PEP Overview Webinar

2017-18 Review Cycle

July 2018
Your Speaker Today

Eran Arbel
Assistant Director
Talent Acquisition and Management
Adobe Connect Functionality
Why Are We Here?

- Performance Excellence Process (PEP)
- Your Role in the Process
- Aligning PEP with FIU’s Strategic Plan
- Online PEP Document
- Enhancements and New Features
- Resources and Training
- Professional Development Credit
PERFORMANCE EXCELLENCE PROCESS

Linking People to Outcomes
Aligning PEP with FIU’s Goals

• FIU BeyondPossible2020 Strategic Plan
• Specific Goals with Specific Measures
• Important to align PEP with University’s Strategic Plan
• Funding Model Based on Performance of Each University in the Florida SUS
• Competing with Other Universities
Performance Excellence Process (PEP)

2nd Level Manager Approval

Formal Review Meeting

Supervisor Completes Manager Evaluation

Supervisor Reviews Employee Self-Evaluation

Employee Completes Self-Evaluation

Employee and Supervisor Gather Information

Formal tool to review achievements, provide candid feedback and set measurable goals aligned with FIU’s Strategic Plan
# Your Role in the PEP Cycle

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Timeline

July
- 7/22: PantherSoft System Updated
- 7/30: Documents Available on PantherSoft
- 7/31 and 8/2: PEP Webinar

August
- 8/17: Employee Documents Should be Completed
- 8/22: Performance Management Workshop (For Managers)

September
- 9/11: Performance Management Workshop (For Managers)
- 9/17: Manager Documents Should be Completed
- 9/30: 2nd Level Approval
- Document Deadline
THE SYSTEM
PantherSoft HR: Online PEP
Myhr.fiu.edu
One-Click Access

- Employee

- Announcements
  - No current announcements.

- Personal Details
  - Empl ID: 1234567

- Time

- Pending Approvals

- Tax Information

- Payroll and Compensation
  - Last Pay Date: 05/25/2018

- Pay
  - Last Pay Date: 05/25/2018

- Performance
  - Next Due Date: 08/15/2018

- Total Rewards
  - Total Rewards Statement: 2018

- Benefit Details

- Tuition Waiver

- Recruiting

- Access Request

- Manage Delegations

- Employee Resources

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Florida International University
Division of Human Resources
One-Click Access

Announcements
- Issues accessing your PEP in My.fiu.edu

Pending Approvals

Team Time

Employee Snapshot

My Team

Team Performance
- 1 In Progress Documents

Manage Recruitment

Learning & Development
ePRF Position Request Forms

View Total Rewards

Position Description
Employee Self Evaluation
Manager Evaluation

**Assessment and Planning**

**Manager Evaluation**

**Kathryn Lopez**

**Actions**

- **Job Title**: Project Manager
- **Manager**: Eran Arbel
- **Document Type**: Assessment and Planning
- **Period**: 07/01/2017 - 06/30/2018
- **Template**: Managers Out of Unit
- **Status**: Evaluation in Progress
- **Document ID**: 18624
- **Due Date**: 09/17/2018

**Employee Data**

- **Employee ID**: 33629000 - Project Manager
- **Department**: 156300000 - Talent Management and Develop
- **Years of Service**: 9 Years
- **Years in Job**: 2 Years

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

**Ratings from past 2 years**

**Review Date**: 07/24/2018

- Expand All | Collapse All | Expand Section | Calculate All Ratings

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**FIU**

**Division of Human Resources**
Past Year’s Goals: Employee Document

Any additional goals or accomplishments that the employee wishes to add would go here.
Past Year’s Goals: Manager Document

2016-2017 Goal #1

- Status: Complete
- Percent Complete: 100

Manager Rating: 3 - Fully Meets

Manager Comments:
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.
Competencies

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.

Employee Rating: 3 - Fully Meets

Employee Comments: Enter comments here.

Writing Tools

Service Excellence

Compliance and Accountability

Communication and Interpersonal Skills

Efficiency
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.

**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**

- Rating: 3 - Fully Meets
- Rating: 3.00

**Manager Comments**

Manager comment goes here.

