IANR Performance Management

Perform System User Guide

Overview: The IANR Performance Management process is for all regular staff employees within IANR and their managers, including faculty who manage staff.

Employee and managers will meet twice per year to discuss six open-ended questions intended to focus on employee accomplishments, goal, and opportunities for growth and development.

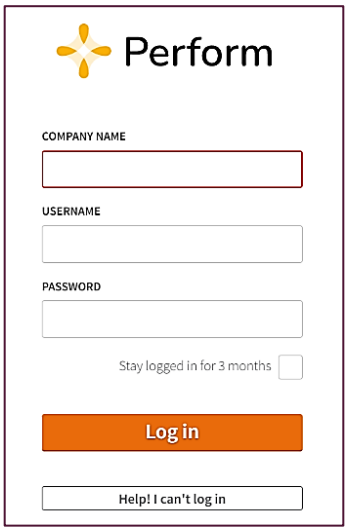
Perform System Instructions:

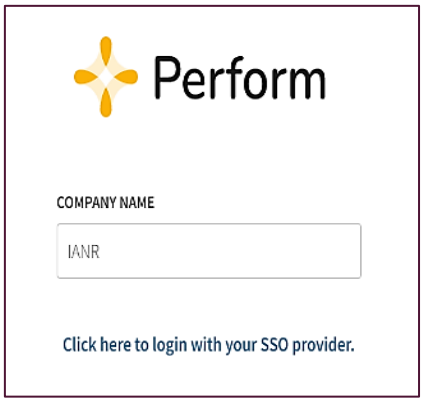
1. As a new employee, once you are entered into the Perform system you will receive a welcome email. Once you receive this email you will be able to log in. You will also receive reminder emails from the system when you need to log in and perform tasks throughout the performance management cycle.

2. To Log into Perform go to: perform.trakstar.com/login

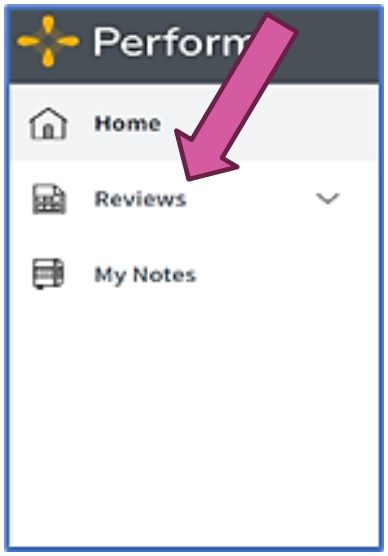
   Type IANR into "Company Name."

   Log in with your UNL credentials. Once in the system, future logins may only require your UNL credentials through TrueYou.





