

# PEP Instructions for Supervisors

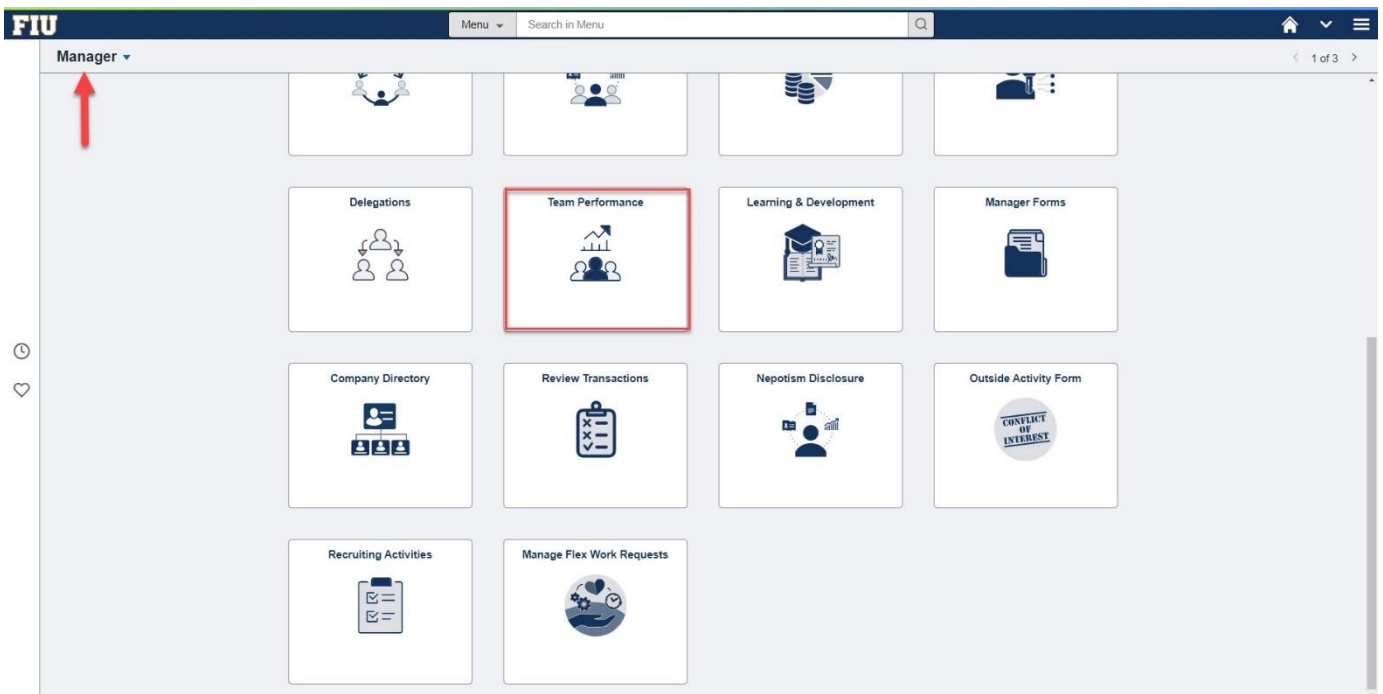
## Step 1: Login

Go to [MyHR.FIU.edu](https://myhr.fiu.edu) and login using your My Accounts credentials.

