

Screen Shot Guide – Step 3: Self-Evaluation

► EVALUATION CYCLE



► 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

ACTIONS AT A GLANCE	
Log In.....	A
Access Employee Portal.....	B
Access Evaluation.....	C
Review Overview Tab.....	D
Comment on Values/Characteristics...	E
Comment on Job Duties.....	F
Skip Individual Goals.....	G
Complete Strengths.....	H
Skip Signatures.....	I
Add Attachments.....	J
Comment on Overall Performance..	K
Complete Evaluation.....	L
Log Out.....	M
Next (Supervisor Evaluation).....	N

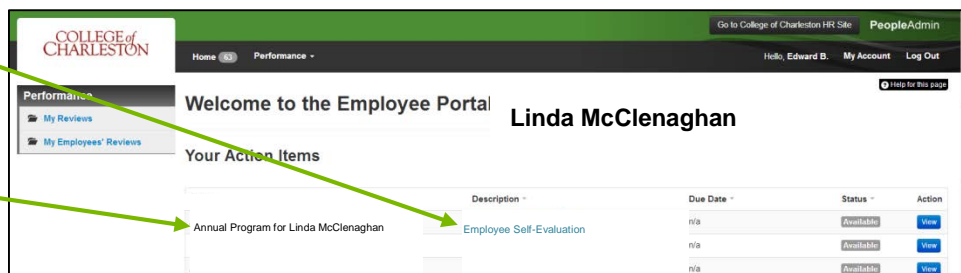
B) ACCESS EMPLOYEE PORTAL

1. Go to College of Charleston Employee Portal



► C) ACCESS THE EVALUATION FROM ACTION ITEMS

1. Select the “Action Item”
2. Ensure the correct program

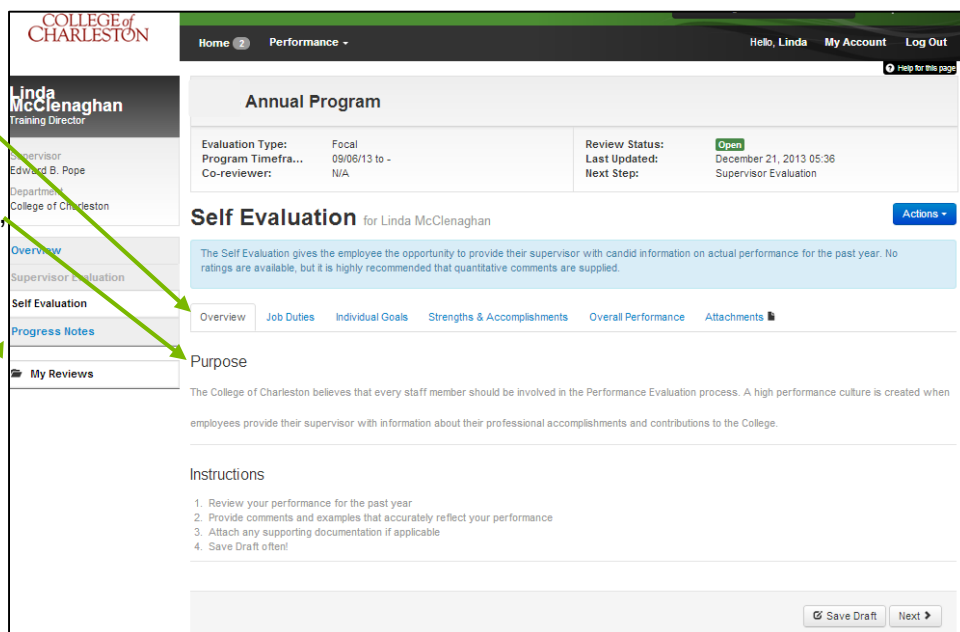


Note:

Evaluations may also be selected and viewed by selecting “My Reviews” from the left menu and selecting parameters

► D) ACCESS OVERVIEW TAB

1. Select Overview Tab
2. Read Blue Overview, Purpose, and Instructions,



Note: Progress Notes are confidential and may be added any time during the year. You may find it helpful to write notes during the year to assist in remembering accurate information when you access your self-evaluation.

► E) ACCESS VALUES AND CHARACTERISTICS TAB

1. **Select** Values/Char Tab
2. **Read** Notes
3. **Read** Each Description
4. **Write** Descriptive Comments
5. **SAVE DRAFT OFTEN!**

Annual Program

Evaluation Type:	Focal	Review Status:	Open
Program Timefra...	09/06/13 to -	Last Updated:	January 04, 2014 17:04
Co-reviewer:	N/A	Last Completed S...	Employee Acknowledges Plan
		Next Step:	Employee Self-Evaluation

Self Evaluation for Linda McClenaghan

The Self Evaluation gives the employee the opportunity to provide their supervisor with candid information on actual performance for the past year. No ratings are available, but it is highly recommended that quantitative comments are supplied.

