



MANAGER GUIDE

INFOR PERFORMANCE APPRAISALS

Step-by-Step Guide



FY 2025

 learningcc.org

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TABLE OF CONTENTS

SECTION 1

PERFORMANCE APPRAISAL PROCESS OVERVIEW

Looking for timelines, information on our rating scale, or eligibility? Start here.

SECTION 2

WORKFLOW

Check out this section for a flow chart and definitions of commonly held roles during the performance appraisal process.

SECTION 3

NEW APPRAISAL NAVIGATION GUIDE

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

SECTION 4

CONTINUING APPRAISAL NAVIGATION GUIDE

Did you create draft appraisals during October? Start here to continue the steps.

SECTION 5

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.

SECTION 6

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 its final form? View the appendix.



OVERVIEW OF PERFORMANCE APPRAISALS

TIMELINE & KEY DATES

OCTOBER 13TH - OCTOBER 17TH

200 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 17th**. Please speak with your supervisor if you need additional time to complete.

OCTOBER 14TH

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

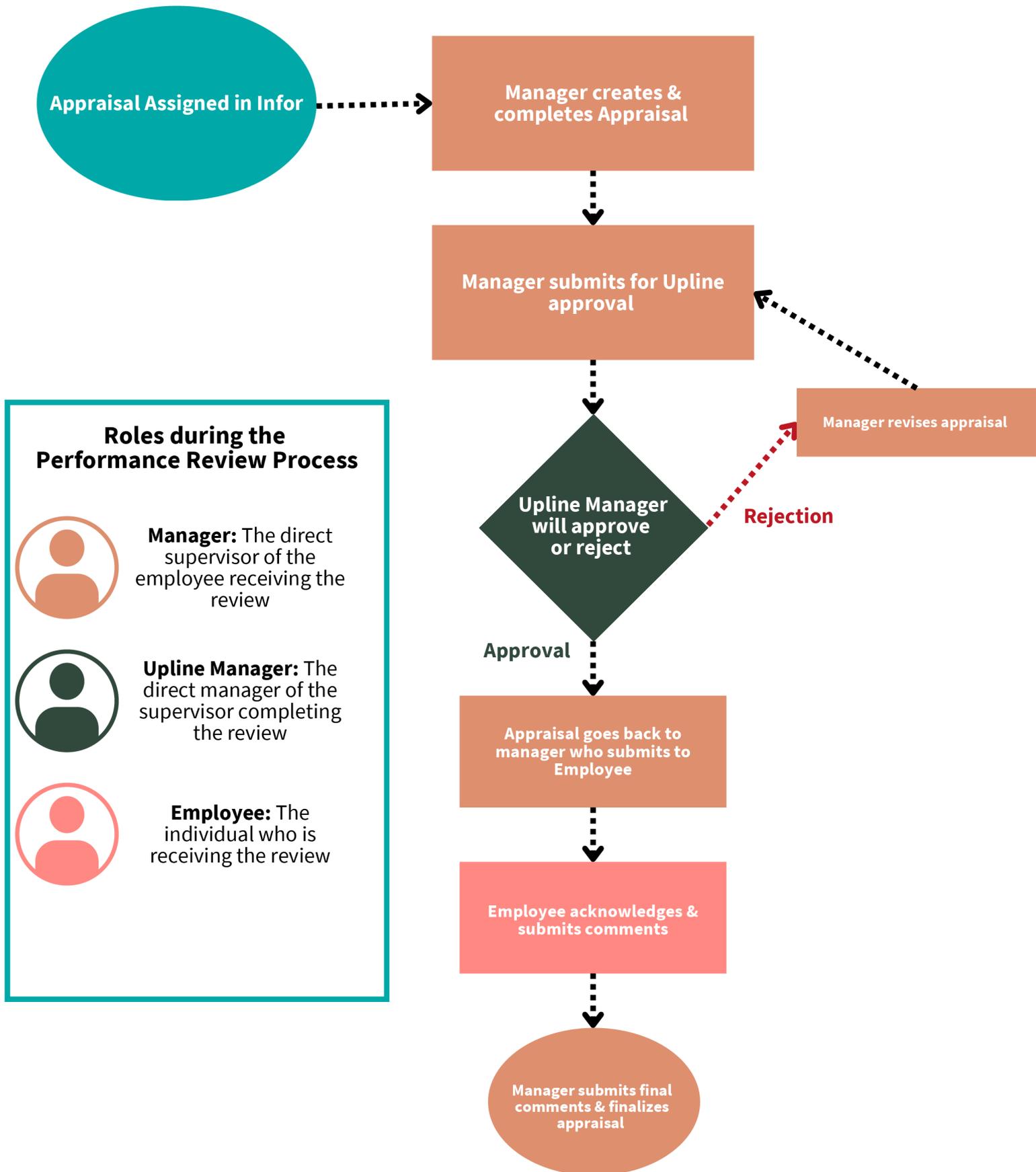
- ALL FULL-TIME & PART TIME **CIVILIAN** EMPLOYEES
- HIRED ON OR BEFORE **03/31/2025**
- FORM MUST BE COMPLETED BY **CURRENT**, IMMEDIATE SUPERVISOR

RATING SCALE

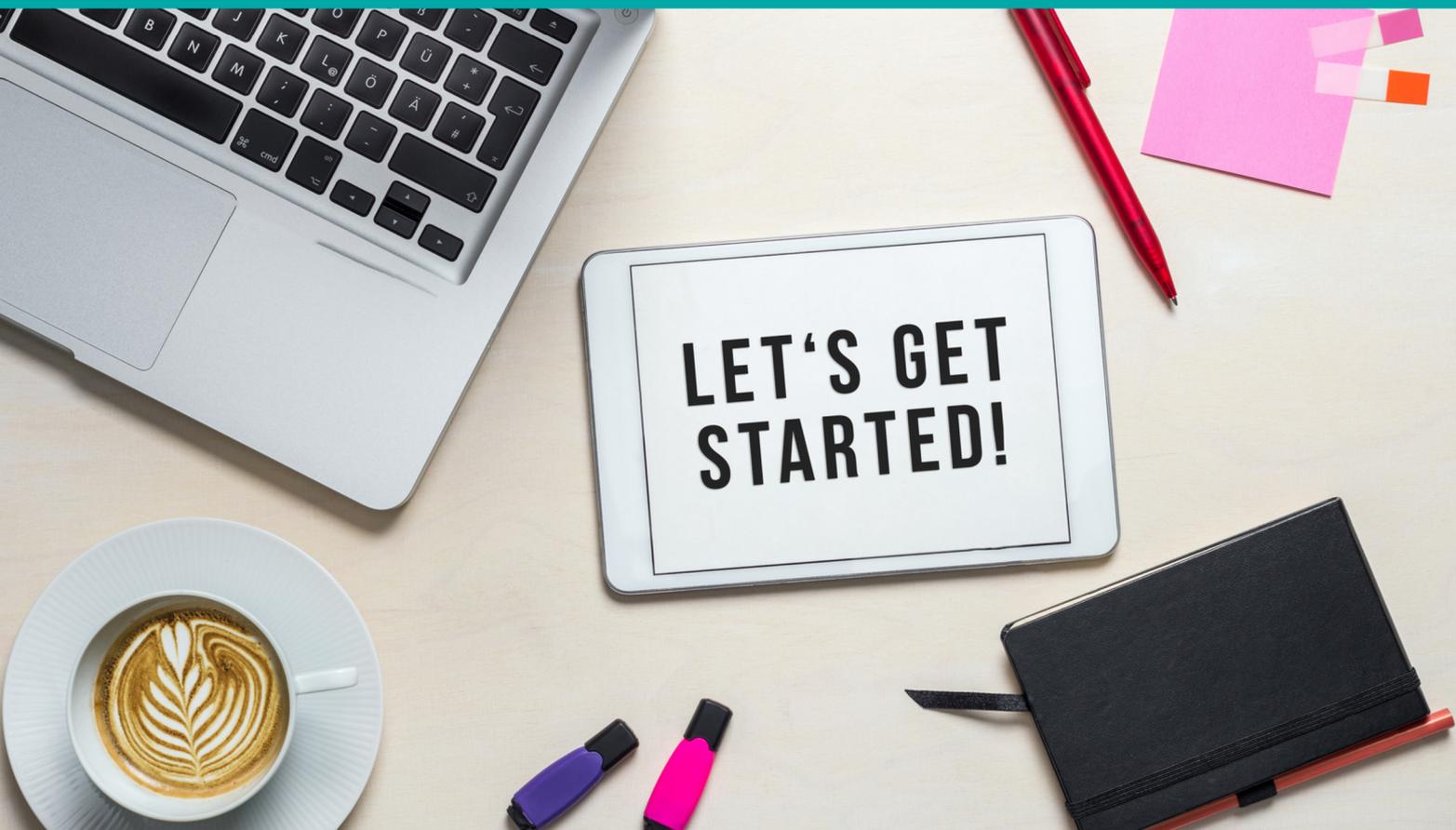


PIPS (PERFORMANCE IMPROVEMENT PLANS)

- 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.
- **TALENT ACQUISITION - WORKFORCE 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