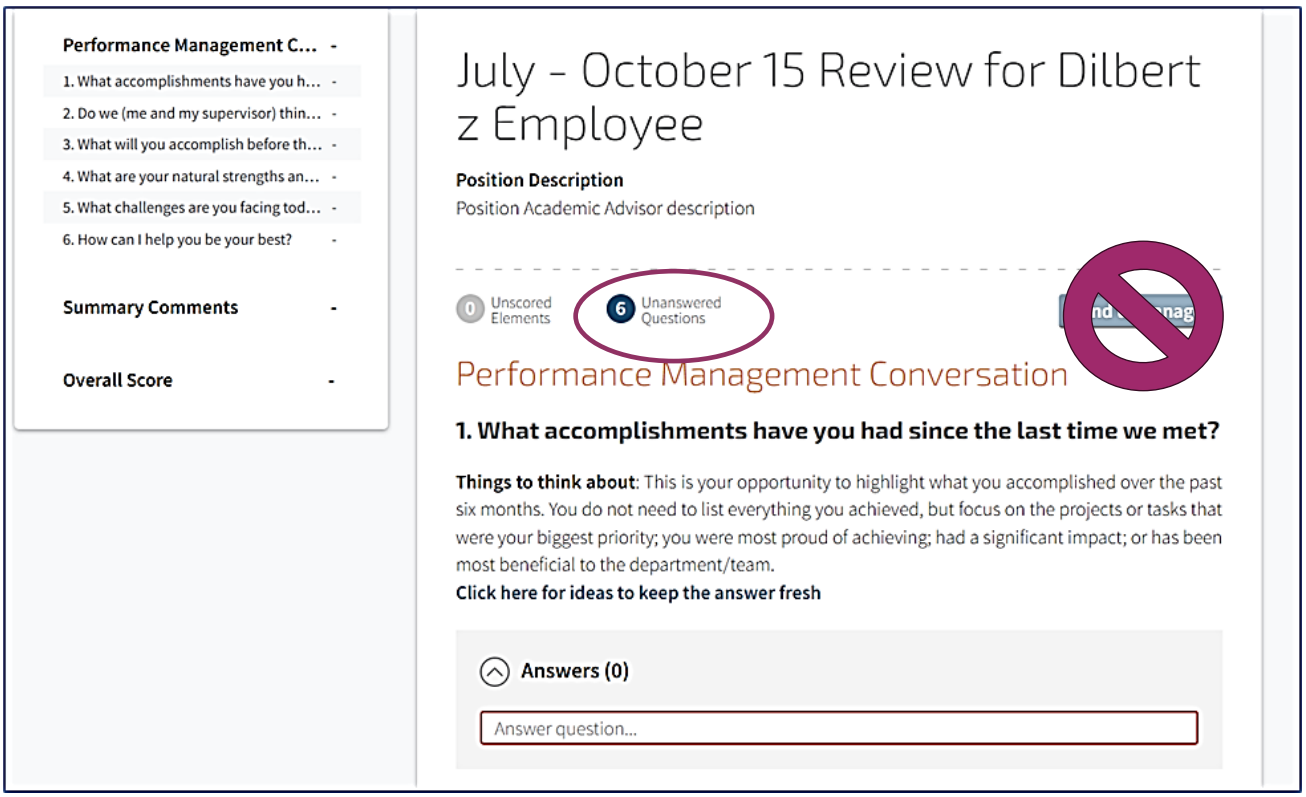
3. Locate the navigational bar on the left side of the screen, and click on "Reviews."



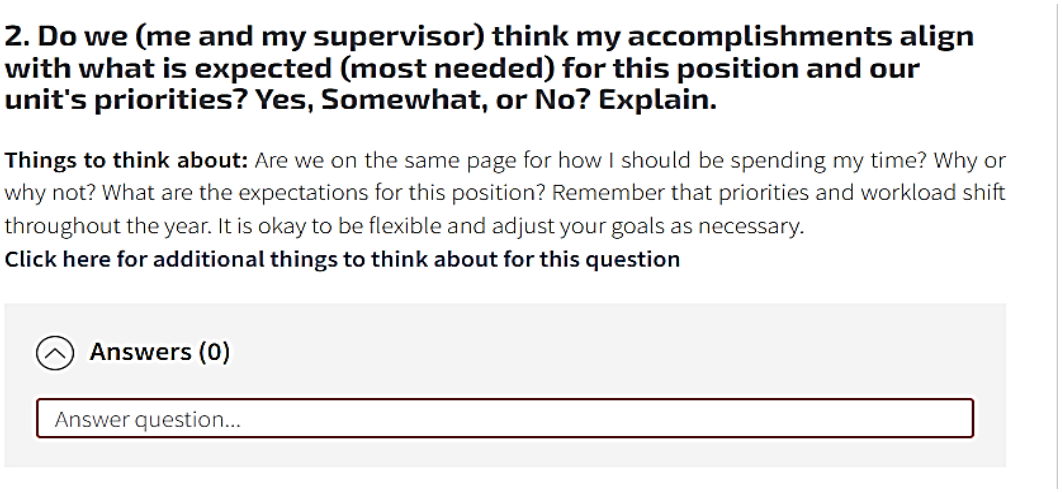
4. The "Reviews" screen will display a status bar along the top. This will tell you the review cycle, due date, and the percent of completion for your conversation

5. The Performance Management process is EMPLOYEE-driven. Schedule a time to have a conversation with your manager. Prepare for the meeting by completing the answers to your 6 questions. You can navigate to various questions by scrolling down on the right or clicking on the questions on the left-hand navigation menu. The "unanswered questions" icon will also indicate your completion status.

