Screen Shot Guide – Step I: Supervisor Creates Plan

**EVALUATION CYCLE**

After the evaluation, the supervisor will create the Plan/Goals for the new year based on the evaluation meeting discussion. A new plan must be generated after a change in a Position Description.

**A) LOG-IN**

Enter [http://jobs.cofc.edu/hr/sso](http://jobs.cofc.edu/hr/sso) in a browser address bar

- Or log into mycharleston (my.cofc.edu)
  - Select Employee Tab
  - Look for PeopleAdmin under Quick Links

Log-in with the same name and password that you use to log into your computer

**B) ACCESS EMPLOYEE PORTAL**

1. **Change Module to Performance Management**
2. **Change Role to Employee and refresh**
3. **Go to College of Charleston Employee Portal**

**ACTIONS AT A GLANCE**

- Log In………………………………A
- Access Employee Portal………..B
- Access The Plan…………………..C
- Review Position Information…….D
- Select Individual Goal Tab……….E
- Populate Individual Goals………..F
- Add Progress Notes……………...G
- Log Out……………………………..H
- Next (Emp. Acknowledges Plan)….I
**C) ACCESS THE PLAN**

1. Select "Creates Plan" and complete for every employee (see E)

**D) REVIEW POSITION INFORMATION**

1. READ ALL INSTRUCTIONS
2. Select and Review
   - Overview
   - Values and Characteristics
   - *Job Duties

*If there are Position Description discrepancies, go to the Position Description Module and begin the process of Updating the Position Description

**E) OPEN THE INDIVIDUAL GOALS**

1. Select Individual Goals Tab
F) POPULATE THE INDIVIDUAL GOALS

1. Enter the name and description of the goal
2. Add entries as necessary
3. Remove entries as necessary
4. Save or Complete (a warning will appear at the top of the screen to ask if “you are sure you want to complete”)

G) PROGRESS NOTES AND REVISIONS

1. Select Progress Notes to make confidential notes during the year
2. Select Actions to update or revise the plan

H) LOG OUT

1. Select “Log Out”
1) NEXT STEP

a) Employees should receive an email asking them to acknowledge the plan.