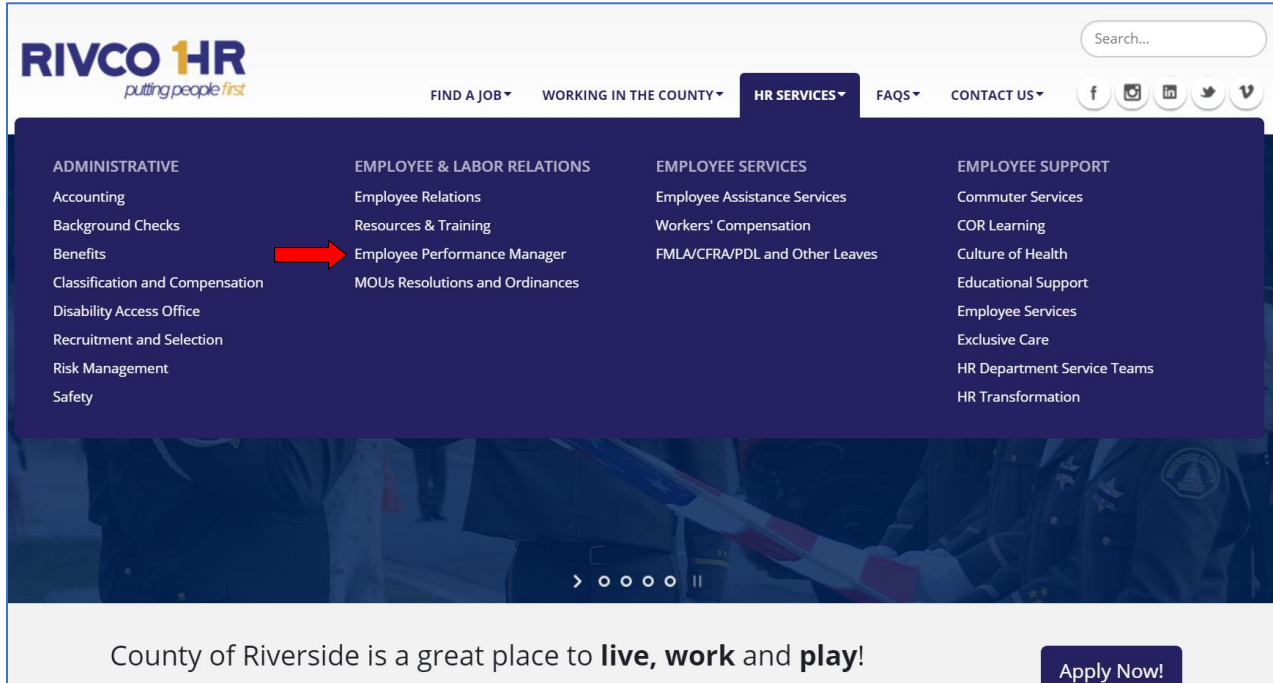


**Employee Performance Manager
User Guide
Version 3.0**

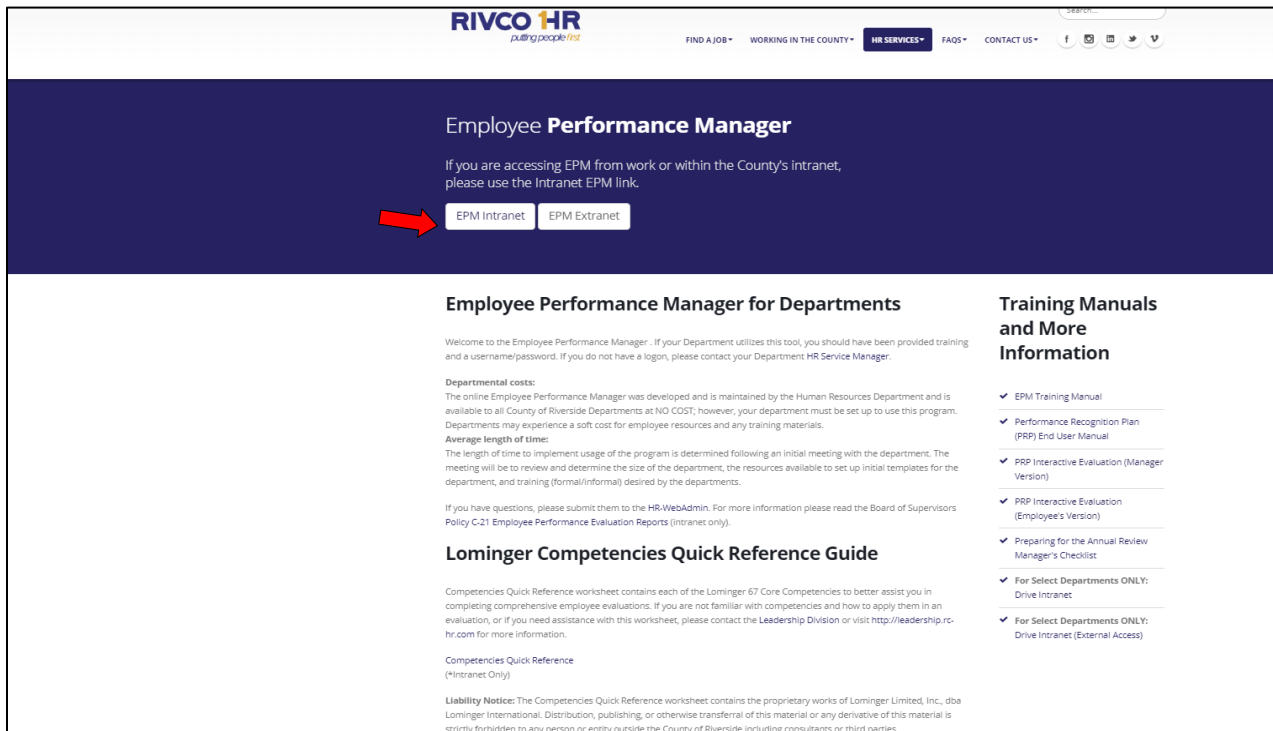


How to access the Employee Performance Manager System (EPM)

Use the following URL address: <http://www.rc-hr.com/> to access the Human Resources web page. Place the cursor over the HR Services tab and click on Employee Performance Manager as shown in the screen print below.



Click on EPM Intranet. EPM Extranet use applies when accessing the system from a remote location.



EPM training manuals and other performance management resources are available on the EPM page.

You can also access the EPM System and log in directly from the intranet or internet using the following URL address: <http://hr.web/pm/Login.aspx>

EPM System Sign On

Employee Performance Manager contains confidential and sensitive information about employees. It is important to maintain security of the system and prevent unauthorized use of the system.



Username:
Password:
[Forgot Password?](#)

Enter your username, which is your 6-digit Employee Identification Number (123456) and enter your password. If you are using the system for the first time, enter the default password, which is your 6-digit Employee Identification Number followed by a colon and exclamation point and the last 4 digits of your Social Security Number, using no spaces (123456:!3333) and click Login. The system will lock out after five unsuccessful login attempts. To prevent being locked out of the system, click **Forgot Password** and the system will auto-generate an email with instructions to reset your password.

After clicking **Forgot Password** a system generated email will be sent to you with password reset instructions.

Please provide your Username (Employee ID) and your password will be reset to the default value. (Employee ID# + ':' + Last four digits of your SSN)

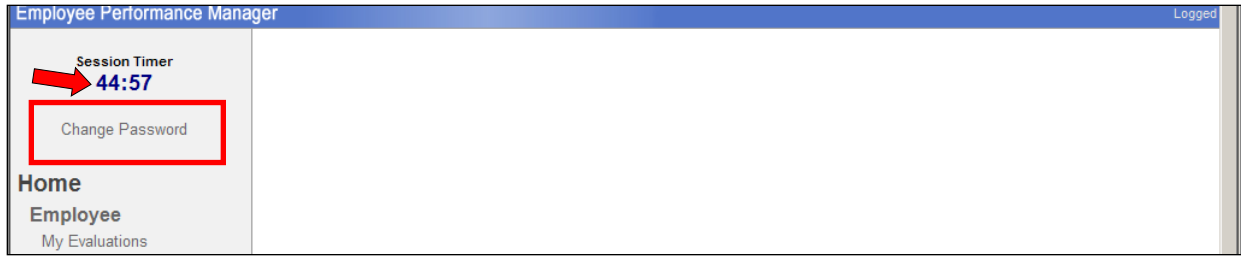
Username:

As shown in the screen print below, a 45-minute session timer is visible while you are signed in the system. The timer will reset each time you select, click or make an entry in the system. It is important to keep track of this session timer and save your entries before the session times out.

