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## Supervisor’s Guide to ePM

### Electronic Performance Management

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## **What is ePM?**

The electronic Performance Management (ePM) system is Texas Tech's automated performance information management system for all staff employees. ePM provides a single source for creating automated performance management documents, including position descriptions, employee self-assessments, and performance evaluations. ePM connects performance management data with the Banner database, automating several administrative processes such as updating evaluation scores in Banner and moving the final evaluations to Human Resources for automatic filing in the employee's record. Additionally, ePM allows the complete process to take place in a paperless environment, and provides staff employees and supervisors a means to review current and previous performance management documents that are stored in the employee's personnel record.

This guide assists those responsible for administering the performance management process and serves as a companion guide to the Supervisor's Guide to Position Descriptions and Performance Evaluations.

## **Accessing ePM**

ePM will be accessed by selecting the ePM link located under the Employee Resources tab at the top of the Human Resources web page at <http://www.depts.ttu.edu/hr/>. Employees may log in to ePM using their e-raider credentials.

## **ePM Main Page**

Logging in to ePM will bring staff employees and supervisors to the ePM main page. Staff employees who are not supervisors will have one tab on the main page titled *My PM Docs* (Fig 1 – page 4). Those who supervise staff employees will have three additional tabs titled *Position Description*, *Evaluations*, and *Proxy Maintenance* (Fig 2 – pag). Those assigned as Proxies will also have these three tabs.

## TAB FOR THE EMPLOYEE

### My PM Docs Tab

The My PM Docs tab displays three sections titled *My Position Descriptions*, *My Evaluations*, and the *Self-Assessment Section* (Fig 1 – page 3). Employees will use this tab to review and sign their current position descriptions and performance evaluations. Employees will also use this tab to create self-assessments. Once finalized, employees may return to this page at any time to review current and past performance management documents that were created in ePM.

Figure 1. – Employee Tab

The screenshot shows the 'My PM Docs' interface. It contains three main sections:

- My Position Descriptions:** A table with columns: Position Number, Title, Supervisor, Effective Date, Status, and Details. It lists two entries for position T94810 (Mascot) supervised by Todd Phillips, one with an effective date of 02/27/2015 (Final status) and another with 04/17/2014 (History status).
- My Evaluations:** A table with columns: Position Number, Title, Supervisor, Evaluation Date, Status, and Details. It lists three entries for position T94810 (Mascot) supervised by Todd Phillips, with evaluation dates of 04/06/2016 (Final), 04/11/2015 (History), and 05/26/2014 (History).
- Self-Assessment Section:** Includes filter checkboxes for 'In Progress', 'Completed', 'Waiting for Signature', and 'History'. Below is a table with columns: Last Name, First Name, Tech ID, Position, Department, Self-Assessment Date, Status, and Details. It shows two entries for 'Rider' (masked first name, Tech ID R00123456) in the 'Human Resources' department, with self-assessment dates of 08/17/2016 (In Progress) and 12/17/2015 (Complete).

### My Position Descriptions

When an employee begins work, or when a position description is modified, the supervisor will want to make sure the employee reviews his/her Position Description and signs it in ePM.

Selecting the **Details** button will open the associated form to allow the employee to review and sign the Position Description document. The employee will also be able to print the document by saving the document as a PDF, which can be accomplished by selecting the **Save to PDF** button at the top upper right corner of the document.

In addition, the employee may look to the *Status* column of this section to identify the current status of the document. Position Descriptions ready to be reviewed and signed by the employee will be in the “Waiting for Signature” status. When the document has been signed by both the supervisor and employee, the status will read “Final.”

## My Evaluations

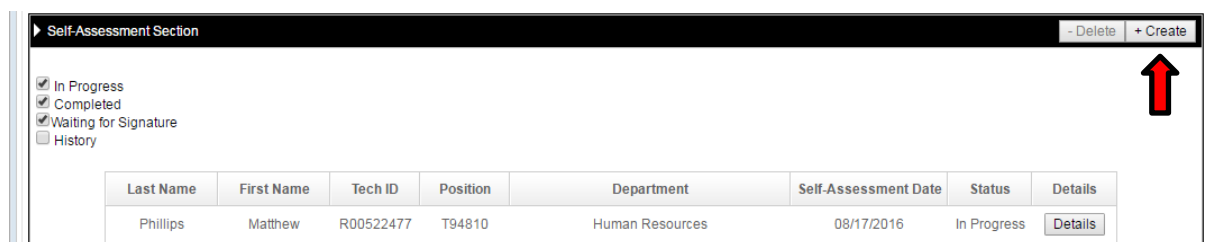
This section allows an employee to review and sign his/ her evaluations.

Selecting the **Details** button will open the associated form to allow the employee to review and sign the evaluation. The employee will also be able to print the document by saving the document as a PDF, which can be accomplished by selecting the **Save to PDF** button at the top upper right corner of the document.

In addition, the employee may look to the *Status* column of this section to identify the current status of the document. Evaluations ready to be reviewed and signed by the employee will be in the “Waiting for Signature” status. When the document has been signed by both the supervisor and employee, the status will read “Final.”

## Self-Assessment Section

Self-Assessments are created from each employee’s My PM Docs home page. Employees may create a new Self-Assessment by selecting the **Create** button at the top right side of the *Self-Assessment Section*. The status of a self-assessment is indicated in the *Details* column. Current and past self-assessments are visible in the lower portion of this section and will be shown as “In Progress” if the employee has started the assessment, but not yet submitted it to the supervisor. Self-assessments that have been submitted to the supervisor are shown as “Complete.” Employees may review past self-assessments by checking the *History* box located at the top left of this section.



Last Name	First Name	Tech ID	Position	Department	Self-Assessment Date	Status	Details
Phillips	Matthew	R00522477	T94810	Human Resources	08/17/2016	In Progress	<a href="#">Details</a>

The self-assessment form will open. Employees should answer each question.

Self-Assessment Detail

Name: Matthew Phillips	Tech ID (R-number): R00522477
Position: T94810	Date of Hire: 04/09/2012
Department: Human Resources	Date of Self Assessment: 09/09/2016

In your opinion, how would you evaluate yourself on the essential functions of your job?

Employees may save their work to review and edit at a later time by selecting **Save**. Selecting the **Complete** button will finalize the assessment, and it will automatically appear on the supervisor's evaluation dashboard.

What goals have you set for yourself for next year? Think both professional and departmental.

Note: When Self-Assessment completed click Complete button. To save and edit later click Save button.

**Save** **Complete** **Save PDF** **Close**

## TABS FOR SUPERVISORS

Supervisors and their proxies will have three additional tabs—*Position Description*, *Evaluations* and *Proxy Maintenance*. These tabs are used to create and revise position descriptions, review self-assessments, and complete performance evaluations for the employees whom they directly supervise.

Figure 2. – Supervisor / Proxy Tabs

The screenshot shows a web interface with four tabs: 'My PM Docs', 'Position Description', 'Evaluations', and 'Proxy Maintenance'. The 'Position Description' tab is active. Below the tabs, there are two sections: 'My Position Descriptions' and 'My Evaluations'. Each section contains a table with columns for Position Number, Title, Supervisor, Effective/Evaluation Date, Status, and Details.

Position Number	Title	Supervisor	Effective Date	Status	Details
T99282	Section Manager	Matthew Phillips	09/09/2016	Final	<a href="#">Details</a>
T99282	Section Manager	Matthew Phillips	06/12/2015	History	<a href="#">Details</a>

Position Number	Title	Supervisor	Evaluation Date	Status	Details
T99282	Section Manager	Matthew Phillips	09/09/2016	Final	<a href="#">Details</a>

### Position Description (PD) Tab

To create or review a position description, select the Position Description tab.

The screenshot shows the same web interface as Figure 2, but with a red arrow pointing to the 'Position Description' tab. The 'Position Description' tab is now active, and the 'My Position Descriptions' section is expanded to show a table with columns for Position Number, Title, Supervisor, Effective Date, Status, and Details.

Position Number	Title	Supervisor	Effective Date	Status	Details
T99282	Sr Analyst	Matthew Phillips	02/28/2014	Final	<a href="#">Details</a>
T99282	Sr Analyst	Matthew Phillips	02/23/2014	History	<a href="#">Details</a>

Once the Position Description Tab is open, a page will open and display three sections titled Employee Position Description (EPD), Vacant Position Description (VPD), and PD Reviews. To create a new EPD or update an existing EPD, Select the **Create** button.

The screenshot shows the 'Position Description' tab selected. The 'Proxy for:' dropdown is set to 'Matthew Phillips - Supervisor'. The interface is divided into three main sections:

- Employee Position Description (EPD):** Features a search bar, a list of checkboxes for status (In Progress, Submitted for Review, Submitted for Final, Waiting for Signature, Final, History, Previous Supervisors' Documents), and a table with columns: R#, Last Name, First Name, Position Number, Title, Supervisor, Status, Date Created, Details, and Vacate. A red arrow points to the '+ Create' button in the top right of this section.
- Vacant Position Description (VPD):** Features a search bar and a table with columns: Position Number, Position Class, Title, Owner, Date Created, and Details.
- PD Reviews:** Features a table with columns: R#, Last Name, First Name, Position Number, Title, Supervisor, Review Level, and Details.

After the New Position Description menu appears, select either New, Update, or Clone from the PD Template drop down menu. Selecting Clone allows use of a previously created position description to be assigned to a different employee. This is helpful when many employees perform the same job.

