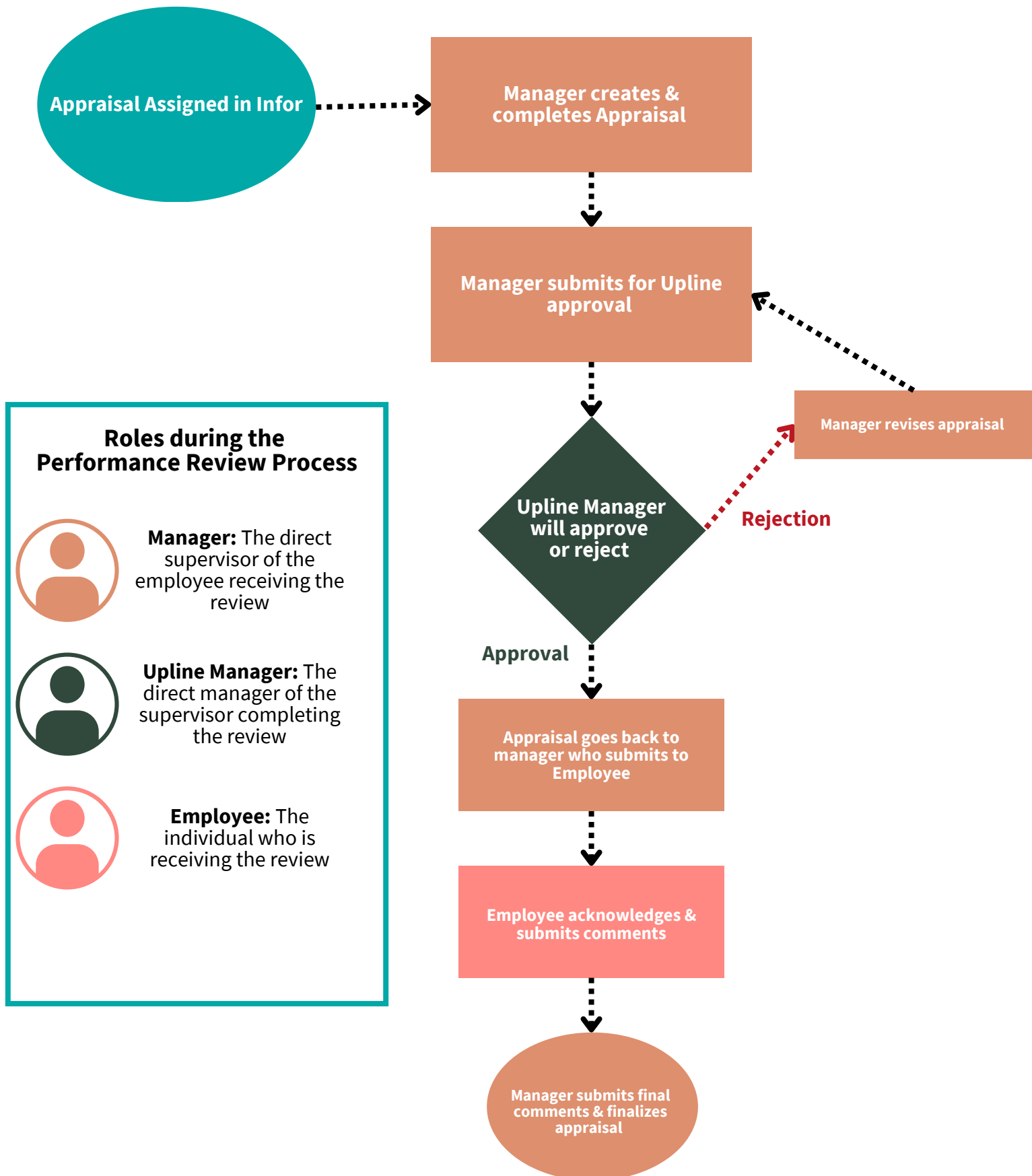
- ALL FULL-TIME & PART TIME **CIVILIAN** EMPLOYEES
- HIRED ON OR BEFORE **03/31/2025**
- FORM MUST BE COMPLETED BY **CURRENT**, IMMEDIATE SUPERVISOR

RATING SCALE

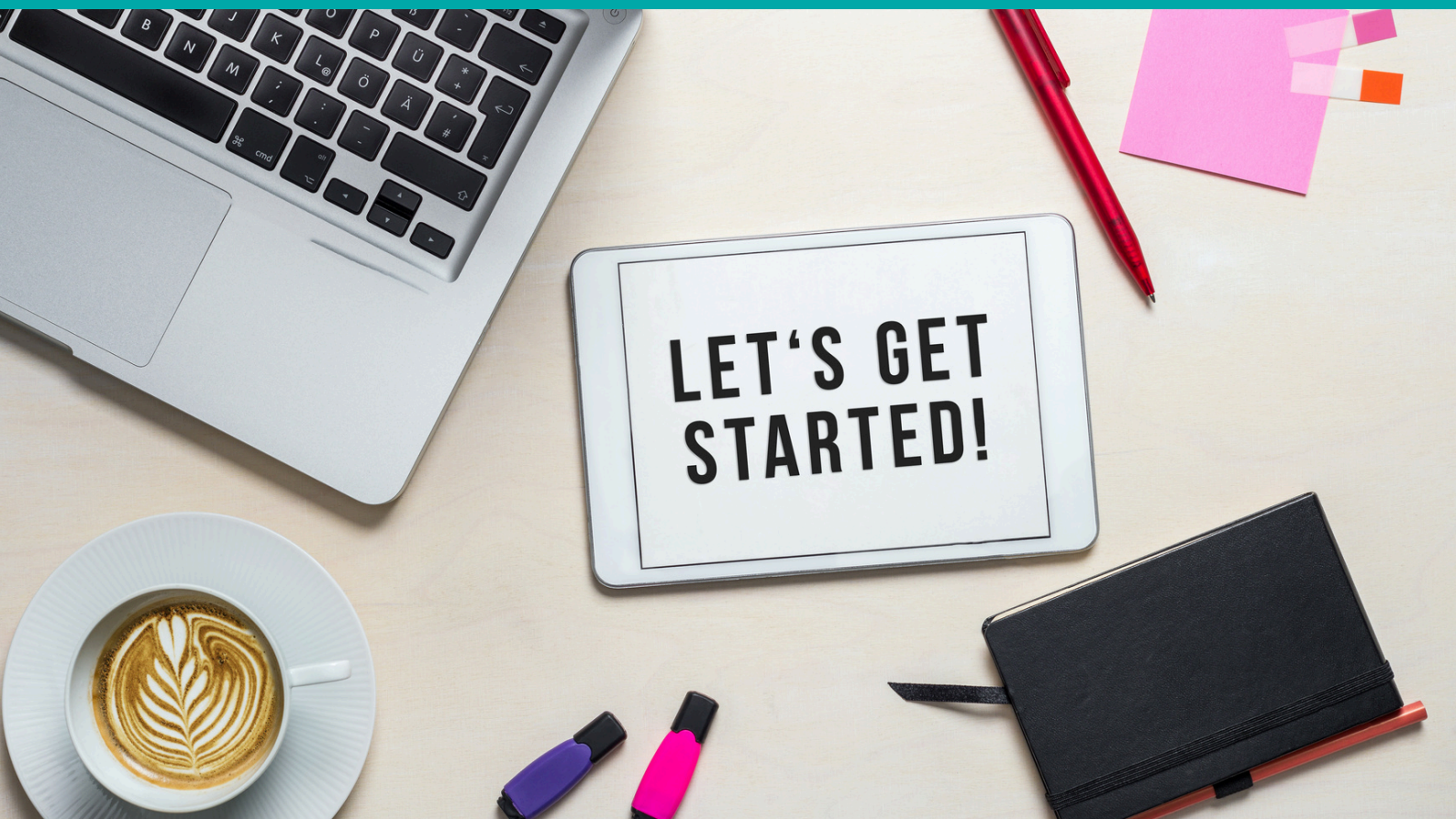


PIPS (PERFORMANCE IMPROVEMENT PLANS)

- 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.



