



Orange County Government
Supervisor's Step-by-Step Guide to
ePerformance Management

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OVERVIEW

Performance Process Steps

Step 1: Define Criteria

Update and Approve the Goals entered by the Employee

- During this step the employee should identify the goals that need to be accomplished during the performance period.
- Any core responsibilities or competencies not already defined should be added.
- The manager should review the goals and other performance content.
- When complete, the manager should mark this step as approved.

Step 2: Nominate Participants (Optional)

Select Nominees and Request 360 Feedback

- Nominate the individuals that should provide 360-degree feedback on the employee's performance.
- Once the Finalize Criteria Step is complete the nominations can be submitted to the nominees for their acceptance.
- Use the Track Nominations step to review which nominees accepted the nominations. This step may or may not be available.

Step 3: Review Participants' Evaluations

Review the feedback given by the 360 reviewers

- View the status of each Participant Evaluation that has been accepted.
- Select the Participant Evaluation you wish to review.

Step 4: Review Self-Evaluation

Review Employee Self-Evaluation

- During this step, the employee should rate themselves on their performance and add their comments to the document.
- When finished the employee should select the complete button to submit the document to their manager for review.

Step 5: Complete Manager Evaluation

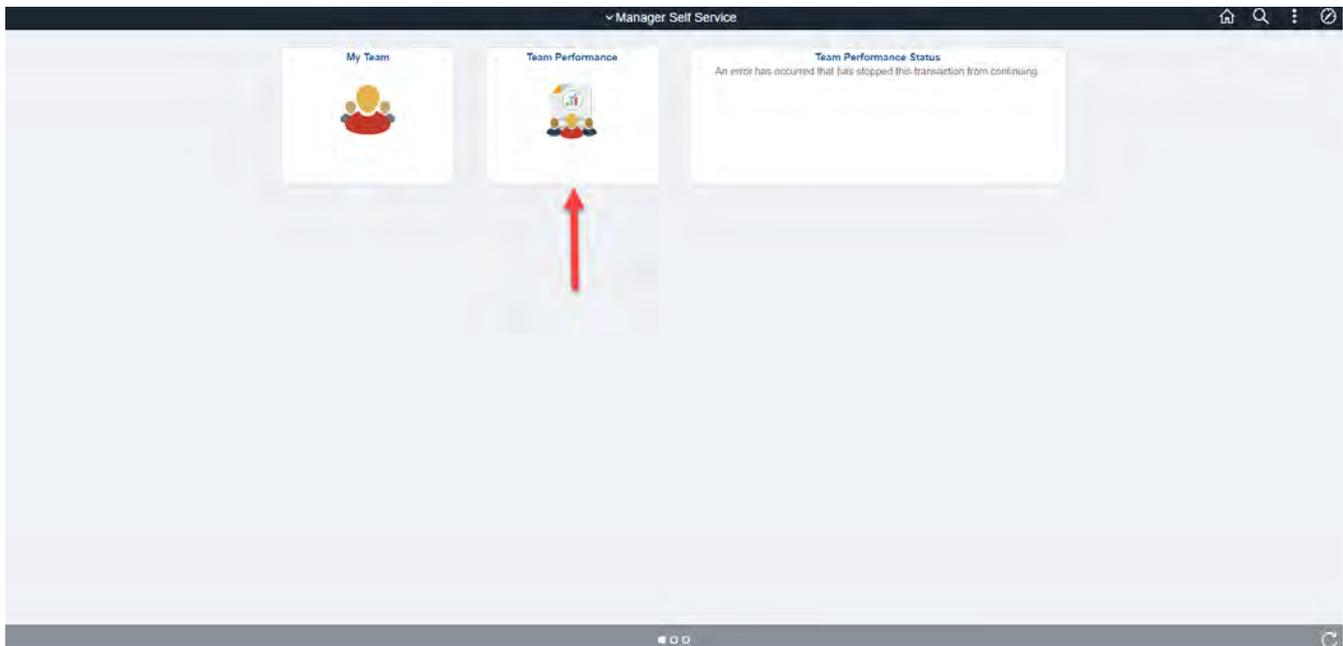
Enter Ratings and Comments, Review with Employee, Request Acknowledgement, and Submit for Approval

- During this step, the manager should rate the employee's performance and add their comments to the document.
- When complete the manager should share their comments with the employee and conduct their review.

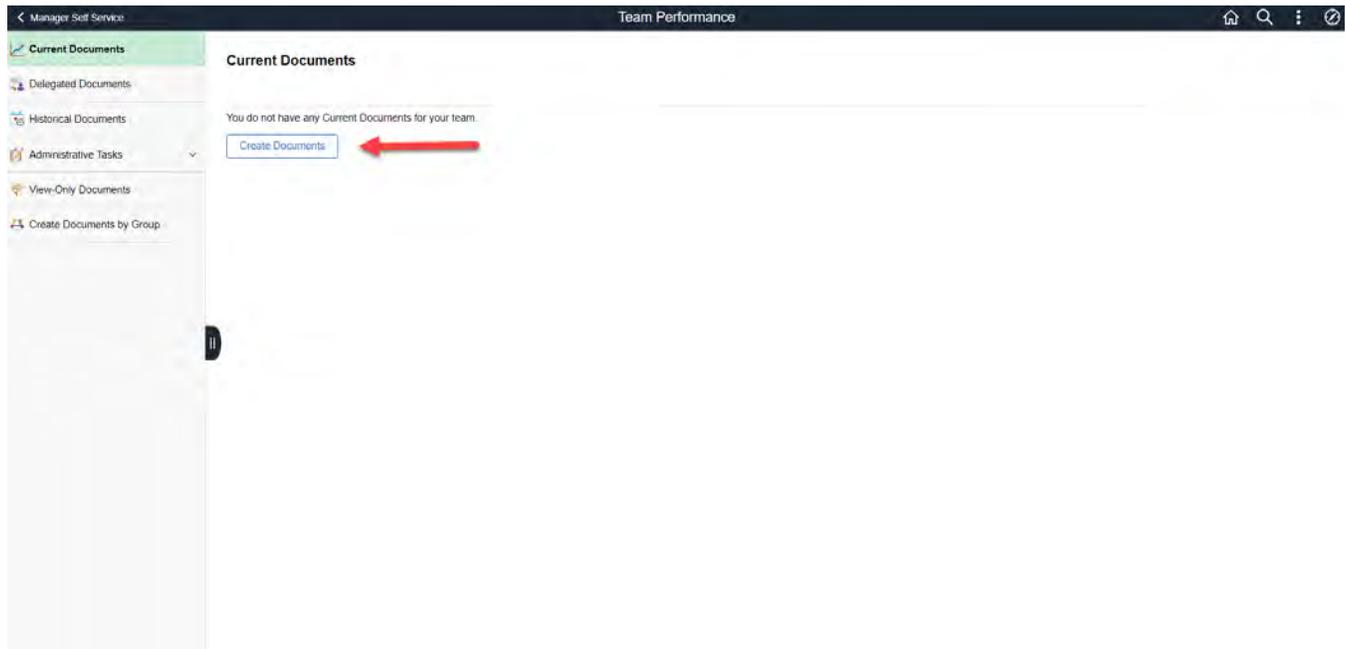
- After the review has been held the manager should request that the employee acknowledges the document.
- After the document has been acknowledged by the employee, the manager should select the submit for approval button.
- Once the document is approved the status of the document will be automatically set to complete and will be found under Historical Documents.

BEGINNING AN EVALUATION

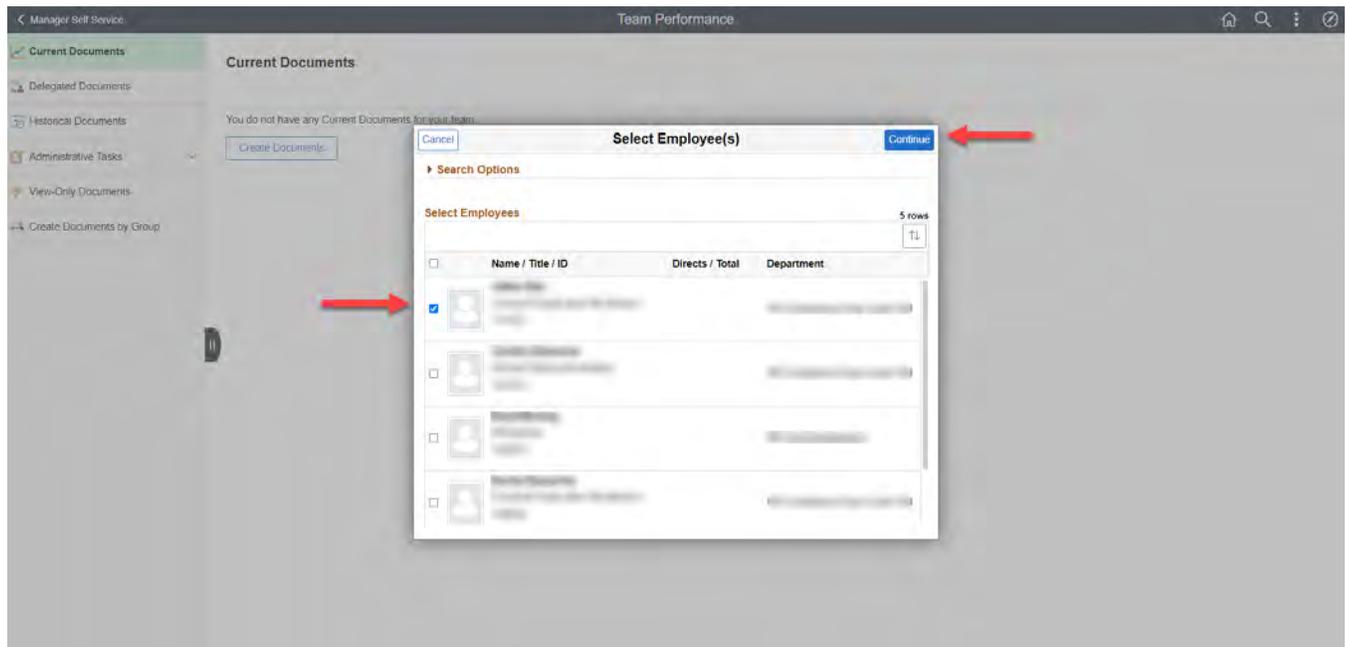
1. Log in to MyOCPortal, and ensure you are on the “Manager Self Service” tab located at the center top of the page. Click on the “Team Performance” tile.



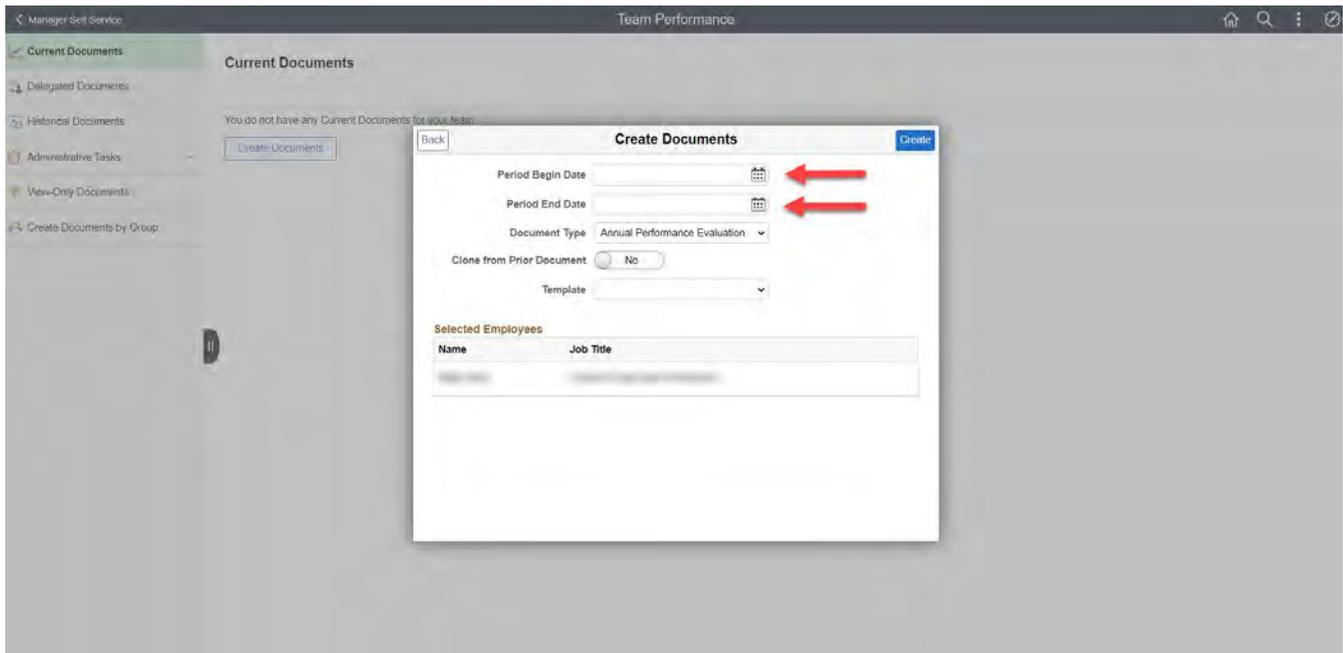
2. Click on “Create Documents.”



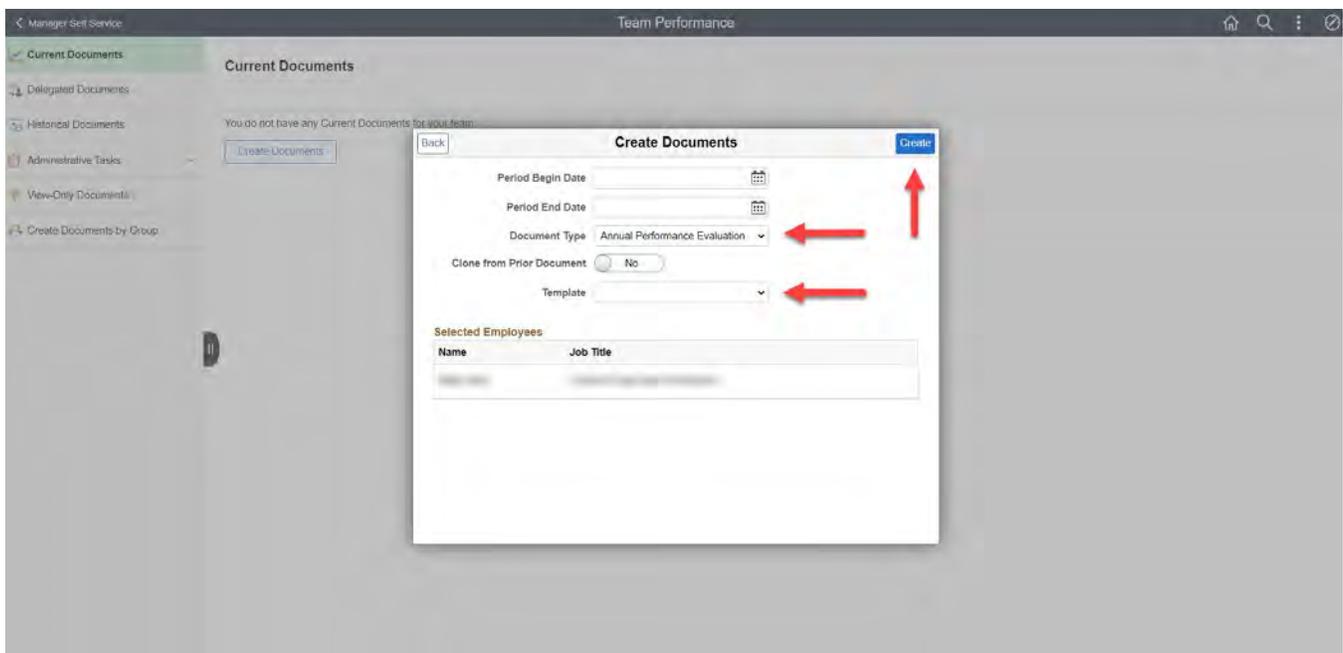
3. Select the employee you would like to work on by checking the box next to their name and press “Continue.”



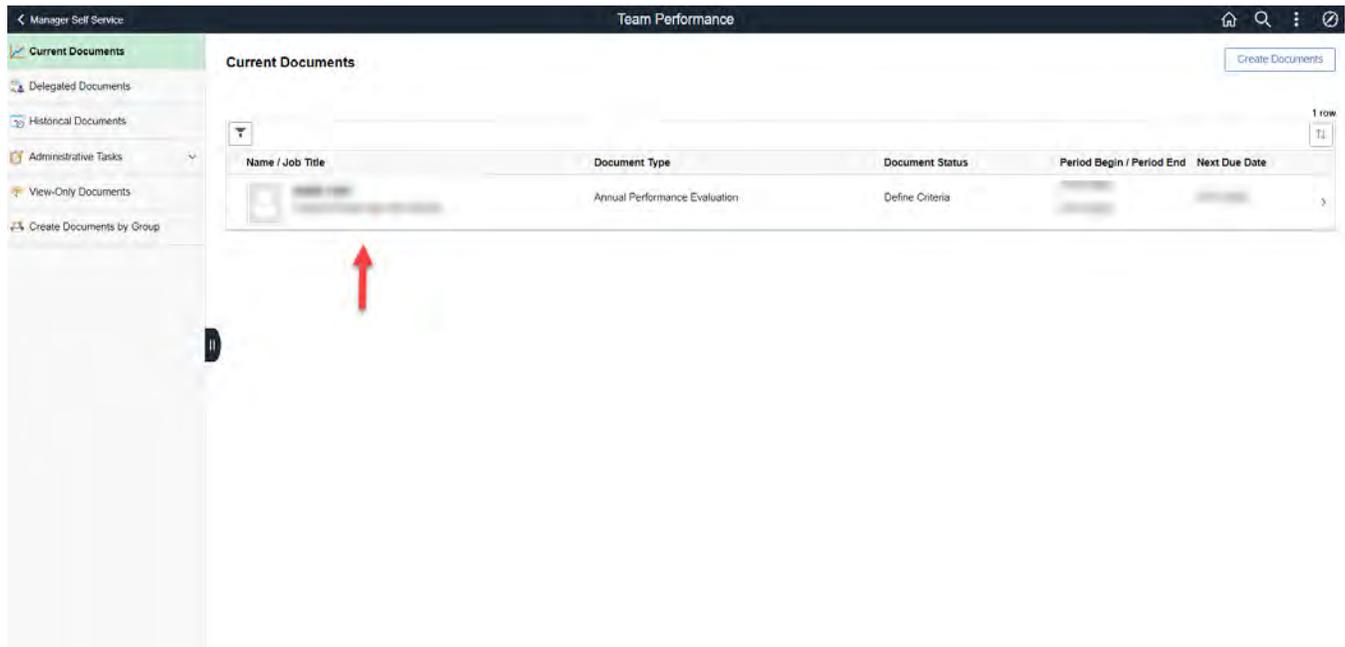
4. The form will ask what the start and end dates are for the employee. If it is NOT a new employee, these dates will be the beginning and end of the review cycle (9/16 of the previous year and 9/15 of the current year). If the employee IS new, the “Period Begin Date” will be their hire date and the “Period End Date” will be 9/15 of the current year.



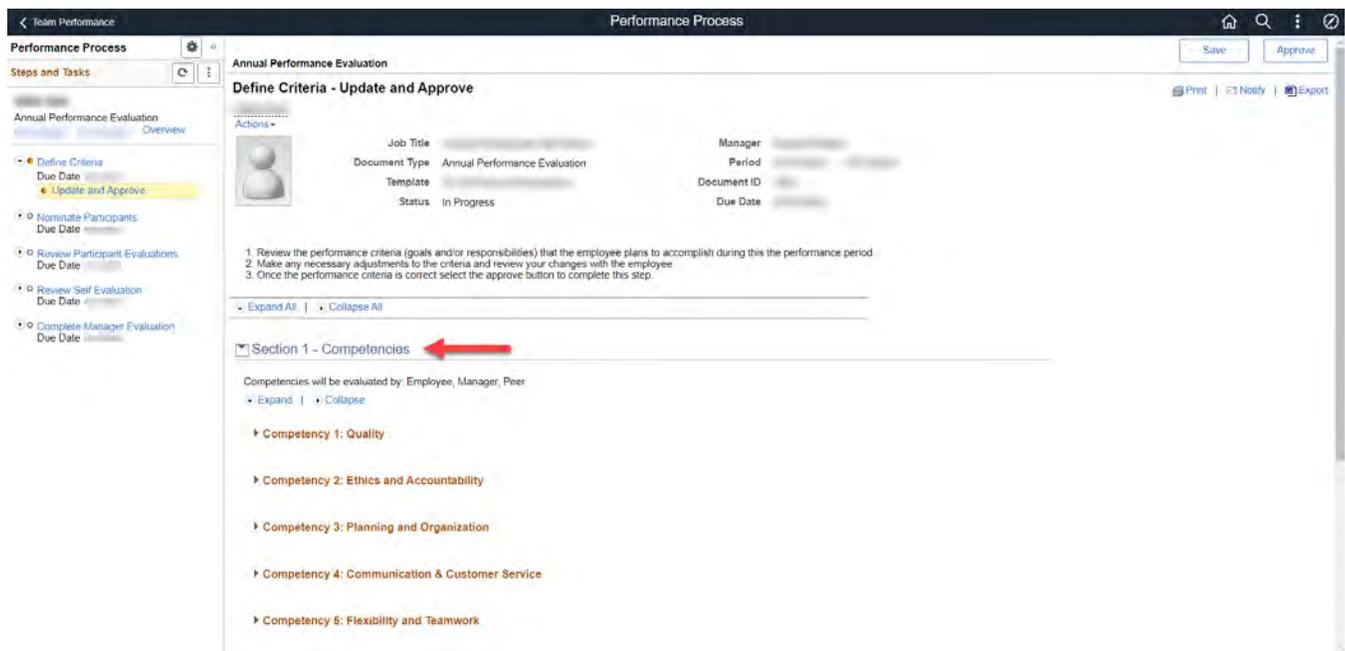
5. The “Document Type” will default to “Annual Performance Evaluation.” Select the “Template” dropdown menu and select the appropriate evaluation depending on the employee you are rating. When you are done, select “Create.”



6. You will be returned to the “Current Documents” screen. Click on the document you just created.

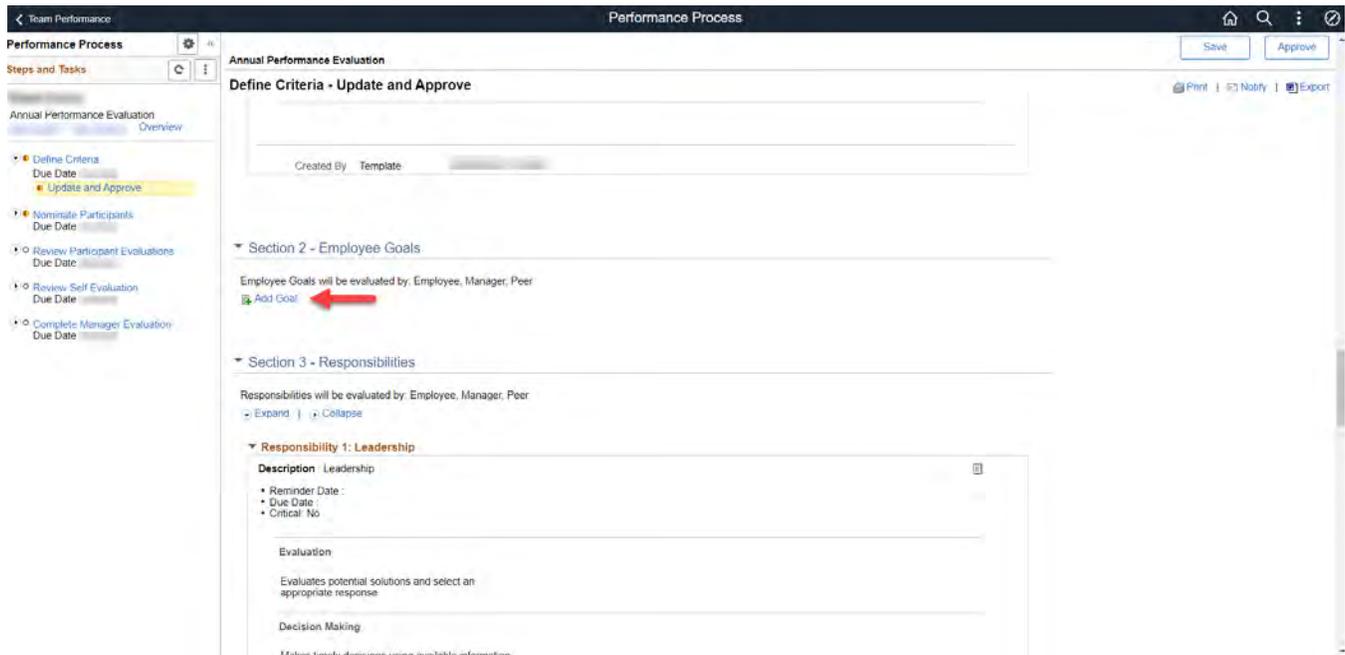


7. You will see the main page for developing your Performance Management Document. If you selected a *supervisor* evaluation, you will see headers titled “Competencies,” “Employee Goals,” and “Responsibilities.” All other employees will only have headers titled “Competencies” and “Employee Goals.” It is recommended to begin/open evaluations for your entire team before moving forward with goals to expedite the process.



ENTERING GOALS

1. “Employee Goals” has replaced “Position Specific Elements” on prior evaluations. Completing this section is highly recommended. To add an employee goal, scroll down to the header titled “Employee Goals” and click “Add Goal.”



Team Performance Performance Process

Performance Process

Steps and Tasks

Annual Performance Evaluation

Define Criteria - Update and Approve

Created By Template

Section 2 - Employee Goals

Employee Goals will be evaluated by Employee, Manager, Peer

Add Goal

Section 3 - Responsibilities

Responsibilities will be evaluated by Employee, Manager, Peer

Expand Collapse

Responsibility 1: Leadership

Description Leadership

- Reminder Date
- Due Date
- Critical No

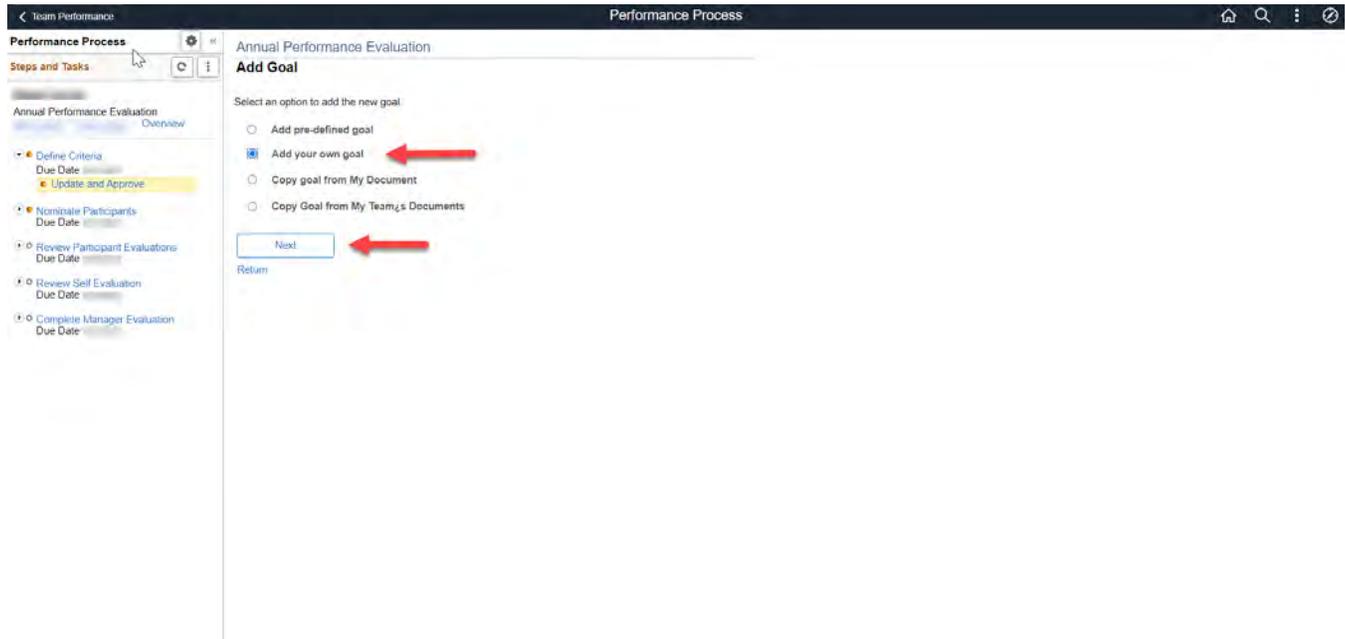
Evaluation

Evaluates potential solutions and select an appropriate response

Decision Making

Make funds determine some available information

2. Click the radial button to select “Add Your Own Goal” and click “Next.”



Team Performance Performance Process

Performance Process

Steps and Tasks

Annual Performance Evaluation

Add Goal

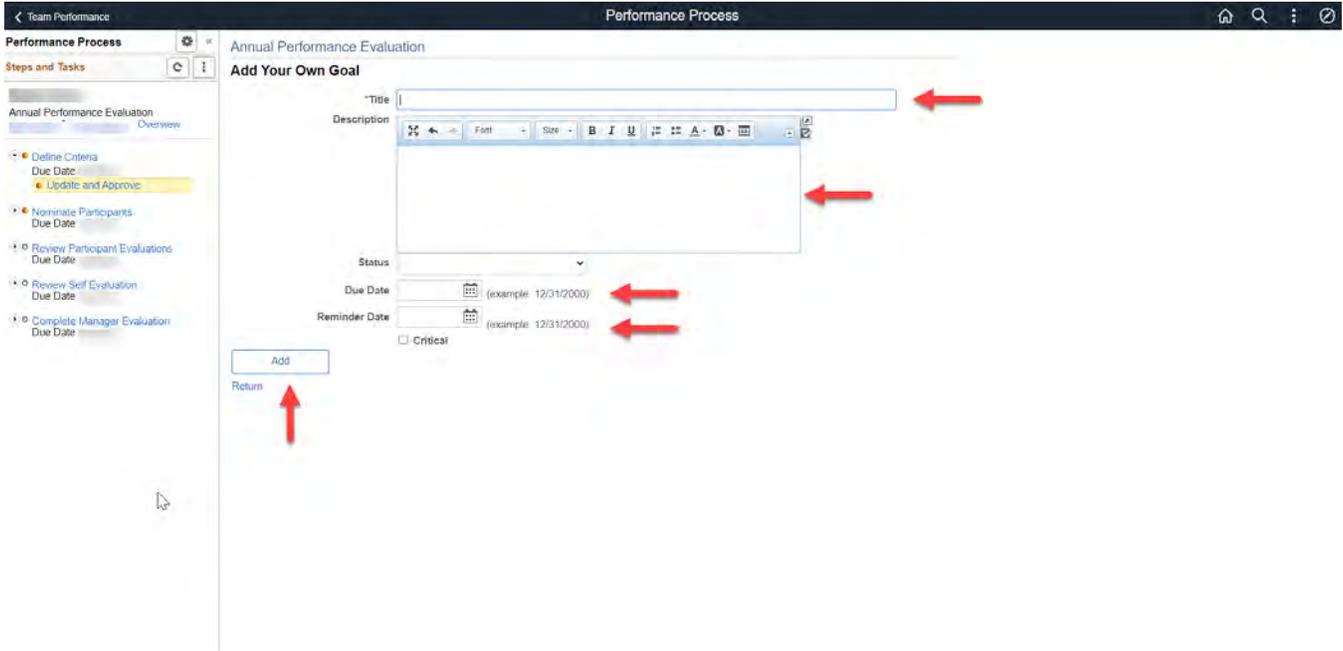
Select an option to add the new goal.

