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

1. **You will receive an autogenerated email stating that the performance criteria have been approved for your annual performance evaluation.**

From: DoNotReply_D16_TM0@ocfl.net <DoNotReply_D16_TM0@ocfl.net>
Sent:
To:
Subject: The Performance Criteria has been approved

The Performance Criteria has been approved for the following performance document:

Employee:
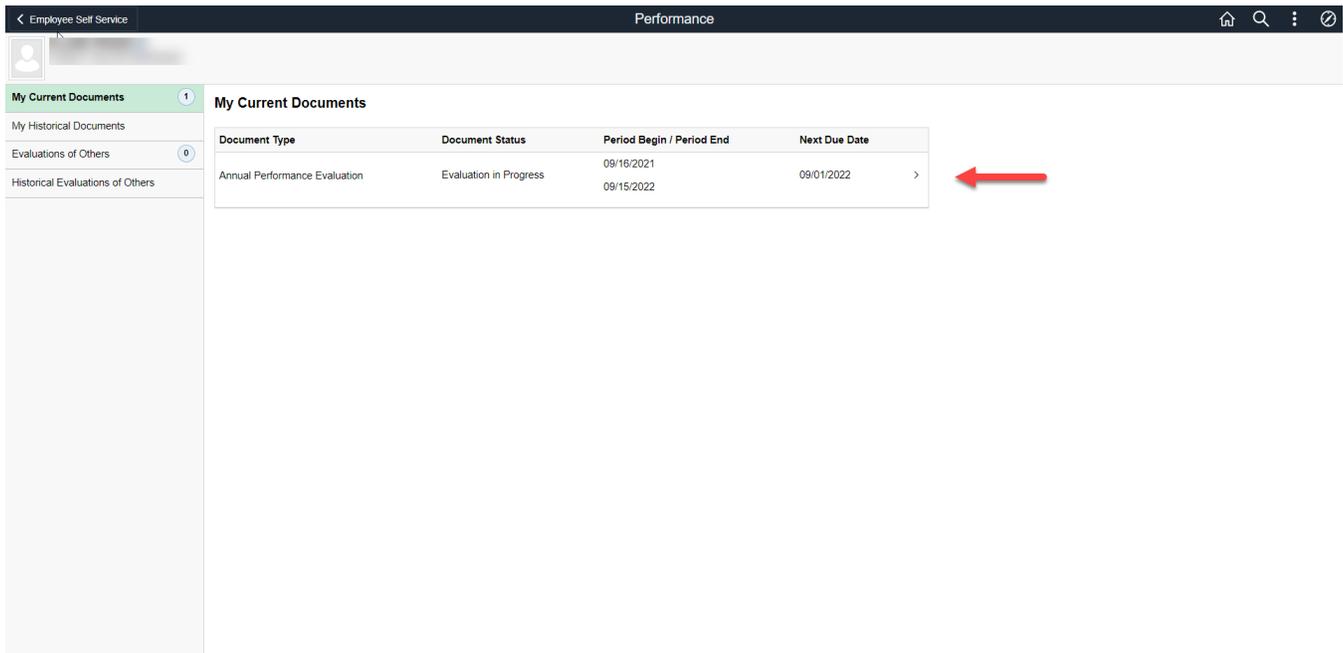Document Type: Annual Performance Evaluation
Period:
Use this link to navigate to the document:

(Please do not respond to this automatic notification.)
PLEASE NOTE: Florida has a very broad public records law (F. S. 119).