Overview | **Values and Characteristics** | Job Duties | Individual Goals | Strengths & Accomplishments | Overall Performance | Attachments

The first seven Values and Characteristics are mandatory for all employees. The last two are only mandatory for employees with significant supervisory duties. Each Value/Characteristic should be applied based upon the position responsibilities.

Values and Characteristics Section

Value/Characteristic: Communication
Description: Demonstrates ability to express clear written and verbal thoughts, openly shares appropriate information, actively listens and seeks information. Participates in dept/division/committee meetings by sharing and assimilating information.

Comments

Value/Characteristic: Collaboration

► F) ACCESS JOB DUTIES

1. **Select** Job Duties Tab
2. **Read** Notes
3. **Read** Each Duty
4. **Write** Descriptive Comments
5. **SAVE DRAFT OFTEN**

Annual Program

Evaluation Type:	Focal	Review Status:	Open
Program Timefra...	09/06/13 to -	Last Updated:	January 04, 2014 17:04
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Overview | Values and Characteristics | **Job Duties** | Individual Goals | Strengths & Accomplishments | Overall Performance | Attachments

Job Duties are based on the current official Position Description. If the Position Description is inaccurate, contact EPMS@cofc.edu and provide specific information regarding the changes. Human Resources will contact you with instructions.

Job Duties

Job Duty:

1. Responsible for managing the planning, creation and delivery of training programs on a wide range of topics, to include but not limited to supervisory and managerial, customer service and technical procedures and processes. Collaborates with departmental leadership across campus to identify training needs and to develop necessary workshops and training. Works with departments to develop customized training and retreat agendas. Leads retreats and training as requested. Trains the trainers, develops materials and coaches when necessary.

Comments

►G) ACCESS INDIVIDUAL GOALS – AUTO POPULATED FROM PLAN

1. **Select**
Goals Tab
2. **Read**
Each Goal
3. **Write**
Descriptive
Comments
4. **SAVE DRAFT**
OFTEN

Annual Program

Supervisor: Linda McClenaghan (Training Director)

Evaluation Type: Focal
Program Timeframe: 03/04/14 to 03/15/15
Co-reviewer: Add Co-reviewer

Review Status: **Open**
Last Updated: January 09, 2015 09:55
Last Completed Step: Employee Self-Evaluation

Supervisor Evaluation for Linda McClenaghan (Score: Unrated)

The Supervisor Evaluation is the official evaluation once it has been approved and HARDCOPY SIGNED by the Reviewing Officer. After approval, you and your employee will meet to discuss performance and develop The Plan for the coming year.
The employee must log into the system to "acknowledge" the evaluation, AND THE SIGNED HARDCOPY MUST BE SENT TO HUMAN RESOURCES.

Overview | Values and Characteristics | Job Duties | **Individual Goals** | Strengths & Accomplishments | Overall Performance | Signatures | Attachments

Goals were developed at the beginning of the evaluation period during the Planning process.

Individual Goals

Individual Goal Name:
Documentation and Organization

Individual Goal Description:
Document all existing programs within the Training area. Clean out and organize programs, equipment and aids.

►H) ACCESS STRENGTHS AND ACCOMPLISHMENTS

1. **Select**
Strengths/Acc.
Tab
2. **Write**
Descriptive
Comments
3. **Add or Remove**
Entries
4. **SAVE DRAFT**
OFTEN

Annual Program

Supervisor: Linda McClenaghan (Training Director)

Evaluation Type: Focal
Program Timeframe: 05/05/13 to -
Co-reviewer: N/A

Review Status: **Open**
Last Updated: January 04, 2014 17:04
Last Completed Step: Employee Acknowledges Plan
Next Step: Employee Self-Evaluation

Self Evaluation for Linda McClenaghan

The Self Evaluation gives the employee the opportunity to provide their supervisor with candid information on actual performance for the past year. No ratings are available, but it is highly recommended that quantitative comments are supplied.

Overview | Values and Characteristics | Job Duties | Individual Goals | **Strengths & Accomplishments** | Overall Performance | Attachments

Strengths & Accomplishments

Strength & Accomplishment
Comments

Remove Entry?

Add Entry

Save Draft | Next

►I) SKIP *SIGNATURES TAB

►J) ADD *ATTACHMENTS

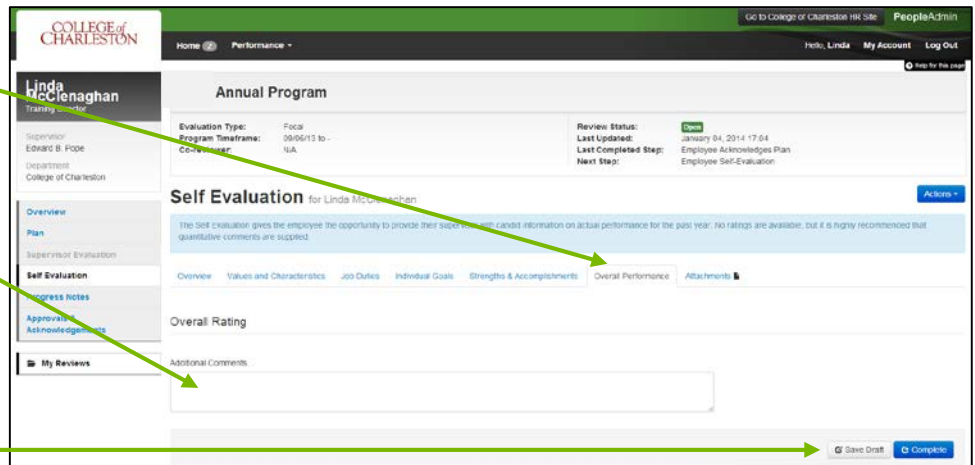
***IMPORTANT NOTE: IF YOU ADD ANY ATTACHMENTS, GO BACK TO THE OVERALL TAB TO COMPLETE THE EVALUATION!**