USE THESE INSTRUCTIONS FOR NEW APPRAISALS



**IF YOU HAVEN'T ENTERED ANY
DATA IN, THIS SECTION IS FOR YOU**

FIRST STEP: LOGIN INTO INFOR

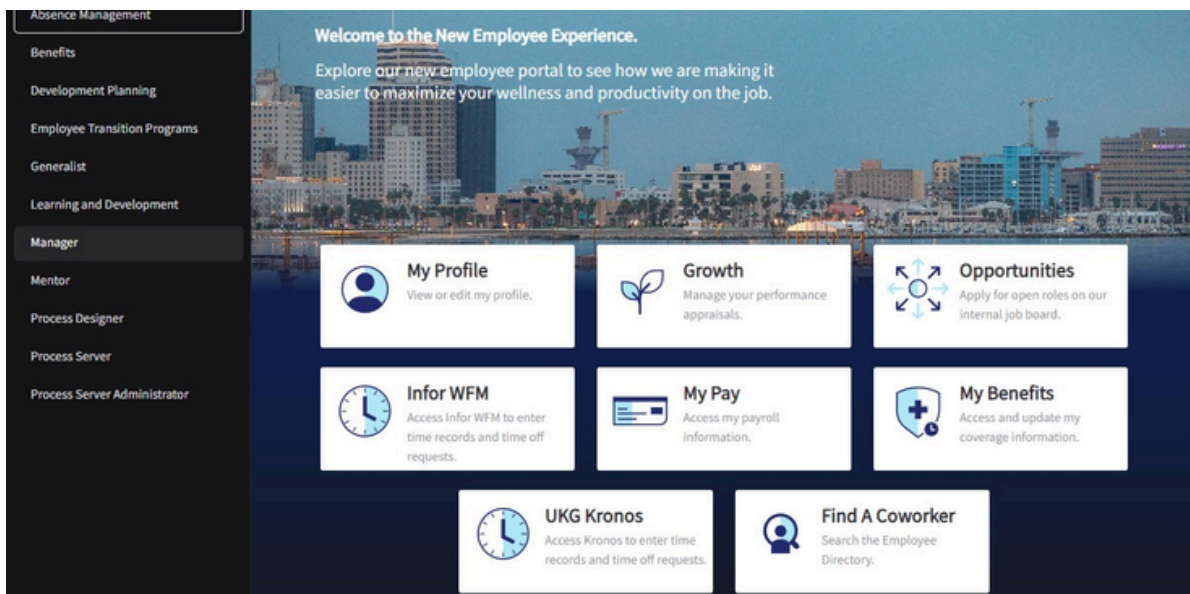


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

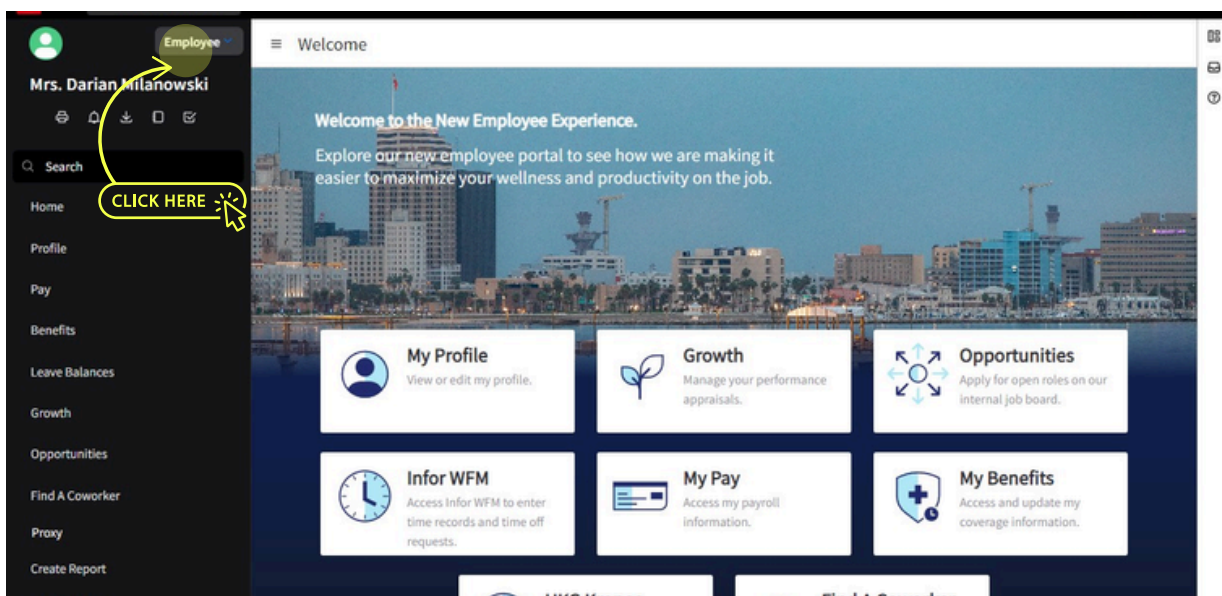


Diagram 2 : Left Hand Bar Dropdown



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

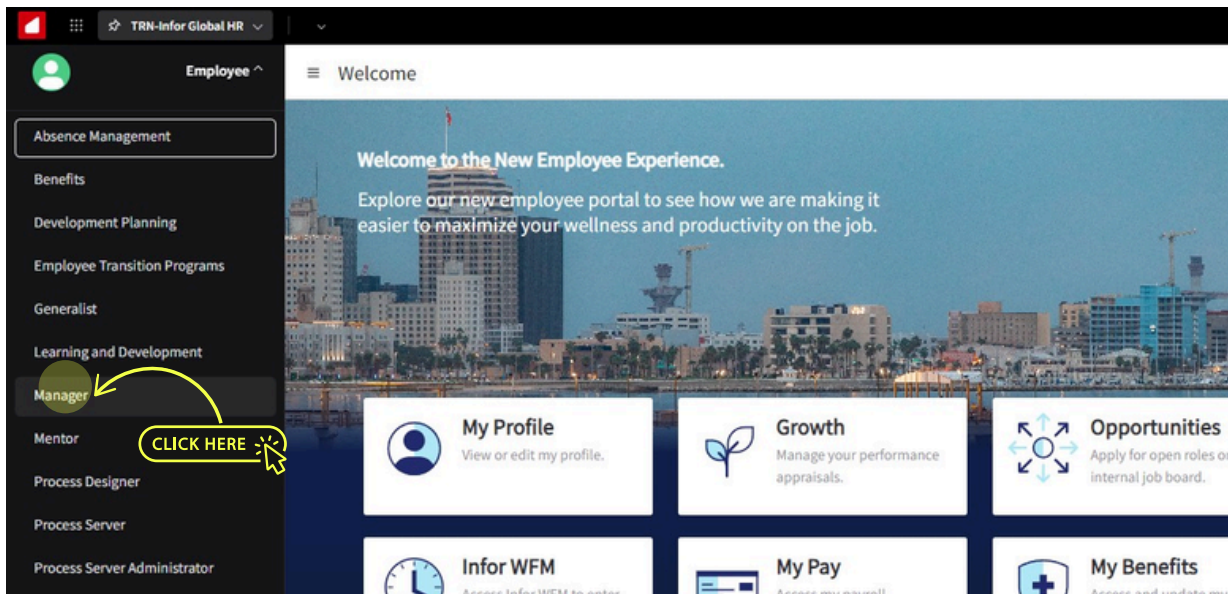


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “REVIEW PERFORMANCE”