- Add pre-defined goal
- Add your own goal
- Copy goal from My Document
- Copy Goal from My Team's Documents

Next

Return

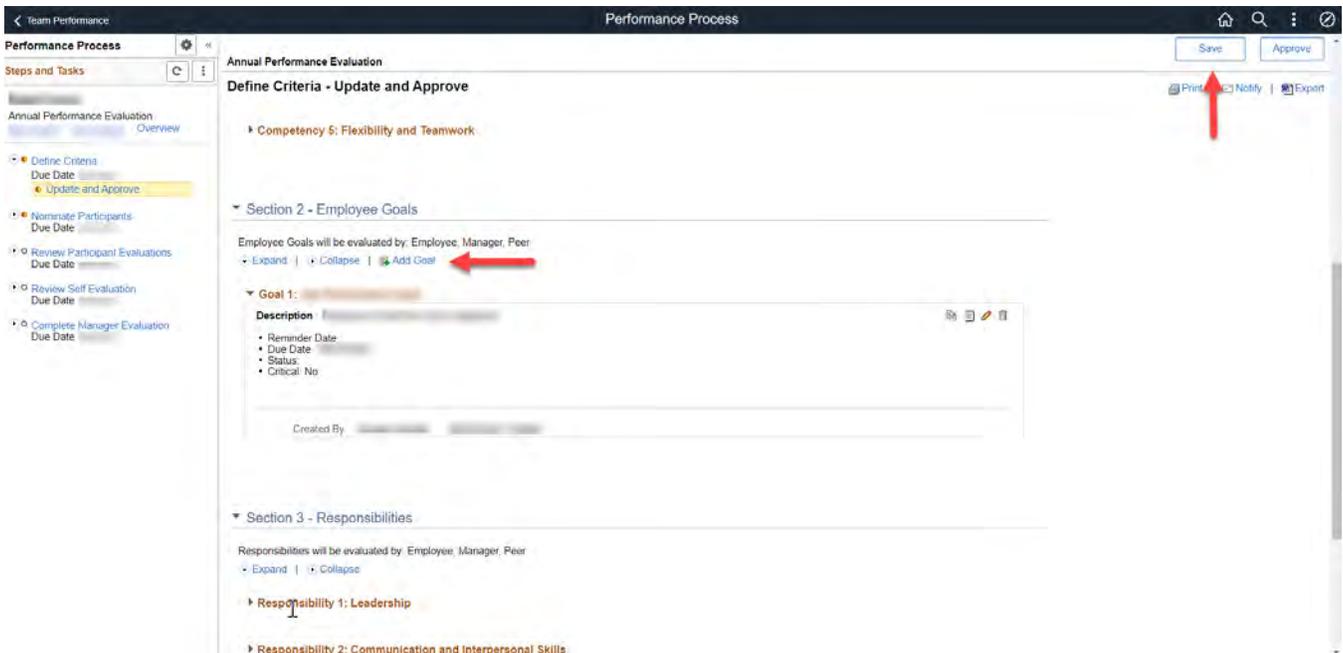
- On the goal entry page, enter a title for the goal. You are able to enter a description, a status of “Complete,” “In Process,” or “Not Applicable,” add a due date, and a reminder to the employee to accomplish the goal. Once all information is entered, click “Add.”



The screenshot shows the 'Add Your Own Goal' form within the 'Annual Performance Evaluation' section. The form contains the following fields and controls:

- Title:** A text input field with a red arrow pointing to it.
- Description:** A rich text editor area with a red arrow pointing to it.
- Status:** A dropdown menu with a red arrow pointing to it.
- Due Date:** A date picker field with a red arrow pointing to it.
- Reminder Date:** A date picker field with a red arrow pointing to it.
- Critical:** A checkbox labeled 'Critical' with a red arrow pointing to it.
- Buttons:** 'Add' and 'Return' buttons at the bottom left, with red arrows pointing to them.

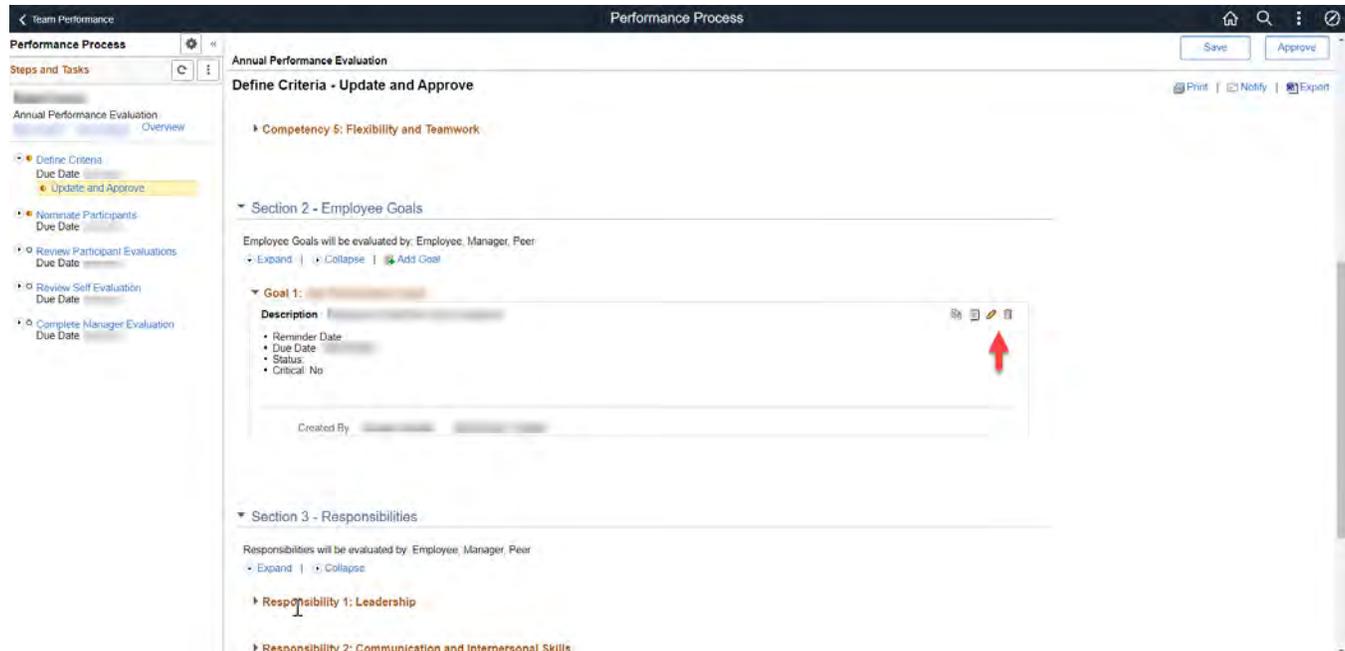
- You will return to the evaluation page where you can continue adding goals by clicking the “Add Goal” button. Repeat the process as needed until all desired goals are entered. Be sure to save your work intermittently or all entered goals will be lost.



The screenshot shows the 'Define Criteria - Update and Approve' page. The page includes the following elements:

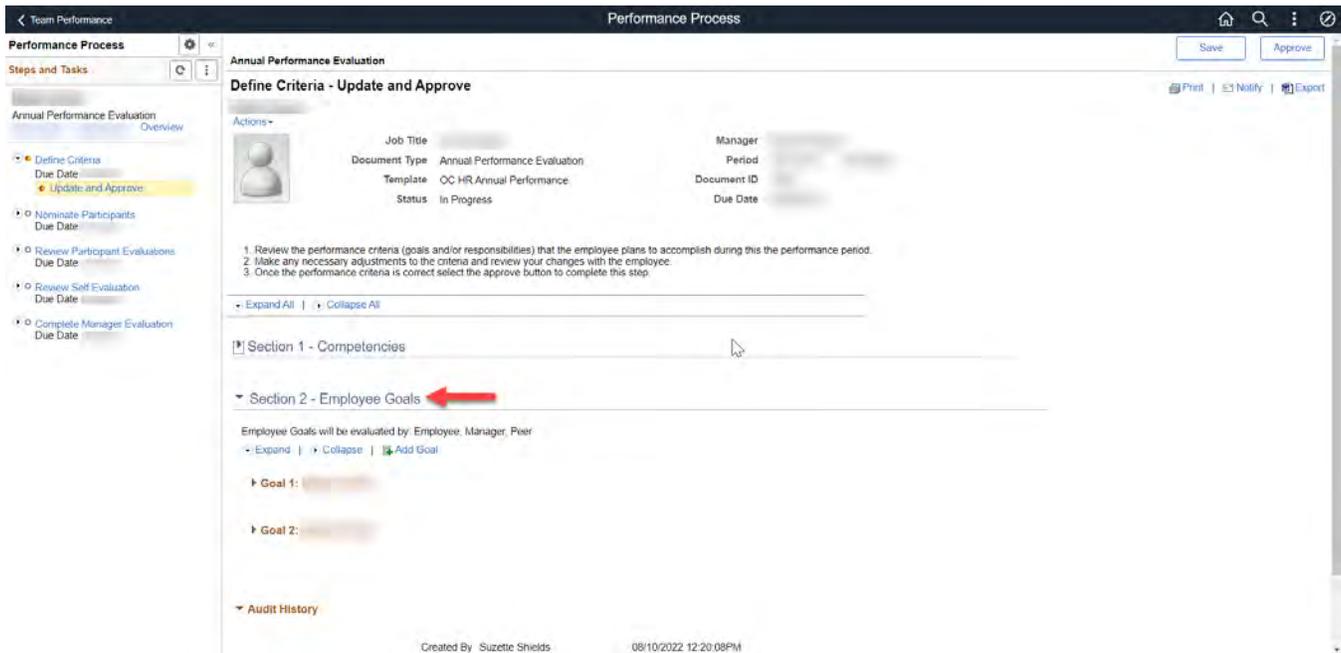
- Navigation:** 'Save' and 'Approve' buttons at the top right, with a red arrow pointing to the 'Save' button.
- Criteria List:** A list of criteria, including 'Competency 5: Flexibility and Teamwork'.
- Section 2 - Employee Goals:** A section with a red arrow pointing to the 'Add Goal' button.
- Goal 1:** A detailed view of a goal with fields for Description, Reminder Date, Due Date, Status, and Critical.
- Section 3 - Responsibilities:** A section with a list of responsibilities, including 'Responsibility 1: Leadership' and 'Responsibility 2: Communication and Interpersonal Skills'.

- If you need to edit or delete an entered goal, use the pencil button to edit, or the trash button to delete the goal.

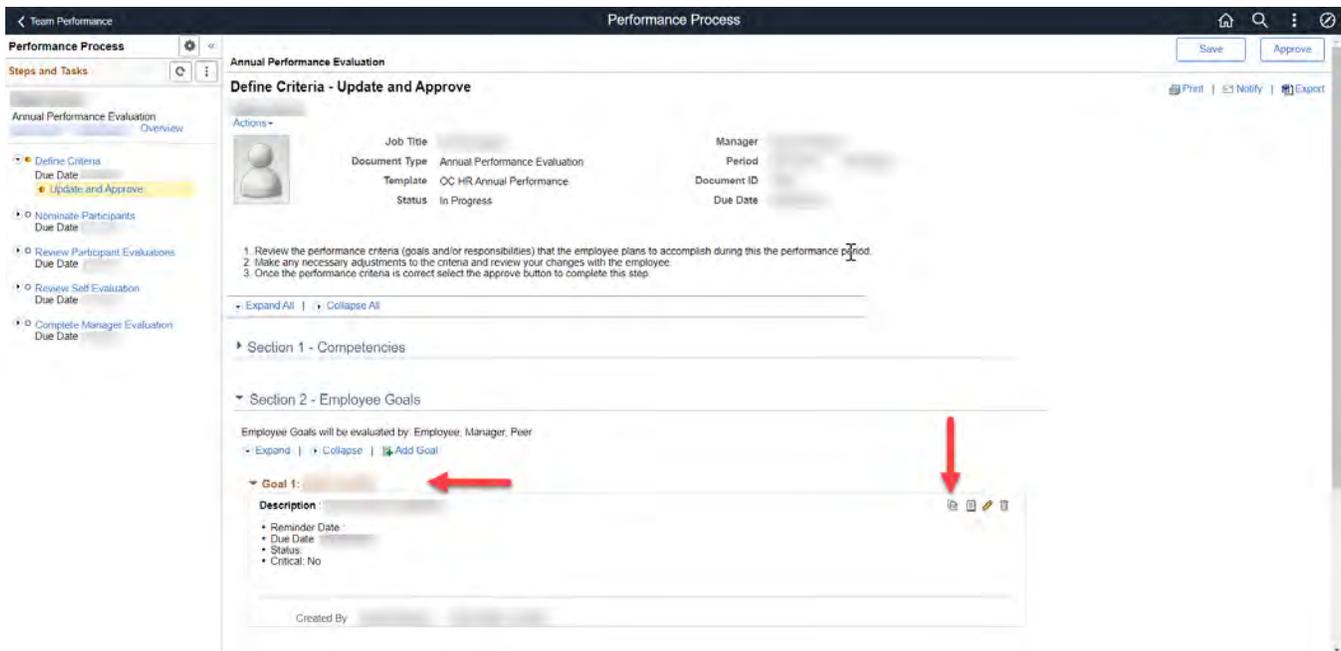


Copying Goals To Another Team Member

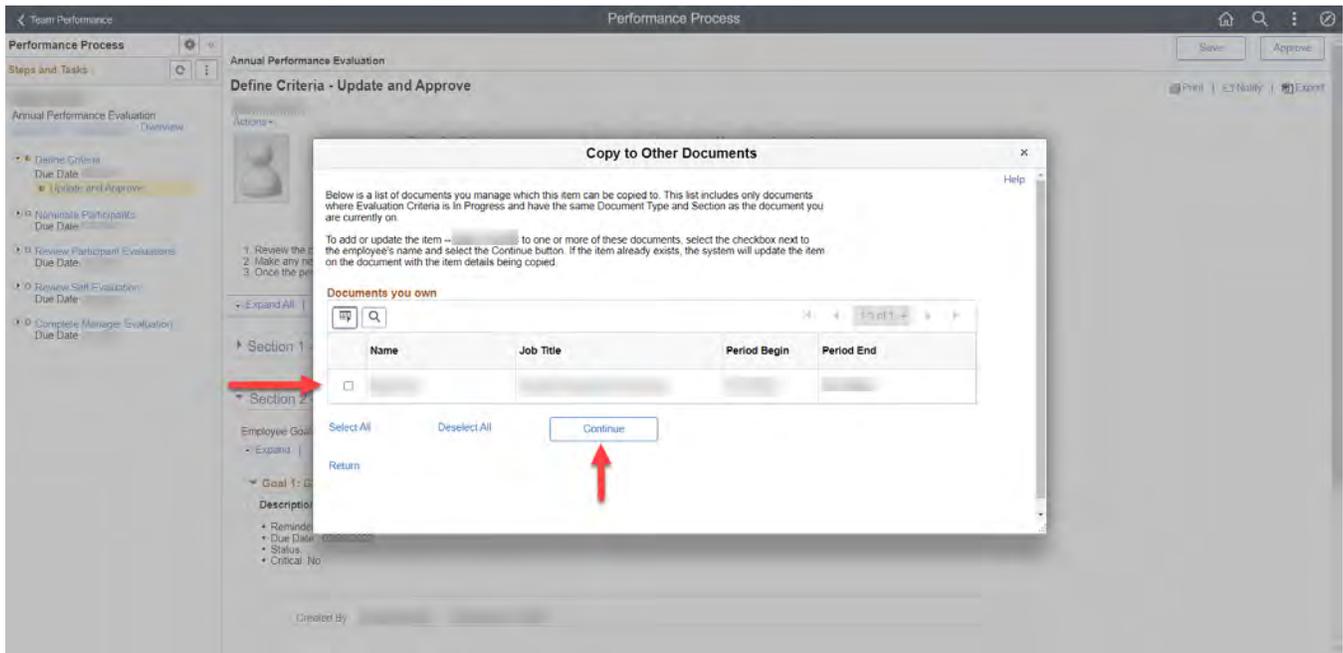
- In order to expedite the process of adding goals to each employee's evaluation, you can copy goals from a member of your team to another member of your team. Begin by opening evaluations on all employees separately (See: [Beginning an Evaluation](#)). Then, enter all applicable goals for one member of your team (See: [Entering Goals](#)). **Note: This process must be completed prior to approving the evaluation criteria when the evaluations are still in "Define Criteria" mode.**



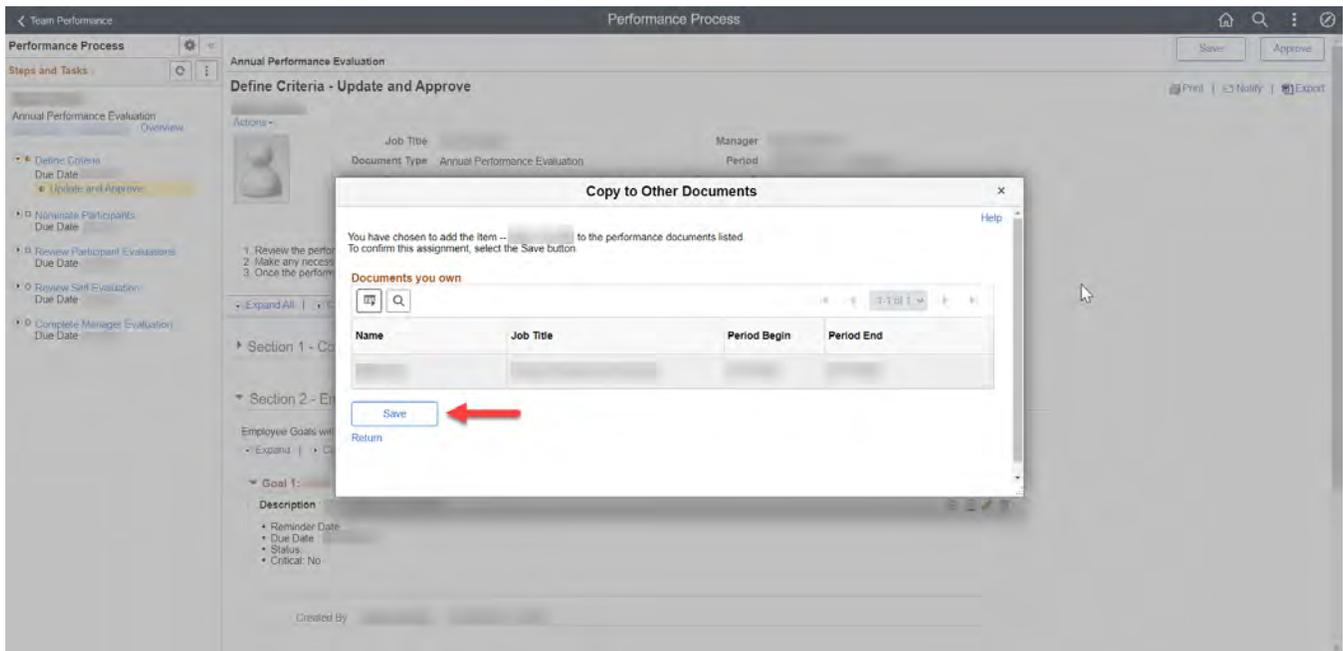
2. Once you have entered all applicable goals for a member of your team, you can assign the same goals to other team members. Begin by clicking on the goal you wish to copy to other members of your team, then click on the duplicate/copy icon.



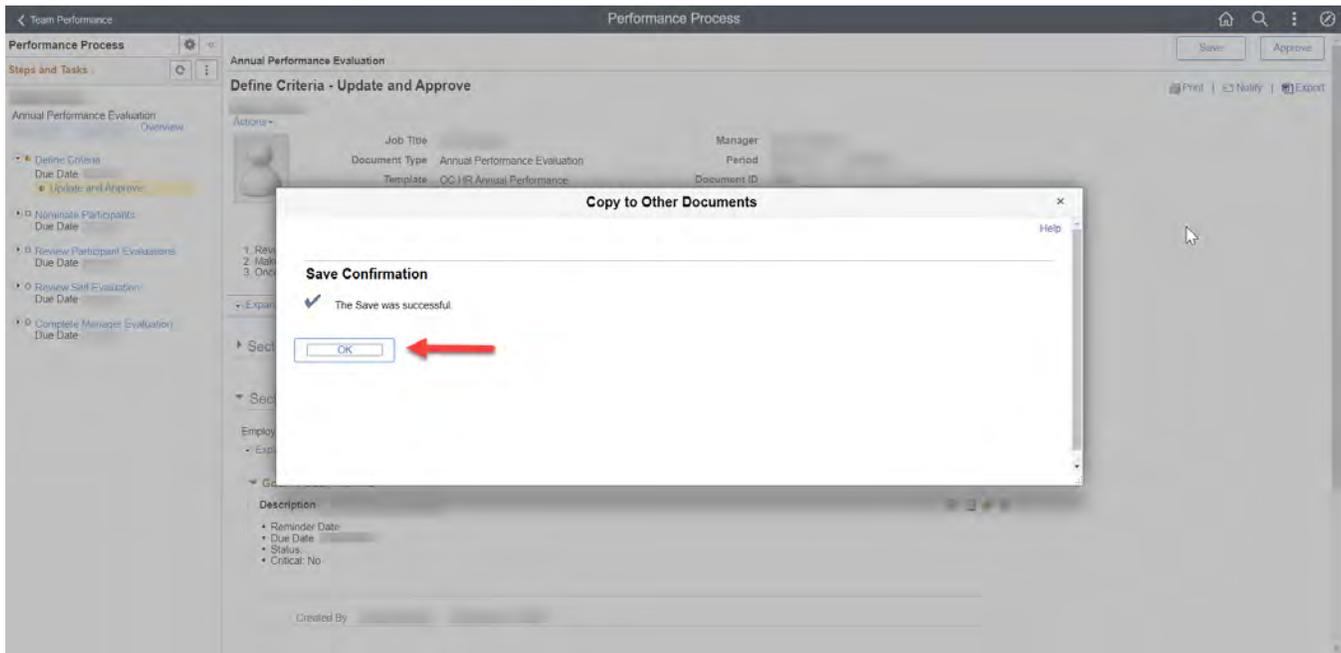
3. A pop-up menu will appear with all other available evaluations for your team members. Check the box next to the team member you wish to copy the goal to, and click the "Continue" button.



4. A confirmation box will appear, click "Save" to confirm copying the goal.



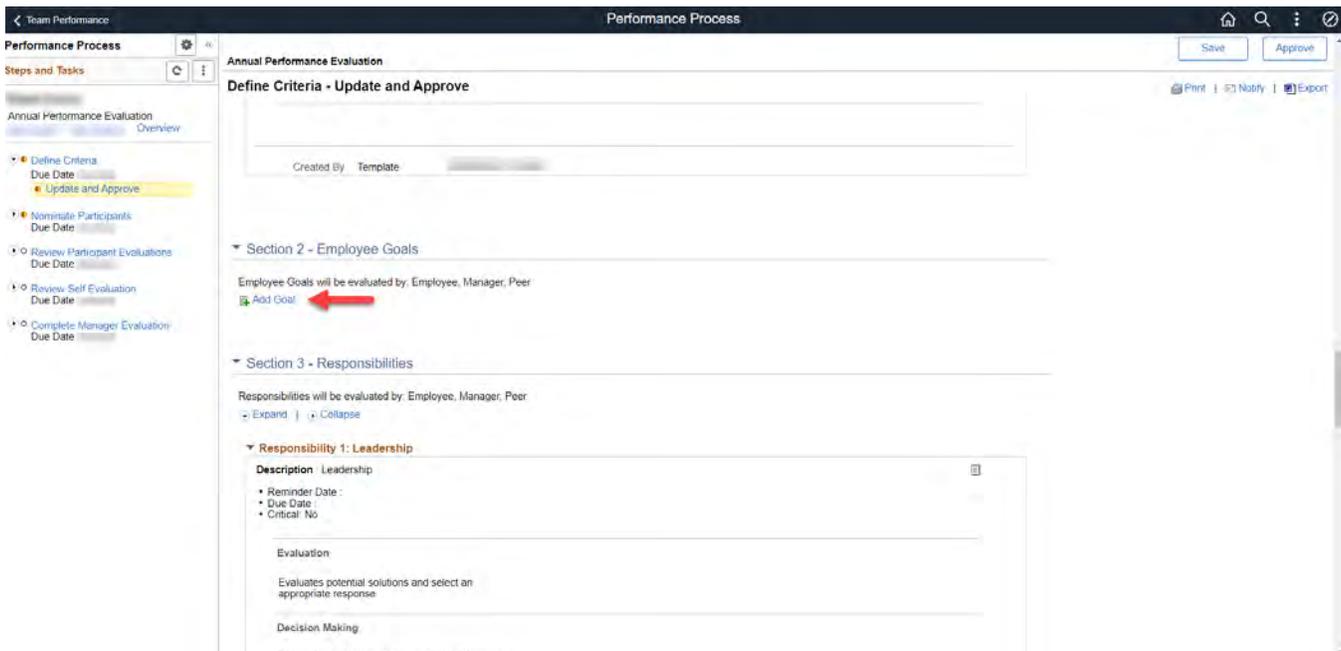
5. Click "OK" to acknowledge the success of the copied goal.



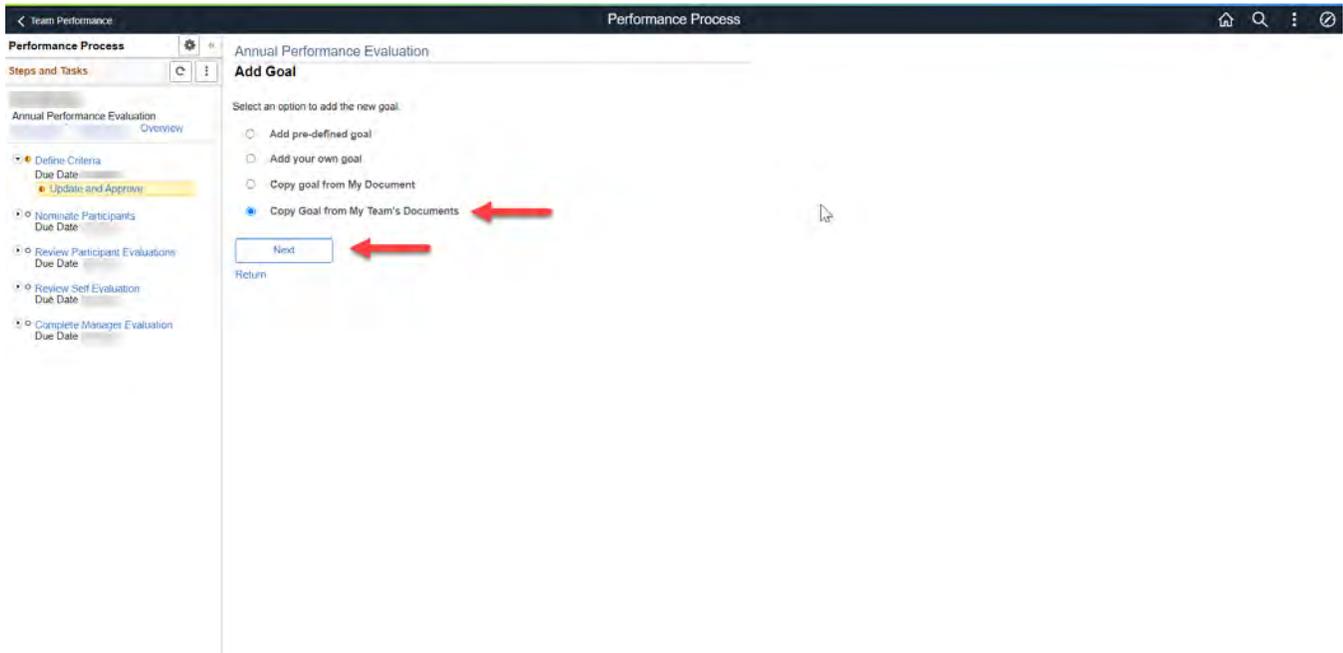
Copying Goals From Another Team Member

If you are in a team member’s evaluation and you would like to copy goals you already entered from another team member’s evaluation, you can do so by completing the following steps.

1. Once you are in the team member’s evaluation you wish to add goals to, click “Add Goals.”



2. Click the radial button next to “Copy Goal from My Team’s Documents” and click the “Next” button.



Team Performance Performance Process

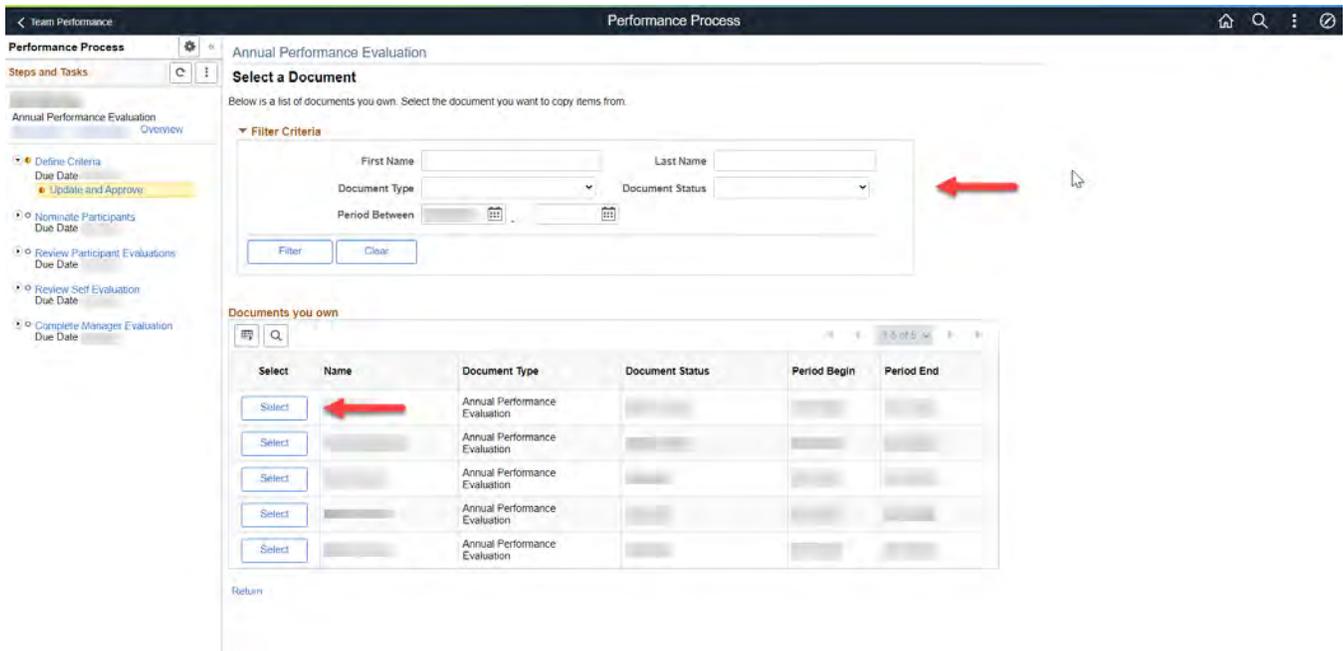
Annual Performance Evaluation

Add Goal

Select an option to add the new goal.

- Add pre-defined goal
- Add your own goal
- Copy goal from My Document
- Copy Goal from My Team's Documents

3. You may utilize a filter to locate the evaluation you wish to copy from, or simply select the evaluation from the list at the bottom of the page. Click the “Select” button next to the evaluation you wish to copy goals from.