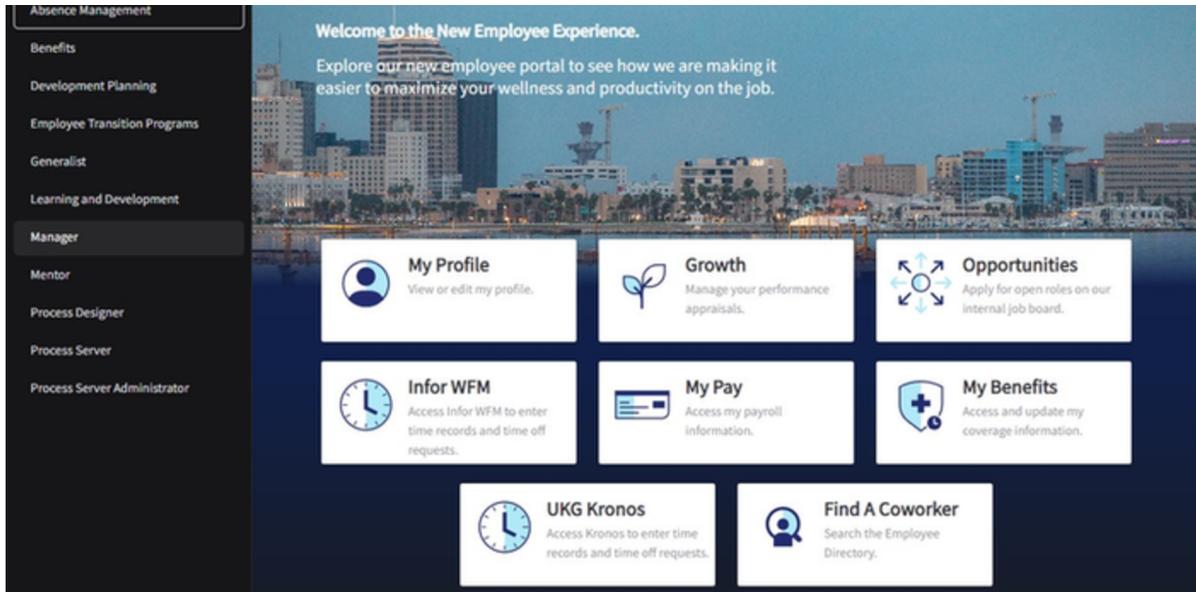


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

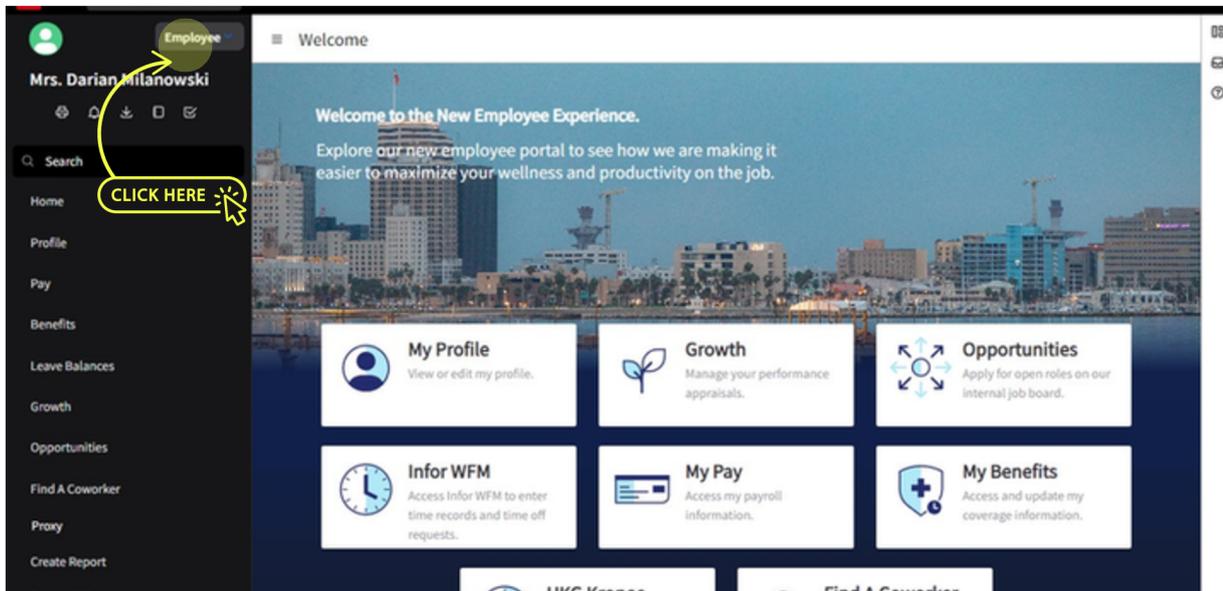


Diagram 2 : Left Hand Bar Dropdown



SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

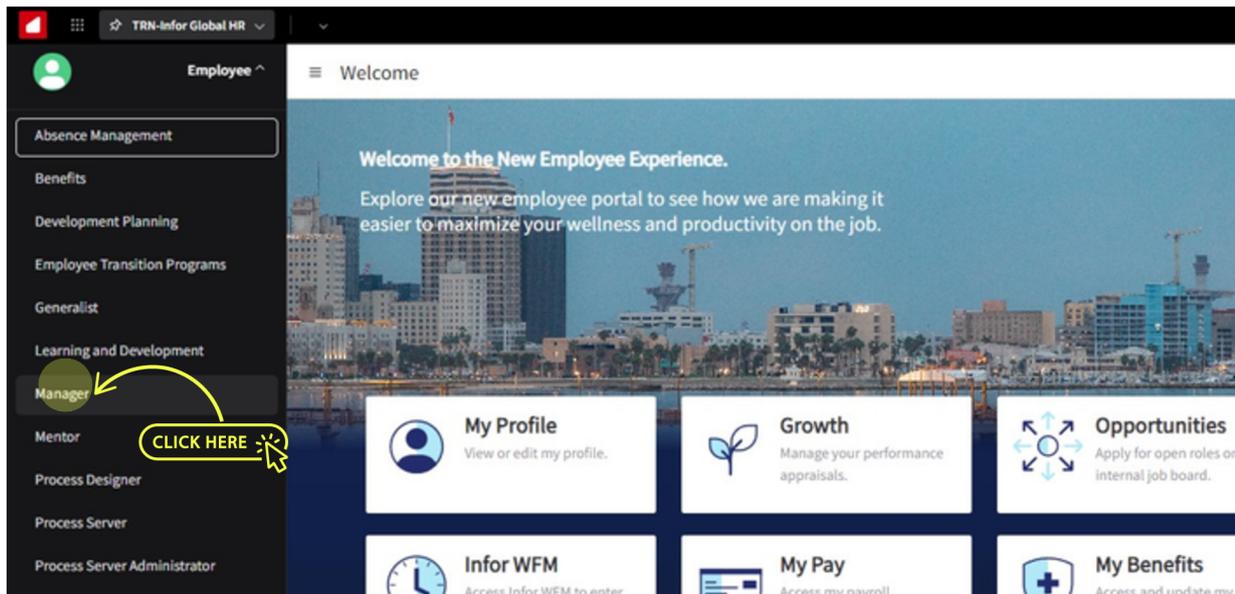


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “REVIEW PERFORMANCE”

