
Quick Guide

► EVALUATION CYCLE



► LOG-IN

1. Access PeopleAdmin from a browser window <http://jobs.cofc.edu/hr/sso>
 2. Verify correct information
 - a. Incorrect information – email epms@cofc.edu
 - b. Note: Job duties may not be changed at this point, email epms@cofc.edu for instructions
 3. Access Employee Portal (upper right corner under drop-down of module choices)
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► HOME SCREEN

1. Action Items will list any task that is due
 2. My Reviews will access dashboard for your personal evaluation
 3. My Employee Reviews will access dashboard for all of your employee evaluations
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► STEP 1 AND 2 PLAN

1. The Plan and Goal Setting start the new evaluation period.
2. After the prior year evaluation is completed, the supervisor will open the Plan to populate goals, and the employee will acknowledge the Plan consisting of. The goals will then populate into the evaluation.
3. Goals may be revised during the year.

▶ STEP 3 – SELF- EVALUATION

Note – If supervisor approves, the self-evaluation step may be by-passed

1. Employee provides verbiage for each item under each tab:
 - a. Values and Characteristics
 - b. Job Duties
 - c. Strengths and Accomplishments
 - d. Goals
 - e. Overall Comments
2. Save Draft Often and when complete, select “Complete” at the top under blue Action button or at the bottom

IMPORTANT: once completed, the supervisor cannot send it back to the employee

▶ STEP 4 – SUPERVISOR EVALUATION

1. Supervisor may copy and paste employee self-evaluation or provide their own verbiage
 2. Supervisor selects ratings from dropdown
 3. SUPERVISOR completes the OVERALL RATING!
 4. Supervisor sends evaluation to Reviewing Officer by selecting “Complete” under blue Action button at the top or at the bottom
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▶ STEP 5 – REVIEWING OFFICER APPROVES EVALUATION

1. Reviewing Officer may “Accept” or “Reject” the evaluation with notes
2. Notes should be very simple (i.e. call for discussion of overall rating or call for discussion of job duty). There should be a meaningful consensus discussion.
3. IMPORTANT...Notes are at the very bottom...scroll down below employee comments
4. If Reviewing Officer “Rejects”, the evaluation will go back to supervisor’s Action Items for revision

▶ **STEP 6A AND B–SUPERVISOR AND EMPLOYEE ACKNOWLEDGE MEETING**

1. Supervisor and Employee meet to discuss evaluation and preliminary goals for next year
 2. Both Supervisor (first) and Employee acknowledge that the meeting has taken place
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▶ **GENERAL INFORMATION AND REMINDERS**

1. Contact epms@cofc.edu with any questions
2. Emails should alert any new actions (sometimes there may be more than one)
3. The evaluation will not be considered valid until **all actions** have been completed
4. Check all information carefully!
5. Do not forget the **OVERALL RATING!**
6. **DO NOT GET FRUSTRATED...**if you have a question, call (as long as it is before March 1)
7. **SAVE OFTEN**
8. **READ INSTRUCTIONS**