Team Performance Performance Process

Annual Performance Evaluation

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Filter Criteria

First Name Last Name

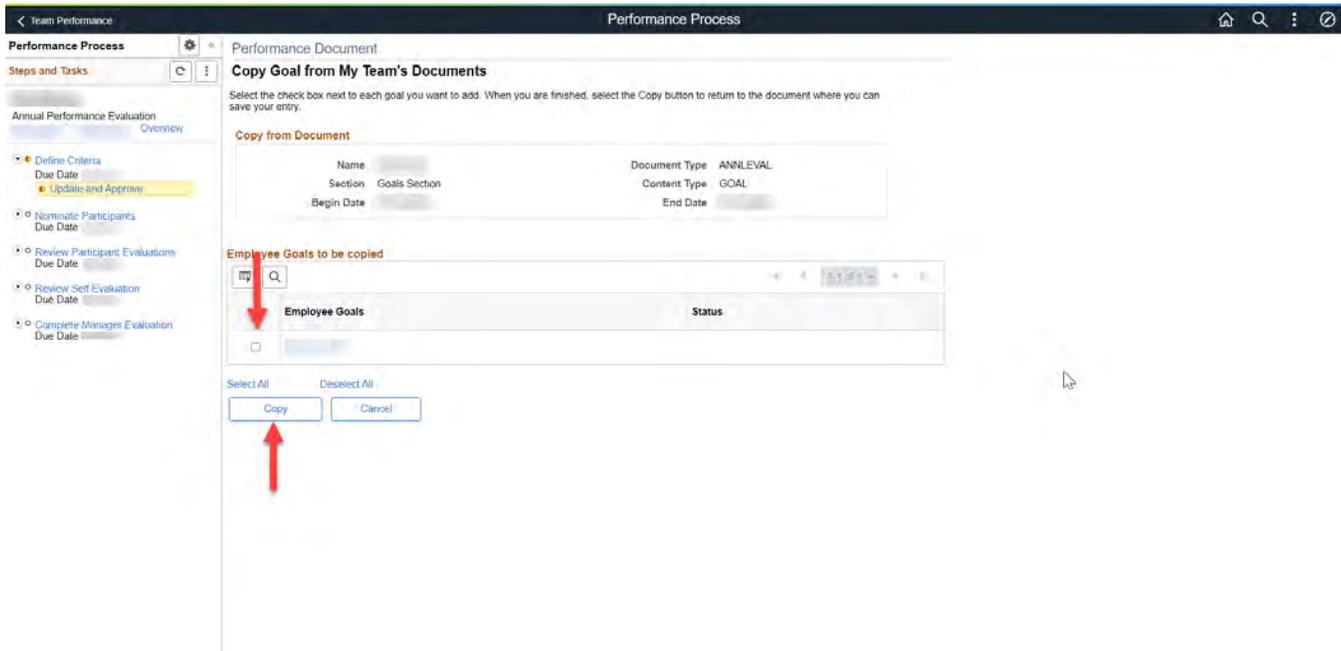
Document Type Document Status

Period Between

Documents you own

| Select | Name | Document Type | Document Status | Period Begin | Period End |
|--|------------|-------------------------------|-----------------|--------------|------------|
| <input checked="" type="button" value="Select"/> | [Redacted] | Annual Performance Evaluation | [Redacted] | [Redacted] | [Redacted] |
| <input type="button" value="Select"/> | [Redacted] | Annual Performance Evaluation | [Redacted] | [Redacted] | [Redacted] |
| <input type="button" value="Select"/> | [Redacted] | Annual Performance Evaluation | [Redacted] | [Redacted] | [Redacted] |
| <input type="button" value="Select"/> | [Redacted] | Annual Performance Evaluation | [Redacted] | [Redacted] | [Redacted] |
| <input type="button" value="Select"/> | [Redacted] | Annual Performance Evaluation | [Redacted] | [Redacted] | [Redacted] |

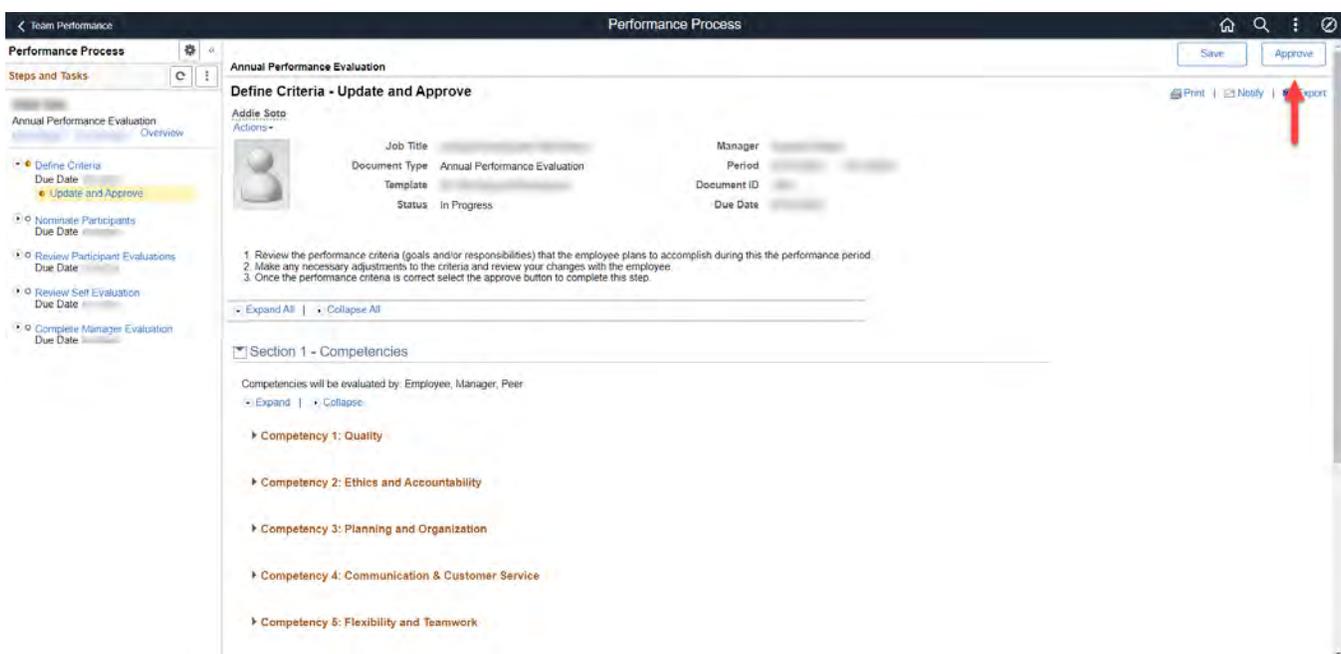
4. Select the check box next to all goals you wish to copy, then click the “Copy” button.



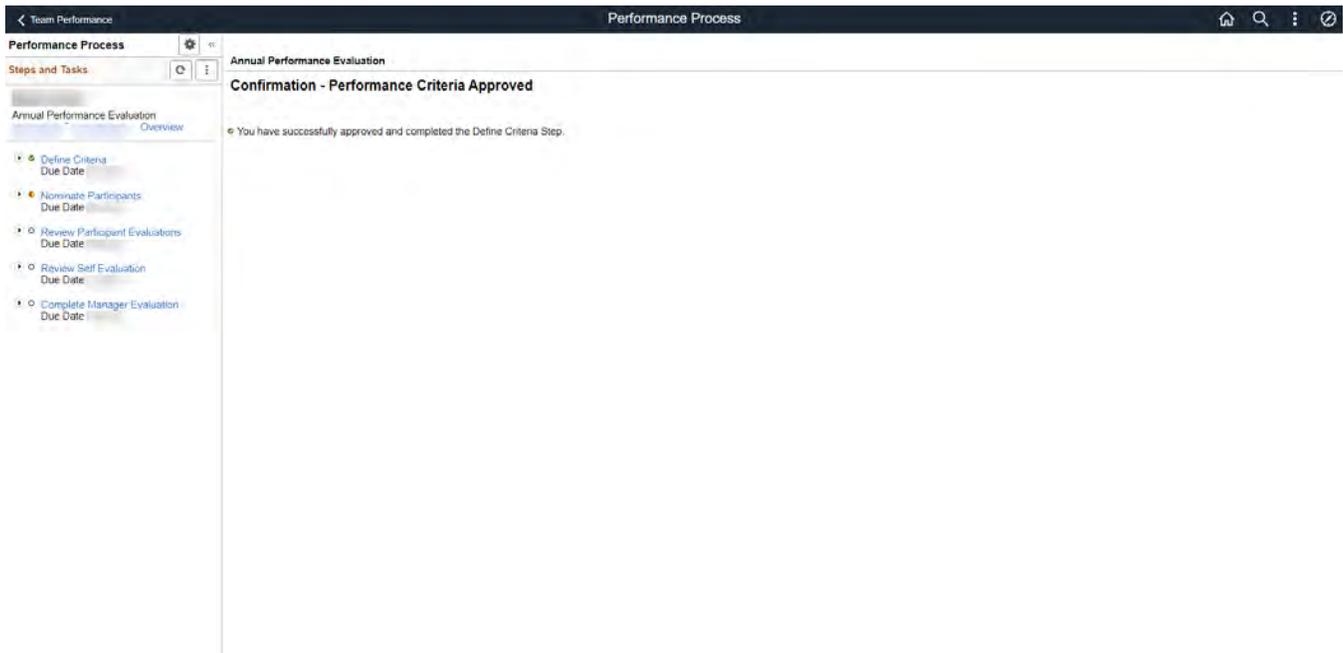
5. You will be returned to the evaluation and the goal will be added for you. Be sure to click the "Save" button to save the newly entered goal(s).

APPROVING CRITERIA

1. Once you are finished adding "Goals," click "Approve" and then "Confirm." Once you approve the criteria, the employee then is able to complete a Self Evaluation.



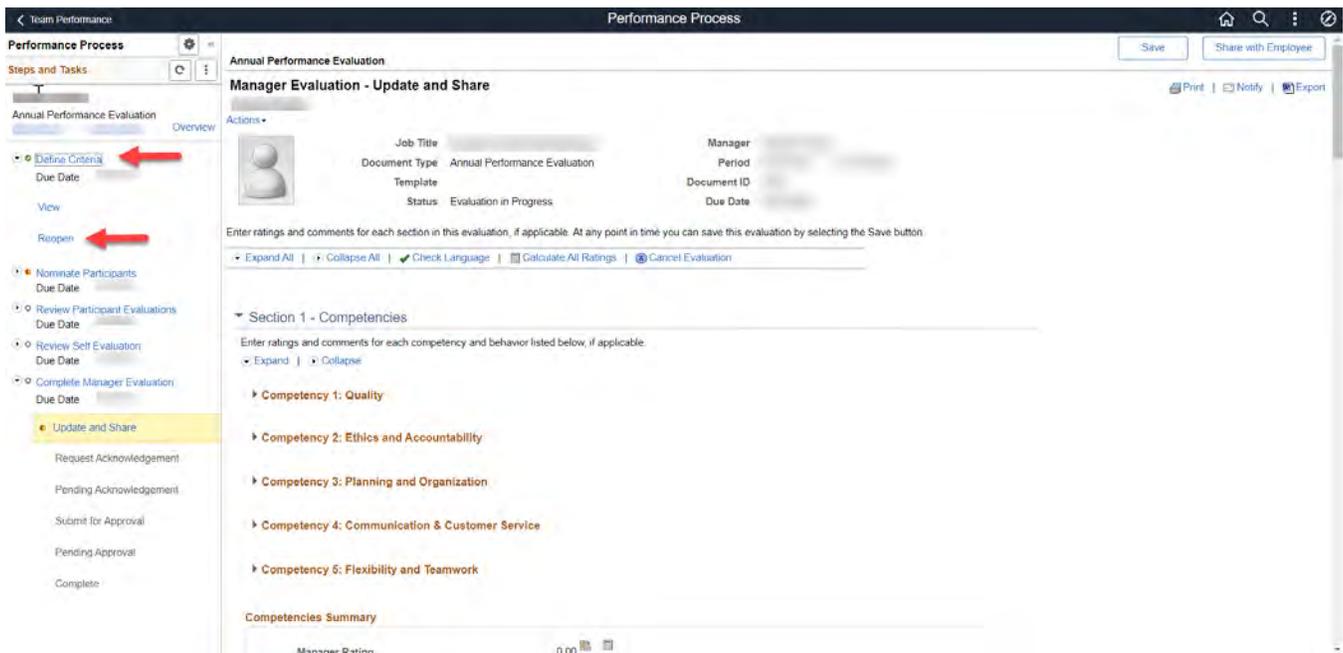
2. You will see a confirmation page once the criteria has been successfully approved.



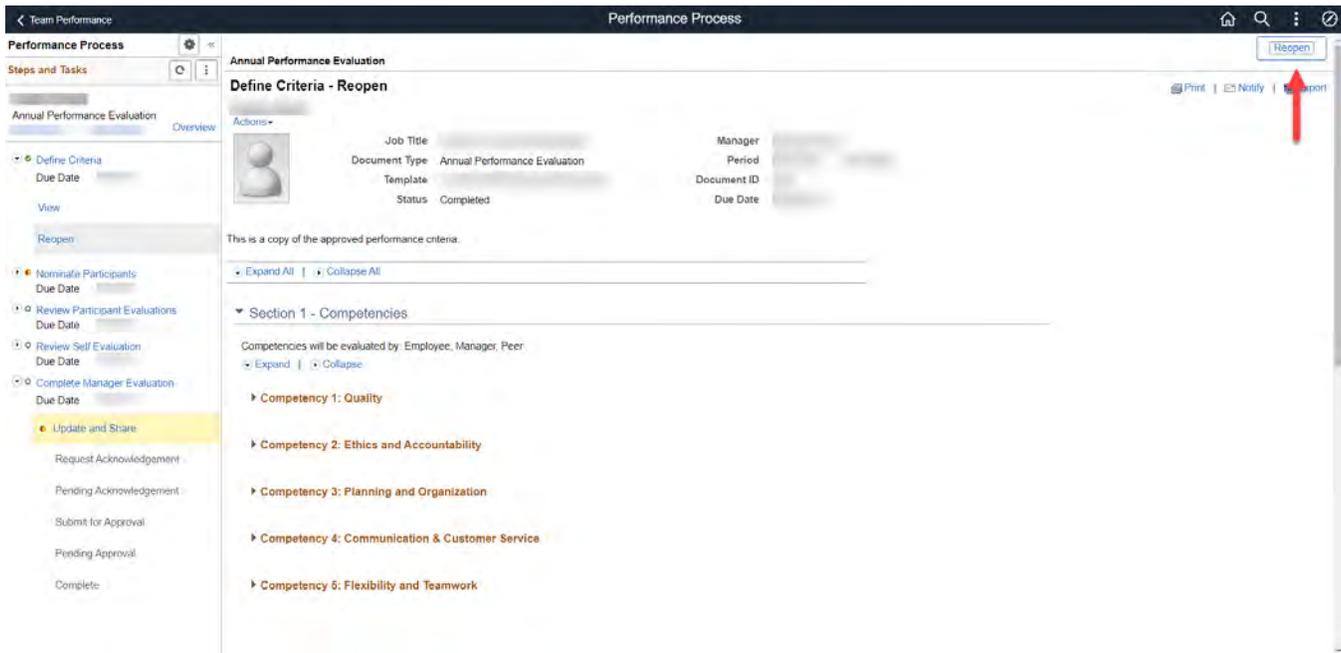
Editing Criteria

If you found you have made an error and wish to edit the approved criteria, you can reopen the evaluation.

1. Begin by selecting the evaluation from the Current Documents tab. Then select “Define Criteria” and “Reopen.”



2. Click the “Reopen” button and confirm your selection.



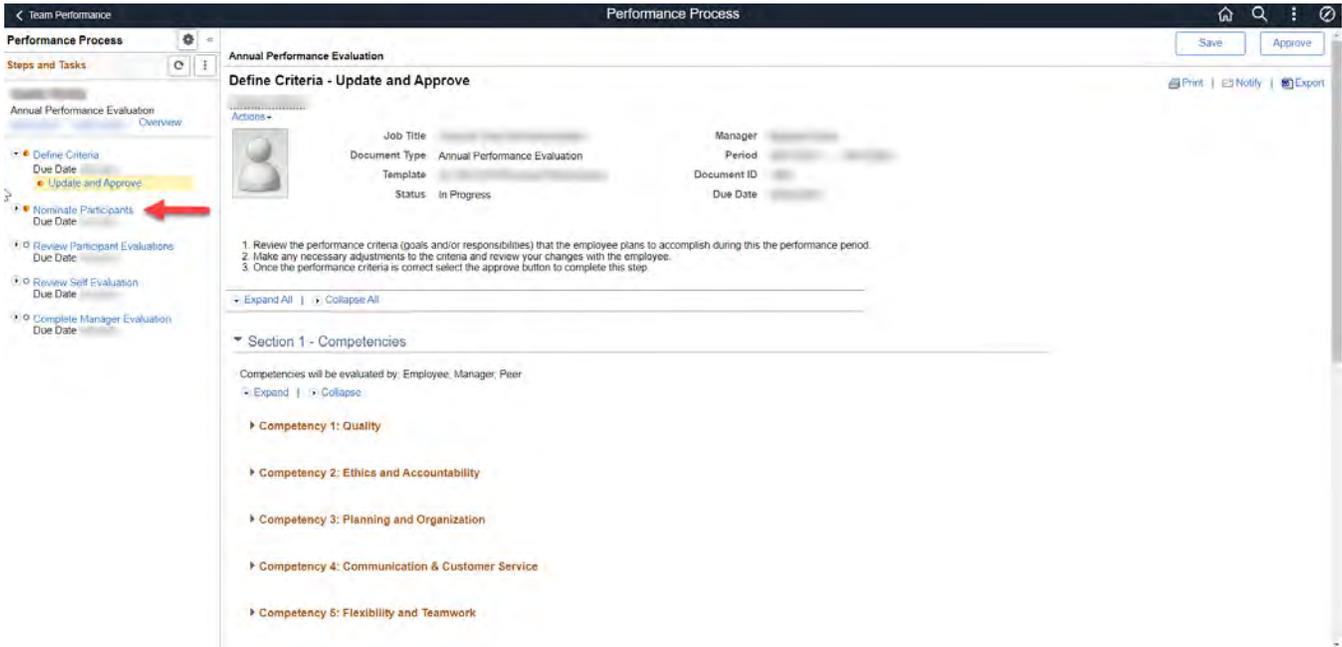
3. The criteria are then able to be edited and will need to be saved/approved again.

ADDITIONAL FEEDBACK FROM PARTICIPANTS

You may select participants to provide additional feedback for the employee you are evaluating. If an employee is a new transfer to your department, you may want to select a former supervisor as a Participant. If an employee regularly collaborates with a peer on projects, you may want to select that peer as a Participant for additional feedback. You may do this prior to or after approving the evaluation criteria.

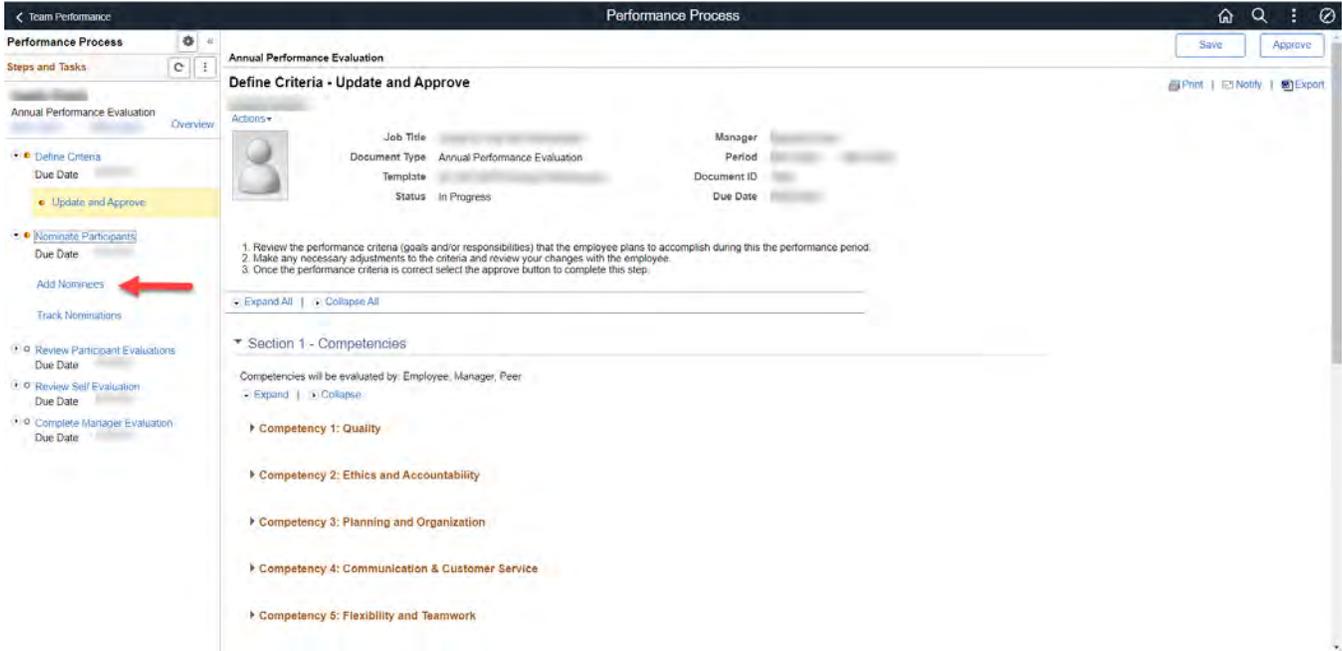
Submitting Participants

1. Open the evaluation for the employee you want to work on and click “Nominate Participants.”



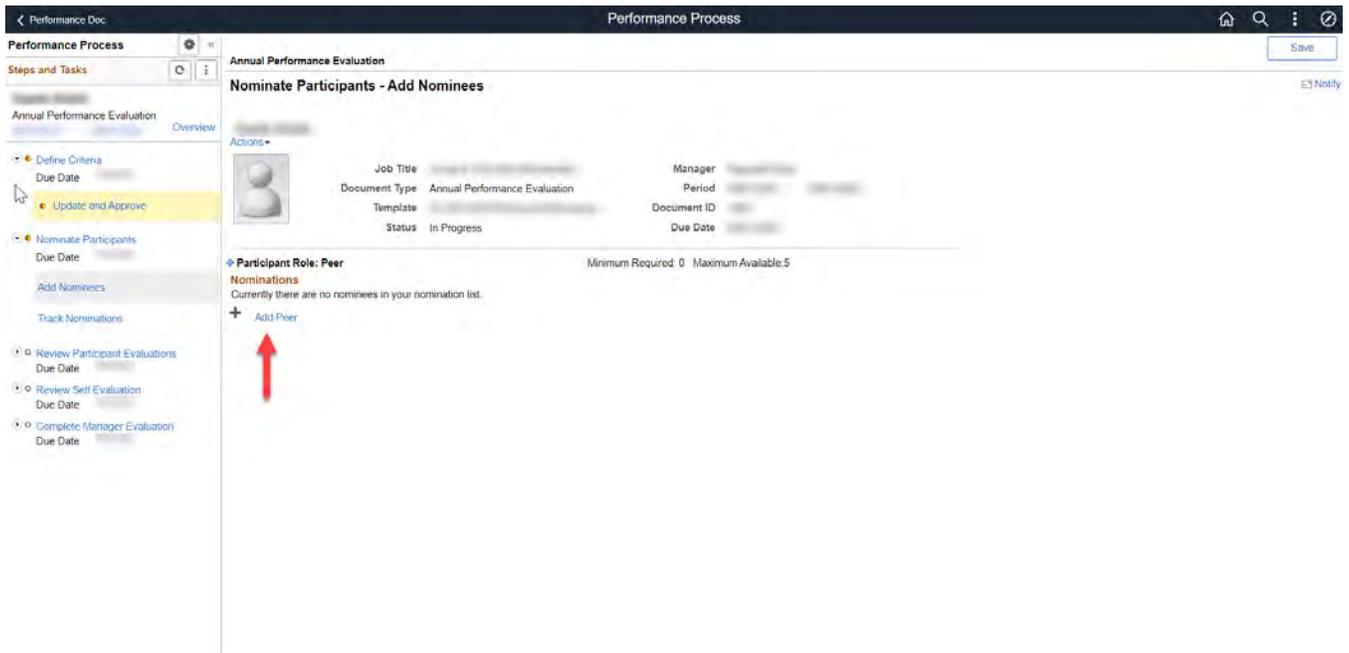
The screenshot shows the 'Performance Process' interface. The left-hand navigation menu is expanded to show the 'Annual Performance Evaluation' section. Under this section, the 'Define Criteria' sub-section is selected, and the 'Update and Approve' option is highlighted with a red arrow. The main content area displays the 'Define Criteria - Update and Approve' screen, which includes a header with 'Save' and 'Approve' buttons, a 'Print', 'Notify', and 'Export' menu, and a list of document details (Job Title, Document Type, Manager, Period, Document ID, Due Date, Status). Below this, there are instructions for reviewing and approving criteria, and a section titled 'Section 1 - Competencies' with a list of five competencies: Quality, Ethics and Accountability, Planning and Organization, Communication & Customer Service, and Flexibility and Teamwork.

2. A menu will open. Select “Add Nominees.”

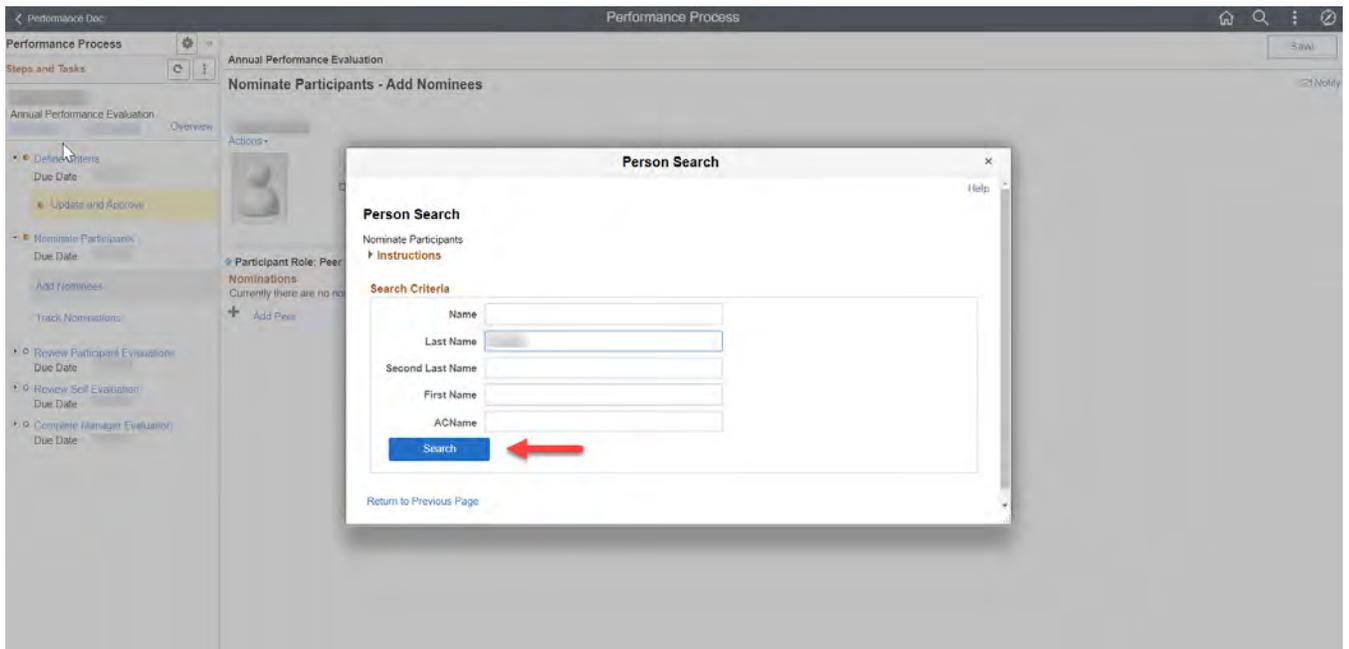


The screenshot shows the 'Performance Process' interface. The left-hand navigation menu is expanded to show the 'Annual Performance Evaluation' section. Under this section, the 'Nominate Participants' sub-section is selected, and the 'Add Nominees' option is highlighted with a red arrow. The main content area displays the 'Define Criteria - Update and Approve' screen, which includes a header with 'Save' and 'Approve' buttons, a 'Print', 'Notify', and 'Export' menu, and a list of document details (Job Title, Document Type, Manager, Period, Document ID, Due Date, Status). Below this, there are instructions for reviewing and approving criteria, and a section titled 'Section 1 - Competencies' with a list of five competencies: Quality, Ethics and Accountability, Planning and Organization, Communication & Customer Service, and Flexibility and Teamwork.

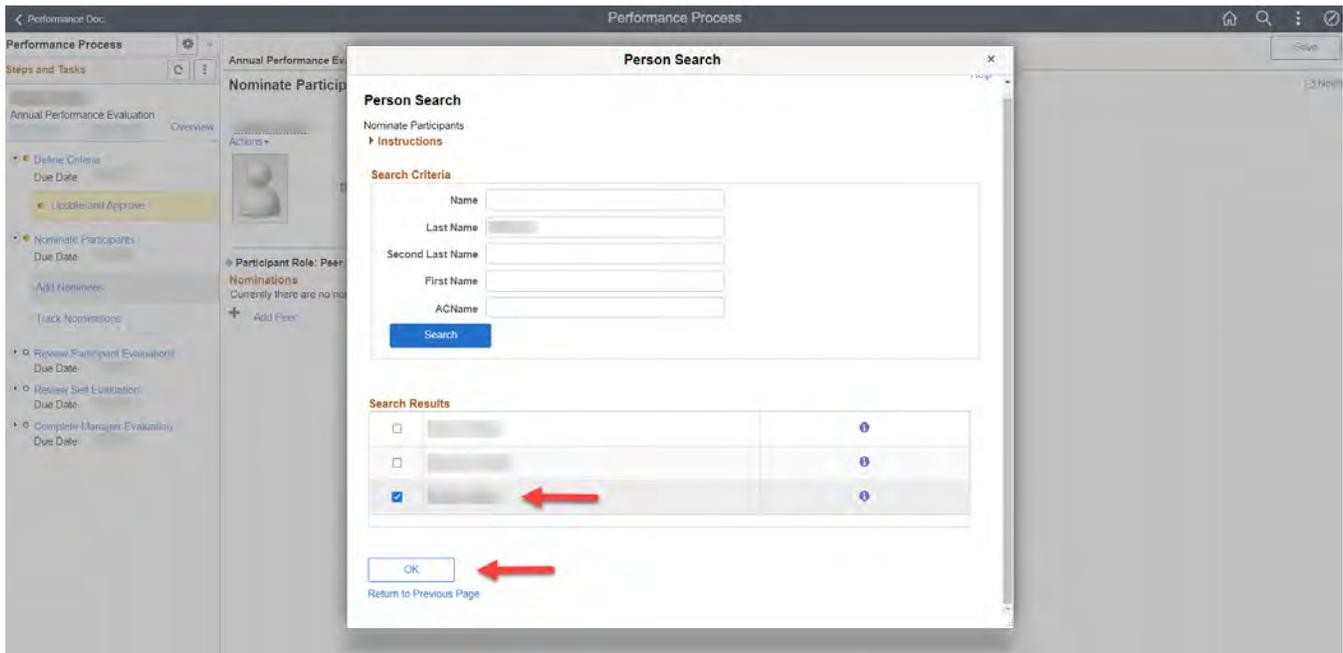
3. On the “Nominate Participants- Add Nominees” screen, click “Add Peer.”



