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 document by using the Team Performance tile from your MyHR.FIU.edu Manager Home Page.
Step 3: Select Employee Document

Access each individual PEP document by clicking on the box 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.

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.

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

Past Goal 1

Past 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.
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.

**Request Acknowledgement**

Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.
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.