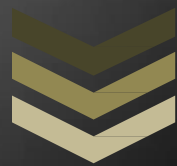


Perform by Trakstar Guide



for Staff

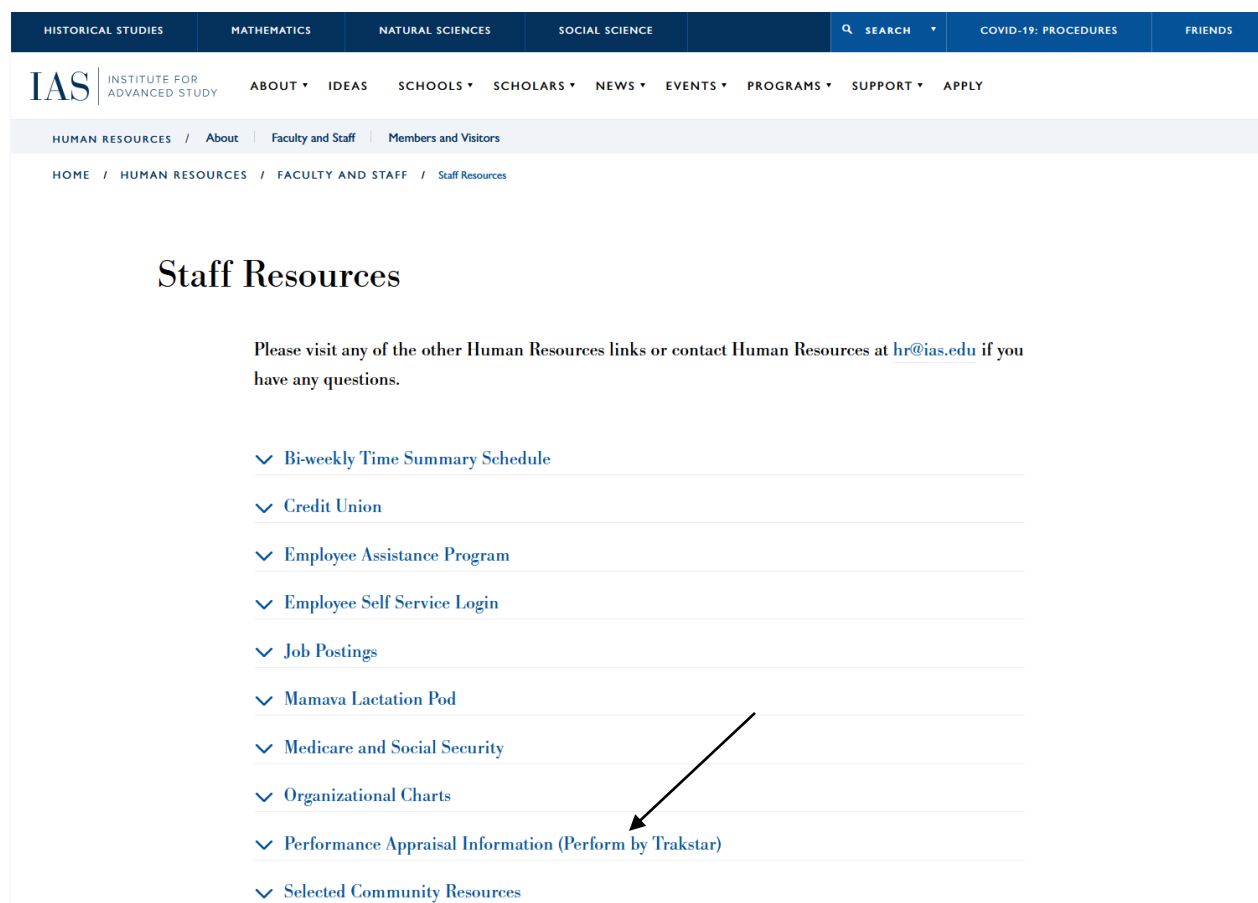
Perform by Trakstar Guide for Staff

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I. Logging In to Perform by Trakstar

The link to access Perform by Trakstar has been added to the IAS website under the *Campus Resources/Working at IAS/Human Resources/Faculty and Staff/Staff Resources/Performance Appraisal Information* dropdowns or click on the following link: <https://www.ias.edu/human-resources/faculty-and-staff/staff-resources>



When you select “*Performance Appraisal Information*” it will take you to the login page, so long as you are not already logged into another application. The program is enabled with single sign-on for ease in use.

