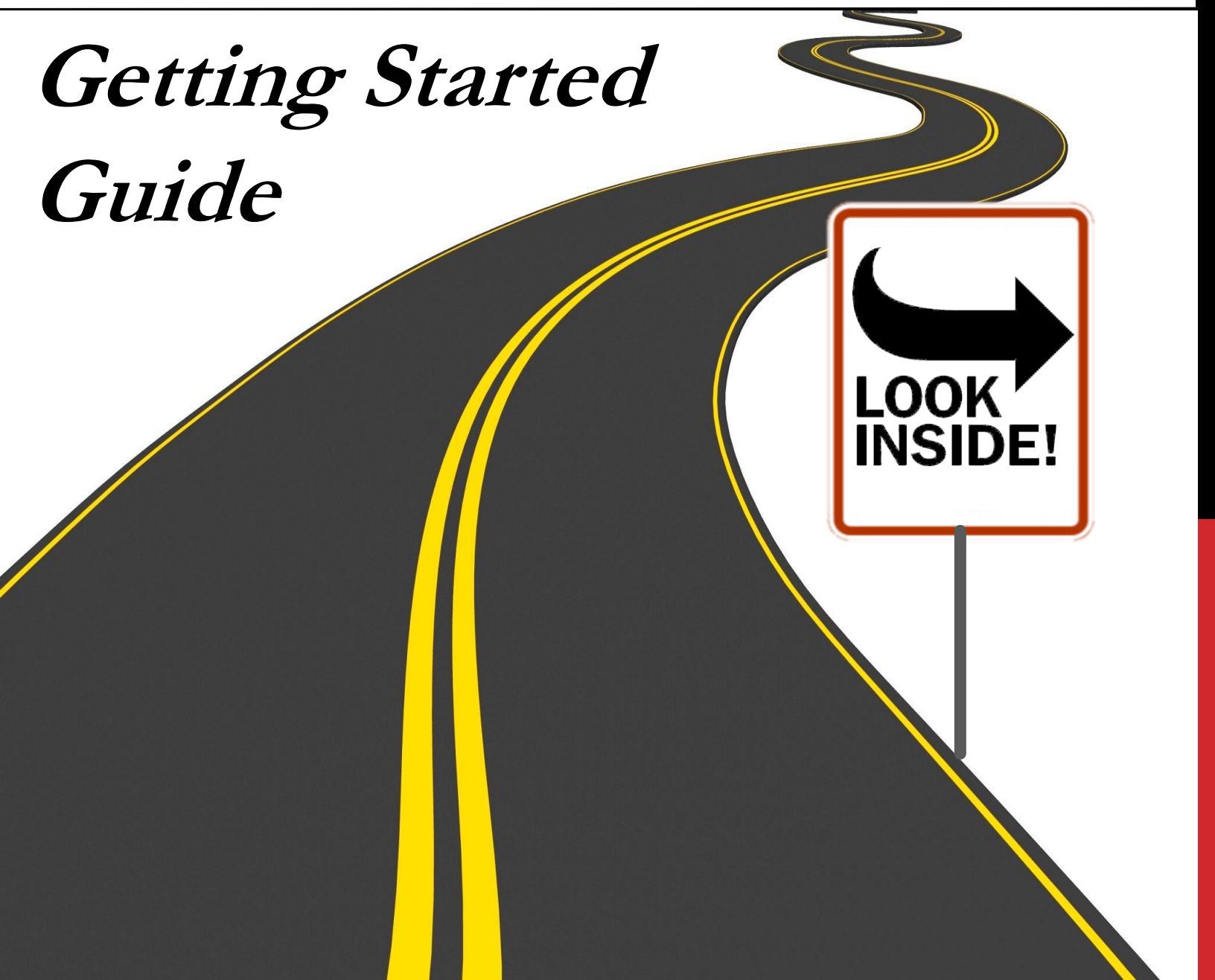
July 2015 ISSUE 2

Talent
Integrating people, processes and technology

HEAR
HOUSTON EMPLOYEE ASSESSMENT AND REVIEW

Getting Started Guide




Step
1

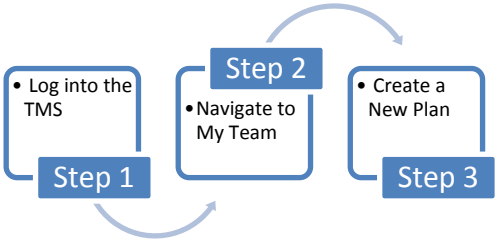
Create a HEAR Plan

ROLE: MANAGER

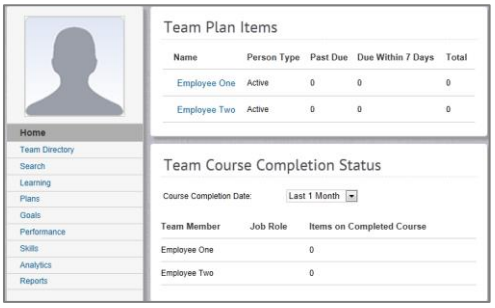
Purpose

This job aid is to guide managers through the step-by-step process of how to create a new plan.

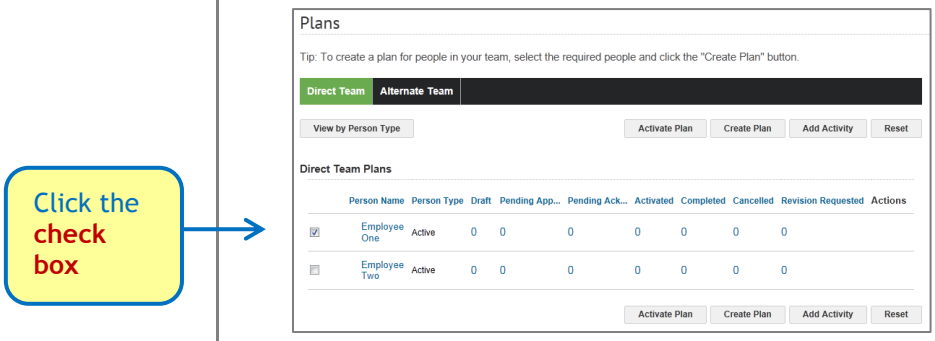
Process Flow



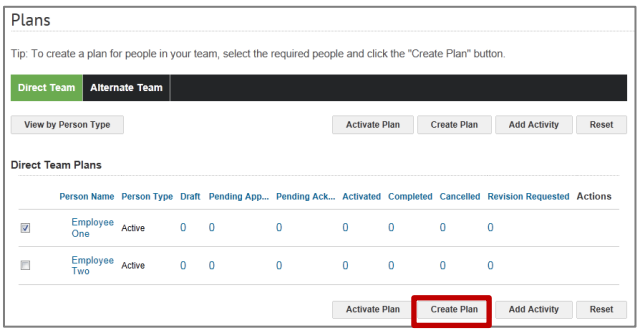
Procedure

Step	Action
1. Log into the Talent Management System (TMS) 1. Type your **Username** and **Password** 2. Click **Sign In**	• From any brower, type in https://talent.houstontx.gov.  • The Talent Management System log in screen displays. Type in your **Username** and **Password** then click **Sign In**.  • The homepage displays.
2. Navigate to My Team Click **Plans**	• Click the **My Team** icon in the top main header. The Team Dashboard page displays.  • In the left navigation pane, click **Plans**. The **Plans** page displays. 