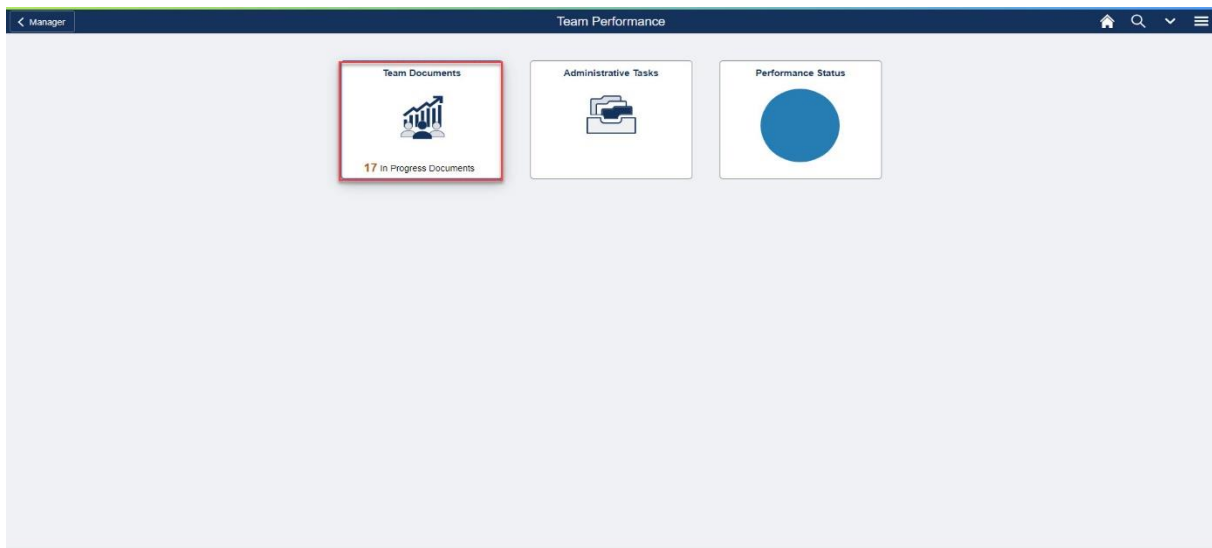


## Step 2: Access Employee Documents

Access your employee's document by using the Team Performance tile from your [MyHR.FIU.edu](https://myhr.fiu.edu) Manager Home Page.



Access the Team Documents tile.



### Step 3: Select Employee Document

Access each individual PEP document by clicking on the name of the employee or opening the menu and selecting “open”.

The screenshot shows the 'Team Documents' page. The top bar indicates the environment is 'PSHRSTG refreshed on WED, JUN. 21, 2023'. The page has a sidebar on the left with search filters and a main content area. The main content area has two tabs: 'Team Documents' and 'Delegated Documents'. Under 'Team Documents', there's a search bar and a list of documents under the heading 'Evaluation in Progress'. A red arrow points to the first document, 'Roary 1', which is highlighted. The list includes employee names, roles, and due dates.

Employee	Role	Assessment and Planning	Due Date
Roary 1	Senior Specialist	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Sunblazer 1	Academic Advisor II	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Roary 2	Academic Advisor I	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Sunblazer 2	Manager Academic Advising Svcs	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Roary 3	Academic Advisor II	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Sunblazer 3	Asst. Dir. Acad Advising Svcs	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Roary 4	Assoc. Dir Acad Advising Svcs	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Sunblazer 4	Office Coordinator	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Roary 5	Academic Advisor I	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023
Sunblazer 5	Asst. Dir. Acad Advising Svcs	1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023

## Step 4: Start Manager Evaluation

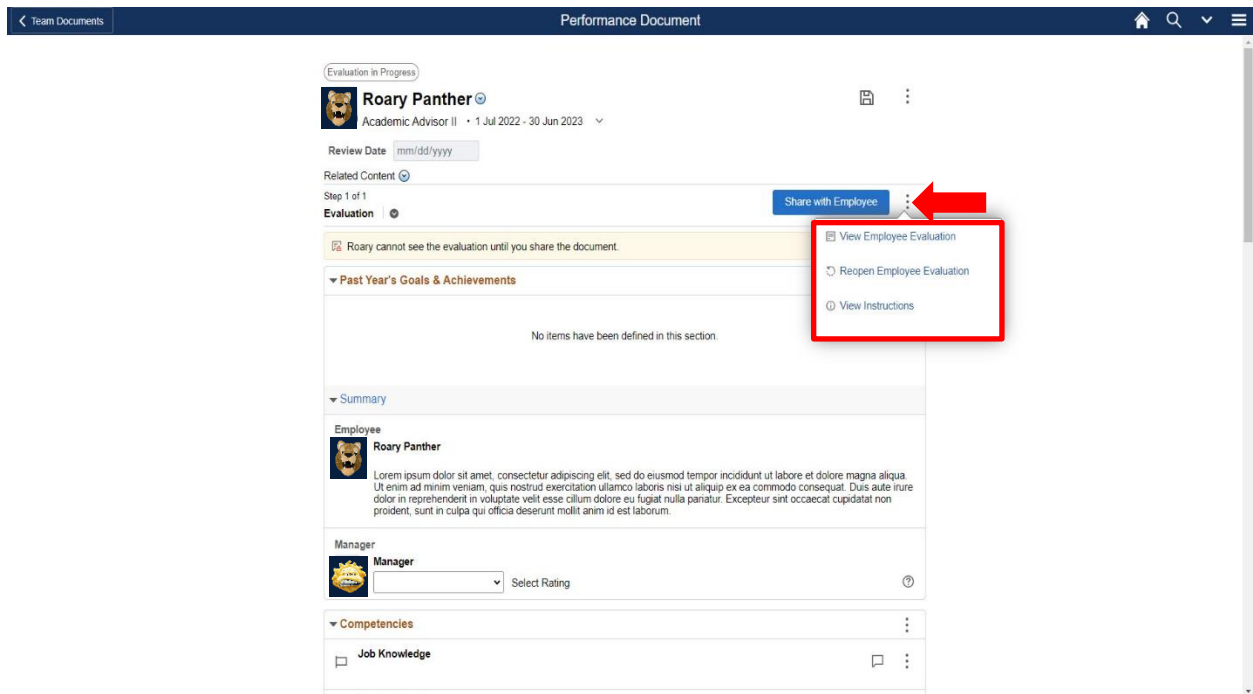
You can use the Related Content dropdown menu to review past PEPs for this employee and view their professional development hours.