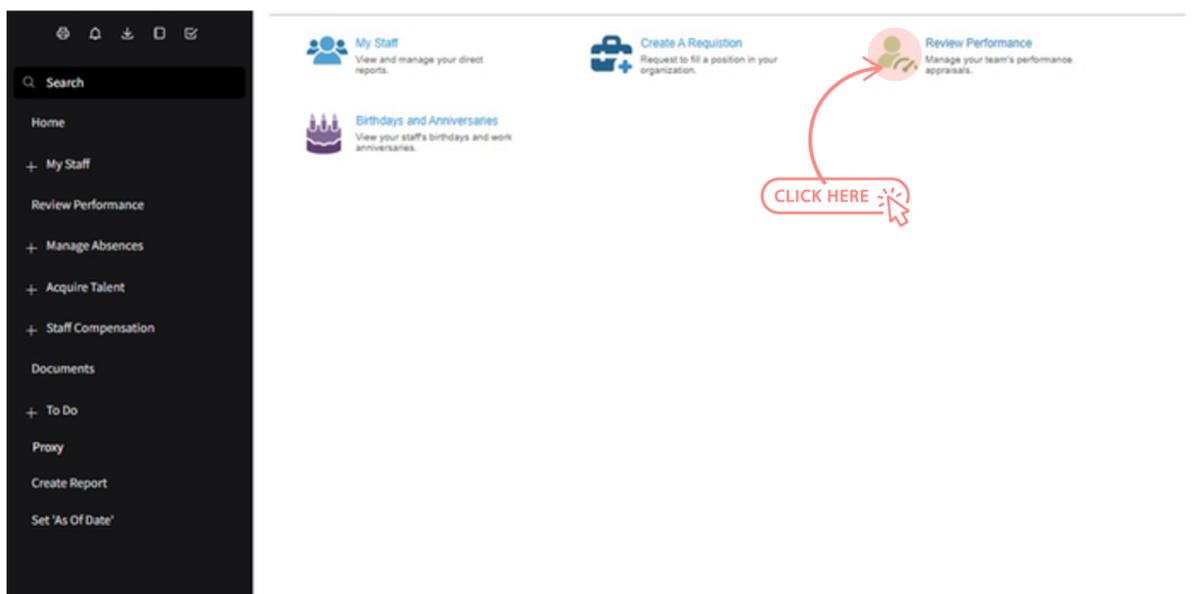


Diagram 4 : Manager Space

|| NO REVIEWS? CLICK REFRESH

GO SEE REVIEWS? SKIP TO NEXT STEP

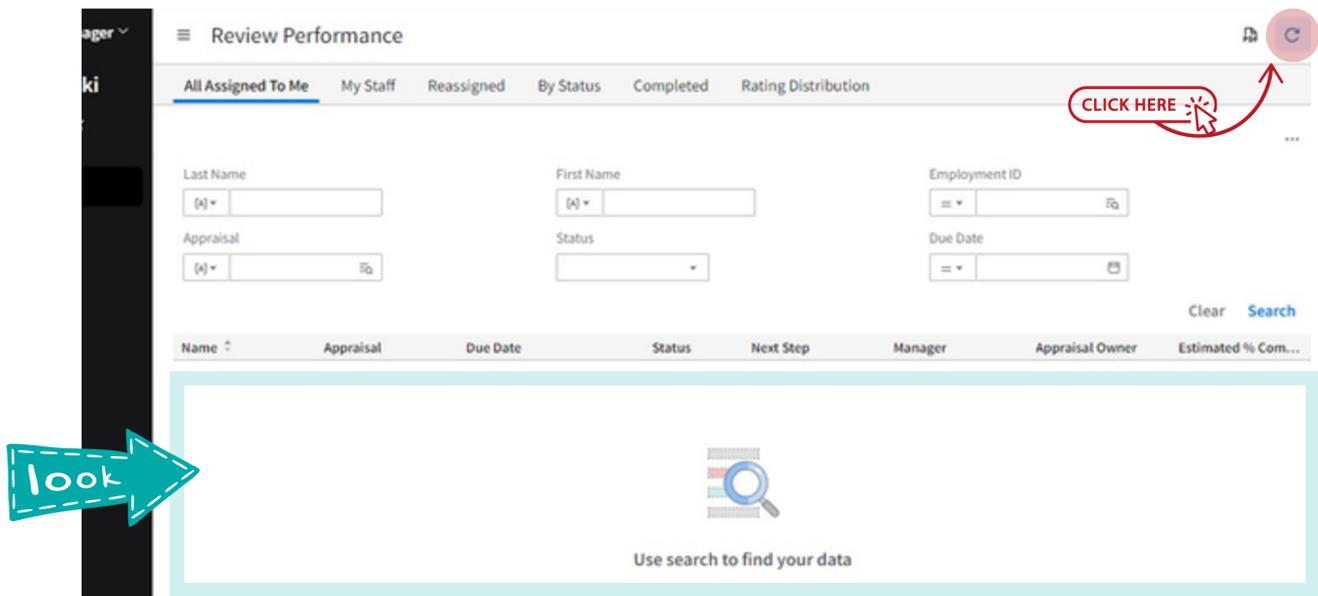


Diagram 5 : Performance Dashboard

DOUBLE-CLICK ON THE EMPLOYEE

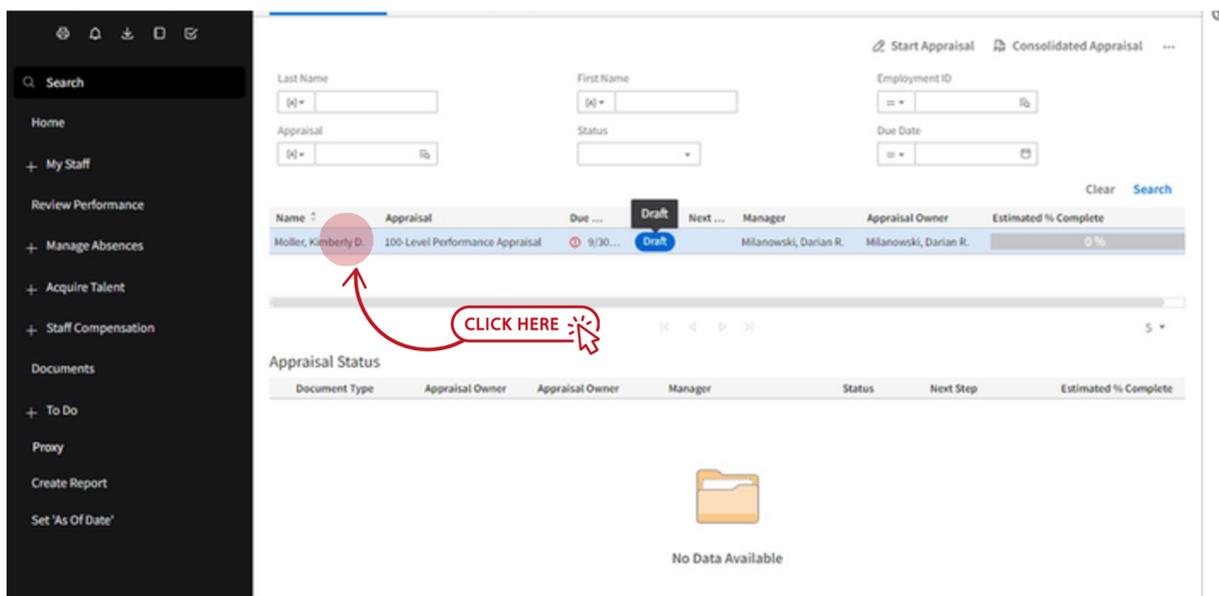


Diagram 6 : Performance Dashboard

CLICK "START APPRAISAL"