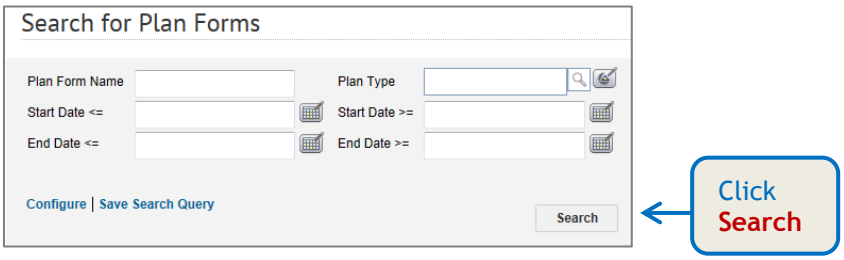
Step	Action
3. Create a New Plan	• In the **Direct Team Plans** section, click the **check box** to the left of the employee's name.



	• Click the **Create Plan** button.

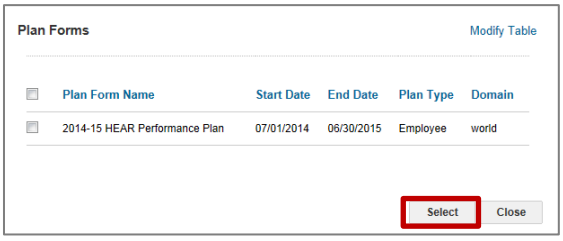


	• The **Search for Plan Forms** dialog box displays. Click the **Search** button.



	• All available **Plan Forms** display. Click the **check box** to the left of the Plan Form Name then click the **Select** button.

**If the employee has direct reports, select the Supervisor/Manager plan; otherwise select the Employee plan.*



	• The confirmation message displays once the plan has been successfully added.

END OF PROCEDURE • RETURN TO TOP


Step
2

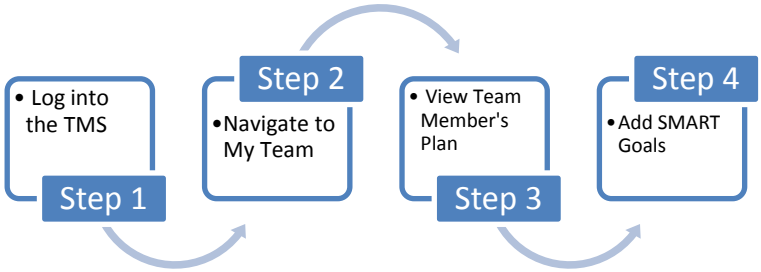
Add SMART Goal to Plan

ROLE: MANAGER

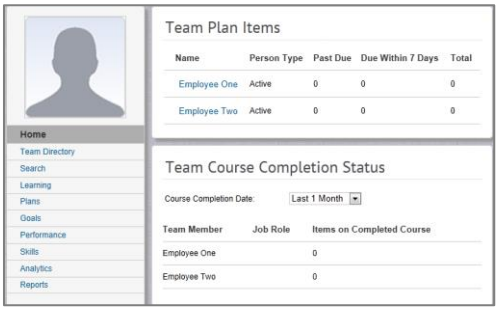
Purpose

This job aid is to guide managers through the step-by-step process of how to add SMART Goals to a plan.

Process Flow

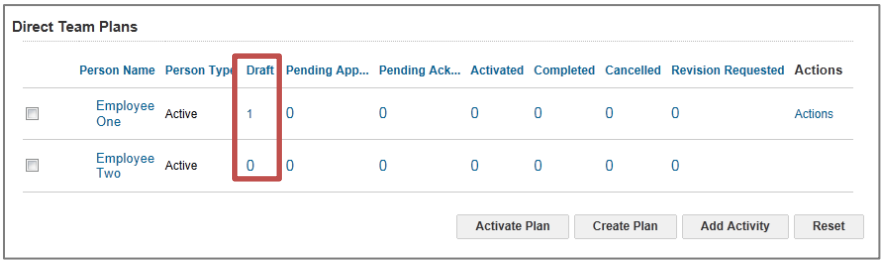


Procedure

Step	Action
1. Log into the Talent Management System (TMS) 1. Type your **Username** and **Password** 2. Click **Sign In**	• From any brower, type in https://talent.houstontx.gov.  • The Talent Management System log in screen displays. Type in your **Username** and **Password** then click **Sign In**.  • The homepage displays.
2. Navigate to My Team Click **Plans**	• Click the **My Team** icon in the top main header. The Team Dashboard page displays.  • In the left navigation pane, click **Plans**. The **Plans** page displays. 