Note: you do not need to wait until your employee has completed the Self Evaluation to begin the Manager Evaluation.

The screenshot shows the 'Performance Document' interface for an employee named Roary Panther. The document is titled 'Performance Document' and is currently in 'Evaluation in Progress' status. The interface includes a header with navigation links for 'Team Documents', 'Performance Document', and a search icon. Below the header, the document details for Roary Panther are displayed, including a 'Review Date' of 11/1/2023 and a 'Related Content' dropdown menu. The 'Related Content' dropdown is open, showing a list of documents: 'Historical Documents' and 'Team Training Summary'. A red box highlights the 'Team Training Summary' option. Below the dropdown, there is a 'Share with Employee' button. A yellow warning message states: 'Roary cannot see the evaluation until you share the document.' The main content area is divided into sections: 'Past Year's Goals & Achievements' (containing 'Goal 1' and 'Goal 2'), 'Summary' (containing 'Employee' and 'Manager' sections), and 'Competencies' (containing 'Compliance and Accountability' and 'Attendance'). The 'Employee' section shows 'Roary Panther' with the note 'Employee has not completed their self-evaluation'. The 'Manager' section shows 'Manager' with a 'Calculate' button. The 'Competencies' section shows 'Compliance and Accountability' and 'Attendance' with checkboxes and comment icons.

## Steps and Tasks

Managers can view the employee evaluation, as well as reopen the evaluation, by opening the menu next to the “share with employee” button.



## Step 5: Past Year's Goals & Achievement



All goals set by the manager in the most recent completed PEP will roll over to the current document. These goals can be edited and rated. List additional goals or accomplishments the employee achieved during the past fiscal year. These may include goals or accomplishments related to the employee's position. Click on the plus sign to add a goal or an accomplishment.

Team Documents

Performance Document


Home Search Filter Menu

Evaluation in Progress


**Roary Panther** 


Academic Advisor II • 1 Jul 2022 - 30 Jun 2023


Review Date



Related Content 

Step 1 of 1

Evaluation 

Share with Employee 


 Roary cannot see the evaluation until you share the document.

▼ Past Year's Goals & Achievements  

No items have been defined in this section.


▼ Summary


Employee


**Roary Panther**


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Manager

**Manager**

Select Rating 

▼ Competencies 

 Job Knowledge

Last Modified June 23, 2023

You will need to enter a general title for the goal and click on Add. You may also include the Status and Percent Complete for each goal.

Cancel

Past Year's Goals & Achievements

Done

\* Indicates required field

Select / Create Items

Roary Panther

Your Own

You can add multiple items and they will be temporarily added to the list. Browse the list to remove the added items. You can edit items after saving in the document.

Details

\*Title

Evaluation

Status

Percent Complete

Clear

Add to List

Click on the goal or achievement's name, or the Quick Evaluation button, in order to rate and add comments for each goal and/or achievement.

The screenshot shows the 'Performance Document' interface for 'Roary Panther', an Academic Advisor II. The document is in 'Evaluation In Progress' status, with a review date range from July 1, 2022, to June 30, 2023. The interface includes a 'Share with Employee' button and a message stating 'Roary cannot see the evaluation until you share the document.' The main section is titled 'Past Year's Goals & Achievements' and contains a list of achievements. 'Achievement 1' is highlighted with a red arrow. Below this is a 'Summary' section showing the employee's profile, a manager profile, and a 'Calculate' button. The 'Competencies' section lists 'Job Knowledge' (3 - Fully Meets) and 'Service Excellence'.