►K) ACCESS OVERALL PERFORMANCE

1. **Select**
Overall Perf.
Tab

2. **Write**
Descriptive
Overall
Performance
Comments

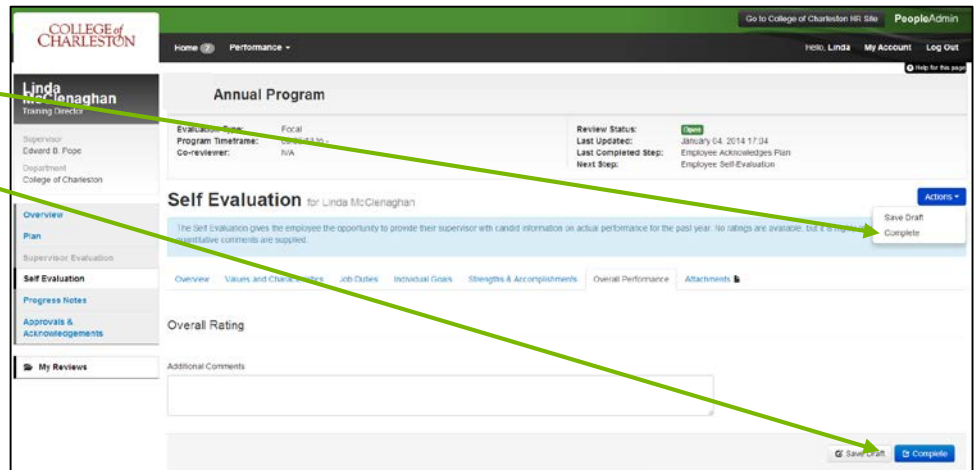
3. **SAVE DRAFT**
OFTEN



►L) COMPLETE SELF-EVALUATION (FROM OVERALL TAB)

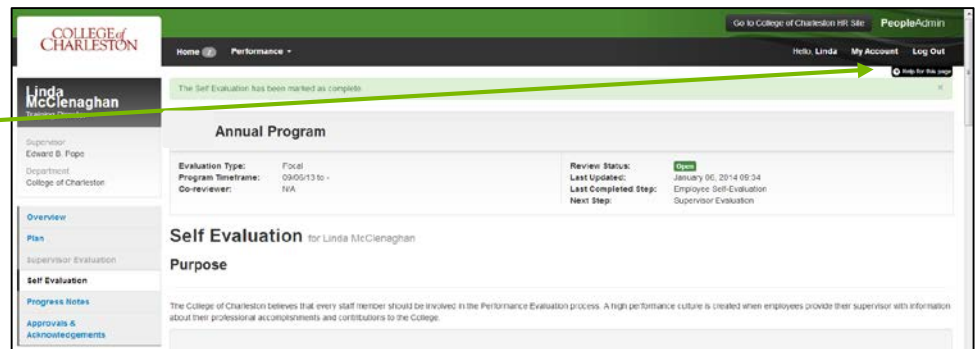
1. **Select**
Complete under
Action Dropdown
or at Bottom of
Page

2. **Select**
Ok in the box
that appears at
the top of the
evaluation



►M) LOG OUT

1. **Select**
“Log Out”



► N) NEXT STEP

1. Supervisor will review Self-Evaluation and Complete the Supervisor Evaluation

The screenshot shows a web application interface for a performance evaluation system. On the left is a sidebar for user 'Linda McClenaghan', Training Director, with supervisor 'Edward B. Pope' and department 'College of Charleston'. The sidebar has tabs for Overview, Plan, Self Evaluation, Progress Notes, Approvals & Acknowledgements, and My Reviews. The main content area shows a notification 'The Dof Evaluation has been marked as complete.' Below this is the 'Annual Program' section with fields for Evaluation Type (Final), Program Timeframe (09/06/13 to -), Co-reviewer (N/A), Review Status (Open), Last Updated (January 06, 2014 09:34), Last Completed Step (Employee Self Evaluation), and Next Step (Supervisor Evaluation). The 'Self Evaluation' section is for Linda McClenaghan and includes a 'Purpose' section with text: 'The College of Charleston believes that every staff member should be involved in the Performance Evaluation process. A high performance culture is created when employees provide their supervisor with information about their professional accomplishments and contributions to the College.' An 'Instructions' section is also visible.