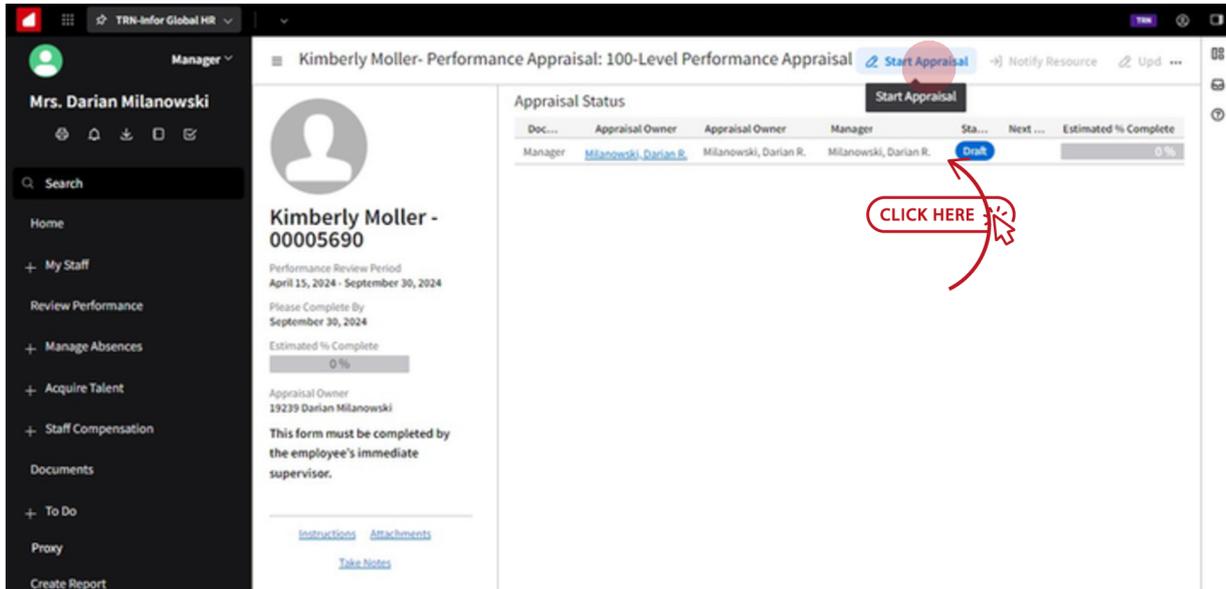


Diagram 7: Employee Performance Start Screen

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

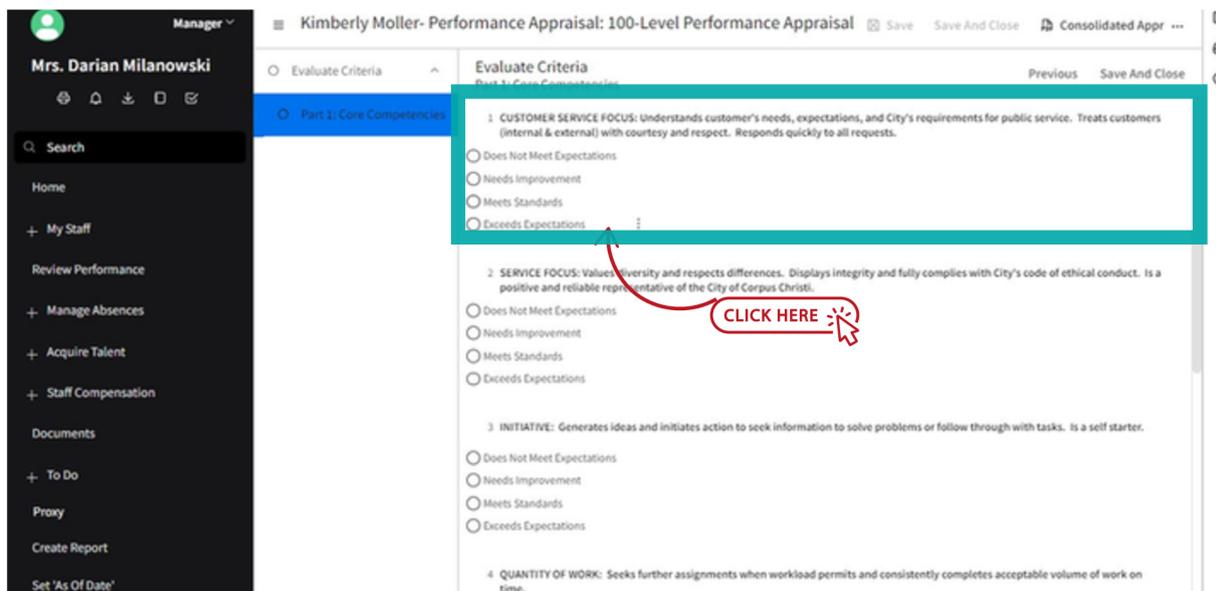


Diagram 8 : Performance Appraisals

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

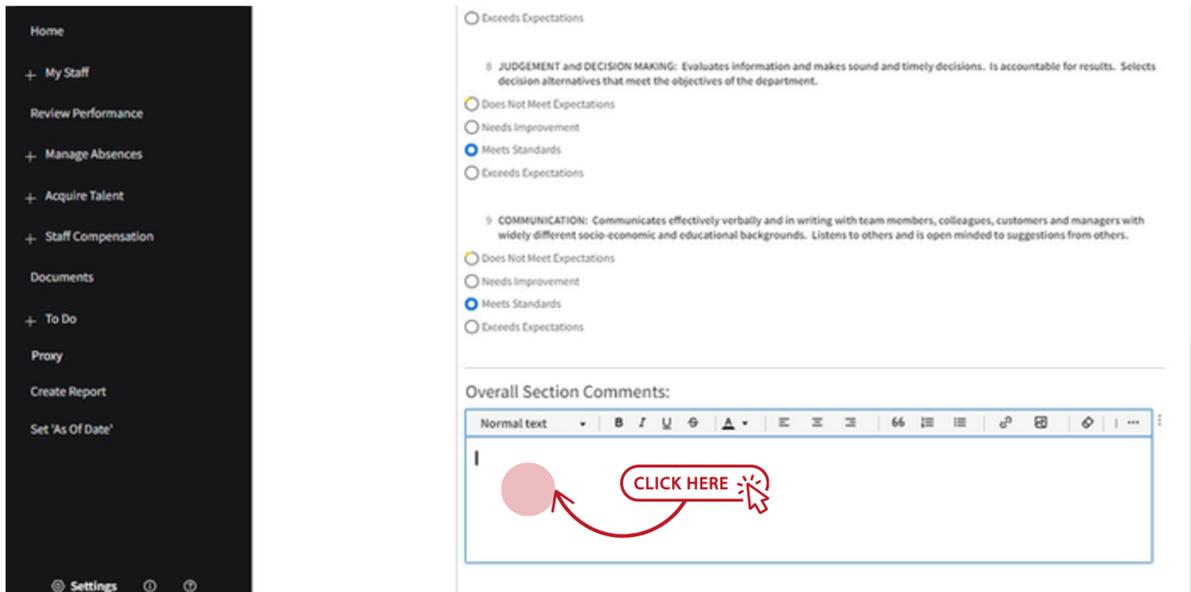


Diagram 9: Overall Section Comments

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

GO RATING A 200 EMPLOYEE? CONTINUE

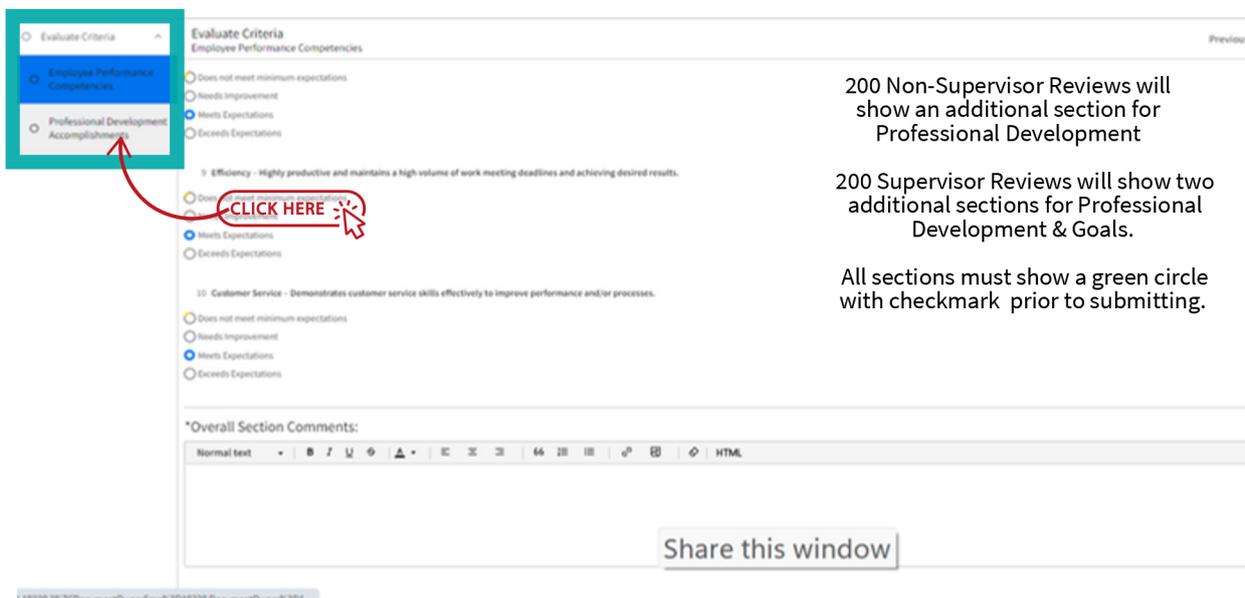
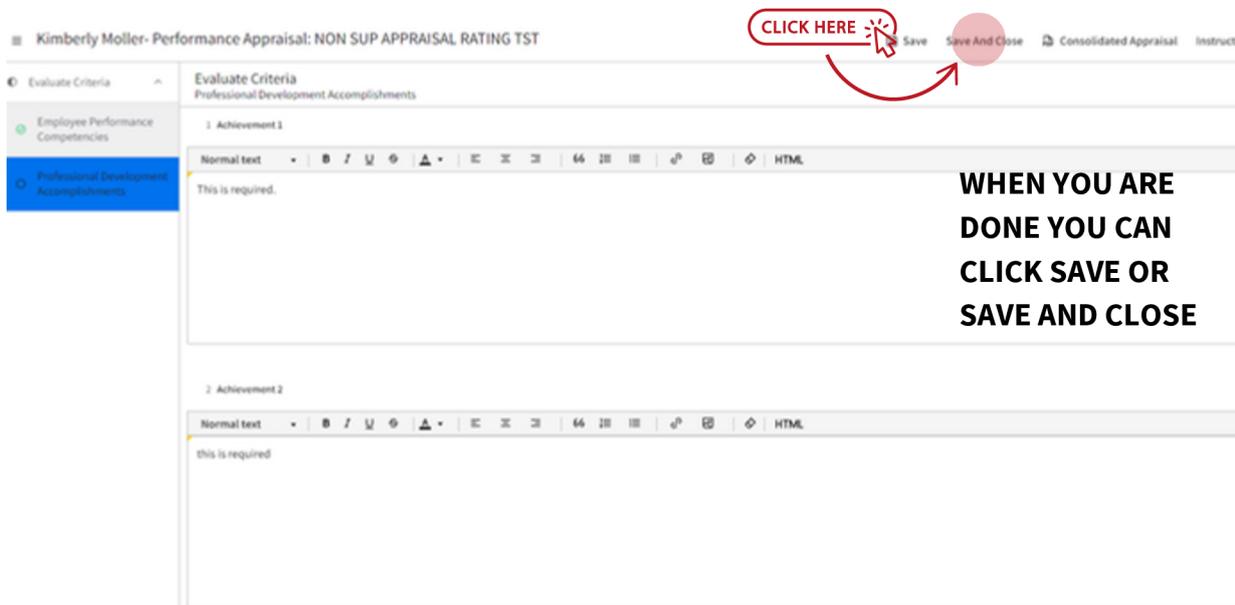


Diagram 10: Section Box

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.

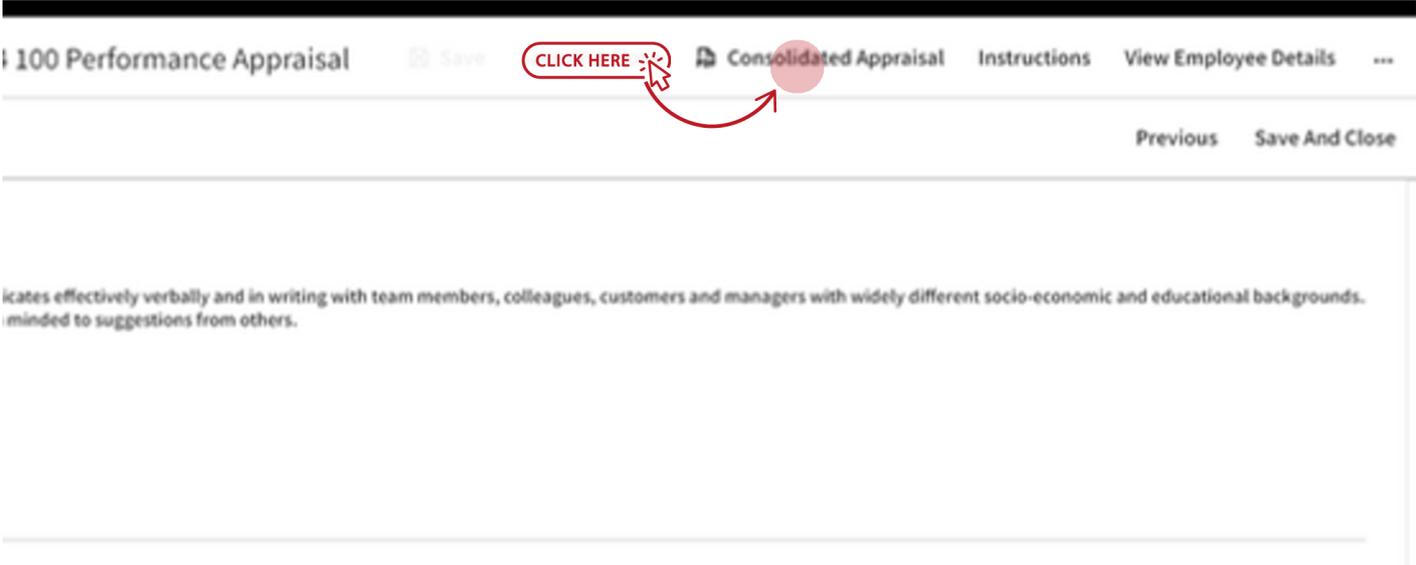


Diagram 12: Consolidated Appraisal Button

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

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

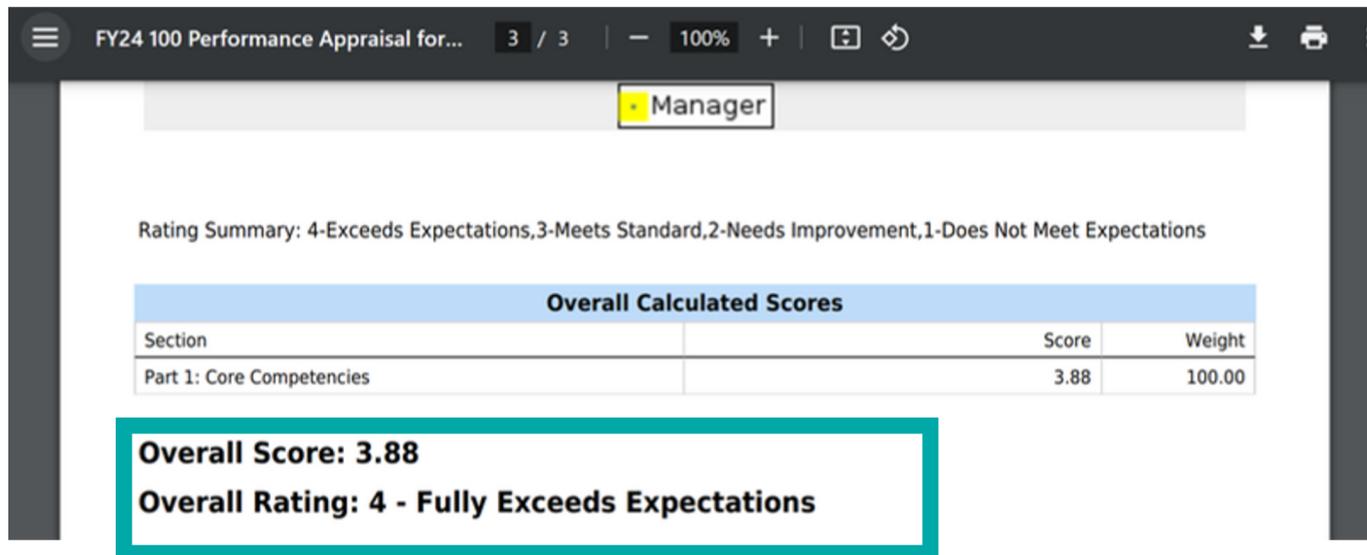
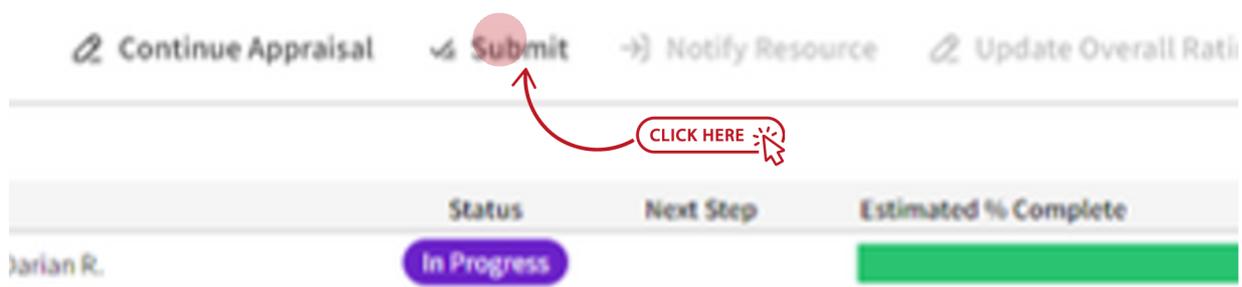


Diagram 13: Viewing the Overall Rating

CLICK ON SUBMIT TO ENTER PRE-UPLINE APPROVAL STATUS

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



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.