2. **Log in to MyOCPortal and click the "Performance" tile.**
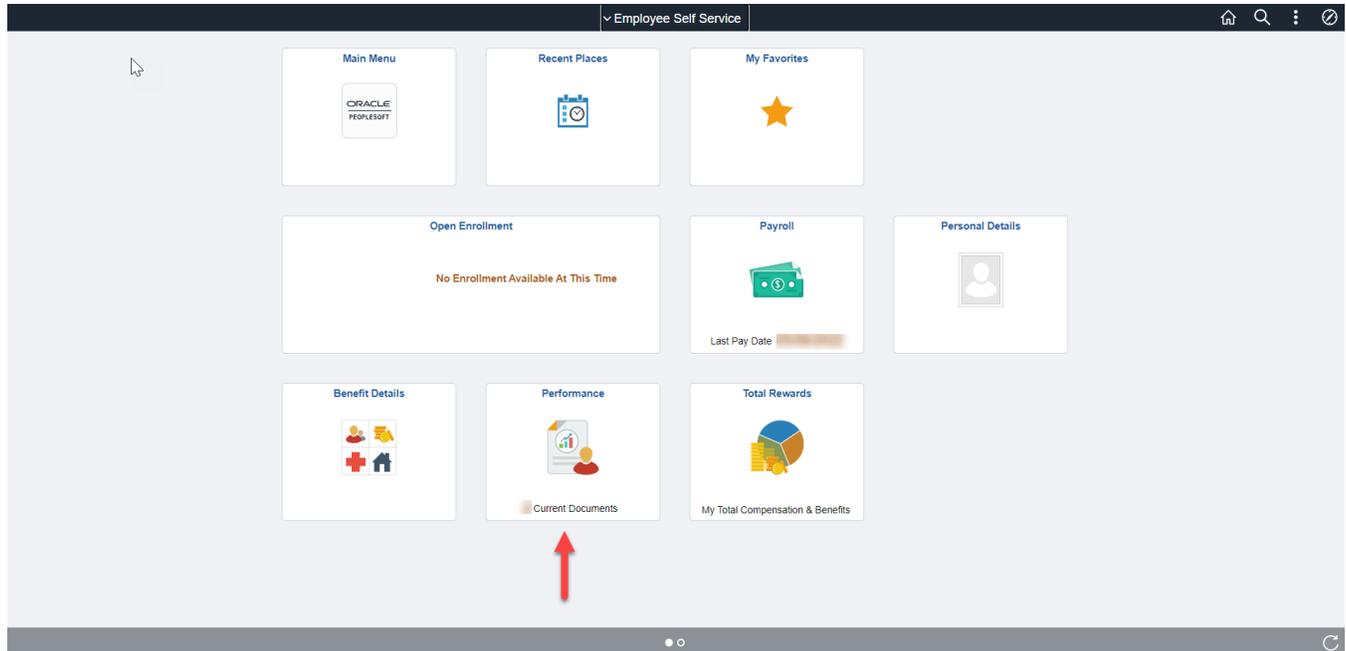
3. **You will be taken to the "Current Documents" section of the Performance homepage. Click on your evaluation.**
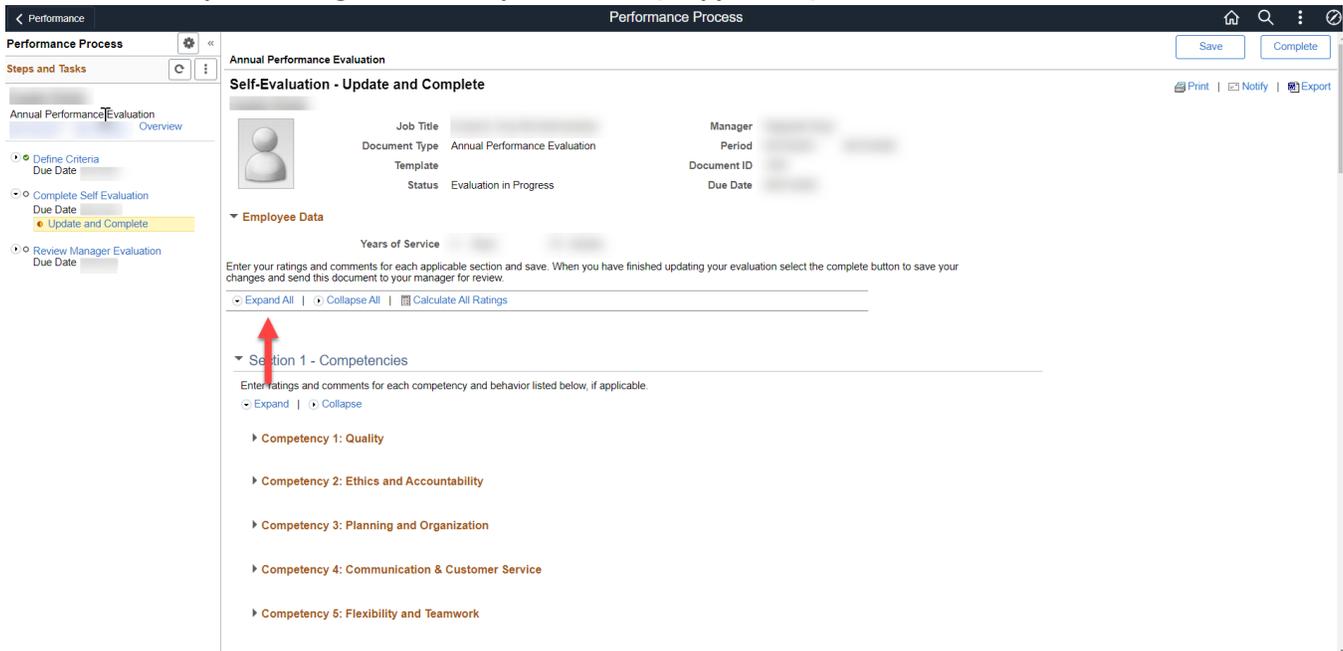
4. Your Competencies and Responsibilities (if applicable) have been automatically populated for you. Your supervisor may have added goals for you. You can also add goals for yourself. Click the "Expand All" text to view all competencies, goals, and responsibilities (if applicable).