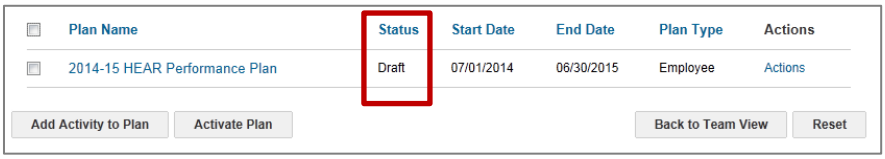
Step	Action
3. View Team Member's Plan	• In the **Direct Team Plans**, under the **Draft** column, click on the number **1** link next to the desired employee.

Click the number **1** link

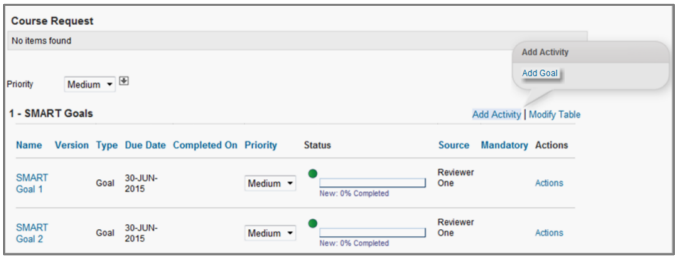


- Under the **Plan Name** column, click the **Plan Name** that is in **Draft** status to view the plan details.

Click **Plan Name**



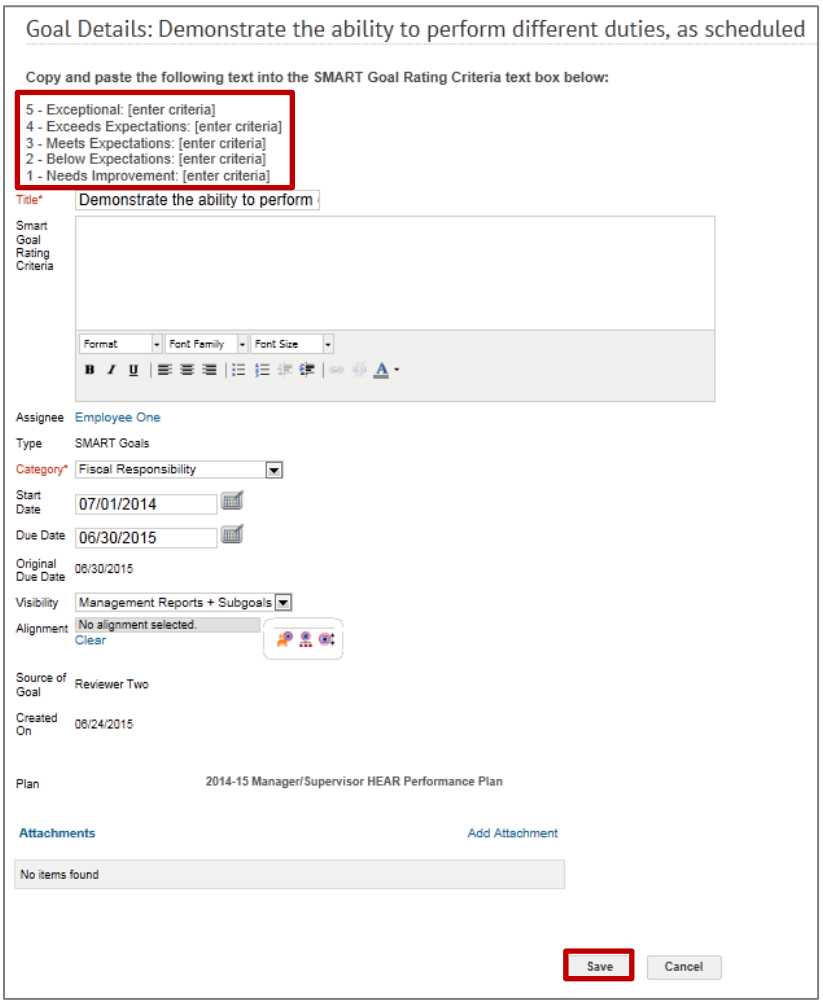
4. Add SMART Goals	• **The Plan Details** page displays. • In the **1-SMART Goals** section, click **Add Activity** then **Add Goal**.