If prompted to login, both the username and password are the same as your IAS credentials.

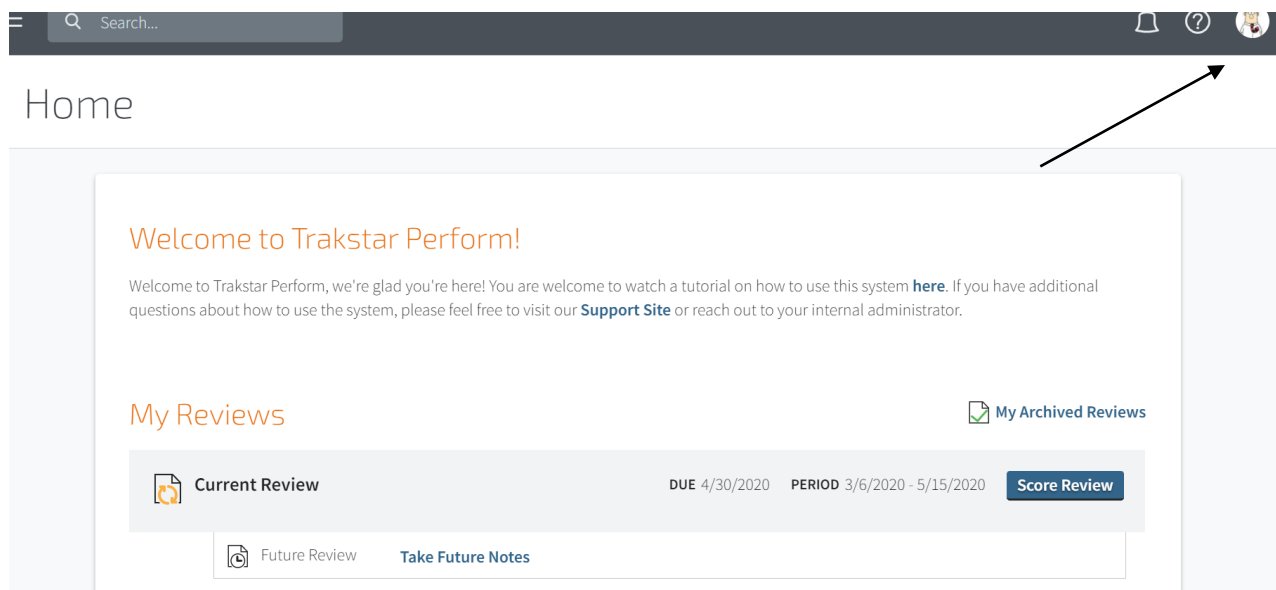
II. Taking Notes in Your Performance Review

Once the goals and professional development objectives have been established, it is up to your manager to reflect this information in the performance review form.

Please note that only managers have the ability to change a goal or objective that was established during the beginning of the performance cycle.

The performance review form allows both managers and employees the opportunity to take notes and provide updates throughout the year about the established goals and objectives, and the training and development goals.

Click the circle icon in the upper righthand corner which contains your initials. From here you can open your profile settings to write notes throughout the year as well as to start your self-review.



Step 1: To access notes click on the “My Notes” on the top left side of the page.

Step 2: Insert your note

During this step, you have the option to type in a note, or attach a file that might be relevant for your performance review. You also have the ability to share the note with your manager, or to keep the note private so only you have access. Once completed, select **Add This Note** or **Attach a File**

The notes function can be used in the same manner for any rating category (Performance Objectives, Training and Development, and Core Competencies), as well as for the self-review.

The screenshot displays the 'Annual Review' interface. At the top, there's a header with a document icon and the title 'Annual Review'. To the right, there's a 'Choose Review' dropdown menu. Below the header, there are two columns of information: 'MANAGER' (Mister z Manager), 'POSITION' (1 - Default), and 'PROCESS' (Annual) on the left; and 'ARCHIVE DATE' (5/15/2020), 'PERIOD' (3/6/2020 - 5/15/2020), and 'STATUS' (Scoring) on the right. The main section is titled 'Dilbert z Employee' with a small cartoon icon. Below the title is a large text area for notes. Above this text area is a toolbar with buttons for 'Bold', 'Italics', 'Underline', 'Bullets', 'Numbers', and 'Link'. An arrow points to the 'Underline' button. Below the text area, there's a section titled 'VISIBLE TO MY MANAGERS' with 'Yes' and 'No' radio buttons. The 'No' button is selected. Below this is a dropdown menu with the text 'Choose an element (recommended)'. An arrow points to the dropdown arrow. At the bottom, there are two buttons: 'Cancel' and 'Attach a file'. To the right of these is a blue button labeled 'Add this note'.