5. To add goals for yourself, scroll to Section 2- Employee Goals and click "Add Goal."

6. Select the radial button next to "Add your own goal" and click the "Next" button.
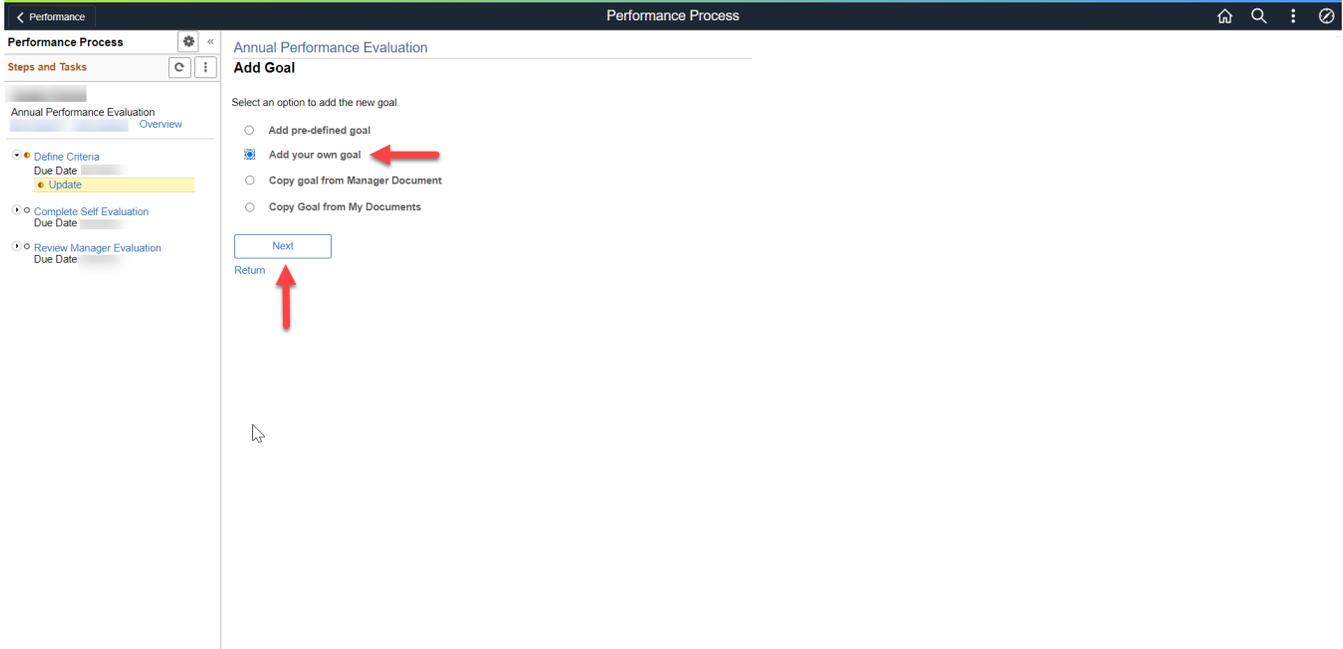
7. On the Add Your Own Goal page, enter a title for your goal, a description, and an anticipated due date. When you are done, click the "Add" button.
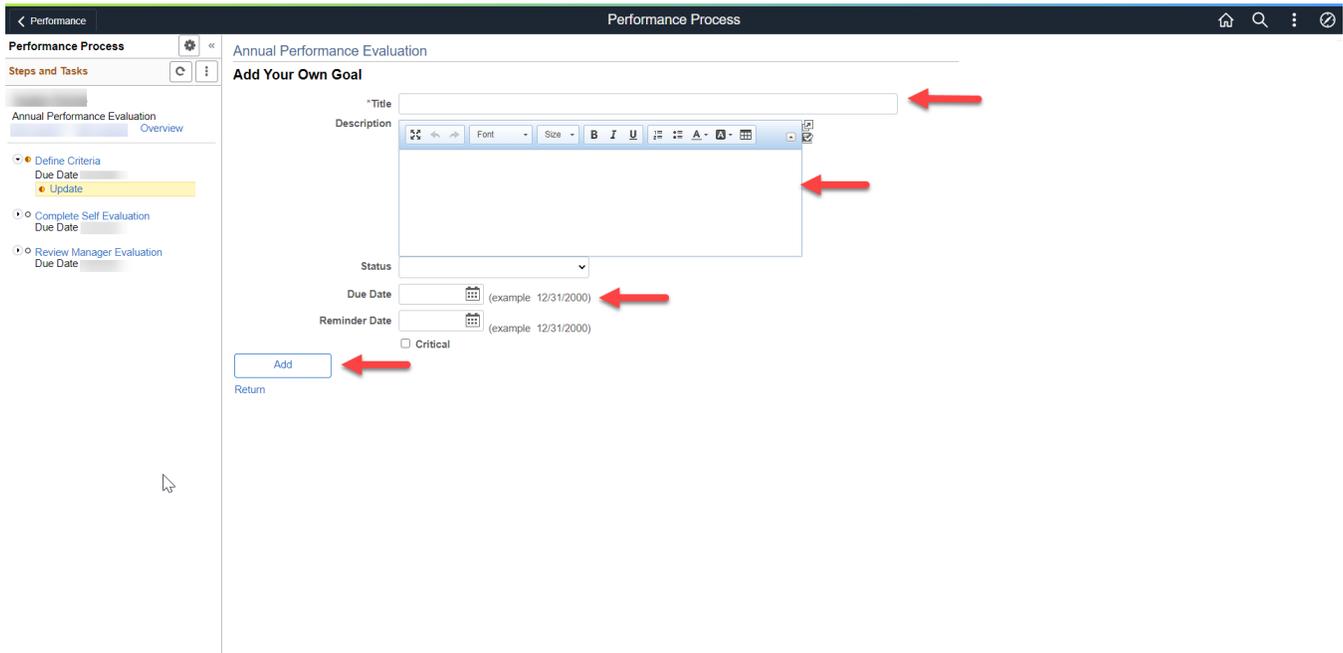
8. After adding your goal, you will return to the evaluation screen. From here, you can add additional goals by repeating the process, edit the goal you added by clicking on the pencil icon, or deleting the goal you added by clicking on the trash can icon. **Be sure to click the "Save" button often to save your entered goals.**