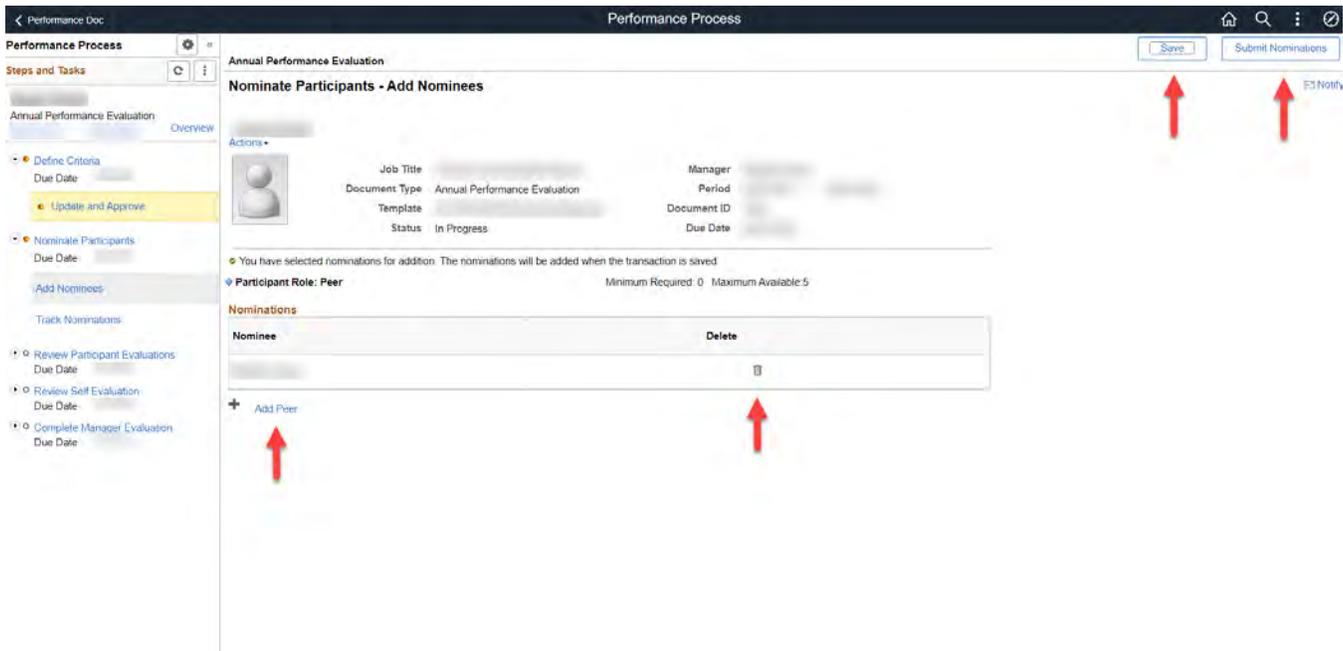
4. In the pop-up search window, enter any part of the participant's name and click "Search."



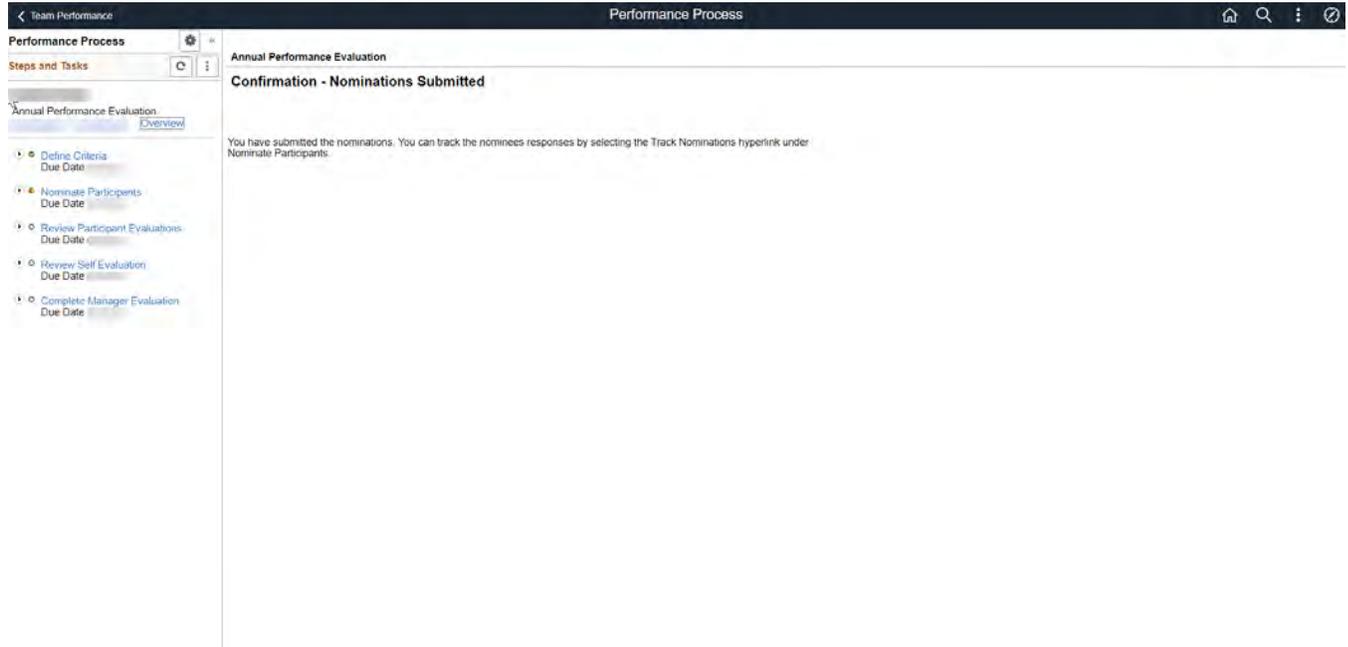
5. Select the name of the participant you would like to add and click "OK."



6. The nominee will appear. You can delete the individual if you made an error by clicking the trash can icon. You can add additional nominees by clicking the “Add Peer” and repeating the process above, up to a maximum of five (5) total nominees. Be sure to click the “Save” button to save your nominations. Once you are finished adding nominees, click the “Submit Nominations” button.

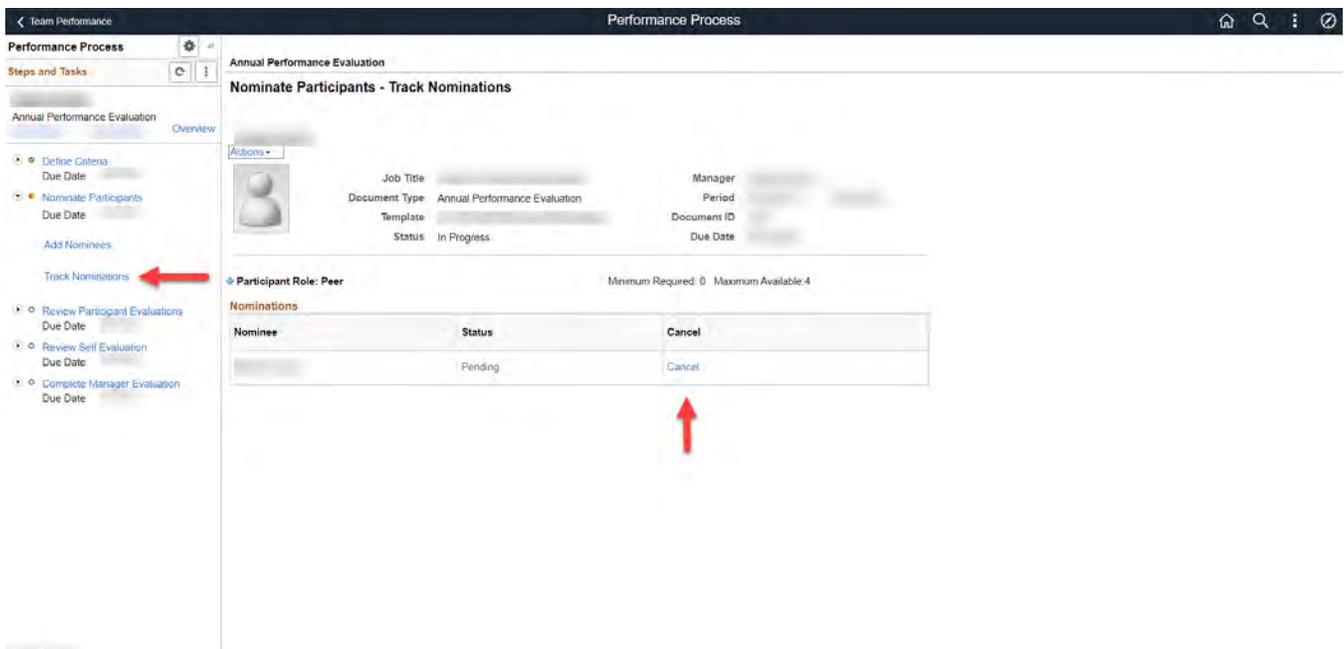


7. After confirming your submission, you will see a confirmation screen.



Tracking Participant Evaluations

1. Once a nominee has accepted the evaluation request, they will no longer appear under the “Add Nominees” tab, just the “Track Nominees” tab. To track the status of the additional feedback, click “Nominate Participants” to open the new menu, then select “Track Nominations.” From this screen, you can see the nominations, their status (Pending or Accepted), and cancel a nomination. You are also able to add more participants by repeating the “Add Nominees” process, even if you have already submitted a participant.

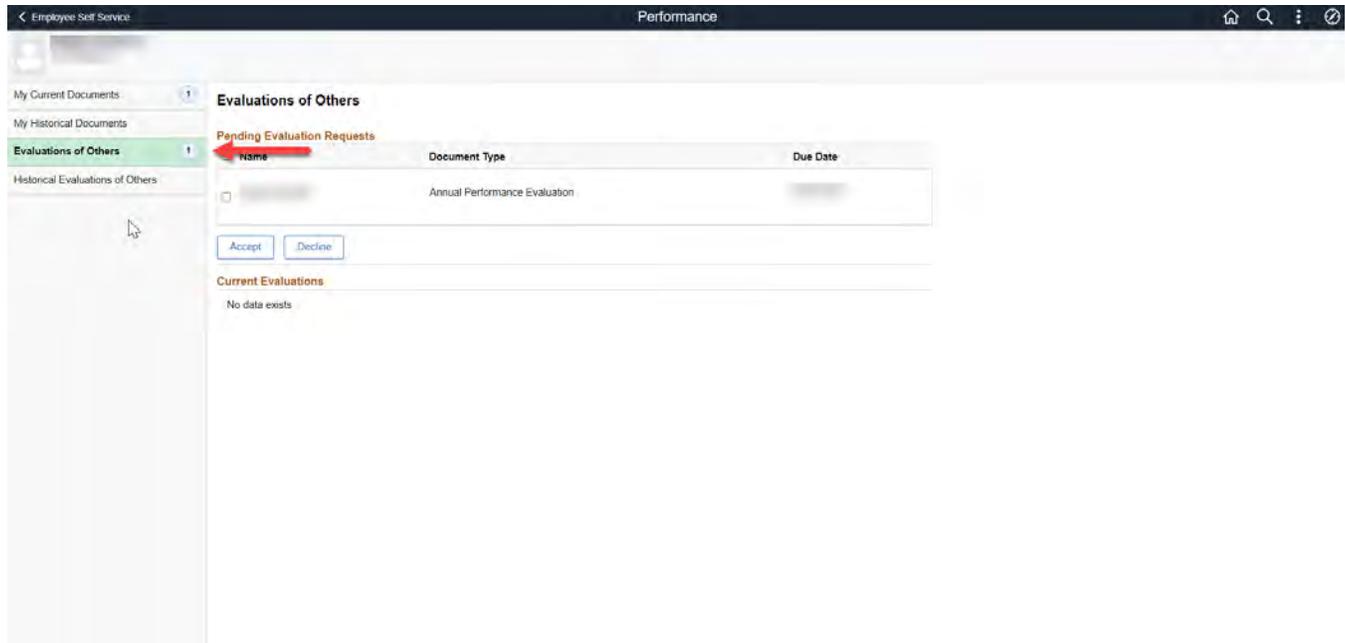


Completing an Evaluation as a Participant

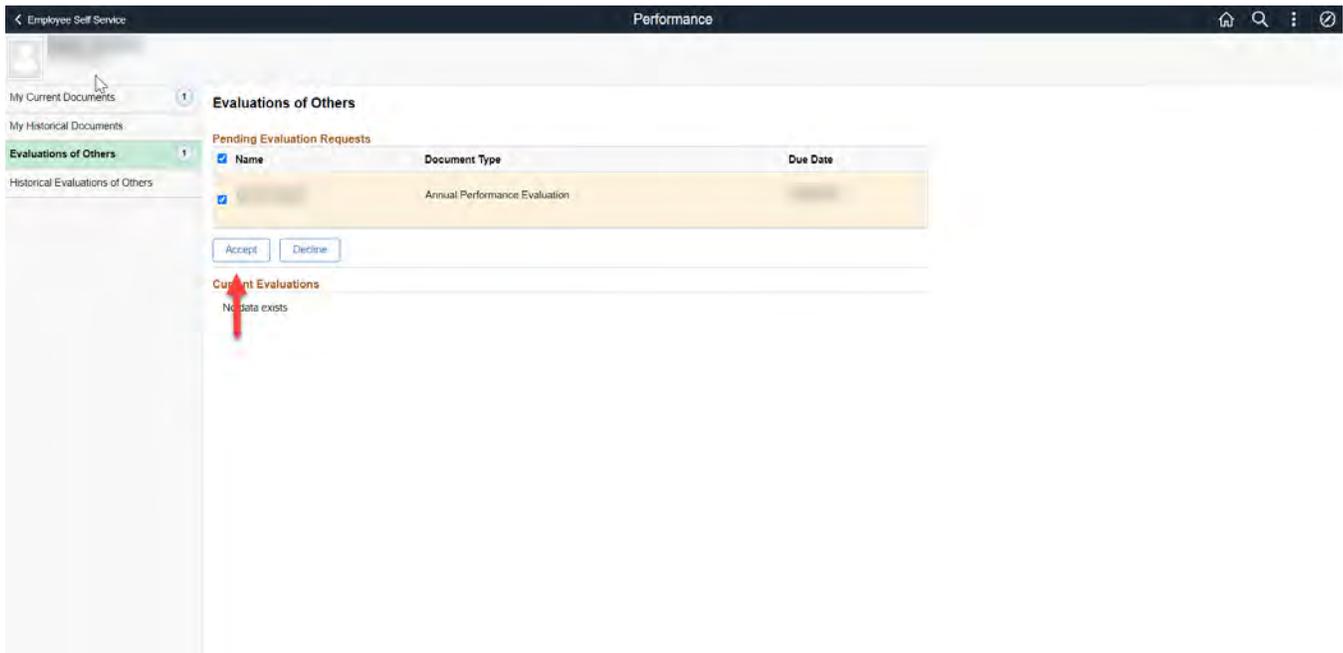
1. If someone submits you as a participant for feedback on an employee, you will see an “Evaluation Request” on the Performance button of MyOCPortal. Note: You must be under your “Employee Self Service” tab and not your “Manager Self Service” tab in MyOCPortal to do this.



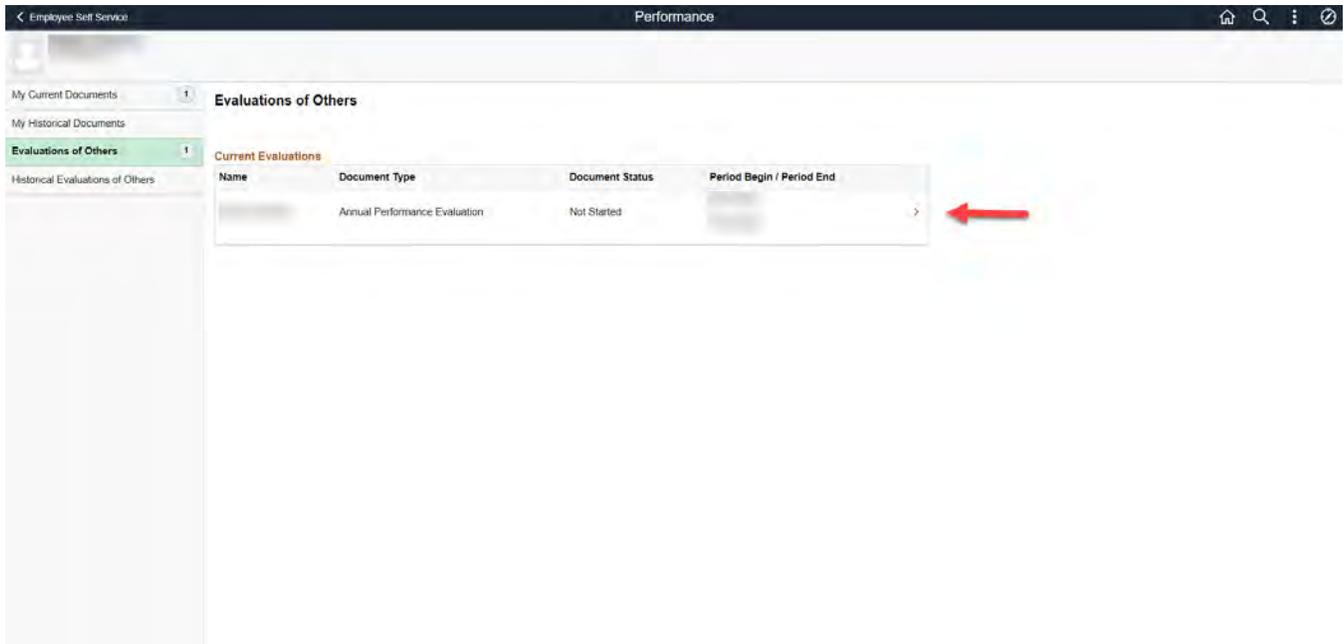
2. Clicking on the Performance tab will bring you to the home screen for evaluations. Click on the menu button “Evaluation of Others” to display all Participant Evaluation Requests. The name of the individual you are requested to evaluate is displayed, along with the due date.



3. Click the evaluation to check the selection box and then click “Accept.”

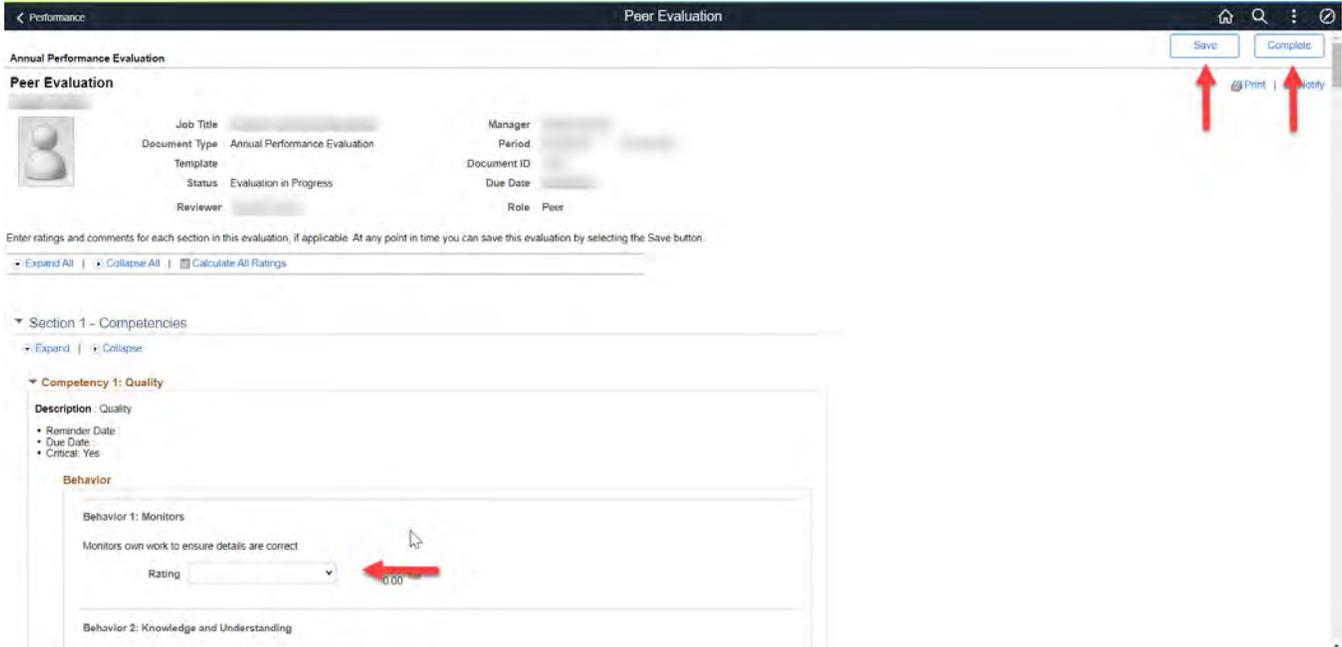


4. You will see a short confirmation message and then be taken back to the “Evaluations of Others” home screen. Click on the evaluation to complete it.



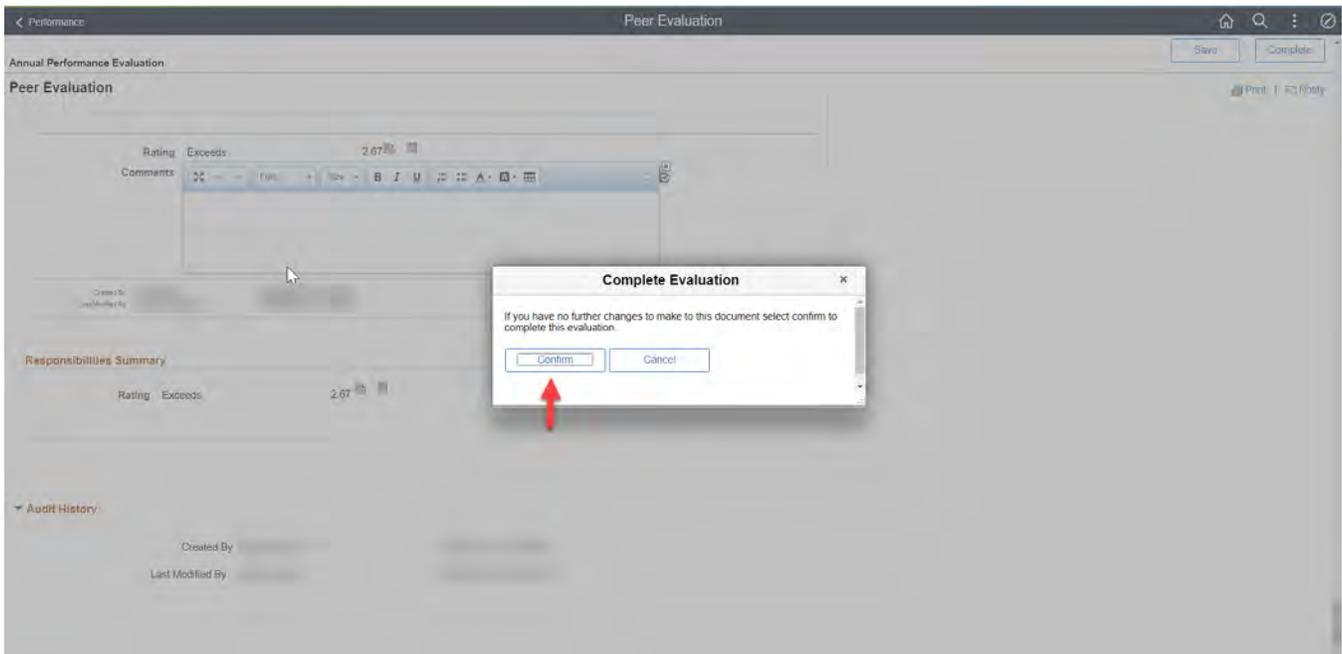
5. Once the evaluation is open, you can use the drop-down menus to rate the employee in each of the behaviors in each of the competencies. You can also add notes for each of the competencies. Scrolling down, all goals submitted by the evaluator are displayed, with rating and note options. If the employee is receiving a supervisor evaluation, responsibilities and sub-responsibilities will also be available to rate and notate. Be

sure to save your work intermittently by clicking the “Save” button. When you are finished, click the “Submit” button.



The screenshot shows the 'Peer Evaluation' form in a web browser. At the top right, there are 'Save' and 'Complete' buttons, both highlighted with red arrows. Below the header, there is a 'Peer Evaluation' section with a profile picture and various fields for Job Title, Document Type, Manager, Period, Document ID, Status, Due Date, Reviewer, and Role. A note states: 'Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.' Below this, there are options to 'Expand All', 'Collapse All', and 'Calculate All Ratings'. The main content area is titled 'Section 1 - Competencies' and includes a 'Competency 1: Quality' section with a 'Description: Quality' and a list of criteria: 'Reminder Date', 'Due Date', and 'Critical: Yes'. Underneath, there are two 'Behavior' sections: 'Behavior 1: Monitors' with a description 'Monitors own work to ensure details are correct' and a 'Rating' dropdown menu set to '0.00', and 'Behavior 2: Knowledge and Understanding'. A red arrow points to the '0.00' rating.

6. Clicking the “Complete” button will take you to a confirmation screen. Click “Confirm” to submit or “Cancel” to return to the evaluation.

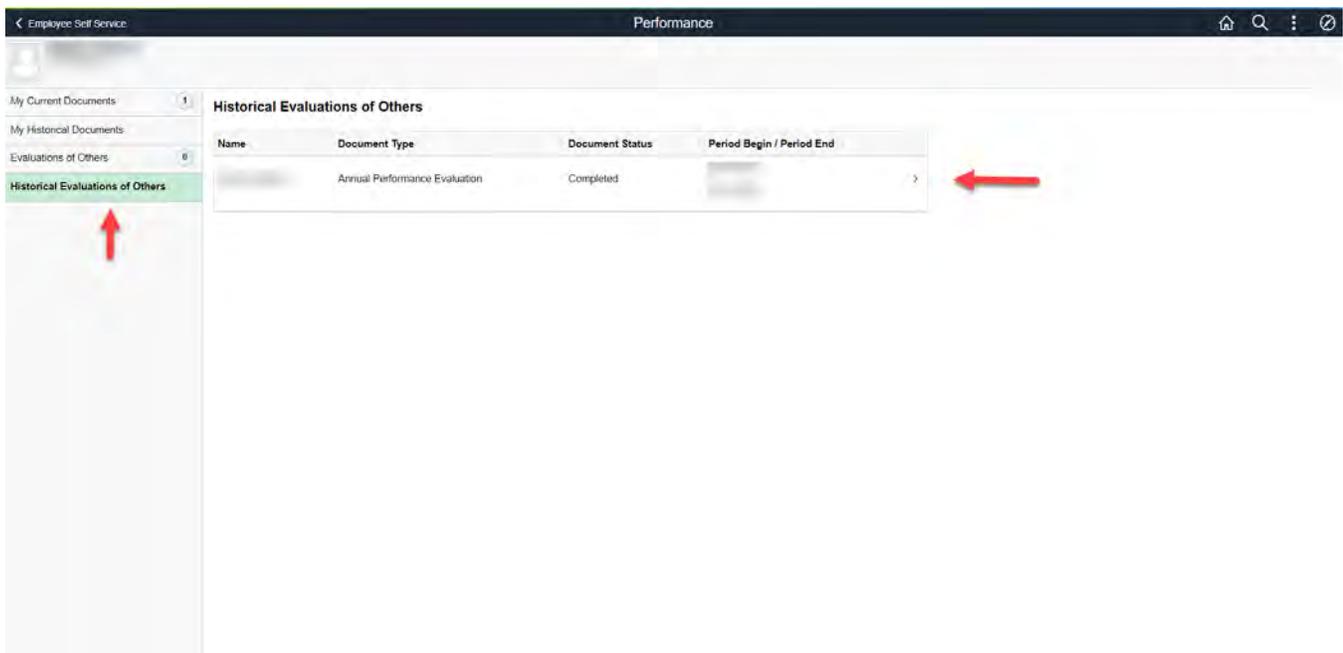


The screenshot shows the 'Peer Evaluation' form with a 'Complete Evaluation' dialog box open in the center. The dialog box contains the text: 'If you have no further changes to make to this document select confirm to complete this evaluation.' Below the text are two buttons: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button. The background of the form is dimmed, showing a 'Rating Exceeds 2.67' and a 'Comments' section with a rich text editor. At the bottom, there is a 'Responsibilities Summary' section with 'Rating Exceeds 2.67' and an 'Audit History' section with 'Created By' and 'Last Modified By' fields.

7. You will then be taken to a confirmation screen. You can return to the home screen by clicking the “Performance” button.

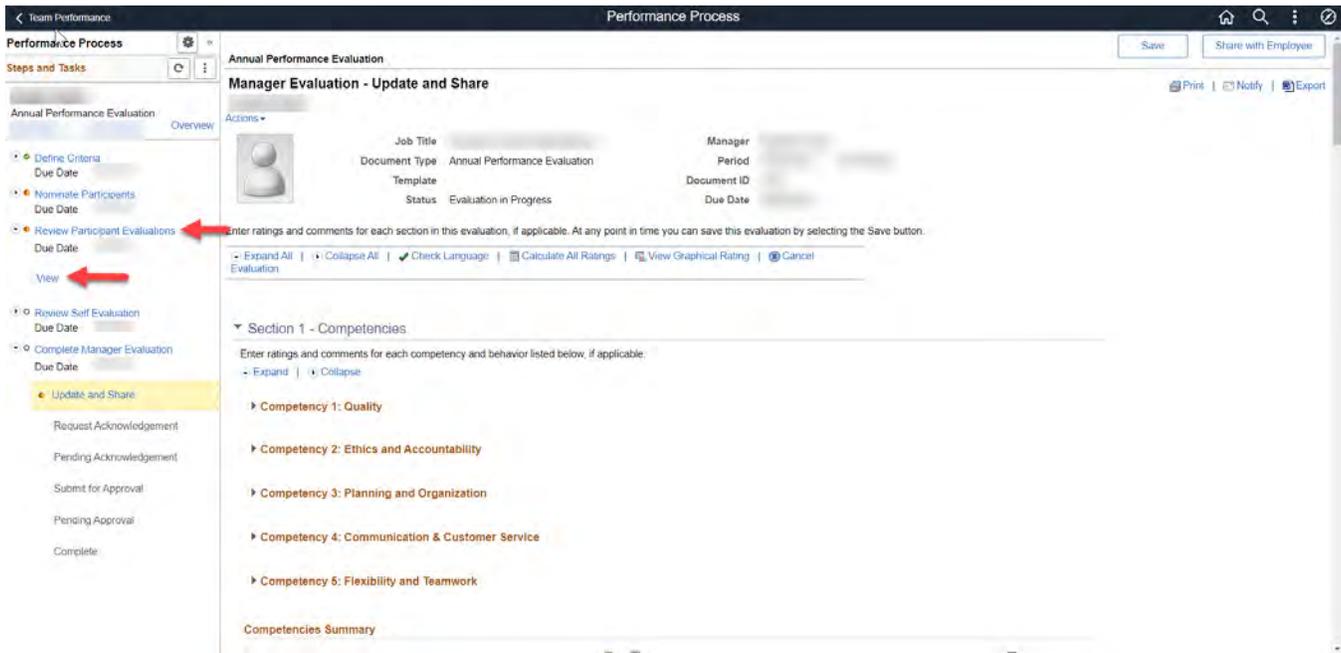


- To view completed evaluations of others, click on the “Historical Evaluations of Others” tab on the home screen, then select the evaluation you wish to view.

