

Self-Review Process and Trakstar Procedures

TSD Annual Review Process

Each TSD employee's performance is evaluated annually with respect to the ten criteria listed below. The employee's supervisor or manager is responsible for conducting the review, which consists of a written evaluation and a discussion of the evaluation with the employee.

TSD Core Values

- Communication
- Teamwork
- Initiative
- Judgement
- Customer Service
- Job Knowledge
- Work Quality
- Work Productivity
- Safety
- Attendance

The review is intended as a tool to encourage open communication between the employee and the supervisor or manager. The review is an opportunity to discuss career development potential and advancement goals with the employee. In addition, the review should provide the employee with feedback and a clearer understanding of the employee's performance compared with District standards.

The employee is provided a copy of the completed written review, which is then kept in the employee's personnel file. If the employee wishes, he/she may respond in writing to the performance review. Written responses to the review, if any, may be made to the immediate supervisor and to HR within five (5) working days after the evaluation is presented to the employee. Any written comment from the employee will be attached to the evaluation and maintained in the employee's personnel file.

Trakstar Performance Management Software

TSD utilizes the web-based Trakstar software to take notes, track goals, and conduct performance reviews on its employees. The note taking and goal tracking process occurs continuously throughout the year. The performance review process occurs annually between February and April according to the following schedule:

- February – Employee Self Review
- Feb/March – Supervisor/Manager Review of Employee
- March – HR/GM Review of Reviews
- March – Supervisor/Manager Meeting with Employee to go over Review

Employee Self-Review

As shown above, the performance review process begins with each employee completing a self-review. Although voluntary, we strongly encourage all employees to conduct a self-review. Self-reviews help ensure that employees and their supervisors and/or managers are aligned with respect to expectations and identify any gaps if they exist.

The following documentation is a guide to completing an employee self-review in Trakstar. For field workers, a printed copy will be available at each work station in the FOB break room.

SUPPORT REFERENCES AND TRAKSTAR NAVIGATION

Before we get into the details of completing a Self-Review in Trakstar, please note the link to Trakstar's support page circled in red on the next page and listed below. There are many helpful resources on this page, and you may want to bookmark it. The self-review process should be straightforward, but if you have questions, you can either visit the support page or contact HR.

<https://www.trakstar.com/support/>

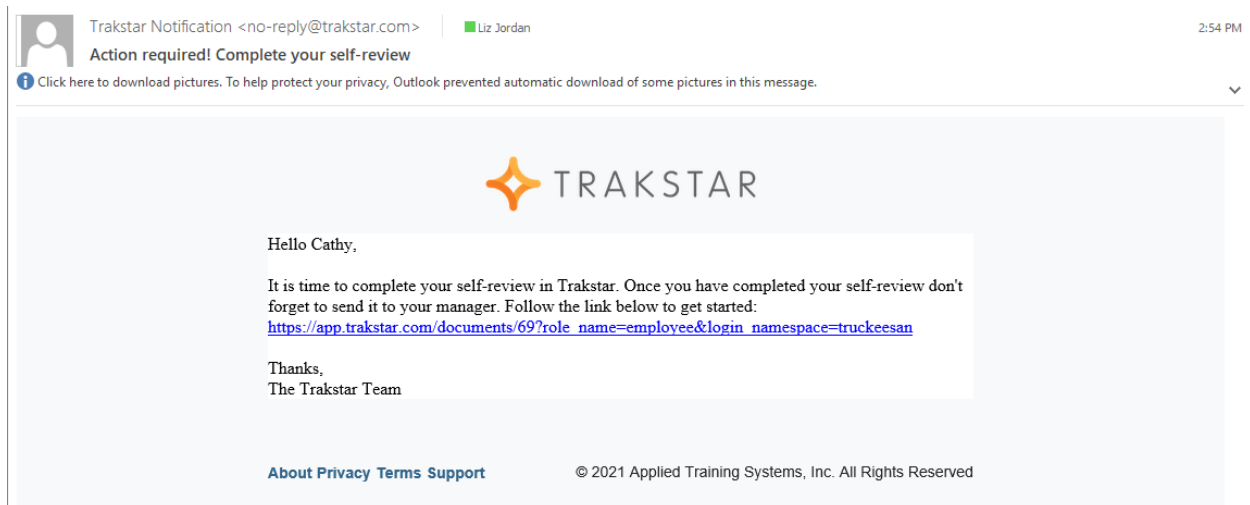
[Trakstar Article on Scoring Self-Review](#)

A couple other items to keep in mind as you're navigating Trakstar:

- Auto-save function: The Trakstar App auto-saves your changes when you're scoring your self-review. If you leave the app/website prior to completing and submitting your self-appraisal to your manager or supervisor, your changes will automatically be saved.
- If you get lost navigating the Trakstar portal, you can always look for the Home icon at the top left of each page and click on it to get you back to your home screen.





