



2013

The HEAR Interim Application Step-by-Step Quick Checklist



City of Houston

Human Resources Department



DEPARTMENT OF HUMAN RESOURCES
HEAR INTERIM APPLICATION QUICK STEP-BY-STEP
CHECK LIST



TABLE OF CONTENTS

LOG INTO THE HEAR INTERIM APPLICATION	2
CREATE TEMPLATE NAME	2
CREATE TEMPLATE CONTENT	2
HEAR PERFORMANCE WORK PLAN	2
BEHAVIORAL FACTORS	3
SUPERVISOR/MANAGER FACTORS <i>(SUPERVISORS ONLY)</i>	3
ASSIGN HEAR PERFORMANCE WORK PLAN TEMPLATE TO EMPLOYEE	3
SUPERVISOR/MANAGER – INITIATES THE HEAR PROCESS	3
REVIEWING AUTHORITY – UPON RECEIPT OF ACTION ITEM EMAIL	4
EMPLOYEE – UPON RECEIPT OF ACTION ITEM EMAIL	4
CONDUCT FINAL HEAR ASSESSMENT	5
SUPERVISOR/MANAGER – CONDUCTS HEAR ASSESSMENT & CONFIRMS RATINGS	5
REVIEWING AUTHORITY – UPON RECEIPT OF ACTION ITEM EMAIL	6
EMPLOYEE – UPON RECEIPT OF ACTION ITEM EMAIL	6
SUPERVISOR/MANAGER – FINALIZES THE HEAR ASSESSMENT	7
THINGS TO REMEMBER	7



DEPARTMENT OF HUMAN RESOURCES

HEAR INTERIM APPLICATION QUICK STEP-BY-STEP CHECK LIST



LOG INTO THE HEAR INTERIM APPLICATION

- Go to <http://cohapp.cityofhouston.gov/HEAR/>
- Log-in using your ESS User ID and Password

CREATE TEMPLATE NAME

- Click the **Templates Button > Step 1: Create Template Name**
- Type in the **Template Name, Description, Start Date** and **End Date**

✓ *Click Insert*

CREATE TEMPLATE CONTENT

HEAR Performance Work Plan

- Click the **Templates Button > Step 2: Build Performance Work Plan**
- Click the **HEAR Performance Work Plan Template Content**
- Click the **Mayor's Priorities** drop-down and select one priority
- Populate the **Task Short Description** and **SMART Goal Criteria Description**
 - Use Microsoft Word if you find it easier to accomplish this task (Spell check, cut and paste, etc.)
 - Use **semi-colons (;)** between SMART Goal Factors

✓ *Click Insert*

- Repeat until complete
 - For the 2013 Assessment Cycle, limit your choice of **SMART Goals** to four (4)



- Additional SMART Goal training is available at the E.B. Cape Center, starting late April 2013; registrations are processed via the LMS

Behavioral Factors

- Click the **Behavioral Factor** drop-down and select one factor
 - For the 2013 Assessment Cycle, limit your choice of **Behavioral Factors** to four (4)
 - Detailed listing of each factor can be viewed via:
http://www.houstontx.gov/hr/files/hear_files/HEAR-Reference-FINAL%2010102012.pdf (pgs. 20-23)

✓ *Click Insert*

- Repeat until complete

Supervisor/Manager Factors (Supervisors Only)

- Click the **Supervisor/Manager Factor** drop-down and select one factor
 - For the 2013 Assessment Cycle, limit your choice of **Supervisor/Manager Factors** to four (4)
 - Detailed listing of each factor can be viewed via:
http://www.houstontx.gov/hr/files/hear_files/HEAR-Reference-FINAL%2010102012.pdf (pgs. 24-25)

✓ *Click Insert*

- Repeat until complete

ASSIGN HEAR PERFORMANCE WORK PLAN TEMPLATE TO EMPLOYEE

Supervisor/Manager – Initiates the HEAR Process

- Select an employee from the **Home** page



DEPARTMENT OF HUMAN RESOURCES

HEAR INTERIM APPLICATION QUICK STEP-BY-STEP CHECK LIST



- Click the **Create New Hear Plan** button (yellow)
- Select a **Template** from the drop-down
- Populate the review period **Start Date** and **End Date**
- Review, sign, and save
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your log-in credentials to save; be sure to save after signing
 - Upon **Signing** and **Saving**, two emails are sent, one to the employee that requires no action, and one to the Reviewing Authority (RA), the manager's manager, requiring action; action item emails have a 15-day deadline
 - Supervisors/Managers should meet with the employee either before or during the RA reviewing window to discuss the HEAR Performance Work Plan

