NTAS/SLAS End-of-Year Conference Quick Reference Guide

HISD Talent Development & Performance
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Target Audience	Purpose
Appraisers and employees completing the End-of-Year Form in the OneSourceMe System	This quick reference guide is a resource to support appraisers and employees through the End-of-Year Conference process.

Getting Started	Appraisal Exceptions
To access the End-of-Year appraisal document, log into OneSourceMe. From the home page, select **Performance**. Selecting **All Forms** will display all assigned employee documents. Click the blue link under **Form Title** to display the current year's appraisal document for the desired employee. https://onesource.houstonisd.org/irj/portal	If the appraisal cannot be completed, scroll down near the bottom of the appraisal document and select the reason from the drop-down box. *Do not* enter ratings. When done click **Save and Close** at the bottom of the document. Save and Close

Appraiser Actions

This section describes appraiser actions that must occur before the document is submitted to the employee.

Entering Ratings for Department Goals	Entering Ratings for Competencies/ Standards
To rate Department Goals, click the dropdown for each goal and select a rating. Department Goals (30.0%) **Expand All** will allow the appraiser to view goal details, self-assessment information (if available), and add comments if desired.	To rate Competencies/Standards, click the dropdown for each Competency/Standard and select a rating. Competencies (70.0%) Standards (70.0%) **Expand All** will allow the appraiser to view self-assessment information (if available) and add comments if desired.

Individual Proffesional Development Plan	Year End Comments
In the Individual Professional Development Plan (IPDP) section, click **Expand All** to enter comments (optional).	In the Year End Comments section, the appraiser can add comments (optional).

Uploading Documents	Submitting Ratings to the Employee
Before submitting the EOY ratings, the appraiser can upload documentation to the appraisal document by clicking on the paperclip icon in the **Supporting** box in the upper right side of the document, then click on the plus sign. Browse for files and click **Upload**. When the file has been successfully uploaded, click **OK** to complete. The attachment can be retrieved by clicking on the paperclip icon. ■ 0 ⌗ 0 Supporting Supporting ✕ Jump to: Attachments(0) **Attachments** +	After entering all ratings, the appraiser will submit the ratings to the employee by clicking the **Submit Ratings for End of Year Appraisal** button. Submit Ratings for End of Year Appraisal On the confirmation screen click **Submit Ratings for End of Year Appraisal** a second time. The employee will receive an email notification overnight informing them that the appraisal is ready for review*. *Note: the appraiser should schedule the EOY Conference 5 working days after the employee has received the document.*

Employee Actions
This section describes appraiser actions that must occur before the document is submitted to the employee.

Employee Review
The employee has 5 working days to review the document prior to submitting it back to the appraiser in anticipation of the End-of-Year Conference. The employee shall review the End-of-Year Appraisal by logging into OneSourceMe and selecting the E**nd-of-Year Review** link in the **To Do Tile**. Once the Employee Review is complete, the employee shall click the **Employee Review Complete** button at the bottom of the document. On the confirmation screen, click the **Employee Review Complete** button a second time. This submits the document back to the appraiser for the Appraiser's Signature.

Signatures	
The final step in the process is for the appraiser and employee to sign the document following the conference.	
Appraiser Signature	**Employee Signature**
From the OneSourceMe Home Page, select: Home, Performance, All Forms. Choose the current HISD Performance Document for the employee. The appraiser will enter the date of the EOY Conference in the **Manager Comments** field at the bottom of the appraisal form in the **Signature** section. The manager may also write additional comments here as well. At the bottom right corner of the page the appraiser must click the **Appraiser Signature** button. On the confirmation screen, click the **Appraiser Signature** button again to electronically sign and send the form to the employee**.	From the OneSourceMe Home Page, select **To Do** in the Performance Tile on the Home Page. The employee may enter comments in the Employee Comments section at the bottom of the document. At the bottom of the page the employee must click the **Employee Signature** button. On the confirmation screen, click the **Employee Signature** button again to electronically sign and finalize the appraisal document.

Additional Supports
For help with the process, contact your appraiser or Performance and Continuous Improvement Manager. You can also visit the Talent Development and Performance SharePoint site or email LTD_AppraisalSystems@houstonisd.org.

*System-generated emails go to the "Other" inbox in Outlook. As a best practice, the appraiser should also notify the employee that the document is ready for review.

The employee is the last person to sign the document. To safeguard the validity of the document, it is the **appraiser's responsibility to ensure that the document is signed by the employee.

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