COMPLETING YOUR SELF- REVIEW

On February 1 of each year, you will receive an email from Trakstar with a link to login to Trakstar and complete your self-review (see example below). You will have 2 weeks to complete your self-review.



Once you click the link, it will take you to your Trakstar homepage as shown below.

Once you're ready, click **Score Review** as shown below.




Home


Welcome to Trakstar!


Visit the Trakstar support page to help you get started: <https://www.trakstar.com/support/>

My Reviews

 **Current Review**

DUE 1/14/2021 **PERIOD** 6/1/2020 - 3/1/2021 **Score Review**

 [My Archived Reviews](#)



Click "Score Review" to begin your self-review

Once you click **Score Review**, you will arrive on the Self-Review Form page which looks like the following:

The screenshot shows a web interface for an annual review. At the top, there's a navigation bar with a search bar and user icons. Below this, the header section includes the employee's name 'Eddie z Employee', their manager 'Mary z Manager', and the review title 'Annual Review'. It also shows 'Your Scoring' as '0% Complete' and a 'More ...' button. The main content area is divided into three tabs: 'Goals and Notes' (2 Goals), 'Scoring' (Due 1/14/2021), and 'Future' (Set Future Goals). The 'Scoring' tab is active. On the left, a sidebar lists 'Core Values' (Communication, Teamwork, Initiative, Judgment, Customer Service, Job Knowledge, Work Quality, Work Quantity & Productivity, Safety, Attendance) and 'Goals' (Attend conference, Implement a new tracking system for Q2). The main area displays the 'Annual Review for Eddie z Employee' with a 'Position Description' section. Below this, it shows '12 Unscored Elements' and '0 Unanswered Questions' with a 'Send to Manager' button. The 'Core Values' section shows a score of '100%' for Communication. The 'Communication' section has a definition and a rating scale from 'Exceptional' to 'Not Effective'. At the bottom, there's a 'Comments (0)' section with a text input field labeled 'Add a comment...'. A red arrow points to this input field.

SCORING

Each employee will be scoring themselves on the 10 Core Values listed above on the left hand side. To score each core value, you can either click on the core value you wish to score from the listing on the left-hand side, or you can scroll through the core values using the scroll bar on the right hand side.

Each of the core values has a definition directly beneath it. For each of the core values, you will score yourself by clicking on one of the five categories listed under each core value, starting with **Exceptional**

on the left and continuing over to **Not Effective** on the right. Once you click on a rating, your selection will turn dark blue, and a description of the rating specific to that core value will populate below it.

Comments should be provided to support any scores other than “Effective”. Comments should be as specific as possible, ideally providing actual examples of how your performance demonstrated that rating. Please note that a rating of “Effective” is perfectly acceptable.

ADDING COMMENTS

If you would like to add a comment to support your rating, click in the **Add a comment** text box. See red arrow below.

Core Values

100%

Communication

10%

Communication refers to the ability to inform orally and in writing, with clarity and good effect. It means to understand clearly and quickly when instructions or orders are received. It means judgment about what information is important and what is not, and what should be communicated, how, to whom and when.

Exceptional	Highly Effective	Effective	Minimally Effective	Not Effective
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Comments (0)

Add a comment...

Once you enter your comment, you can attach a file by clicking the **Attach a file** icon below the comment text box as described below. If you do not wish to attach a file, you'll simply click on the **Add this comment** icon.

Communication

10%

Communication refers to the ability to inform orally and in writing, with clarity and good effect. It means to understand clearly and quickly when instructions or orders are received. It means judgment about what information is important and what is not, and what should be communicated, how, to whom and when.

Exceptional	Highly Effective	Effective	Minimally Effective	Not Effective
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Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner. Oral and written communications are highly acceptable, being both comprehensible and appropriate. Involves the right people in discussion when issues arise.

