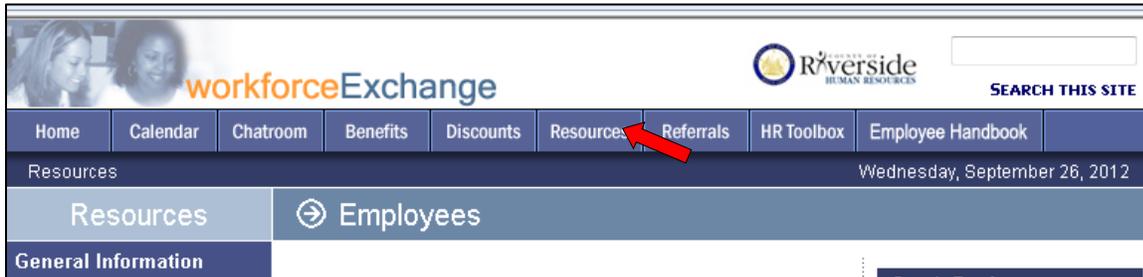
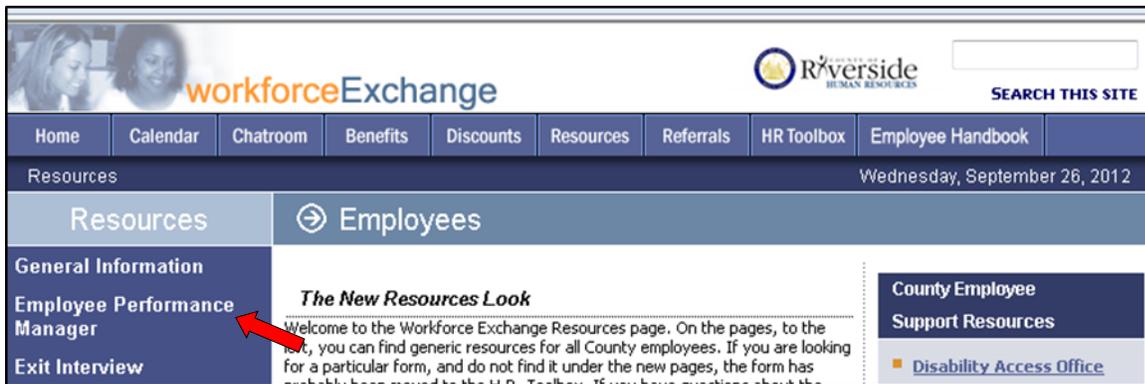


Accessing the Employee Performance Manager (EPM) System

The Employee Performance Manager (EPM) tool is available through the Intranet. Remote Extranet access is also available via the Internet. To access the EPM tool, go to WorkforceExchange.net and select the Resources Tab at the top of the screen page.



From the Resources screen page, double click Employee Performance Manager under the Resources menu bar on the left side of the screen page.



From the Employee Performance Manager Home Page click the Employee Performance Access link (Intranet only) as referenced in the screen print below. The Secure Extranet link is for remote access only.



Accessing the Employee Performance Manager (EPM) System

Signing on the system

The sign on screen will appear after you click on the Employee Performance Manager Program link Intranet only. Enter your username, which is your 6 digit Employee Identification Number (123456). Enter your password, which is your 6 digit Employee Identification Number again, a colon and exclamation point followed by the last 4 digits of your Social Security Number (123456:!3333) and press Login. The system will lock out after five unsuccessful login attempts. Contact your department's System Administrator or the Help Desk at micro 59033 or 951-955-9033 if you are locked out of the system.



Note: Please be sure to confirm or enter your current email address when the system prompts you to do so upon signing in the system for the first time.

