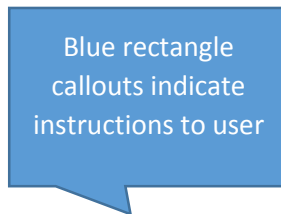


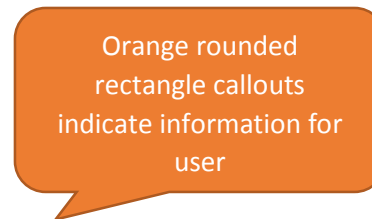
EMPLOYEE ROLE

Note: screen displays may differ slightly from the ones shown in this tutorial.

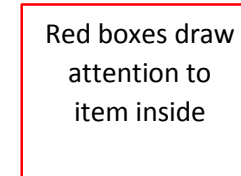
Legend:



Blue rounded rectangle callouts indicate instructions to user



Orange rounded rectangle callouts indicate information for user



Red boxes draw attention to item inside

Acknowledging your review.

Click Scheduled Tasks to begin.

Manager2, Welcome to your Talent Management Resource Center.

At Sam Houston State University, we are dedicated to "Maximizing Employee Potential" and "Enhancing Effective Leadership" through professional development and performance management.

Learning **Course Catalog** **Add External Training** **Performance** **My Team** **FAQ**

News and Events
All Learning Academies @ SHSU Sessions are posted!

Your Inbox
View transcripts





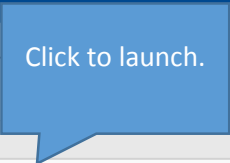
Scheduled Tasks

Tasks

Title: Search

Show completed and expired tasks (1 Result)

Title	Description	Status	Start Date	Due Date
My 2015 Six-Month Review (Manager2 Test - Clerical)	SHSU	Not Started	5/22/2015	5/23/2015



Note: Prior to you launching and acknowledging the review, ensure your supervisor has conducted a meeting with you to discuss your six-month review. Once the review meeting occurs, go to it in Talent Management and click on the title to launch.

The screenshot displays a web interface for a 2015 Six-Month Review. On the left is a navigation sidebar with five items: Overview (selected), Appraisal Factors, Overall Rating, Summary, and Acknowledgment. The main content area is titled "2015 Six-Month Review" and includes an "Options" dropdown. Below the title is a profile card for "Manager2 Test - Cleric" with a placeholder image and dates "11/4/2014 - 5/4/2015". A circular progress indicator shows "0%". The "Overview" section contains a paragraph of instructions and a "Review Step Progression" section. This section lists three steps: "Manager Review", "Review Meeting", and "Employee Aknnowledgment" (with a typo). The "Employee Aknnowledgment" step is highlighted with a blue border and a due date of "5/23/2015". A "Get Started" button is located at the bottom right. Four callout boxes provide instructions: 1. An orange box points to the title area, stating "1. Instructions for employee, supervisor, or both." 2. An orange box points to the "Overview" section, stating "2. Open circle means this step still needs to be completed." 3. An orange box points to the "Employee Aknnowledgment" step, stating "3. Blue box indicates step you are in." 4. A blue box points to the "Get Started" button, stating "4. Click to Get Started."

2015 Six-Month Review Options ▾

Overview

Appraisal Factors

Overall Rating

Summary

Acknowledgment

Manager2 Test - Cleric
All SHSU Position
11/4/2014 - 5/4/2015

0%

Overview

The **BLUE** box below indicates what step you are in. After completing the step you may return to the Home page and select "Scheduled Tasks" to see if you have any tasks left to complete. Please click the "Get Started" button to begin.

Review Step Progression

- Manager Review
- Review Meeting
- Employee Aknnowledgment**
Due: 5/23/2015

Get Started

1. Instructions for employee, supervisor, or both.

2. Open circle means this step still needs to be completed.

3. Blue box indicates step you are in.

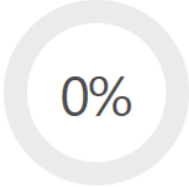
4. Click to Get Started.

Scroll down to see each of the factors rated by your supervisor. Click through to see all rated factors by clicking **Save and Continue** at the bottom of the page.

2015 Six-Month Review

Manager2 Test - Clerical
All SHSU Position
11/4/2014 - 5/4/2015

Options ▾




Appraisal Factors


This form is used to document staff employees who have completed six months of service in a new job. This form should be completed by the supervisor and the employee. See Human Resources Policy WS-2, Staff Salary Administration.

Instructions: The immediate supervisor should rate each appraisal factor as part of the employee's six-month review. Rate only appraisal factors that relate to the job performance of the employee. It is understood that the appraisal factors have different levels of importance or weight relative to the specific job.

1. Understanding and carrying out instructions

 **Director Test** (Manager) Rated: Above Average Review: 2015 Six-Month Review Time: 5/22/2015 2:54 PM

2. Quality of work

 **Director Test** (Manager) Rated: Above Average Review: 2015 Six-Month Review Time: 5/22/2015 2:54 PM

3. Quantity of work

Rating for this factor.