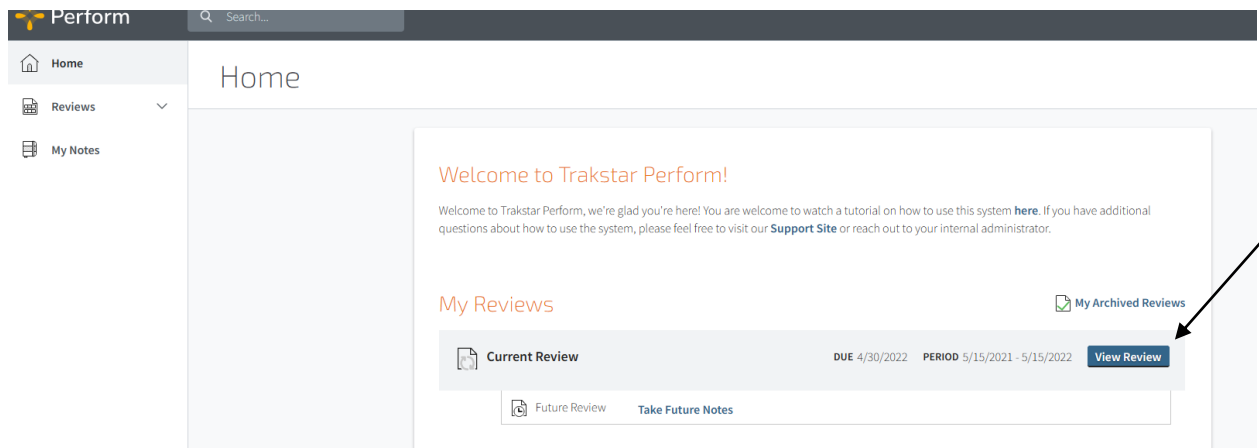
III. Year-End Review Process

Approximately one month before the year-end reviews are due, managers will have the opportunity to rate their employees in the Performance Objectives, Training and Development, and Core Competencies sections. managers will also be required to provide an overall performance assessment. Also, at this time, employees will be responsible for completing the self-review section. Any notes taken throughout the year will be available during this stage. As a reminder, those notes that were marked as being private will remain visible to you only through all stages of the performance review process.

Step 1: Access the Self Review

At the beginning of the year-end review process period, you will be provided with the option to complete your self-review, which is located at the bottom of the performance review form.

When you log into Perform by Trakstar, please select **View Review**. This will take you to your current evaluation.



Step 2 – Completing the Self Review

Scroll down to the bottom of the review to access the eight **Self-Review Questions** section. You will have the opportunity to add in any comments and notes to be shared with your manager. These comments can be added to the Notes section of the form.

Home

Reviews

Current Review

Future Review

Archived

My Notes

Top

Performance Objectives 0%

Collect and track incoming me...

Assist in the hiring process by id...

Cover reception during lunches...

Coordinate and staff the IAS me...

Provide administrative support ...

Handles the Summer Student P...

Manages the Wellness Program ...

Training and Professional ... 0%

Visio

Core Competencies 0%

Communication

Accountability

Teamwork

Dependability

Quality of Work

Managerial Competencies 0%

Managing Performance of Others

Leadership

Overall Performance 100%

Overall Assessment 100%

Self-Review Questions 0%

1. Position Responsibilities

2. Position Responsibilities

3. Accomplishments

4. Accomplishments

Self-Review Questions 0%

1. Position Responsibilities

Which specific 3 - 5 position responsibilities do you view as most important? Why?

Notes (0)

Add a note...

2. Position Responsibilities

Have there been any special circumstances that have helped or hindered you in doing your position this year? If yes, what were the circumstances and how did they affect your work?

Notes (0)

Add a note...