Changing Your Password

The EPM system contains confidential and sensitive information. It is important to maintain security and prevent unauthorized use of the system. Be sure to change your password after using the system default password.

Changing your password is easy. Click on the Change Password link from the Home Page

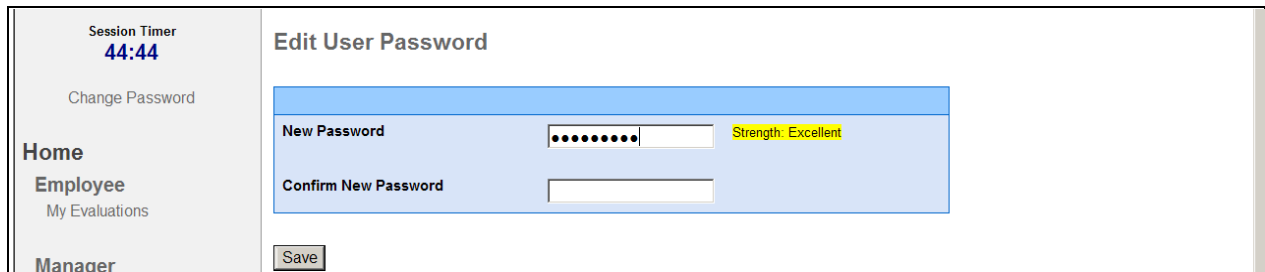


Security is especially important when choosing a password. Passwords should be easy to remember, but not easily guessed. If written down, passwords should be kept in a secure location.

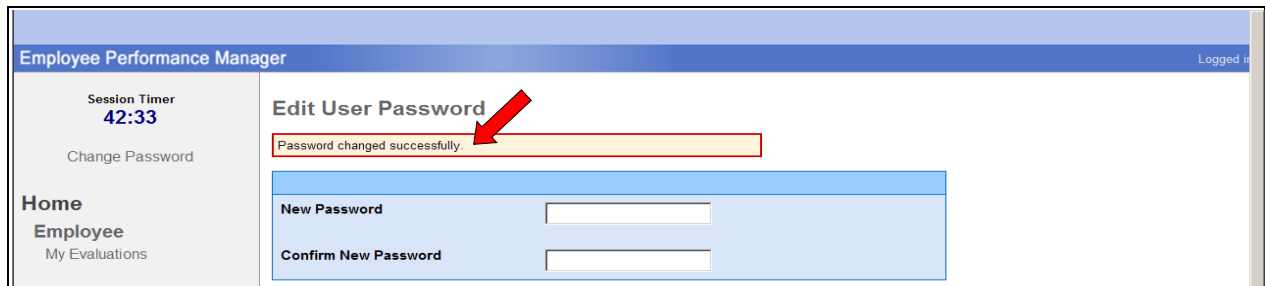
Consider the following when selecting a new password:

- It should not be something that could be easily guessed, such as your birthday, anniversary, nicknames, etc.
- Random selections of letters, numbers and symbols are best for maintaining security.
- Passwords are case-sensitive.
- Passwords should be at least 8 characters in length.

A system indicator will display the security level strength when entering a new password. The maximum-security level recommended is Excellent as indicated below. Enter a new password and reenter it to confirm. Click Save.



The system will display a prompt confirming your password was changed successfully.



Viewing/Printing My Evaluation Record

Click on My Evaluations to access and view your evaluation records.

Session Timer
44:41

Change Password

Home
Employee
My Evaluations

Stockmann, Thomas Employee Home Licensure Evaluations

My Employees >> Stockmann, Thomas

Status	Type	Due Date	Finalized
Projected	Annual	12/17/2012	
select	Pending Administrator Sign-off	12/15/2011	12/08/2011
select	Complete	12/15/2010	12/08/2011

To view and/or print a completed evaluation, select the link next to the evaluation record you wish to view. A projected evaluation cannot be viewed until it is completed and finalized by your supervisor or manager. An evaluation with a status of Pending Administrator Sign-off indicates your manager or supervisor completed and finalized the evaluation. To view/print, select the link, **View Evaluation** next to the evaluation you wish to view/print.

Employee Performance Manager Logged in

Session Timer
44:52

Change Password

Home
Employee
My Evaluations

Stockmann, Thomas Evaluation Home Employee Comments Notes

My Employees >> Stockmann, Thomas Evaluations >> Evaluation Home

Evaluation Detail

Evaluation Type: Annual
Evaluation Due Date: 12/15/2011
Evaluation Status: Pending Administrator Sign-off
Employee Position: 74772 - HUMAN RESOURCES ANALYST II (6/22/2006)
Finalized by: Michael O'Hallorhan on 12/8/2011

Actions

[View Evaluation](#)

The evaluation is displayed in PDF format after clicking View Evaluation link.

Interpersonal / Team Competencies

N/A -- Not Applicable B -- Below Expectations M -- Meets Expectations E -- Exceeds Expectations

	N/A	B	M	E
1 Political Savvy:				<input checked="" type="checkbox"/>

- Can maneuver through complex political situations effectively and quietly
- Is sensitive to how people and organizations function
- Anticipates where the land mines are and plans his/her approach accordingly
- Views corporate politics as a necessary part of organizational life and works to adjust to that reality
- Is a maze-bright person

Adding Comments to My Performance Evaluation

You may enter comments in response to your performance evaluation for a specific review period. Employee comments must be entered in the system 30 calendar days from the date the supervisor or manager finalized the performance evaluation.

Session Timer
44:41

Change Password

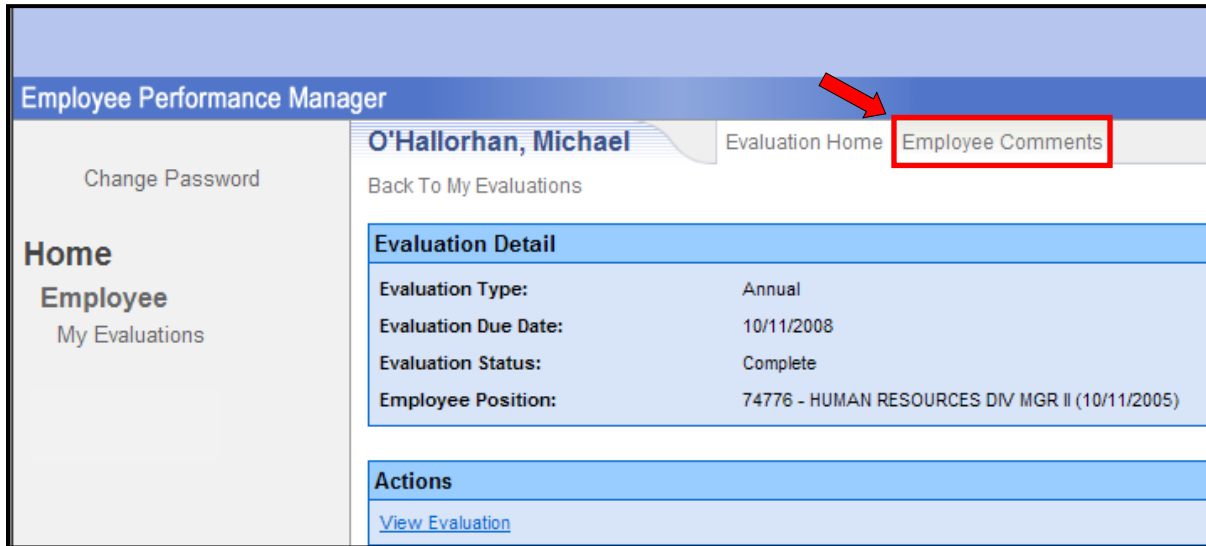
Home
Employee
My Evaluations

Stockmann, Thomas Employee Home Licensure Evaluations

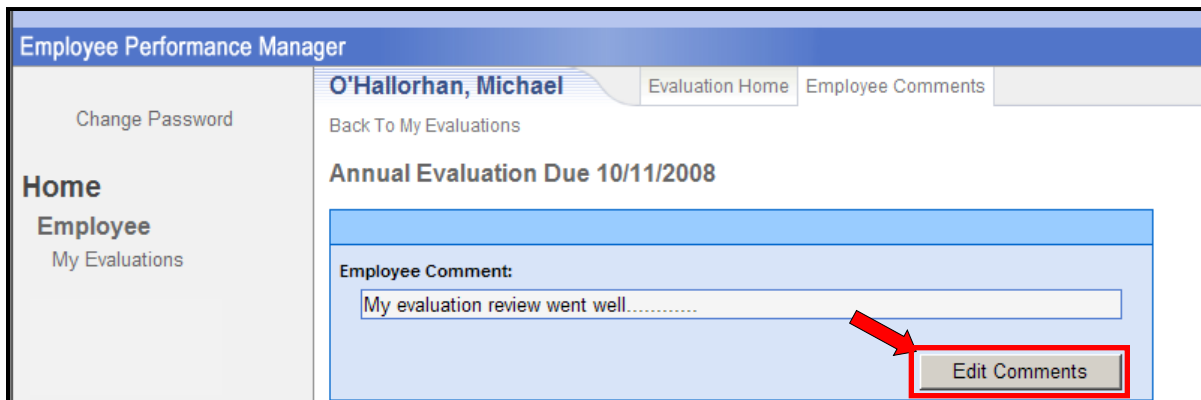
My Employees >> Stockmann, Thomas

Status	Type	Due Date	Finalized
select	Projected	12/17/2012	
select	Pending Administrator Sign-off	12/15/2011	12/08/2011
select	Complete	12/15/2010	12/08/2011