Reviewing Authority – Upon Receipt of Action Item Email

- Log into the HEAR Interim Application **Home** page
- Locate **Indirect Reports** that require action
- Click the **Sign For** link next to the corresponding **Indirect Report** (employee)
- Review, sign, and save
 - **Provide comments (as needed)**
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your log-in credentials to save; be sure to save after signing
 - Upon **Signing** and **Saving**, the **Indirect Report (employee)** will receive an action item email; action item emails have a 15-day deadline

Employee – Upon Receipt of Action Item Email

- Log into the HEAR Interim Application and view the **Home** page



DEPARTMENT OF HUMAN RESOURCES
HEAR INTERIM APPLICATION QUICK STEP-BY-STEP
CHECK LIST



- Open current HEAR Performance Work Plan (PWP)
- Review, sign, and save
 - **Provide comments (as needed)**
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your login credentials to save; be sure to save after signing
 - Upon **Signing** and **Saving**, the **direct supervisor/manager** will receive an acknowledgement email to confirm that his/her employee's HEAR PWP is now **Active**
 - Supervisors/Managers will meet with the employee at least 2X during the assessment cycle to provide feedback, coaching, and counselling
 - Supervisors can use the [HEAR Performance Work Progress and Coaching Form](#) to document his/her employee's performance progress via:
[http://www.houstontx.gov/hr/files/hear_files/Work%20Progress%20Meeting%20&%20Coaching%20%20Forms%20-%20NAP%20\(Revised%20113012\)%20Save%20Ready.pdf](http://www.houstontx.gov/hr/files/hear_files/Work%20Progress%20Meeting%20&%20Coaching%20%20Forms%20-%20NAP%20(Revised%20113012)%20Save%20Ready.pdf)

CONDUCT FINAL HEAR ASSESSMENT

Supervisor/Manager – Conducts HEAR Assessment & Confirms Ratings

- Log into the HEAR Interim Application and view the **Home** page
- Select employee needing the final HEAR Assessment
- Open HEAR PWP and select ratings for each SMART Goal, Behavioral Factor, and Supervisor/Manager Factor (as required)
- Populate all comments; remember to spell check in Microsoft Word and to choose appropriate language when describing the employee's performance (**Required**)
- Review, sign, and save
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your login credentials to save; be sure to save after signing



DEPARTMENT OF HUMAN RESOURCES
HEAR INTERIM APPLICATION QUICK STEP-BY-STEP
CHECK LIST



- Upon **Signing** and **Saving**, two emails are sent, one to the employee that requires no action, and one to the Reviewing Authority (RA), the manager's manager, requiring action; action item emails have a 15-day deadline
- Supervisors/Managers should meet with the employee either before or during the RA reviewing window to discuss the final HEAR Assessment ratings

Reviewing Authority – Upon Receipt of Action Item Email

- Log into the HEAR Interim Application **Home** page
- Locate **Indirect Reports** that require action
- Click on **Sign For** link next to the corresponding **Indirect Report** (employee)
- Review, sign, and save
 - **Provide comments (as needed)**
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your login credentials to save; be sure to save after signing
 - Upon **Signing** and **Saving**, the **Indirect Report (employee)** will receive an action item email; action item emails have a 15-day deadline

Employee – Upon Receipt of Action Item Email

- Log into the HEAR Interim Application **Home** page
- Open current HEAR Performance Work Plan (PWP)
- Review, sign, and save
 - **Provide comments (as needed)**
 - **Save now without signing and return later to complete this step**
 - If you are ready to sign, enter your login credentials to save; be sure to save after signing
 - Upon **Signing** and **Saving**, the **direct supervisor/manager** will receive an acknowledgement email to confirm that the HEAR PWP Assessment is completed and needs to be **Locked**



DEPARTMENT OF HUMAN RESOURCES

HEAR INTERIM APPLICATION QUICK STEP-BY-STEP CHECK LIST



Supervisor/Manager – Finalizes the HEAR Assessment

- Select an employee from the **Home** page
- Open final HEAR PWP Assessment
- Click the **Final Submit** button to lock the HEAR Assessment
 - The employee's status will convert from **Completed** to **Locked**
 - The HEAR Interim Application will **programmatically send the final rating to SAP**
- Proceed to create a new **HEAR PWP** for the employee within **30 days after the assessment has been locked**

THINGS TO REMEMBER

- The HEAR Interim Application is a work in progress; report any issues to hear@houston.tx.gov
- The HEAR Interim Application will time out after 45-60 minutes of inactivity and users must log back in to continue pending transactions
- Register for a HEAR Interim Application Training session for Supervisors and Managers and view the Introductory Web-based Training video via the LMS
- The HEAR Interim Application is accessible anywhere there is internet connectivity with valid log-in credentials via <http://cohapp.cityofhouston.gov/HEAR/>

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