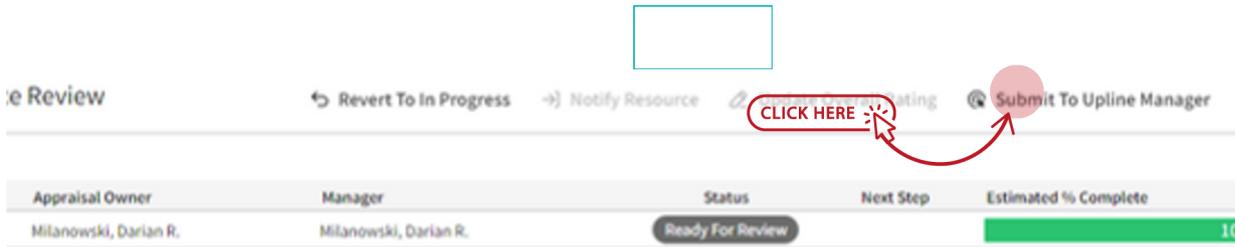
THE STATUS SHOULD CHANGE TO “READY FOR REVIEW”

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.

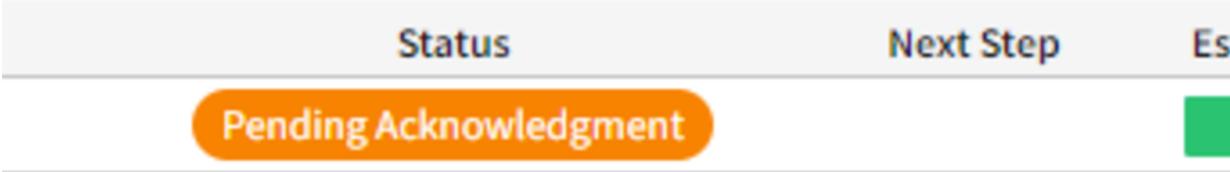


Diagram 16: Upline Approval Success

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

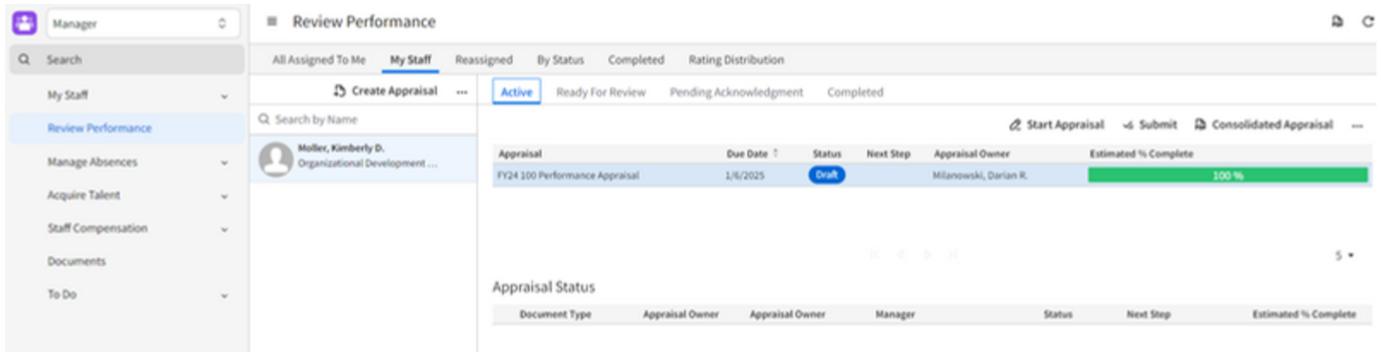


Diagram 1 : My Staff Tab

SELECT THE EMPLOYEE AND CLICK ON START APPRAISAL

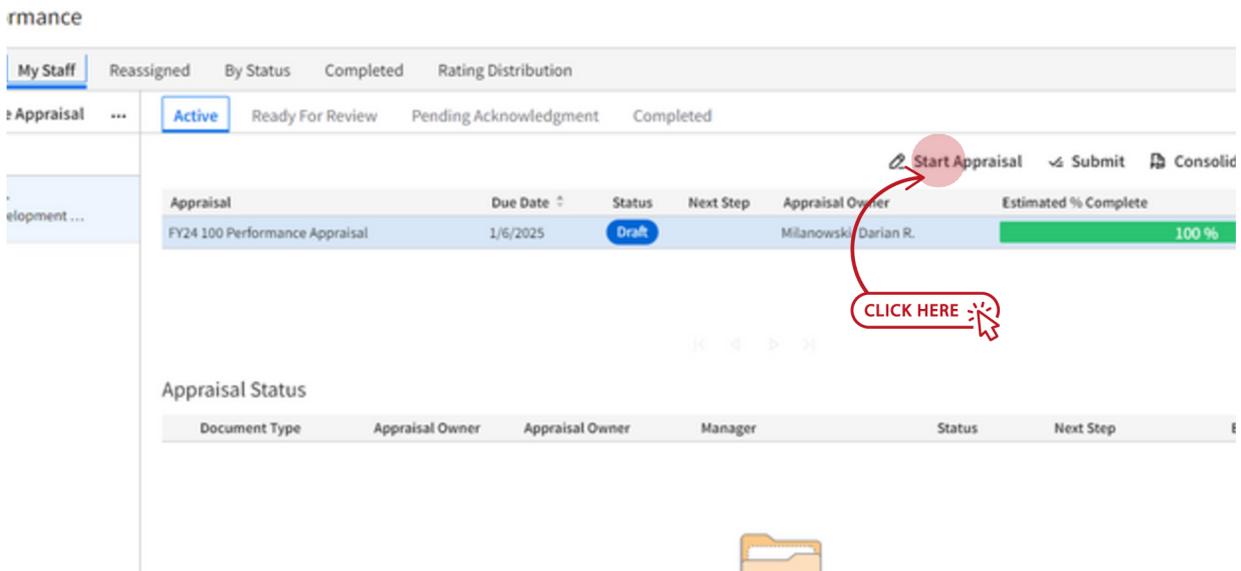


Diagram 2 : Employee Appraisal Launch Page



VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

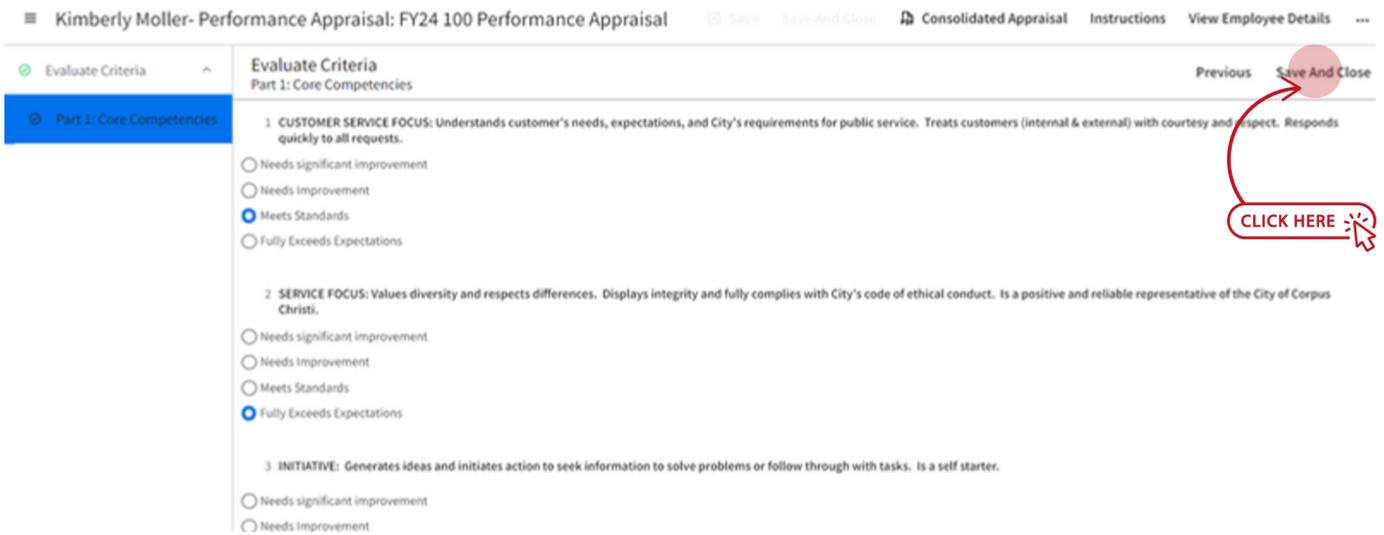


Diagram 3 : Employee Appraisal Screen

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

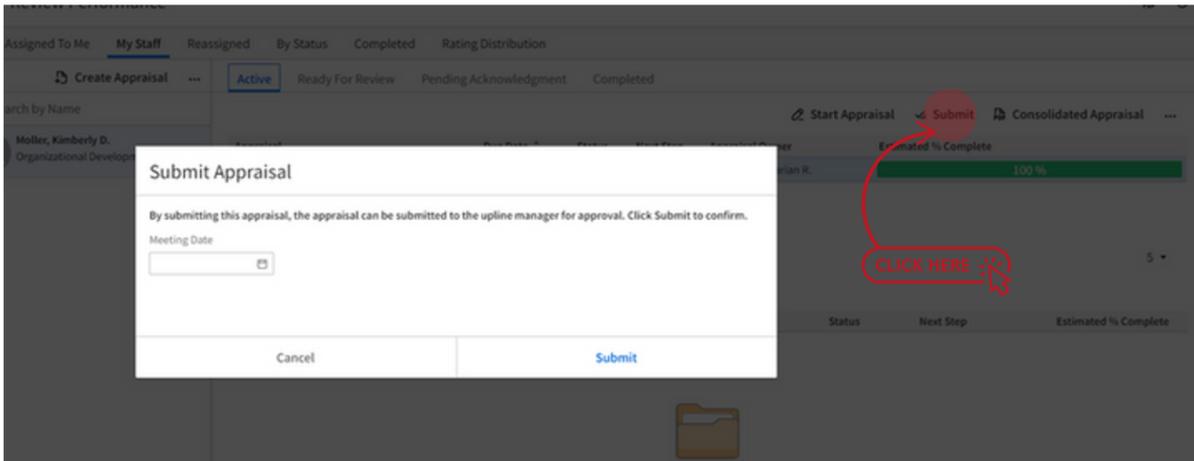