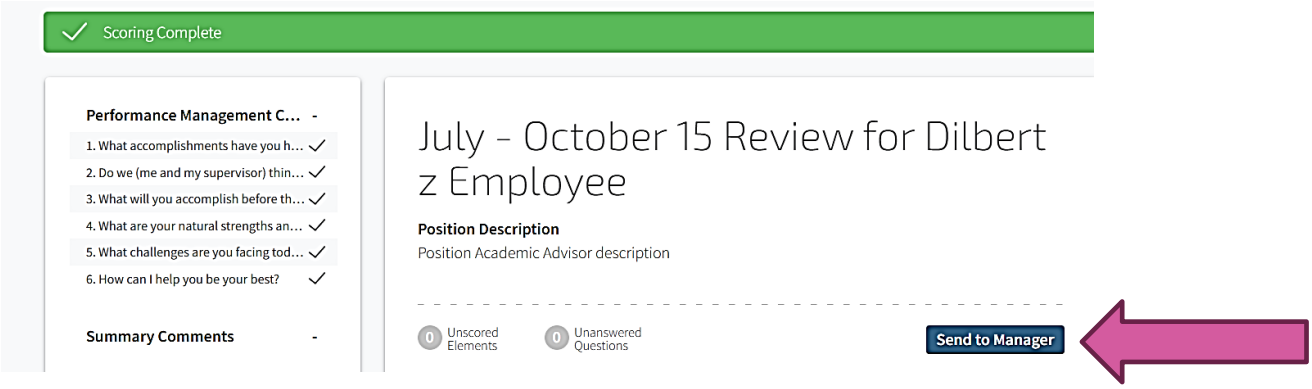
DO NOT send to your manager prior to the conversation.

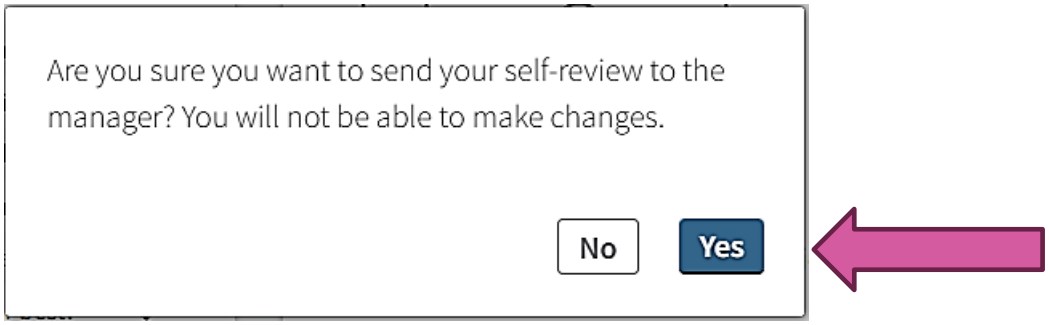


6. AFTER the conversation with your manager, summarize the conversation by adding anything new that was discussed to each of your answers. Be sure you list the manager's response to question #2 by indicating **"YES, SOMEWHAT, or NO"** to reflect whether or not you are meeting expectations.

