PEP Instructions for Supervisors
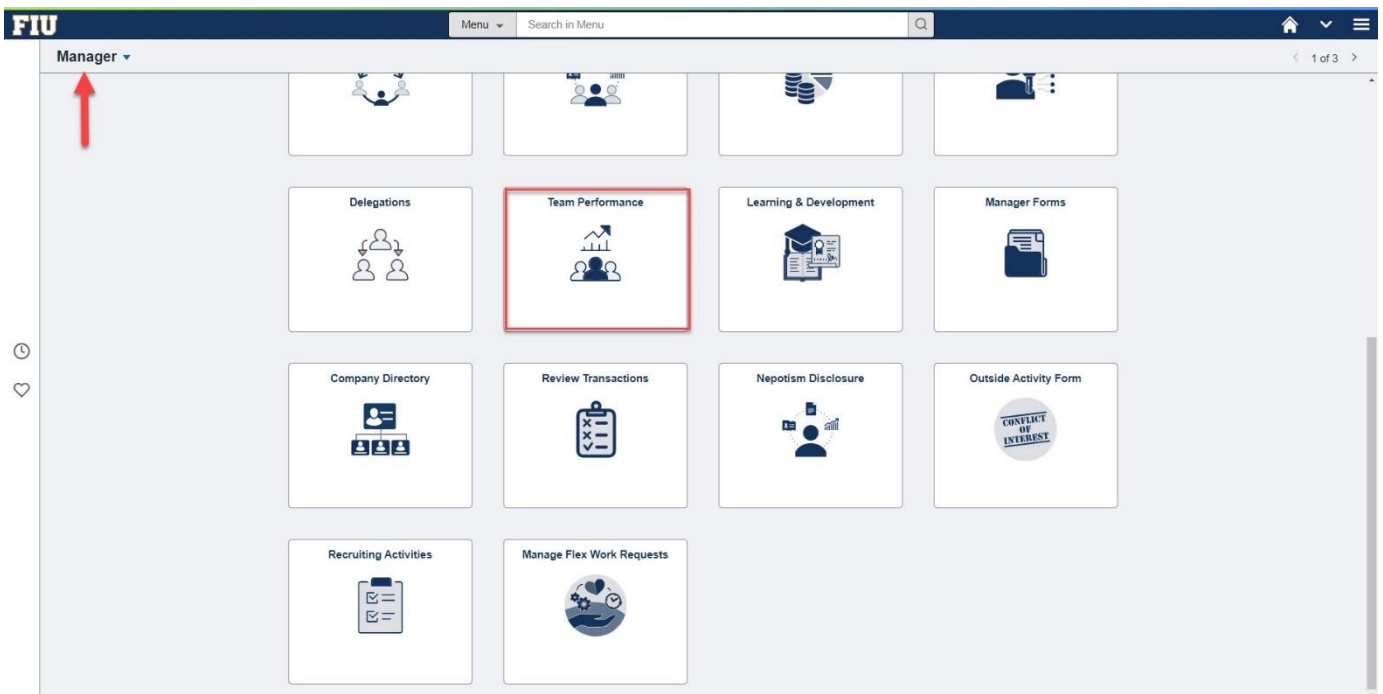
Step 1: Login

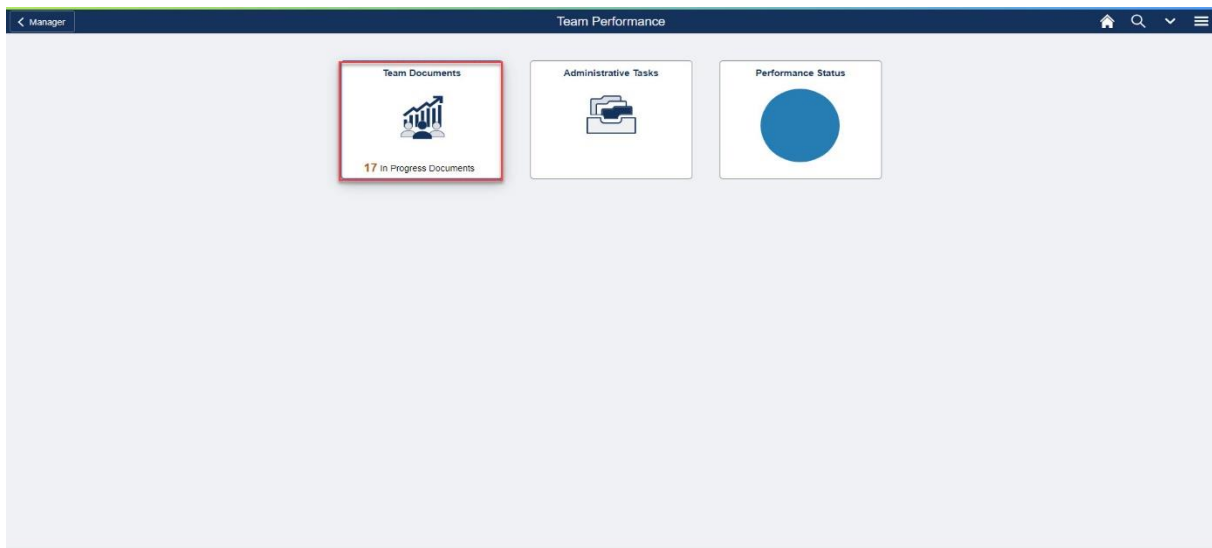Go to MyHR.FIU.edu and login using your My Accounts credentials.