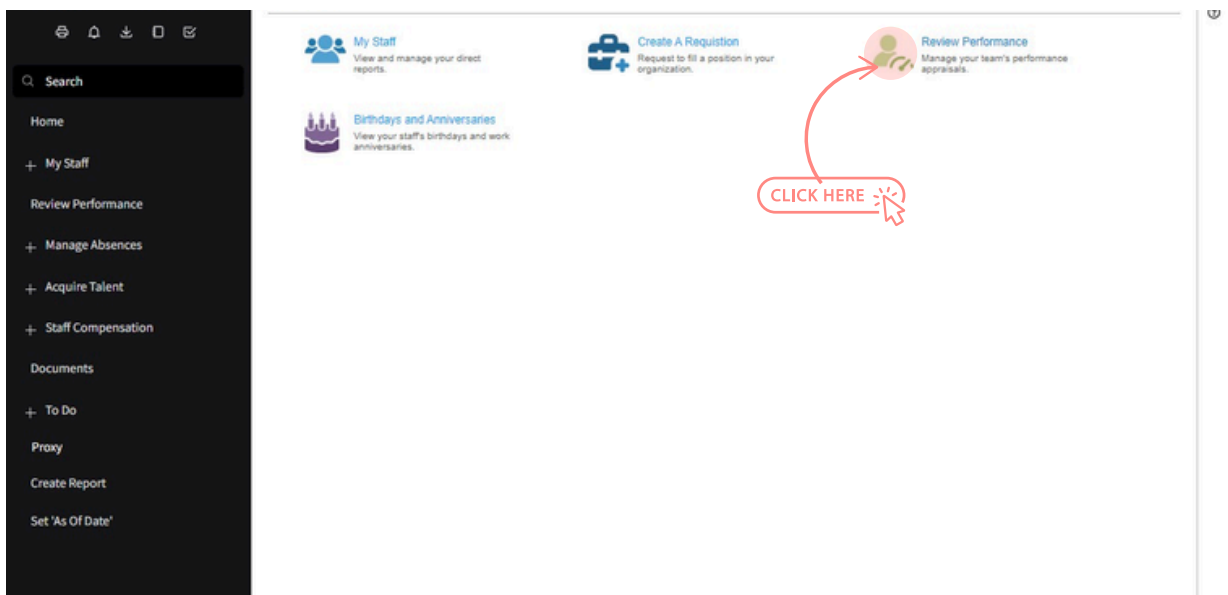


Diagram 4 : Manager Space



NO REVIEWS? CLICK REFRESH



SEE REVIEWS? SKIP TO NEXT STEP

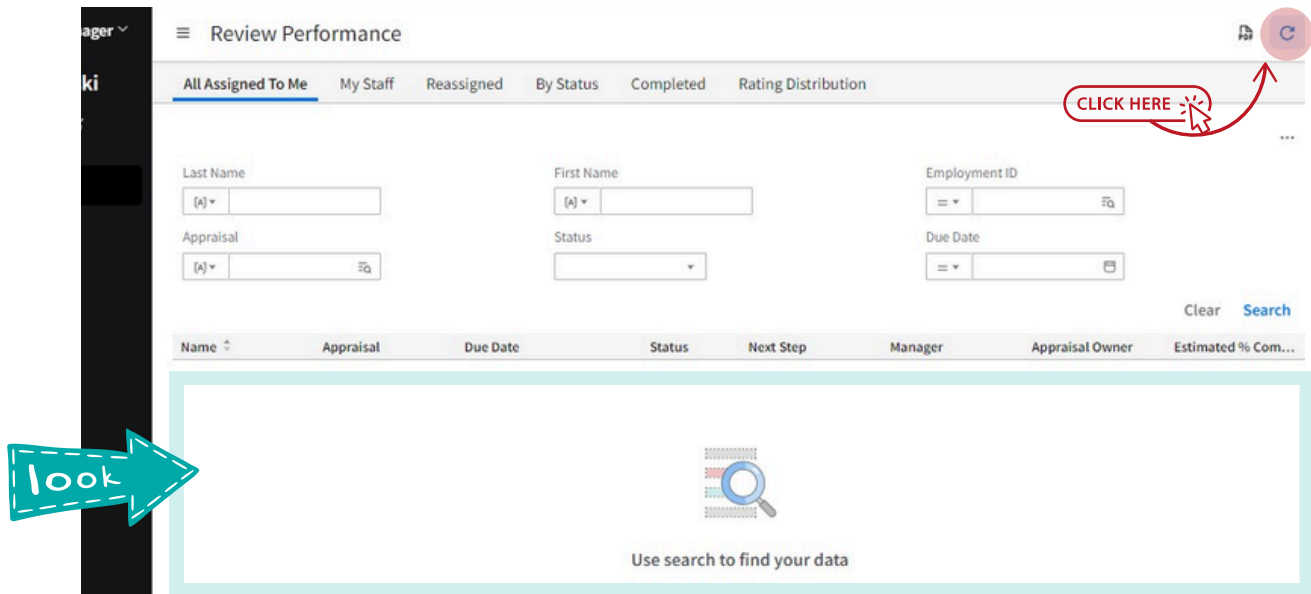


Diagram 5 : Performance Dashboard

DOUBLE-CLICK ON THE EMPLOYEE

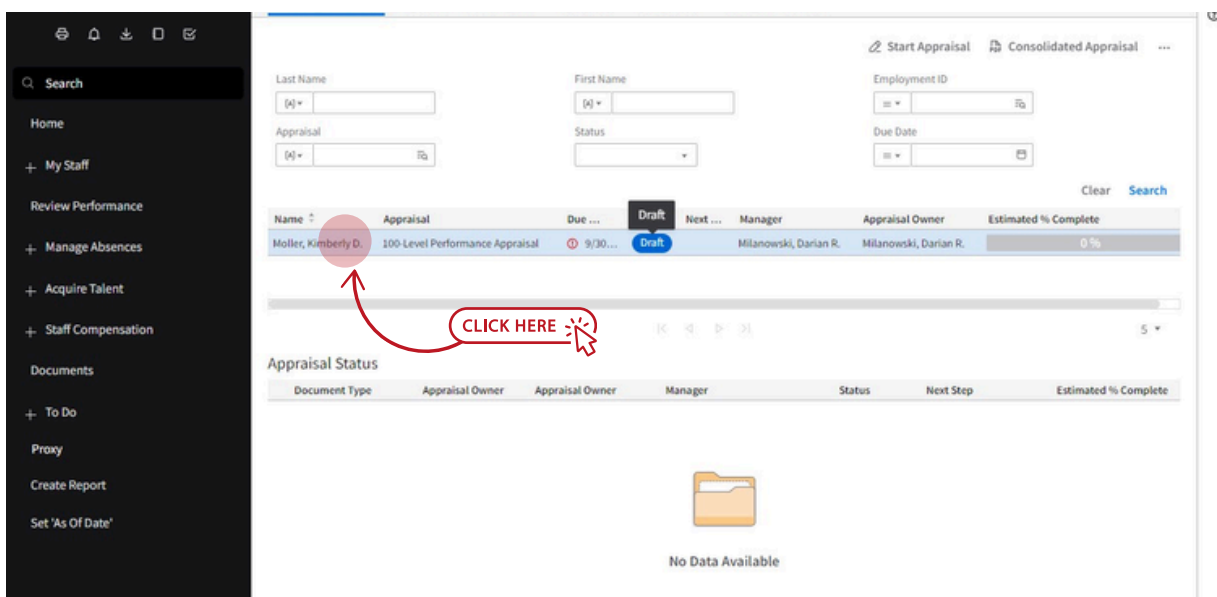


Diagram 6 : Performance Dashboard

CLICK "START APPRAISAL"