9. Scroll through each of the competencies, goals, and responsibilities (if applicable) and select a rating for yourself from the drop-down menu. You can also add comments to each section. **Be sure to click the "Save" button often to save your work.**
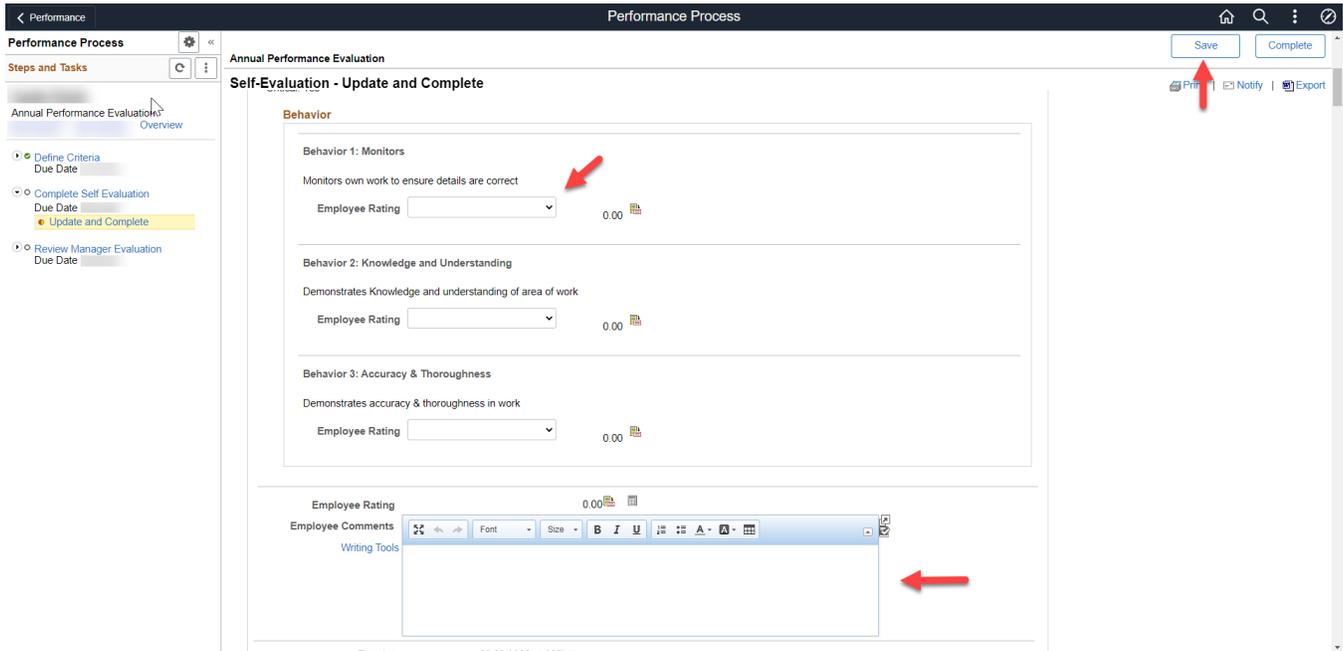
Rating	Numeric Rating	Description
Exceeds	3	Performance consistently exceeds job requirements, demonstrates exceptional productivity, efficiency, and effectiveness. (Written comment is required.)
Meets	2	Performance consistently meets job requirements, demonstrates productivity, effectiveness, and competency
Needs Improvement	1	Performance does not consistently meet all job requirements; improvement is necessary to attain expected level of performance. (Written comment is required.)