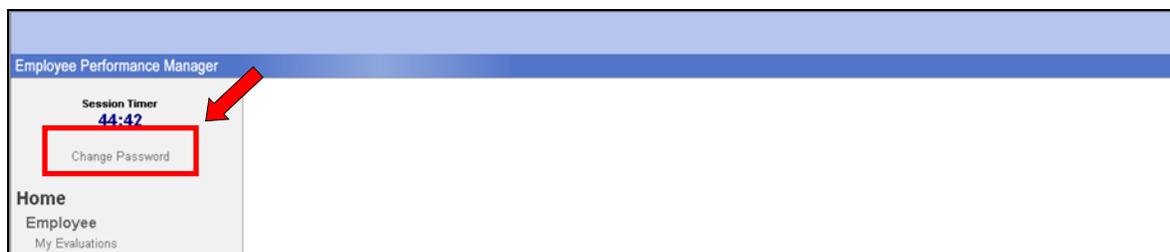
System Passwords

Employee Performance Manager contains confidential and sensitive information about employees. It is important to maintain security and prevent unauthorized use of the system. Be sure to change your password after signing in and using the system default password.

Changing Your Password

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. Please change the system default password to a personalized password after the initial sign on.

To change your password, click on the Change Password link from the EPM Home Page.



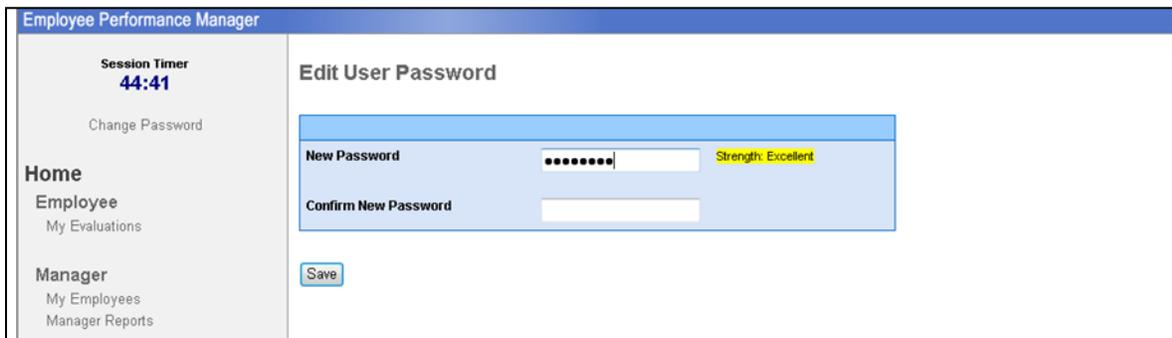
Security is especially important when choosing a password. Passwords should be easy to remember, but not easily guessed. If written down, passwords should be kept in a secure location.

Accessing the Employee Performance Manager (EPM) System

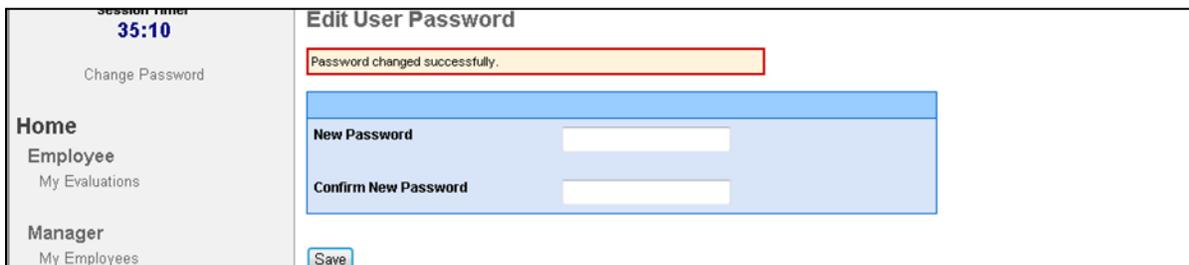
Consider the following when selecting a new password:

- It should not be something that could be easily guessed, such as your birthday, anniversary, nicknames, etc.
- Random selections of letters and numbers are best for maintaining security.
- Passwords are case-sensitive.
- Passwords should be at least 6-8 characters in length.

A security level indicator will display as you begin entering a new password. The recommended maximum security level strength is Excellent. Enter the new password and reenter to confirm.