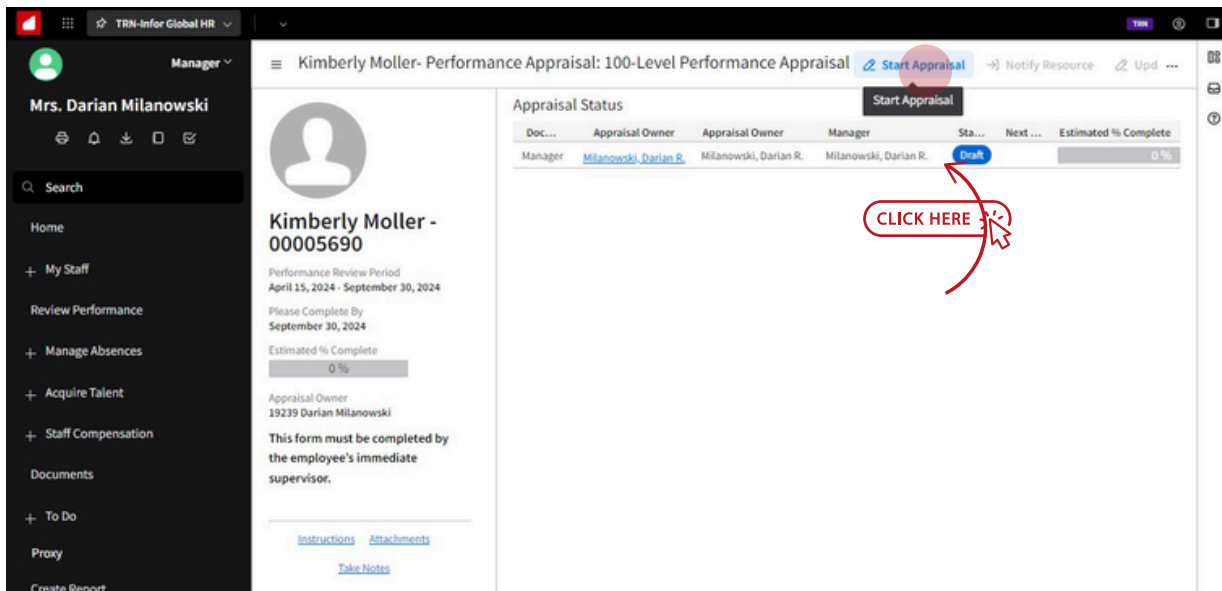


Diagram 7: Employee Performance Start Screen

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

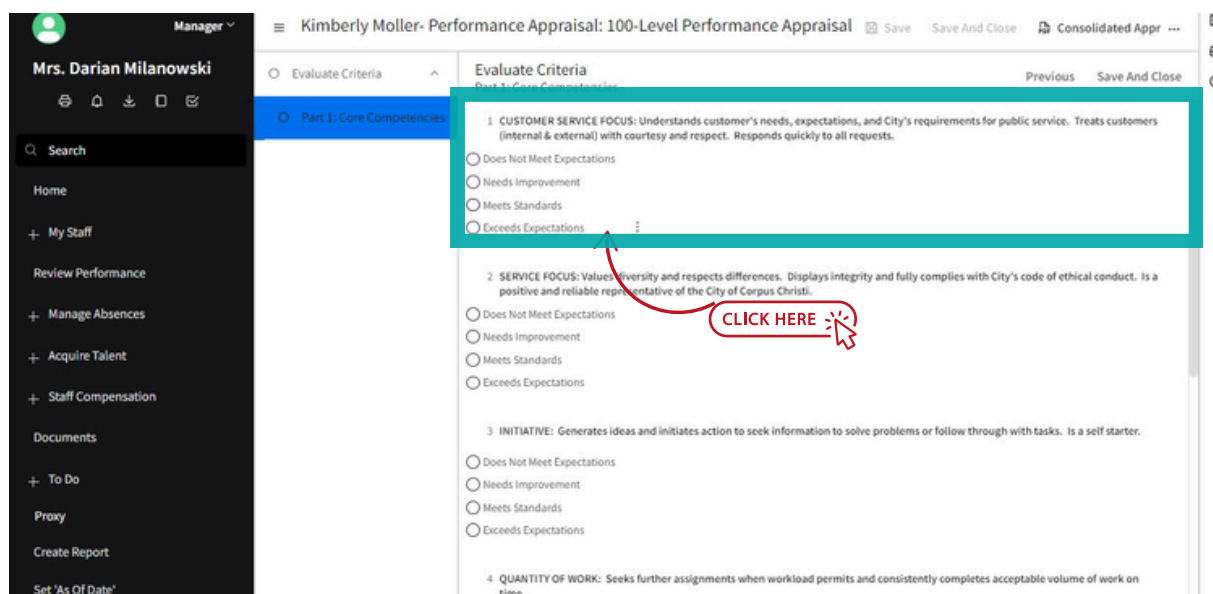


Diagram 8 : Performance Appraisals

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

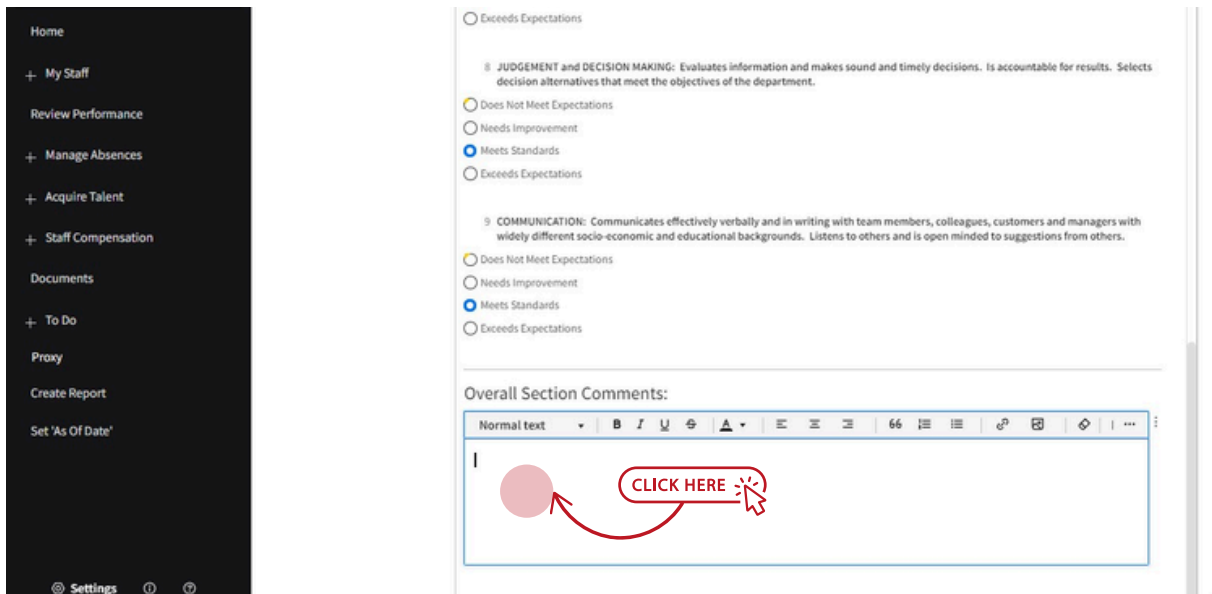


Diagram 9: Overall Section Comments

II ARE YOU REVIEWING A 100 EMPLOYEE? SKIP THIS STEP

GO RATING A 200 EMPLOYEE? CONTINUE

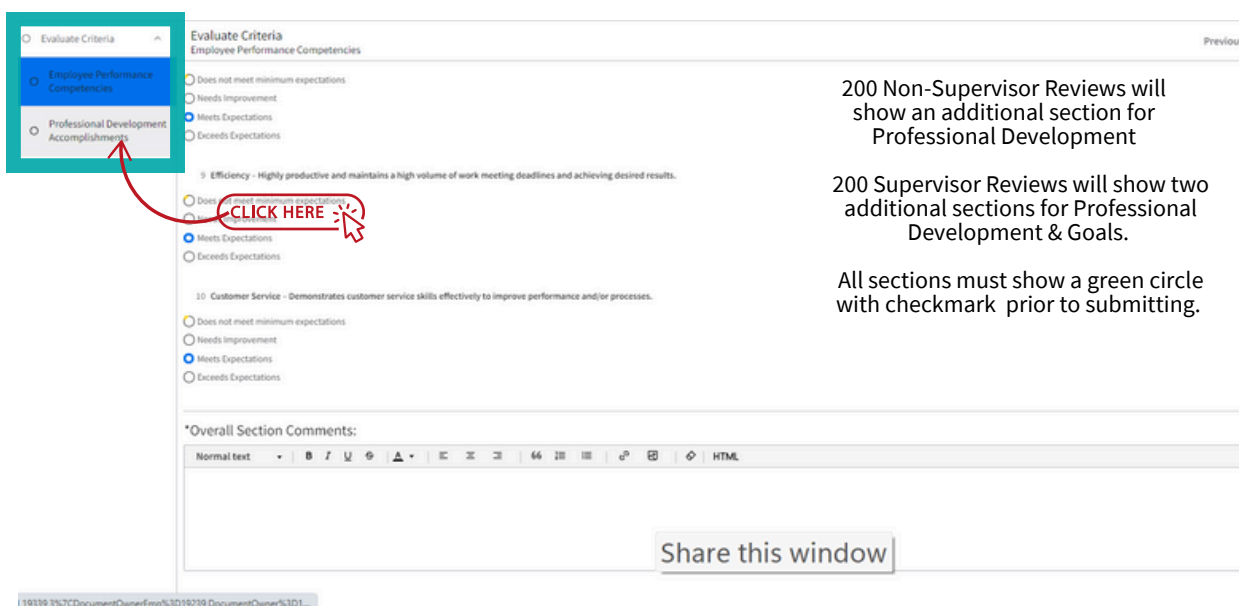
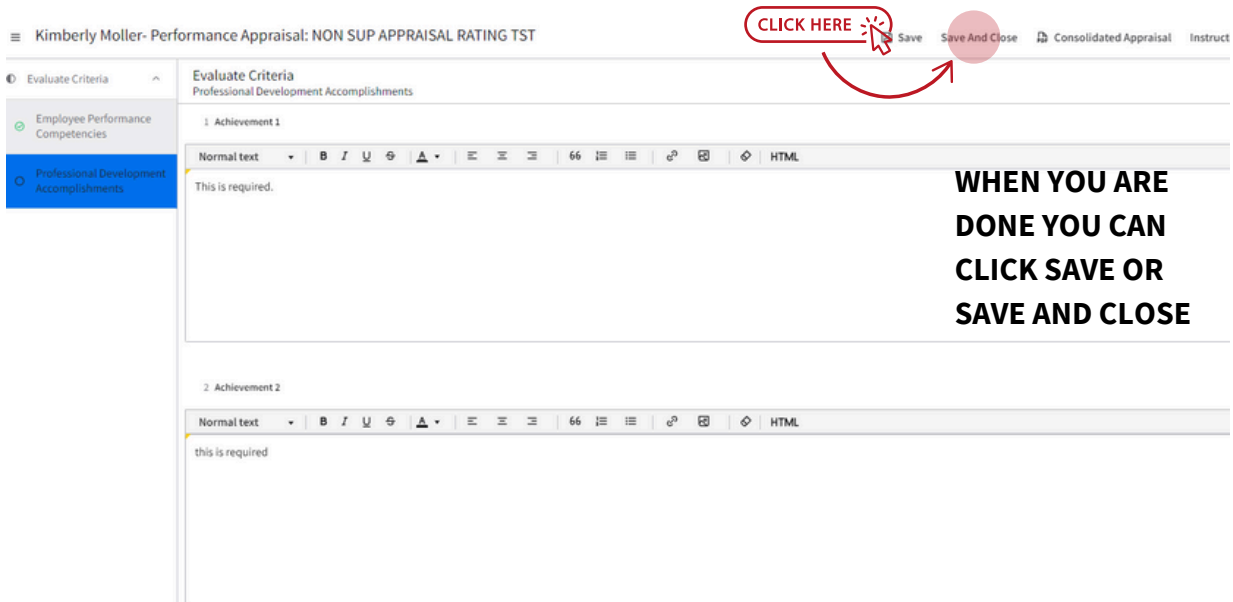


Diagram 10: Section Box

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

TO VIEW CALCULATED SCORE CLICK ON “CONSOLIDATED APPRAISAL”

If nothing loads, please disable pop-up blocker.