10. **As an employee, you can add comments to any of your ratings and each summary. You can also add comments to Section 4: Employee Comments and Section 6: Overall Summary. You may also add attachments to your evaluation that support your ratings. Remember to click the "Save" button often to save your work.**

11. To add an attachment, click "Add Attachment." 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."
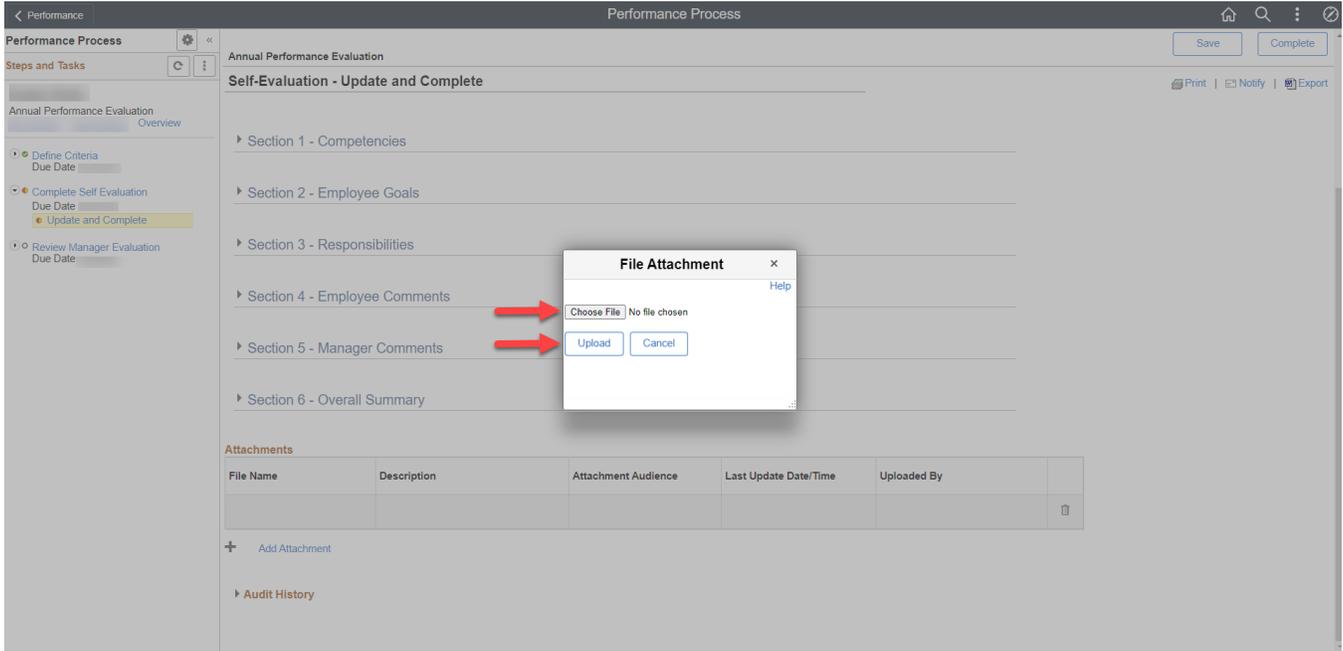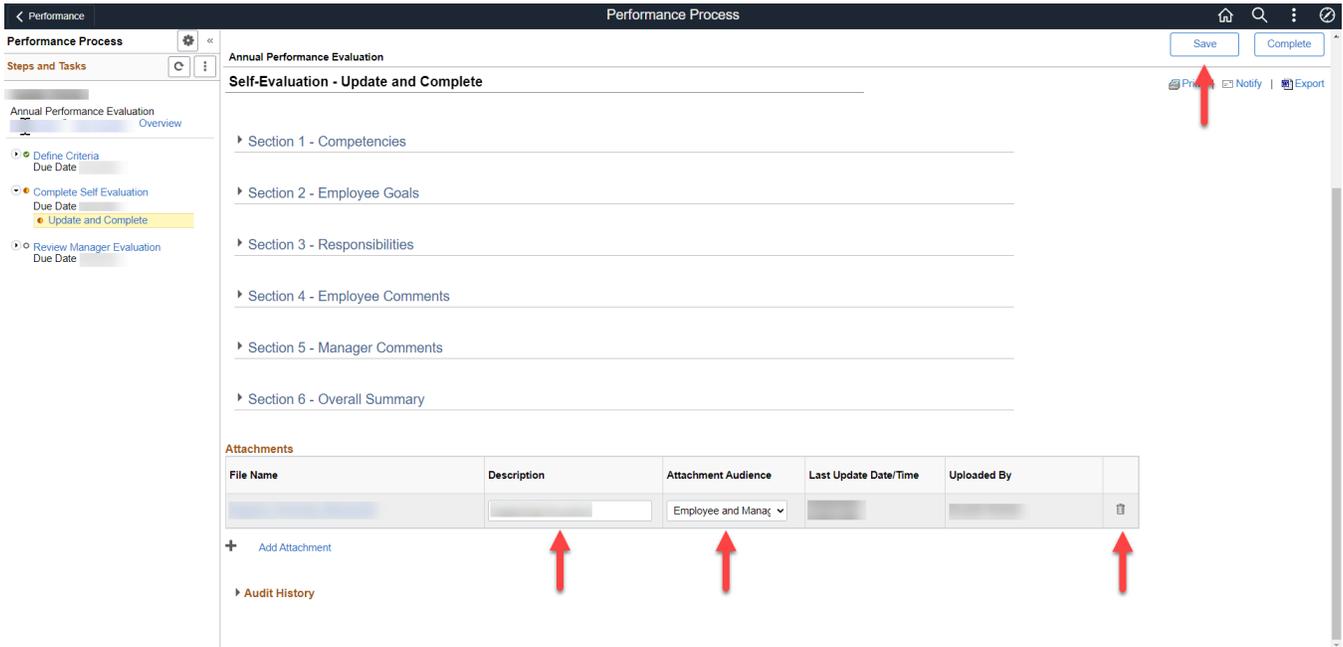

12. When the document is uploaded, you will see the name of the file you uploaded. You can add a short description by typing in the "Description" box. From the "Attachment Audience" drop-down box, select "Employee and Manager" so your supervisor can view your document. If you need to delete your attachment, click the trash can icon. Click the "Save" button at the top of the page once you have finished.