**Employee Rating**

- Rating: 3 - Fully Meets

**Employee Comments**

Employee comment goes here.
Overall Summary Calculation

Section 1 - Past Year's Goals & Achievements

2016-2017 Goals

Past Year's Goals & Achievements Summary

Manager Rating: 3.00

Employee Comments

Section 2 - Competencies

Job Knowledge
Service Excellence
Compliance and Accountability
Communication and Interpersonal Skills
Efficiency

Competencies Summary

Manager Rating: 3 - Fully Meets: 3.40
Overall Summary

Section 3 - Overall Summary

TIP: Note that the Overall Rating is calculated based on goals and competencies ratings. To change the summary rating, use the Override link, then substantiate the change in the Manager Comments.
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

Goal 1 - Employee enters goal here
- Specific
- Measurable
- Deliverable

Goal 2 - Employee enters second goal here
- Specific

Attachments
No Attachments have been added to this document

Add Attachment
Goals for Next Year: Manager Document

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

2018-2019 Goal 1

2018-2019 Goal 2

Goals for Next Year - Employee Self Evaluation

Employee Comments

Goal 1 - Employee enters goal here
- Specific
- Measurable

Goal 2 - Employee can enter as many goals as they want
## Attachments

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Attachment Audience</th>
<th>Last Update Date/Time</th>
<th>Uploaded By</th>
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</thead>
<tbody>
<tr>
<td>PDF_Document.pdf</td>
<td>Course Certificate</td>
<td>Employee and Manage</td>
<td>06/23/2017 11:55:17AM</td>
<td>Kathryn Lopez</td>
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<tr>
<td>Word_Document.docx</td>
<td>Recognition Letter</td>
<td>Employee and Manage</td>
<td>06/23/2017 11:55:10AM</td>
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[Add Attachment]
Email Notifications

Email Notifications Will Guide Next Steps and Show Status

This automatic notification is to alert you that PEP documents for the period between 07/01/2016 and 06/30/2017 are now open to begin evaluating employees.

(Note: any current or historical documents can also be viewed on a split screen while writing an evaluation by clicking on the "Related Content" link.)

Select this link to access current documents:
https://myhr.fiu.edu/psp/hrm/0/EMPLOYEE/HRMS/c/ROLE_MANAGER.EM_CURRENT.EMP_PRF.GBL

PEP documents are now available for the following employees:
Jaede Brereton (1569655)

Below is this document's status: [X] = Completed Steps; [O] = Next PEP Action Step

[O] Start
[ ] Share with Employee
[ ] Enter Review Date/Request Acknowledgment
[ ] Employee Acknowledge
[ ] Submit for Approval
[ ] 2nd Level Approve

If you have any questions or require assistance, please contact HR Customer Service at 305-348-2181.
Workflow

1. Employee Completes Self-Evaluation
2. Supervisor Writes Evaluation
3. Supervisor & 2nd Level Discussion
4. Supervisor Shares with Employee
5. Request Acknowledgement
6. Hold Performance Review
7. Employee Acknowledges
8. Manager Submits for Approval
9. 2nd Level Approves
Manager Evaluation

Kathryn Lopez

**Job Title**: Project Manager

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**Years in Job**: 2 Years 9 Months

**Rating History**: 07/24/2018

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

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

### Section 2 - Competencies
Employee Actions

- Enter Comments
- Acknowledge Review
Submit for Approval
Second Level Approver

To View Manager Evaluation
Historical Documents
RESOURCES AND TRAINING
PEP Toolkit

hr.fiu.edu

- Step-by-Step Instructions for:
  - Employees
  - Supervisors
  - 2nd Level Approvers
- PEP Definitions (ratings and competencies)
- Goal Setting Template
- How to Clear Cache Instructions
- Webinar Recording/Slides
- Preparation Document Template
Training

Computer Labs by Department Request
  • August-September
  • Hands on system assistance

Online Performance Management Courses
  • Available now
  • FIU.Skillport.com
  • AD Credentials

Performance Management Workshops for Managers
  • August - September
  • Register at: profdev.fiu.edu
2017-18 Review Cycle

- PEP Documents LIVE – July 30th
- Submission Deadline – September 30th
Getting Credit for Attending Today

- Go to: go.fiu.edu/PEPWebinar
- Complete PEP 2017-18 Webinar Survey
- Include your My Accounts Username
- Webinar Date
- Viewing the recording counts
We Are Here for You!

- Human Resources Service Center – 305-348-2181
- Talent Acquisition and Management– 305-348-3206 or by email at TAM@fiu.edu
- Hr.fiu.edu
THANK YOU!