

Automated Forms User Guide



1. Visit [COGNet](#)>Human Resources>Performance Management for forms and additional resources.

Performance Evaluation Forms are available on-line and can be accessed via any platform with internet access.

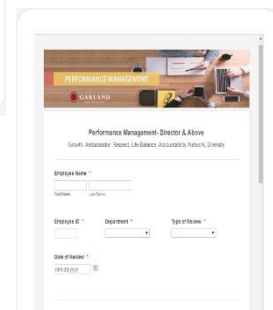
- ✓ Desktop
- ✓ Laptop
- ✓ Tablet
- ✓ Phone



Desktop/Laptop



Phone/Tablet



2. Select the **desired form** based on the employee's role in the organization

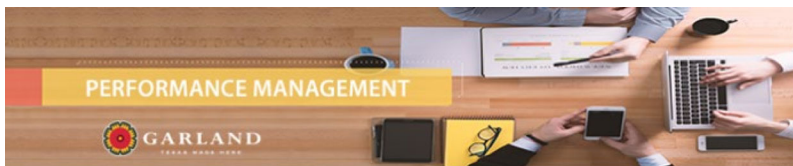
Performance Review Forms

- Performance Management - Instructions
- Performance Management - Non-Exempt
- Performance Management - Exempt
- Performance Management - Supervisor/Manager
- Performance Management - Director & Above

Eligible Employees

To assist you, a list of **Eligible Employees by Managing Director** is provided on COGNet including employee ID numbers, required forms and review due dates.

3. Complete each section of the form for the employee being reviewed.



Employee Name *

First Name Last Name

Enter the employee's first and last name

Enter the employee's ID

Employee ID *

See Step 2 for instructions on accessing employee ID numbers

Department *

Select the employee's department from the drop-down list

Date of Review *

Date you are completing the form **or** date you will discuss the review with your employee

Important

You may complete the form...

- After receiving feedback from the employee
- Prior to providing feedback to the employee
- A combination of the two

Remember, you can edit the form as many times as needed prior to final completion.

4. Next, select the **type of review** and enter the **e-mail address of the reviewer** or person that you would like the review sent to.

Type of Review *

Appraiser Email Address *

Person completing or reviewing this form

Select the type of review from the drop-down list.

- Annual
- Probationary (6 months from hire)
- Promotional (6 months from promotion)
- Performance Improvement

Note: The address listed in this field will receive an electronic, **editable** copy of the completed form after submission. Unless otherwise directed by your manager, this should be the e-mail of **the person completing the form.**

5. Complete the **rating and justification sections** for each of the performance criteria.

Models Organizational Values *
 Exceeds Requirements Meets Requirements Does Not Meet Requirements

Select the performance rating

Feedback - Models Organizational Values *

Enter supporting justification for the rating.

Immediate Supervisor Signature

Department Director Signature

Employee Comments/Feedback (optional):

Employee Acknowledgment of Receipt/Discussion

Note: This section is provided for signatures during face-to-face employee meetings.

Preview Answers

Select **Preview Answers** to move to final submission.

6. After review, select “Back” to make additional edits or “Submit” to complete the evaluation. You may make additional edits as needed after submission.

Select **Submit** to move to final submission.



Important

Following submission, the “Appraiser E-mail Address” provided will receive an **editable** copy of the evaluation.

7. The following message confirms your submission.



Thank You!

Your submission has been received.
To Print form, please click the link below
[Download Submission PDF](#)

Click here to download a **pdf of the evaluation** that can be saved for employee discussion & signature.

Note: If you **do not** receive this notice, confirm that **pop-up blockers** are disabled in your internet browser.

8. Upon successful submission, the “Appraiser E-mail Address” provided in the form will receive an **editable** copy of the evaluation. The editable link can be used...

- to make additional edits to the form, or
- to forward the form for review/edit as needed (i.e. Director or Managing Director review)

The e-mail subject line will note the employee’s ID, Name and Type of Review



Update Submitted Form: [Edit Submission](#)

Note: Utilize the **Edit Submission** link to make changes to the form as needed

Performance Management- Non-Exempt	
Employee Name	Jane Doe
Employee ID	11102018
Department	Human Resources
Date of Review	11-10-2018
Type of Review	Annual

FREQUENTLY ASKED QUESTIONS

Can I start the form and come back later?

- To make future edits in the form, you must “**Preview Answers**” and “**Submit**”.
- Following, you will receive an e-mail with an editable link which will allow you to edit the form as many times as needed during the Performance Review cycle.
- See steps 6-8 for instructions

Can I save the form to my computer?

- Yes. You may save a .pdf of the form to your computer by following the steps 6-7.

I submitted the form but did not receive a confirmation e-mail.

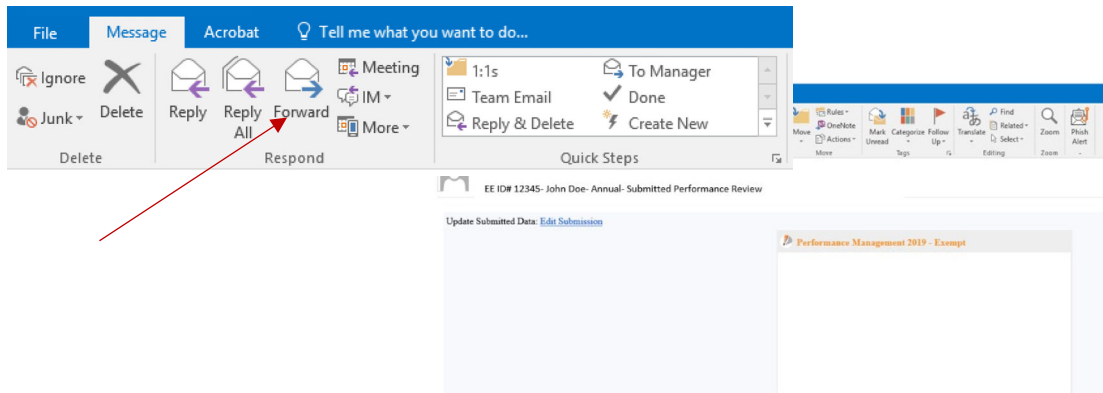
- Contact GarlandHR@GarlandTX.gov for assistance or Human Resources at ext. 2475.
- Be sure to check your inbox or spam folder for emails from GarlandHR

Can I copy and paste information into the forms?

Yes. You can copy comments directly from Word or Google Sheets.

My manager wants to review my forms. How do I submit the form to someone else?

- Following submission, you will receive an e-mail with an editable link to the form.
 - Via Outlook, forward the e-mail to as many approvers as needed within your department.
 - Anyone with the editable link can make updates to the form.



ADDITIONAL SUPPORT

For technical support or general questions regarding the performance management process, contact Human Resources at GarlandHR@GarlandTX.gov or ext. 2475.