Diagram 4 : Submit Appraisal Process



VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

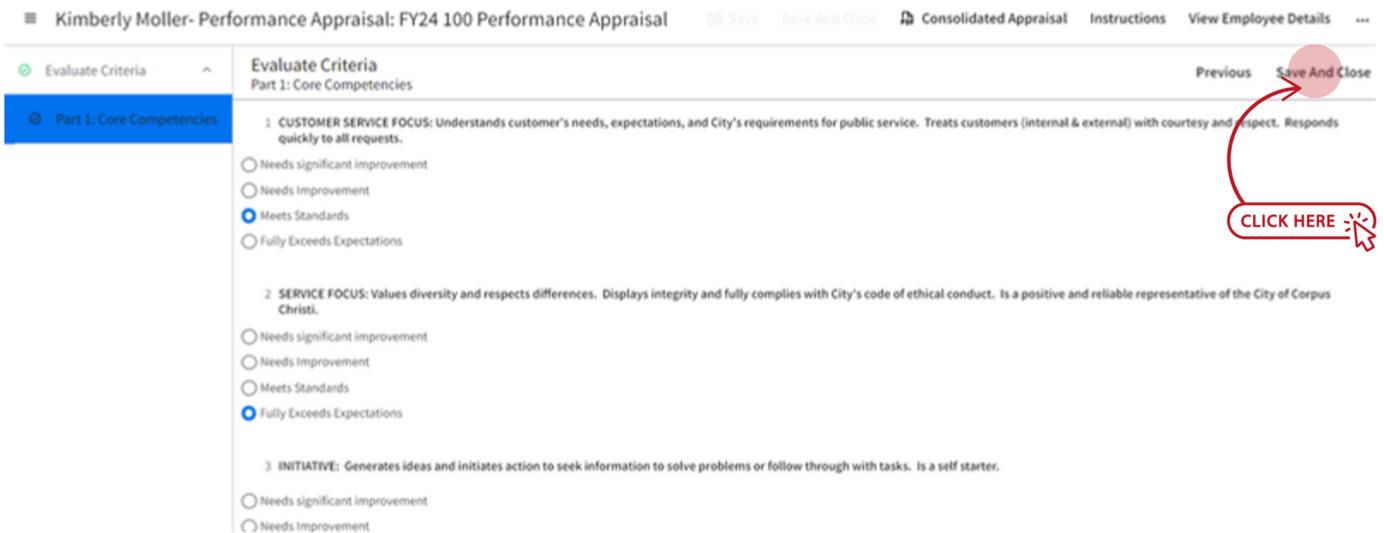


Diagram 5 : Employee Appraisal Screen

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

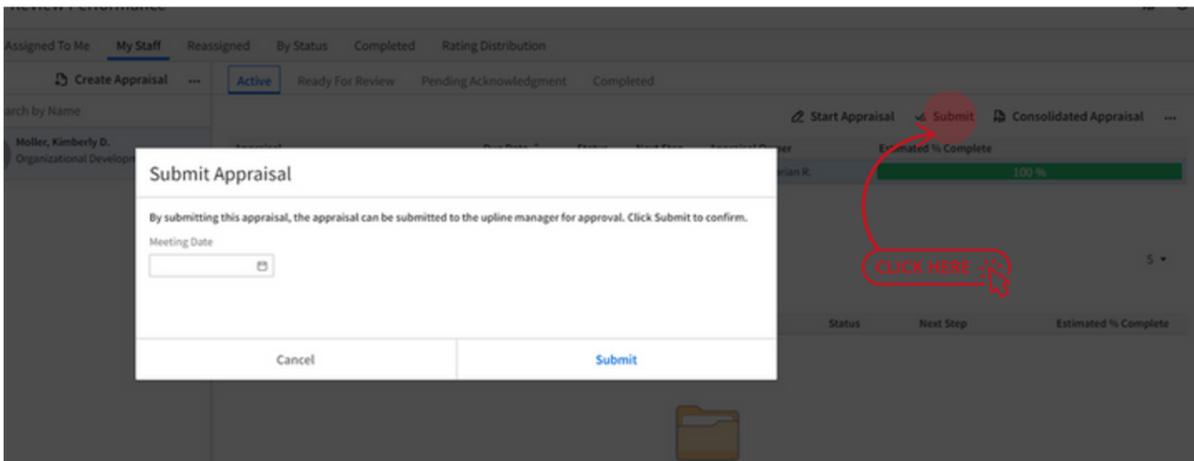


Diagram 6 : Submit Appraisal Process



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

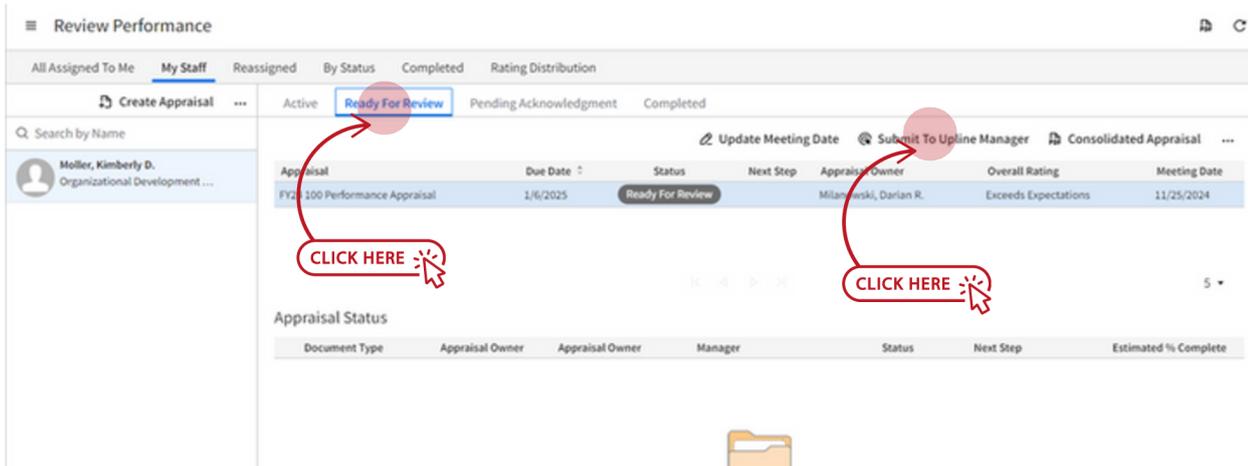


Diagram 7 : Ready for Review Tab

**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.**

UPLINE APPROVAL GUIDE

If you do not have direct reports who are managers, please skip.

FIRST STEP: LOGIN INTO INFOR

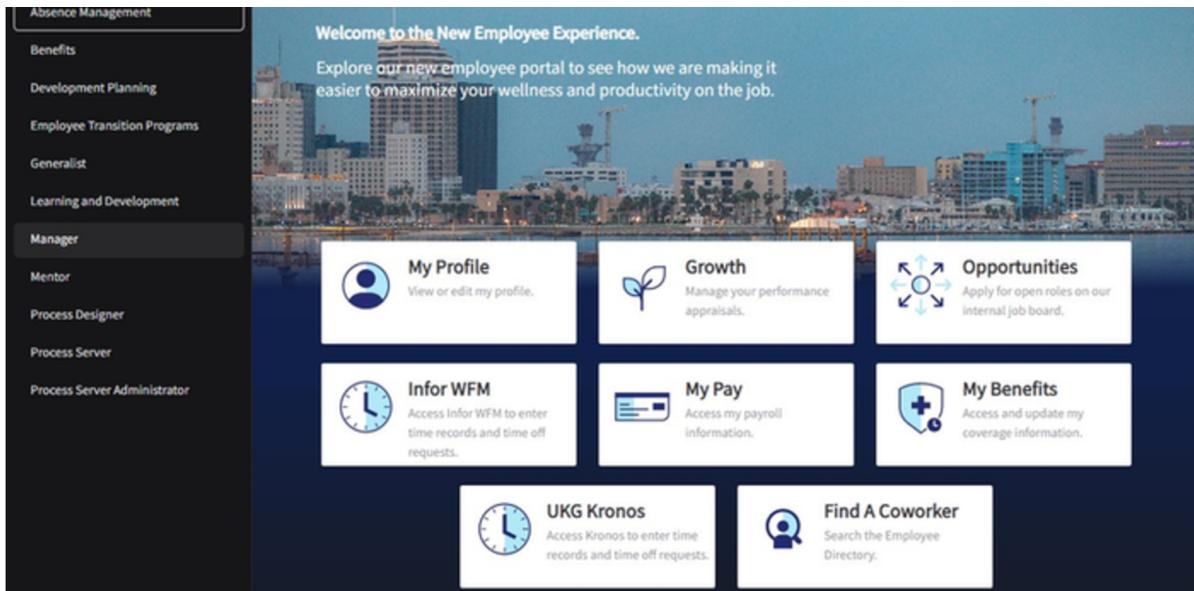


Diagram 1 : Infor Landing Page

CLICK ON “EMPLOYEE”

