PEP Instructions for Supervisors

**Step 1: Login**

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

![Image of MyHR.FIU.edu login page]

**Step 2: Access Employee Documents**

Access your employees’ documents, using the Manager Self-Service path from the Main Menu.

![Image of MyHR.FIU.edu Main Menu]

- **Self Service**
  - Manager Self Service
    - Performance Management
      - Performance Document
        - Approve Documents
          - Maintain Performance Notes
Step 3: Select Employee Document

Access each individual PEP document by clicking on the link as shown below.

Step 4: Start Manager Evaluation

Click Expand All and begin writing your employee’s PEP document.

Note: you do not need to wait until your employees have completed their Self Evaluations to begin your Manager Evaluation.
Steps and Tasks

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

You can also click the link under Review Self Evaluation to view an employee’s Self Evaluation.
Related Content

Click the Related Content link.

The screen will split and you can access any of the Employee or Manager Evaluations from Current Documents or Historical Documents.

Calculate Ratings

At any time you can scroll to the top of the document to Calculate All Ratings
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 Add Item 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.
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, use the Override link, then substantiate the change in the Manager Comments.
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”) 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. 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 Assessment
   - 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 in your Historical Documents.

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