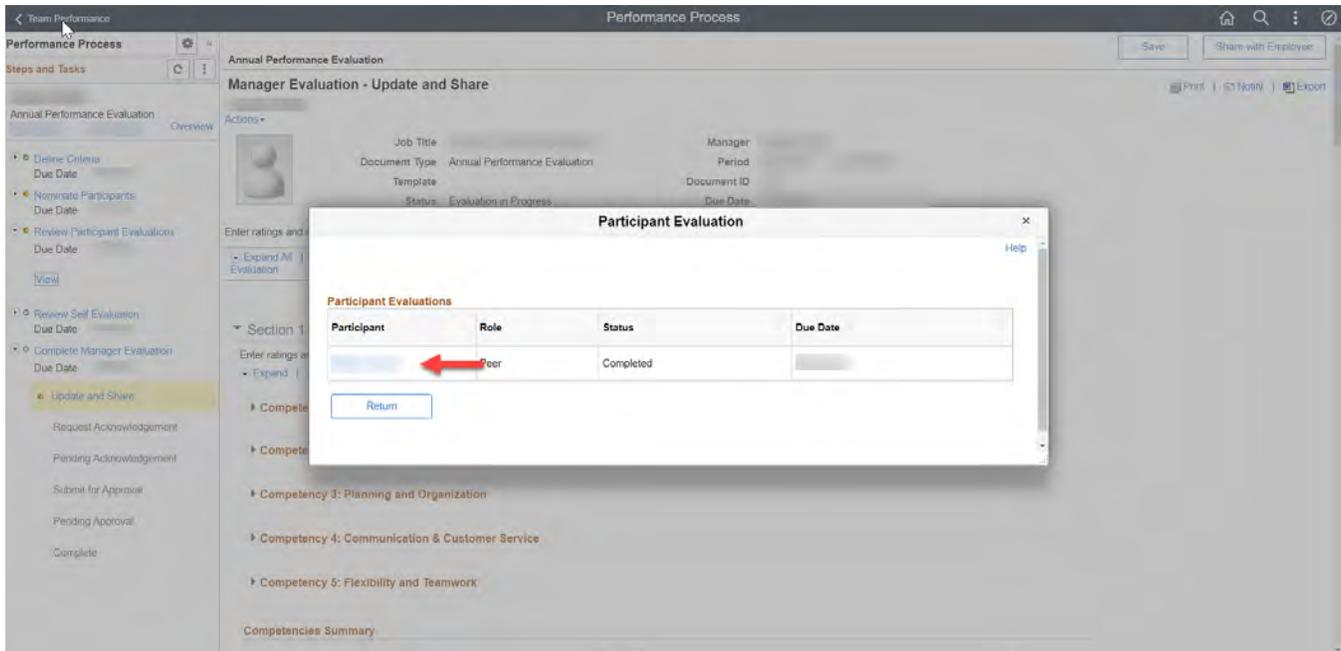


Viewing a Completed Participant’s Evaluation

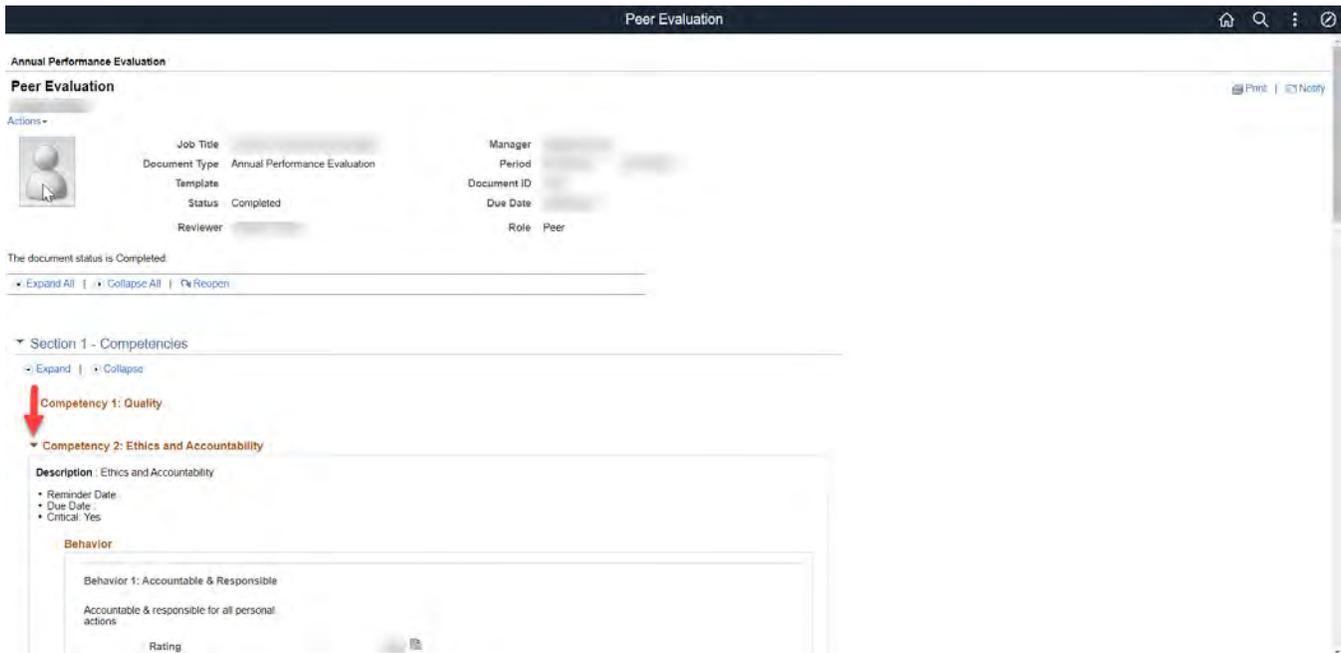
- Click on the evaluation you wish to work with (Current Documents>Evaluation Selected). If a participant has accepted the evaluation (See: [Tracking Participant Evaluations](#)) and completed it, you will be able to view it. Select “Review Participant Evaluations” and then “View.”



2. A pop-up menu will appear and you can select the feedback you wish to view by clicking on the blue hyperlink name of the Participant.

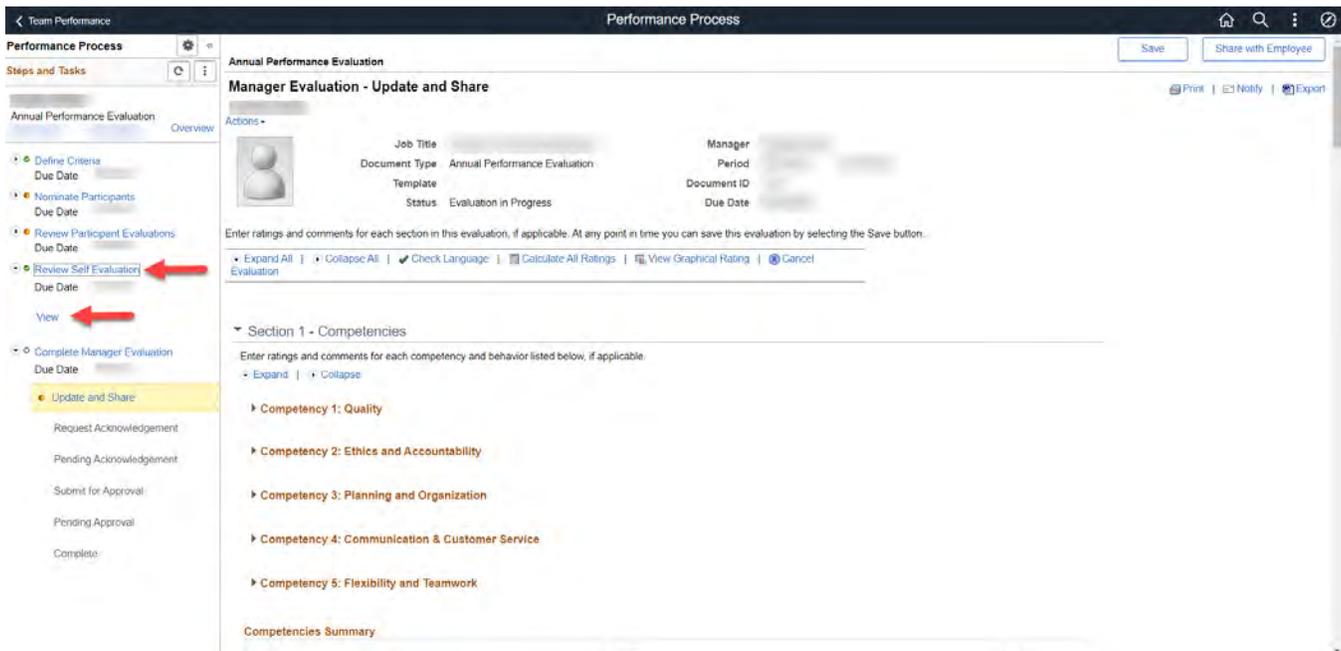


3. A new window will appear with the submitted feedback. Expanding sections by clicking arrows will display more detailed information.

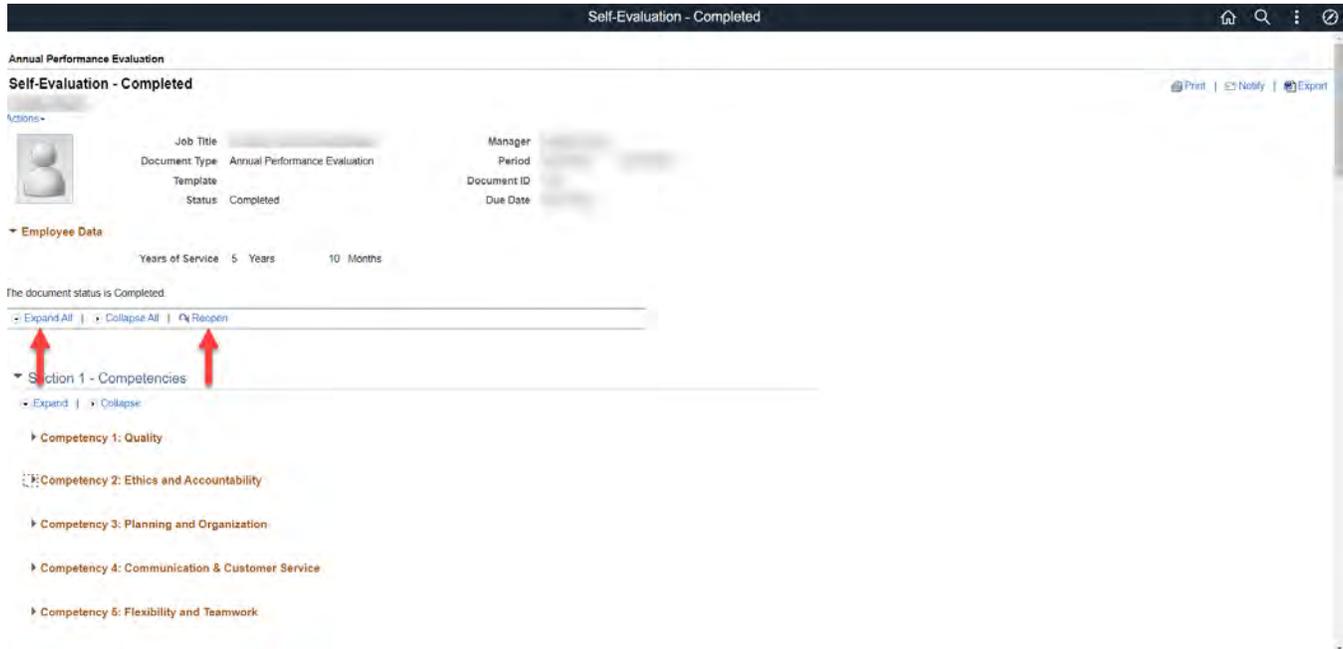


REVIEWING EMPLOYEE SELF EVALUATION

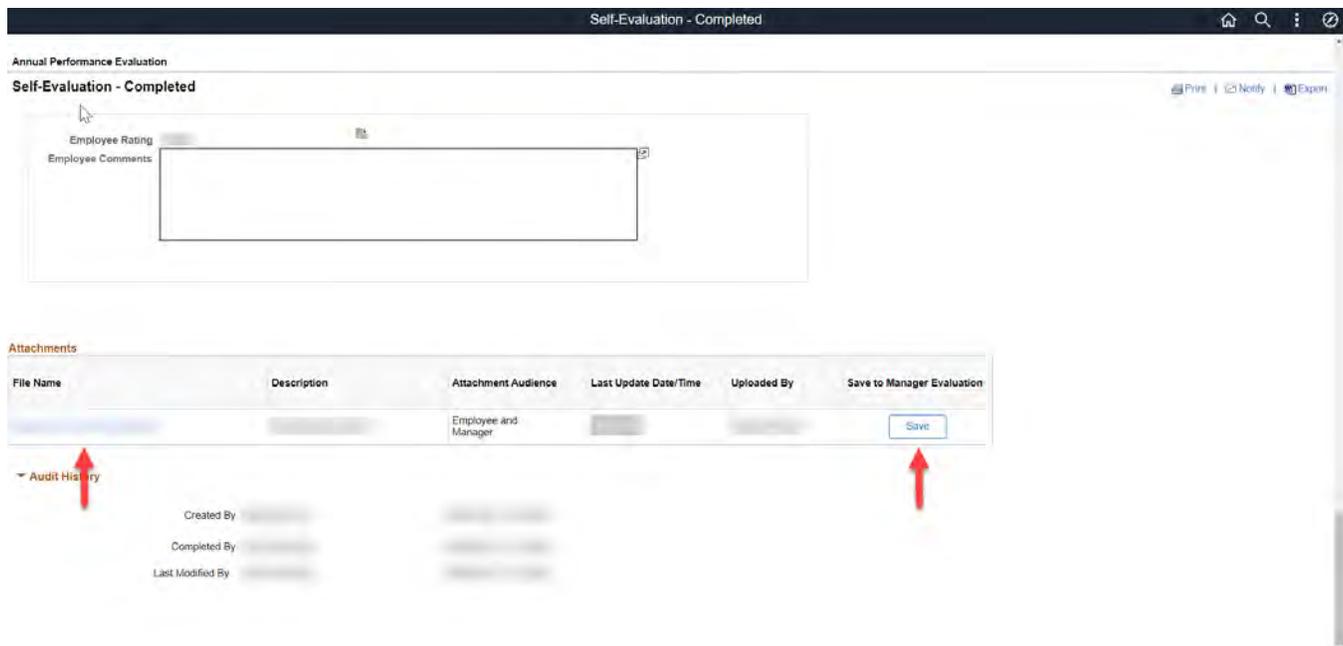
1. When an employee has completed their self-evaluation, you will see a green check next to “Review Self Evaluation.” Clicking on the linked text “Review Self Evaluation” will display an additional menu. Click “View” to view the employee’s self-evaluation in a new window.



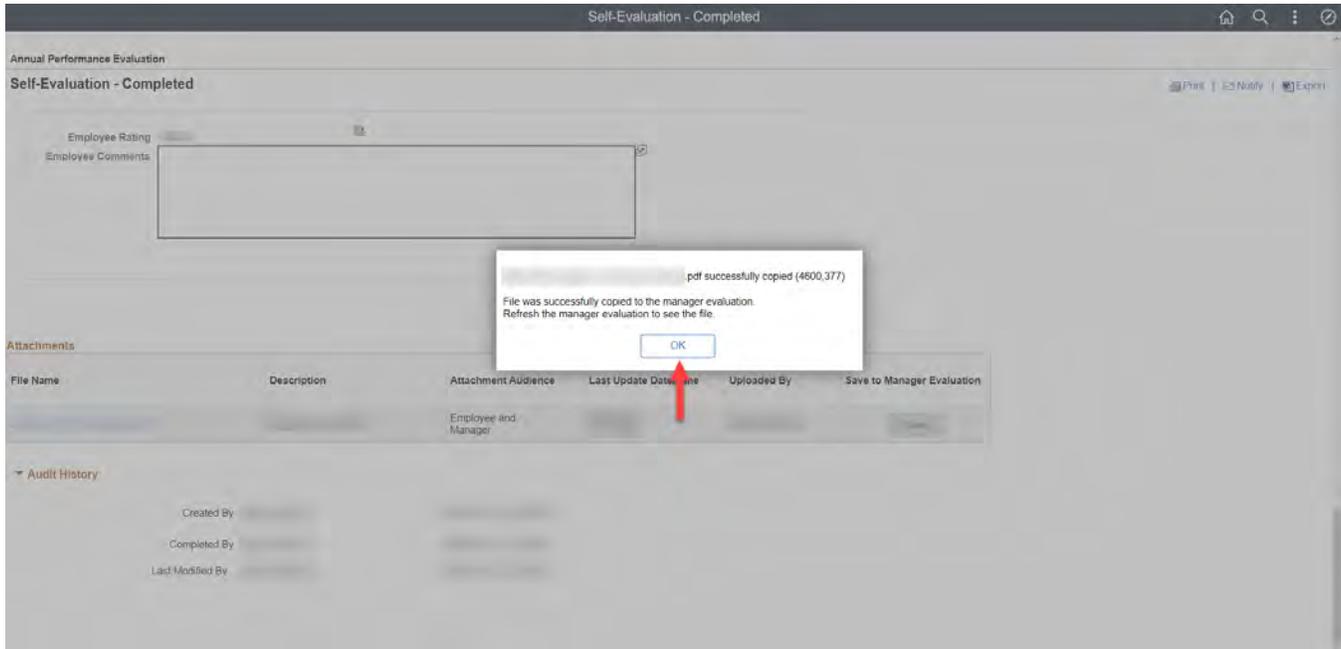
- When viewing the employee’s self-evaluation, be sure to click the “Expand All” text to view all of the employee’s ratings and comments. You can also click “Reopen” to allow the employee to make changes to their self-evaluation. This process is similar to editing criteria (See: [Approving Criteria>Editing Criteria](#)).



- If your employee has elected to upload supporting documentation, you will see all attachments at the very bottom of the page, under the heading “Attachments.” Clicking the file name will display the attachment. If you would like to attach this document to your manager evaluation, you can do so by clicking the “Save” button under “Save to Manager Evaluation.”



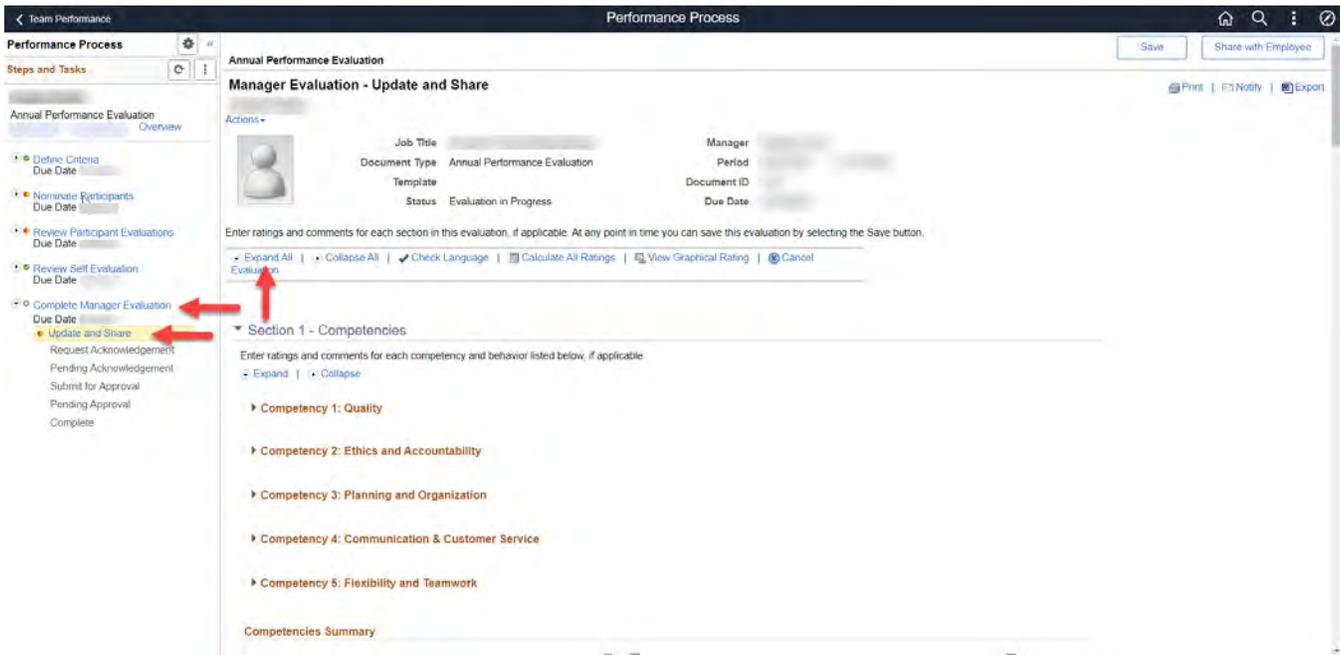
4. A confirmation window will display. Click “OK” to return to the employee evaluation. Refresh the manager evaluation in your original open internet window to display the file as attached to the Manager Evaluation.
Note: Attachments added from the employee Self Evaluation to the Manager Evaluation cannot be deleted.



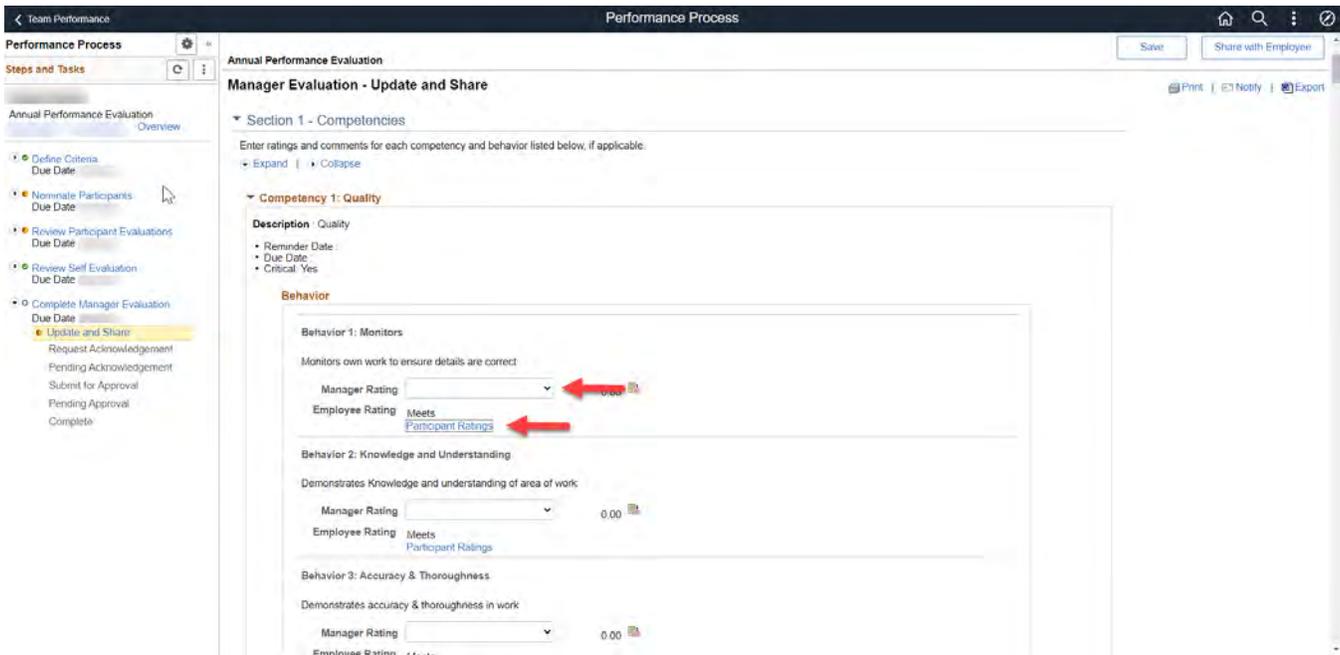
COMPLETING THE MANAGER EVALUATION

Update and Share

1. Once you have opened the evaluation you wish to work with, click on “Complete Manager Evaluation,” then “Update and Share,” then “Expand All.”



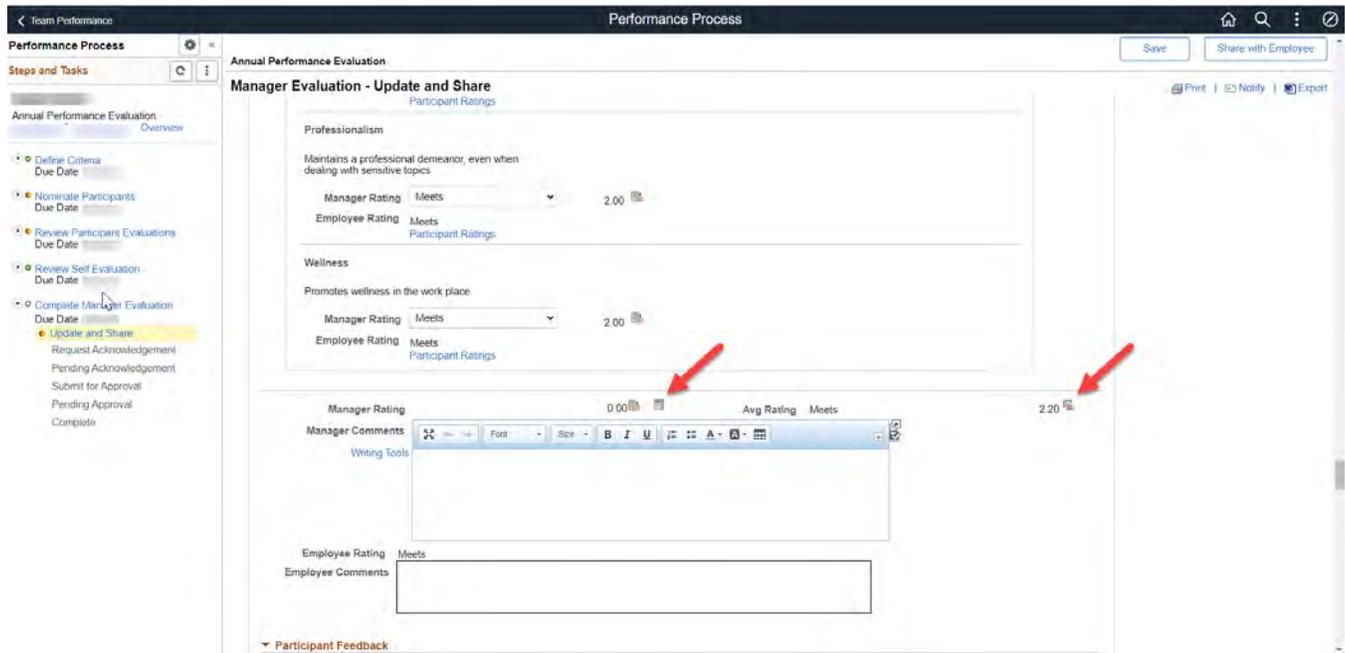
2. The employee’s self-rating will be displayed for you in each of the competencies, goals, and responsibilities (if applicable). If you selected a nominee, their rating for each behavior can be viewed by clicking the “Participant Ratings” text. You will use the drop-down menu next to “Manager Rating” to rate each of the employee’s behaviors.



| Rating | Numeric Rating | Description |
|--------|----------------|-------------|
|--------|----------------|-------------|

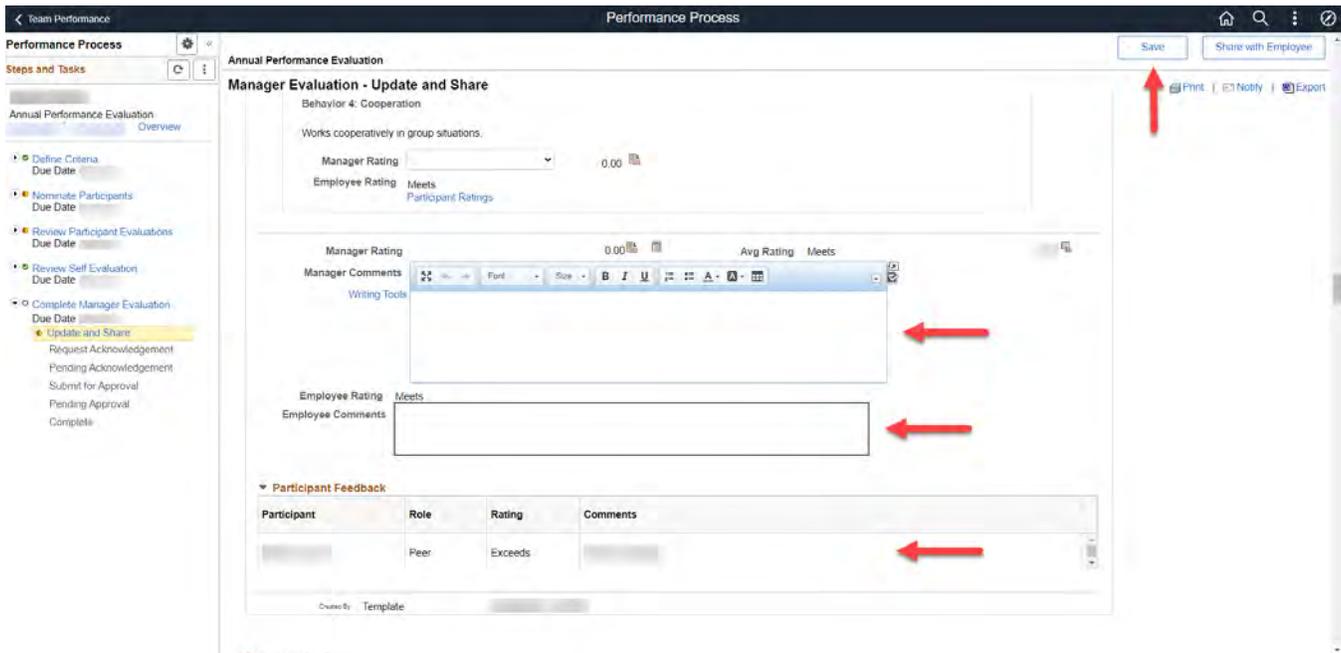
| | | |
|-------------------|---|---|
| Exceeds | 3 | Performance consistently exceeds job requirements, demonstrates exceptional productivity, efficiency, and effectiveness. (Written comment is required.) |
| Meets | 2 | Performance consistently meets job requirements, demonstrates productivity, effectiveness, and competency |
| Needs Improvement | 1 | Performance does not consistently meet all job requirements; improvement is necessary to attain the expected level of performance. (Written comment is required.) |

3. Once you have selected ratings in each of the Behaviors, Goals, and Sub-Responsibilities (if applicable), you will need to calculate the average. This will need to be done for each of the five competencies and three responsibilities (if applicable) as well as the summaries for Behaviors, Goals, and Responsibilities. The system will auto-populate an average of your ratings if you click the calculator icon next to “Manager Rating.” You can view the employee’s self-rating as well as any nominees’ ratings by clicking the graph icon next to “Avg Rating.” Note: Changing any of the drop-down ratings after you click the calculator will not automatically change the average rating. You will need to re-calculate by clicking the calculator icon again.

