

# PEP Instructions for Employees

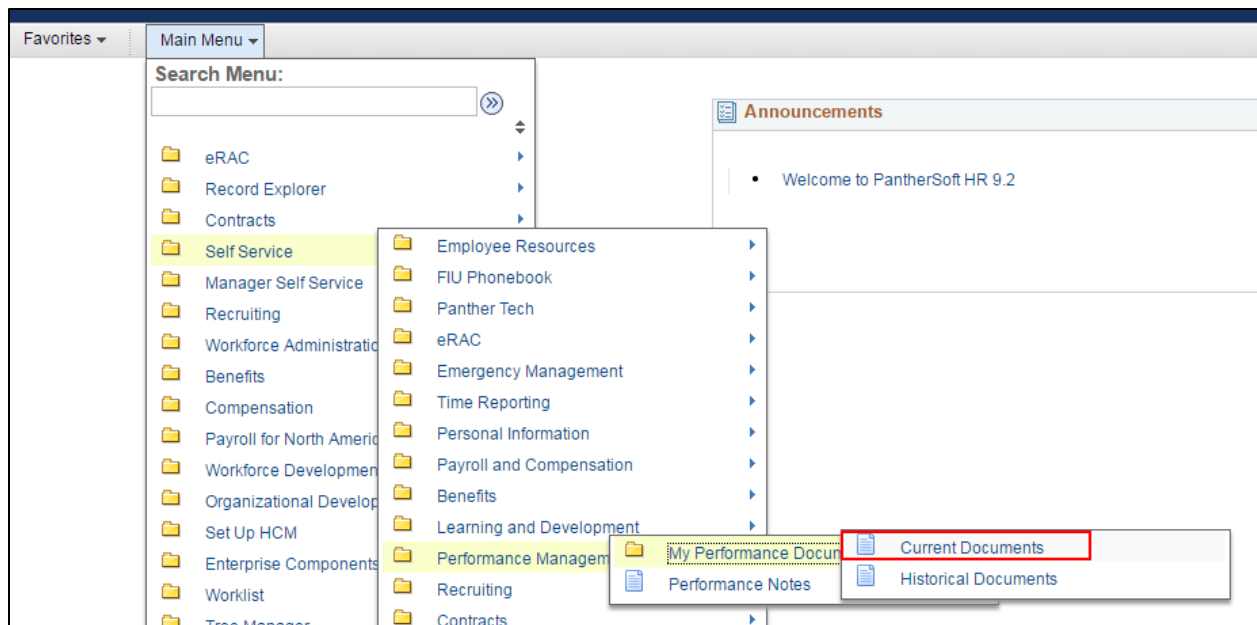
## Step 1: Login

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



## Step 2: Access Employee Documents

Access your document by using the Self-Service path from your [MyHR.FIU.edu](https://myhr.fiu.edu) Main Menu.



### Step 3: Select Employee Document

Access your PEP document by clicking on the link shown below.

Favorites > Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents

#### Current Performance Documents

Kathryn Lopez  
Listed are your current performance documents.

Employee ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
0000000	<a href="#">Assessment and Planning</a>	Evaluation in Progress	07/01/2016	06/30/2017	Project Manager	07/28/2017	Eran Arbel

### Step 4: Start Self- Evaluation

Expand All sections before you begin.

Favorites > Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents

#### Performance Process

Steps and Tasks

Kathryn Lopez  
Assessment and Planning  
07/01/2016 - 06/30/2017 Overview

- Complete Self Evaluation  
Due Date 07/28/2017  
[Update and Complete](#)
- Review Manager Evaluation  
Due Date 09/08/2017

#### Assessment and Planning Self-Evaluation

Kathryn Lopez

Job Title: Project Manager | Manager: Eran Arbel  
Document Type: Assessment and Planning | Period: 07/01/2016 - 06/30/2017  
Template: Employee Out of Unit | Document ID: 17410  
Status: Evaluation in Progress | Due Date: 07/28/2017

#### Employee Data

Empl ID: 0000000 | 33529000 - Project Manager  
Department: 156300000 | Talent Management and Develop  
Years of Service: 8 Years | 9 Months

Review Date: 08/16/2017 | Related Content

[Expand All](#) | [Collapse All](#) | [Calculate All Ratings](#)

### Steps and Tasks

On the left of the document employees have the ability to track their progress and see what steps are next in the process.

