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 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. Access Portal
   College of Charleston
   Employee Portal

   Welcome to your Online Recruitment System

   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.