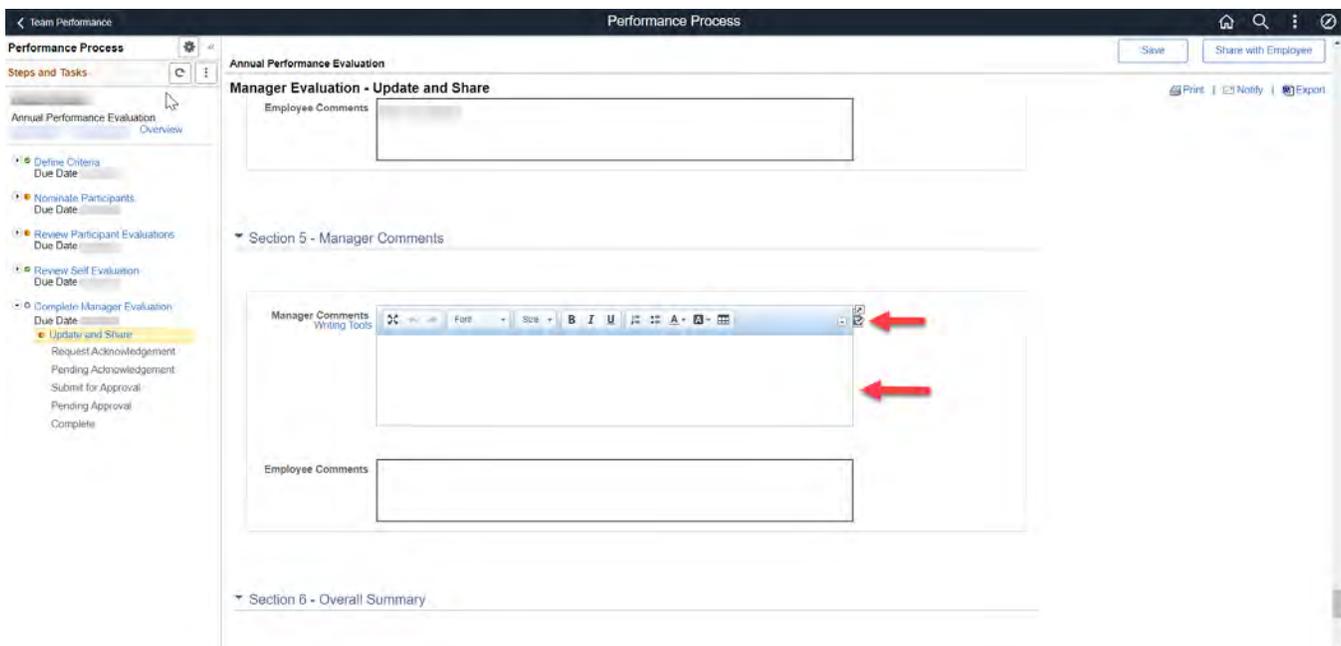


The screenshot displays the 'Performance Process' interface for 'Annual Performance Evaluation'. The main section is titled 'Manager Evaluation - Update and Share'. It features two rating categories: 'Professionalism' and 'Wellness'. Each category has a 'Manager Rating' dropdown set to 'Meets' and a corresponding 'Employee Rating' dropdown also set to 'Meets'. Below these, there is a 'Manager Rating' field showing '0.00' and an 'Avg Rating' field showing 'Meets'. A red arrow points to a calculator icon next to the 'Manager Rating' field, and another red arrow points to the 'Avg Rating' field. The interface also includes a 'Manager Comments' text area with a rich text editor toolbar and an 'Employee Rating' dropdown set to 'Meets' with an 'Employee Comments' text area below it. A 'Participant Feedback' section is visible at the bottom.

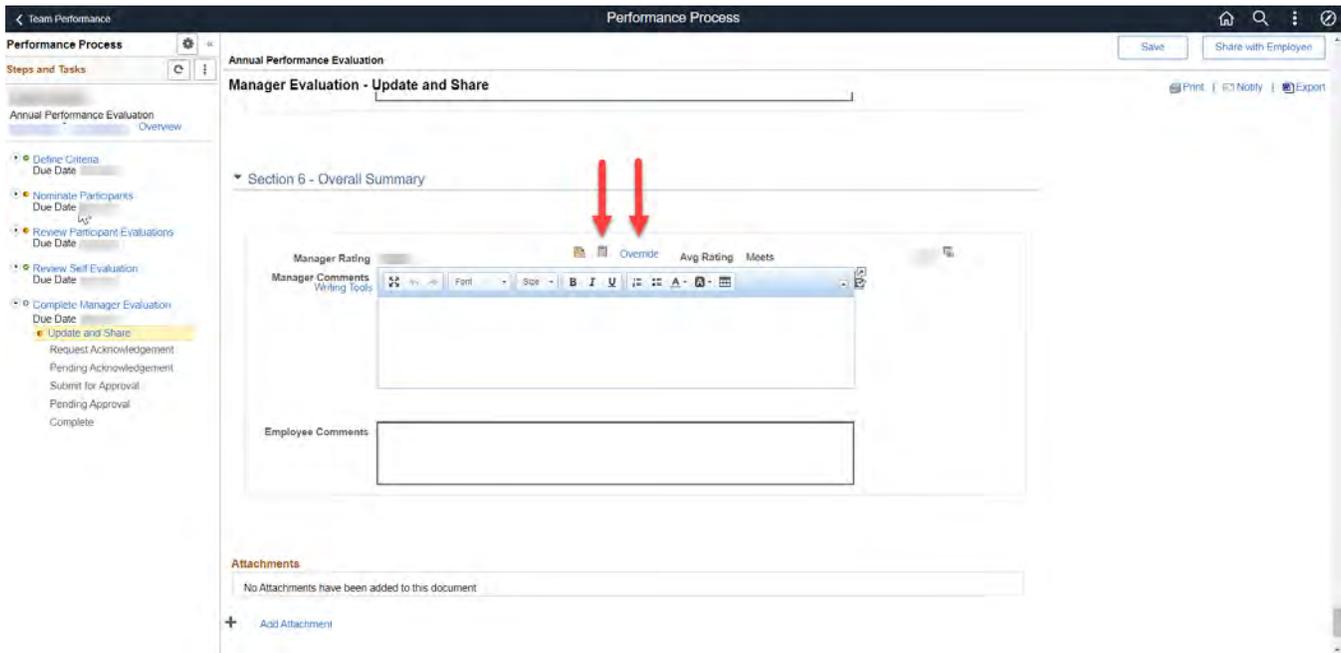
4. At the end of each competency, goal, and sub-responsibility (if applicable), you can view employee comments, add manager comments, and view the nominee’s comments (if applicable). Be sure to click the “Save” button often to save your work.



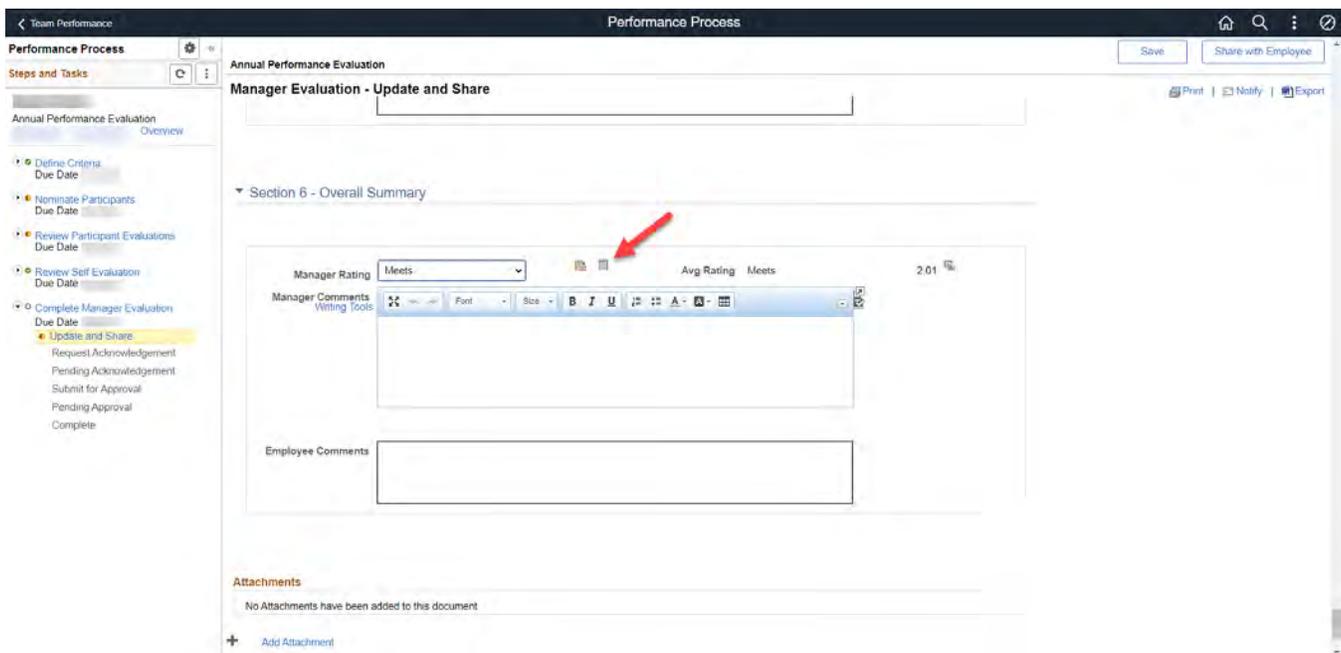
5. Near the bottom of the page, in Sections 5-Manager Comments and Section 6-Overall Summary, you can enter additional comments. There is also a spell check feature you can utilize by clicking the check icon on the upper, right-hand outside of the text box.



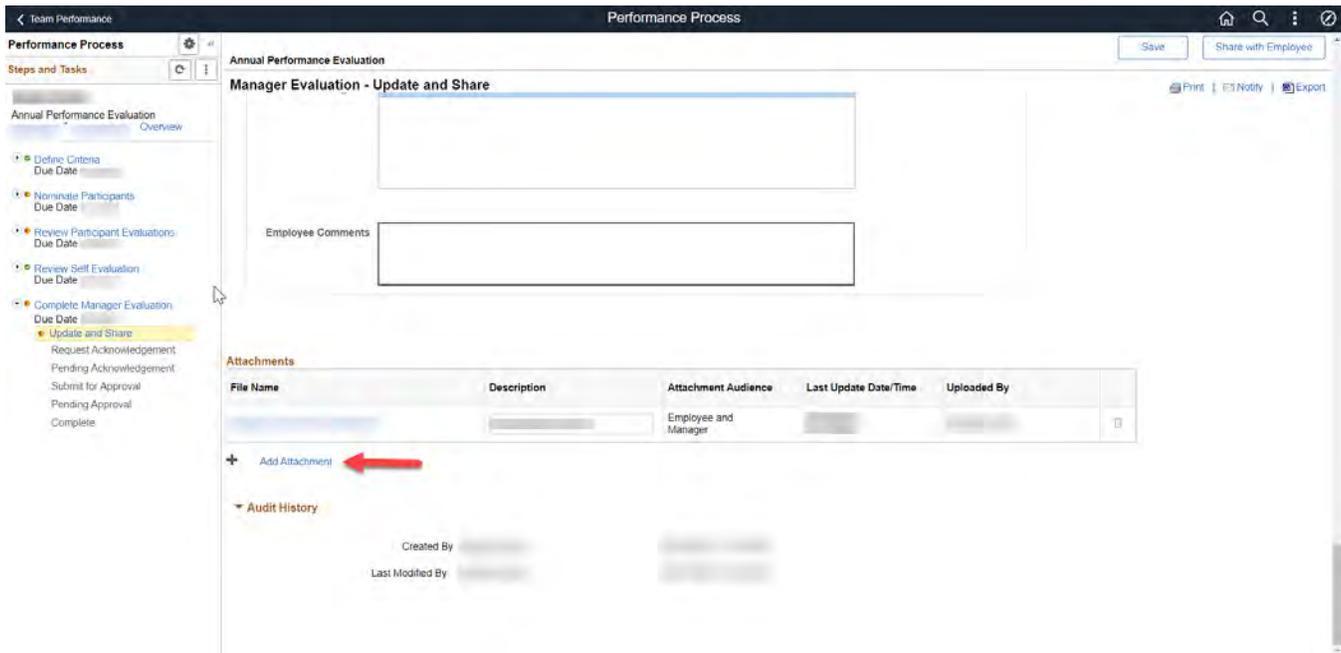
6. In Section 6-Overall Summary, you will need to click on the calculator icon to calculate the employee's summary rating. Using the "Override" feature allows you to edit the rating by converting it to an editable drop-down box. Be sure to click the "Save" button to save your work.



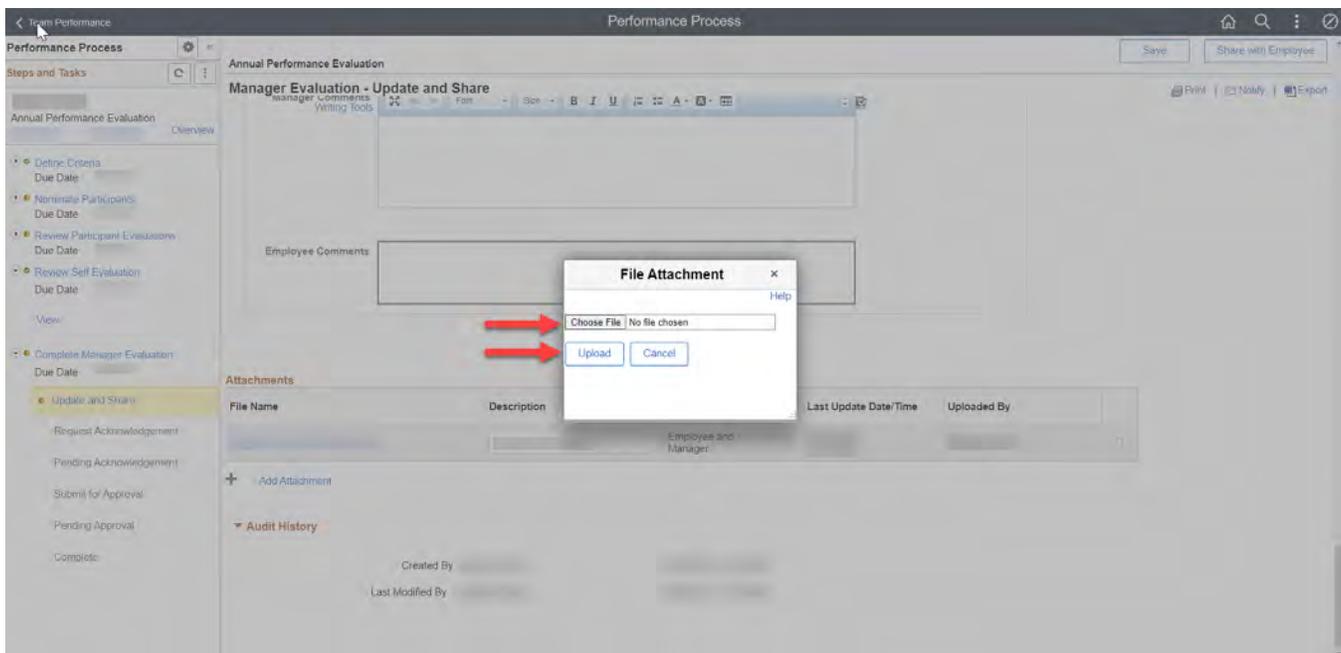
7. If you choose to override the employee’s rating, the “Override” button will disappear. If you wish to have the system recalculate the original, average rating, click the calculator icon. Doing so will bring back the “Override” button and you will be able to override the employee’s evaluation rating again if you choose to do so.



8. You may add attachments to the evaluation to support the rating. Any employee attachments you added from the employee’s Self Evaluation are also displayed at the bottom of the page. If you would like to add an attachment, click “Add Attachment.”

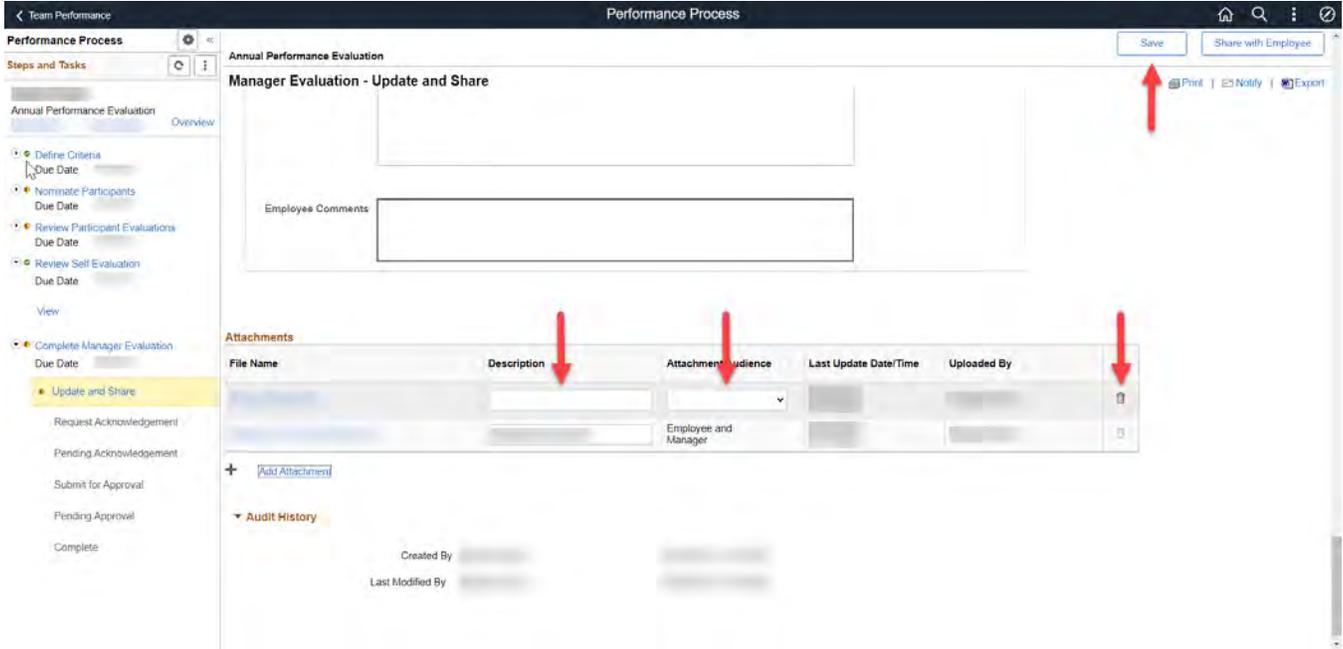


9. A pop-up will appear to upload your document from your computer. Follow the prompts to add your document, clicking “Choose File” and then “Upload.”



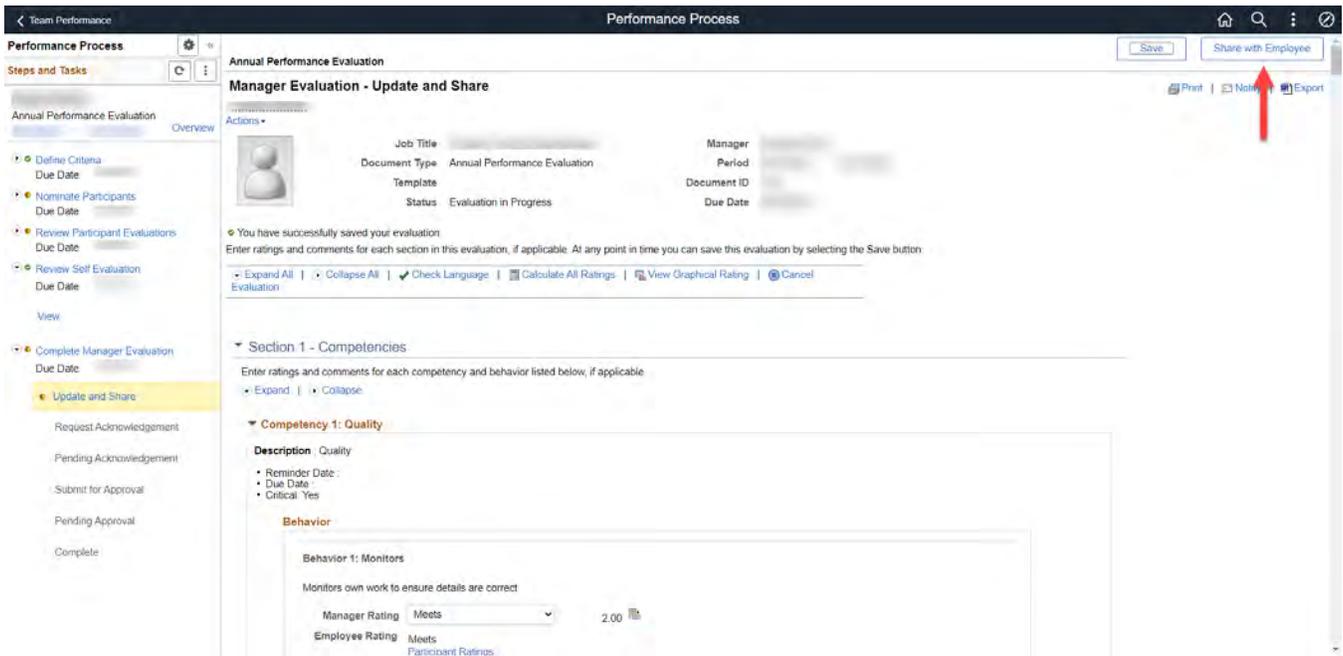
10. When the document is uploaded, you will see the name of the file you uploaded. You can add a short description by typing in the “Description” box. From the “Attachment Audience” drop-down box, select “Employee and Manager” so your employee can view your document. If you need to delete your attachment, click the trash can icon. If the trash can icon is greyed out, it is because that document was added from the

Employee Self Evaluation and cannot be deleted (See: [Reviewing Employee Self Evaluation](#)). Click the “Save” button at the top of the page once you have finished.



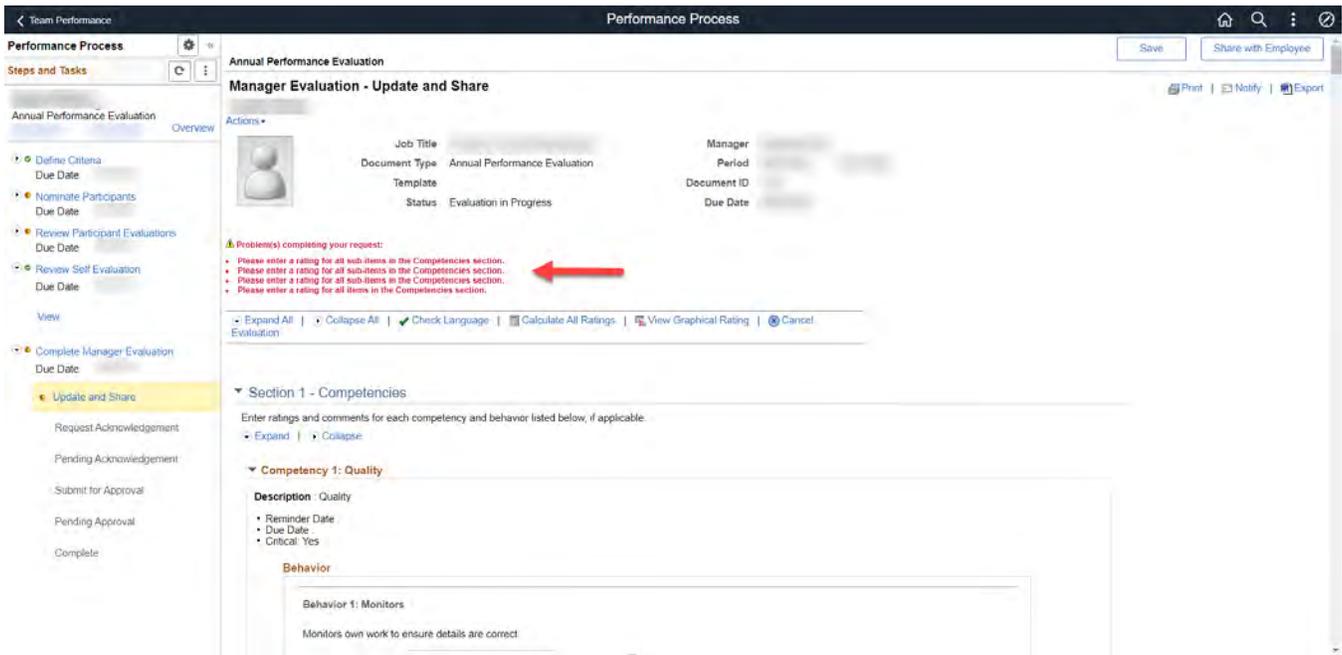
The screenshot shows the 'Manager Evaluation - Update and Share' interface. At the top right, there are buttons for 'Save' and 'Share with Employee'. A red arrow points to the 'Save' button. Below the main content area, there is an 'Attachments' table with columns: File Name, Description, Attachment Audience, Last Update Date/Time, and Uploaded By. Three red arrows point to the 'Description', 'Attachment Audience', and 'Uploaded By' columns. In the left sidebar, the 'Update and Share' section is highlighted in yellow.

11. Once you have completed all ratings for the employee, added all necessary comments and/or documentation, you may click the “Share with Employee” button on the top right of the evaluation window.

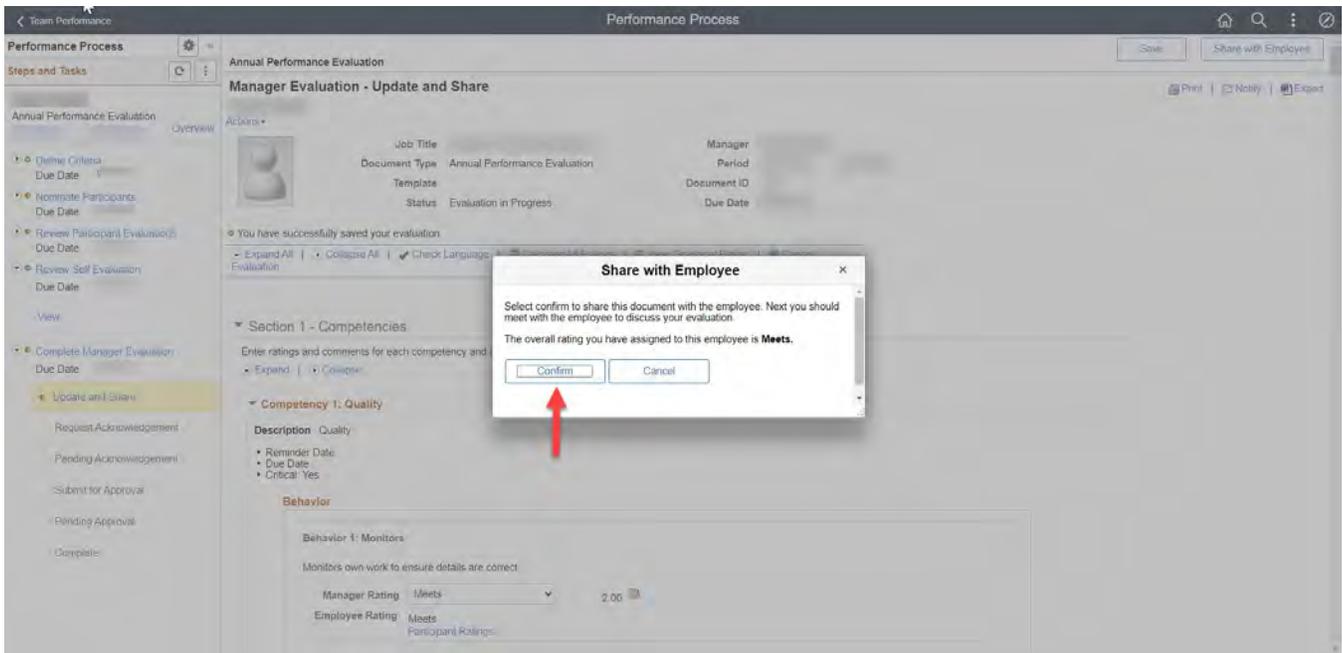


The screenshot shows the 'Manager Evaluation - Update and Share' interface after a successful save. At the top right, the 'Share with Employee' button is highlighted with a red arrow. The main content area displays a success message: "You have successfully saved your evaluation. Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button." Below this, there is a section for 'Competencies' with a table for 'Competency 1: Quality'. The table has columns for 'Description' and 'Quality'. The 'Description' column contains 'Quality' and 'Reminder Date: Due Date Critical Yes'. The 'Quality' column contains 'Behavior 1: Monitors' and 'Monitors own work to ensure details are correct'. The 'Manager Rating' is 'Meets' and the 'Employee Rating' is 'Meets'. A red arrow points to the 'Share with Employee' button.

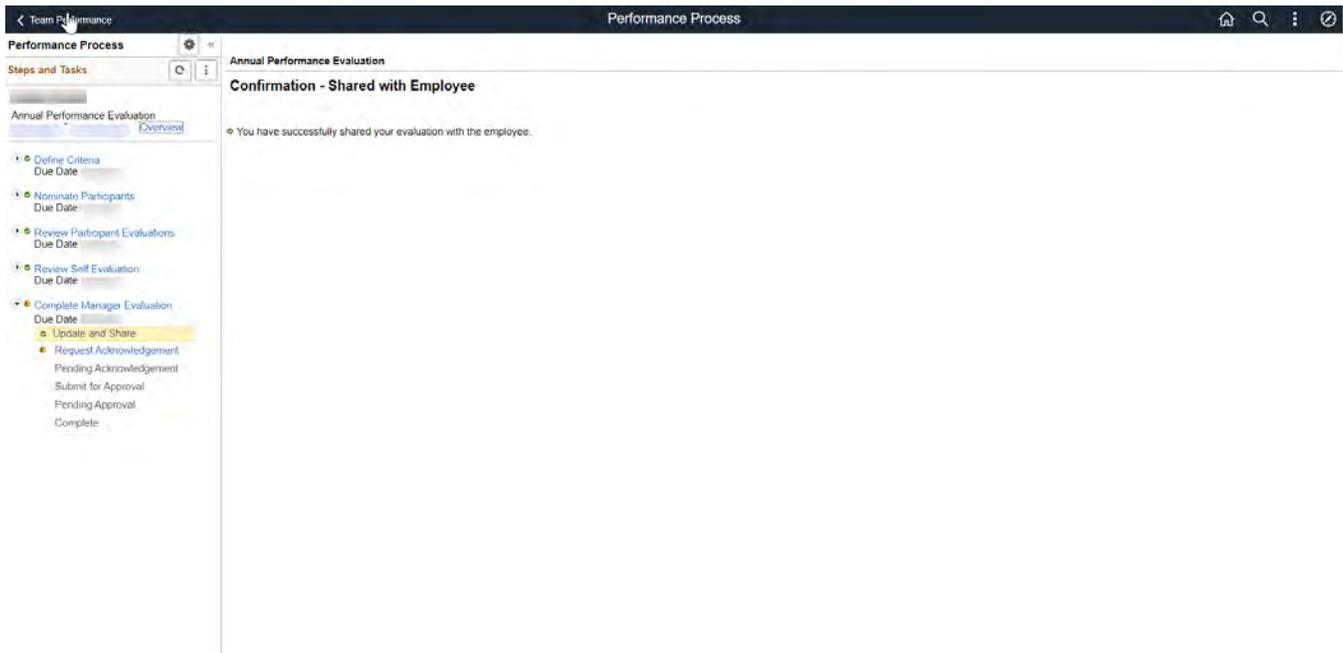
12. If you missed any rating, an error message will display.



13. If you did not miss any ratings, a confirmation window will pop up. Click the “Confirm” button to share your evaluation with your employee.