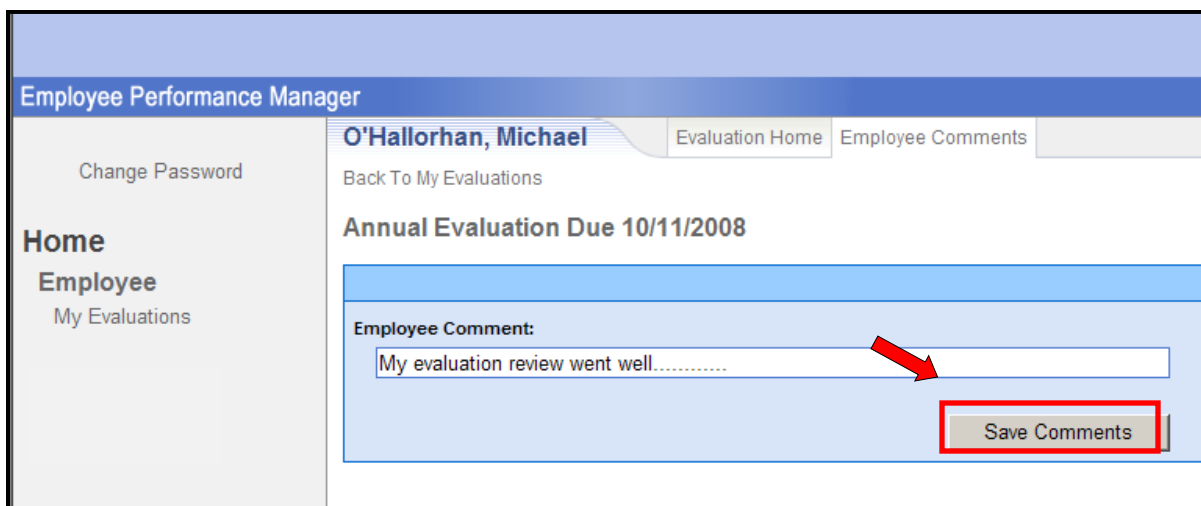
To add comments to the system, select the link next to the appropriate evaluation record. Click the Employee Comments tab to enter your comments as show below.



Click on Edit Comments and type your comments in the Employee Comments text box.




Click Save Comments when you're done entering your comments.



In the event 30 calendar days has lapsed from the date your performance evaluation was finalized, you may type and submit your comments on a Word document or provide a copy of your written comments to your department's EPM System Administrator. The system administrator will attach the document with your comments to the evaluation record in the EPM system.

Acknowledgement Form

When an evaluation has been completed and finalized by your supervisor or manager, you will receive an Acknowledgement Form to sign.

 Winner IPMA Award for Excellence		Employee Evaluation	
		Other Evaluation Due: 04/01/2008	
Employee Info			
Employee Name:			
County Department:	113 :: HUMAN RESOURCES		
Department:	1130100000 :: HUMAN RESOURCES		
Job Code & Title:	13133 :: SR HUMAN RESOURCES CLERK - C		
Evaluation Info			
Evaluation Type:	Other		
Evaluation Due Date:	04/01/2008		
Evaluation Completion Date:	07/14/2008		
Overall Rating			
<input type="checkbox"/> M	Meets Expectations		
I have reviewed, understand and am in receipt of a copy of the evaluation referenced on this signature form.			
_____	_____	_____	_____
(Signature)	Date	Evaluator Signature	Date
_____	_____	_____	_____
Department Manager Signature	Date	Administration Signature	Date

The Acknowledgement Form requires signatures from you, your supervisor, a department manager and/or a designated department administrator. The signed form is kept in your personnel file. It is not necessary for your manager or supervisor to attach the entire evaluation to this form as your performance evaluation will be kept in the EPM system electronically.

You may keep a copy of your completed performance evaluation for your records by printing a hard copy of your finalized evaluation from the Employee Evaluation screen page (see Page 4 of this guide).

Board of Supervisor's Policy C-21 – Employee Performance Evaluation Reports

To obtain additional information regarding performance evaluations, please refer to Board of Supervisor's Policy C-21, Employee Performance Evaluation Reports.

Setting up the Employee Evaluation and Importing Data (Manager/Supervisor Role)

Setting up the employee evaluation record requires importing data from the template directory. Initially the sections within the evaluation, i.e. Job Description, Competencies sections, etc. will be blank until a template is imported. Some manual entry of licensing and certification information may be required. Refer to the section on Licensure in this guide for instructions.

Starting from My Employees Evaluation Screen, select the appropriate employee evaluation record and click on the link as shown in the example below. This will take you to the employee's Evaluation Home Page.

Employee ID	Employee Name
select 000018	Anderson, Vicki
Evaluations:	
select	Annual 02/16/2011
select	5 Other 05/18/2010
select 000014	Andrews, Steve
Evaluations:	
select	163 Department Probation 12/01/2009

From the Evaluation Home Page, click **Import Data**.

Holman, Jake A Evaluation Home Job Description Physical Rqmts Competencies Rating Notes

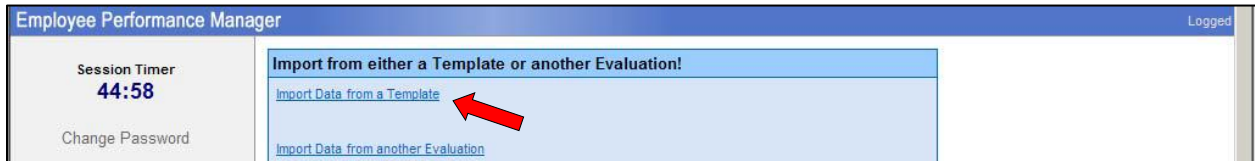
My Employees >> Holman, Jake A Evaluations >> Evaluation Home

Evaluation Detail	
Evaluation Type:	Annual
Evaluation Due Date:	6/22/2010
Evaluation Status:	Projected
Employee Position:	74772 - HUMAN RESOURCES ANALYST II (6/22/2006)

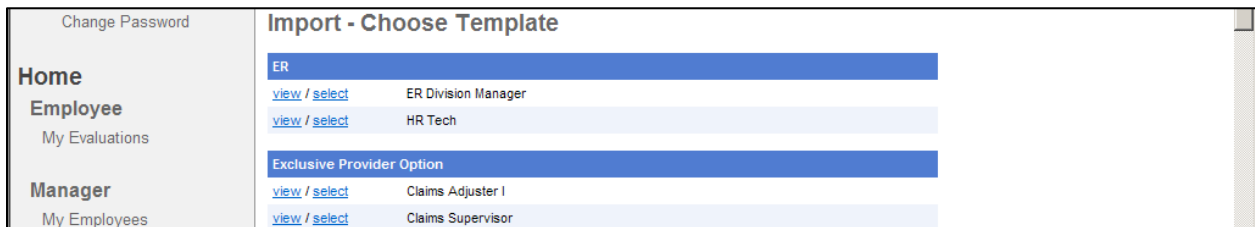
Actions
Print Evaluation Draft
Import Data
An overall rating and supporting comments are required before an evaluation can be finalized.