Performance Process

#### Steps and Tasks

Kathryn Lopez  
Assessment and Planning  
07/01/2016 - 06/30/2017 Overview

- Complete Self Evaluation  
Due Date 07/28/2017  
[Update and Complete](#)
- Review Manager Evaluation  
Due Date 09/08/2017  
Review with Manager  
Acknowledge  
View

Performance Process

#### Steps and Tasks

Kathryn Lopez  
Assessment and Planning  
07/01/2016 - 06/30/2017 Overview

- Complete Self Evaluation  
Due Date 07/28/2017  
View
- Review Manager Evaluation  
Due Date 09/08/2017  
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Performance Process

#### Steps and Tasks

Kathryn Lopez  
Assessment and Planning  
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- Complete Self Evaluation  
Due Date 07/28/2017
- Review Manager Evaluation  
Due Date 09/08/2017  
Review with Manager  
[Acknowledge](#)  
View

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

All goals set in the most recent completed PEP will roll over to the current document. These goals can be edited and rated.

### ▼ Section 1 - Past Year's Goals & Achievements

TIP: Click Expand All before starting.

This section contains goals written in last year's Manager PEP. If additional goals were assigned during last year, managers can simply add them by clicking the Add Item link. Employees may make note of additional accomplishments by entering comments in the Past Year's Goals & Achievements Summary section. Rate and comment on the performance for each goal. Managers may also enter its Status and Percent Complete. When an employee has completed the self-evaluation, the employee ratings and comments will be visible for reference to the manager. The manager is responsible for entering final goals and achievements.

TIP: Include documents by using the Attach Documents link at the end of the PEP.

[Click here for further instructions](#)

☑ Expand | ☑ Collapse

▶ 2016-2017 Goals

▶ 2016-2017 Goals

Expand each goal to enter a progress rating and supporting comments.

☑ Expand | ☑ Collapse

▼ 2016-2017 Goals

- Status:
- Percent Complete: 0

Employee Rating:

Employee Comments

Writing Tools

Additional goals set and accomplishments achieved during the past fiscal year may be noted in the Past Year's Goals & Achievements Summary section.

☑ Expand | ☑ Collapse

▶ 2016-2017 Goals

▶ 2016-2017 Goals

Past Year's Goals & Achievements Summary

Employee Comments

## Step 6: Competencies

You will then rate yourself and enter comments for each of the competencies.

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

### ▼ Section 2 - Competencies


Assess each Competency using the rating scale provided. Include comments and examples to support the ratings that exceed or fall short of expectations. A rating of "3 - Fully Meets" DOES NOT require comments.

▼ Expand | ▶ Collapse

▶ Job Knowledge

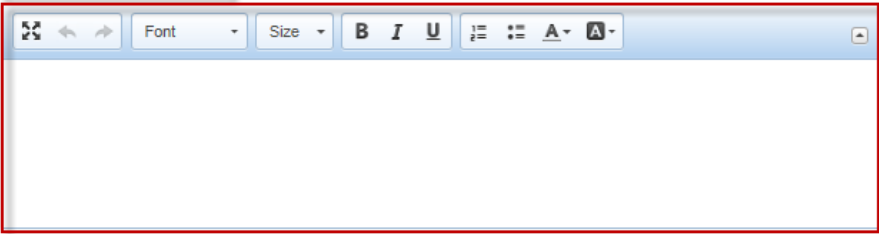
▼ Service Excellence

Description : Effectively provides expertise and exceptional service to students, faculty, and staff; demonstrates courtesy and respect; shows empathy; anticipates needs and prevents potential problems; works effectively across departments.

Employee Rating:  

Employee Comments:

Writing Tools



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▶ Accountability

▶ Communication and Interpersonal Skills

▶ Efficiency

## Step 7: Goals for Next Year

You may enter suggested goals for the next fiscal year in this section.

