Screen Shot Guide – Step I: Supervisor Creates Plan



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	ACTIONS AT A GLANCE
Enter <u>http://jobs.cofc.edu/hr/sso</u> in a browser address bar	Log InA Access Employee PortalB
 Or log into mycharleston (my.cofc.edu) Select Employee Tab Look for PeopleAdmin under Quick Links 	Access The PlanC Review Position InformationD Select Individual Goal TabE Populate Individual GoalsF
Log-in with the same name and password that you use to log into your computer	Add Progress NotesG Log OutH Next (Emp. Acknowledges Plan)I

B) ACCESS EMPLOYEE PORTAL

1. Access Portal College of	COLLEGE of CHARLESTON Wanted Data Strategy (CHARLESTON) Home My Profile Help Lind McCimarbas surface (Charleston)	eopleAdmin PERFORMANCE • to to College of hardeston Employee ortal over
Charleston Employee	Welcome to your Online Recruitment System	
Portal	Linbox (0 Items need your attention) Shortcuts Displaying items for group "Engloyee".	
	My Linis Useful Links	

► C) ACCESS THE PLAN

1.	Select "Creates Plan"	COLLEGE of CHARLESTON	Home (1) Performance -		Go to College of Charleston Hi Hoto, Edward B.	R Sile Peop My Account	leAdmin Log Out
and complete for every	Penumance My Reviews My Employees' Reviews	Welcome to the Employee	Portal, Edward B. Pope		©**	ip for this gape	
	(see E)		Program for Dee Cole	Description - Supervisor Creates Flan	Due Date - n/a	Status -	Action
			Program for Linda McClenaghan	Supervisor Creates Plan	r/a	Acaitable	Vew

D) REVIEW POSITION INFORMATION

		COLLEGE				Go to College of Charleston HR Site PeopleAdmin
1.	READ ALL	CHARLESTON	Home 🛐 Performa	nco -		Hello, Edward B. My Ascount Log Out
	INSTRUCTIONS	Linda McClenaghan Mary Director	ANNUAL R	EVIEW PROGRAM		O Help for the party
2.	Select and	Supervisor Edward B. Pope	Evaluation Type: Program Timeframe: Co-reviewer:	Focal 09/00/13 to - Add Contextenter	Review Status: Last Updated: Next Step:	December 05, 2013 15:50 Supervisor Creates Plan
	Review	Department College of Charleston	Plan for Linda Mc	Clenaghan		Actions *
	-Overview	Overview Plan	As a supervisor, it is now t will be successful in their r	ame to create the Performance Plan for your em role	playees. This plan allows the supervisor and the emp	iovee to set and understand clear expectations of how the employee
	Characteristics	Supervisor Evaluation Self Evaluation	Consider have created the	e Performance Plan, the Employee will be given	the plan to acknowledge that they have received the p	lan .
	-*Job Duties	Progress Notes History	Overview Values and 0	Characteristics Joh Dutes Individual Gos	ds	
		 My Reviews My Employees' Reviews 	Performance Planning oc conversation between an	curs at the beginning of a review period. It employee and supervisor.	will also ideally occur any time performance ex	pectations change. Performance Filinning fakes place through a

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

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E) OPEN THE INDIVIDUAL GOALS

1 Soloct	COLLEGE				Go to College of Charleston HR Site	PeopleAdmin
I. Select	CHARLESTON	ne 🚳 🛛 Performan	16e -		Hello, Edward B. M	y Account Log Out
Indivdual Goals						O Help for this page
Tab	inda cClenaghan A	NNUAL RI	EVIEW PROGRAM			
Sa Ed	pervisor Pro ward B. Pope Ce-	aluation Type: Igram Timeframe: -reviewer:	Focal Osr06/13 to - Add Contensioner	Review Status: Last Updated: Next Step:	December 05, 2013 15:50 Supervisor Creates Plan	
00	Rege of Conceston Pla	an for Linda McG	Clenaghan			Actions +
0	rerview Arr	a supervisor, it is now bi	me to create the Performance Plan for your employees. T	his plan allows the supervisor and the emp	ioyee to set and understand clear expectations of	how the employee
Pia	in wit	be successful in their ro	de.			
Su	pervisor Evaluation One	ce you have created the	Personance Plan, the Employee will be given the plan to	acknowledge that they have received the p	<i>ka</i> n	
50	If Evaluation					
Pri	ogress Notes Ove	eview Values and C	haracteristics Job Duties Individual Goals			
н	Pur	oose				
2	My Reviews Porto	mance Planning occ	curs at the beginning of a nevtew period. It will also	deally occur any time performance ex	pectations change. Performance Plenning ta	skes pace through a
2	My Employees' Reviews Conve	rsation between an e	mpKiyee and supervisor.			