Supporting Documents
Upload New Document

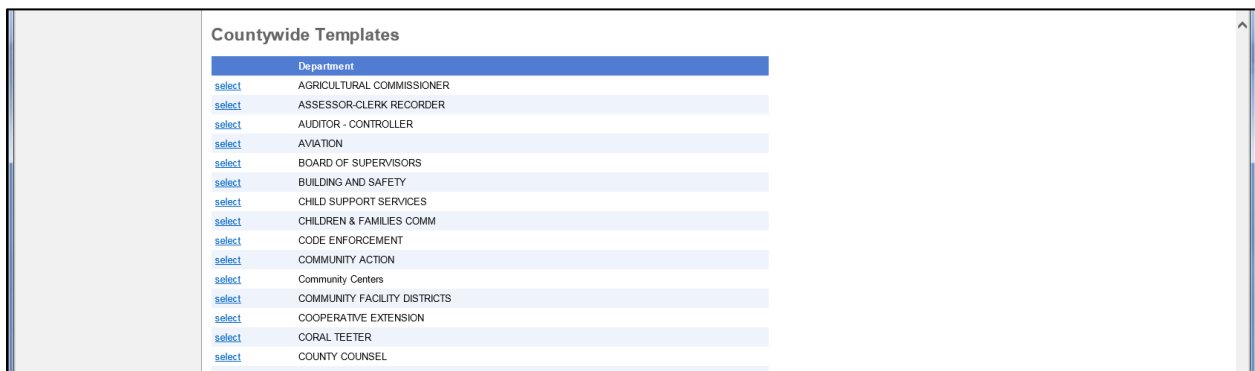
Data may be imported from a previously completed evaluation record provided historical evaluation data is stored in EPM, otherwise to proceed with setting up the evaluation record, click on **Import Data from a Template**.



Templates were created during the initial set up and vary by department. The Template Directory may include generic job classification templates with job specific criteria only. Other templates may include additional criteria such as Competencies, etc. Be sure to thoroughly review the templates first by clicking **View**. After reviewing the template and verifying the contents, click on **Select** to import the appropriate template.



Countywide templates are available in View only mode by scrolling to the bottom half of the template directory page. To obtain Template Import access rights for other county department templates, please contact your Department or County Human Resources EPM Administrator. See screen print below.



A checklist will display all sections that make up the evaluation document. The Job Description and Physical Requirements boxes will be selected as part of a system default. The Template Groups must be selected by clicking on the individual competency sections, i.e. Job Duties and Essential Functions, Success Competencies, etc. you want imported.

Session Timer
44:49

Change Password

Home

Employee
My Evaluations

Manager
My Employees
Manager Reports

Resources
Competencies Quick Reference
Manager Checklist
Version 3 Training Manual
Version 3 Enhancements

Import Template - Choose Sections to Import

Please Choose the Sections you want to Import

Job Description

Physical Requirements

Competencies

Template Groups	Evaluation Groups
<input type="checkbox"/> Job Duties and Essential Functions	not imported.
<input type="checkbox"/> Success Competencies	not imported.
<input type="checkbox"/> Interpersonal / Team Competencies	not imported.
<input type="checkbox"/> Organizational Competencies	not imported.
<input type="checkbox"/> Goals / Objectives	not imported.

Import

Select the applicable Template Group categories and check off the individual group categories you want to import to create the employee's system evaluation. Review the system Evaluation Groups categorized in the right-hand column, shown in the screen page below, to ensure the Template Group categories checked off match the Evaluation Groups before clicking **Import**. If the columns don't match, use the drop-down menu to select the appropriate category. This step is required to ensure the system template properly transfer the data to the appropriate categories selected to set up the employee's system evaluation document.

Data transfer from the Template Group categories may be copied to a different Evaluation Group category, if appropriate. Use the drop-down menu to select a different Evaluation Group section category. Proceed by clicking **Import**.

Session Timer
44:45

Change Password

Home

Employee
My Evaluations

Manager
My Employees
Manager Reports

Resources
Competencies Quick Reference
Manager Checklist
Version 3 Training Manual

Import Template - Choose Sections to Import

Please Choose the Sections you want to Import

Job Description

Physical Requirements

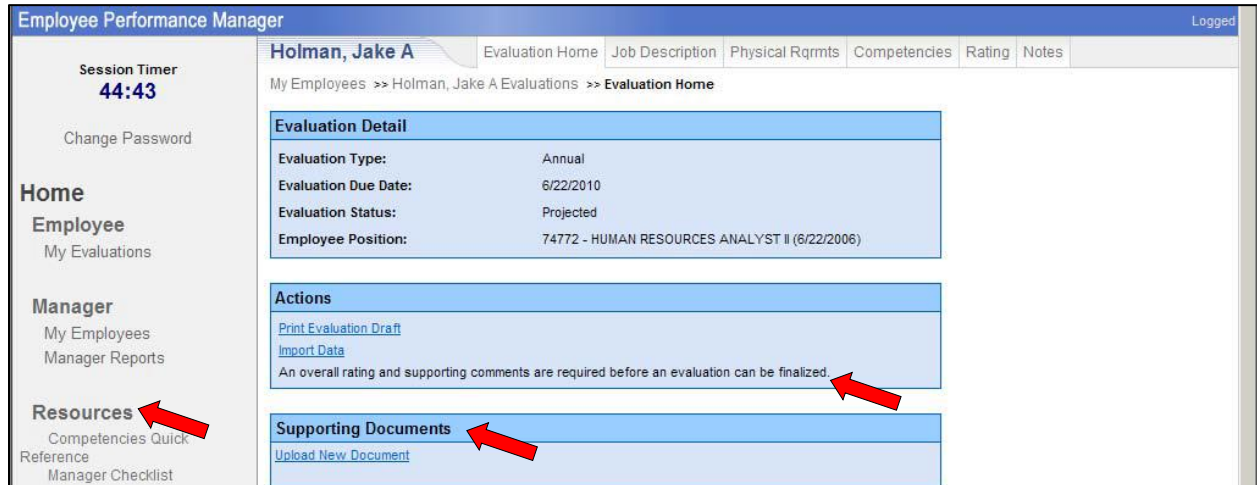
Competencies

Template Groups	Evaluation Groups
<input checked="" type="checkbox"/> Job Duties and Essential Functions	imported into Job Duties and Essential Functions
<input checked="" type="checkbox"/> Success Competencies	imported into Success Competencies
<input checked="" type="checkbox"/> Interpersonal / Team Competencies	imported into Interpersonal / Team Competencies
<input type="checkbox"/> Organizational Competencies	not imported.
<input type="checkbox"/> Goals / Objectives	not imported.

Import

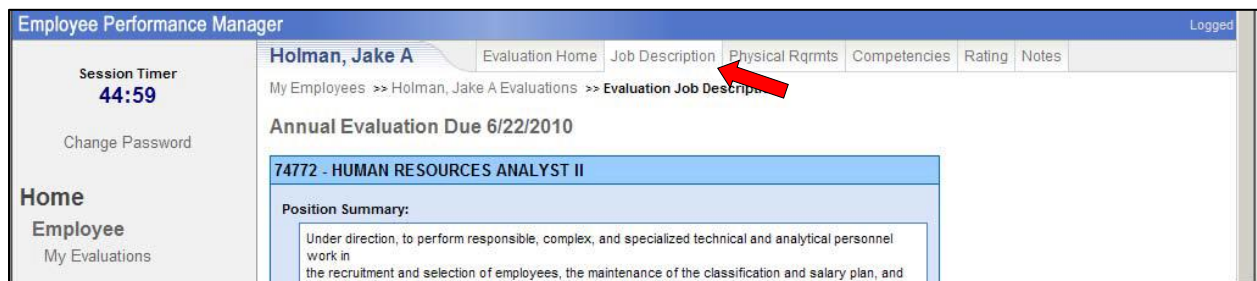
It may be necessary to import a second template depending on the initial template set up. Deselect items previously imported and only select the Templates Groups you want imported otherwise previously imported data will be overwritten.

After importing the template data, the system automatically returns to the Employee Evaluation Home Page.



System Resources

The Employee Evaluation Home Page provides resources with links to relevant tools and documents to assist managers with planning, preparing and completing performance evaluations. The **Supporting Documents Section** provides functionality to easily attach relevant documents pertaining to a specific review period. Message Alerts prompt the supervisor or manager when a rating is missing, or comments are required. An evaluation cannot be finalized until all ratings and comments are entered. A **Notes** section is provided for note taking purposes. Please use discretion when entering information in this section as this detail is discoverable. Fact based statements are recommended. **Breadcrumbs** are provided to help the end user navigate the system and return to the previous screen page.