Click **Add Activity** > **Add Goal**

- The **Create Goal** window displays.
- Enter the **Title** of the SMART goal in the **Title** field, select the goal **Category that aligns with the Mayor's Pillar** then choose the **Start Date** and **Due Date**.
- Next, click the **Add Detail** button to advance to the next screen.



Step	Action
	• The **Goal Details** page displays. • **Copy** the SMART **Goal Rating Criteria, located at the top of the page,** then **Paste** it in the text box below. • Enter rating criteria between the **[enter criteria]** brackets for each rating. • **Click the Save button.**  • The **Activity to Plan** confirmation page displays. This confirms that your goal has been successfully added. Click the **Close** button to close the confirmation page. • The **Create Goal** page displays, you can choose to add another goal or click the **Close** button to return to the plan.

END OF PROCEDURE • RETURN TO TOP


Step
3

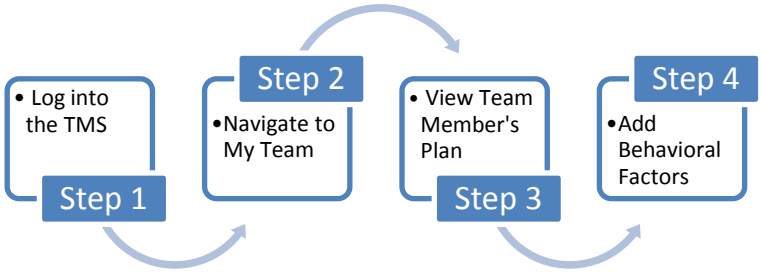
Add Behavioral Factors to Plan

ROLE: MANAGER

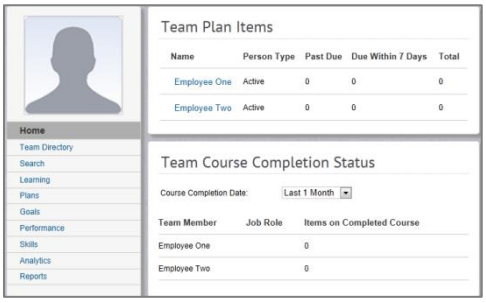
Purpose

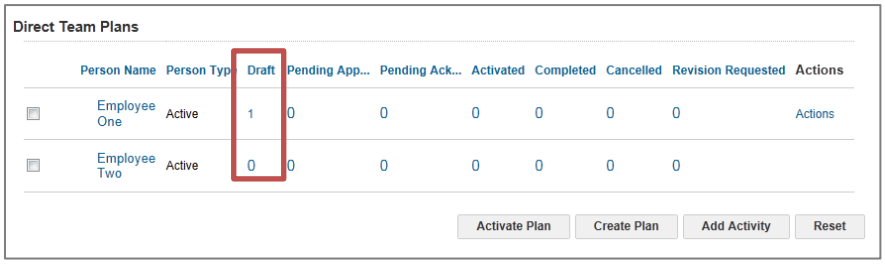
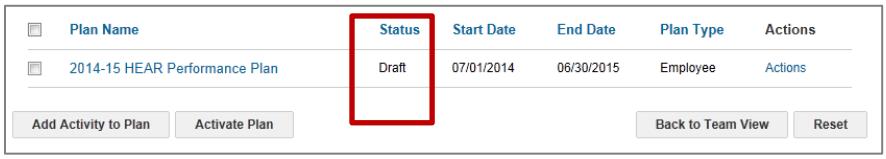
This job aid is to guide managers through the step-by-step process of how to add Behavioral Factors to a plan.