13. Once you have completed your Self Evaluation, selected ratings for <u>all</u> competencies, goals, and responsibilities (if applicable), added all necessary comments, and uploaded any desired attachments, you are ready to submit your evaluation. Click the "Complete" button in the upper right-hand corner of the page.
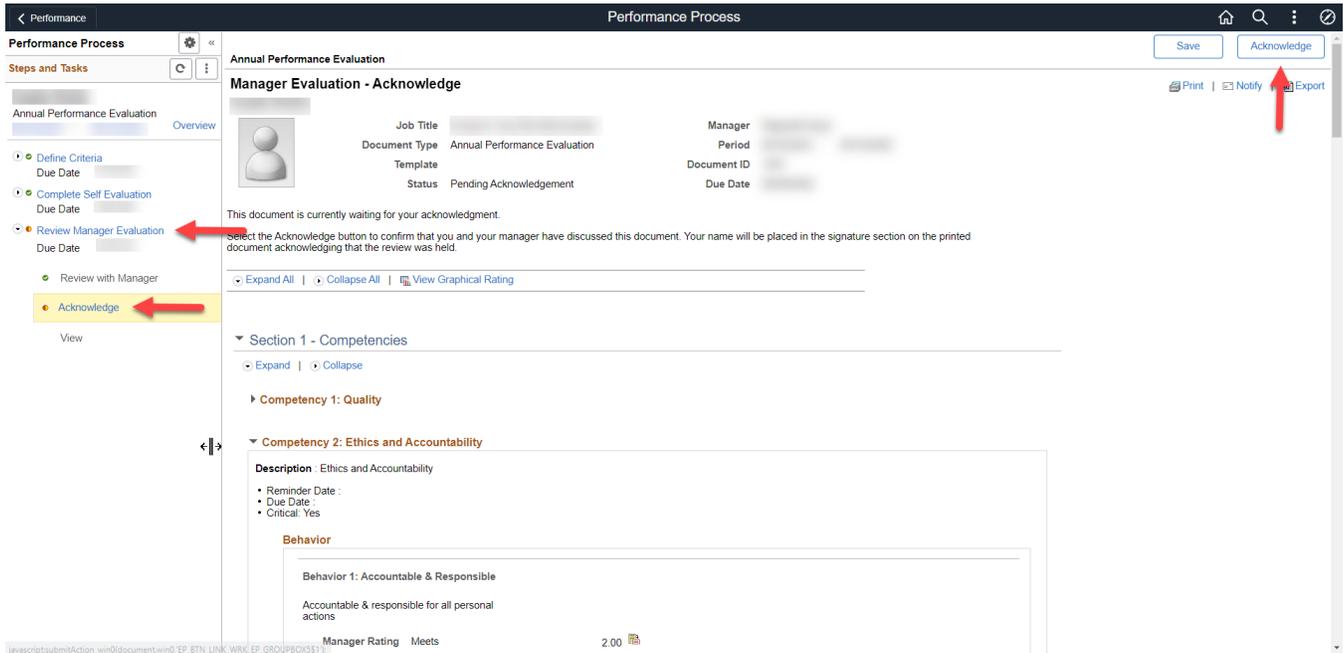