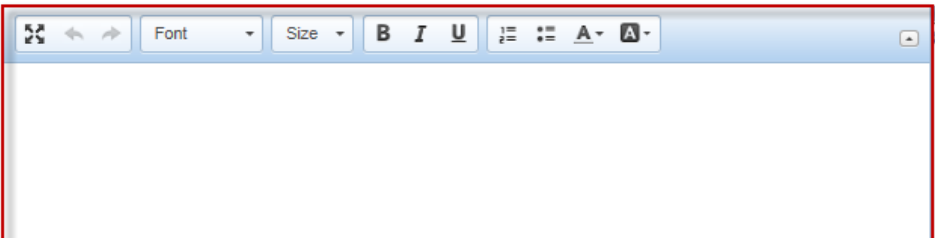
### ▼ Section 3 - Goals for Next Year

Goal setting is the key to managing the work done in your Department. When an employee has completed the self-review, the employee-suggested goals will be visible for reference to the manager. The manager is responsible for setting and entering final goals.

TIP: Add each goal as an individual action item, with criteria for its completion and a target date.

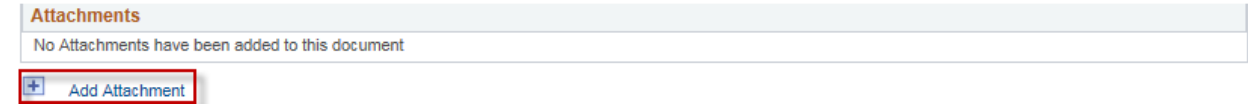
Goals for Next Year - Employee Self Evaluation

Employee Comments



## Step 8: Attachments

You may attach supporting documentation to your Self-Evaluation. Attachments may be in the form of .pdf, .docx, or .jpg files.



## Step 9: Complete Document

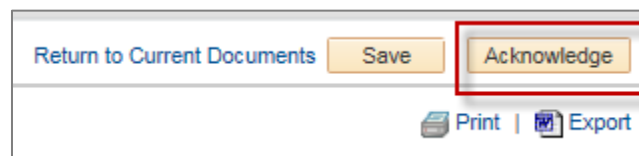
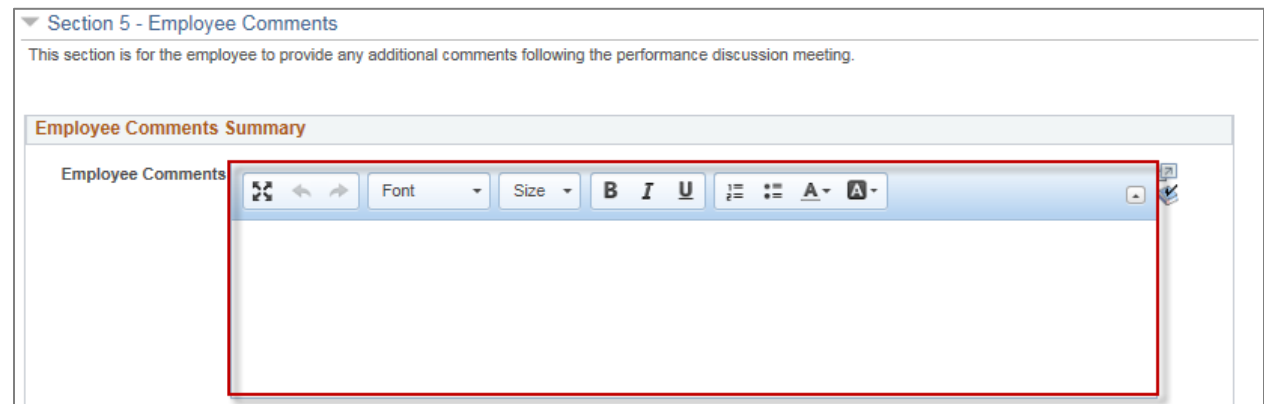
Once you have completed your self-evaluation, and you are ready for your manager to review, click on Complete. A notification will be sent to your manager alerting them that your self-evaluation is ready for their review. Please note that your manager will be able to view the information you enter, only when you have marked the document Complete.



