

# 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/ss0> 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

### 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

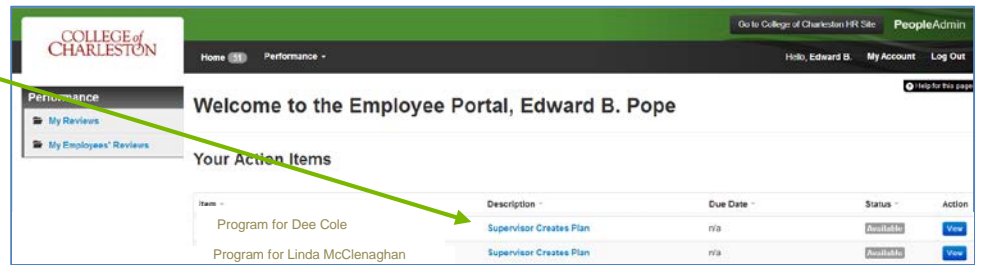
### ► B) ACCESS EMPLOYEE PORTAL

1. Access Portal  
College of Charleston  
Employee Portal



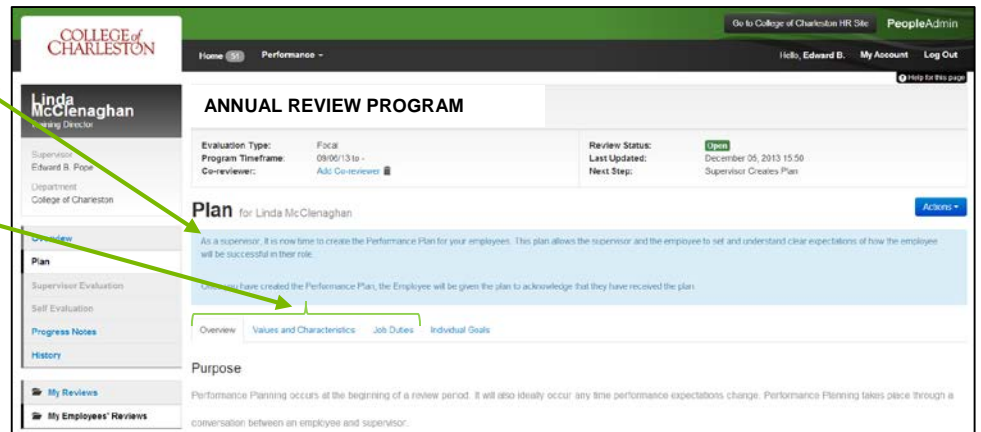
## ► C) ACCESS THE PLAN

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



## ► D) REVIEW POSITION INFORMATION

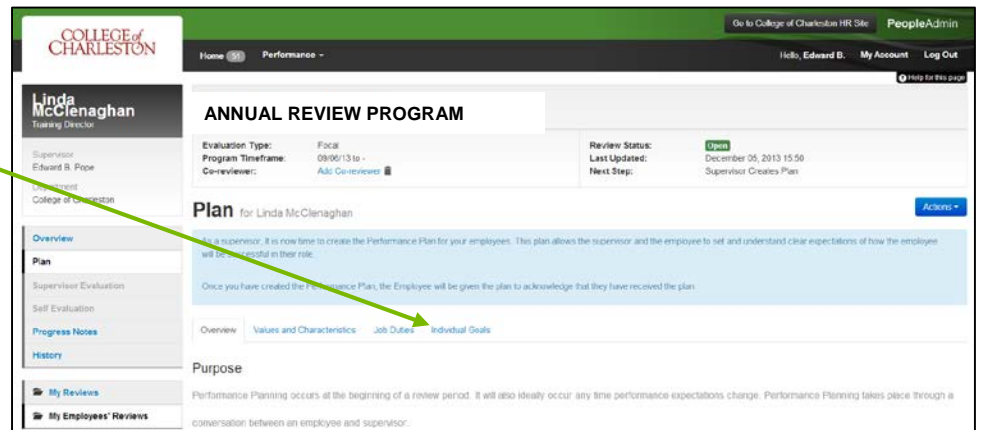
1. **READ ALL INSTRUCTIONS**
2. **Select and Review**
  - Overview
  - Values and Characteristics
  - \* Job Duties



\*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”

► I) NEXT STEP

- a) Employees should receive an email asking them to Acknowledge The Plan