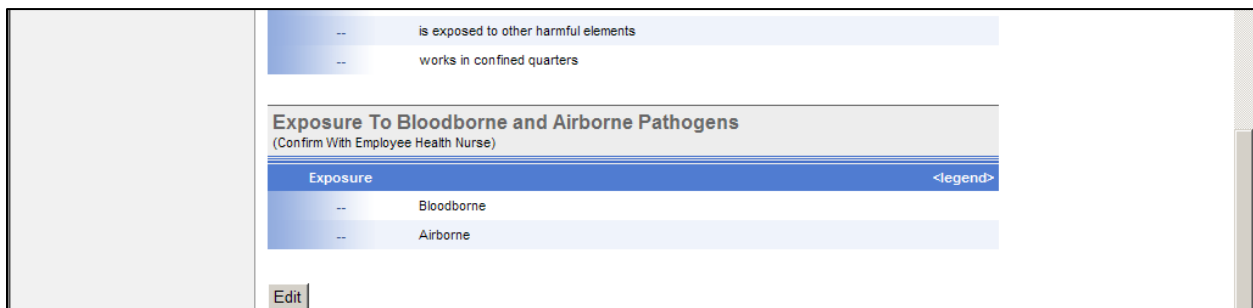


In the example shown above, the information displayed reflects data imported from the template into the Job Description section. This information reflects job detail from the job classification specifications. The data imported to the Job Description section is locked once it's imported and cannot be edited. Contact your EPM system department administrator if you need assistance removing incorrectly imported data in this section.

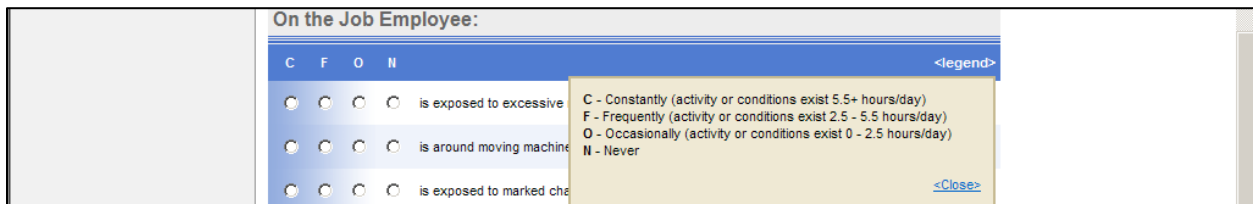
The Physical Requirements Tab shown below may be hidden or displayed. If the department opts to use this section, the EPM System Administrator will enable this setting during the initial department set up.



The Physical Requirements section is initially left blank unless it is part of the template. If it's not part of a template, data may be entered manually. Scroll to the bottom of the page and click 'Edit' to enter data.



After clicking the Edit button, use the radio buttons and select the appropriate frequency indicators. Click on the <legend> to view the list of frequency indicators.



It is important to review and validate each section of Evaluation Competencies before entering ratings to confirm all relevant job data imported correctly from the template. Competency section headings may vary by department, i.e. Success Competencies, etc. To review each section, **Select** the link to open each section and review the imported data before rating and entering comments.



The example below reflects data imported into the Interpersonal/Team and Organizational Competencies categories. This section of the evaluation is considered part of the evaluation criteria and will be rated by the manager or supervisor.

Annual Evaluation Due 10/27/2010

Interpersonal / Team Competencies

Ratings Definitions
Below Standards Performance - consistent failure to meet goals and objectives despite intervention.
Meets Performance - consistently fulfills job requirements, achieves goal and objectives; meets standard job expectations at an acceptable level.
Exceeds Performance - consistently exceeds expectations, goes above and beyond; is highly productive; model of superior performance and service excellence.

N/A Below Standards Performance Meets Performance Exceeds Performance [edit / delete](#)

1	<p>Political Savvy:</p> <ul style="list-style-type: none"> - Can maneuver through complex political situations effectively and quietly - Is sensitive to how people and organizations function
---	--

To make changes to the criteria within this section, select **Edit** or **Delete** prior to finalizing an evaluation or to add criteria, click **Add New Competency**.

N/A Below Standards Performance Meets Performance Exceeds Performance [edit / delete](#)

4	<p>Interpersonal Savvy:</p> <ul style="list-style-type: none"> - Relates well to all kinds of people, up, down, and sideways, inside and outside the organization - Builds appropriate rapport - Builds constructive and effective relationships - Uses diplomacy and tact - Can diffuse even high-tension situations comfortably
---	--

[Add New Competency](#)

Licensure

The licensure section may be used to track and monitor licensure, certification and training Requirements. **Select** the link as shown below to access and document licensure or certification information.

select	000010	Horn, Tom
Evaluations:		
select	Annual	06/22/2010

Click on the licensure tab to enter pertinent data and upload documents.

The screenshot shows the 'Employee Performance Manager' interface. At the top, there are tabs for 'Employee Home', 'Licensure', and 'Evaluations'. The 'Licensure' tab is selected and highlighted with a red arrow. Below the tabs, the user's name 'Anderson, Vicki' is displayed. A 'Session Timer' shows 44:56. A 'PeopleSoft Data' section is visible, showing 'Employee ID: 000018' and 'Supervisor: Michael O'Hallorhan :: HUMAN RESOURCES DIV MGR II'. A sidebar on the left contains navigation options like 'Home Employee', 'Manager My Employees', and 'Resources'.

To add pertinent data in the licensure, certification and training sections, click Add Licensure, Add Certification, etc.

This screenshot displays the 'Licensure', 'Certification', and 'Training' sections. Each section has a table with columns for 'Description', 'Reference Nbr', and 'Expiration/Completed Date'. Below each table is a 'No Records Found!' message and an 'Add' button (Add Licensure, Add Certification, etc.). A red arrow points to the 'Add Licensure' button. The left sidebar is visible, showing 'Home Employee', 'Manager My Employees', and 'Resources'.

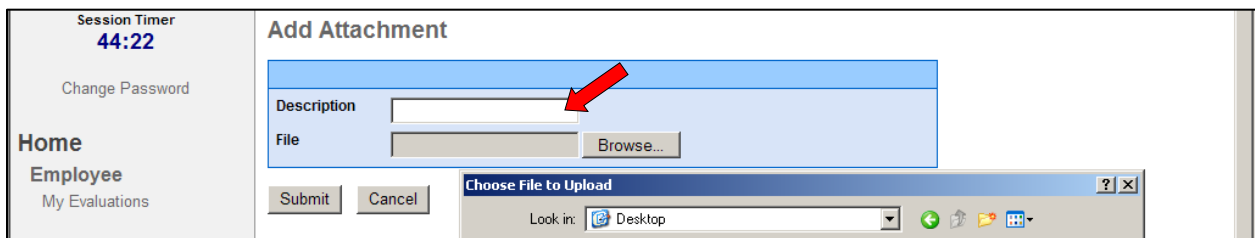
To add Licensure detail, proceed by selecting or typing in the Description; Reference Number, Expiration Date and click Save.

The screenshot shows the 'Add Licensure for Anderson, Vicki' form. It has three input fields: 'Description' (with a dropdown menu showing 'Marriage, Family Therapist'), 'Reference Number' (with the value '2490279'), and 'Expiration Date' (with the value '8/11/2010'). Below the fields are 'Save' and 'Cancel' buttons. A calendar widget is open, showing 'August, 2010' with days of the week and dates. The left sidebar is visible, showing 'Home Employee', 'Manager My Employees', and 'Resources'.

Licensure, certification and other training documents may be saved, printed and stored in the system.



To upload these documents, click **Add Attachment**. Next, type a Description, File to Upload and click the Browse button. Select the appropriate file and click Save. The file document will be stored in the system for future retrieval or reference.



Once the licensure section is completed, click on the Evaluations tab referenced below to access the Employee Evaluation Home Page.



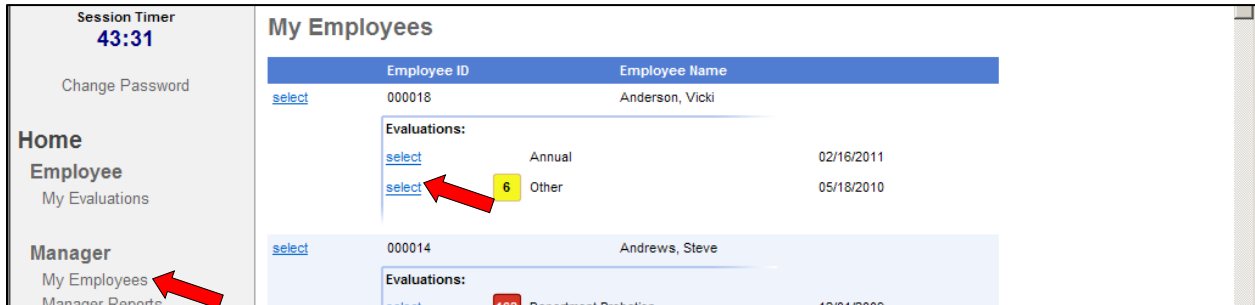
Select the appropriate evaluation record from the Employee Evaluation Home Page.

Follow the instructions on the next page to begin working on an evaluation.