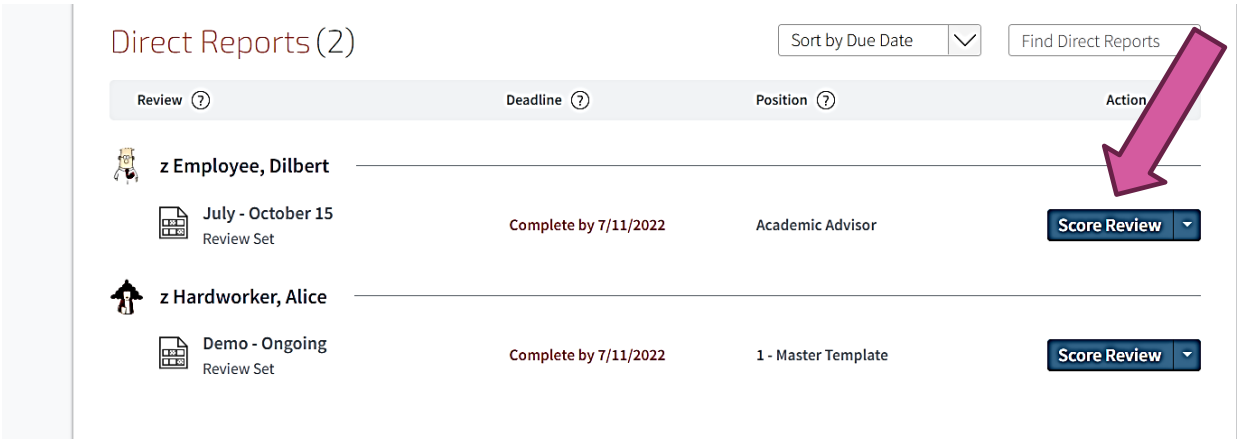


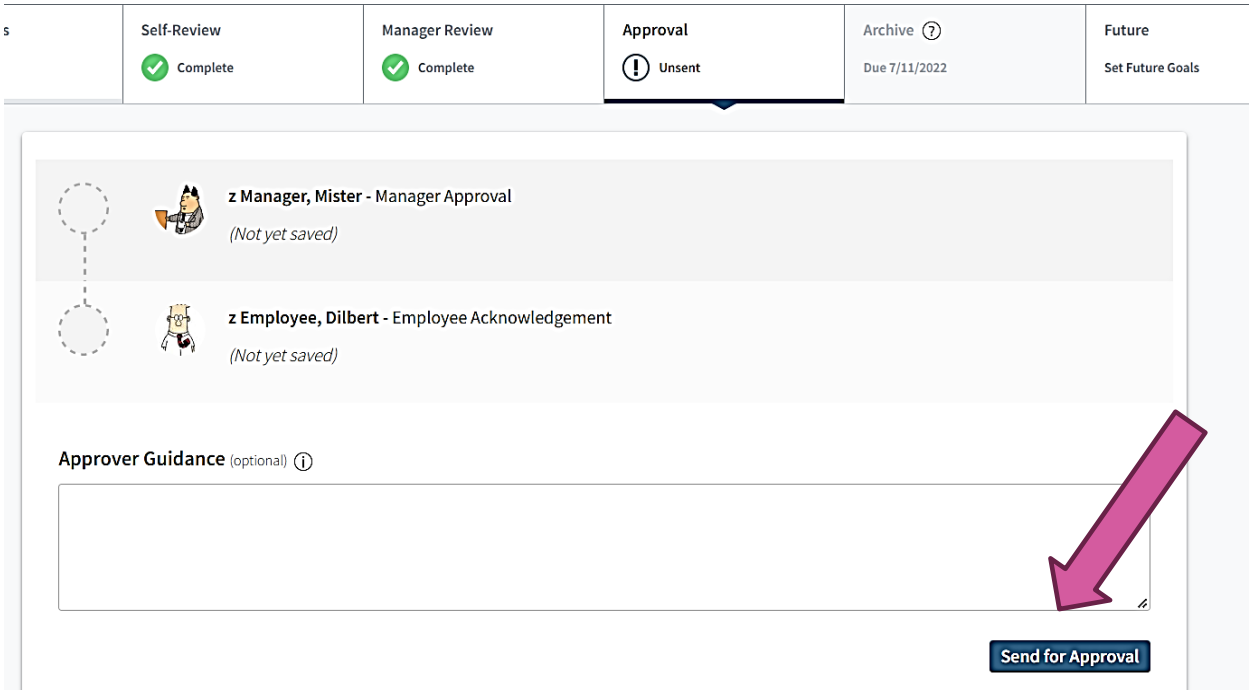
7. Once you feel you have summarized the entire conversation, click on the "send to manager" button.



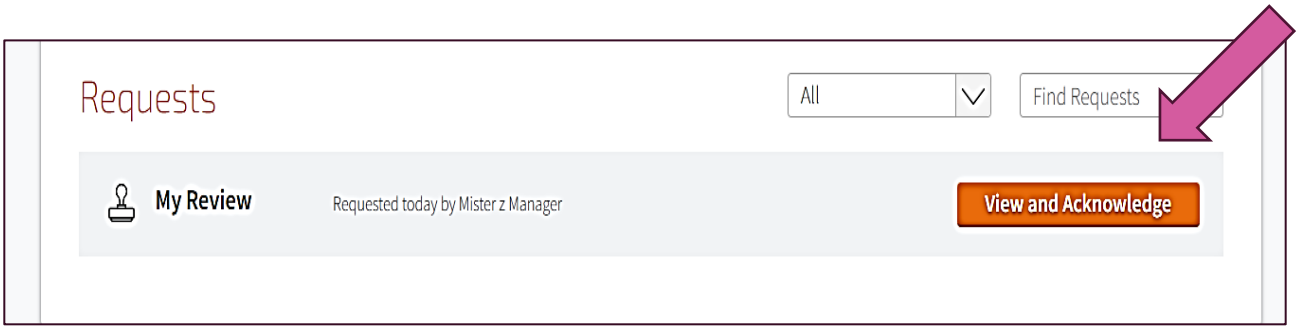


8. Now it is the manager's turn. The manager can find their direct reports on their home page by scrolling down toward the bottom. The manager will select the employee they would like to review and click on "score review". The manager will then add comments to each question and send back to employee by clicking "approval" several times as prompted.