F) POPULATE THE INDIVIDUAL GOALS

		Plan	As a supervisor, it is now time to create the Performance Plan for your employees. This plan allows the supervisor and the employee to set and understand clear expectators of how the employee will be successful in their rate.
1.	Enter	Supervisor Evaluation	Once you have created the Performance Plan, the Employee will be given the plan to acknowledge that they have received the plan.
	the name and	Self Evaluation	
	description of	Progress Notes	Oveniex Values and Characteristics Job Duries Individual Goals
			Individual Goals
	the goal	Se My Reviews	
2.	Add	My Encloyees' Reviews	Individual Goal Name
	entries as		
	necessary		Individual Coal Description
2	Remove		
э.	Remove		
	entries as		Remvie Ertry?
	necessary		
4.	Save or Complete		Add Telty
	(a warning will		
	a warning will		Save Draft. C Complete
	appear at the top of		
	the screen to ask if "y	ou are sure y	ou want to complete"

►G) PROGRESS NOTES AND REVISIONS

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1. Select	CHARLESION	Home 🔝 Performance -		Hello, Edward B.	My Account Log C
Progress Notes	Linda McClenaghan	The Plan has been marked as complete			O Help for the
confidential notes	Training Director Supervisor	Annual Program			
during the year	Edward B. Pope Department College of Charleston	Evaluation Type: Focal Program Timefrance: 00/00/13 to - Co-teviewer: Add Contexter B	Review Status: Last Updated: Last Completed Step: View State	December 11, 2013 16 45 Supervisor Creates Plan	
2. Select	Overview Plan	Plan for Linda McClenaghan	reex and .	Engloyee Acadomedges Card	Action
Actions to update .	Supervisor Evaluation	Parpose			
or revise the plan	Progress Notes History	Performance Planning occurs at the beginning of a review period. It will also deally or employee and supervisor.	ccur any time performance expectations change	e Perlomance Planning takes place throu	igh a conversation between
	Se My Reviews				
	🕼 My Employees' Reviews	Instructions			

► H) LOG OUT

	COLLEGE of			Go to College of Charleston HR Site PeopleAd		
1. Select	CHARLESTON	Home 🛐 Performance -		Helio Edward B My Account		
"Log Out"——	Linda McClenaghan	Annual Program '		G Help for the		
	Supervisor Edward B. Pope	Evaluation Type: Focal Program Timeframe: 0000/13 to - Co-reviewer: Add Co-reviewer 🖀	Review Status: Last Updated: Next Step:	Open December 05, 2013 15:50 Supervisor Creates Plan		
	Department College of Charleston	Plan for Linda McClenaghan		Actio		
	Overview	As a supervisor, It is now time to create the Performance Plan for your employees. This plan allows the supervisor and the employee to set and understand clear expectations will be successful in their role. Once you have created the Performance Plan, the Employee will be given the plan to acknowledge that they have received the plan.				
	Plan					
	Supervisor Evaluation					
	Self Evaluation					
	Progress Notes	Overview Values and Characteristics Job Duties Individual Goals				
	History	Purpose				
	S My Reviews	Performance Planning occurs at the beginning of a review period. It will also	lso ideally occur any time performance e	expectations change. Performance Planning takes place through		

►I) NEXT STEP Co to College of Charleston HR Site PeopleAd COLLEGE of CHARLESTON a) Employees should receive Home (19) Performance -My. Linda McClenaghan an email Annual Program asking them to Ackknowledge The Plan Supervisor Edward B. Pope Evaluation Type: Program Timeframe: Focal 05/06/13 % Review Status Last Updated Last Complete 11, 2013 15:45 Plan for Linda McClena Purpose Performance Plan employee and sup-My En ees' Reviews Instructions