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



Forgot your Password?

If you forget your password at any time, click on *Forgot Password* and the system will prompt you to reset your password



Accessing the Employee Performance Manager (EPM) System

You will receive a confirmation email notifying you of this request and password reset instructions. If you experience problems signing on, please contact your department's System Administrator.

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:

Accessing Evaluation Records

All Performance Recognition Plan (PRP) eligible employees will be responsible, at least annually to provide a self-evaluation or input to their formal performance appraisal/review by their manager. To access your evaluation records in EPM after signing in the system, the EPM Home Page will display. Click on My Evaluations to access your personal PRP plan document.

Employee Performance Manager

Employee Performance Manager

Session Timer
44:57

Change Password

Home

Employee

My Evaluations

Manager

My Employees

Manager Reports

From the My Evaluations page, select the link that corresponds with the performance evaluation review period. In the example below the 2013 Performance Recognition Plan link is displayed. To access your evaluation record, click the link to select the PRP plan document.

Employee Performance Manager

Session Timer
44:46

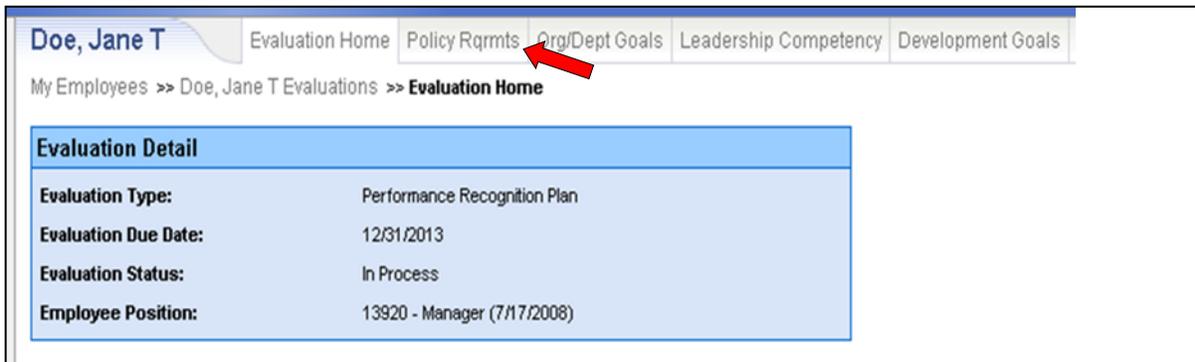
Change Password

My Evaluations

Status	Type	Due Date	
select	In Process	Performance Recognition Plan	12/31/2013

Accessing the Employee Performance Manager (EPM) System

The EPM system PRP plan document template consists of the Evaluation Home Page that displays the pertinent Evaluation Details; Evaluation Type, Due Date, Status and Employee Position. The tabbed headings by section and categories, e.g. Policy Requirement, Org/Dept Goals are displayed below. You must select the individual tab heading to view section criteria, make system entries and save your comments.