The screenshot shows a comment interface for a user named 'Eddie z Employee'. At the top, there is a 'Comments (0)' header with an upward arrow icon. Below this is a light blue comment box. Inside the box, on the left, is a circular profile picture of a dog and the name 'Eddie z Employee'. To the right of the name is a text input area. Above the input area is a toolbar with six buttons: 'B Bold', 'I Italics', 'U Underline', 'Bullets', 'Numbers', and 'Link'. The input area contains the text: 'I consistently communicate with my manager and co-workers around the the restocking of the treat jar.' Below the input area are three buttons: 'Cancel', 'Attach a file', and 'Add this comment'. Two red arrows point upwards from below the 'Attach a file' and 'Add this comment' buttons.

ATTACHING A FILE TO A COMMENT

Clicking **Attach a file** will allow you to add any files you wish to attach to your comment, e.g. a certificate of completion that you are referencing in a note under Initiative. This is not required, simply an option.

Once you have entered your comment, click **Add this comment**.

COPYING EXISTING NOTES


Any Notes that you, a manager, or a supervisor entered in Trakstar during the annual review period and categorized by core value, will appear under the core value as shown below. You'll see **Notes (1)** with a dropdown arrow below.

Initiative

10%

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

Exceptional	Highly Effective	Effective	Minimally Effective	Not Effective
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⌵ **Notes (1)**

⌶ **Comments (0)**

Add a comment...

If you click on the dropdown arrow next to **Notes**, it will display all notes taken under that core value during the review period. If you would like to copy the note as a comment to your review, click **Copy to Comment** on the far right section of the note you would like to copy.

⌶ **Notes (1)**



Mark Wasley

Created 17 days ago

[Copy to Comment](#)



Eddie has worked diligently to improve his times on the agility obstacle course. Most notably, his innovative two step at a time approach to the the ladder seems to have caught the attention of his competitors. Good luck catching Eddie if he gets a lead.

GOALS

Once you have scored yourself for the remaining core values, adding comments and attaching files as desired, you will complete the Goals section of the review. These are the goals that you and your manager/supervisor set during last year's annual review process. You will select a completion score. Adding a comment is optional.

Attend conference added by Mary z Manager

☐ N/A

Goal Met Above Expectations	Goal Met	Goal Partially Met	Goal Not Started
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Goal Met

⬆

Comments (0)


Add a comment...

SUMMARY COMMENTS (OPTIONAL)

This is your opportunity to add any additional comments on your performance over the last year that you haven't yet mentioned in your self-review.

REVIEW AND SEND TO MANAGER

Once you have scored each of the core values and goals, please take a moment to review your self-review. Once you are satisfied that your self-review is complete, scroll back up to the top of the form. The **Send to Manager** Icon on the right should now be dark blue, as opposed to grayed out. If it's still grayed out, then you still need to complete your scoring. Look at the summary column on the left to see which item(s) have not been scored. When you are ready to submit your review to your manager, click on the **Send to Manager** Icon.



Employee
Eddie z Employee
Manager Mary z Manager

Review
Annual Review
Position Master Evaluation Form
Process Annual

Your Scoring
3.6
[More ...](#)

Goals and Notes
2 Goals

Scoring
 Due 1/14/2021

Future
Set Future Goals

Scoring Complete

Core Values **3.6**

Communication	4
Teamwork	5
Initiative	3
Judgment	3
Customer Service	3
Job Knowledge	3
Work Quality	4
Work Quantity & Productivity	3
Safety	4
Attendance	4

Goals **3.33**

Attend conference	GM
Implement a new tracking system f...	GM

Summary Comments -

Overall Score **3.6**

Annual Review for Eddie z Employee
Position Description
.

0 Unscored Elements
0 Unanswered Questions

[Send to Manager](#)

Core Values **100%**

Communication **10%**

Communication refers to the ability to inform orally and in writing, with clarity and good effect. It means to understand clearly and quickly when instructions or orders are received. It means judgment about what information is important and what is not, and what should be communicated, how, to whom and when.

Exceptional	Highly Effective	Effective	Minimally Effective	Not Effective
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Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner. Oral and written communications are highly acceptable, being both

Congrats! You've completed your Self-Review.

NEXT STEPS:

In the coming weeks, your manager/supervisor will be preparing your review. Once your review is complete, your manager/supervisor will be meeting with you to discuss your performance review just as we did prior to using the Trakstar software. Our goal is to complete all reviews by 3/31.