Enter a rating and supporting comments for each goal entered.

Once the employee completes the Self-Evaluation any ratings or comments they provided will be visible within the Manager Evaluation.

The screenshot shows the 'Quick Evaluation' dialog box for 'Achievement 1'. The dialog has a 'Cancel' button and a 'Done' button. It displays the achievement name and a 'No Description' message. The 'Manager' section shows a dropdown menu with '4 - Consistently Exceeds' selected, and a 'Numeric Rating 4.00' field. Below this is a text area for 'Manager comments here'. A red box highlights the rating dropdown and the comments text area. At the bottom, a message states 'Rossy cannot see your evaluation'.

## Step 6: Competencies

You must rate your employees on each of the competencies and enter comments. The system will not allow you to move to the next step (“Share with Employee”) until you have entered all the required information.

Once the employee completes the Self-Evaluation their ratings and comments will be visible within the Manager Evaluation.

Note: The system will timeout after 20 minutes of inactivity – **be sure to SAVE your work often!**

[Return to Performance Document](#)Performance Document Item1 of 5

Competencies

**Job Knowledge**  
Roary Panther


Details

TitleJob Knowledge

DescriptionContinuous learner in field and new technologies applicable to position; successfully performs all duties in the position description; ability to see and make connections holistically; creatively integrates different ideas and perspectives.


Evaluation

Employee

**Roary Panther**  
5 - Far Exceeds  

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Manager

**Manager**  
3 - Fully Meets  
Numeric Rating 3.00

FontSizeB I U

Manager comments here



## Step 7: Overall Assessment

The Overall Rating is calculated based on goals and competencies ratings. Click the calculator icon to recalculate the ratings at any time. To change the summary rating, select a rating from the dropdown menu, then substantiate the change in the Manager Comments.

Note: If the Overall Rating is a decimal, it will automatically round up to the nearest whole number.