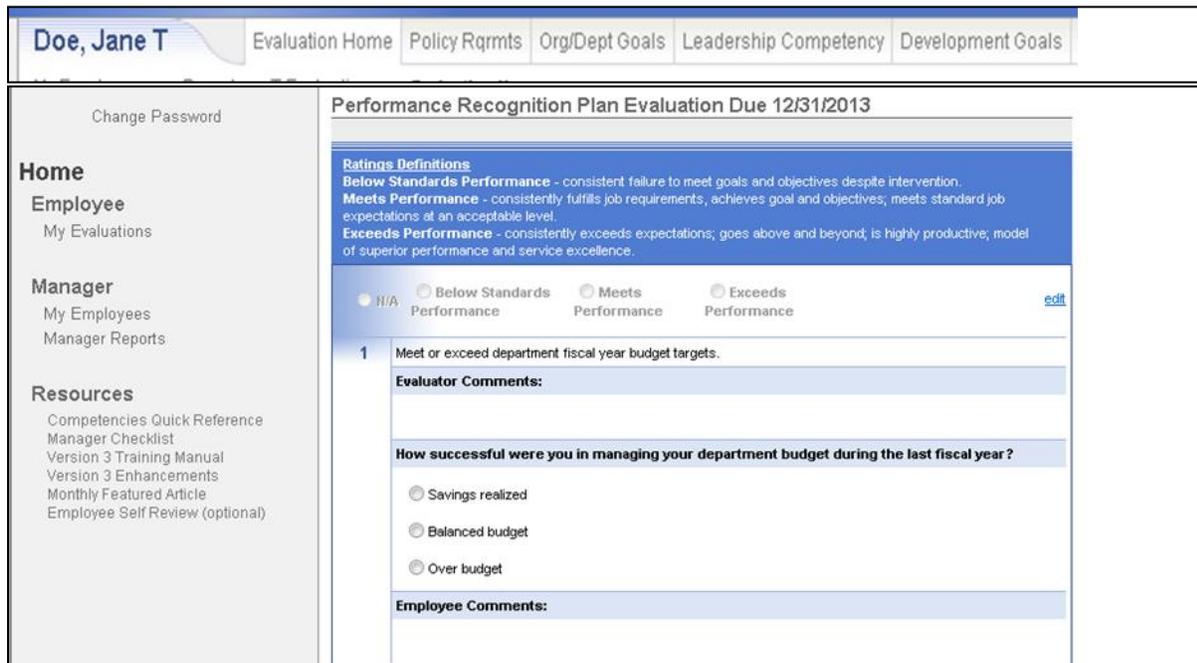


Doe, Jane T				
Evaluation Home	Policy Rqmnts	Org/Dept Goals	Leadership Competency	Development Goals
My Employees >> Doe, Jane T Evaluations >> Evaluation Home				
Evaluation Detail				
Evaluation Type:	Performance Recognition Plan			
Evaluation Due Date:	12/31/2013			
Evaluation Status:	In Process			
Employee Position:	13920 - Manager (7/17/2008)			

All PRP eligible employees will enter comments as part of the self-evaluation process. Click each section tab to enter comments to each section.

Entering Employee Comments PRP Self-Evaluation

All PRP eligible employees must complete a self –evaluation. By selecting each of the PRP Evaluation Document tab headings, e.g. Policy Requirements, Org/Dept Goals, etc., the employee self-evaluation comments may be added to the PRP system evaluation plan/appraisal document. In the example below, the Policy Requirements screen page shown reflects the page view after clicking the corresponding tab heading.



Doe, Jane T				
Evaluation Home	Policy Rqmnts	Org/Dept Goals	Leadership Competency	Development Goals
Change Password				
Performance Recognition Plan Evaluation Due 12/31/2013				
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.				
<input type="radio"/> N/A <input type="radio"/> Below Standards Performance <input type="radio"/> Meets Performance <input type="radio"/> Exceeds Performance edit				
1 Meet or exceed department fiscal year budget targets.				
Evaluator Comments:				
How successful were you in managing your department budget during the last fiscal year?				
<input type="radio"/> Savings realized				
<input type="radio"/> Balanced budget				
<input type="radio"/> Over budget				
Employee Comments:				