Step 2: Access Employee Documents

Access your employee's document by using the Team Performance tile from your MyHR.FIU.edu 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".

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.

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.
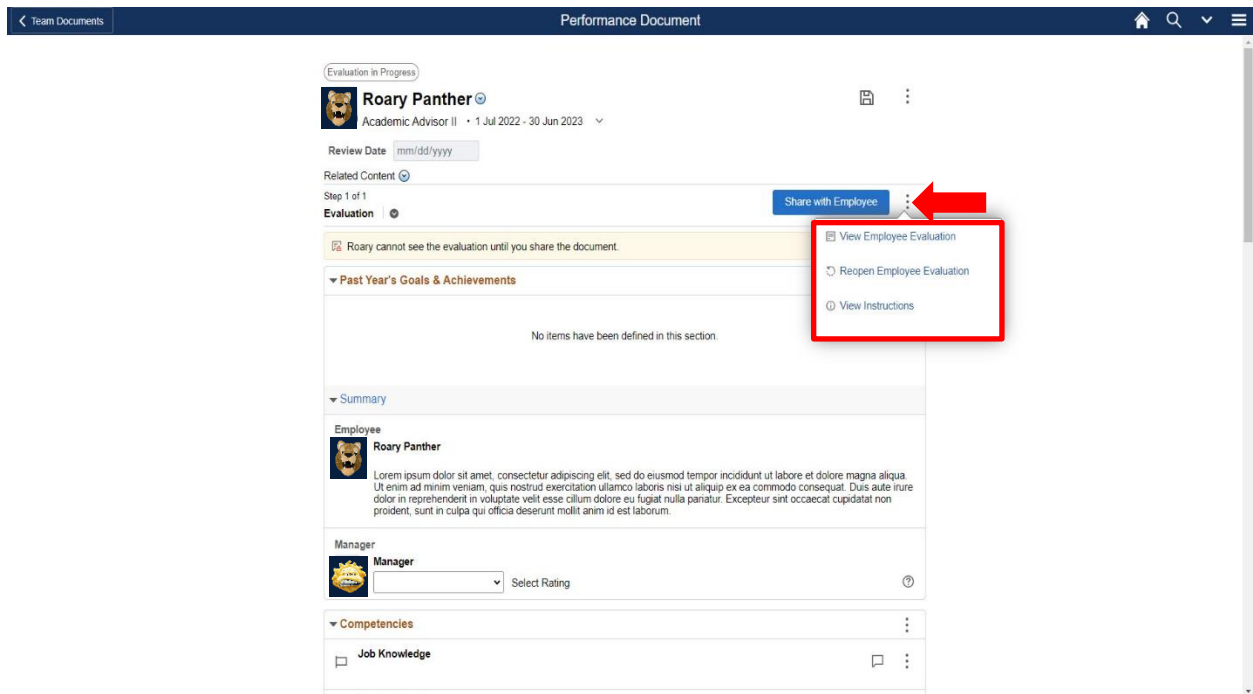
Step 5: Past Year's Goals & Achievement

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.

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.

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.

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.

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!**

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.