Completing, Editing and Finalizing an Evaluation

A template must be imported first before the supervisor or manager begins working on completing a draft and finalizing an evaluation. Refer to the instructions on Page 9 to import a template. To begin rating the evaluation, start from the Managers Home Page and select the link **My Employees**. **Select** the employee evaluation you wish to complete. In the example below, the link to access the annual evaluation due on May 16, 2010, is referenced.



The screenshot shows the 'My Employees' page. On the left is a navigation menu with 'Home', 'Employee', and 'Manager' sections. The main area displays a table of employees and their evaluations. A red arrow points to the 'select' link for the employee 'Anderson, Vicki'. Another red arrow points to the '6' rating for the 'Other' evaluation.

Employee ID	Employee Name
000018	Anderson, Vicki
Evaluations:	
Annual	02/16/2011
Other	05/18/2010

To begin rating evaluation criteria, click on the Competencies section tab header first. Open each section under the Competencies tab by selecting the appropriate links.

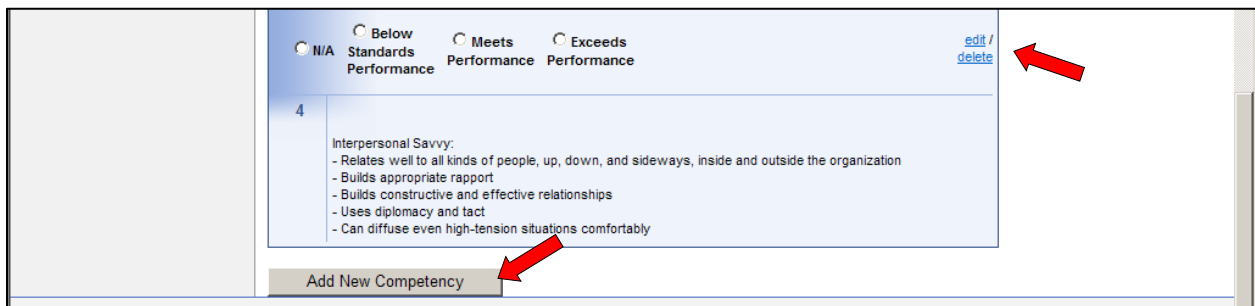


The screenshot shows the 'Anderson, Vicki' evaluation page. The 'Competencies' tab is selected. A red arrow points to the 'Rating' tab. Another red arrow points to the 'Interpersonal / Team Competencies' link.

Annual Evaluation Due 2/16/2011

- Job Duties and Essential Functions
- Success Competencies
- Interpersonal / Team Competencies
- Organizational Competencies
- Professional Development
- Goals / Objectives

Some editing may be required in each section. Use the **Edit**, **Delete** or **Add New Competencies** buttons within each section to make changes or delete information before you begin working on or finalizing the evaluation.



The screenshot shows the 'Interpersonal Savvy' competency section. At the top are radio buttons for 'Below Standards Performance', 'Meets Performance', and 'Exceeds Performance'. A red arrow points to the 'edit/delete' link. Another red arrow points to the 'Add New Competency' button.

Interpersonal Savvy:

- Relates well to all kinds of people, up, down, and sideways, inside and outside the organization
- Builds appropriate rapport
- Builds constructive and effective relationships
- Uses diplomacy and tact
- Can diffuse even high-tension situations comfortably

Click on the appropriate rating of 'Below', 'Meets', or 'Exceeds' in each of the competency areas or evaluation criteria sections.

A 'Below' or 'Exceeds' rating will require comments to substantiate these ratings. A system prompt appears when these ratings are selected. To add comments, click the **Edit** button as shown above.

After clicking edit, enter the comments under the Comments section and click Save. If the contents in the Description section require modification, edit the appropriate section and click **Save**.

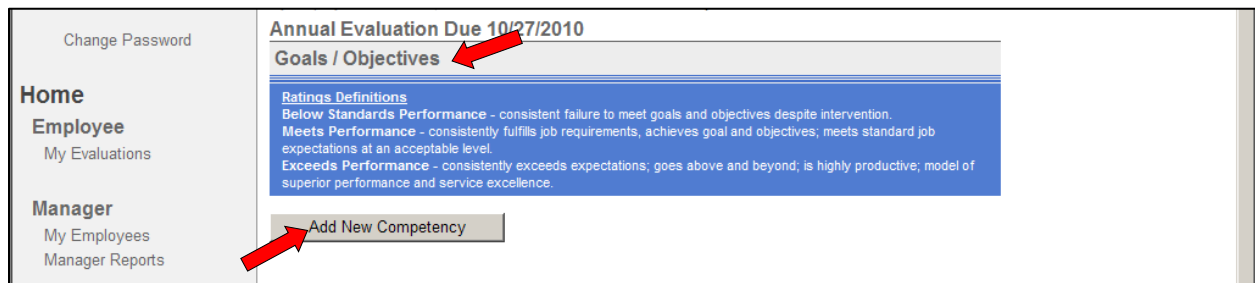
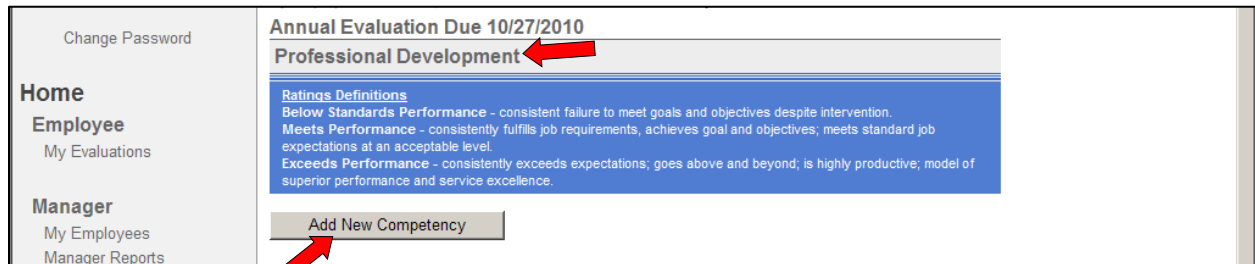
The comments appear directly below the rated criteria after the data is entered and saved. Modifications to the evaluation criteria description will update immediately after the changes are saved.

The screenshot shows a web interface for 'Interpersonal Team Competencies'. On the left is a navigation menu with sections: Home, Employee (My Evaluations), Manager (My Employees, Manager Reports), Resources (Competencies Quick Reference, Manager Checklist), and Admin (Employee Search, Edit Users, Admin Reports, Licensure Setup). The main content area is titled 'Ratings Definitions' and lists three performance levels: 'Below Standards Performance' (selected with a radio button), 'Meets Performance', and 'Exceeds Performance'. Below this is a table with one row for '1' under the 'Political Savvy' competency. The description for 'Political Savvy' includes: '- Can maneuver through complex political situations effectively and quietly', '- Is sensitive to how people and organizations function', '- Anticipates where the land mines are and plans his/her approach accordingly', '- Views corporate politics as a necessary part of organizational life and works to adjust to that reality', and '- Is a maze-bright person'. A 'Comments:' field contains the text: 'Vicki has not demonstrated proficiency in this competency. On one occasion, Vicki...'. A red arrow points to the end of this comment text. At the bottom of the table, there are radio buttons for 'Below Standards Performance', 'Meets Performance', and 'Exceeds Performance', along with 'edit / delete' links.

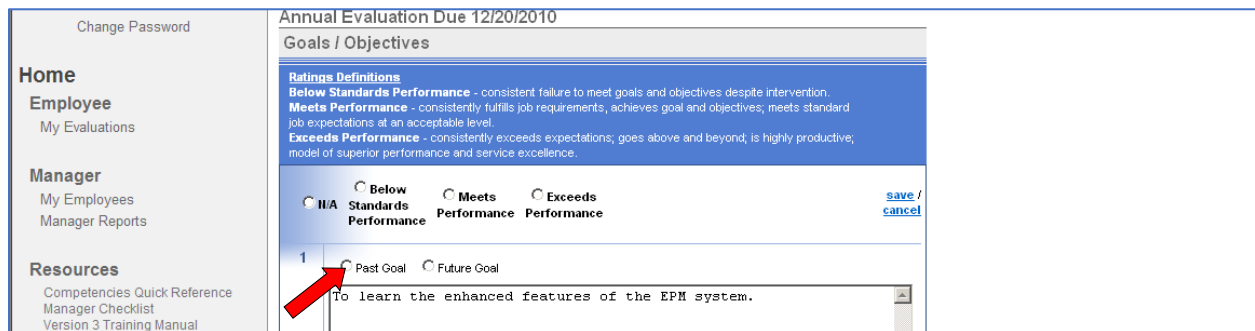
The supervisor or manager may determine certain evaluation criteria are not applicable to the review period. This data may be deleted by clicking the **Delete**, or **N/A** radio buttons.