Home

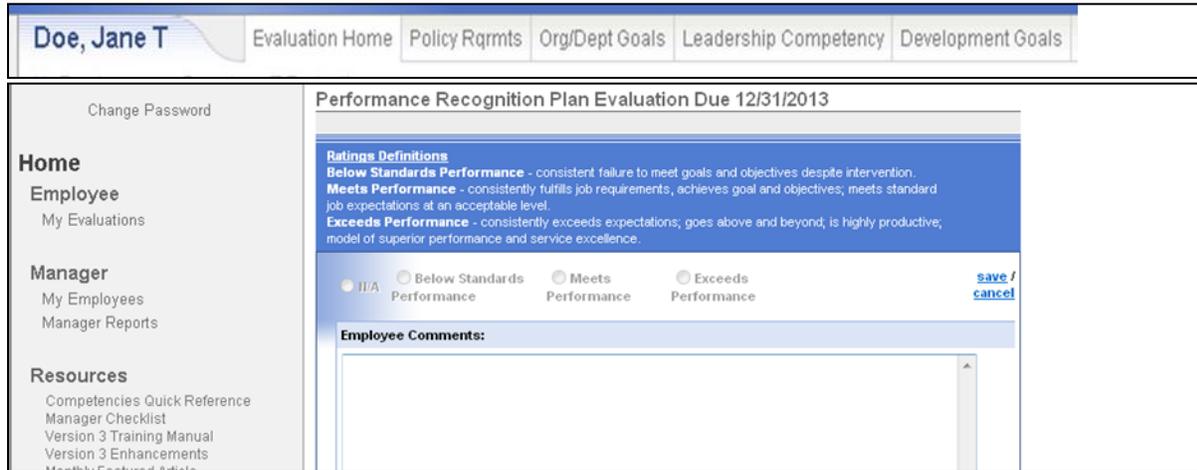
Employee
My Evaluations

Manager
My Employees
Manager Reports

Resources
Competencies Quick Reference
Manager Checklist
Version 3 Training Manual
Version 3 Enhancements
Monthly Featured Article
Employee Self Review (optional)

Accessing the Employee Performance Manager (EPM) System

To add Employee Comments, click Edit as shown in the screen print above to open the Employee Comments text box.

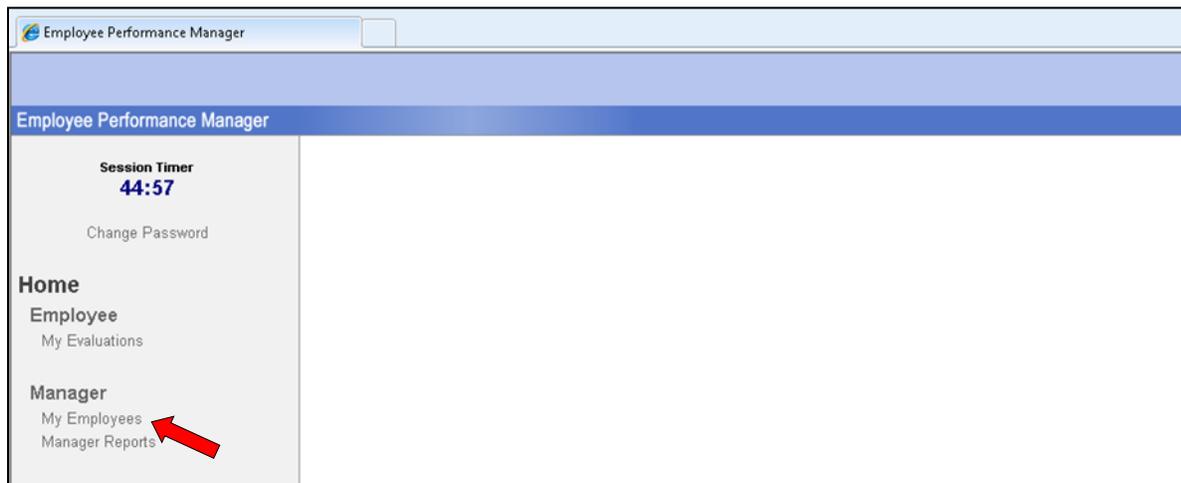


After clicking Edit, type your comments in the text box and save your entries. To add Employee Comments under the Org/Dept Goals, Leadership Competency Sections, etc. follow the steps as outlined in this section of the user guide.

System safeguards are set to restrict the employee view of Evaluator/Manager Ratings and Comments while the PRP evaluation/appraisal is in progress. Entries will be accessible by the PRP eligible employee after the system evaluation is finalized by the manager. As appropriate, certain access rights may be granted by an authorized system administrator or County Human Resources authorized user.