Team Documents

Performance Document

Compliance and Accountability

Communication and Interpersonal Skills

Efficiency

Summary

Employee

Roary Panther

No comment entered

Manager

3 - Fully Meets

Numeric Rating 3.00

Rating Calculated

Calculate

Overall Summary

Employee

Roary Panther

Employee has not completed their self-evaluation

Manager

4 - Consistently Exceeds

Numeric Rating 3.50

Rating Calculated

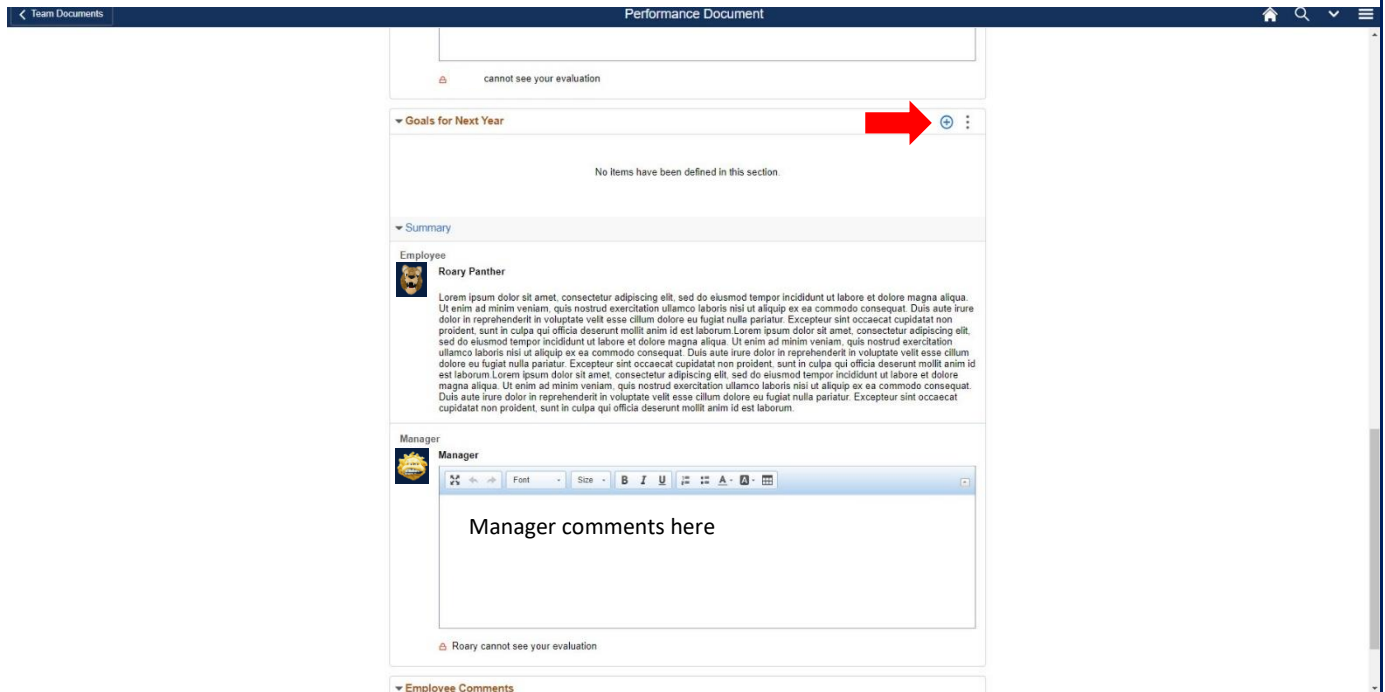
Manager comments here

Rossly cannot see your evaluation

Final for Next Year

## Step 8: Goals for Next Year

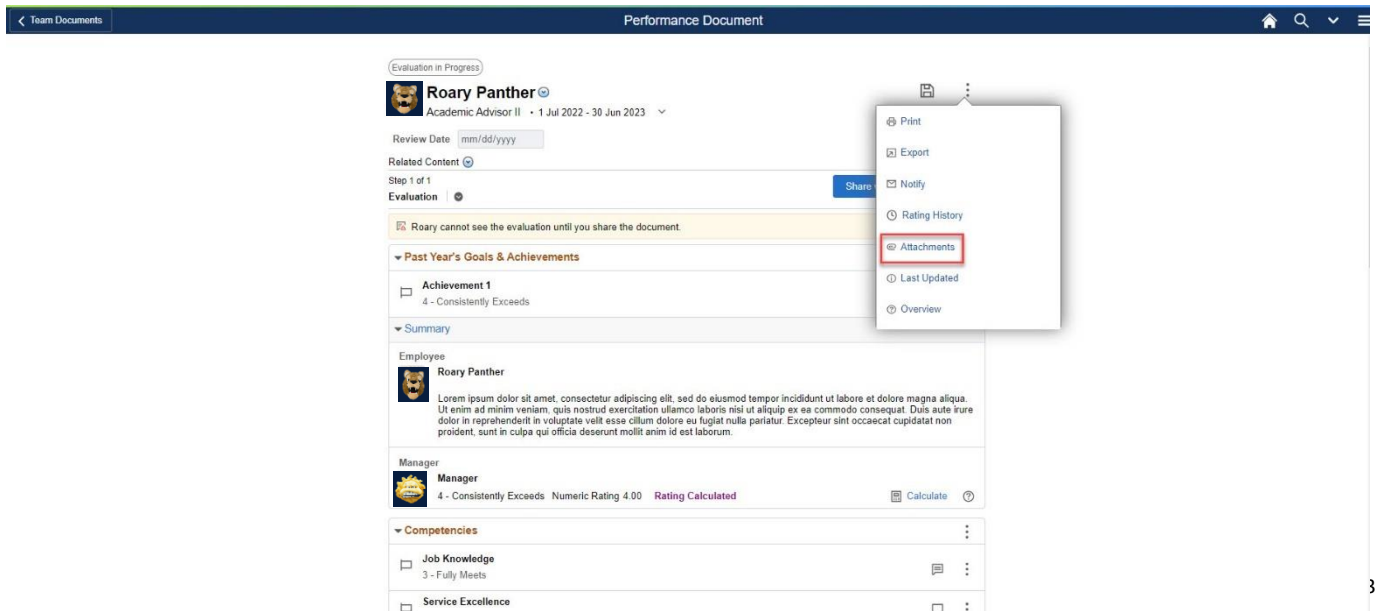
You must enter a minimum of two goals for your employees and include comments for each goal. The system will not allow you to move to the next step ("Share with Employee" located at the top of the evaluation) until you have entered all the necessary information.



When an employee has completed the self-review, the employee-suggested goals will be visible for reference to the manager.

## Step 9: Attachments

You may attach supporting documentation to your Manager Evaluation by opening the menu and selecting "Attachments". Attachments may be in the form of .pdf, .docx, or .jpg files.