This screenshot is identical to the one above, but with different radio button selections. The 'N/A' radio button is now selected, and the 'Below Standards Performance' radio button is unselected. A red arrow points to the 'N/A' radio button. Another red arrow points to the 'delete' link in the 'edit / delete' text at the bottom right of the table. The comment text remains the same.

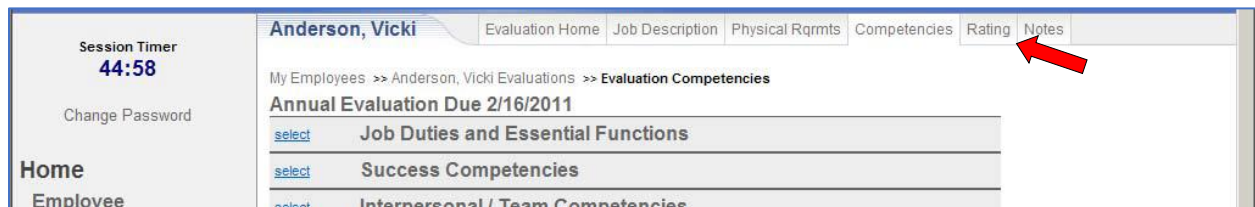
The screen prints shown below are the 'Professional Development' and 'Goals/ Objectives' categories within the employee's system evaluation. These categories are included in the Competencies tabbed section of the evaluation. To enter evaluation criteria, click **Add New Competency**, enter the pertinent information and rate the section criteria, accordingly. This information may also be set up within the template and imported from the template directory as appropriate.

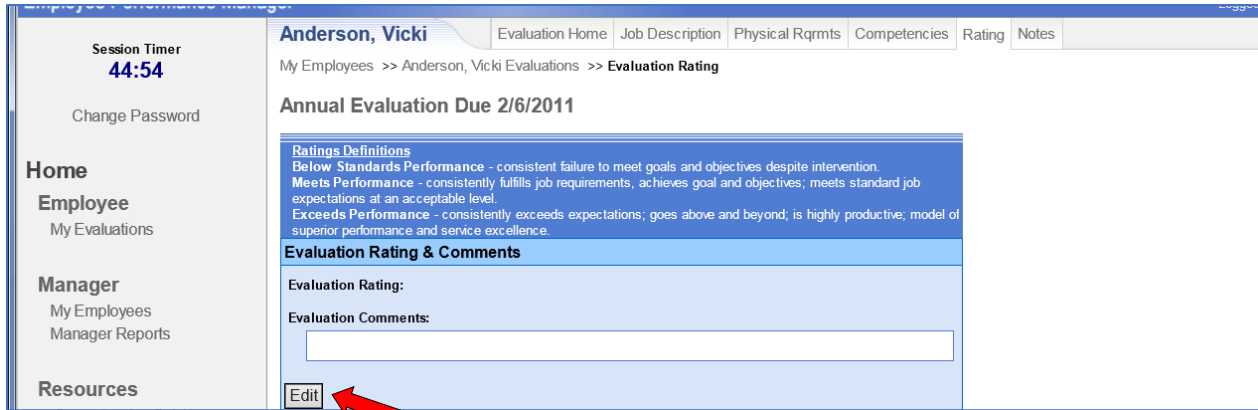


Adding a manual entry to the Goals and Objectives section as show below provides a feature for the manager or supervisor to designate a specific goal or objective as a 'Past Goal' or 'Future Goal' by selecting the appropriate radio button as shown below.



After rating all sections of the evaluation, an overall rating must be entered. Click on the Rating section, as referenced below.



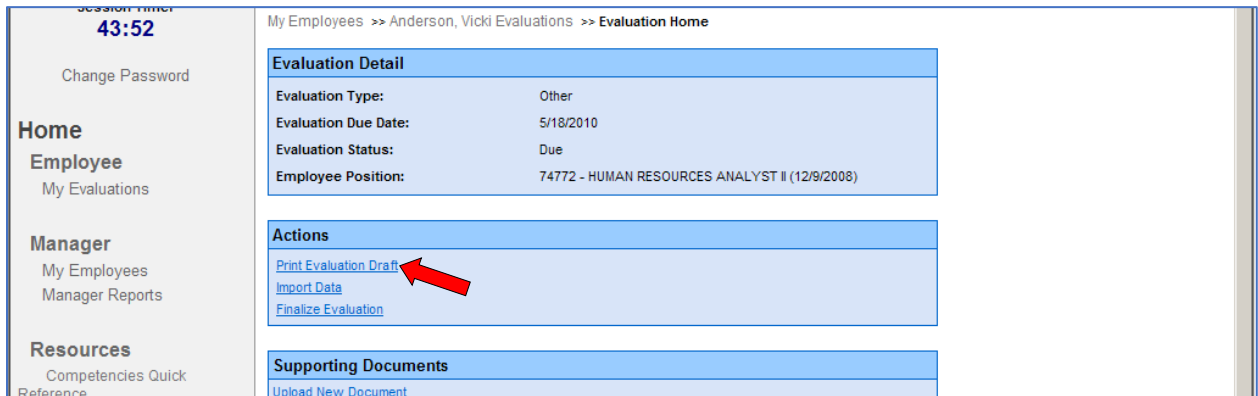


Click the Edit button to enter the overall rating and comments. Comments are required before you can finalize the evaluation.

The evaluation review and approval process may vary by department. An overall 'Below' or 'Exceeds' rating may require department management review and approval prior to finalizing the evaluation. Please seek assistance from your designated department representative or contact County Human Resources.

If the manager or supervisor anticipates granting an overall rating of 'Below' standards, notify Human Resources prior to the review meeting and finalizing the evaluation. Human Resources will review the evaluation, provide feedback, and assist with the completion of a Performance Improvement Plan in accordance with Board of Supervisors Policy C-21.

To print a draft copy of the evaluation, click on **Print Evaluation Draft** from the Employee Evaluation Home Page, as show below.

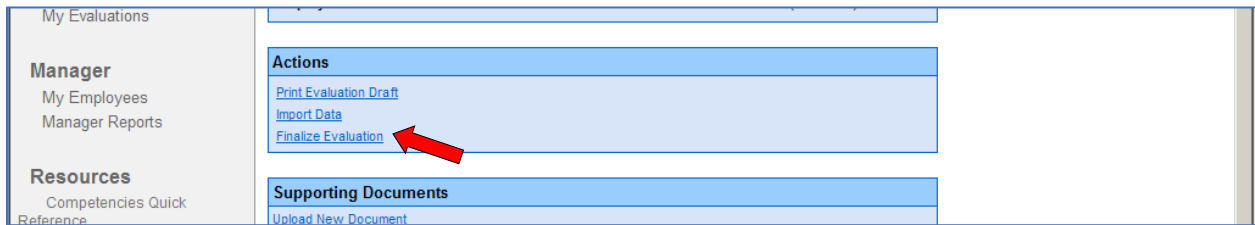


The system will display a prompt. Click to Open or Save the evaluation draft. By opening the document, a draft copy may be printed in a PDF format.

The draft copy may be used after appropriate management approvals are obtained to conduct the performance evaluation review meeting with the employee before finalizing the evaluation.

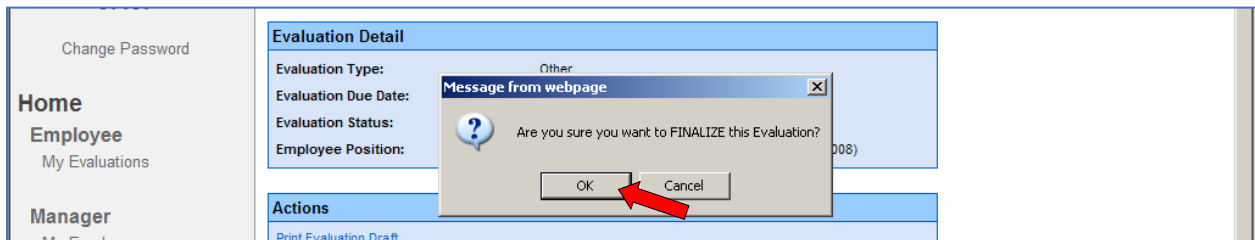
Finalizing the Evaluation

To finalize an evaluation, Click **Finalize Evaluation** from the Employee Evaluation Home Page.