Process Flow

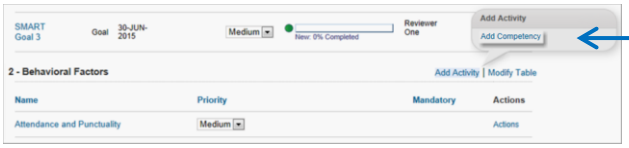


Procedure

Step	Action
1. Log into the Talent Management System (TMS) 1. Type your **Username** and **Password** 2. Click **Sign In**	• From any brower, type in https://talent.houstontx.gov.  • The Talent Management System log in screen displays. Type in your **Username** and **Password** then click **Sign In**.  • The homepage displays.
2. Navigate to My Team Click Plans	• Click the **My Team** icon in the top main header. The Team Dashboard page displays.  • In the left navigation pane, click **Plans**. The **Plans** page displays. 

Step	Action
3. View Team Member's Plan Click the number **1** link Click **Plan Name**	• In the **Direct Team Plans**, under the **Draft** column, click on the number **1** link next to the desired employee.  • Under the **Plan Name** column, click the Plan Name that is in **Draft** status to view the plan details. 

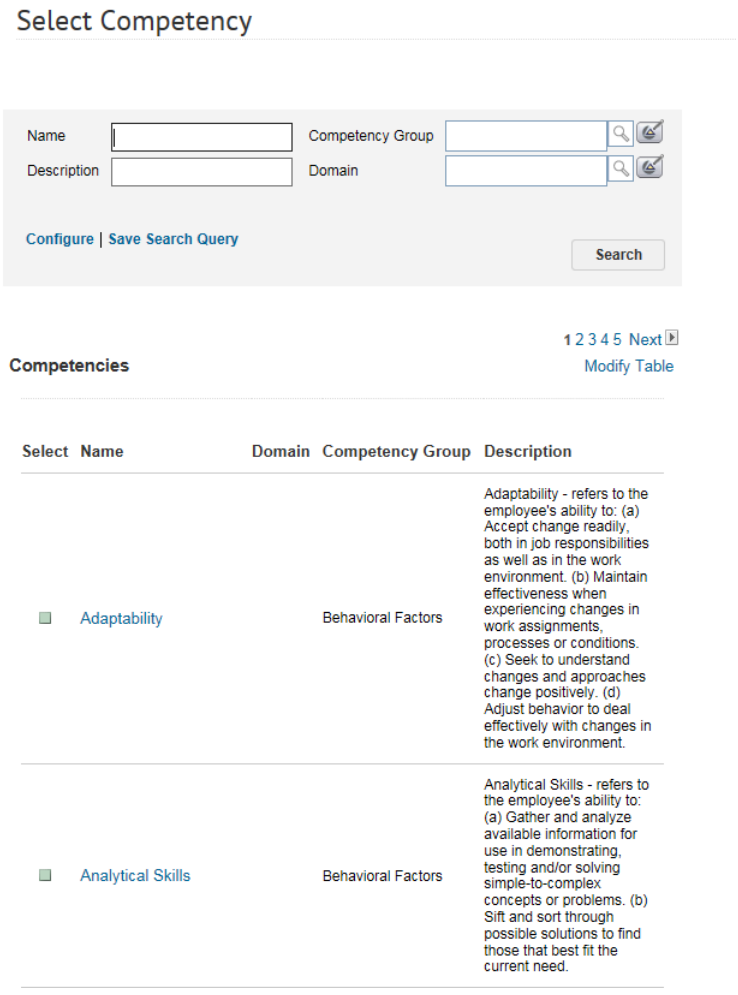
Step	Action
4. Adding Behavioral Factors	• The **Plan Details** page. • In the **2-Behavioral Factors** section, click **Add Activity** then **Add Competency**.