14. You will see a confirmation pop-up. Click "Confirm" to submit or "Cancel" to return to editing your evaluation.
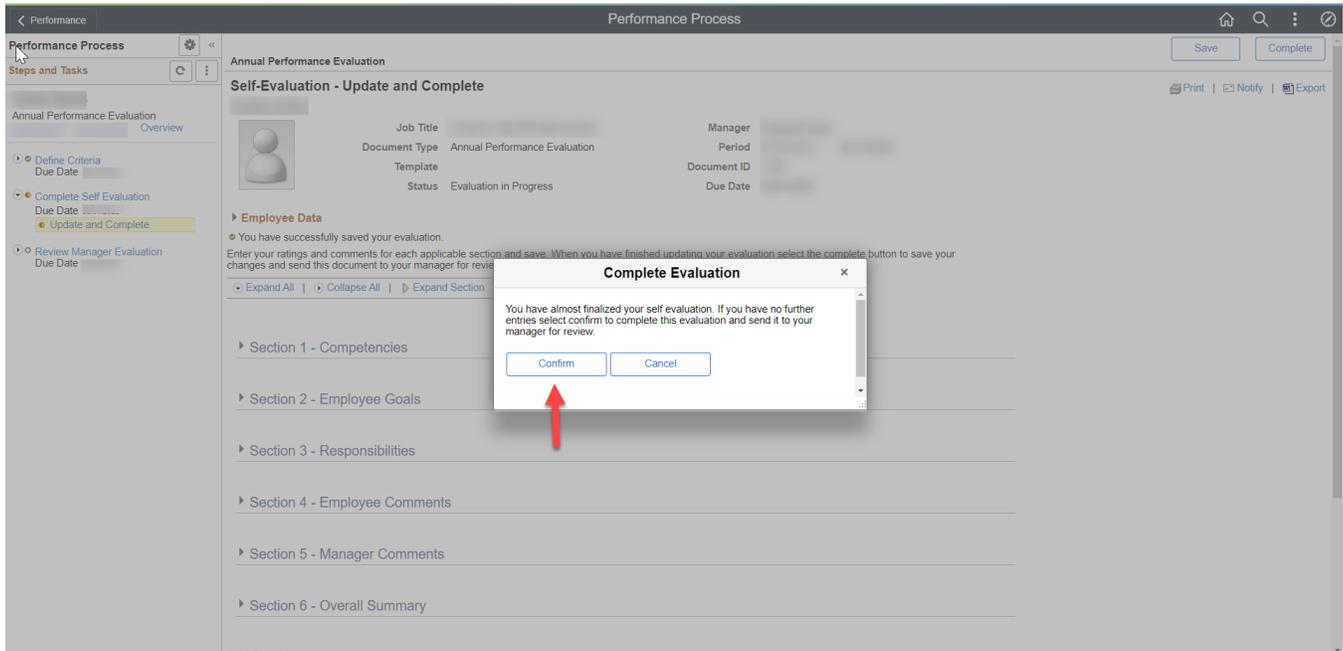
15. **You will see this confirmation page. If you wish to see what you just submitted, click "View" and your completed Self Evaluation will pop up in a new window.**
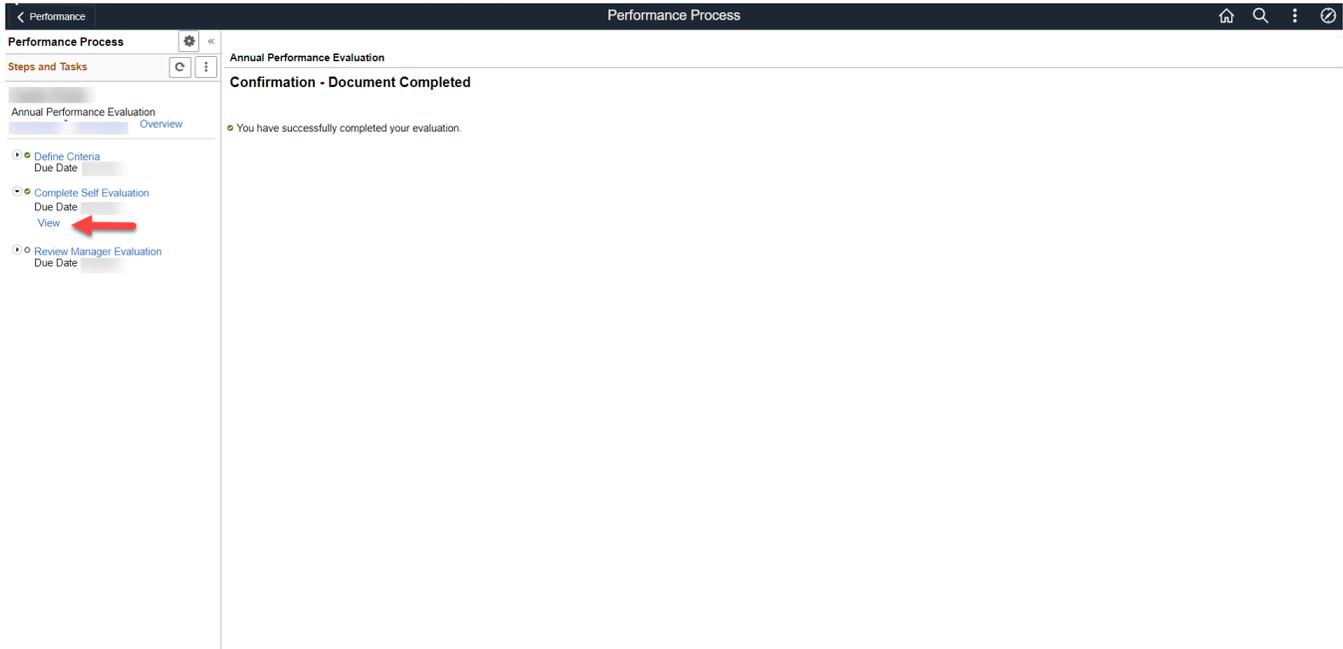
16. **After reviewing your evaluation with your manager, you will need to acknowledge the evaluation. In the evaluation, click "Review Manager Evaluation" then "Acknowledge" from the left-hand menu. Then click the "Acknowledge" button in the upper right-hand corner.**

17. A box will pop up, click "Confirm" to confirm.

18. You will see a confirmation page of your acknowledgement.

Performance Process

Steps and Tasks

Annual Performance Evaluation
   —   Overview

- Define Criteria
  Due Date
- Complete Self Evaluation
  Due Date
- Review Manager Evaluation
  Due Date
  - Review with Manager
  - Acknowledge
    View

Annual Performance Evaluation

Confirmation - Employee Acknowledgement

- You have successfully acknowledged this document.