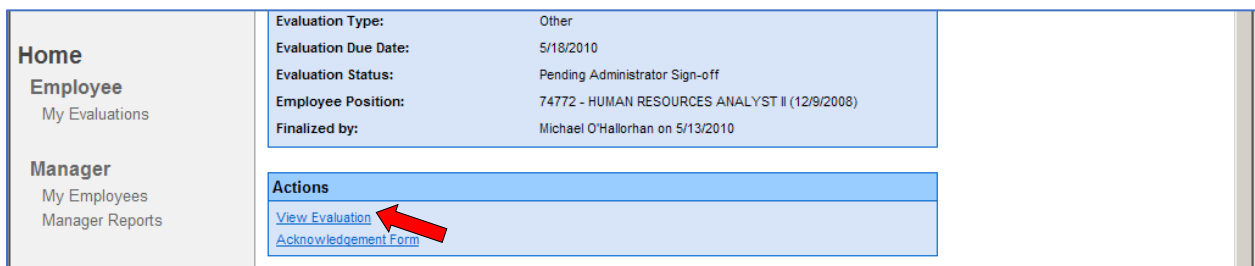
The screenshot shows the 'My Evaluations' page. On the left, there are navigation links for 'Manager' (My Employees, Manager Reports) and 'Resources' (Competencies Quick Reference). The main content area has two sections: 'Actions' with links for 'Print Evaluation Draft', 'Import Data', and 'Finalize Evaluation' (highlighted with a red arrow); and 'Supporting Documents' with a link for 'Upload New Document'.

The system prompt will ask for a confirmation before a finalization of the evaluation occurs. Click 'OK' or 'Cancel'.



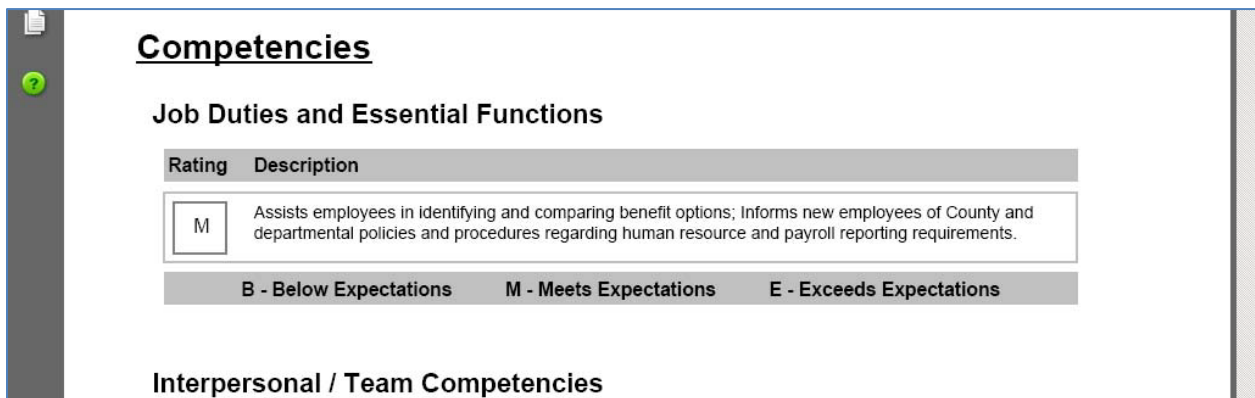
The screenshot shows the 'Evaluation Detail' page with a modal dialog box titled 'Message from webpage'. The dialog asks 'Are you sure you want to FINALIZE this Evaluation?' and has 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red arrow. The background shows the 'Evaluation Detail' section with fields for 'Evaluation Type: Other', 'Evaluation Due Date: 5/18/2010', 'Evaluation Status: Pending Administrator Sign-off', 'Employee Position: 74772 - HUMAN RESOURCES ANALYST II (12/9/2008)', and 'Finalized by: Michael O'Hallorhan on 5/13/2010'. Below this is the 'Actions' section with a link for 'Print Evaluation Draft'.

Click **View Evaluation**, to view, save, or print a copy of the final evaluation.



The screenshot shows the 'Evaluation Detail' page. The 'Actions' section at the bottom has two links: 'View Evaluation' (highlighted with a red arrow) and 'Acknowledgement Form'.

The final evaluation is saved in a PDF format as shown in the example below.



The screenshot shows the 'Competencies' page. It has a sidebar with a question mark icon. The main content is titled 'Job Duties and Essential Functions' and contains a table with the following data:

Rating	Description
M	Assists employees in identifying and comparing benefit options; Informs new employees of County and departmental policies and procedures regarding human resource and payroll reporting requirements.


Below the table, there is a legend: B - Below Expectations, M - Meets Expectations, E - Exceeds Expectations. The page also has a section for 'Interpersonal / Team Competencies'.

Acknowledgment Form and Signatures

After the manager or supervisor obtains the required approvals; conducts the review meeting and finalizes the evaluation, the employee will sign into the system to view the evaluation and may add his or her comments. The employee has 30 calendar days to make comments using the EPM system. If comments are not made during this timeframe the employee cannot add comments. If this occurs, comments may be typed on a Word document and uploaded in EPM. Employee access to EPM is limited to viewing or copying finalized evaluations and historical records and/or entering comments.

The final step requires the supervisor or manager to print an Acknowledgement Form. Click **Acknowledgment Form** to print a hard copy of the form.

The screenshot displays the EPM system interface. On the left, there is a navigation menu with sections for 'Manager' (My Employees, Manager Reports) and 'Resources'. The main content area shows the following information:

Finalized by:	Michael O'Hallorhan on 5/13/2010
Actions	
View Evaluation	
Acknowledgement Form 	
Supporting Documents	

County Department:	113 :: HUMAN RESOURCES
Department:	1130100000 :: HUMAN RESOURCES
Job Code & Title:	13133 :: SR HUMAN RESOURCES CLERK - C

Evaluation Info

Evaluation Type:	Other
Evaluation Due Date:	04/01/2008
Evaluation Completion Date:	07/14/2008

Overall Rating

M	Meets Expectations
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The printed Acknowledgement Form shown above requires signatures from the employee, evaluator, department manager and a designated department administrator. The signed form is submitted to Human Resources for the personnel file and completes the evaluation process. It is not necessary to attach the entire evaluation to this form.

Granting Temporary Access

Temporary access may be granted to an authorized individual to complete an evaluation on behalf of the supervisor or manager. Begin by selecting the 'My Employees' link located on the left side of the screen page. Next, **Select** the link directly to the left of the employee I.D. number.

Employee ID	Employee Name
000018	Anderson, Vicki
000014	Andrews, Steve

Click the **Manage Temporary Access** link from the Employee Home tab.

Reg/Temp :: Full/Part :: Status: R :: F :: A

Actions

[Manage Temporary Access](#)

A dialog box will display 'Manage Temp Access For' next to the name of the employee whose evaluation record you want to grant access to. In the example below, we are granting access to Vicki Anderson's evaluation record. Click 'Add' to continue.

Manage Temp Access For Anderson, Vicki

Use First Name, Last Name and/or County ID to lookup Employees.

First Name:

Last Name:

County ID:

Enter date range for temporary access:

Start Date: ...

Expiration Date: ...

- Type the First and Last Name or EMPID in the appropriate fields of the employee you are granting access to.
- Click 'Search'
- Select the employee you are granting access to by clicking **Select**

Temporary access automatically expires within 30 days or you may enter a date range. To revoke temporary access, click 'Revoke' from the Manage Temporary Access screen. Select 'Cancel' to return to the Employee Home Page.

Martin, H S	4/29/2010	5/29/2010
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How to Upload a Signed Employee Acknowledgement Form and Other Documents

From the Employee Evaluation Home Page Click on **Received Acknowledgement Form** which will change the Evaluation Status to Complete

Next, Click on **Upload New Document** to upload the signed Acknowledgement Form from your computer file. To complete this action, you must have a scanned copy of this document saved on your computer to upload it.

Other pertinent documents relevant to the evaluation record may be uploaded.

The screenshot displays the Employee Evaluation Home Page interface. On the left is a navigation sidebar with sections: Home, Employee (My Evaluations), Manager (My Employees, Manager Reports), and Resources (Competencies Quick Reference, Manager Checklist, Version 3 Training Manual, Monthly Featured Article, Employee Self Review (optional)). The main content area is divided into three sections: Evaluation Detail, Actions, and Supporting Documents. The Evaluation Detail section shows: Evaluation Type: Department Probation; Evaluation Due Date: 3/18/2015; Evaluation Status: Pending Administrator Sign-off; Employee Position: 13611 - HUMAN RESOURCES TECHNICIAN I (@/18/2014); Finalized by: Vivian Nunez on 10/28/2015. The Actions section contains links: View Evaluation, Acknowledgement Form, Employee Comments, Received Acknowledgement Form (highlighted with a red arrow), Unfinalize Evaluation, and Generate Evaluation View. The Supporting Documents section contains a link: Upload New Document (highlighted with a red arrow).