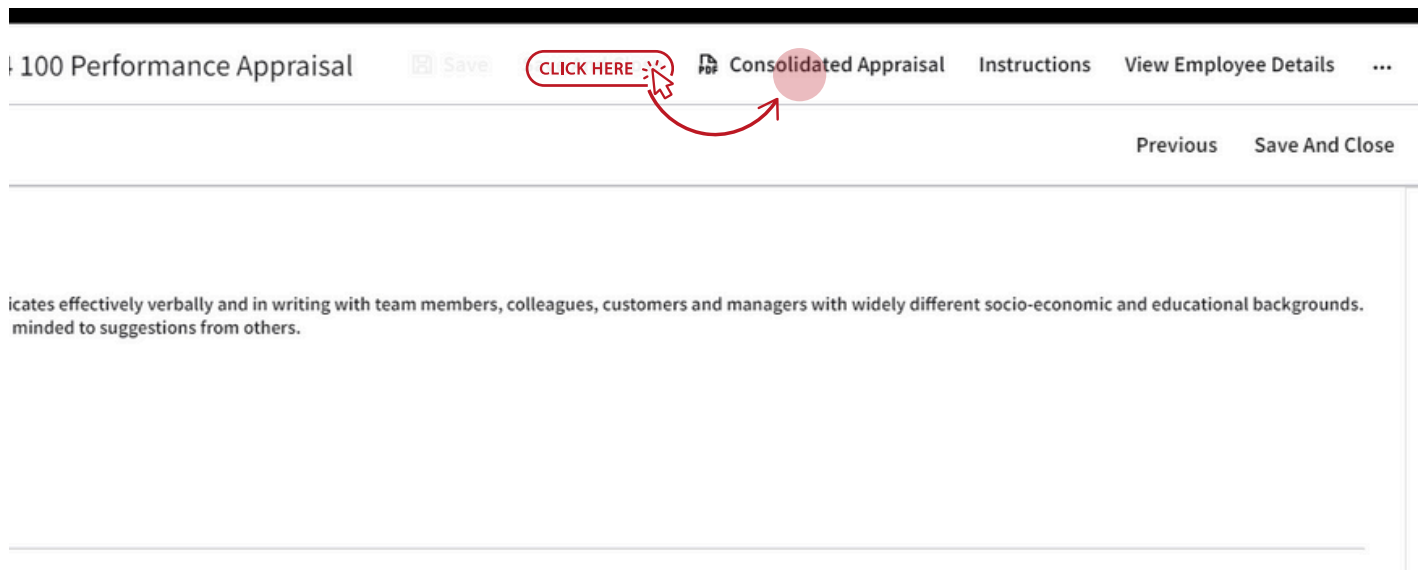


Diagram 12: Consolidated Appraisal Button

YOUR SCORE SHOULD AUTO-CALCULATE THE RAW SCORE & FINAL OVERALL RATING

IF THE OVERALL RATING SAYS “O -”, PLEASE CALL HR FOR ASSISTANCE.

The screenshot shows a web application interface for a performance appraisal. At the top, there's a header with a menu icon, the text 'FY24 100 Performance Appraisal for...', and navigation controls like '3 / 3', '- 100%', '+', and icons for save and share. Below the header, there's a dropdown menu currently set to 'Manager'. The main content area displays a 'Rating Summary: 4-Exceeds Expectations,3-Meets Standard,2-Needs Improvement,1-Does Not Meet Expectations'. Below this is a table titled 'Overall Calculated Scores'.

Section	Score	Weight
Part 1: Core Competencies	3.88	100.00

Below the table, a teal-bordered box contains the following information:

Overall Score: 3.88
Overall Rating: 4 - Fully Exceeds Expectations

Diagram 13: Viewing the Overall Rating

CLICK ON SUBMIT TO ENTER PRE-UPLINE APPROVAL STATUS

This will not submit to your upline manager, you can still edit if needed

The screenshot shows a submission interface. At the top, there are four buttons: 'Continue Appraisal' (with a pencil icon), 'Submit' (with a checkmark icon), 'Notify Resource' (with a right arrow icon), and 'Update Overall Rating' (with a refresh icon). The 'Submit' button is highlighted with a red circle, and a red arrow points from a 'CLICK HERE' callout box to it. Below the buttons is a table with three columns: 'Status', 'Next Step', and 'Estimated % Complete'.

Status	Next Step	Estimated % Complete
Marian R.	In Progress	<div style="width: 100%; height: 10px; background-color: green;"></div>

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.

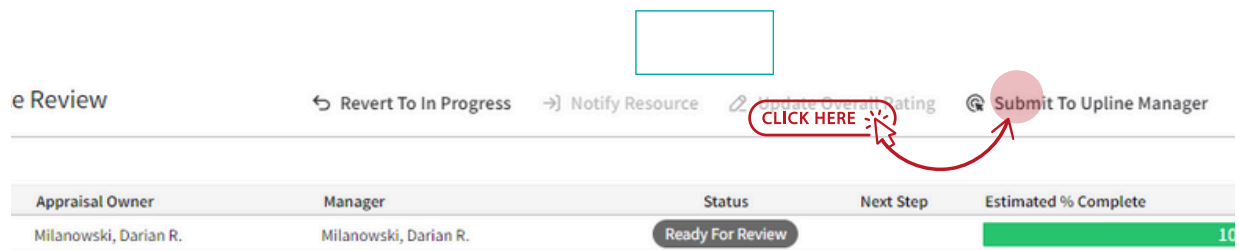
THE STATUS SHOULD CHANGE TO “READY FOR REVIEW”

Diagram 14: Submission Screen



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

CLICK SUBMIT TO UPLINE MANAGER



THE STATUS SHOULD CHANGE TO “READY FOR REVIEW”


Diagram 15: Upline Manager

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

Status	Next Step	Es
Pending Acknowledgment		

Diagram 16: Upline Approval Success

USE THESE INSTRUCTIONS FOR DRAFT APPRAISALS



TO BE CONTINUED...

**IF YOU ALREADY ENTERED IN DATA AND
SAVED, THIS SECTION IS FOR YOU**

NAVIGATE TO MANAGER -> REVIEW PERFORMANCE -> MY STAFF

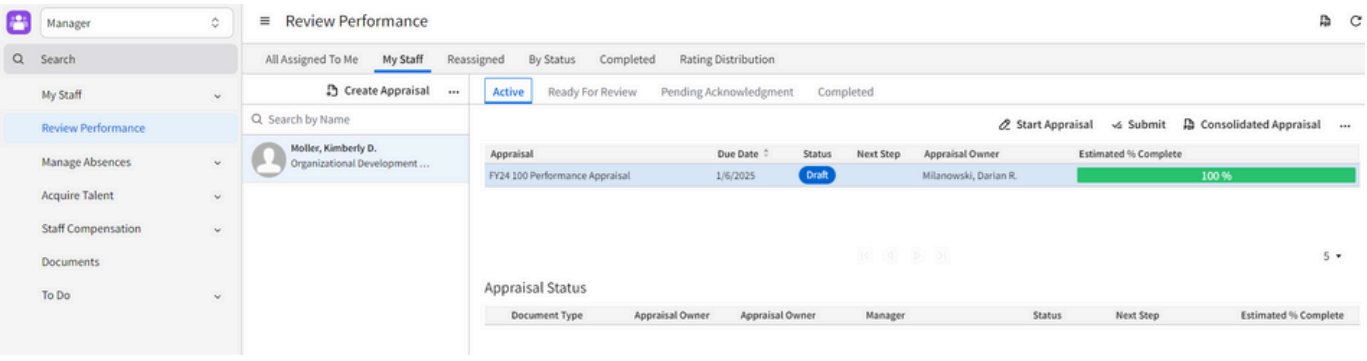


Diagram 1 : My Staff Tab

SELECT THE EMPLOYEE AND CLICK ON START APPRAISAL

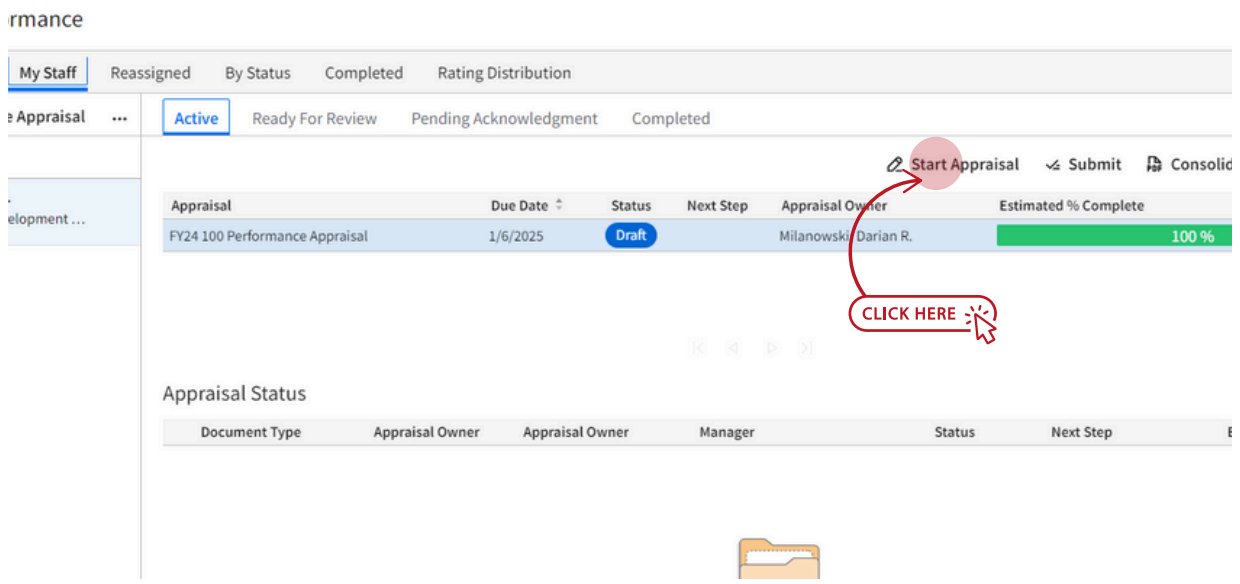
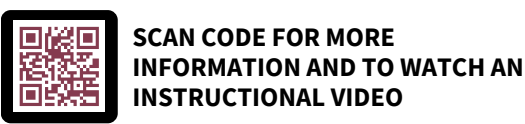


Diagram 2 : Employee Appraisal Launch Page



SUBMITTING DRAFT APPRAISALS

Use for
Appraisals in
“DRAFT”

**VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK
“SAVE AND CLOSE”**

Kimberly Moller- Performance Appraisal: FY24 100 Performance Appraisal

Save Save And Close Consolidated Appraisal Instructions View Employee Details ...

