

PEP Instructions for Supervisors

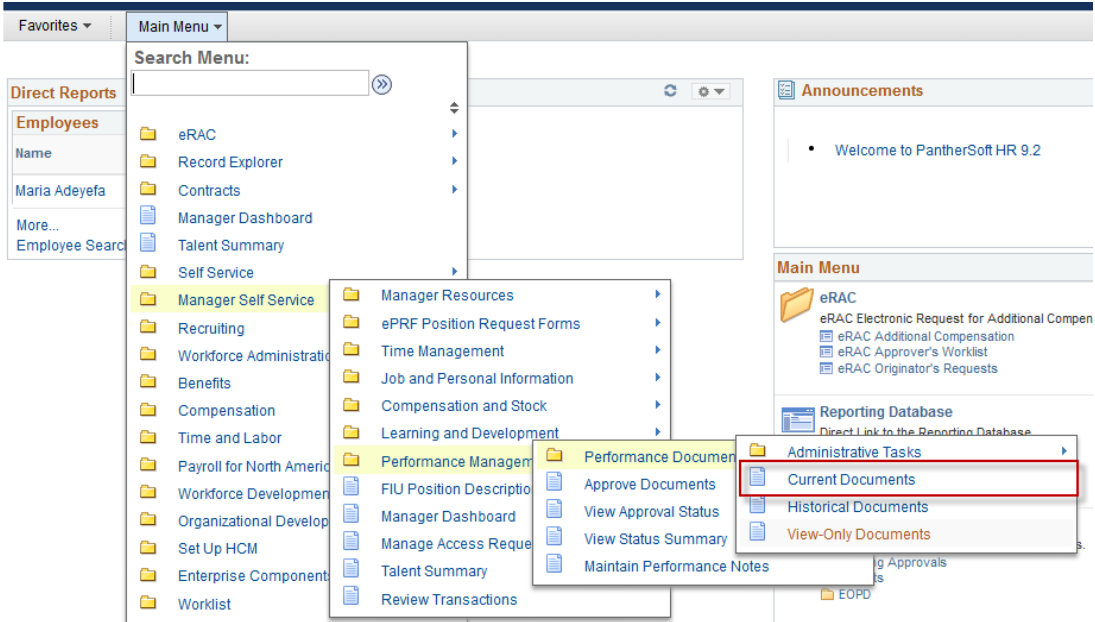
Step 1: Login

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



Step 2: Access Employee Documents

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



Step 3: Select Employee Document

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

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

▶ Filter Criteria

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
0000000	Kathryn Lopez	Assessment and Planning	Evaluation in Progress	07/01/2016	06/30/2017	Project Manager	09/08/2017

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.

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

Performance Process Assessment and Planning Return to Current Documents Save Share with Employee

Steps and Tasks

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

- Review Self Evaluation Due Date 07/28/2017
- Complete Manager Evaluation Due Date 09/08/2017
 - Update and Share
 - Request Acknowledgement
 - Pending Acknowledgement
 - Submit for Approval
 - Pending Approval
 - Complete

Manager Evaluation

Kathryn Lopez

Job Title Project Manager
Document Type Assessment and Planning
Template Employee Out of Unit
Status Evaluation in Progress

Manager Eran Arbel
Period 07/01/2016 - 06/30/2017
Document ID 17410
Due Date 09/08/2017

Employee Data

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

Review Date Related Content

Expand All Collapse All Calculate All Ratings

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.

The screenshot shows a user interface for a 'Performance Process' for Kathryn Lopez. The process is titled 'Assessment and Planning' and runs from 07/01/2016 to 06/30/2017. There are two main task items:

- Review Self Evaluation**: Due Date 07/28/2017. A 'View' link is present below this item.
- Complete Manager Evaluation**: Due Date 09/08/2017. A dropdown menu is open, showing the following steps: 'Update and Share' (highlighted in yellow), 'Request Acknowledgement', 'Pending Acknowledgement', 'Submit for Approval', 'Pending Approval', and 'Complete'.

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

This is a close-up of the 'Review Self Evaluation' task item. It shows a dropdown arrow icon, a green checkmark, the text 'Review Self Evaluation', and the due date '06/30/2015'. Below the due date is a blue 'View' link, which is pointed to by a red arrow.

Related Content

Click the Related Content link.

Review Date [Related Content](#)

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

The screenshot displays a performance evaluation interface. On the left, a sidebar titled 'Steps and Tasks' lists various stages of the evaluation process, with 'Update and Share' highlighted. The main content area shows details for a 'Manager Evaluation' for Kathryn Lopez, including her job title (Project Manager), document type (Assessment and Planning), and manager (Erin Arbel). Below this, there is an 'Employee Data' section with fields for Employee ID, Department, and Years of Service. A 'Review Date' field is set to 08/18/2017, and a 'Related Content' link is visible. The interface also features a 'Section 1 - Past Year's Goals & Achievements' section with a tip to click 'Expand All' before starting. At the bottom, a 'Related Content' section contains a 'Performance Document History' table with columns for Employee ID, Name, Document Type, Document Status, Period Begin, Period End, Job Title, and Rating. The table lists two documents, with the second one for Kathryn Lopez highlighted by a red arrow.