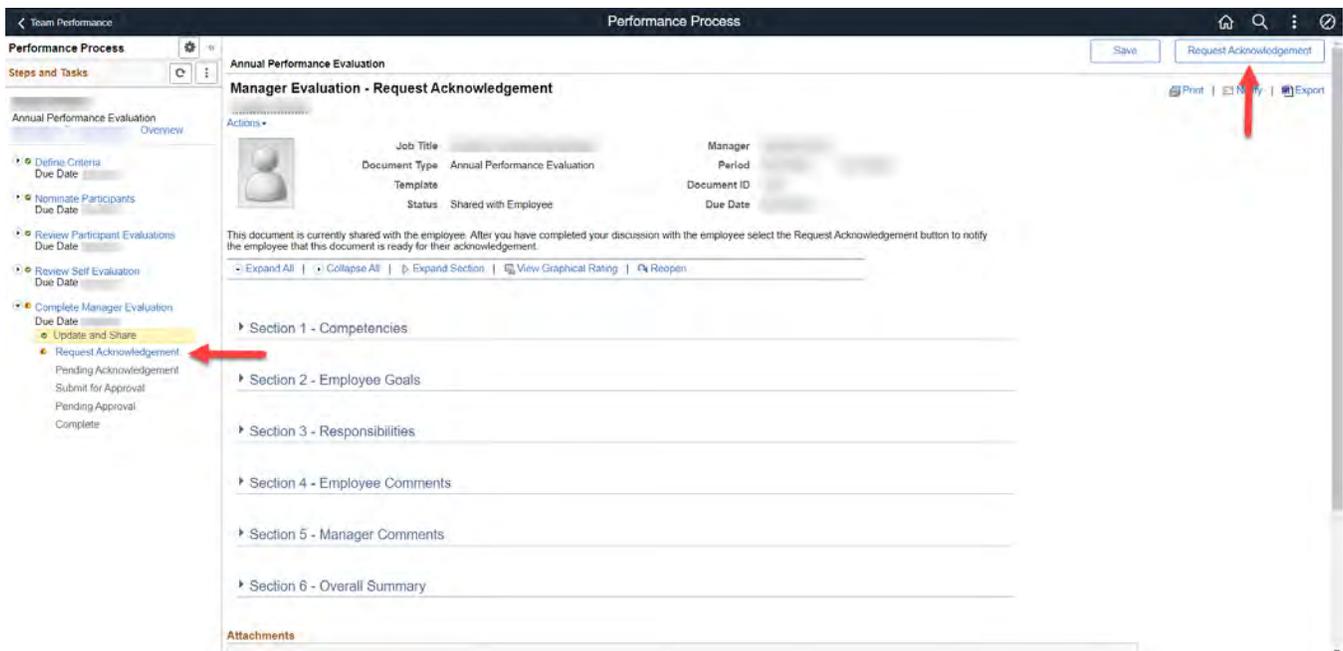


14. A confirmation screen will appear.

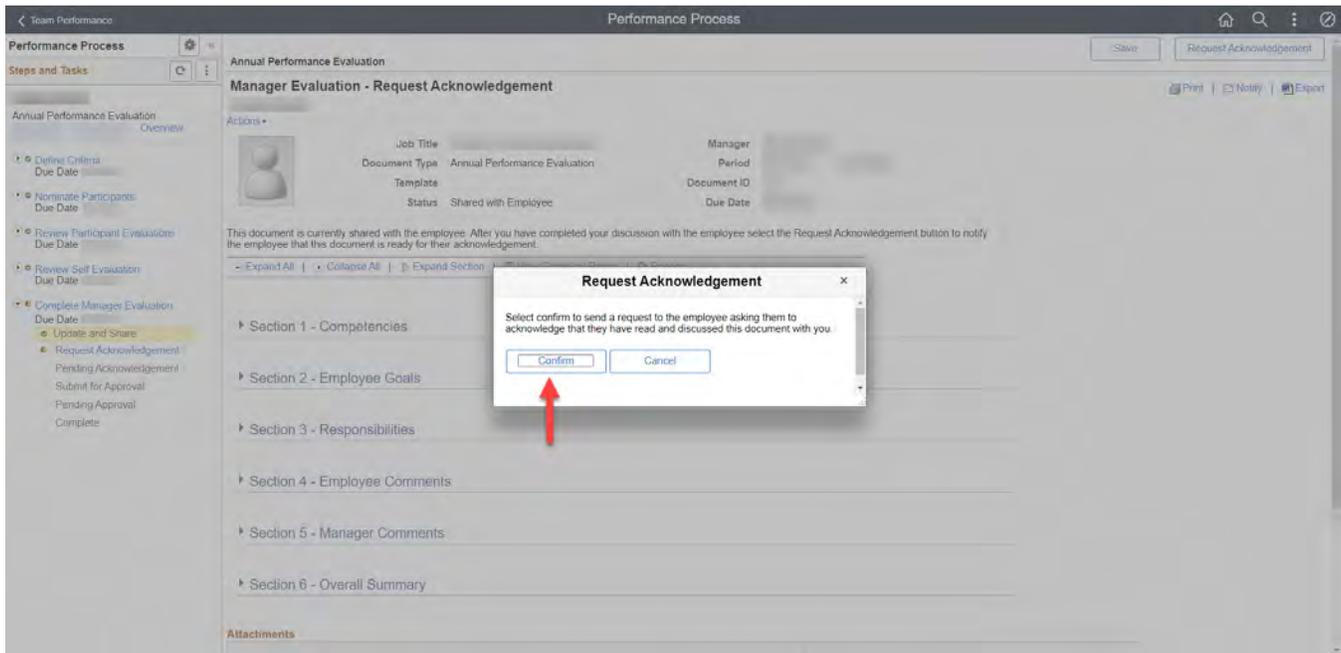


Request Acknowledgement

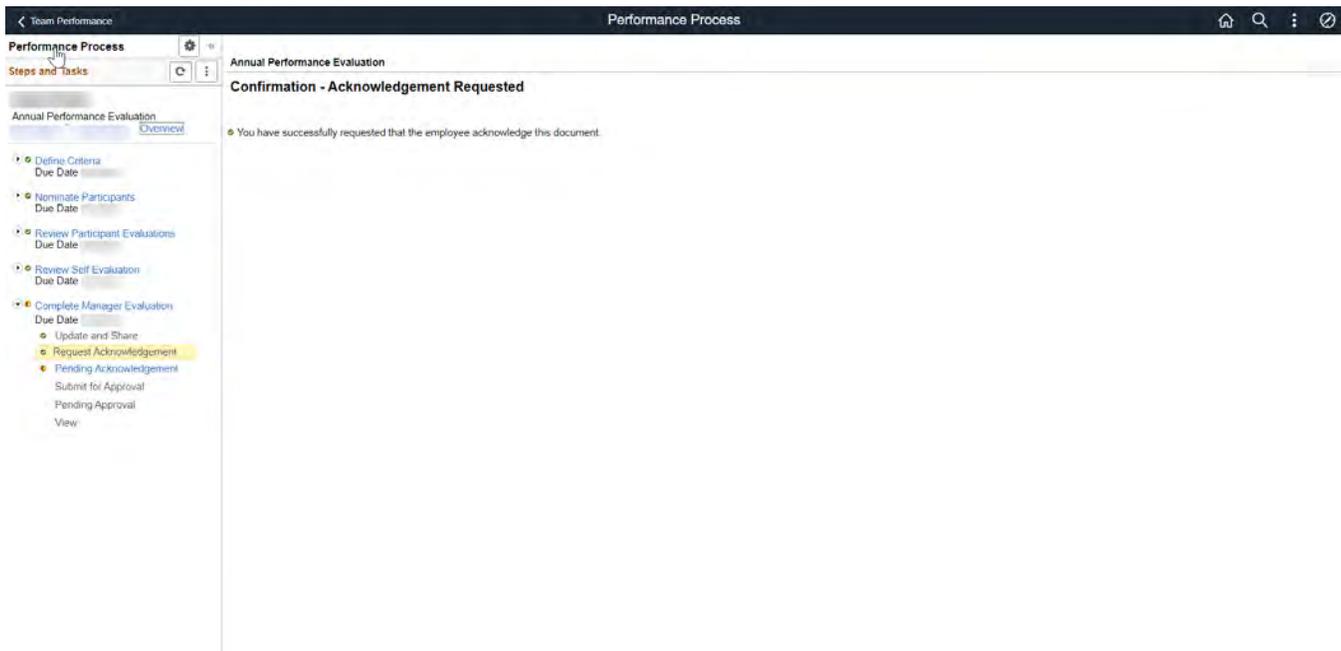
1. In the employee's evaluation, click "Request Acknowledgement" from the left-hand menu, then the "Request Acknowledgement" button in the upper right-hand corner of the page.



2. A confirmation box will appear, click the "Confirm" button to confirm your selection.

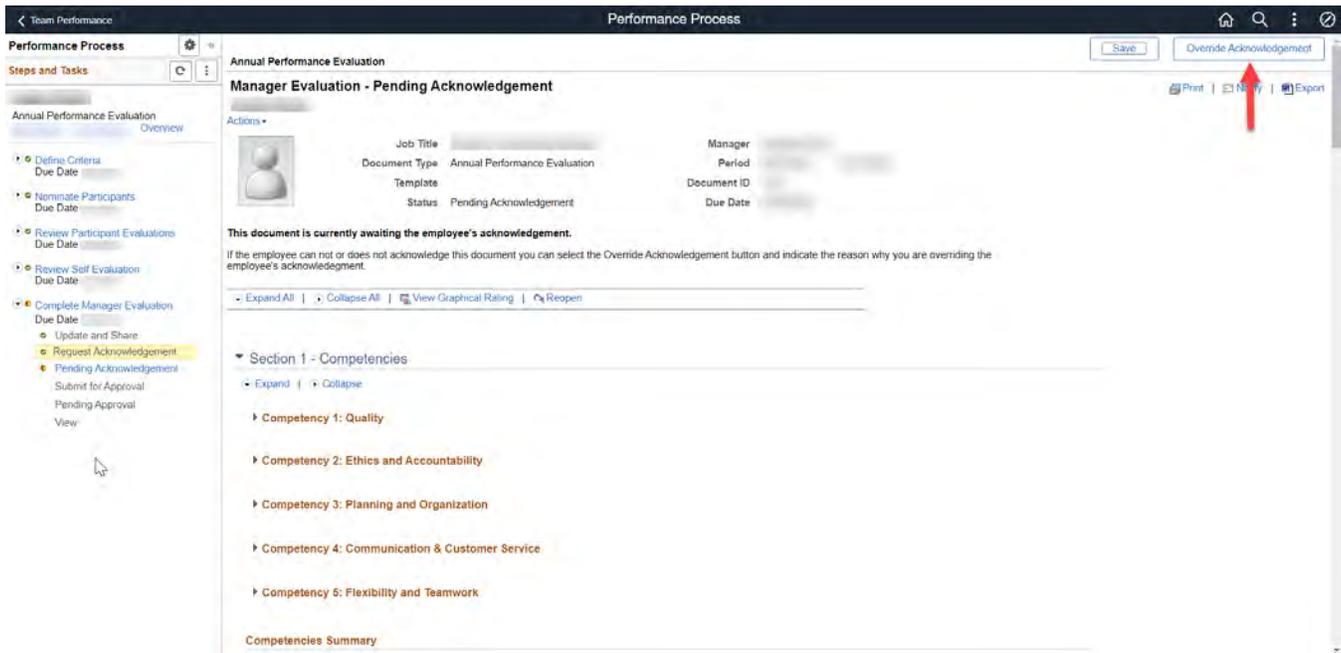


3. You will receive a confirmation message.

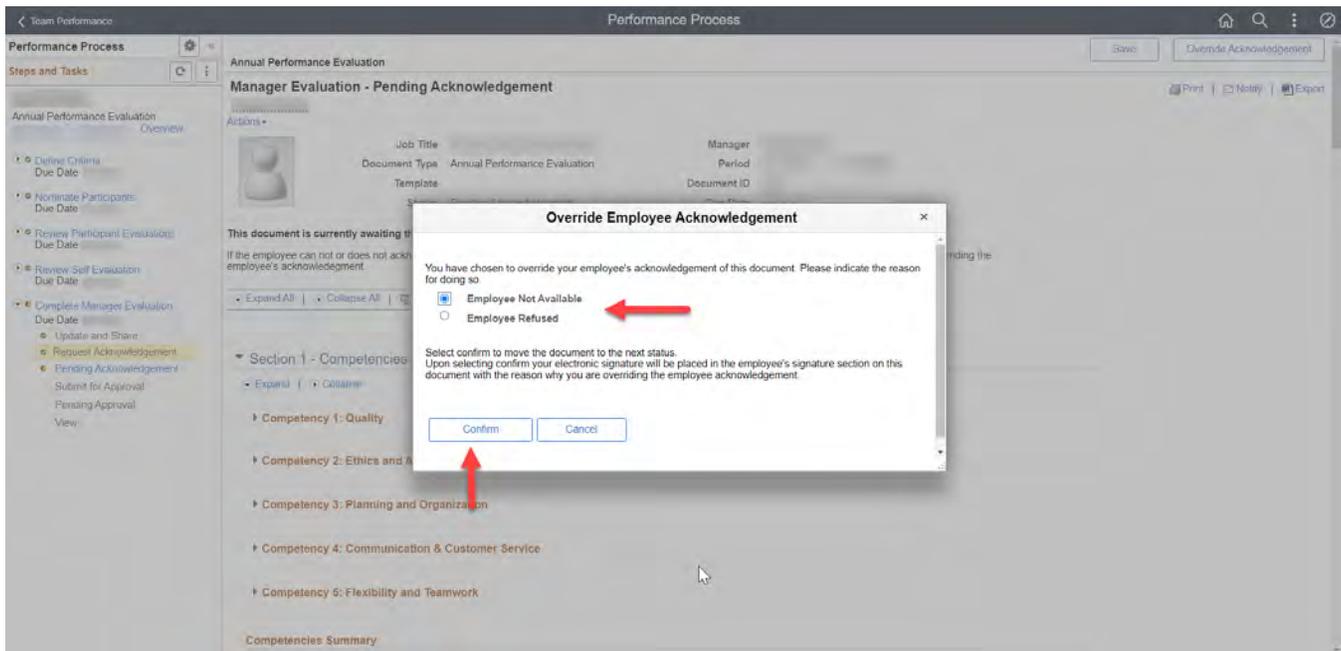


Overriding Acknowledgement

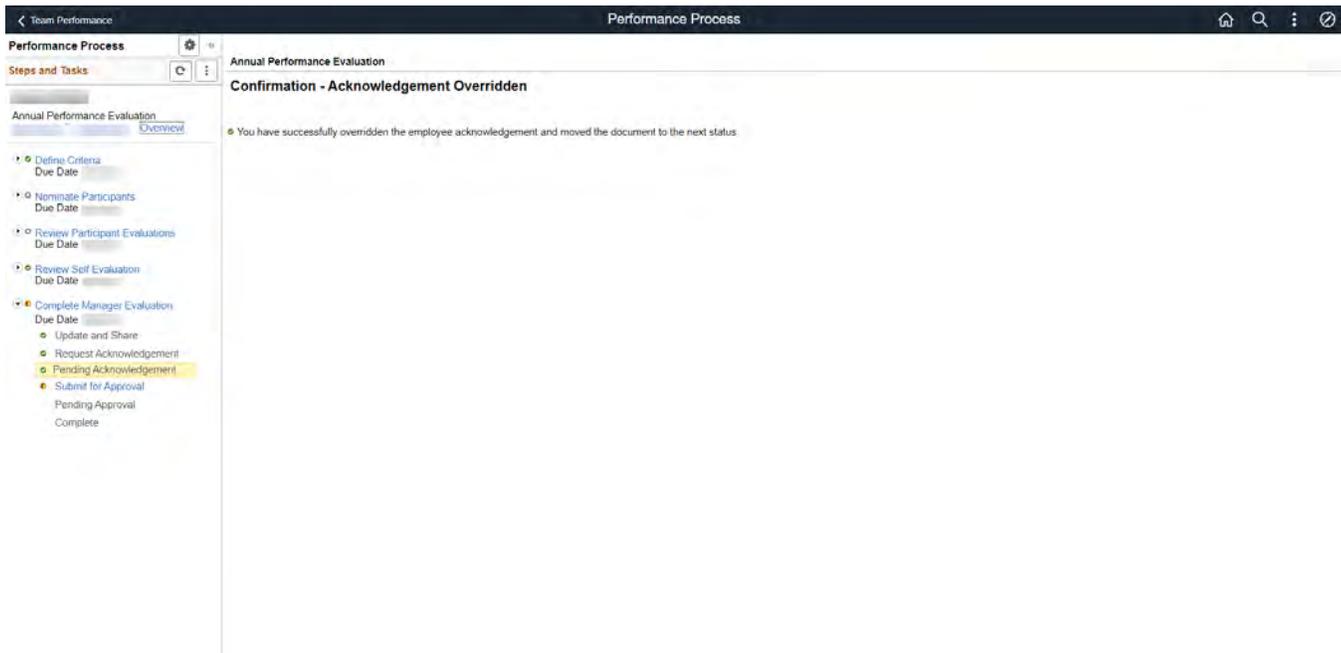
1. If your employee is either unavailable or refuses to acknowledge the Manager Evaluation, you can override their acknowledgement. To do so, click the text “Pending Acknowledgement,” and then the “Override Acknowledgement” button.



2. Then select a reason for the override and click "Confirm."

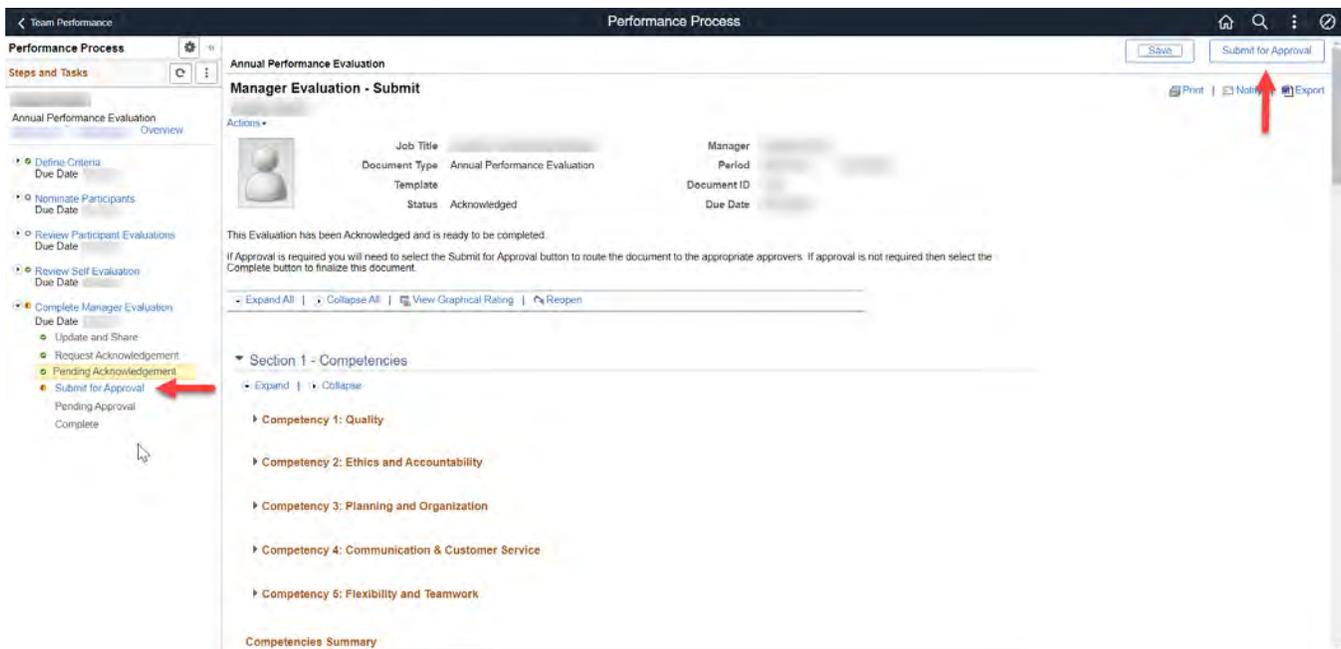


3. A confirmation screen will appear.

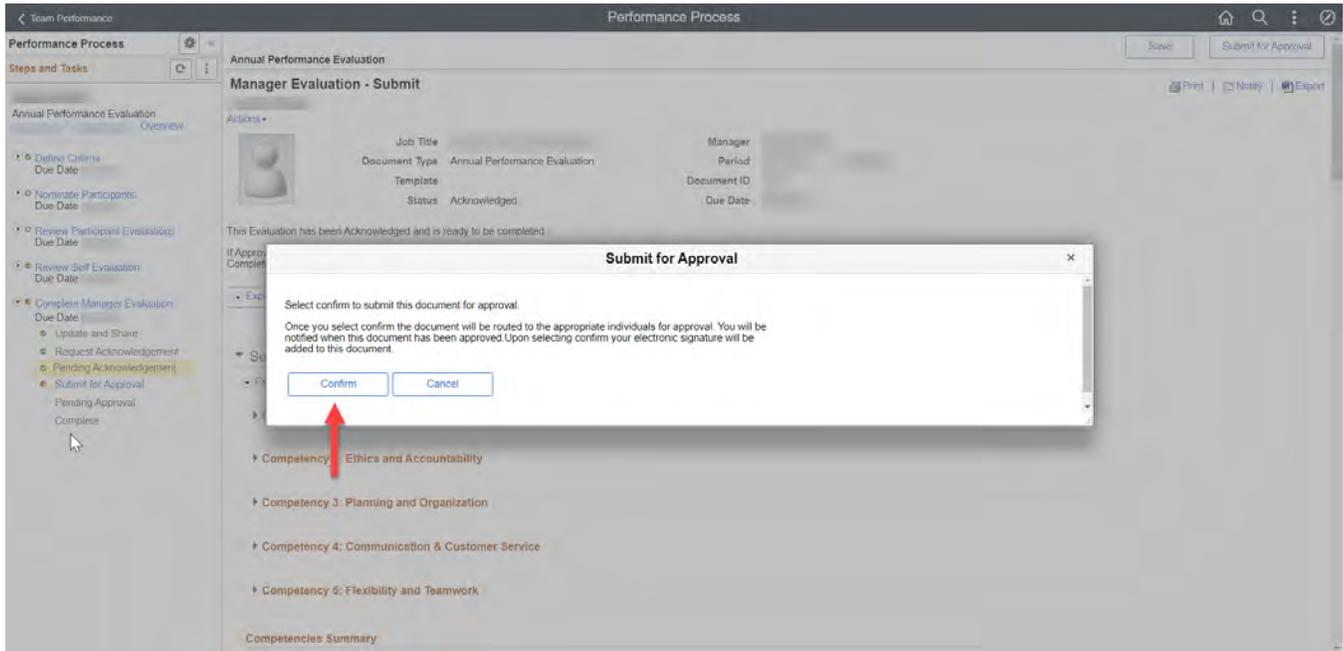


Submit for Approval

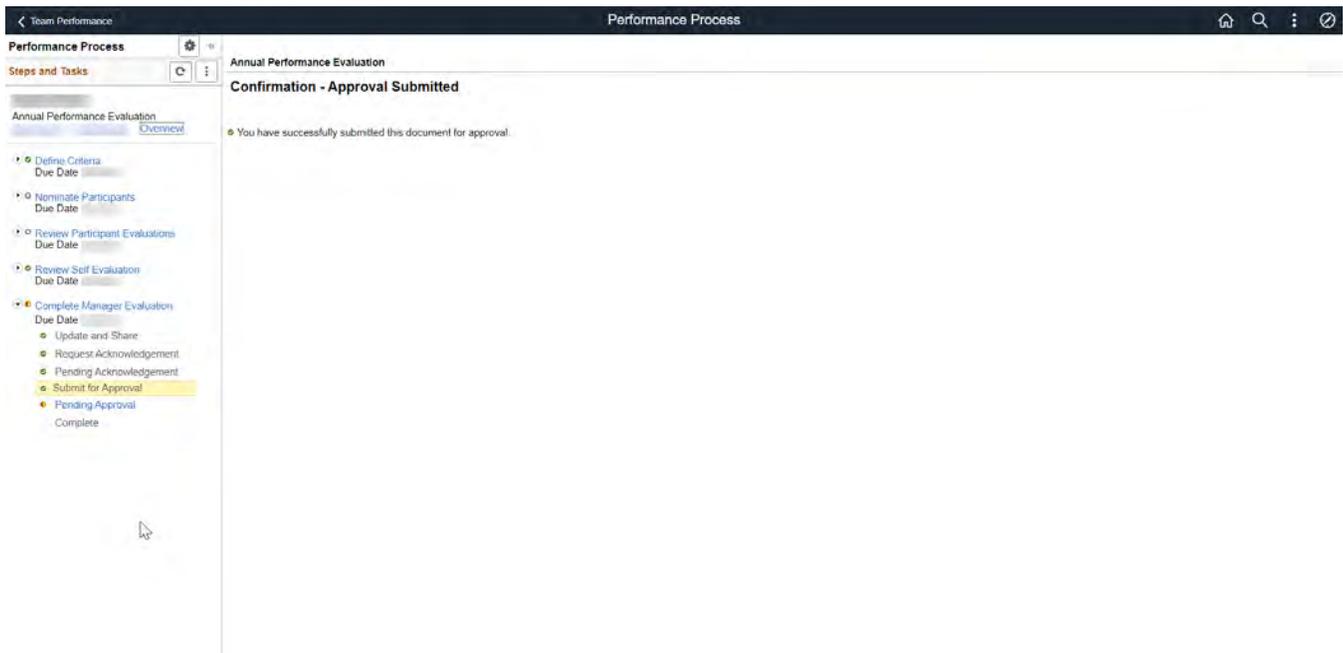
1. Click the “Submit for Approval” text on the left-hand menu of the evaluation. Then click the “Submit for Approval” button on the top right-hand corner of the page.



2. A confirmation box will appear. Click the “Confirm” button.



3. You will receive confirmation that the evaluation has been submitted for approval.

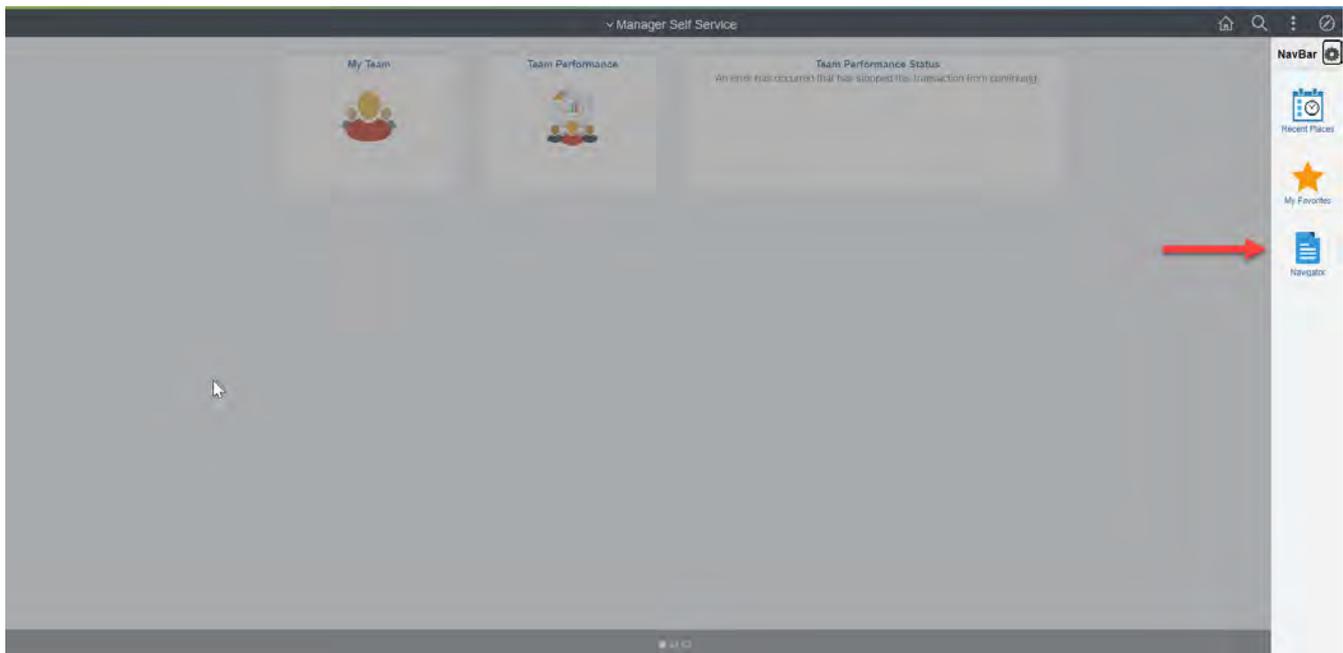


APPROVING EVALUATIONS

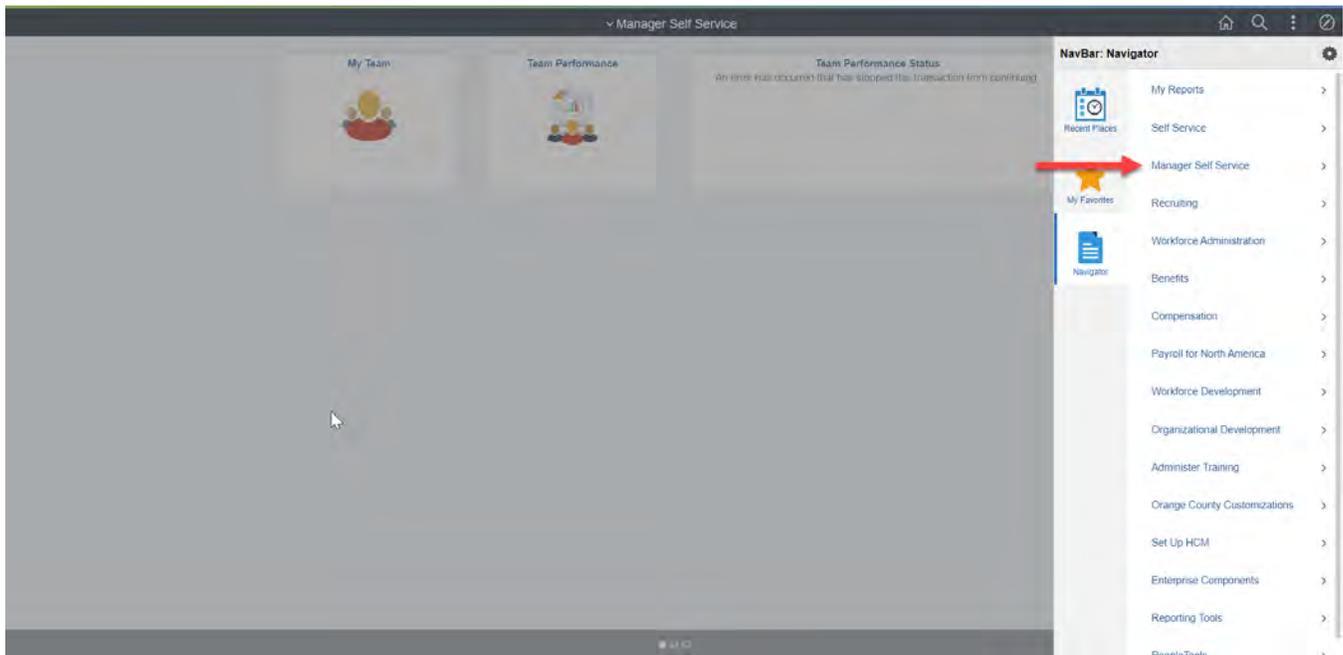
1. On the Manager Self Service homepage in MyOCPortal, click on the NavBar symbol.