Evaluate Criteria

Part 1: Core Competencies

1 CUSTOMER SERVICE FOCUS: Understands customer's needs, expectations, and City's requirements for public service. Treats customers (internal & external) with courtesy and respect. Responds quickly to all requests.

☐ Needs significant improvement

☐ Needs improvement

☒ Meets Standards

☐ Fully Exceeds Expectations

2 SERVICE FOCUS: Values diversity and respects differences. Displays integrity and fully complies with City's code of ethical conduct. Is a positive and reliable representative of the City of Corpus Christi.

☐ Needs significant improvement

☐ Needs improvement

☐ Meets Standards

☒ Fully Exceeds Expectations

3 INITIATIVE: Generates ideas and initiates action to seek information to solve problems or follow through with tasks. Is a self starter.

☐ Needs significant improvement

☐ Needs improvement

Previous Save And Close

CLICK HERE

Diagram 3 : Employee Appraisal Screen

**CLICK ON SUBMIT AND THEN ENTER IN
TODAY'S TODAY.**

Assigned To Me My Staff Reassigned By Status Completed Rating Distribution

Create Appraisal ... Active Ready For Review Pending Acknowledgment Completed

Search by Name

Moller, Kimberly D. Organizational Development

Submit Appraisal

By submitting this appraisal, the appraisal can be submitted to the upline manager for approval. Click Submit to confirm.

Meeting Date

Cancel Submit

Start Appraisal Submit Consolidated Appraisal ...

Estimated % Complete

100 %

CLICK HERE

Diagram 4 : Submit Appraisal Process



SUBMITTING DRAFT APPRAISALS

Use for
Appraisals in
“DRAFT”

**VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK
“SAVE AND CLOSE”**

The screenshot shows the 'Evaluate Criteria' section for 'Kimberly Moller- Performance Appraisal: FY24 100 Performance Appraisal'. The left sidebar has 'Part 1: Core Competencies' selected. The main area lists three criteria with radio button options:

- 1 CUSTOMER SERVICE FOCUS:** Understands customer's needs, expectations, and City's requirements for public service. Treats customers (internal & external) with courtesy and respect. Responds quickly to all requests.
 - ☐ Needs significant improvement
 - ☐ Needs improvement
 - ☒ Meets Standards
 - ☐ Fully Exceeds Expectations
- 2 SERVICE FOCUS:** Values diversity and respects differences. Displays integrity and fully complies with City's code of ethical conduct. Is a positive and reliable representative of the City of Corpus Christi.
 - ☐ Needs significant improvement
 - ☐ Needs improvement
 - ☐ Meets Standards
 - ☒ Fully Exceeds Expectations
- 3 INITIATIVE:** Generates ideas and initiates action to seek information to solve problems or follow through with tasks. Is a self starter.
 - ☐ Needs significant improvement
 - ☐ Needs improvement

At the top right, there are buttons for 'Previous' and 'Save And Close'. A red circle highlights the 'Save And Close' button, with a red arrow pointing to it from a callout box that says 'CLICK HERE'.

Diagram 5 : Employee Appraisal Screen

**CLICK ON SUBMIT AND THEN ENTER IN
TODAY'S TODAY.**

The screenshot shows the 'Submit Appraisal' modal dialog. The dialog has a title bar 'Submit Appraisal' and a message: 'By submitting this appraisal, the appraisal can be submitted to the upline manager for approval. Click Submit to confirm.' Below the message is a 'Meeting Date' field with a calendar icon. At the bottom are 'Cancel' and 'Submit' buttons. In the background, the 'Submit' button on the main interface is highlighted with a red circle and a red arrow pointing to it from a callout box that says 'CLICK HERE'.

Diagram 6 : Submit Appraisal Process



SCAN CODE FOR MORE
INFORMATION AND TO WATCH AN
INSTRUCTIONAL VIDEO



SUBMITTING DRAFT APPRAISALS

Use for
Appraisals in
“DRAFT”

**CLICK ON “READY TO REVIEW” AND THEN CLICK ON
“SUBMIT TO UPLINE MANAGER” BUTTON.**

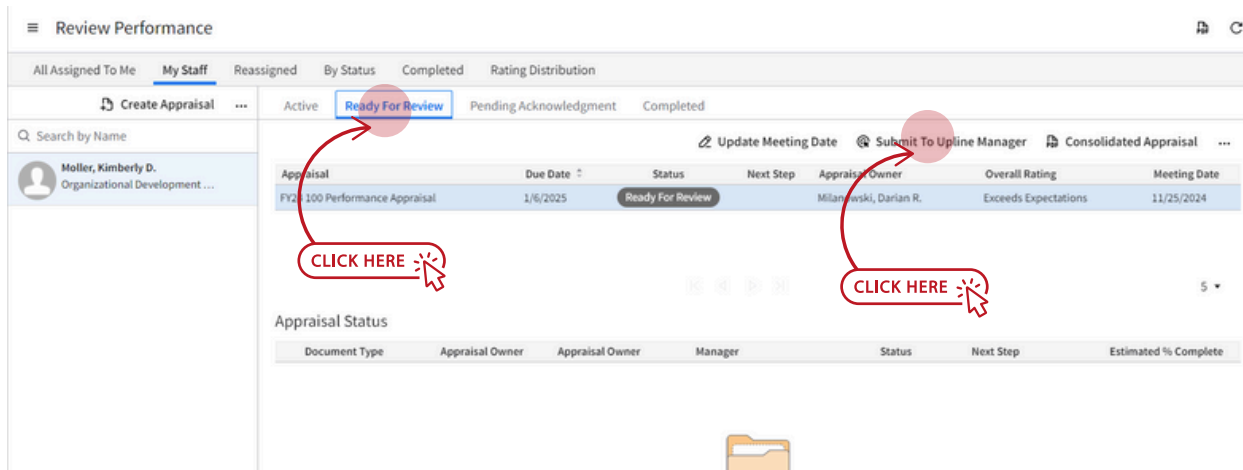


Diagram 7 : Ready for Review Tab

**PLEASE NOTIFY YOUR MANAGER YOU HAVE
SUBMITTED FOR UPLINE APPROVAL.**

THEY WILL NOT BE NOTIFIED VIA EMAIL.