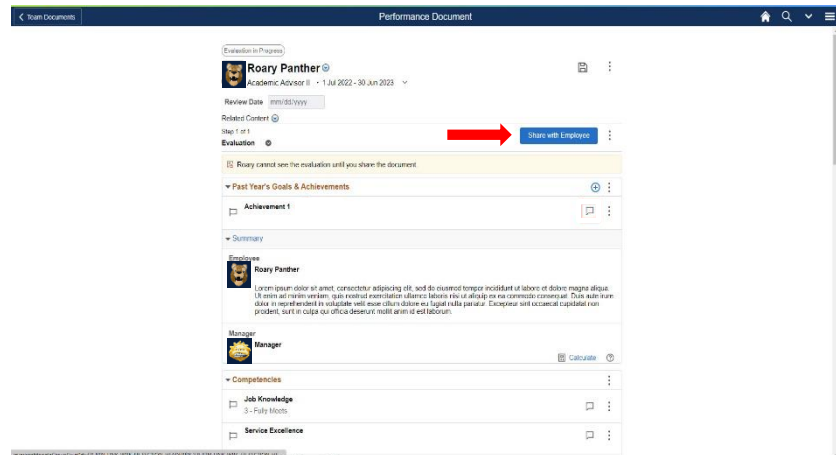


## Step 10: Share with Employee

Once all required fields have been entered, mark “Share with Employee”. This will generate an email to your manager and the employee to review the evaluation prior to the performance discussion. This step is important so that any revisions occur prior to the performance discussion with the employee. There is no additional system action required to move on to the next step. [Please review the Instructions for Second-Level Managers for more information if you have managers reporting to you.]

### Required Fields Checklist

1. Competencies
  - ☐ Rating
  - ☐ Comments
2. Overall Summary
  - ☐ Rating
3. Goals for Next Year
  - ☐ Minimum of 2 goals
  - ☐ Comments

The screenshot shows the 'Performance Document' interface for 'Roary Panther'. It includes fields for 'Review Date', 'Related Content', and 'Evaluation'. A red arrow points to the 'Share with Employee' button. Below this, there is a section for 'Past Year's Goals & Achievements' and a 'Summary' section. The 'Employee' section shows 'Roary Panther' and the 'Manager' section shows 'Manager'. There are also sections for 'Competencies', 'Job Knowledge', and 'Service Excellence'.

## Step 11: Hold Performance Discussion

Schedule and hold the performance discussion with your employee. Remember, this is one of the most important parts of the performance management process.

## Step 12: Request Acknowledgment

Once the performance discussion has been held, you may mark “Request Acknowledgment” and enter the date that the review occurred.

The screenshot shows the 'Performance Document' interface with the 'Review Date' field highlighted with a red box. Below it, the 'Related Content' section is visible. At the bottom, the 'Step 1 of 1' and 'Evaluation' sections are shown. A red box highlights the 'Request Acknowledgement' button.

Your employee will be notified when you mark “Request Acknowledge”, and must “Acknowledge” that the performance discussion has taken place. DO NOT acknowledge on their behalf unless an employee refuses to acknowledge. In those instances please contact Employee and Labor Relations to apprise them of the situation.

When the employee has Acknowledged the evaluation, you will receive a notification. At that point you will be able to Submit to the second level manager for final approval.

Last Modified June 23, 2023

## Step 15: Historical Documents

Once the document is approved by the second-level manager you will receive a notification. You can access the PEP document by including historical documents.

Team Performance

Team Documents

Home Search Filter Menu

New Search

From  
MM/DD/YYYY

To  
MM/DD/YYYY

☐ Use Exact Dates

☐ Include Historical Documents

Name

Search Clear

Employee

☐  
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More

Document Usage











☐ Performance

Document Type

Team Documents Delegated Documents

Search by Name... → ▾

Evaluation in Progress

	<b>Roary 1</b> Office Specialist Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Sunblazer 1</b> Academic Advisor II Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Roary 2</b> Academic Advisor I Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Sunblazer 2</b> Manager Academic Advising Svcs Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Roary 3</b> Academic Advisor II Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Sunblazer 3</b> Asst. Dir. Acad Advising Svcs Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Roary 4</b> Assoc. Dir Acad Advising Svcs Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Sunblazer 4</b> Office Coordinator Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Roary 5</b> Academic Advisor I Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮
	<b>Sunblazer 5</b> Asst. Dir. Acad Advising Svcs Assessment and Planning • 1 Jul 2022 - 30 Jun 2023	Due 28 Jul 2023	⋮

If you have any further questions or feedback please contact the Department of Talent Management and Development at [tam@fiu.edu](mailto:tam@fiu.edu) or 305-348-3206.