- Overview
- Appraisal Factors
- Overall Rating
- Summary
- Acknowledgment

2015 Six-Month Review

Options ▾

Manager2 Test - Clerical
All SHSU Position
11/4/2014 - 5/4/2015

33%

Overall Rating

Please summarize the performance over the evaluation period and indicate any suggested improvement. Then, select the most appropriate rating in the overall evaluation section to describe the overall appraisal of the employee's performance during this six-month period.

Important:
Click **Save and Continue** to view the summary page for the overall rating, or **Save and Exit** if you wish to exit the review and come back to it later. Once you select **Submit**, you will not be able to change the rating or view the overall summary page.

You will need to conduct the Review Meeting after completing the review. Please go to Home>Scheduled Tasks, click the employee's review, and in the top right corner of the screen under Options, select Print Review to print a copy of the review for the meeting. Once you have completed the Review Meeting, you will return to the appraisal to sign and acknowledge that you have completed the review by going to Home>Scheduled Tasks and selecting the employee's review once more to open it.

Summarize the performance over the evaluation period:

Director Test (Manager) Review: 2015 Six-Month Review Time: 5/22/2015 2:59 PM
This is an above average employee overall who can benefit from some additional professional development opportunities.

Indicate or list suggested ways, if any, employee can improve job performance:

Director Test (Manager) Review: 2015 Six-Month Review Time: 5/22/2015 2:59 PM
Attend two seminars per year and find a mentor to shadow in the areas that need strengthening.

Overall rating of staff employee performance:

Director Test (Manager) Rated: Exceeds Job Requirements Review: 2015 Six-Month Review Time: 5/22/2015 2:59 PM
I'm confident that this employee will demonstrate future growth and be a valuable asset to the team.

Back Save and Exit Save and Continue

Click Save and Continue.

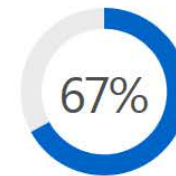
6

2015 Six-Month Review

Options ▾



Manager2 Test - Clerical
All SHSU Position
11/4/2014 - 5/4/2015



- Overview
- Appraisal Factors
- Overall Rating
- Summary**
- Acknowledgment

Optional: Click the question mark for insight into the rating scale.

Summary

Overall Rating ?

Exceeds Job Requirements

Back Next

The screenshot shows a 'Rating Scale' dialog box with a close button (X) in the top right corner. The dialog contains a table with two columns: 'Rating' and 'Description'. The table lists five performance levels: 'Does Not Meet Job Requirements', 'Meets Job Requirements', 'Exceeds Job Requirements', 'Outstanding', and 'Excellent'. Each level has a corresponding description of performance. Below the table is a 'Close' button. A blue callout bubble points to the 'Close' button with the text 'Click to Close.'. In the background, a circular progress indicator shows 67% completion, and there are 'Options' and 'Next' buttons visible.

Rating	Description
Does Not Meet Job Requirements	Overall performance of job responsibilities and productivity is sometimes at a level below what is normally expected or required.
Meets Job Requirements	Overall performance of job responsibilities and productivity is at a level that is normally expected or required.
Exceeds Job Requirements	Overall performance of job responsibilities and productivity is at a level that is often (>50% of the time) above that which is normally expected or required.
Outstanding	Overall performance of job responsibilities and productivity is at a level that is usually (>70% of the time) above that which is normally expected or required.
Excellent	Overall performance of job responsibilities and productivity is at a level that is consistently (>90% of the time) above that which is normally expected or required.

Rating scale insight.

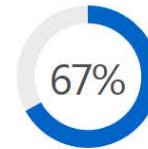
2015 Six-Month Review

Options ▾

- Overview
- Appraisal Factors
- Overall Rating
- Summary**
- Acknowledgment



Manager2 Test - Clerical
All SHSU Position
11/4/2014 - 5/4/2015



Summary

Overall Rating ⓘ
Exceeds Job Requirements

Click Next.

Back

Next

The screenshot shows a web interface for a "2015 Six-Month Review". On the left is a navigation sidebar with five items: Overview, Appraisal Factors, Overall Rating, Summary, and Acknowledgment (which is selected). The main content area is titled "2015 Six-Month Review" and includes a profile card for "Manager2 Test - Clerical" with a 67% progress indicator. Below this is the "Acknowledgment" section, which contains explanatory text and a checkbox for electronic approval. A "Sign" button is positioned to the right of the checkbox. At the bottom of the section is a rich text editor with a toolbar and a text area containing "Thanks for the feedback!". At the very bottom are "Back", "Save and Exit", and "Submit" buttons. Three blue callout boxes provide instructions: "1. Click the box to acknowledge the review meeting has occurred." points to the checkbox; "2. Optional: Add your comment here." points to the text editor; "3. Click Sign." points to the "Sign" button.