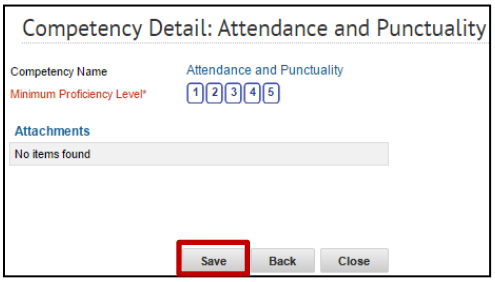
Click **Add Activity** > **Add Competency**

- The **Select Competency** window displays.
- The list of competencies corresponding to the desired competency group displays.
  - Behavioral Factors: Select Behavioral Factors from the Behavioral Factors Competency Group.
  - Supervisor/Manager Factors: Select Behavioral Factors from the Supervisor/Manager Factors Competency Group

**HAS employees can filter by domain 2800*



Click the **green, check box** to the left of the **desired competency** to select it.

Step	Action
	• The **Competency Detail** page displays. • Select the number **3** box for the **Minimum Proficiency Level** (Meet Expectations). • Click the **Save** button  • The **Add Activity to Plan** confirmation message displays and the selected competency is added to the employee's plan.

END OF PROCEDURE • RETURN TO TOP


Step
4

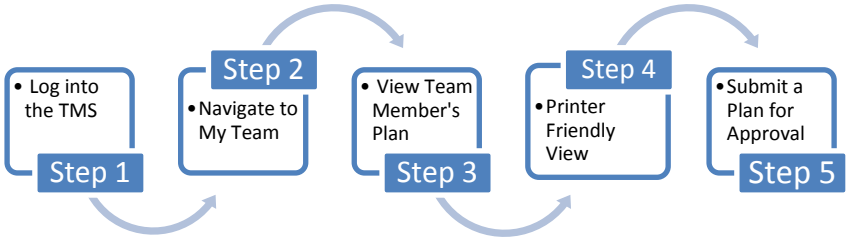
Submit Plan for Approval

ROLE: MANAGER

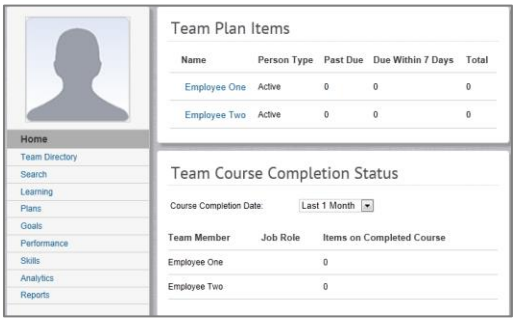
Purpose

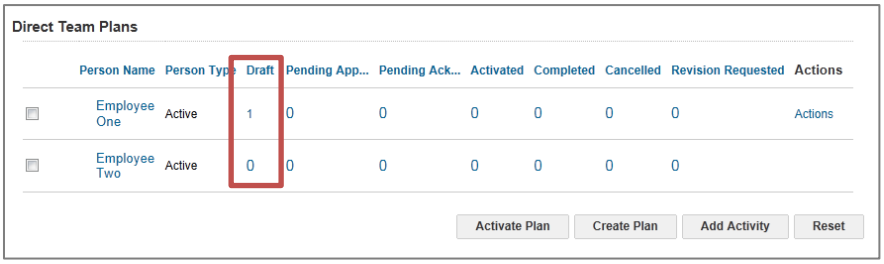
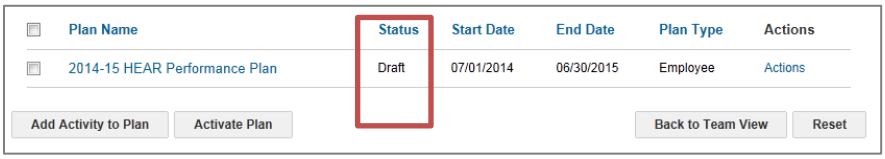
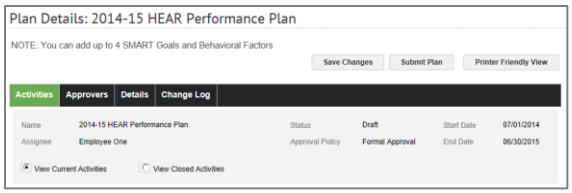
This job aid is to guide managers through the step-by-step of how to submit a plan for approval.