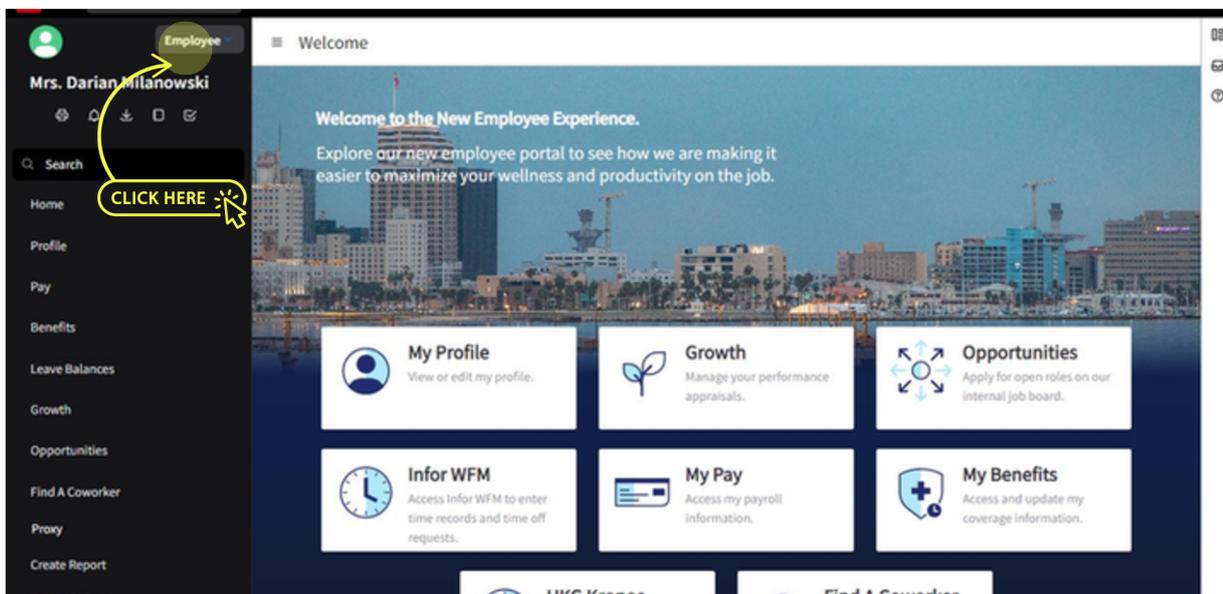


Diagram 2 : Left Hand Bar Dropdown



ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

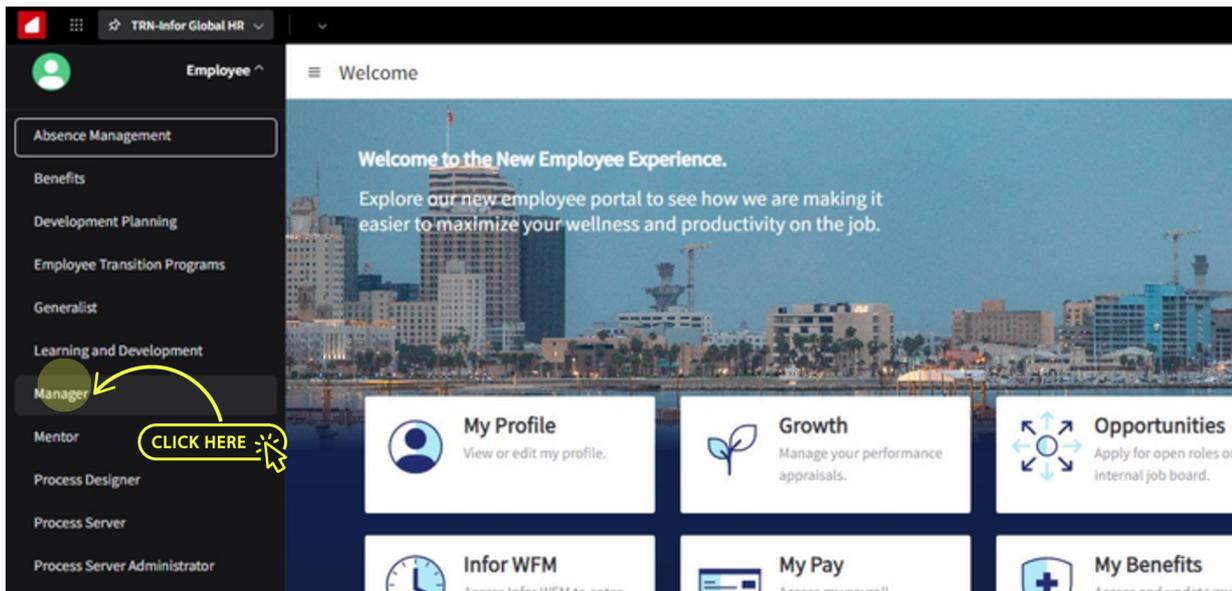


Diagram 3 : Left-Bar Dropdown Menu

CLICK ON “NOTIFICATIONS”

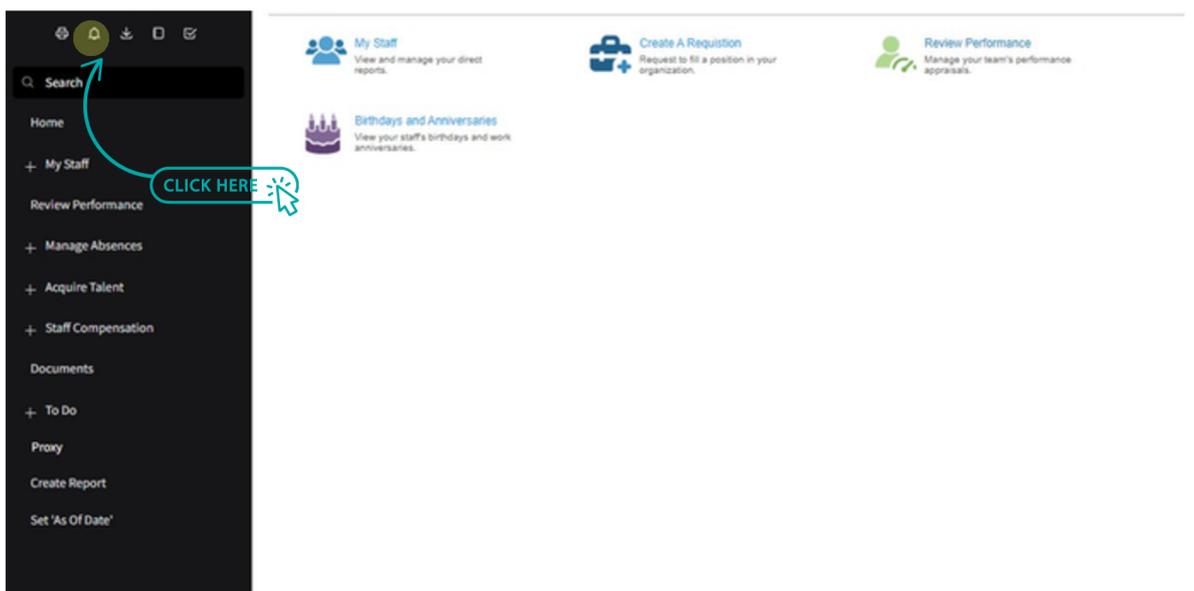


Diagram 4 : Manager Space

ON YOUR DROPDOWN MENU, CLICK ON “MANAGER”

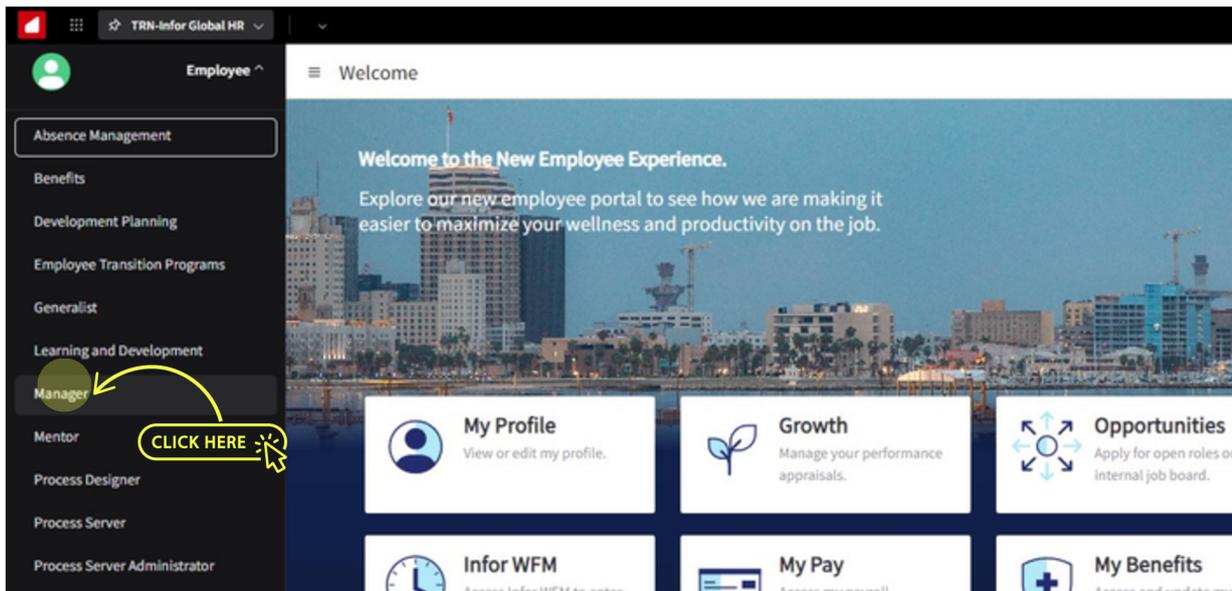


Diagram 5 : Left-Bar Dropdown Menu

CLICK ON “NOTIFICATIONS”