Step 8: Goals for Next Year
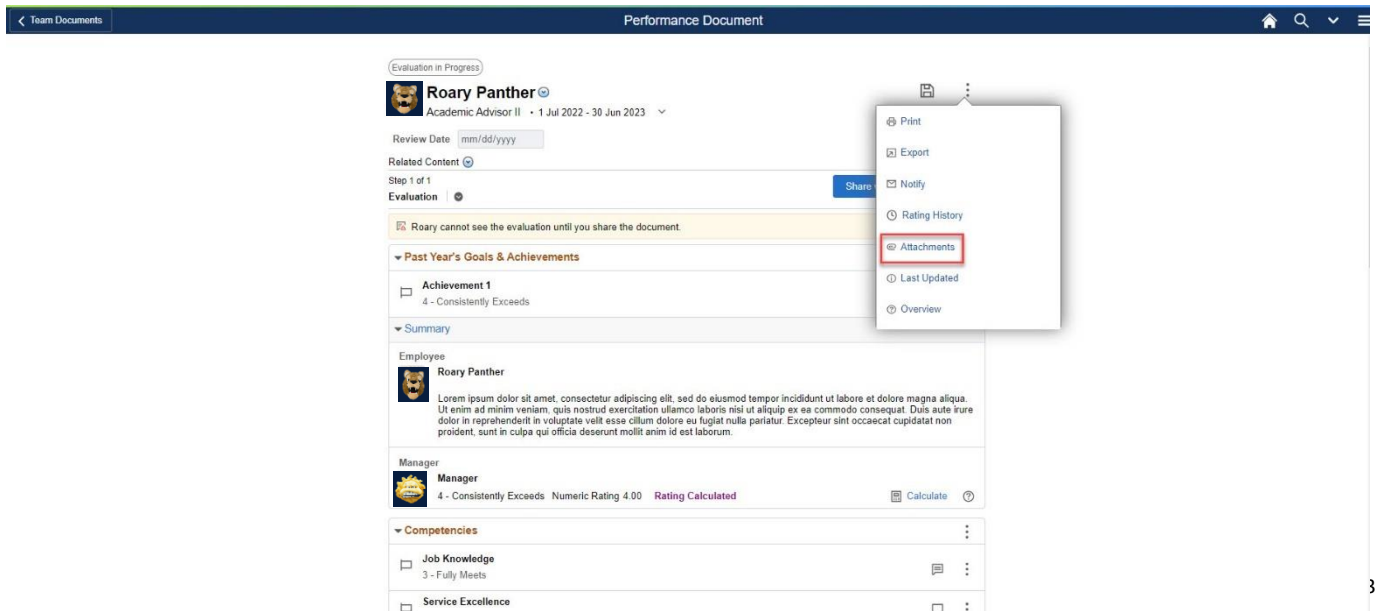
You must enter a <u>minimum</u> of <u>two</u> goals for your employees and include <u>comments</u> for each goal. The system will not allow you to move to the next step ("Share with Employee" located at the top of the evaluation) until you have entered all the necessary information.

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 emp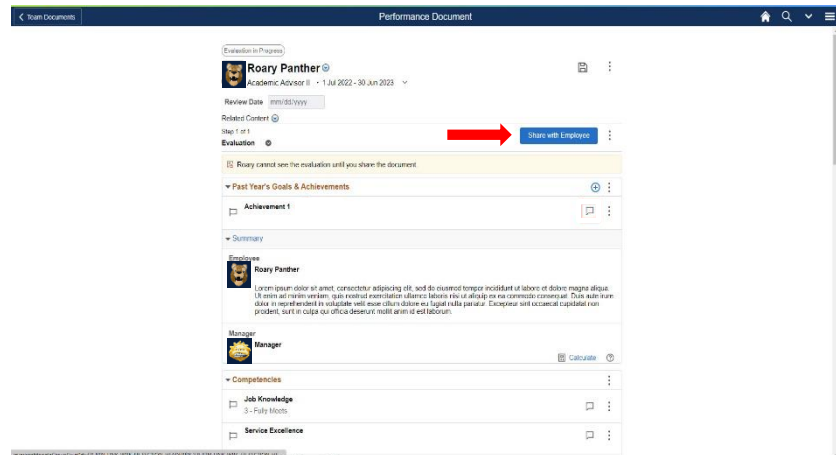loyee to review the evaluation prior to the performance discussion. This step is important so that any revisions occur prior to the performance discussion with the employee. There is no additional system action required to move on to the next step. [Please review the Instructions for Second-Level Managers 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

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.

Step 13: Employee Must Acknowledge

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.

Step 14: Submit for Approval

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.

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.

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

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