Process Flow

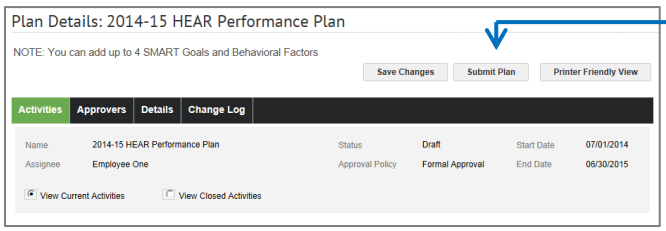


Procedure

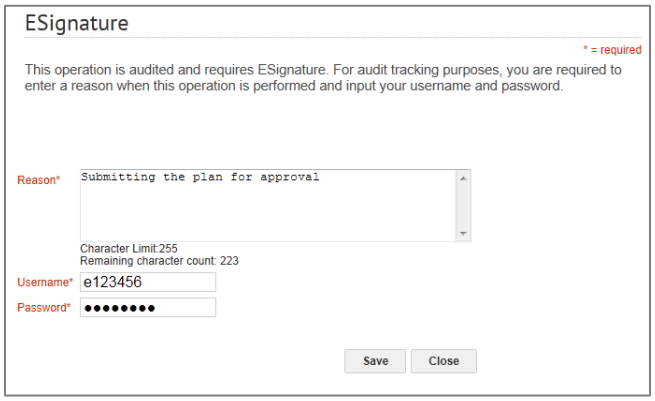
Step	Action
1. Log into the Talent Management System (TMS) 1. Type your **Username** and **Password** 2. Click **Sign In**	• From any brower, type in https://talent.houstontx.gov.  • The Talent Management System log in screen displays. Type in your **Username** and **Password** then click **Sign In**.  • The homepage displays.
2. Navigate to My Team Click **Plans**	• Click the **My Team** icon in the top main header. The Team Dashboard page displays.  • In the left navigation pane, click **Plans.** The **Plans** page displays. 

Step	Action
3. View Team Member's Plan	• In the Direct Team Plans, under the **Draft** column, click on the number **1** link next to the desired employee.
	
	• Under the **Plan Name** column, click the **Plan Name** that is in **Draft** status to view the plan details.
	
4. Printer Friendly View	• The **Plan Details** page displays. Click the **Printer Friendly View** button, so you can view the detailed plan.
	
	• The **Printer Friendly View of Plan** window appears. You can choose to print out the plan or view it on the screen. After you carefully review it, click the **Close** button.
	

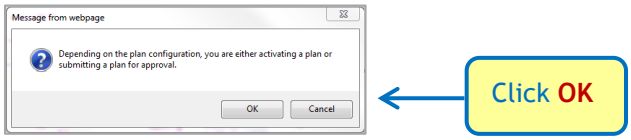
Step	Action
5. Submit the Plan for Approval	• Click the **Submit** button, the plan will be routed to the Reviewing Authority (your manager) for approval.



- The **ESignature** page displays. Type in a **Reason** for submitting the plan. Enter your **Username** and **Password** then click the **Save** button.



- The confirmation dialog box displays. Click the **OK** button.



- The **confirmation message** displays at the top. This confirms that the plan has been sent to the Reviewing Authority for approval.

END OF PROCEDURE • RETURN TO TOP