Quick Guide -- detailed information at [http://mcclenaghanl.people.cofc.edu/epms/index.html](http://mcclenaghanl.people.cofc.edu/epms/index.html)

► EVALUATION CYCLE

STEP 1  Supervisor/Rating Officer  Creates Plan

STEP 2  Employee  Acknowledges Plan

STEP 3  Employee  Completes Self-Evaluation (this step is optional)

STEP 4  Supervisor/Rating Officer  Completes Evaluation and Ratings

STEP 5  Reviewing Officer  Approves Supervisor Evaluation

STEP 6a and 6b  Supervisor and Employee  Meet AND BOTH ACKNOWLEDGE

► LOG-IN

1. Access PeopleAdmin from a browser window [http://jobs.cofc.edu/hr/sso](http://jobs.cofc.edu/hr/sso)

2. Verify correct information (see Ed Pope preparation memo 12/08/14 [http://mcclenaghanl.people.cofc.edu/epms/index.html](http://mcclenaghanl.people.cofc.edu/epms/index.html))

   a. Incorrect information – email epms@cofc.edu

   b. Note: Job duties may not be changed at this point, email epms@cofc.edu for instructions

3. Change module to Performance Management (upper right corner-banner will be purple)

4. Access Employee Portal (upper right corner under drop-down of module choices)

► HOME SCREEN

1. Action Items will list any task that is due

2. My Reviews will access dashboard for your personal evaluation

3. My Employee Reviews will access dashboard for all of your employee evaluations

► STEP 1 AND 2 PLAN

1. The Plan and Goal Setting start the new evaluation period.

2. After the prior year evaluation is completed, the supervisor will open the Plan to populate goals, and the employee will acknowledge the Plan consisting of. The goals will then populate into the evaluation.

3. Goals may be revised during the year.
►STEP 3 – SELF-EVALUATION

Note – If supervisor approves, the self-evaluation step may be by-passed

1. Employee provides verbiage for each item under each tab:
   a. Values and Characteristics
   b. Job Duties
   c. Strengths and Accomplishments
   d. Goals
   e. Overall Comments

2. Save Draft Often and when complete, select “Complete” at the top under blue Action button or at the bottom

   IMPORTANT: once completed, it cannot be sent back to employee

►STEP 4 – SUPERVISOR EVALUATION

1. Supervisor may copy and paste employee self-evaluation or provide their own verbiage

2. Supervisor selects ratings from dropdown

3. SUPERVISOR MAKES SURE THERE IS AN OVERALL RATING!

4. Supervisor sends evaluation to Reviewing Officer by selecting “Complete” under blue Action button at the top or at the bottom

►STEP 5 – REVIEWING OFFICER APPROVES EVALUATION

1. Reviewing Officer may “Accept” or “Reject” the evaluation with notes

2. Notes should be very simple (i.e. call for discussion of overall rating or call for discussion of job duty). There should be a meaningful consensus discussion.

3. IMPORTANT…Notes are at the very bottom…scroll down below employee comments

4. If Reviewing Officer “Rejects”, the evaluation will go back to supervisor’s Action Items for revision
STEP 6A AND B—SUPERVISOR AND EMPLOYEE ACKNOWLEDGE MEETING

1. Supervisor and Employee meet to discuss evaluation and preliminary goals for 2014
2. Both Supervisor (first) and Employee acknowledge that the meeting has taken place

GENERAL INFORMATION AND REMINDERS

1. Contact epms@cofc.edu with any questions
2. Emails should alert any new actions (sometimes there may be more than one)
3. HR cannot send back any evaluations – be careful of “Complete”
4. The evaluation will not be considered valid until all actions have been completed
5. Check all information carefully!
6. Do not forget the OVERALL RATING!
7. DO NOT GET FRUSTRATED…if you have a question, call (as long as it is before March 1)
8. SAVE OFTEN
9. READ INSTRUCTIONS