USE THESE INSTRUCTIONS FOR UPLINE APPROVAL



**DO YOU MANAGE THE MANAGERS?
WELCOME TO UPLINE APPROVALS.**

FIRST STEP: LOGIN INTO INFOR

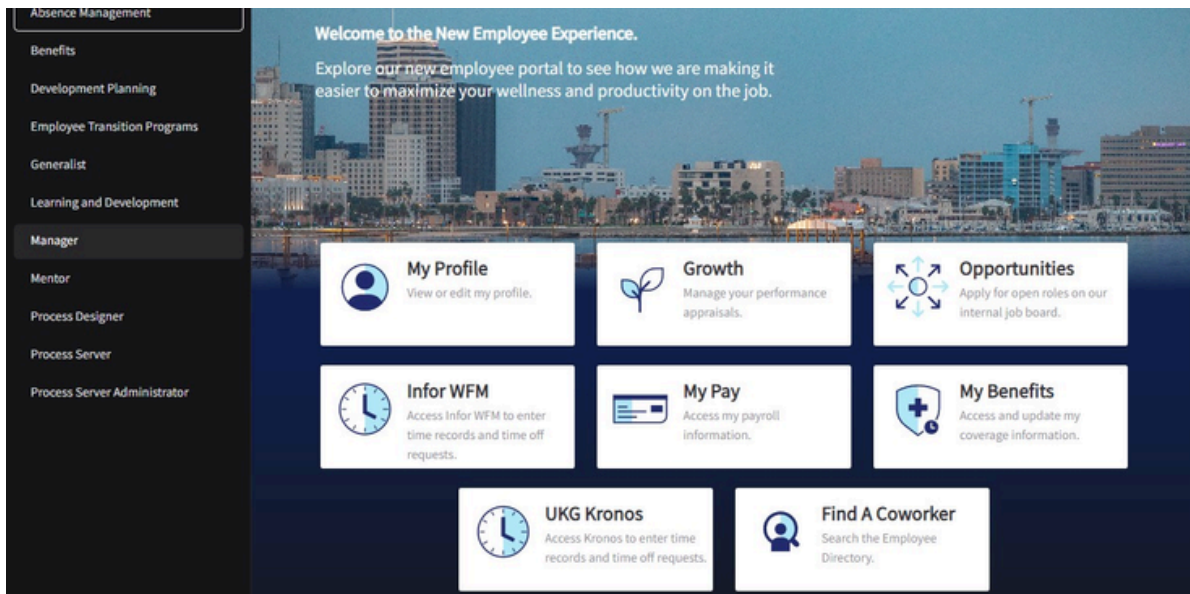


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

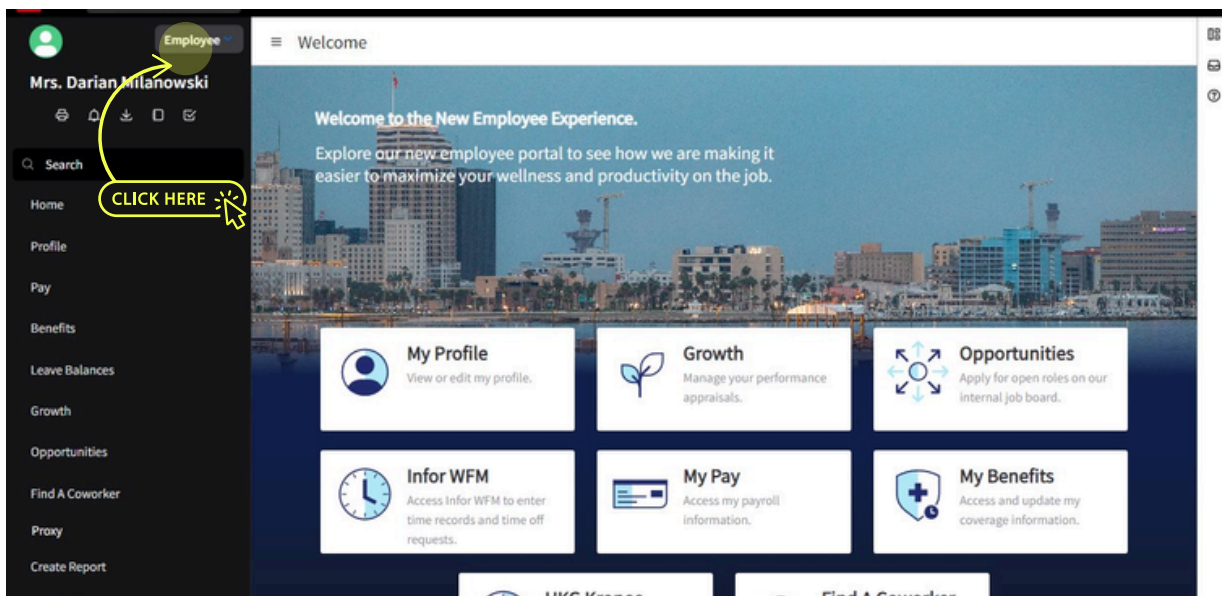


Diagram 2 : Left Hand Bar Dropdown



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

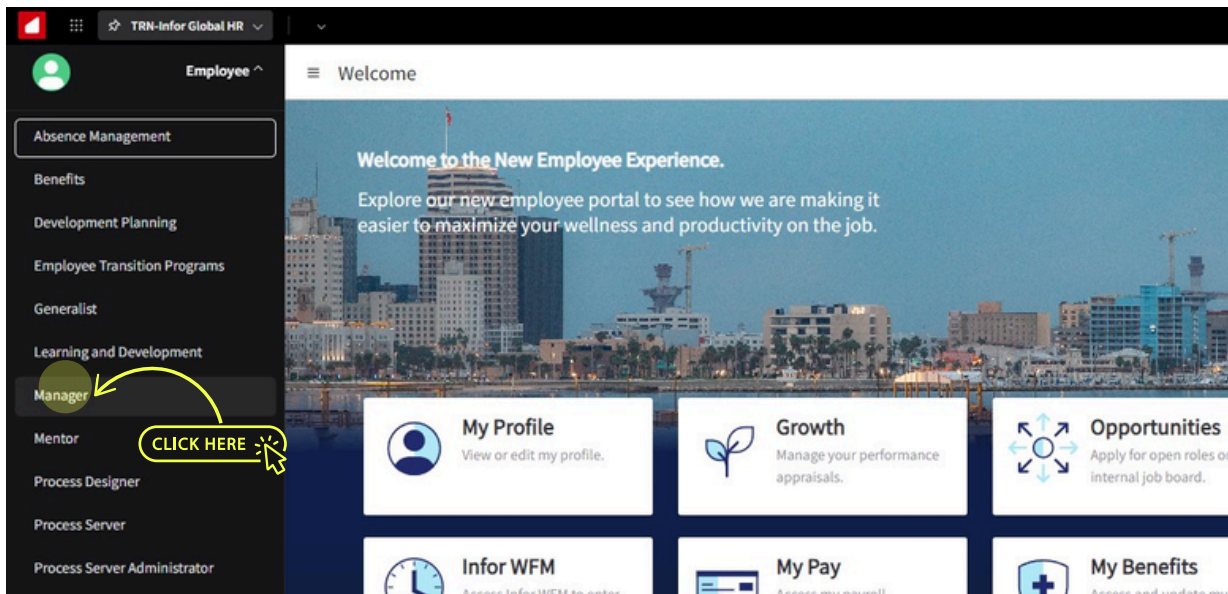


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “NOTIFICATIONS”

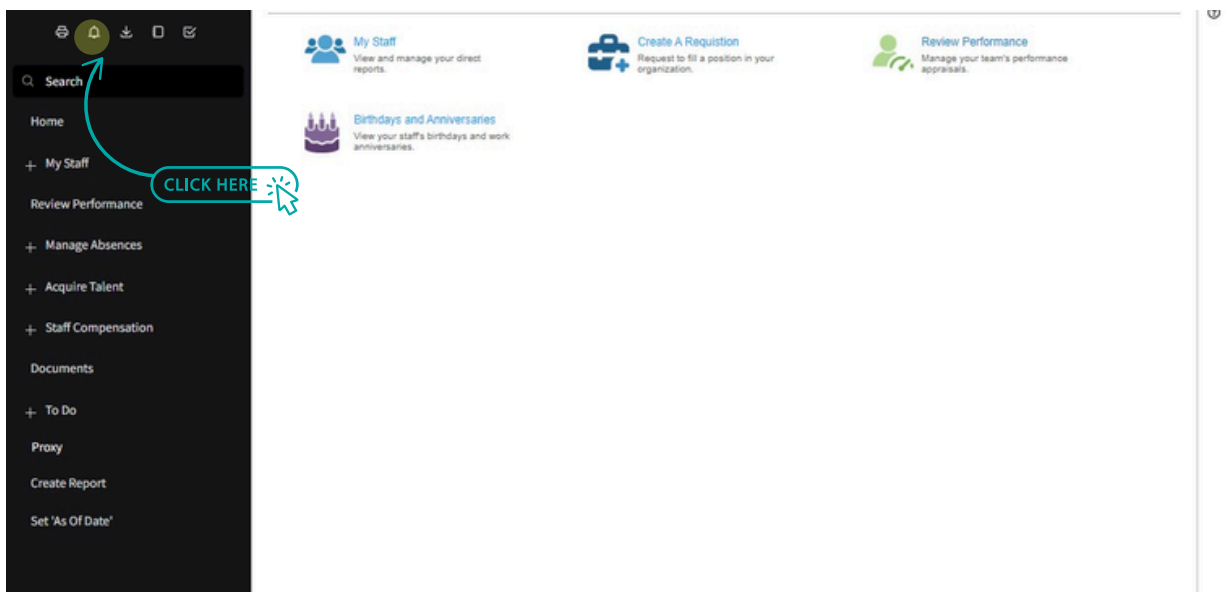


Diagram 4 : Manager Space

ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

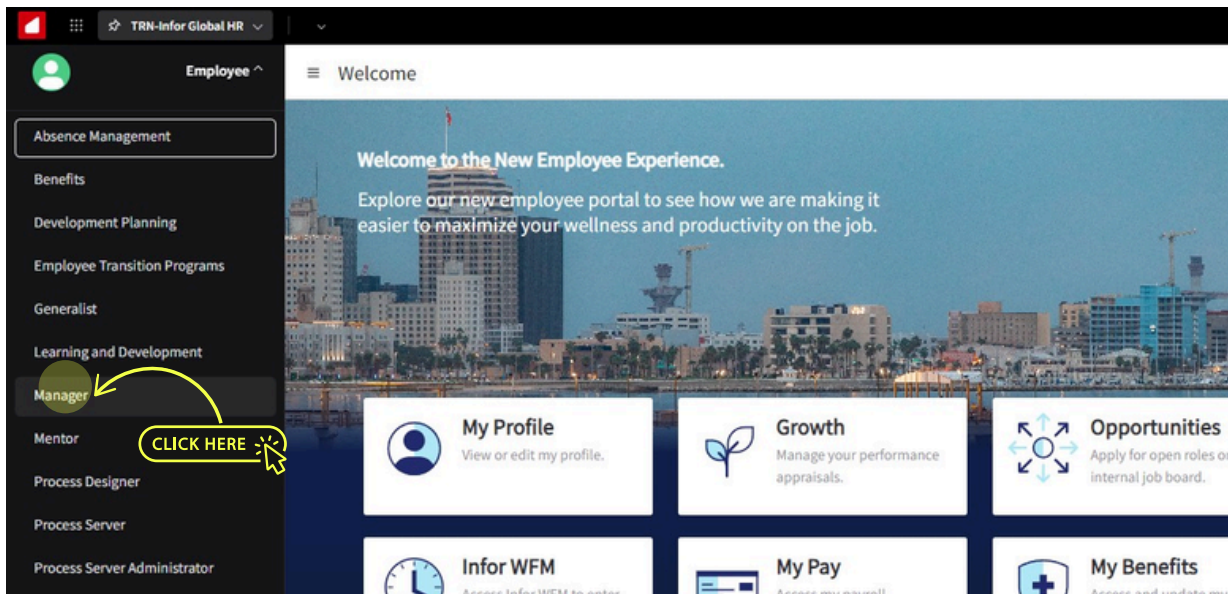


Diagram 5 : Left-Bar Dropdown Menu

CLICK ON “NOTIFICATIONS”