Adding Evaluator Comments, Entering Evaluation Criteria and Ratings

Evaluators/Managers comments and ratings will be added to the PRP system evaluation document as part of the annual performance plan/appraisal review process. From the EPM Home Page the manager will select "My Employees"



My Employees screen page will display a list of your direct reports. PeopleSoft reporting records must be accurate to view and access your direct reports performance plan/appraisal records in EPM.

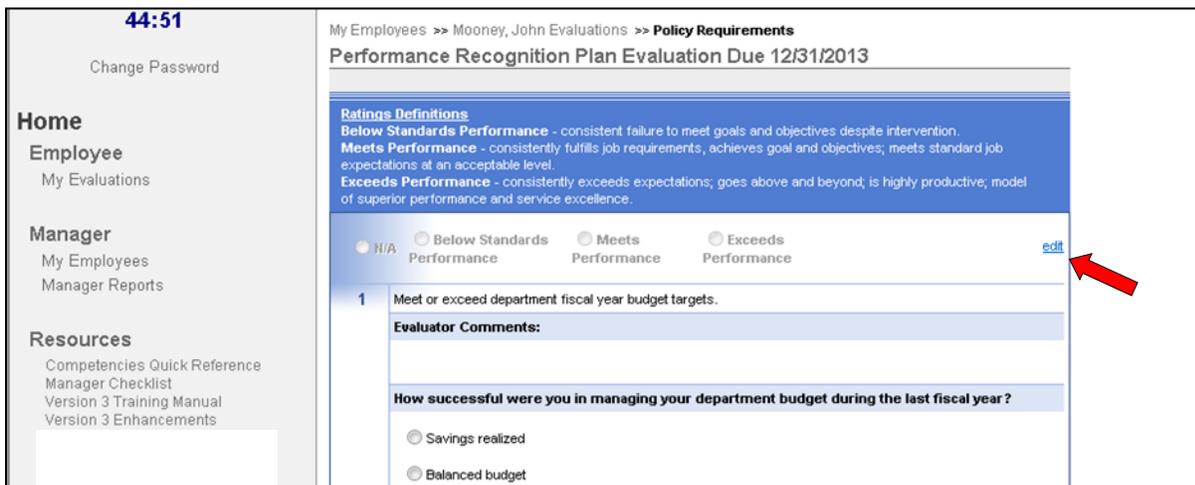
Accessing the Employee Performance Manager (EPM) System

In the example below there is one direct report evaluation record displayed. A list of all your direct reports will display on the My Employees screen page according to reporting relationships maintained in the PeopleSoft system.



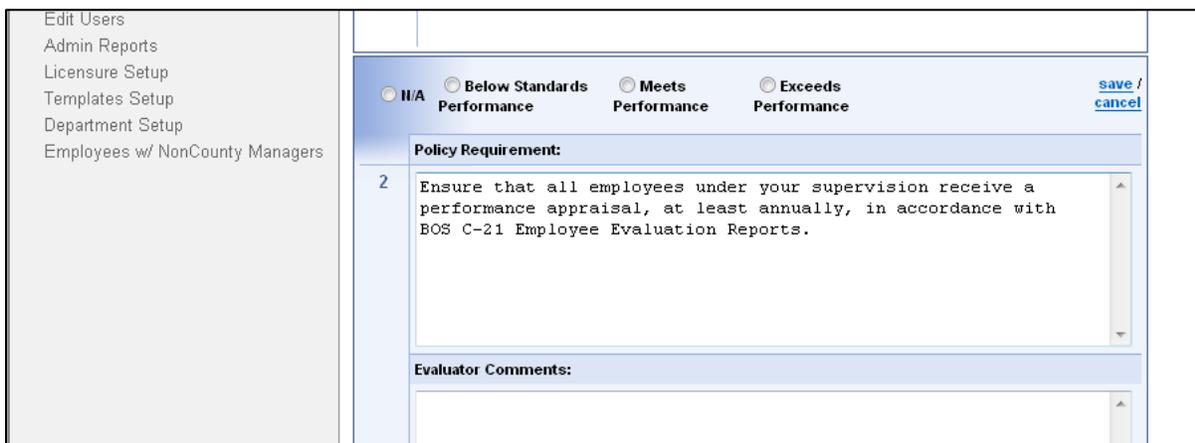
The screenshot shows the 'Employee Performance Manager' interface. On the left is a navigation menu with sections: 'Home' (Employee, My Evaluations), 'Manager' (My Employees, Manager Reports), and 'Resources'. The main area is titled 'My Employees' and contains a table with columns 'Employee ID' and 'Employee Name'. One record is shown: Employee ID '000000' and Employee Name 'Doe, Jane T'. A red arrow points to the word 'select' in the first column of this record.