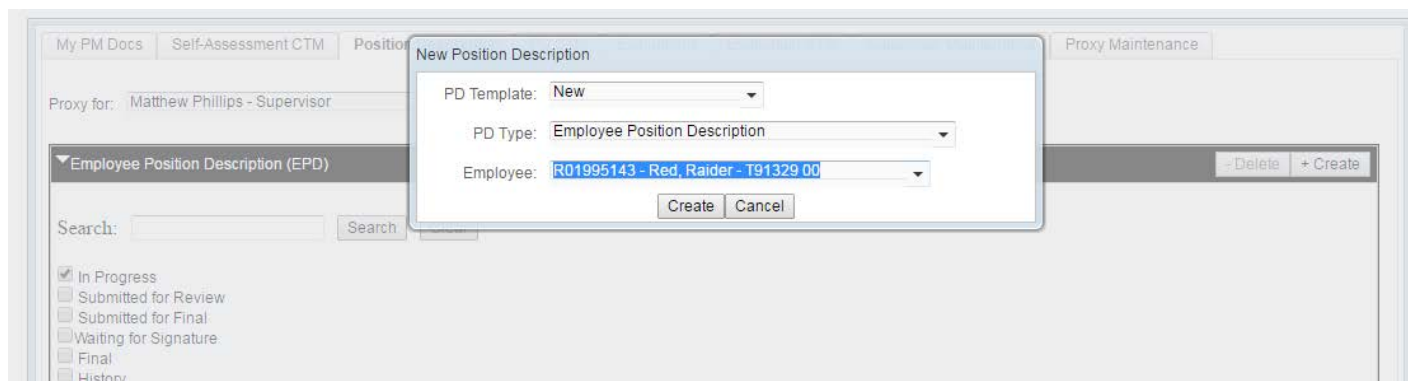
The 'New Position Description' dialog box is open, showing the following fields:

- PD Template:** A dropdown menu currently set to 'New'.
- PD Type:** An empty dropdown menu.
- Buttons:** 'Create' and 'Cancel' buttons are located at the bottom of the dialog.

Next, make a selection from the PD Type drop down menu. Choosing the Employee Position Description option will open another drop down menu displaying a list of employees assigned in Banner to their respective supervisor. If an employee's name does not appear, then the supervisor must be updated using the Supervisor Maintenance tab (refer to page 25). Only Organization Managers and their proxies have access to the Supervisor Maintenance Tab. Choosing the Vacant Position Description with Position



Number option will activate another drop down menu of position numbers. Choosing the Vacant Position Description without Position Number option will open a box where you will enter the Position Class for the PD you wish to create.



After selecting an employee, select **Create**. The PD form will now open and you are ready to build the PD. There is a progress chart at the top of the screen that indicates your progress as Not Started, Incomplete, or Complete. As you are completing each section, if a required section is left blank, an error message will appear and that section will not be able to be marked complete.



### **Employee Information Section**

The Employee Information section will be pre-populated with data from Banner. If any of this data is incorrect, delete the EPD and contact your Employee Service representative or Human Resources to have this data corrected. In this section, you must identify the employee's Security Level and whether or not the position is supervisory. Selecting Yes in the supervisory section will open up other information fields on the PD and the performance evaluation forms.

Once selections are made, select the **Mark Complete** button. This will lock the section and you can no longer make edits. The progress chart will indicate that the section is Complete. To edit any section previously completed, select the **Mark Incomplete** button at the top right of the section. This will unlock the section and changes can be made. Changes made to a section may be saved at any time by selecting the **Save** button.

**Employee Information** Mark Complete

R#: R01995143    Last Name: Red    First Name: Raider    Middle Initial:

Chart: T    Org Code: H15000    Organization: Human Resources

Position Class: S0614    Position #: T91329    Suffix #: 00

Title: Director    Extended Title: Director

Security Sensitive  ←    Supervisor: No  ←

Level:  Save →

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**Reports To:**

R#: R00522477    Last Name: Phillips    First Name: Matthew    Middle Initial: T

Title: Associate Managing Director

### Work Hours Section

In the Work Hours section, verify the Hours/Shift information, which is prepopulated with Texas Tech’s standard hours. Change the information if necessary. Using the drop down arrows, indicate whether the employee is required to work overtime and whether travel is required.

**Work Hours** Mark Complete

Hours/Shift:	From:	To:
<input checked="" type="checkbox"/> Monday	8:00 AM	5:00 PM
<input checked="" type="checkbox"/> Tuesday	8:00 AM	5:00 PM
<input checked="" type="checkbox"/> Wednesday	8:00 AM	5:00 PM
<input checked="" type="checkbox"/> Thursday	8:00 AM	5:00 PM
<input checked="" type="checkbox"/> Friday	8:00 AM	5:00 PM
<input type="checkbox"/> Saturday		
<input type="checkbox"/> Sunday		

Is overtime required?: Yes  ←  
Specify:

---

Is travel required?: Yes   
Specify: Yes  No

Other:   
Specify:

Save

### Job Summary Section

The Job Summary section will prepopulate with the appropriate Pay Plan data. No action is needed in this section. The prepopulated data comes from the Pay Plan and is associated with the position classification.

### Essential Job Function Section

Enter each essential job function in the Function Description box. **Enter only one essential job function per box.** Select the Create button to add additional essential job functions. A blank box will open for each function and will display only two at a time. As you are entering essential functions, you can track the total number of essential functions at the bottom right corner of the Function Description box. You may also choose to add a weight to each job function to identify which are most important. These weights will carry over to the performance evaluation and the score will be weighted accordingly. A calculator at the bottom right of the section identifies total assigned weight, which must equal 100% to

mark the section complete. If you are using weights, you must assign a weight to each function. Otherwise, leaving the weight section blank will distribute the score evenly across all job functions. After entering every essential job function, select **Mark Complete**.

To delete a function, using your mouse, hover inside the “Weight” column and select. You may have to type something in the Function Description box for this to register. This will highlight the row and release the **Delete** button. Select **Delete**.

Job Summary Complete Mark Incomplete

Position description from Texas Tech Pay Plan.

Directs, plans, coordinates and supervises the operation and activities of a specialized unit or small department; develops and implements policies and procedures, administers the budget, organizes tasks and sets priorities. Serves as liaison with university personnel and community at large. Works under general supervision with broad latitude for initiative and independent judgment.

Essential Job Functions Mark Complete

A job function is essential if removal of that function would fundamentally change the job. Things to consider when determining functions that are essential: Does the job exist to perform that function? Can the function only be performed by a limited number of employees? Does the employee spend a significant amount of time performing this function? If you answered yes, then it is likely to be considered an essential function. If failure to perform a function has adverse affects, it is also likely to be an essential function.

Save

Function Description	Weight
	%

- Delete + Create

Total Weight: 0.00%

Mark Complete

Move Job Function Up Move Job Function Down Save

### Level of Supervision Received

Choose the appropriate level of supervision for the employee and select **Mark Complete**.

Level of Supervision Received Mark Complete

Describe the amount of supervision this position receives.

Extensive - Much direct supervision, work with supervisor  
Moderate - Access to supervisor and/or lead coworker, when needed  
Limited - Work is highly autonomous, performs independently

Save

## Qualifications Section

Enter information into each box and select the **Mark Complete** button. In the Required Qualifications box, information from the Texas Tech Pay Plan will be prepopulated. **Do not** edit or delete this description.

Qualifications Mark Complete

Supervising Subordinates:

*Describe the amount of time and type of supervision given to subordinates. List number and title of employees supervised.*

⚠ This field may not be empty or contain only spaces. ✕

Save

## Work Content Section

Select the appropriate radio button for each section and select **Mark Complete**.

Work Context Mark Complete

*How important are the following skills and abilities in accomplishing the essential job functions?*

Public Speaking:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Face-to-Face Communication:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Telephone Communication:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Write Letters, Emails, and Memos:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Develop and Implement Policies and Procedures:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Meet Strict Deadlines:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Responsibility for Outcomes and Results:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Develop Objectives and Strategies, Strategic Planning:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Evaluate Information to Determine Compliance:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Deductive Reasoning, Make Decisions and Solve Problems:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Manage Processes, Resources, and People:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Coordinate or Lead Projects and Teams:  Not Important  Fairly Important  Important  Very Important  Extremely Important

Save

## Work Content Section Continued

Physical Demands Mark Complete

*In an average workday, employee is required to:*

**Physical Demands**

*In an average workday, employee is required to:*

Approximate Amount of Time per Day (in hours)

Sit:  0 - 2  2 - 4  4 - 6  6+  N/A

Stand:  0 - 2  2 - 4  4 - 6  6+  N/A

Walk or Move About:  0 - 2  2 - 4  4 - 6  6+  N/A

Save

**Dexterity Requirements**

Employee must use hands and wrist motion for repetitive action such as:

Simple Grasping:  Right  Left  Both  Neither

Firm Grasping:  Right  Left  Both  Neither

Fine Manipulation:  Right  Left  Both  Neither

Picking or Pinching:  Right  Left  Both  Neither

**Environmental Conditions**

Approximate Amount of Time per Day (in hours)

Stand on concrete:  0 - 2  2 - 4  4 - 6  6+  N/A

Walk on uneven or slippery surface:  0 - 2  2 - 4  4 - 6  6+  N/A

Exposure to electrical hazards:  0 - 2  2 - 4  4 - 6  6+  N/A

Exposure to dust, smoke, fumes, odors, grease, oil:  0 - 2  2 - 4  4 - 6  6+  N/A

Exposure to distracting or unpleasant noise or sounds:  0 - 2  2 - 4  4 - 6  6+  N/A

**Sensory Demands**

Hearing:  Yes  No

Speech:  Yes  No

Taste:  Yes  No

Touch:  Yes  No


## Organization Chart Upload

Use this section to attach an optional Organizational Chart. It is recommended that the chart contain position titles, rather than specific names. Files must be one of the identified formats.