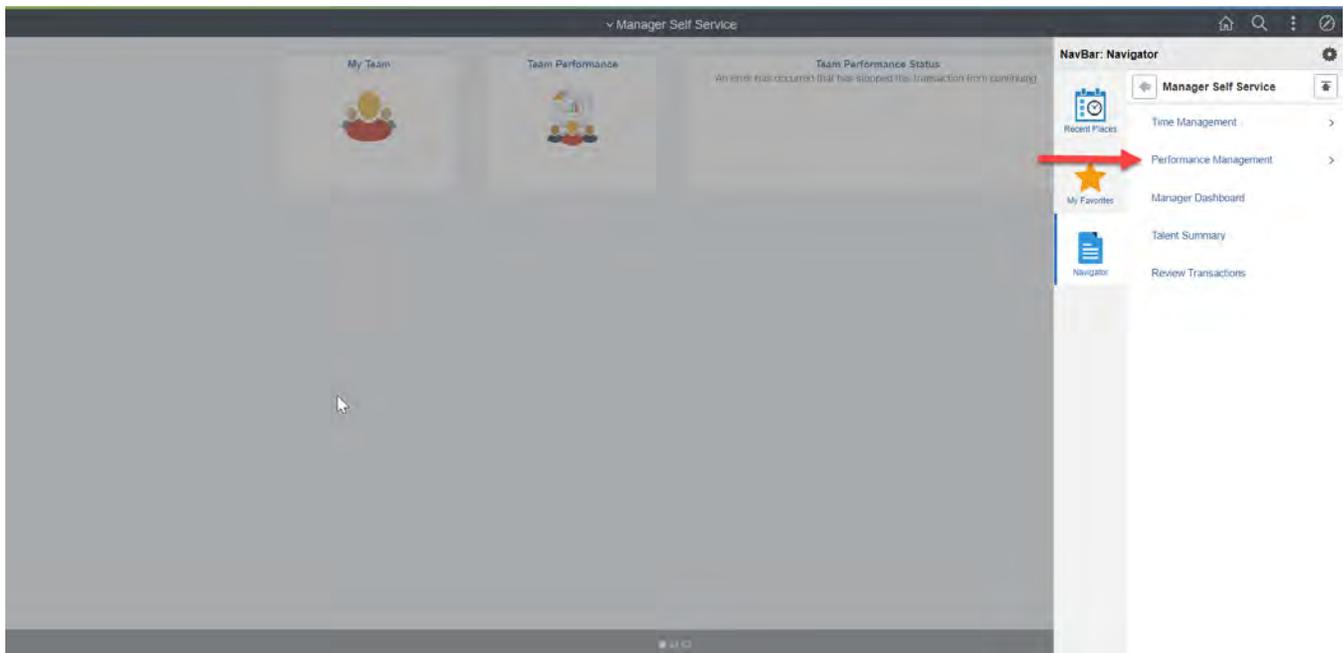
2. Click on “Navigator.”



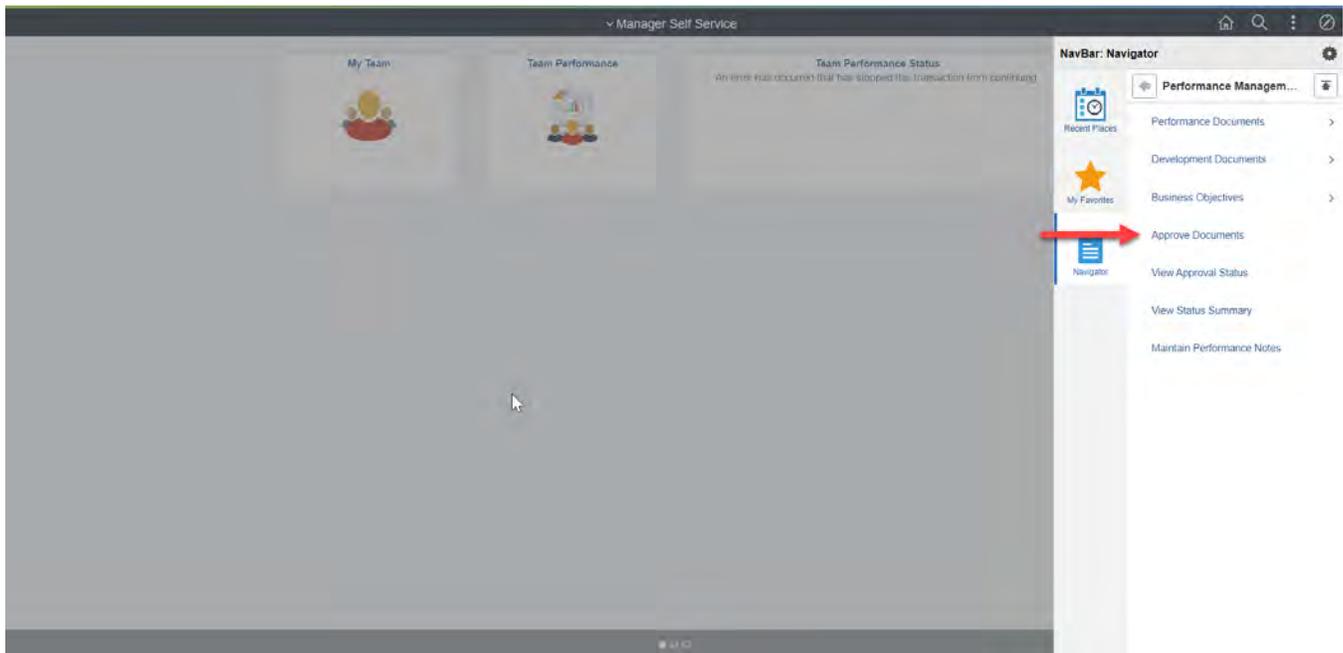
3. Click on “Manager Self Service.”



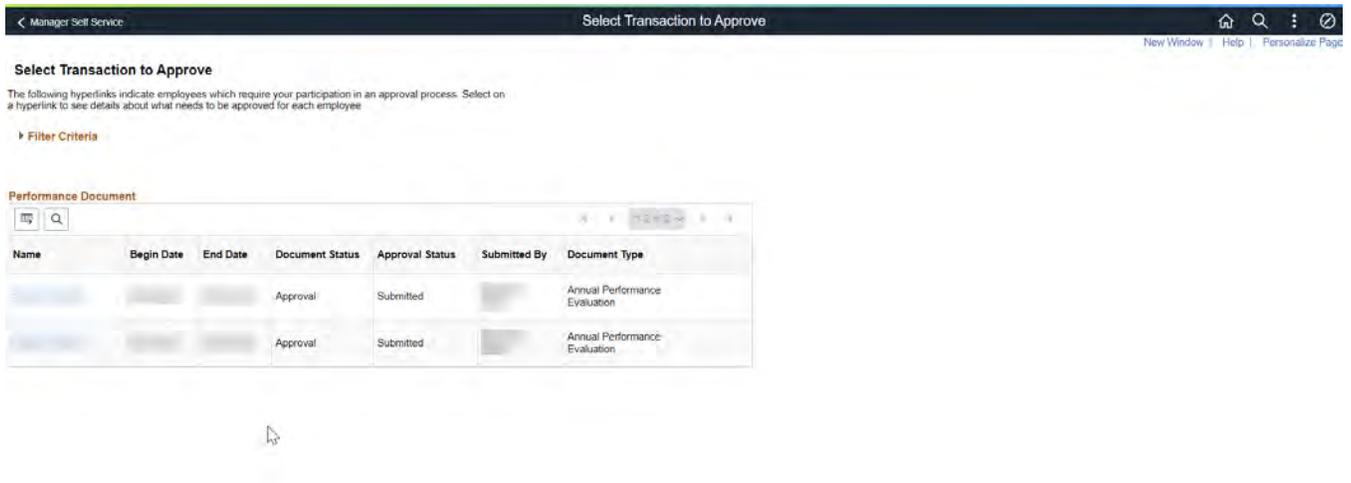
4. Click on "Performance Management."



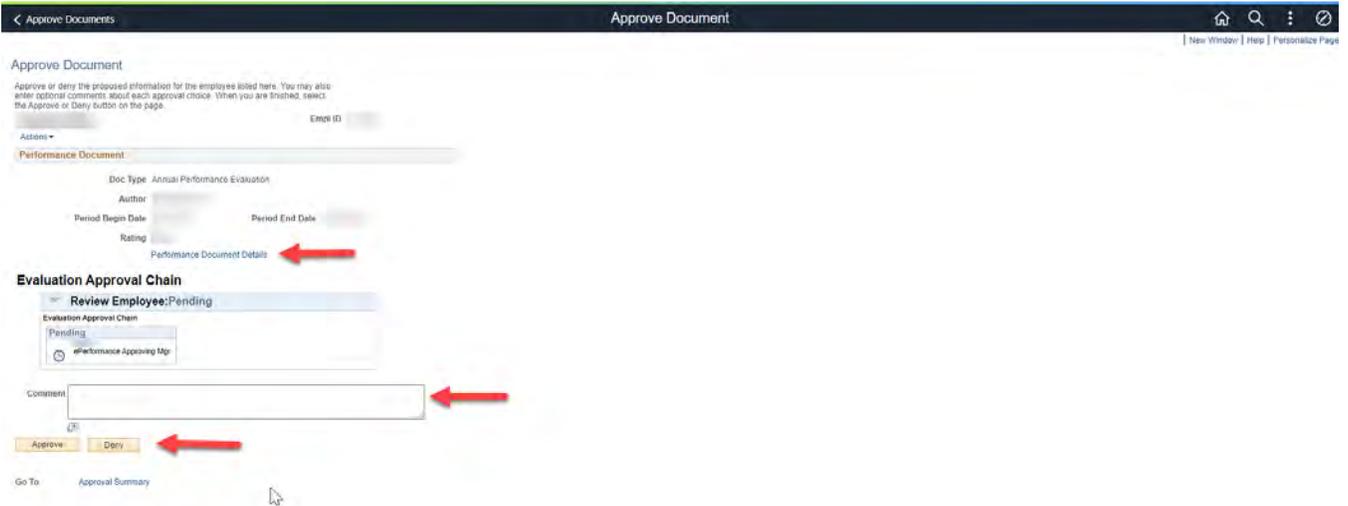
5. Click on "Approve Documents."



6. The documents eligible for approval will be displayed. Click on the one you wish to approve.



7. Clicking “Performance Document Details” will display a summary of the employee and manager evaluation. You can add comments in the comment box. Click “Approve” or “Deny.”



Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Actions

Performance Document

Doc Type: Annual Performance Evaluation

Author: [Redacted]

Period Begin Date: [Redacted] Period End Date: [Redacted]

Rating: [Redacted]

Performance Document Details

Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

Pending

ePerformance Approving Mgr

Comment: [Redacted]

Approve Deny

Go To: Approval Summary

8. You will receive an approval confirmation. Click the “Close” button.



Approve Documents (Hidden)

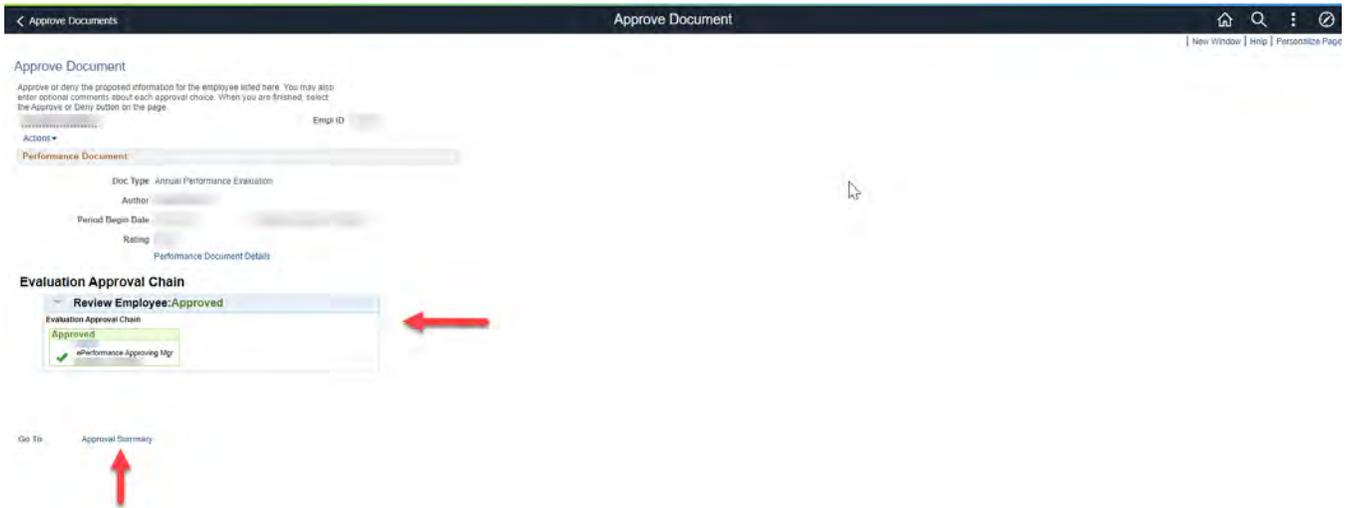
Approve Document

Save Confirmation

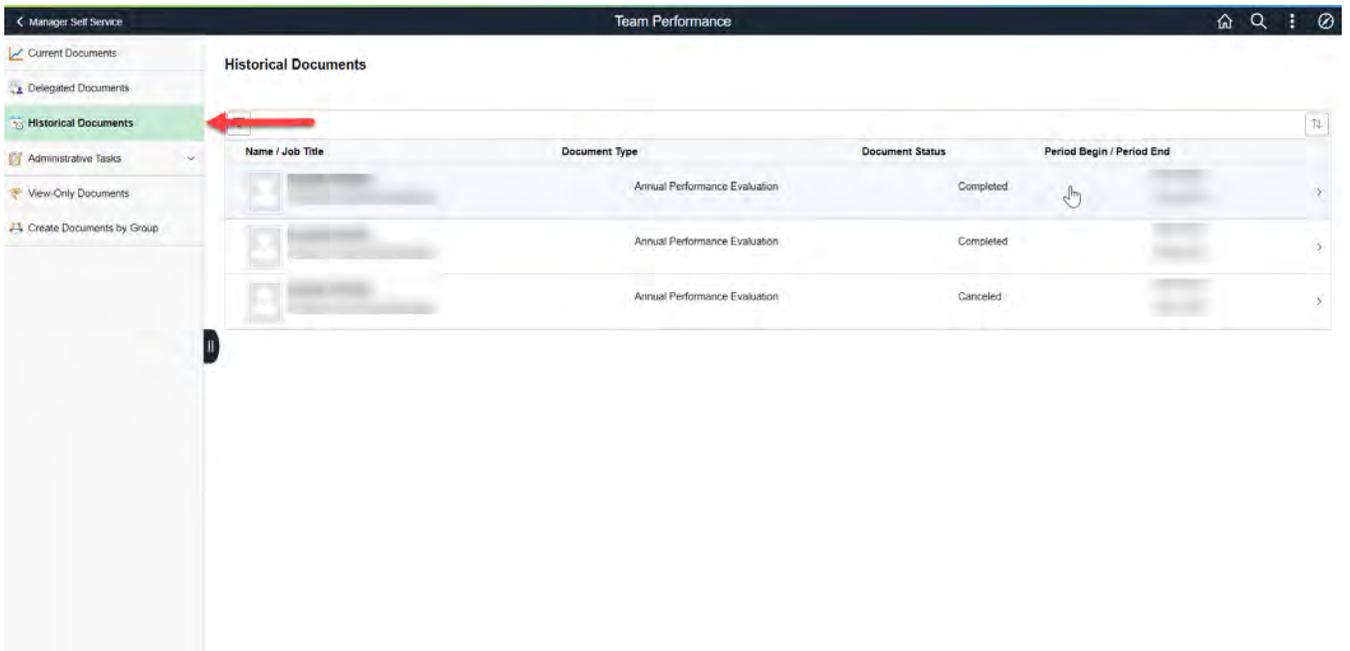
✓ The Save was successful

Close

9. You will see a green “Approved” status on the evaluation. Click “Approval Summary” to return to remaining evaluations that are pending approval.



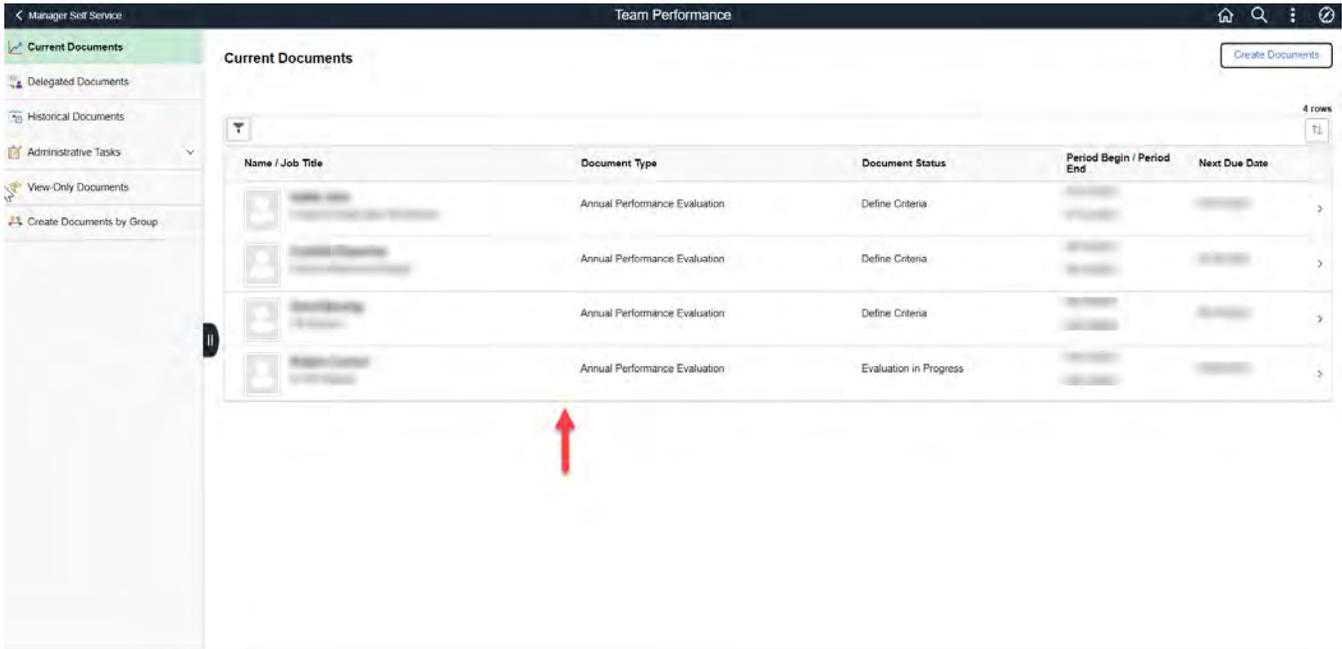
Note: Once an employee’s evaluation has been approved, its status will be “Completed.” It will no longer be displayed in an employee’s or supervisor’s “Current Documents” but will can be found in their “Historical Documents” menu.



| Name / Job Title | Document Type | Document Status | Period Begin / Period End |
|------------------|-------------------------------|-----------------|---------------------------|
| [Redacted] | Annual Performance Evaluation | Completed | [Redacted] |
| [Redacted] | Annual Performance Evaluation | Completed | [Redacted] |
| [Redacted] | Annual Performance Evaluation | Canceled | [Redacted] |

CANCELING AN EVALUATION

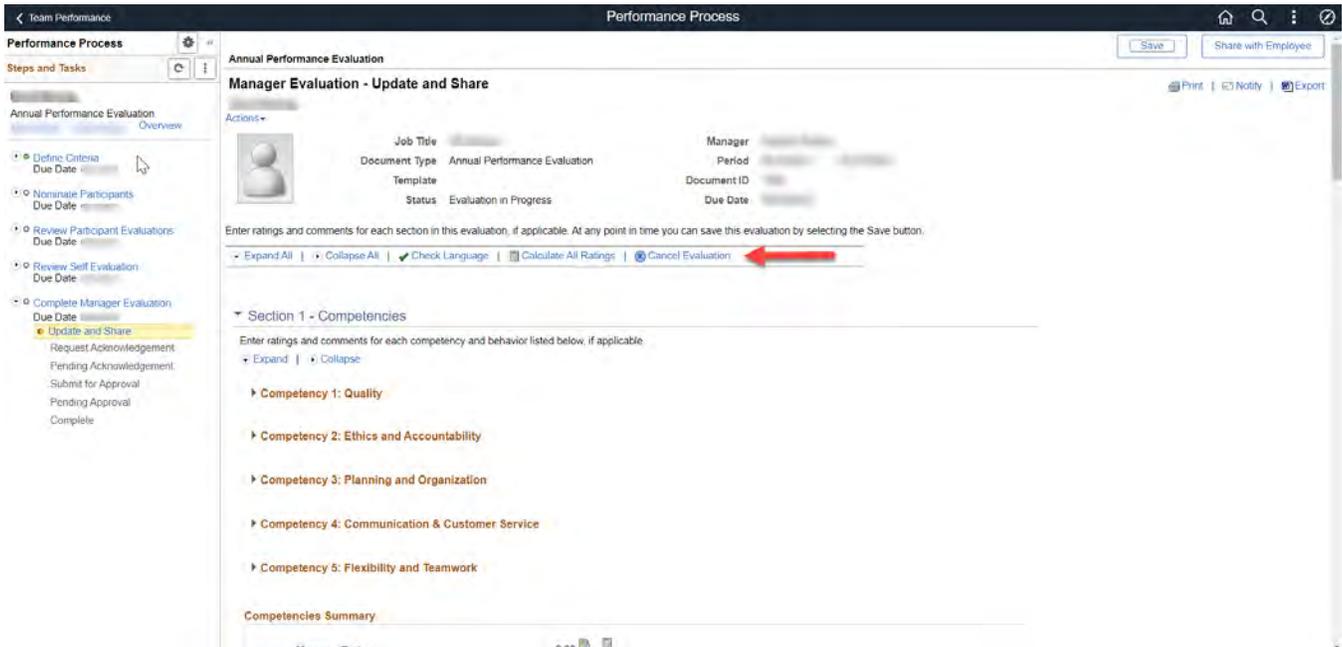
1. To cancel an evaluation, locate it on the “Current Documents” page and click on the evaluation you wish to cancel. **Note: You can only cancel evaluations that have criteria that have been approved, not ones with the status of “Define Criteria.”**



The screenshot shows the 'Current Documents' page. The table contains the following data:

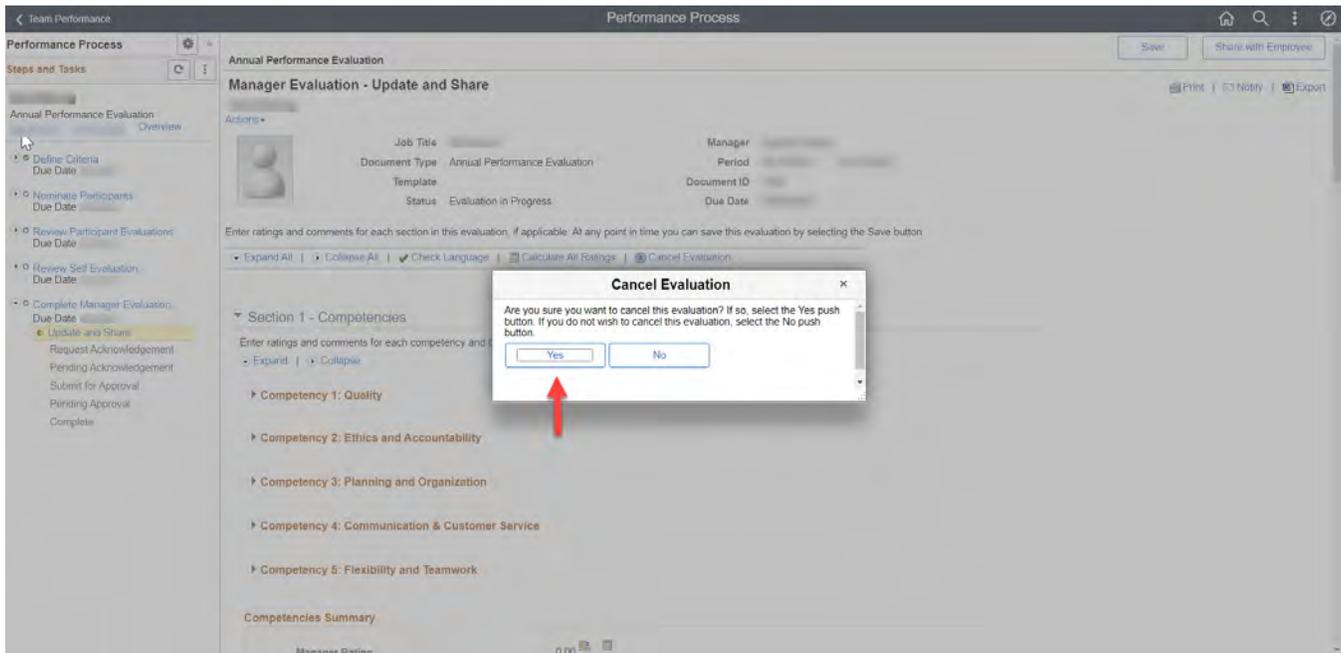
| Name / Job Title | Document Type | Document Status | Period Begin / Period End | Next Due Date |
|------------------|-------------------------------|------------------------|---------------------------|---------------|
| [Redacted] | Annual Performance Evaluation | Define Criteria | [Redacted] | [Redacted] |
| [Redacted] | Annual Performance Evaluation | Define Criteria | [Redacted] | [Redacted] |
| [Redacted] | Annual Performance Evaluation | Define Criteria | [Redacted] | [Redacted] |
| [Redacted] | Annual Performance Evaluation | Evaluation in Progress | [Redacted] | [Redacted] |

2. Click on the “Cancel Evaluation” link.



The screenshot shows the 'Performance Process' page for an 'Annual Performance Evaluation'. The 'Manager Evaluation - Update and Share' section is active. The actions bar includes the following links: Expand All, Collapse All, Check Language, Calculate All Ratings, and Cancel Evaluation. A red arrow points to the 'Cancel Evaluation' link.

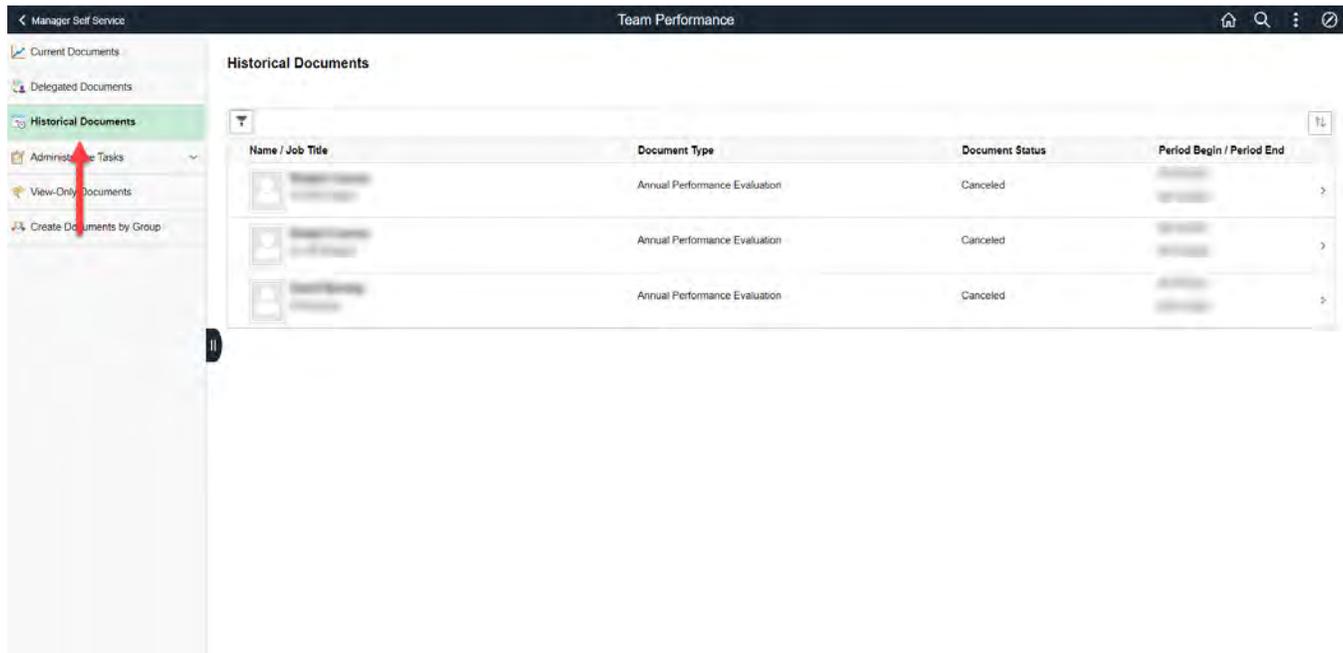
3. Select “Yes” to confirm cancellation.



4. You will be taken to a confirmation page. Clicking on the “Team Performance” button will take you back to the home screen.

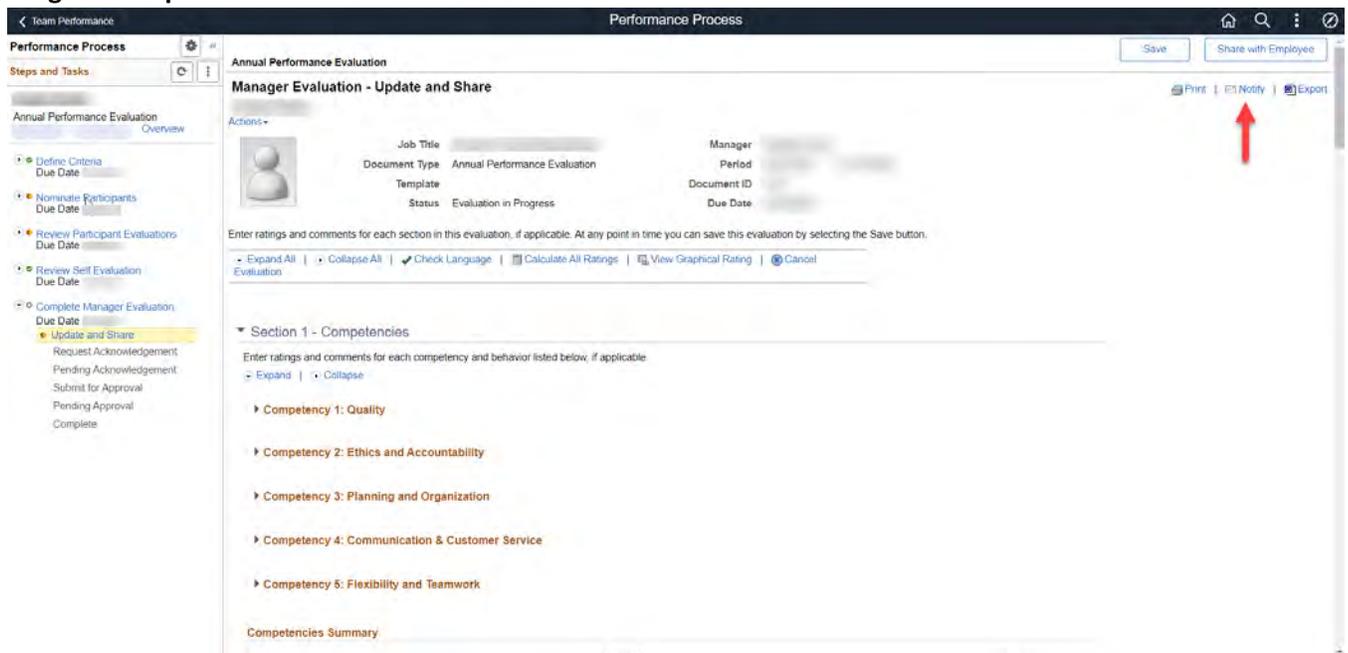


5. If you wish to view all canceled evaluations, you can do so by clicking on “Historical Documents.”



NOTIFYING AN EMPLOYEE

1. Whenever you approve or submit criteria or an evaluation, the employee is sent an automated email. If you wish to send an additional reminder or message, you can do so by selecting the “Notify” button in the upper right-hand part of the screen from the evaluation.



2. A pop-up box will appear. You can type your message in the “Message Text” box and click “Send”. The employee will then receive an email from the system.