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Rating
1374927	Joliet Vega-Kucevsek	Assessment and Planning	Completed	07/01/2015	06/30/2016	Learning Prof Dev Specialist	4 - Consistently Exceeds
2670386	Kathryn Lopez	Assessment and Planning	Completed	07/01/2015	06/30/2016	Project Manager	4 - Consistently Exceeds

Calculate Ratings

At any time you can scroll to the top of the document to Calculate All Ratings

[Expand All](#) | [Collapse All](#) | [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.

▼ 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 | **Add Item**

▶ 2016-2017 Goal #1

▶ 2016-2017 Goal #2

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.

Add Your Own Item

*Title

Status

Percent Complete

Add

[Return](#)

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.

Expand | Collapse | Add Item

▼ 2016-2017 Goal #1

- Status: Complete
- Percent Complete: 100

Manager Rating **3 - Fully Meets** 3.00

Manager Comments

Writing Tools

Comments from last year's evaluation are transferred over and the manager can comment here.

Employee Rating **3 - Fully Meets**

Employee Comments

Employee's comments will appear here.

Created By Lisa Brill 09/28/2016 2:42PM
Last Modified By Lisa Brill 06/20/2017 10:21AM

► 2016-2017 Goal # 2

Past Year's Goals & Achievements Summary

Manager Rating 0.00

Employee Comments

Employee's comments will appear here.

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!**

▼ 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**

Description : Uses knowledge and expertise acquired through education, training, and experience; remains current in field and related technologies and practices; competently performs all duties in the position description.

Manager Rating **3 - Fully Meets** 3.00

Manager Comments:

Writing Tools

Manager comment goes here.

Employee Rating 3 - Fully Meets

Employee Comments



Employee comment goes here.

Created By Template 05/18/2016 12:57PM

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.

▼ Section 3 - Overall Summary

Manager Rating 3 - Fully Meets ← **3.20**   [Override](#)

Manager Comments:

Writing Tools

Manager comment goes here.

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.

▼ Section 4 - 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.

◅ Expand | ◅ Collapse |  Add Item

▶ Continue Board Prep

▶ Upgrade Departmental Approval Process

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

Goals for Next Year - Employee Self Evaluation


Employee Comments

Step 9: Attachments

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

Attachments

No Attachments have been added to this document

 Add Attachment

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

|

Share with Employee

You have chosen to allow the employee and 2nd level supervisor to view this evaluation. To confirm they can view the evaluation select the OK button.

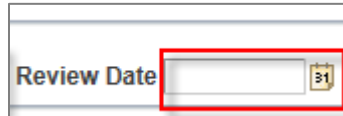
The overall rating you have assigned to this employee is 3 - Fully Meets.

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

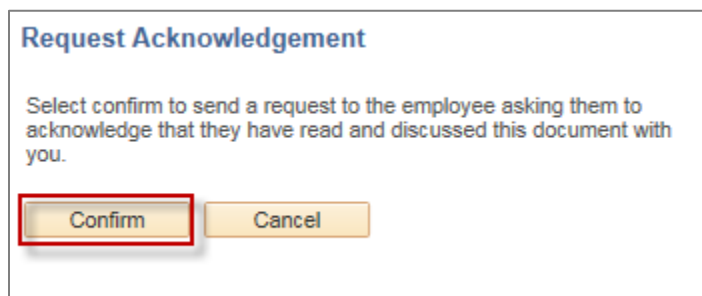
Once the performance discussion has been held, you may mark “Request Acknowledgment” and enter the date that the review occurred.



A screenshot of a web form showing a label 'Review Date' followed by an empty text input field. To the right of the input field is a small calendar icon. A red rectangular box highlights the input field.



A screenshot of two buttons: 'Save' and 'Request Acknowledgement'. The 'Request Acknowledgement' button is highlighted with a red rectangular box.



A screenshot of a dialog box titled 'Request Acknowledgement'. The text inside reads: 'Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.' Below the text are two buttons: 'Confirm' and 'Cancel'. The 'Confirm' button is highlighted with a red rectangular box.

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.

The screenshot shows the 'Performance Process' interface. On the left, the 'Steps and Tasks' sidebar lists several steps, with 'Submit for Approval' highlighted in yellow and a red arrow pointing to it. The main content area displays 'Manager Evaluation' for Kathryn Lopez, including her photo, job title (Project Manager), and manager (Eran Arbel). A modal dialog box titled 'Submit for Approval' is open, with the following text: 'Select confirm to submit this document for approval. Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.' Below the text are two buttons: 'Confirm' (highlighted with a red box) and 'Cancel'.

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.

The screenshot shows the FIU Main Menu. The 'Performance Documents' sub-menu is open, and 'Historical Documents' is highlighted with a red box. Other sub-menu items include 'Approve Documents', 'View Approval Status', and 'Maintain Performance'. The 'Performance Documents' sub-menu is also highlighted with a red box.

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.