To add Evaluator/Manager Comments, click Edit as shown in the screen print below to open the Evaluator/Manager Comments text box.



The screenshot shows the 'Performance Recognition Plan Evaluation Due 12/31/2013' screen. The left navigation menu is similar to the previous screenshot. The main area shows a breadcrumb trail: 'My Employees >> Mooney, John Evaluations >> Policy Requirements'. Below this is a section for 'Ratings Definitions' with three options: 'Below Standards Performance', 'Meets Performance', and 'Exceeds Performance'. A red arrow points to the 'edit' link next to the 'Exceeds Performance' option. Below the ratings is a list of policy requirements, with the first one being '1 Meet or exceed department fiscal year budget targets.' Below this is a text box for 'Evaluator Comments:' and a question: 'How successful were you in managing your department budget during the last fiscal year?' with radio button options for 'Savings realized' and 'Balanced budget'.

To add Evaluator/Manager Comments, click Edit as shown in the screen print above to open the comments text box. After clicking Edit, type your comments in the text box and save your entries.



The screenshot shows the 'Evaluator Comments' text box. The left navigation menu is similar to the previous screenshots. The main area shows a breadcrumb trail: 'My Employees >> Mooney, John Evaluations >> Policy Requirements'. Below this is a section for 'Ratings Definitions' with three options: 'Below Standards Performance', 'Meets Performance', and 'Exceeds Performance'. A red arrow points to the 'save / cancel' link next to the 'Exceeds Performance' option. Below the ratings is a list of policy requirements, with the second one being '2 Ensure that all employees under your supervision receive a performance appraisal, at least annually, in accordance with BOS C-21 Employee Evaluation Reports.' Below this is a text box for 'Evaluator Comments:'.

Accessing the Employee Performance Manager (EPM) System

To add comments under the remaining Org/Dept Goals, Leadership Competency Sections, etc. click on the respective tabbed headings and follow the same steps as outlined in this section of the user guide.



System safeguards restricting viewing of entries made by the evaluator by the employee being evaluated, e.g. comments and ratings while the PRP evaluation/appraisal is in progress may be set. The Evaluator/Manager or Human Resources Administrator will establish the restrict/view settings. The Evaluator/Manager entries are viewable by the PRP eligible employee after the system evaluation is finalized or as granted by the manager or other human resources department system administrator authorized user.

A screenshot of the 'Performance Recognition Plan Evaluation Due 12/31/2013' interface. The left sidebar contains navigation links for 'Home', 'Employee' (My Evaluations), and 'Manager' (My Employees, Manager Reports). The main content area shows 'Ratings Definitions' for 'Below Standards Performance', 'Meets Performance', and 'Exceeds Performance'. Below this is a table with one row: '1 Meet or exceed department fiscal year budget targets.' The 'Evaluator Comments' section is currently hidden, with a 'Hide' link on the right. A red arrow points to this 'Hide' link. Below the table is a question: 'How successful were you in managing your department budget during the last fiscal year?' with radio button options for 'Savings realized' and 'Balanced budget'.

	<input type="radio"/> N/A	<input type="radio"/> Below Standards Performance	<input type="radio"/> Meets Performance	<input type="radio"/> Exceeds Performance	edit / delete
1					

Please contact your Human Resources Services Manager to set up a system overview, if required or to schedule additional system training for your group, contact Vivian Nunez at 951-955-2322 or micro 52322.