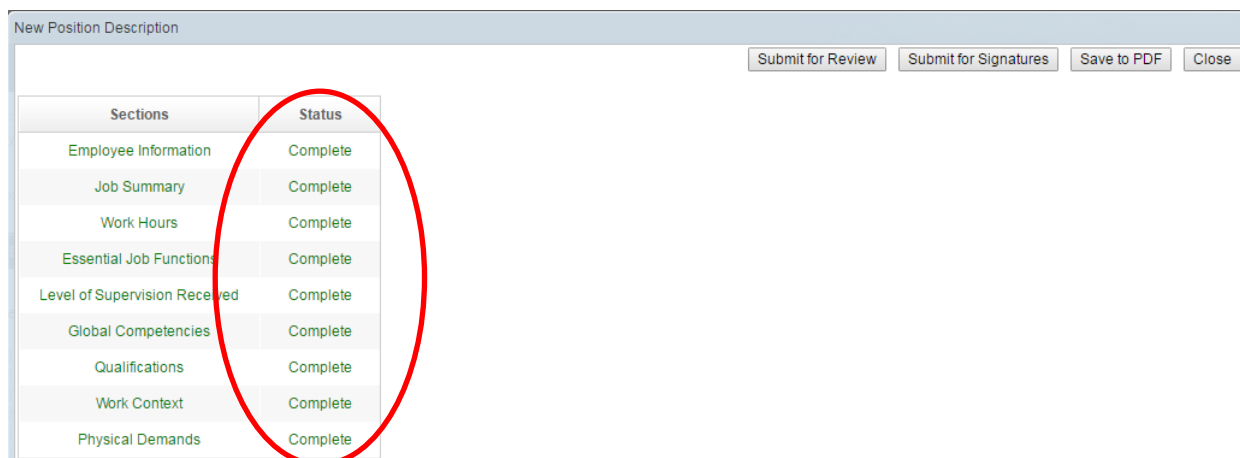
**Organization Chart Upload** - Delete + Create

Valid file extensions for upload are: .doc, .xls, .txt, .pdf, .csv, .xml, .rtf, .docx, .xlsx.

PD Attachments	Upload Date	Open
Talent Management Org Chart.pdf	9/8/16 3:57:11 PM	<input type="button" value="Open"/>

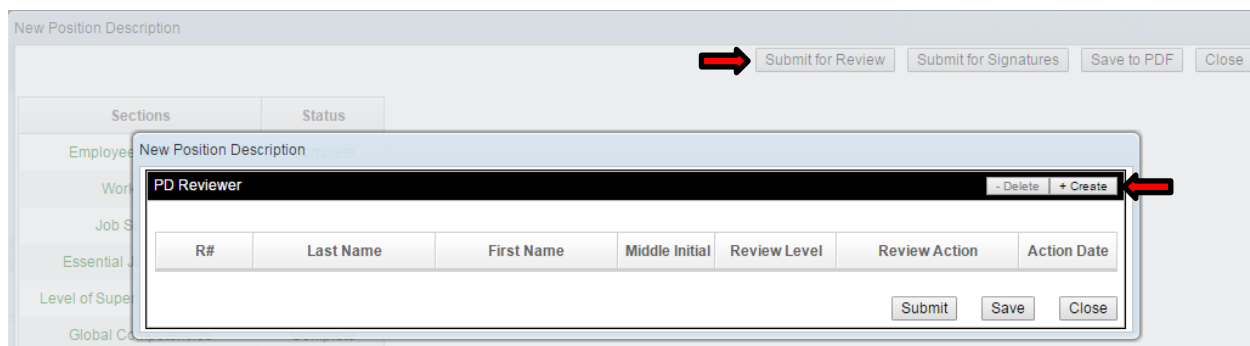


Once the entire EPD is completed, scroll back to the top and ensure all sections are identified as Complete.

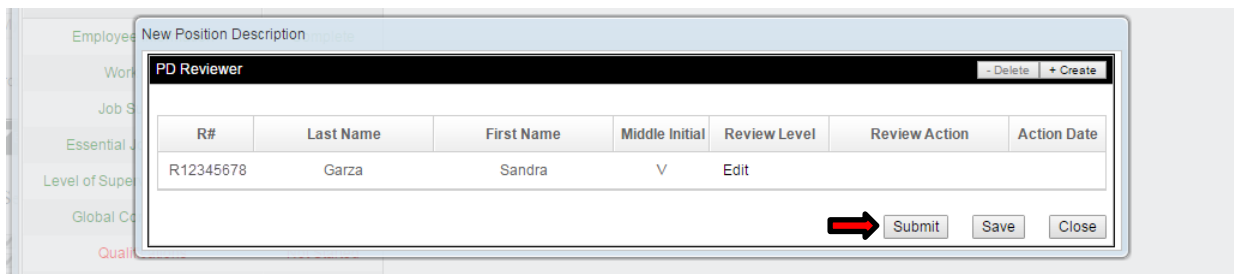


### Submitting the Position Description for Review

Prior to finalizing the position description, you have the option of sending the position description for review to one or more reviewers; e.g. next level supervisor or another administrator. To send the PD to another administrator for review, select the **Submit for Review** button, and then select **Create**.



Another menu will appear and allow you to search reviewers by their R-number, Last, or First Name. Make a selection and then enter the R-number or name for which you are searching. Choose the name of the Reviewer from the list that appears, select the level of review allowed (i.e., Read Only or Edit). Select the **Add Reviewer** button. Next, select the **Submit** button. The reviewer will receive an email indicating that there is a position description available for review. At this point, do not proceed with processing the position description. Wait for the reviewer's response.

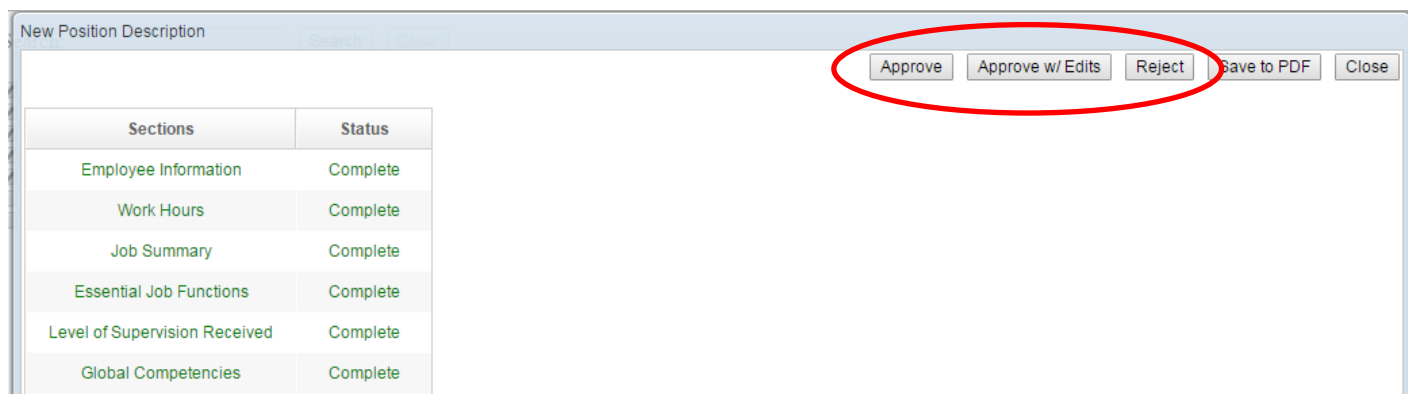


The reviewer will receive an email from [ePM@ttu.edu](mailto:ePM@ttu.edu) when a position description is ready to be reviewed. To access the position description, the reviewer will select the Position Description tab, scroll down to the PD reviews section, and select the **Details** button to open the position description.



R#	Last Name	First Name	Position Number	Title	Supervisor	Review Level	Details
R01995143	Red	Raider	T91329	Director	Matthew Phillips	Edit	<b>Details</b>

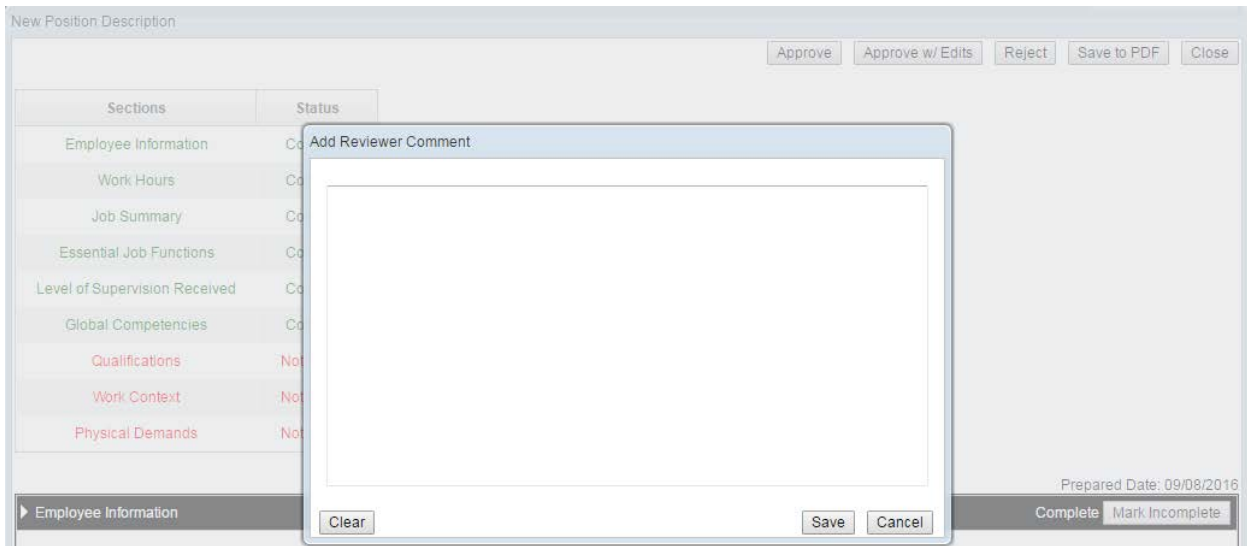
If the Reviewer has editing privileges, the Reviewer has the option to select the **Mark Incomplete** button on any section in order to make changes or simply make comments by selecting the **Approve w/ Edits** or **Reject** buttons. If the Reviewer has no comments, the Reviewer selects **Approve**. Once the position description has been approved, the position description will no longer appear on the Reviewer's Position Description page and is ready to be finalized by the supervisor.



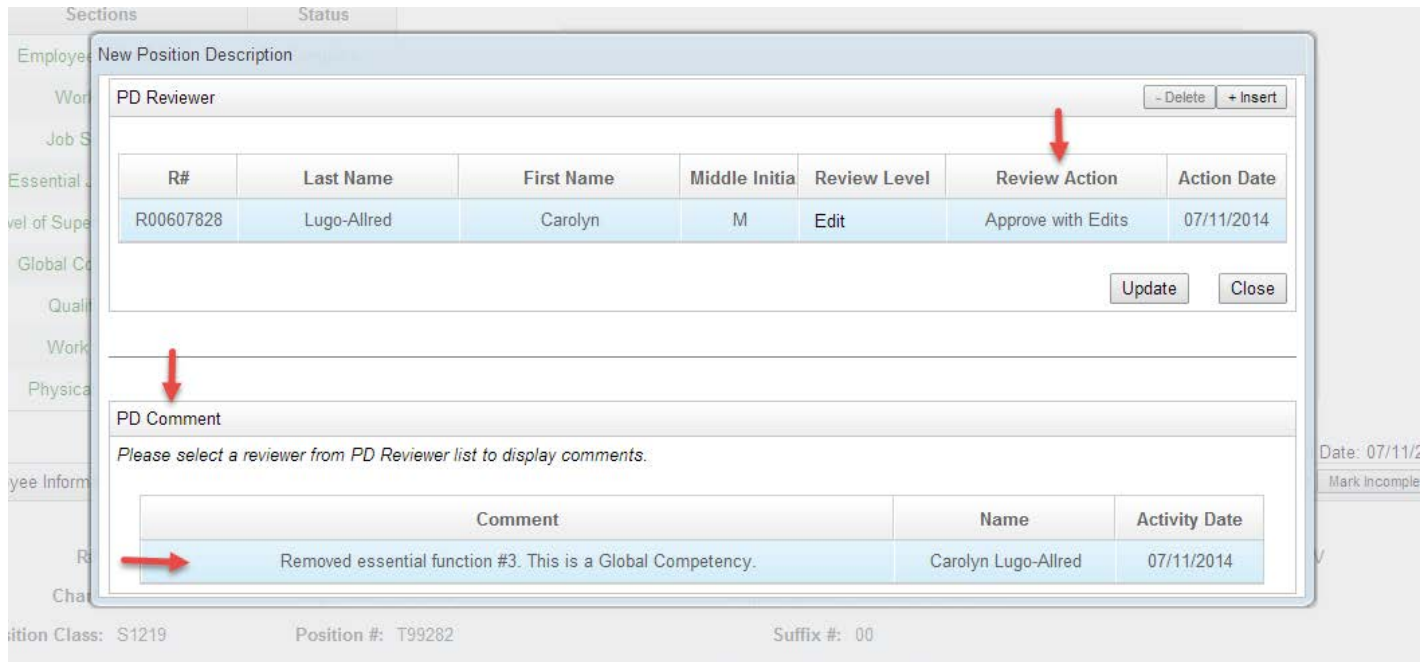
Sections	Status
Employee Information	Complete
Work Hours	Complete
Job Summary	Complete
Essential Job Functions	Complete
Level of Supervision Received	Complete
Global Competencies	Complete

Please note that once the Reviewer approves the position description, the supervisor will receive an email notification from [ePM@ttu.edu](mailto:ePM@ttu.edu). If the approval was made with no edits, the position description will remain in a "Submitted for Review" status. Refer to the email from ePM to confirm that the approval from the Reviewer has occurred and that the position description is ready to be signed by the supervisor.

If rejecting the position description, the reviewer will select the **Reject** button and a comment box will appear. The reviewer should provide reason(s) for rejection and select the **Save** button when done. If approving the position description with edits, the reviewer should select the **Approve w/ Edits** button, list the edits he/she made to the position description in the comment window, and select the **Save** button.



After the reviewer has approved or rejected the PD, the supervisor will receive an email notification from [ePM@ttu.edu](mailto:ePM@ttu.edu). PDs that have been approved with comments or rejected by the reviewer can be edited as needed. To view comments, select the **Details** button; select the **Submit for Review** button; select the name of the reviewer to highlight the entire row. If the reviewer has submitted comments, a dialogue box with the comments will appear.






## Signing the Position Description

You may skip the review process and send the PD directly to the employee for review and signature. In order to start this process, the supervisor must always sign the PD first. To sign the PD, simply select the **Submit for Signatures** button, scroll to the bottom of the form and check the box next to the Signature of Supervisor box. The Signature Confirmation message will appear; select the **Sign** button.

New Position Description

Submit for Review   **Submit for Signatures**   Save to PDF   Close

Sections	Status
Employee Information	Complete
Work Hours	Complete
Job Summary	Complete




**Acknowledgments**

*The above position description is intended to describe the general nature and level of work being performed. It is not intended to be construed as an exhaustive list of all responsibilities, duties, skills for the position. Nothing in this position description restricts management's right to assign or reassign duties and responsibilities at any time.*

Signature of Employee:                      Date:

Signature of Supervisor:                      Date:



conditions:


**Signature Confirmation**

I certify that this position description has been reviewed by myself and my employee and is ready for electronic signature and submission to the employee's file.

*Matthew Phillips*

You are required to affirm that the account you are currently signed into is your own and that this affirmation equates to a digital signature. The eRaider sign in that is required to access this application serves as your digital signature for affirmation purposes. This signature guideline is in compliance with the UETA Guidelines for the Management of Electronic Transactions and Signed Records.

Sign    Cancel



Scroll back to the top of the page and select the **Close** button. This will send the PD to the employee's ePM page along with an e-mail from [ePM@ttu.edu](mailto:ePM@ttu.edu) telling them that their PD has been completed and is ready for signature. Once the employee has signed the PD, it will automatically be sent to HR and filed with the employee's electronic personnel records. Additionally, supervisors will receive an email from [ePM@ttu.edu](mailto:ePM@ttu.edu) notifying them when employees have signed their PDs. Signatures for a completed PD will appear as follows:

**Acknowledgments**

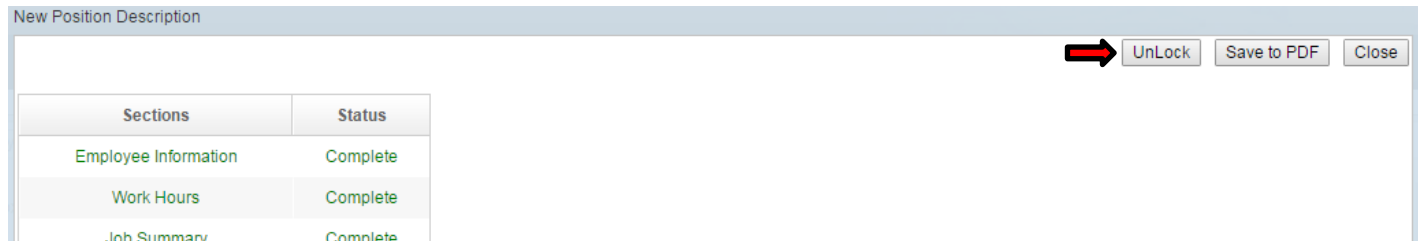
*The above position description is intended to describe the general nature and level of work being performed. It is not intended to be construed as an exhaustive list of all responsibilities, duties, skills for the position. Nothing in this position description restricts management's right to assign or reassign duties and responsibilities at any time.*

Signature of Employee: *Raider Red*                      Date: 03/14/2014

Signature of Supervisor: *Matthew Phillips*                      Date: 03/14/2014

## Unlocking the Position Description

Once a PD has been submitted for signature it is locked down and may no longer be edited. The PD may be unlocked to allow edits any time prior to the employee signing it. To unlock a PD, locate and select the **Unlock** button at the top of the form. Unlocking a PD will return it to an In Progress status and the Submit for Review and Submit for Signature buttons will appear at the top of the form.

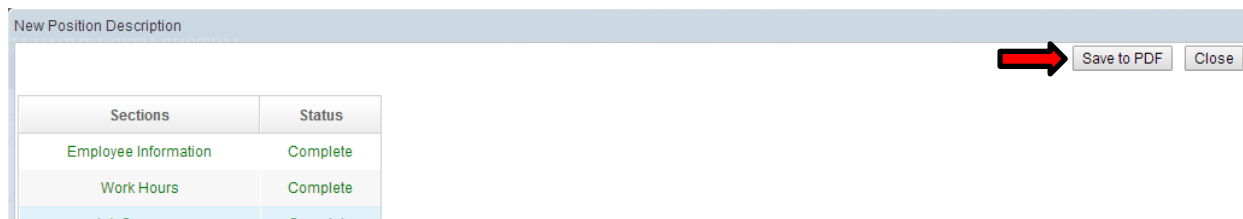


The screenshot shows a web interface titled "New Position Description". At the top right, there are three buttons: "UnLock", "Save to PDF", and "Close". A red arrow points to the "UnLock" button. Below the buttons is a table with two columns: "Sections" and "Status".

Sections	Status
Employee Information	Complete
Work Hours	Complete
Job Summary	Complete

## Viewing a Position Description

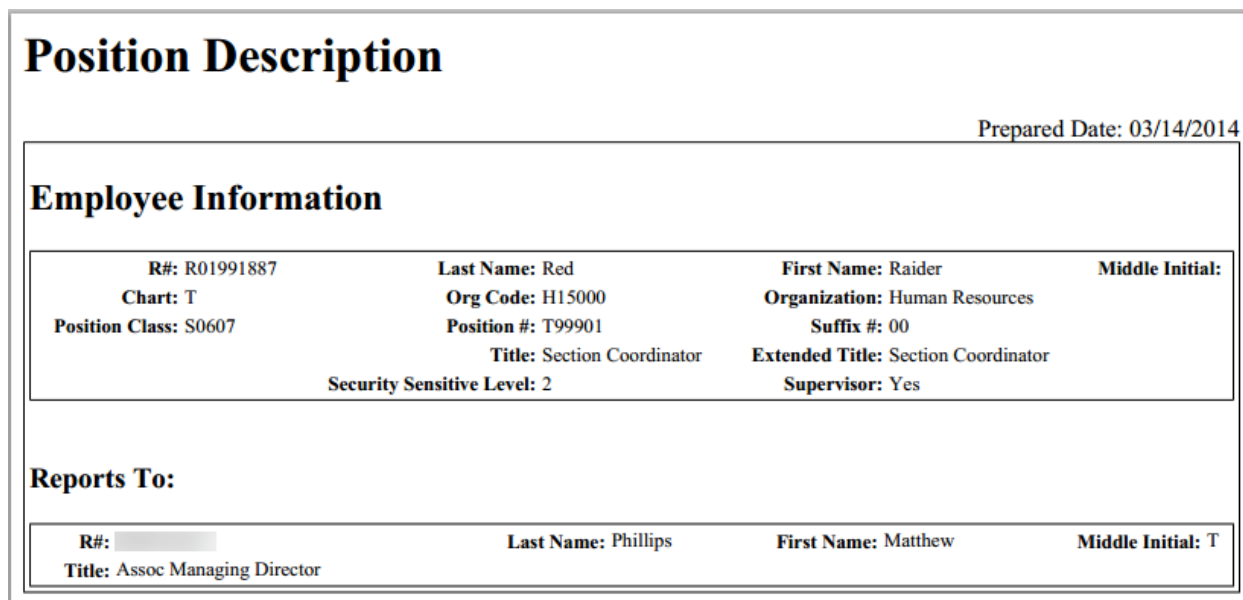
Position descriptions may be viewed at any time by selecting the **Details** button next to the respective PD. Position descriptions may be saved as a PDF for viewing offline or printing.



The screenshot shows the same "New Position Description" interface. A red arrow points to the "Save to PDF" button. The table below the buttons is identical to the previous screenshot.

Sections	Status
Employee Information	Complete
Work Hours	Complete
Job Summary	Complete

The PDF appears in a printer friendly, easy to read format.



The screenshot shows a printer-friendly view of a Position Description. The title "Position Description" is at the top left, and "Prepared Date: 03/14/2014" is at the top right. Below the title is a section titled "Employee Information" containing a table of details. Below that is a section titled "Reports To:" containing another table of details.

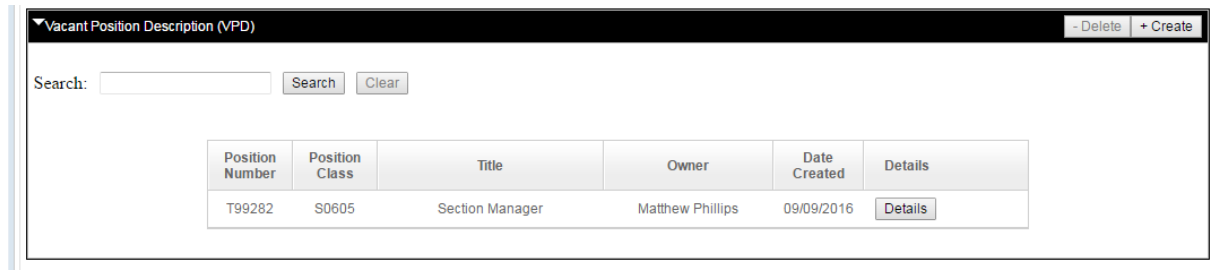
Employee Information			
<b>R#:</b> R01991887	<b>Last Name:</b> Red	<b>First Name:</b> Raider	<b>Middle Initial:</b>
<b>Chart:</b> T	<b>Org Code:</b> H15000	<b>Organization:</b> Human Resources	
<b>Position Class:</b> S0607	<b>Position #:</b> T99901	<b>Suffix #:</b> 00	
	<b>Title:</b> Section Coordinator	<b>Extended Title:</b> Section Coordinator	
	<b>Security Sensitive Level:</b> 2	<b>Supervisor:</b> Yes	

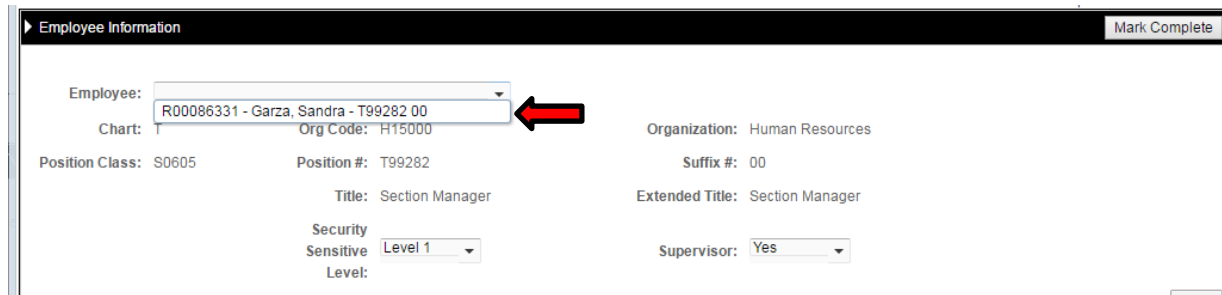
Reports To:			
<b>R#:</b> [REDACTED]	<b>Last Name:</b> Phillips	<b>First Name:</b> Matthew	<b>Middle Initial:</b> T
<b>Title:</b> Assoc Managing Director			

## Vacating a Position Description

When an employee terminates employment with the University, the supervisor should vacate the position description prior to assigning a new employee to the position. This is done by selecting the Vacate button next to the desired PD. This will remove the name associated with the PD, and move the PD from the EPD section to the Vacant Position Description Section. Selecting the Details button next to a VPD will open the VPD and allow the supervisor to select an employee to be associated with the VPD, make updates to the PD, sign the PD, and send it to the employee and HR. Once completed, the PD will move back to the EPD section.



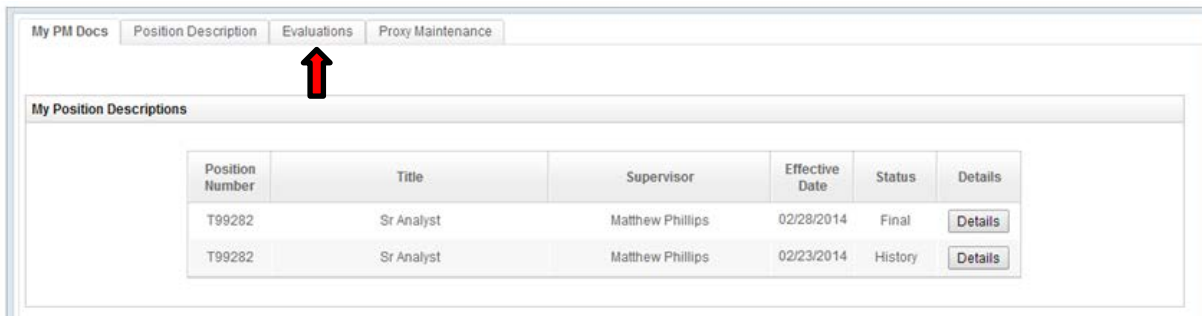
Position Number	Position Class	Title	Owner	Date Created	Details
T99282	S0605	Section Manager	Matthew Phillips	09/09/2016	Details



Employee: R00086331 - Garza, Sandra - T99282 00  
Chart: H15000  
Organization: Human Resources  
Position Class: S0605  
Position #: T99282  
Title: Section Manager  
Security Sensitive Level: Level 1  
Supervisor: Yes

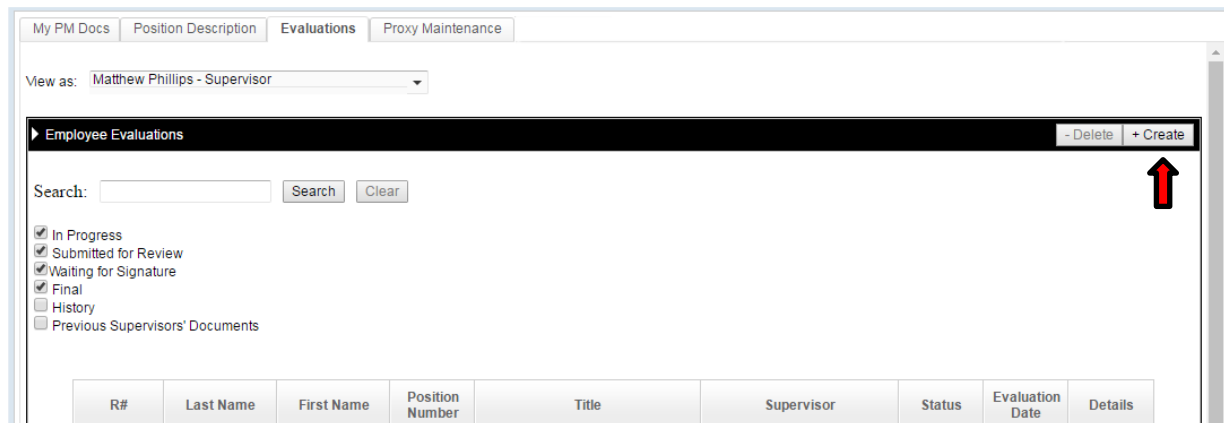
## Staff Performance Evaluations

To create or review a performance evaluation (PE), select the Evaluations Tab.

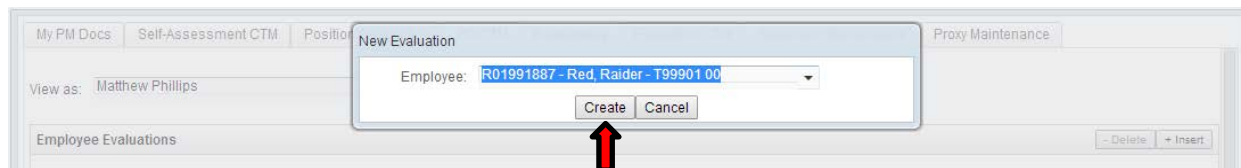


Position Number	Title	Supervisor	Effective Date	Status	Details
T99282	Sr Analyst	Matthew Phillips	02/28/2014	Final	Details
T99282	Sr Analyst	Matthew Phillips	02/23/2014	History	Details

Once the Evaluations tab is open, the page will display four sections titled Employee Evaluations, Employee Self-Assessments, Next Level Supervisors - Evaluations Waiting Signature, and Evaluation Reviews. To create a new evaluation, select the **Create** button.



The New Evaluation menu will appear with a drop down list of employees. **Only those employees with a completed, signed position description will appear.** If an employee name does not appear, check the Employee Evaluations dashboard to determine if the employee has an evaluation listed in the In Progress status. If an In Progress evaluation does not appear in the dashboard, you will need to go back and ensure they have fully executed position description in the ePM system. If an employee has changed positions or departments, the employee will need to have a finalized PD with the new position and/or department in order for his/her name to appear in the drop down menu. Select the employee to be evaluated and then select the **Create** button.



The employee evaluation application will open, displaying a progress status chart much like that of the Position Description section. The Employee Information section will be prepopulated based on data in Banner and the EPD. Select the Evaluation Type, i.e. 3 month, 6 month, Annual, or Other. Don't forget to mark sections complete as you go, or save any changes prior to exiting the form.

The screenshot shows the 'New Evaluation' form. At the top right, there are buttons for 'Submit for Review', 'Submit for Signatures', 'Print to PDF', and 'Close'. Below these is a table with the following data:

Sections	Status
Employee Information	Not Started
Essential Job Functions	Not Started
Global Competencies	Not Started
Development and Goals	Not Started
Performance Improvement Plan	Not Started

Below the table is the 'Employee Information' section, which is prepopulated with the following data:

Name: Raider Red      Tech ID (R-Number): R12345678  
 Department: Human Resources      Title: Analyst II  
 Supervisor: Sandra Garza      Overall Evaluation Rating: 0.00  
 Supervisor Tech ID: R01234567  
 Date of Evaluation: 09/26/2016      Evaluation Type: Annual  
 Date Submitted:      Current Hire Date: 03/11/2013

There are red arrows pointing to the 'Global Competencies' row in the table and the 'Annual' dropdown menu in the 'Evaluation Type' field.

### Essential Job Functions

The Essential Job functions will automatically pull over the information from the employee's position description. Rate each function by selecting the appropriate radio button and provide comments that support the rating. Select the **Complete** button after completing each section. If any required information is missing, an error message will display. **Essential job functions that have been assigned specific weights on the EPD will be calculated as a zero rating if NA is marked; this will negatively affect the overall score.** Rather than marking NA for essential job functions that were assigned specific weights, supervisors are advised to rate a 4 on performance level. When selecting NA the supervisor must specify the reason for marking NA in the comments section (e.g. *I have not yet provided you the training necessary to complete this task. However, you will be expected to perform this function on your next evaluation, and will be rated based on your performance*).

The screenshot shows the 'Essential Job Functions' section. At the top right, it displays 'Rating: 0.00' and a 'Mark Complete' button. Below this is a 'Save' button. The section is titled 'Essential Job Functions - 40% of Overall score' and includes the text 'as identified on current Position Description'. The main content area is divided into two columns: 'Job Function' and 'Performance Level'. The 'Job Function' column contains the following text: '1. Partner with campus leaders, managers, and supervisors to provide forward-looking solutions and actively assist in achieving departmental goals as they relate to employee education and development. (20.00%)'. The 'Performance Level' column contains radio buttons for 'NA', '1', '2', '3', '4', '5', '6', and '7'. There is a red arrow pointing to the 'NA' radio button. Below the 'Job Function' column is a 'Comments:' field with a red arrow pointing to it.

The Supervisory Factors section only appears if the position is identified as supervisory on the EPD. Rate, comment, and mark complete.

Supervisory Factors - 40% of Overall score Rating: 0.00 [Mark Complete](#)

*supervisory positions as determined by the Position Description*

**1. Leadership Ability and Coaching**  NA  1  2  3  4  5  6  7

*The ability to organize and influence a diverse group of people to achieve a common goal, communicate clear expectations, provide feedback, recognize effort, and celebrate success.*

Comments:

### Global Competencies

Global Competencies are the same for all employees. Rate, comment, and mark complete.

Global Competencies - 20% of Overall score Rating: 0.00 [Mark Complete](#)

[Save](#)

**1. Quality of Customer Service/Relationship with Others/Communication (oral and written)**  1  2  3  4  5  6  7

*Respectful, cooperative, and effective in getting along with a diverse group of employees and customers. Expresses ideas/information in a complete, clear, concise, organized, and timely manner. Actively listens to others and is open to suggestions.*

Comments:

### Development and Goals

Provide developmental comments and goals for the upcoming year / evaluation period. This section is not scored, but must be completed in order to finalize the evaluation.

Development and Goals [Mark Complete](#)

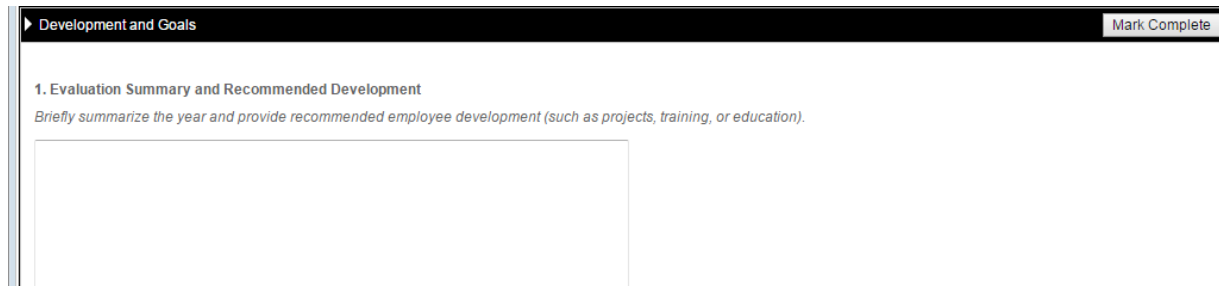
**1. Evaluation Summary and Recommended Development**

*Briefly summarize the year and provide recommended employee development (such as projects, training, or education).*

## Performance Improvement Plan

The Performance Improvement Plan section (consisting of 3 fields) will only appear if the overall evaluation score is under a 4.0 (Meets Expectations). In this case, supervisors use this section to identify expectations for improvement, provide an action plan, and list the follow-up plan timeline.

For employees in non-supervisory positions, the total rating for essential job functions is worth 80% of the overall rating, and global competencies are worth 20% of the overall rating. For employees in supervisory positions, the total rating for essential job functions is worth 40% of the overall rating, supervisory factors are worth 40% of the overall rating, and global competencies are worth 20% of the overall rating.



The screenshot shows a web interface for an evaluation form. At the top, there is a header bar with a dropdown arrow and the text 'Development and Goals' on the left, and a 'Mark Complete' button on the right. Below the header, the section is titled '1. Evaluation Summary and Recommended Development'. Underneath this title is a prompt: 'Briefly summarize the year and provide recommended employee development (such as projects, training, or education)'. Below the prompt is a large, empty rectangular text input area.

## Submitting the Evaluation for Review

Once a draft employee evaluation has been completed, the Evaluator can route the evaluation for review to the next level supervisor or other administrators. It will be routed for review in the same manner as the position description.



The screenshot shows a web interface titled 'New Evaluation'. At the top right, there are four buttons: 'Submit for Review', 'Submit for Signatures', 'Print to PDF', and 'Close'. A red arrow points to the 'Submit for Review' button. Below the buttons is a table with two columns: 'Sections' and 'Status'. The table lists five sections, all of which are marked as 'Complete'.

Sections	Status
Employee Information	Complete
Essential Job Functions	Complete
Supervisory Factors	Complete
Global Competencies	Complete
Development and Goals	Complete

When an evaluation has been submitted for review, the status on the main menu will change to show as Submitted for Review.

Employee Evaluations - Delete + Create

Search:  Search Clear

In Progress  
 Submitted for Review  
 Waiting for Signature  
 Final  
 History  
 Previous Supervisors' Documents

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Evaluation Date	Details
R01995143	Red	Raider	T91329	Director	Matthew Phillips	Submitted for Review		Details

The Reviewer will be able to access evaluations in the Evaluation Reviews section on their ePM Evaluations tab. To access an evaluation, the Reviewer selects the **Details** button.

Evaluation Reviews

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Evaluation Date	Details
R01995143	Red	Raider	T91329	Director	Matthew Phillips	Submitted for Review		Details

The Reviewer has the option to approve or reject the evaluation. If rejecting the evaluation, the Reviewer will select the **Reject** button and a comment box will appear. The Reviewer should provide reason(s) for rejection. Reviewer will select the **Save** button when done.

Employee Acknowledgment

*I have received and reviewed a copy of this evaluation and had the opportunity to discuss it with my supervisor. My signature does not necessarily mean that I agree with the evaluation, but represents acknowledgment of receipt. I understand I may provide to my supervisor a written response to this evaluation within 10 business days. My response must be signed and dated.*

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Approve Reject Close

Add Reviewer Comment

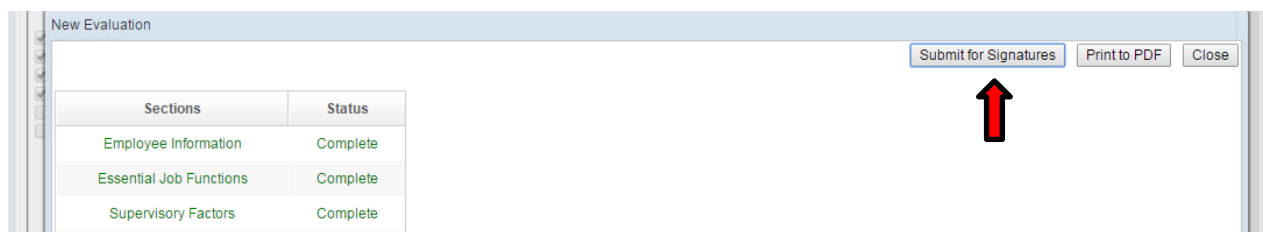
Clear Save Cancel

After the Reviewer has approved or rejected the evaluation, the Evaluator will receive an email notification from [ePM@ttu.edu](mailto:ePM@ttu.edu). The evaluator may make changes to evaluations that have been rejected by the Reviewer.



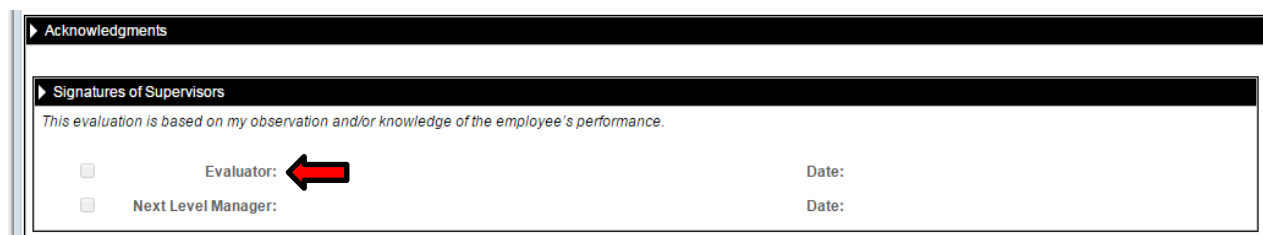
## Signing the Evaluation

When an evaluation is ready to be signed the Evaluator can select the **Submit for Signatures** button to begin the signature process. The Evaluator scrolls to the end of the page and selects the Evaluator signature box.



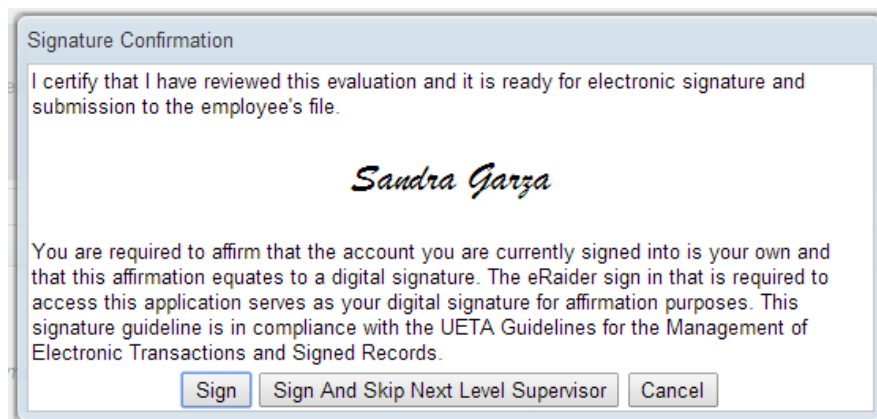
The screenshot shows the 'New Evaluation' form. At the top right, there are three buttons: 'Submit for Signatures', 'Print to PDF', and 'Close'. A red arrow points to the 'Submit for Signatures' button. Below the buttons is a table with the following data:

Sections	Status
Employee Information	Complete
Essential Job Functions	Complete
Supervisory Factors	Complete



The screenshot shows the 'Signatures of Supervisors' section. It contains the text: 'This evaluation is based on my observation and/or knowledge of the employee's performance.' Below this text are two rows of input fields. The first row is for the 'Evaluator' and the second row is for the 'Next Level Manager'. A red arrow points to the 'Evaluator' field.

A Signature Confirmation box will pop up. The Evaluator is given the option to select either the **Sign** button or the **Sign and Skip Next Level Supervisor** button to continue the signature process. Selecting the **Skip Next Level Supervisor** button will eliminate the next level manager from the signature process of the evaluation. Otherwise, the evaluation will automatically route to the next level supervisor. Once the next level supervisor signs the evaluation, it will be automatically routed to the employee.



The screenshot shows the 'Signature Confirmation' dialog box. It contains the text: 'I certify that I have reviewed this evaluation and it is ready for electronic signature and submission to the employee's file.' Below this text is a digital signature: *Sandra Garza*. Below the signature is the text: 'You are required to affirm that the account you are currently signed into is your own and that this affirmation equates to a digital signature. The eRaider sign in that is required to access this application serves as your digital signature for affirmation purposes. This signature guideline is in compliance with the UETA Guidelines for the Management of Electronic Transactions and Signed Records.' At the bottom of the dialog box are three buttons: 'Sign', 'Sign And Skip Next Level Supervisor', and 'Cancel'.

The file may be saved as a PDF by selecting the option at the top of the screen.



The screenshot shows the 'New Evaluation' form. At the top right, there are two buttons: 'Print to PDF' and 'Close'. A red arrow points to the 'Print to PDF' button. Below the buttons is a table with the following data:

Sections	Status
Employee Information	Complete
Essential Job Functions	Complete
Supervisory Factors	Complete

## Using Filters

Filters are located in the Position Description and Evaluation tabs. Filters allow users to view only documents in one or more of the select statuses. The most current evaluation will remain on the supervisor's main page. Previous evaluations created in ePM may be viewed by selecting the History box on the main page. Documents created by previous supervisors may also be viewed.



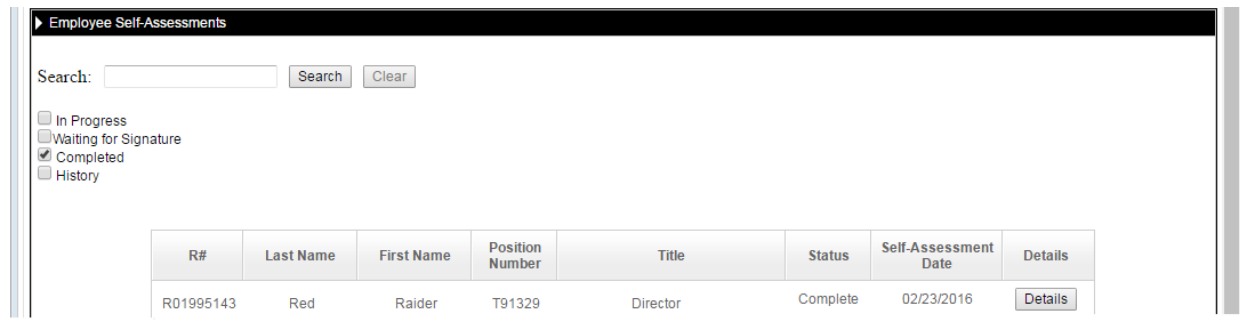
The screenshot shows the 'Employee Evaluations' interface. At the top right, there are '- Delete' and '+ Create' buttons. Below the title bar is a search field with 'Search' and 'Clear' buttons. A red circle highlights the filter options on the left:

- In Progress
- Submitted for Review
- Waiting for Signature
- Final
- History
- Previous Supervisors' Documents

Below the filters is a table with the following columns: R#, Last Name, First Name, Position Number, Title, Supervisor, Status, Evaluation Date, and Details.

## Supervisors - Viewing Self-Assessments

Supervisors may view Employee Self-Assessments on the evaluations tab main page. Self-Assessment is an integral part of the evaluation process. Employees should complete a self-evaluation and submit it prior to the supervisor completing the evaluation. Supervisors should review self-assessments and give them consideration prior to completing the employee's evaluation. Filters are available.



The screenshot shows the 'Employee Self-Assessments' interface. At the top right, there are '- Delete' and '+ Create' buttons. Below the title bar is a search field with 'Search' and 'Clear' buttons. Below the search field are filter options:

- In Progress
- Waiting for Signature
- Completed
- History

Below the filters is a table with the following columns: R#, Last Name, First Name, Position Number, Title, Status, Self-Assessment Date, and Details.

R#	Last Name	First Name	Position Number	Title	Status	Self-Assessment Date	Details
R01995143	Red	Raider	T91329	Director	Complete	02/23/2016	<a href="#">Details</a>

## Supervisor Maintenance

The Supervisor Maintenance tab allows organization managers and their ePM proxies to change employees' supervisors which are not listed or are incorrect in Banner. It is vital for employees to be assigned to the correct supervisor in order for ePM to function properly. There are also implications at the next level of supervision which make it necessary that this be correct. Begin by selecting the Supervisor Maintenance tab. The following page will appear:

Chart:  Organization:

Search:

R#	Name	Title	Position Number	Effective Date	Supervisor R#	Supervisor Name	Supervisor Title
----	------	-------	-----------------	----------------	---------------	-----------------	------------------

Employee:

Now Reports To:

Name:

R#:

Position Number:    Suffix:

Title:

Select the appropriate chart (T for Texas Tech; S for Systems), then enter the organizational code and select **Search**. A list of employees assigned to the organizational code will appear. Select the employee you wish to change by selecting on their name. You may also enter an employee's first or last name in the Search box to view only that employee's information. The employee to be changed will appear in the employee section. Next, use the drop down menu to find and select the new supervisor. Select the **Submit Changes to the HR System** button to complete the transaction.

Chart: T Organization: H15000 Search Clear H15000 - Human Resources

Search: Red Search Clear

R#	Name	Title	Position Number	Effective Date	Supervisor R#	Supervisor Name	Supervisor Title
R01995143	Red, Raider	Director	T91329-00	08/01/2016	R00522477	Matthew Phillips	Associate Managing Director

Employee: R01995143 Red, Raider Director

Now Reports To:

Last Name Garza Search

Name: Garza, Sandra

R#: R00086331

Position Number: T99282 Suffix: 00

Title: Section Manager

Submit Changes to HR System

Due to payroll processing timelines, any changes made to the Supervisor Maintenance tab near the end of the month will not become effective until the first day of the following month. To determine when the changes made to the supervisor maintenance tab will become effective, refer to the effective date section.