2015 Six-Month Review Options ▾

Manager2 Test - Clerical
All SHSU Position
11/4/2014 - 5/4/2015

67%

Acknowledgment

This is the final step in the Appraisal process. Your signature on this page indicates that your supervisor has reviewed the appraisal with you and that you have received feedback. Your signature does not mean that you concur with the rating, merely that you acknowledge the review meeting has occurred. Upon completion of your review, please select the Acknowledgment checkbox and click **Sign** to acknowledge the appraisal. A section is provided for you to make comments regarding your evaluation.

Employee

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

Sign

B I S U [List] [Align] [Undo] [Redo] [ABC]






Thanks for the feedback!

Back Save and Exit **Submit**

1. Click the box to acknowledge the review meeting has occurred.

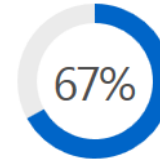
2. Optional: Add your comment here.

3. Click Sign.

-  Overview
-  Appraisal Factors
-  Overall Rating
-  Summary
-  **Acknowledgment**



Manager2 Test - Clerical
 All SHSU Position
 11/4/2014 - 5/4/2015



Acknowledgment


































This is the final step in the Appraisal process for the employee.

Your signature on this page indicates that your supervisor has reviewed the appraisal with you and that you have received feedback. Your signature does not mean that you concur with the rating, merely that you acknowledge that you have received it. Upon completion of your review, please select the Acknowledgment checkbox and print a copy of your appraisal. A section is provided for you to make comments regarding your

Employee
 Manager2 Test - Clerical Date: 5/22/2015

Redo

If Redo displays, click only if the date of signature needs to be reaccomplished.

B I S U                                  

The screenshot shows a web interface for completing a six-month review. A modal dialog box titled "Submit Review" is centered on the screen. The dialog contains the text: "You will not be able to modify once you have submitted. Are you sure that you want to submit now?". At the bottom of the dialog are two buttons: "Cancel" and "Submit". A blue callout box with the text "4. Click Submit." points to the "Submit" button. In the background, a sidebar on the left lists navigation items: Overview, Appraisal Factors, Overall Rating, Summary, and Acknowledgment (which is highlighted). To the right of the sidebar, there is a circular progress indicator showing 67% completion. Below the dialog, the "Acknowledgment" section is visible, containing instructions and a "Redo" button.

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel Submit

4. Click Submit.

Options ▾

67%

Acknowledgment

This is the final step in the Appraisal process for the employee.

Your signature on this page indicates that your supervisor has reviewed the appraisal with you and that you have received feedback. Your signature does not mean that you concur with the rating, merely that you acknowledge that you have received it.

Upon completion of your review, please select the Acknowledgment checkbox and click **Sign** to acknowledge receipt of your appraisal. A section is provided for you to make comments regarding your evaluation.

Employee
Manager2 Test - Clerical Date:5/22/2015 Redo

Be sure you are done prior to clicking **Submit**. Once this is selected, only an HR system administrator can reopen the review.

sity

The screenshot displays a user interface for a six-month review. On the left is a vertical navigation menu with five items: 'Overview' (home icon), 'Appraisal Factors' (checkmark), 'Overall Rating' (checkmark), 'Summary' (checkmark), and 'Acknowledgment' (checkmark). The main content area is titled '2015 Six-Month Review' and features a profile card for 'Manager2 Test - Clerical' (All SHSU Position, 11/4/2014 - 5/4/2015) and a large circular progress indicator showing '100%'. A callout box points to an 'Options' dropdown menu with the text: 'To print review, click on Options drop down arrow.' Below the progress indicator, a message states: 'You have completed this step of the review process. Return to Scheduled Tasks to see if you have any tasks left to complete.'

Review is complete. You may print a copy for your records by clicking on the Options drop down arrow.

You may return to **Home>Scheduled Tasks** to see if any other tasks have been assigned to you.

To return to the completed review, go to **Home>Scheduled Tasks**.

Home Learning Knowledge Performance Reports My Team

Scheduled Tasks

Tasks

Title: Type: All Types

Show completed and expired tasks (25 Results) << < 1 2 >>

Title	Description	Status	Start Date	Due Date
2015 Six-Month Review of Manager4 Test - Administrative	SHSU	Expired	3/20/2015	3/21/2015
2015 Six-Month Review of Manager4 Test - Administrative	SHSU	Expired	4/1/2015	4/24/2015
2015 Six-Month Review of Manager4 Test - Administrative	SHSU	Completed	4/4/2015	5/27/2015
2015 Six-Month Review of Manager4 Test - Administrative	SHSU	Completed	4/9/2015	5/23/2015
My 2015 Six-Month Review (Director Test)	SHSU	Incomplete	5/15/2015	5/16/2015

You can always see the progress of your reviews here. *Note: Due dates may vary depending on the step you are in for the review and the date of completion of the previous step.*

Once you acknowledge a review, it will go from being an **In Progress** or **Incomplete** task to a **Completed** task. Click “Show completed and expired tasks” to view all completed reviews. Talent Management will retain a permanent copy in the system. To re-enter the completed review for viewing or printing, click on the review.