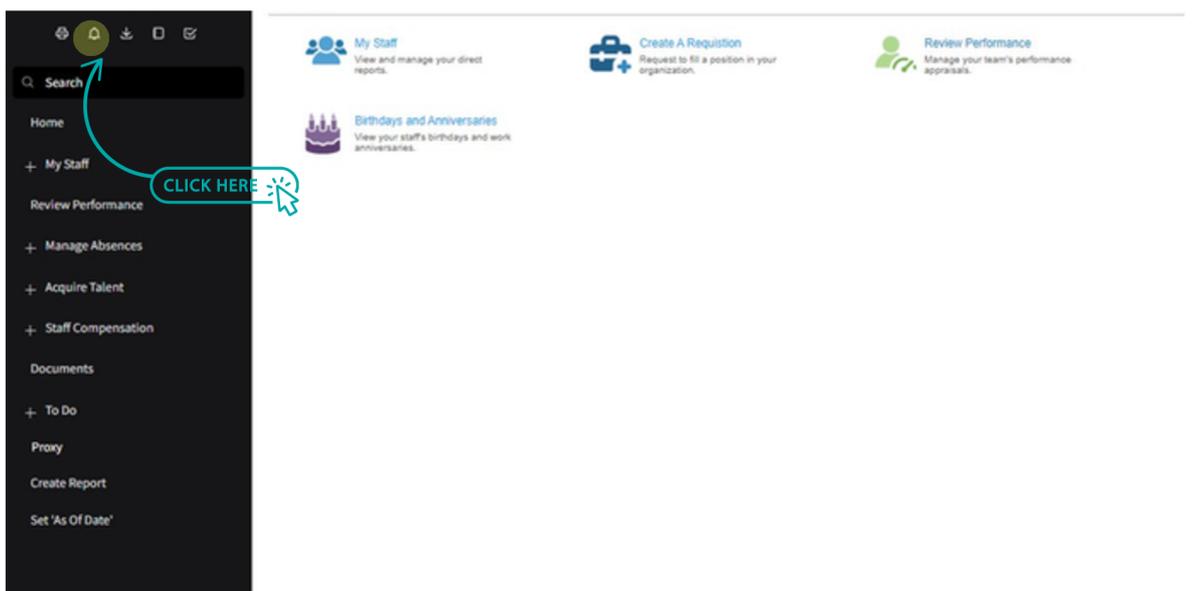


Diagram 6 : Manager Space

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

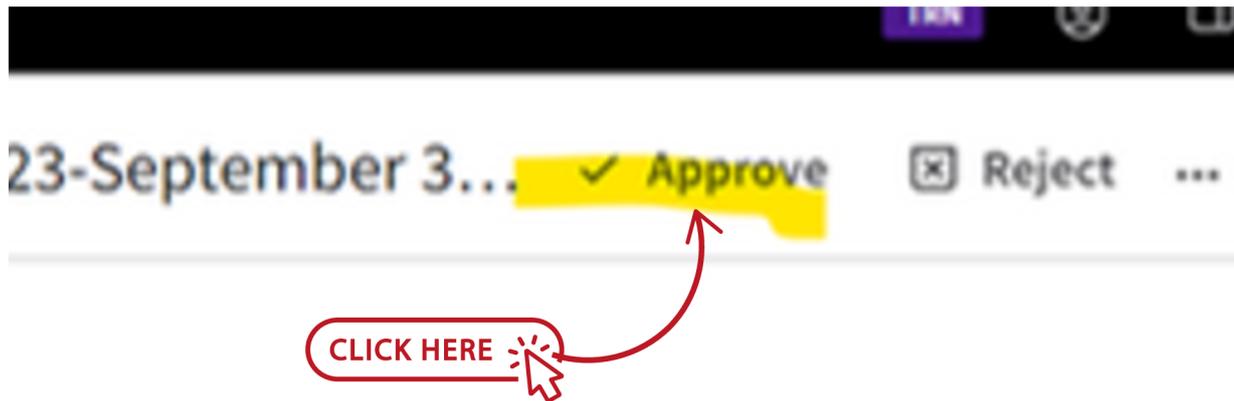


Diagram 7 : Upline Approval Screen Part 2

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

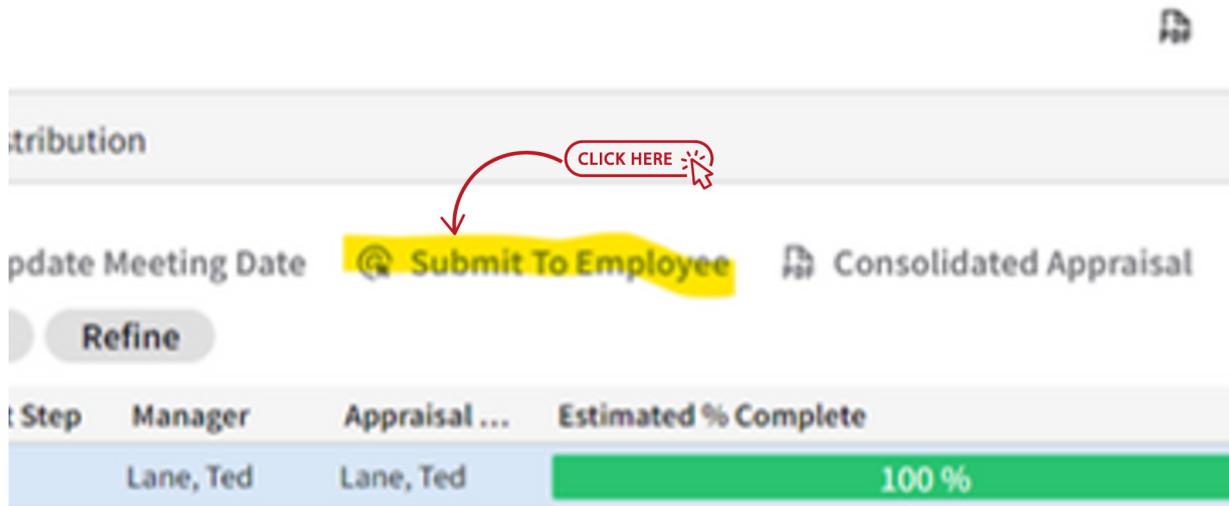
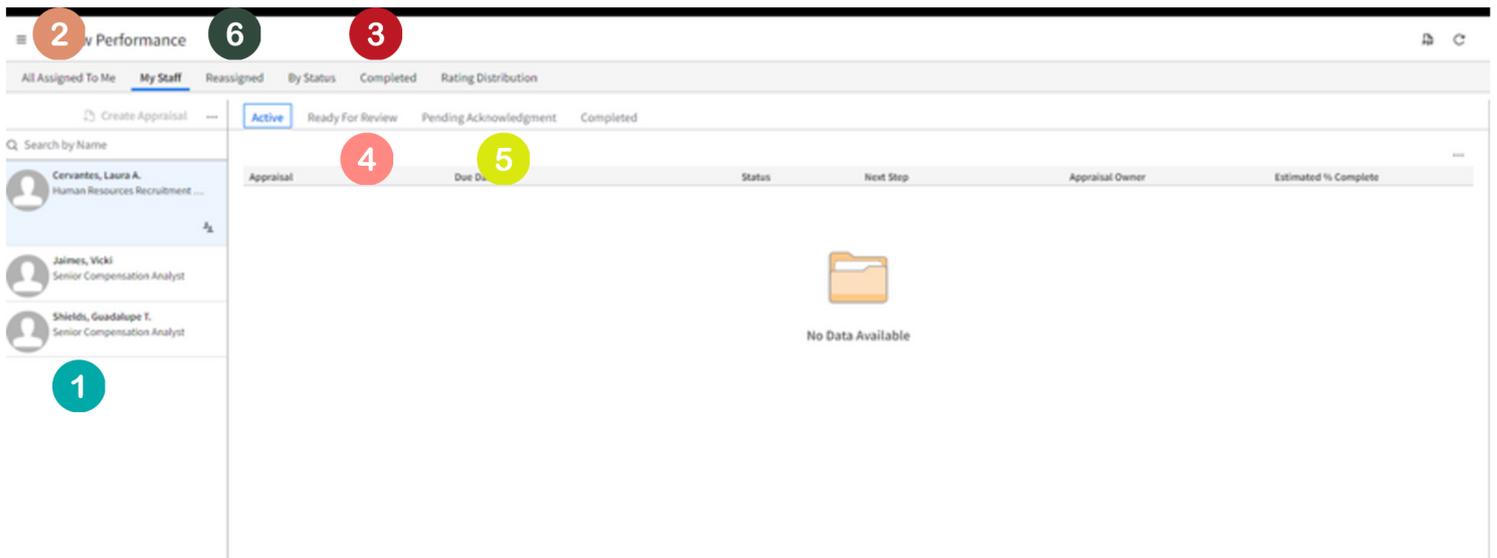


Diagram 1 : Submit to Employee

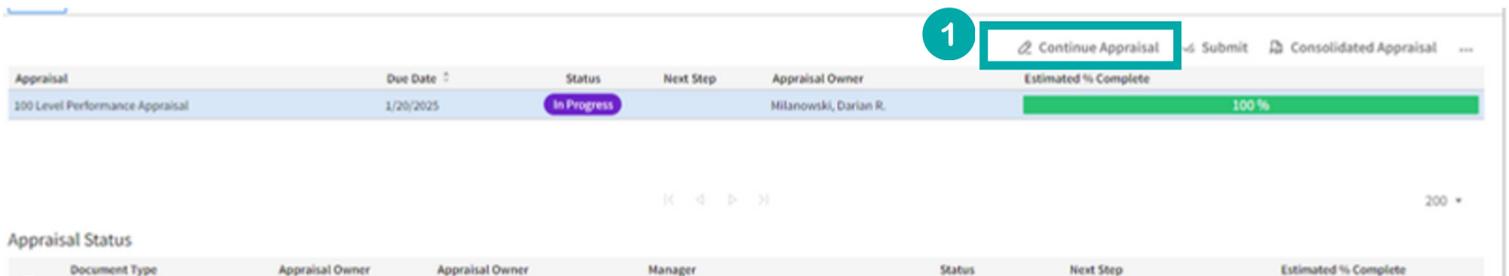
AFTER EMPLOYEE SUBMITS THEIR COMMENTS AND ACKNOWLEDGEMENT: THE MANAGER WILL RECEIVE THE EMPLOYEE'S ACKNOWLEDGEMENT AND COMMENTS IN THEIR INBOX FOR A FINAL ACKNOWLEDGEMENT AND COMMENTS.

APPENDIX 1

Questions?
Email performancereviews@cctexas.com



- 1 Left Bar: View by Team Member
- 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.