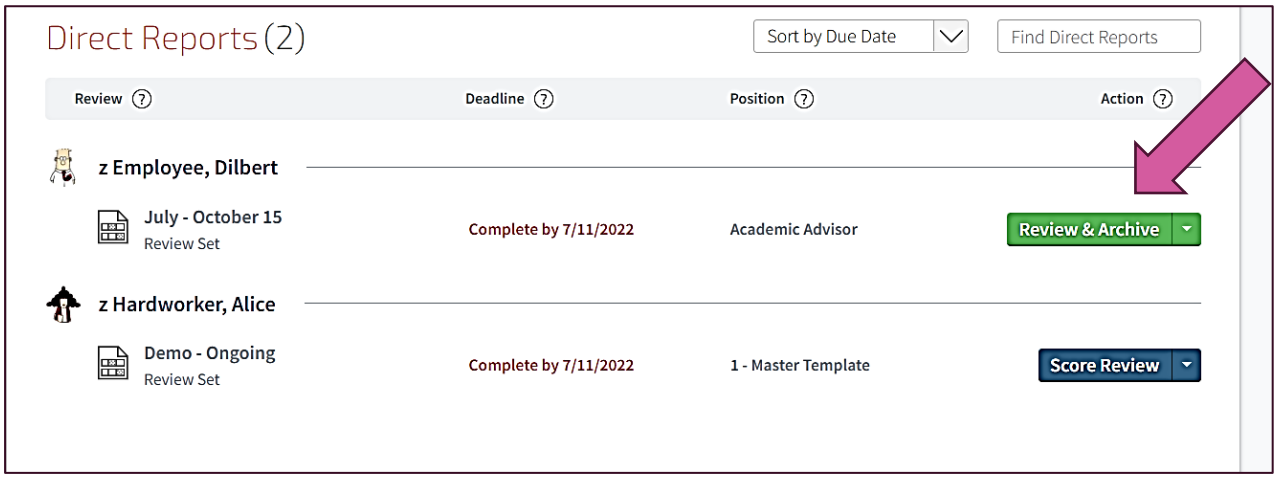


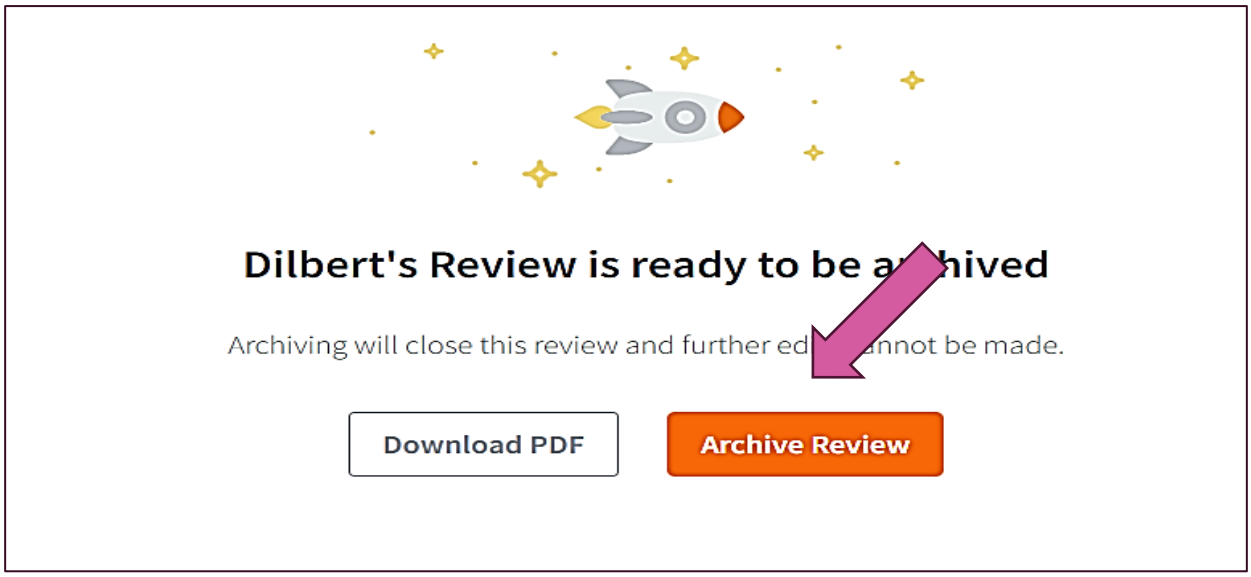


9. You will then receive an email to log into the Trakstar system to acknowledge the conversation. Log in and click on the "acknowledge" buttons as prompted.



10. The Manager can now archive the conversation, or work with the system administrator for archiving.



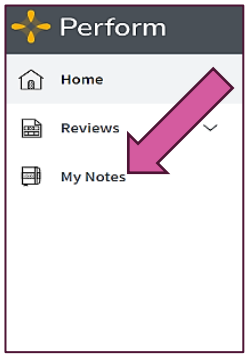


The performance conversation process is now completed.

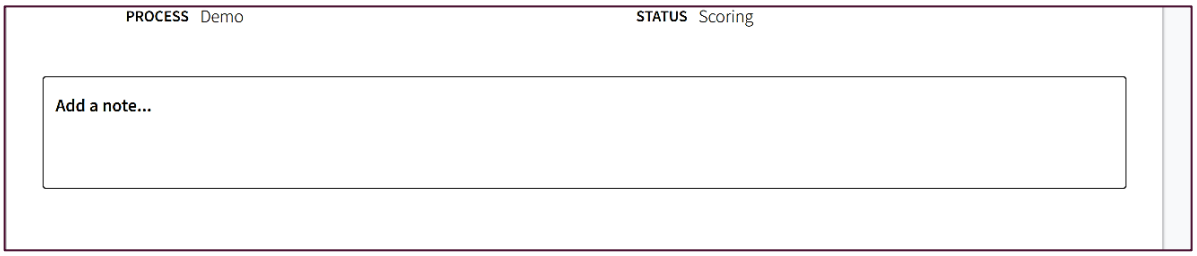
Creating Notes in the Perform System: Employees and managers may use the "notes" option in Perform to store information and details they want to remember for the performance conversation.

Instructions:

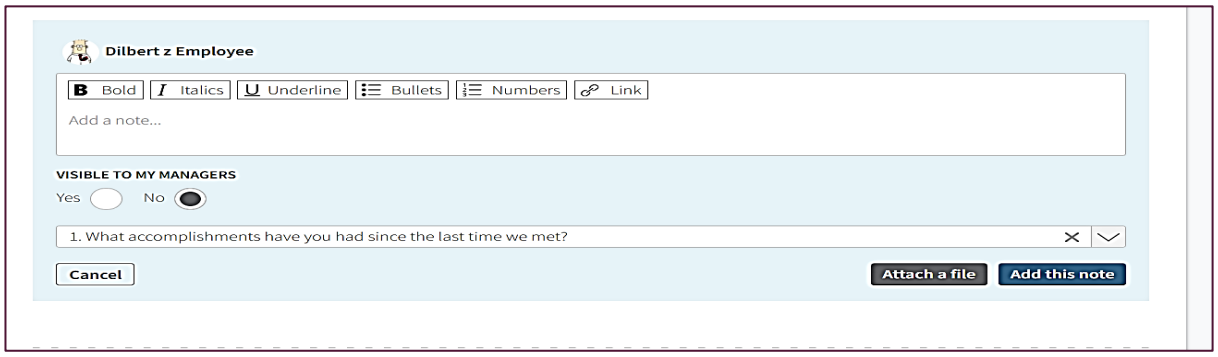
1. Once logged in, click on the "My Notes" icon on the left-hand navigational menu.



2. Click inside the box to begin adding a note.



3. You can add a note in this section and decide if you want to make it visible to your manager. You can designate which question the "note" should tie to so you can decide later if you want to use it to complete your evaluation questions later. You can also attach a file as a "note." You may want to use this to upload a certificate of completion, a positive email from a customer or faculty member, or anything that you decide is useful in supporting an answer to the evaluation question. Once you take a note, you can edit it or delete it later.



Questions? Additional Resources? www.ianrhr.unl.edu/performance-management

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