3. Accomplishments

List your most significant accomplishments or contributions during the past year.

Notes (0)

Add a note...

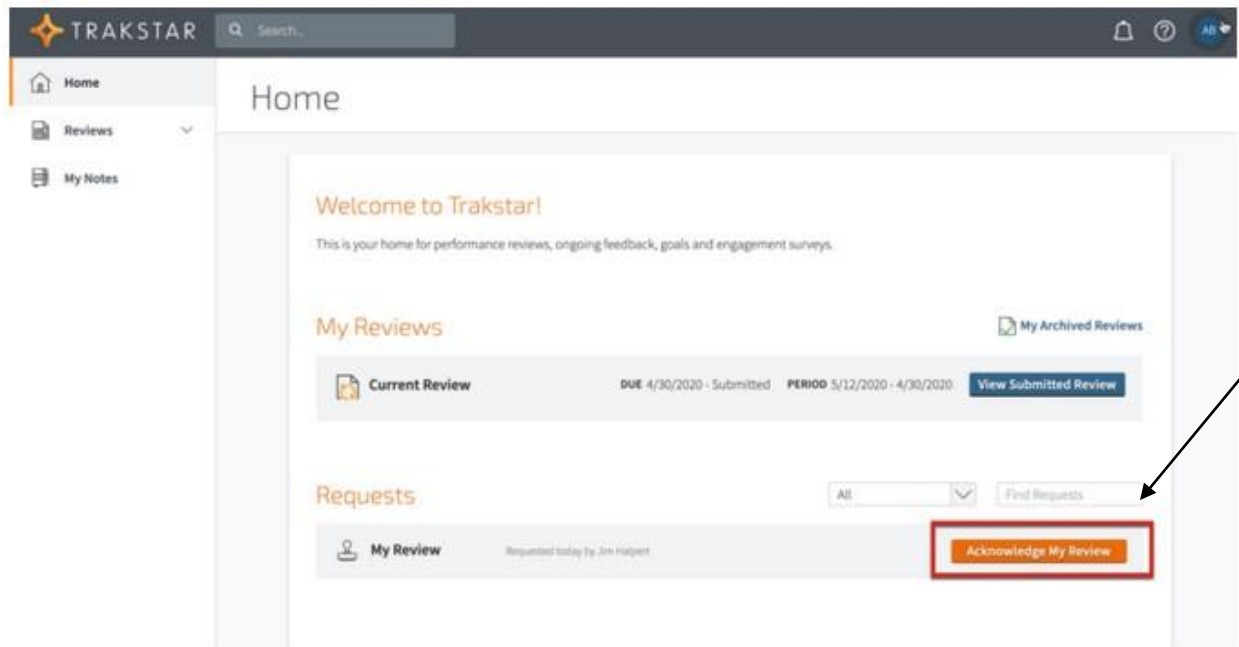
Once you have completed the self-review review, please select **Send to Manager**.

You will then be asked to once again confirm you want the review sent to your manager. Please select **Yes**. **Once submitted, you will not be able to edit your self-review.**

IV – Acknowledging the Completed Performance Review

At the end of the Performance Review Process, and after your manager has completed their portion, you will be asked to acknowledge that you have received and reviewed your performance review.

Step 1 - On your homepage, select **Acknowledge My Review**. This will route you to the review.



You can scroll through and review the ratings your manager provided, and read any notes that were added to the form. You also have the option to add Approver Comments, which can be final commentary on any of the performance elements in your review.

Once you have completed your review, select **Acknowledge**.

The screenshot shows the TRAKSTAR Annual Review interface for Andy Bernard. The interface includes a sidebar with 'Home', 'Reviews', and 'My Notes'. The main content area displays the employee's profile, review details, and a progress bar. The 'Acknowledge' button is highlighted with a red box and an arrow.

Category	Value
Competencies - Values	3.2
Initiative	4
Judgment	3
Perseverance	3
Ethics and Values	3
Compassion	3

Category	Value
Questions - Reflection	Reflect ✓
Goals	
Overall Score	3.2

Annual Review for Andy Bernard

Position Description
Position Office Manager description

Competencies - Values 50%

Initiative 20%

Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.

You will then be presented with one final place to add comments that will go to your manager. After entering any of these final comments, select **Send Acknowledgement**.

Acknowledge Review

Please comment: