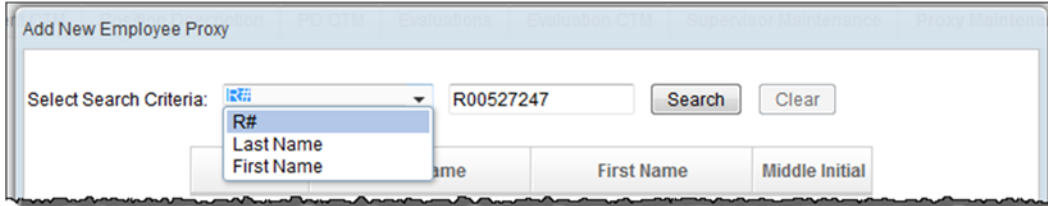# How to create an evaluation in the ePM system

1. Log in to ePM http://apps.texastech.edu/hr_epm/ and open the Evaluations tab.

2. In the Employee Evaluations section, click +Create.

2a. New Evaluation box will appear. Select Employee from the drop-down menu and click Search.

3. The New Evaluation form will appear.
   General information:
   - As you complete each section, click Mark Complete in the section header.
     - The button will change to Mark Incomplete, and "Complete" will appear next to it
     - If you need to edit a completed section, click the Mark Incomplete button.
   - HINT: as you mark each section complete, the status will change to Complete and turn green in the Status box at the top of the form.
   - HINT: as you complete each section, click the arrow or anywhere in the section header to collapse the section. This makes scrolling easier. To expand the selection, click the arrow again.
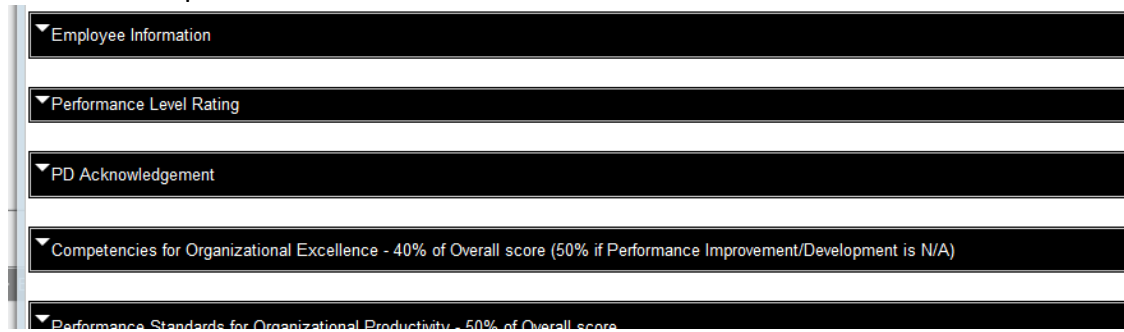
Sections expanded:

Sections collapsed:

4. **Employee Information** section: select the Evaluation Type (defaults to Annual).
   Then click Mark Complete.

5. **Performance Level Rating** section: Information only.

6. **PD Acknowledgement**: select appropriate response, click Save, and Mark Complete.

7. **Competencies** section: select rating for each competency. Comments are required for ratings of 1, 2, 3 or 7, optional for other ratings. Enter Summary comments if desired. Save and Mark Complete.

8. **Performance Standards** (Functions):
   HINT: This will pull in the functions from the most recently completed Position Description. If these do not look correct, delete this evaluation, complete a Position Description with supervisor and employee signatures, and start another evaluation.
Select rating for each Function. Comments are required for ratings of 1, 2, 3 or 7, optional for other ratings. Enter Summary comments if desired. Save and Mark Complete.

9. **Performance Improvement/Development Plans for Previous Year**: This will pull in data from the last evaluation. If blank, skip this section. Otherwise select ratings. Comments are required for ratings of 1, 2, 3 or 7, optional for other ratings.

10. **Performance Improvement/Development Plans for Next Year**: Performance Improvement Plan will be pre-populated with any competencies or functions with ratings of 1, 2 or 3. You may also add others. Add Development Plan Items as desired. Any items require a target date. Mark Complete.

11. **Summary Comments**. Enter comments as desired. Mark Complete

12. **Submit for Review** (Optional): click Submit for Review button at the top.
The New Evaluation Review window appears. Click +Create, enter the Search criteria, highlight the correct name from the results list, and click Add Reviewer.

Then click Submit

A notification will pop up, "An email has been sent to Reviewers." Click OK and close the evaluation. The evaluation status will change to Submitted for Review (make sure this filter box is checked).

The reviewer will receive an email:

-----Original Message-----
From: ePM@ttu.edu [mailto:ePM@ttu.edu]
Sent: Monday, August 01, 2016 5:59 PM
To: Supervisor, Super
Subject: Evaluation for Red Raider

An Evaluation for Red Raider has been submitted for your review.
You may log in to the ePM system by selecting the link below. The evaluation waiting for your review will be found in the Evaluation Reviews section of the Evaluations tab.
http://apps.texastech.edu/hr_epm/

The reviewer takes one of two actions:
        Reject: evaluation is returned to evaluation with comments
        Sign and Approve: evaluation is returned to evaluator with no comments

Then the evaluator receives an email. Sample email of evaluation rejected by reviewer:

-----Original Message-----
From: ePM@ttu.edu [mailto:ePM@ttu.edu]
Sent: Monday, August 01, 2016 6:07 PM
To: Rider, Masked <masked.rider@ttuhsc.edu>
Subject: Review of Evaluation for Red Raider

The Evaluation for Red Raider has been reviewed, and returned for your action.
It was returned for correction for the following reason: reject not done You may log in to the ePM system by selecting the link below. The evaluation will be found at the Evaluations tab.
http://apps.texastech.edu/hr_epm/

You may also see the comments by opening the evaluation Details, clicking Submit for Review, highlighting the name from the reviewer list, and an *Eval Comment* box will appear.
Then take appropriate action and proceed with the evaluation. The evaluation status will change accordingly.

13. **Submit for Signatures**: Once all sections have been marked complete:
- Click Submit for Signatures.
- Sign as Evaluator:
  - o Check the box next to Evaluator. The Signature Confirmation Box appears. Click one of the *Sign* buttons, depending on your Organization's procedures
  - o *Sign*: routes evaluation to the next level supervisor, i.e. your direct supervisor. *It does **not** route to the employee until after the next level supervisor signs.*
  - o *Sign and Skip Next Level Supervisor*: routes evaluation directly for employee signature
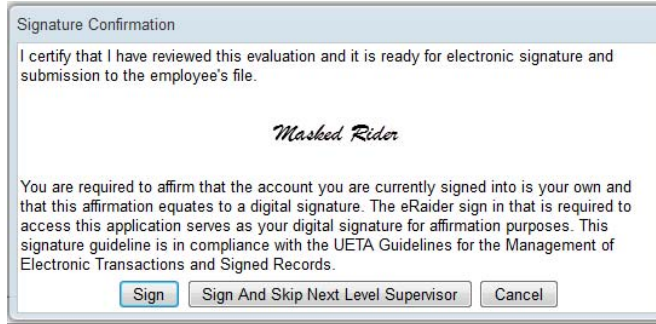
  - o HINT: If your organization requires approval from someone other than your next level supervisor, e.g. an administrator:
    - Submit for Review to that person before signing the document
    - The reviewer will need to Sign and Approve

The evaluation status will change to Waiting for Signature.

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Evaluation Date	Details
R00527247	Raider	Red	H95017	Section Supervisor	Masked Rider	Waiting for Signature	08/01/2016	Details

The employee will receive an email notification.
-----Original Message-----
From: ePM@ttu.edu [mailto:ePM@ttu.edu]
Sent: Wednesday, June 08, 2016 3:45 PM
To: Raider, Red <red.raider@ttuhsc.edu>
Subject: Evaluation for Red Raider

Your supervisor has submitted a performance evaluation for your review and signature.
    You may log in to the ePM system by selecting the link below. The evaluation will be found in the My Evaluations section of the My PM Docs tab.
    http://apps.texastech.edu/hr_epm/

You will receive an email notification when the employee has signed the evaluation.
-----Original Message-----
From: ePM@ttu.edu [mailto:ePM@ttu.edu]
Sent: Tuesday, June 14, 2016 4:25 PM
To: Rider, Masked <masked.rider@ttuhsc.edu>
Subject: Evaluation for Red Raider

The performance evaluation for Red Raider has been signed and sent to the employee's official file.
You may log in to the ePM system by selecting the link below to review the completed evaluation.
http://apps.texastech.edu/hr_epm/

The evaluation status will change to Final.

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Evaluation Date	Details
R00527247	Raider	Red	H95017	Section Supervisor	Masked Rider	Final	08/01/2016	Details

The employee's evaluation will be sent immediately to the employee's file and the rating will post immediately to Banner. The record will appear the following day in the COGNOS HR062 and HR062C reports.

Unlock:
After you have signed as evaluator, but before the employee has signed it, you can unlock the evaluation.
> *Human Resources does not have the ability to unlock documents.*

1. Find the evaluation in your list, click Details, and click the Unlock button at the top.

2. Be sure to let the employee know you have unlocked the evaluation, as automated notification will not be sent.
3. Edit and process the document as needed.
4. If the employee has already signed the evaluation, it cannot be unlocked by anyone.
> You will need to complete another evaluation.
> Contact HR to remove the document from the employee's record.
> You can delete the document from ePM (use extreme caution when deleting documents).