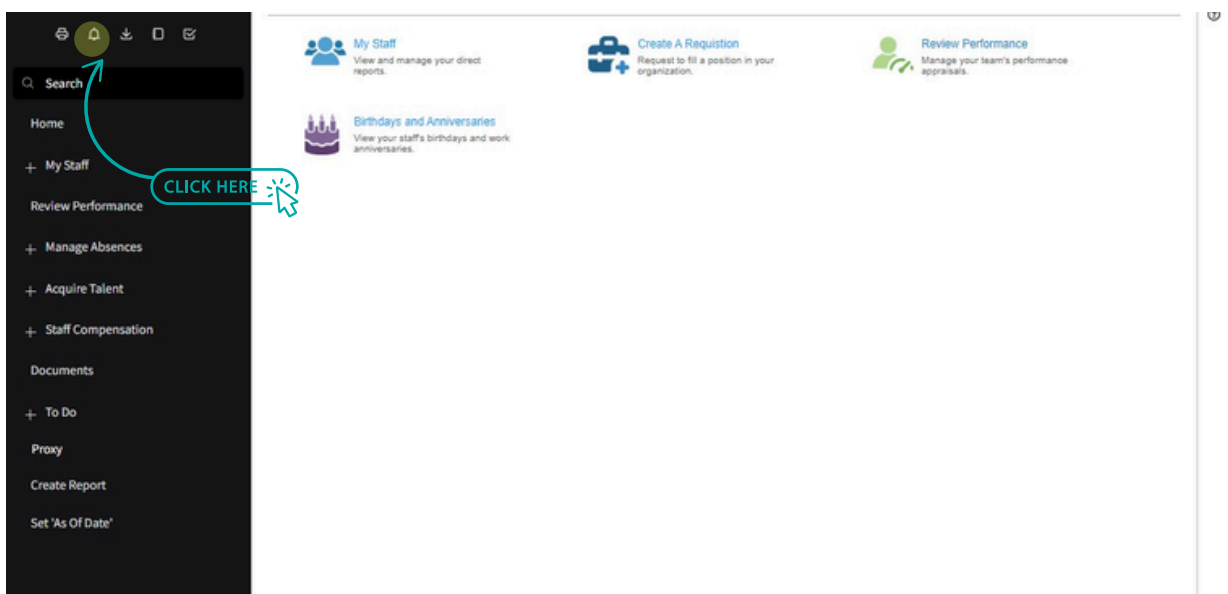


Diagram 6 : Manager Space

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.

ALL APPRAISALS - FINAL STEPS



**FINAL STEPS FOR BOTH NEW &
CONTINUING APPRAISALS**

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

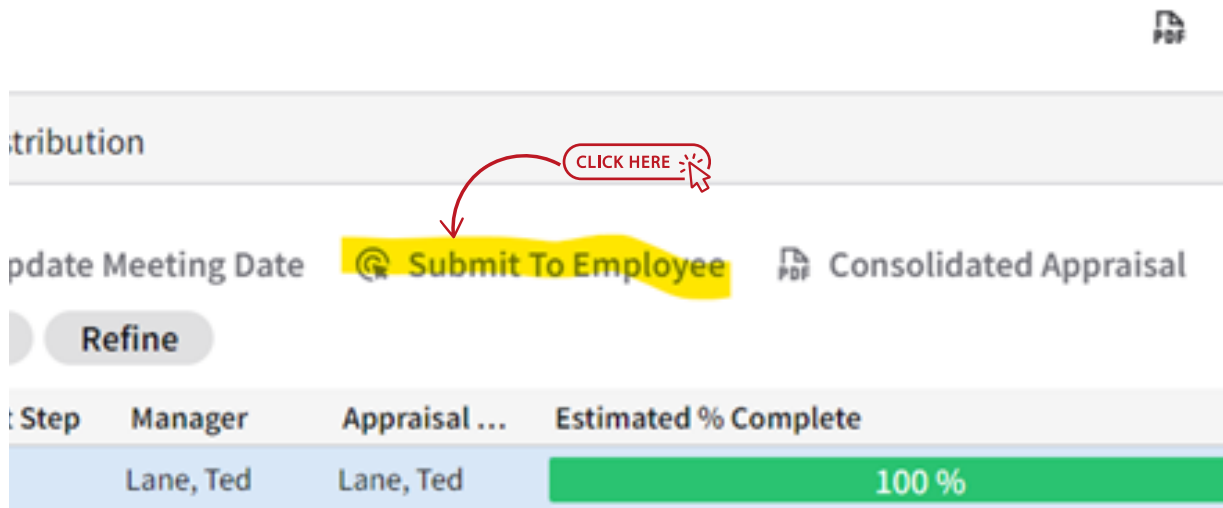
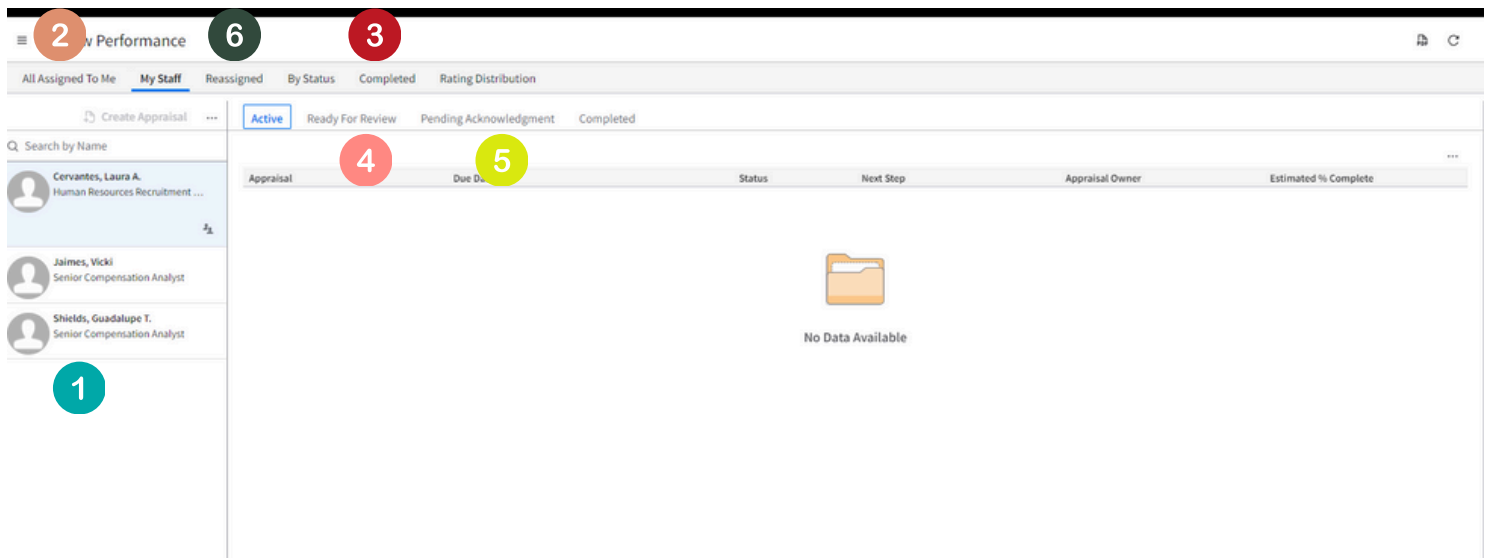


Diagram 1 : Submit to Employee

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

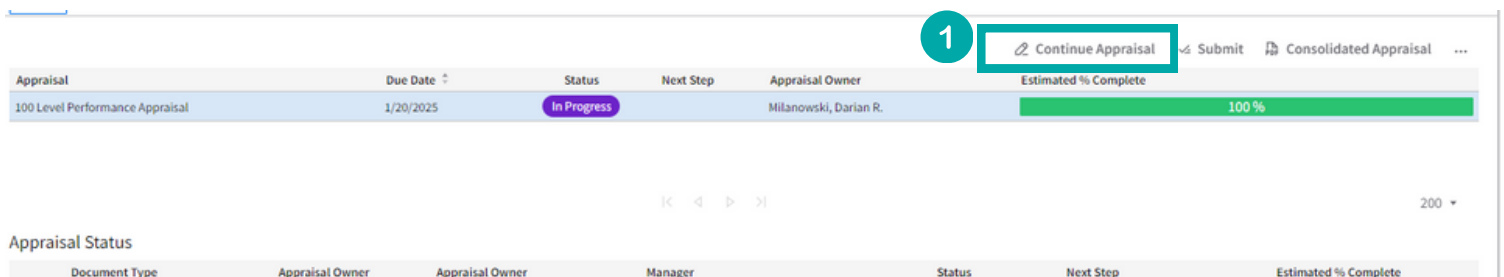
4 View all Appraisals Ready for Review

2 View all Appraisals Assigned to You

5 View All Appraisals Pending Acknowledgment

3 View all Completed Appraisals Assigned to You

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.