Chart: T Organization: H15000 Search Clear H15000 - Human Resources

Search: Red Search Clear

R#	Name	Title	Position Number	Effective Date	Supervisor R#	Supervisor Name	Supervisor Title
R01995143	Red, Raider	Director	T91329-00	08/01/2016	R00522477	Matthew Phillips	Associate Managing Director

Employee: R01995143 Red, Raider Director

## Proxy Maintenance

The Proxy Maintenance tab allows supervisors and organizational managers to assign a proxy who can assist them with completing performance management documents. Proxies are able to complete all functions of the employee performance process, but are not able to sign documents for the supervisor.

### Assigning Supervisor Proxies

To create a Supervisor proxy, select the Proxy Maintenance tab, and then select the **Create** button.

My PM Docs | Position Description | Evaluations | **Proxy Maintenance**

R#:

Name: Matthew Phillips

Position #: T94810 Title: Associate Managing Director

**Supervisor Proxies** - Delete + Create

*The Individual Level grants proxy permission to all documents for all employees assigned to the supervisor.*

R#	Last Name	First Name	Middle Initial
----	-----------	------------	----------------

From the pop-up menu, select the search criteria and enter the corresponding information (e.g. Last Name and Raider). Next, select **Search** and then select the name of the person you wish to make a proxy. Complete the action by selecting on the **Add Proxy** button.

My PM Docs | Self-Assessment | Performance | Proxy Maintenance

R#:

Name: Matthew Phillips

Position #: T94810 Title: Associate Managing Director

**Add New Employee Proxy**

Select Search Criteria: Last Name Raider Search

R#	Last Name	First Name	Middle Initial
R00527247	Raider	Red	

Add Proxy Cancel

*The Individual Level grants proxy permission to all documents for all employees assigned to the supervisor.*

R#	Last Name	First Name	Middle Initial
----	-----------	------------	----------------

The main screen will now indicate all supervisor proxies.

R#:  
Name: Matthew Phillips  
Position #: T94810 Title: Associate Managing Director

**Supervisor Proxies** - Delete + Create  
*The Individual Level grants proxy permission to all documents for all employees assigned to the supervisor.*

R#	Last Name	First Name	Middle Initial
R01995143	Red	Raider	

Those identified as proxies will log in to ePM using their own credentials. To act as a proxy, select the down arrow and change the Proxy field from yourself to the person who assigned you as their proxy.

My PM Docs Position Description Evaluations Proxy Maintenance

Proxy for: Matthew Phillips - Supervisor  
Matthew Phillips - Supervisor  
Sandra Garza - Supervisor  
Jodene Billingsley - Supervisor

**Employee** - Delete + Create

Search: [ ] Search Clear

In Progress  
 Submitted for Review

### Assigning Organization Manager Proxies

To create an organization manager proxy, select the Proxy Maintenance tab. Under the Organization Manager Proxies section, select the appropriate Chart and Organization from the dropdown selections and then select the **Create** button.

**Supervisor Proxies** - Delete + Create  
*The Individual Level grants proxy permission to all documents for all employees assigned to the supervisor.*

R#	Last Name	First Name	Middle Initial
R01995143	Red	Raider	

**Organization Manager Proxies** - Delete + Create  
*The Organization Level grants proxy permission to only that specific organization selected.*

Chart: T Organization: Human Resources - H15000

R#	Last Name	First Name	Middle Initial	Proxy Level
----	-----------	------------	----------------	-------------

From the pop-up menu, select the search criteria and enter the corresponding information (e.g. R#). Next, select Search and then select the name of the person you wish to make a proxy. Next, select the Proxy Level access desired. Selecting Supervisor Maintenance Only will give the proxy access to the

Supervisor Maintenance Tab. Selecting Full Access gives the proxy complete access to all tabs and the performance management documents for all employees within the specified organization Code. The proxy will be able to complete all actions for the organization manager with the exception of signing documents. Complete the action by selecting the **Add Proxy** button.

My PM Docs | Self-Assessment | Add New Organization Proxy

R#: R00522477  
Name: Matthew Phillips  
Position #: T94810 Title: A

Select Search Criteria: R# R00527247 Search Clear

R#	Last Name	First Name	Middle Initial
R00527247	Raider	Red	

Select Proxy Level: Supervisor Maintenance Only Full Access

Add Proxy Cancel

The main screen will now indicate all organization manager proxies.

Organization Manager Proxies - Delete + Create

The Organization Level grants proxy permission to only that specific organization selected.

Chart: T Organization: Human Resources - H15000

R#	Last Name	First Name	Middle Initial	Proxy Level
R00527247	Raider	Red		Full Access

Those identified as proxies will log in to ePM using their own credentials. To act as a proxy, select the down arrow and change the Proxy field from yourself to the person who assigned you as their proxy.

## Organization Manager View

Organization managers and their proxies have the ability to view all position description and performance evaluation documents within their organization code. In order to view these documents, the organization manager must select the appropriate chart and organization code from the drop down under the Employee Position Description, Vacant Position Description, Employee Evaluations, or Employee Self-Assessments section. If the chart and organization dropdowns are blank, no documents will appear. Additionally, organization managers may view specific employees by typing the employee's first or last name in the Search box.



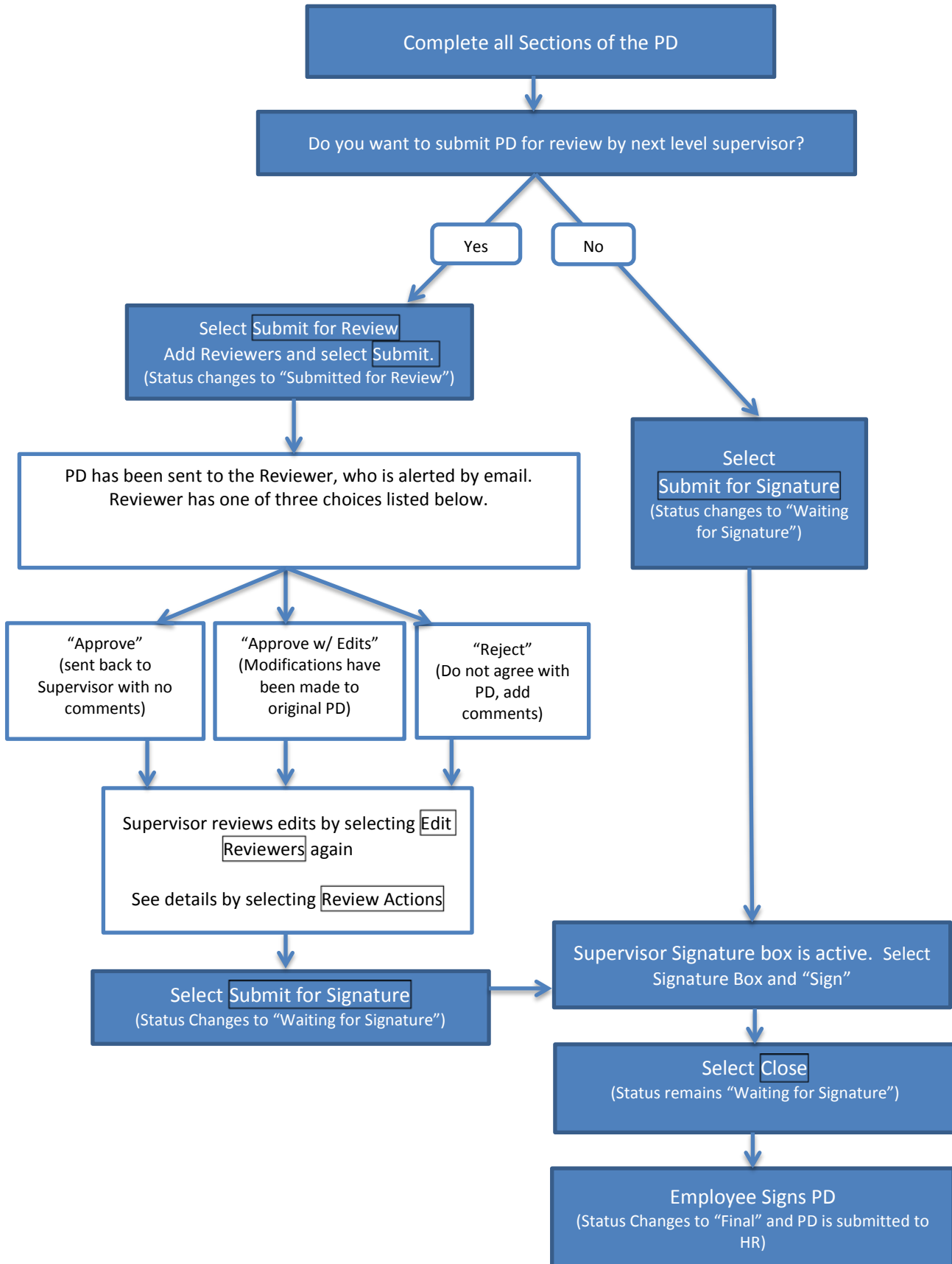
The screenshot displays the 'Employee Position Description (EPD)' interface. At the top, a 'Proxy for:' dropdown menu is set to 'Matthew Phillips - Org Manager'. Below this, the 'Employee Position Description (EPD)' section is highlighted in black, with '- Delete' and '+ Create' buttons on the right. A search bar is present with a 'Search' button and a 'Clear' button. A list of filters is shown on the left, including 'In Progress', 'Submitted for Review', 'Submitted for Final', 'Waiting for Signature', 'Final', 'History', and 'Previous Supervisors' Documents'. At the bottom, there are two dropdown menus: 'Chart:' set to 'T' and 'Organization:' set to 'Human Resources - H15000'. A 'Clear' button is located to the right of the 'Organization:' dropdown. Two red arrows point to the 'Chart:' and 'Organization:' dropdown menus.

## Conclusion

If you have questions or experience problems while using ePM, please contact the Human Resources Talent Management Team at 742-3650.



## Flow Chart for Completing the Position Description



## Flow Chart for Completing the Performance Evaluation