## Step 10: Employee Comments and Acknowledgment

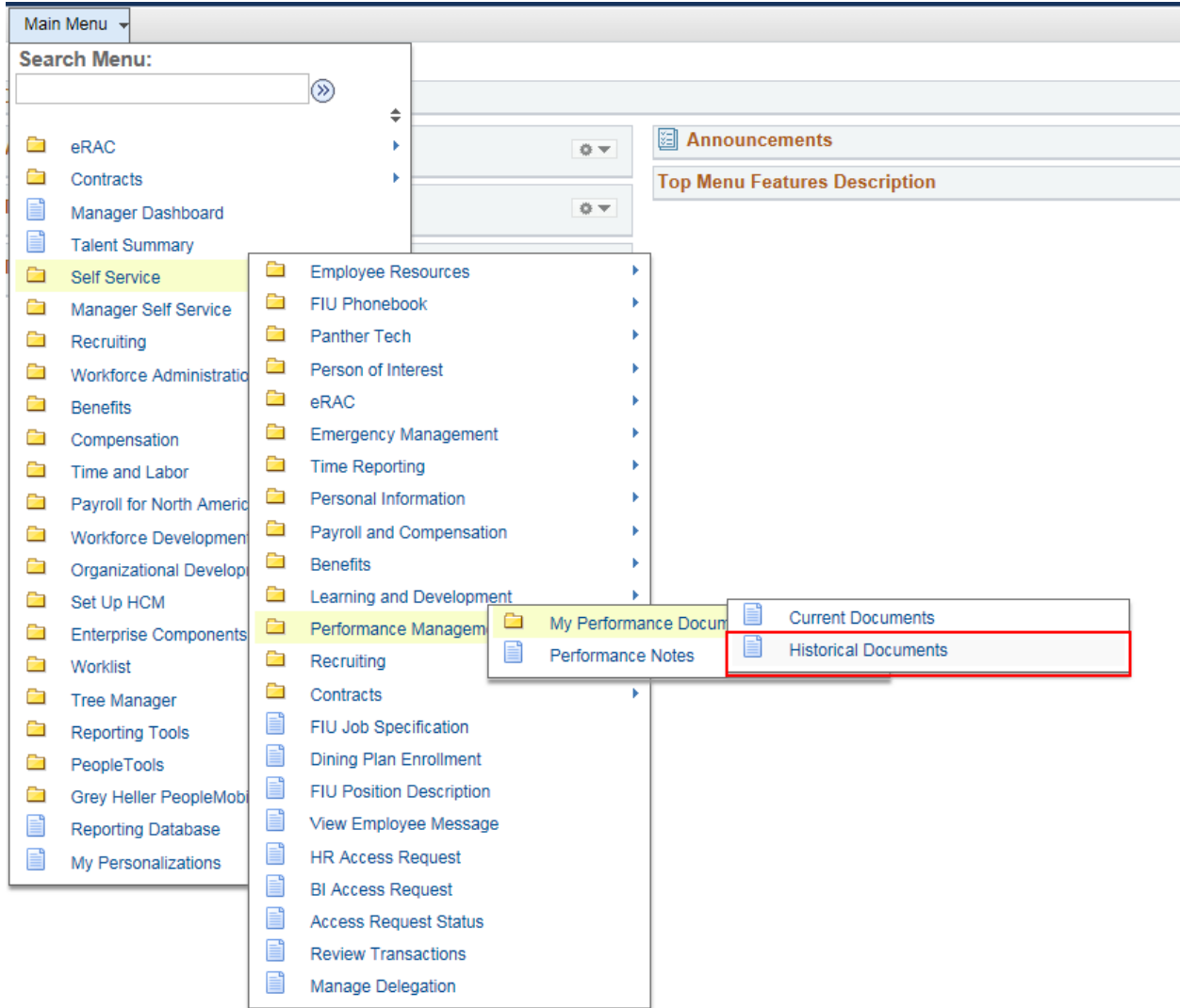
Once you and your manager have met to discuss your performance, your manager will enter the Review Date and Request Acknowledgment. At that point you will receive a notification to Acknowledge your performance review. Your acknowledgement does not necessarily mean that you agree, but affirms that the evaluation meeting was held and your performance was discussed in detail with you.

Before you acknowledge, you have the opportunity to add comments in Section 5 of the Manager Evaluation.



## Step 11: Historical Documents

Once the document is approved you will receive a notification from PantherSoft. The Assessment and Planning document will be finalized and may be accessed in Historical Documents.



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