Note: Steps 1-3 outline how to access OPMS from a City Schools computer and using the City Schools network.

**Step 1:**
Click **ERP Production** to access the OPMS portal.

**Step 2:**
Type your username and password into the text boxes. Click the **Login** button.

**Step 3:**
Click on the folder labelled **Manager Self Service**. Then click on the link labelled **Performance Management**.
Step 4:
Click on the green arrow icon next to Task: CUB Annual Evaluation.

Note: The systems will update each school year.

Step 5:
Appraisals in Progress lists all of the open evaluations in your queue for this task, by employee name.

Click on the yellow pencil icon to update the evaluation form for that employee.

Note:
You can check the status of all open evaluations:
- **Planned** – You have not touched the evaluation.
- **Transferred to employee** – You have completed the form and sent it to the employee.
- **Ongoing with Main Appraiser** – The employee has reviewed the evaluation and sent it back to you.
NOTE:
If you cannot complete the task for the employee at this time, select a reason from the evaluation waiver drop down box.

Click Continue and continue to click the button farthest to the right until you complete the task.

Step 6:
To begin completing the questionnaire, click the button that says Complete Questionnaire.

Step 7:
Enter the data into the appropriate fields to complete the questionnaire.
Scroll down to complete the entire questionnaire for the employee.

**NOTE:** There are three possible ratings for each indicator.

**Step 8: Communications**
Click the buttons for the rating for each statement.

Enter any comments for this section in the **Specific Examples Comments:** Box.

Scroll down to the next section.

**Repeat Step 8** for each of the remaining five domains.

---

**Performance Evaluation Rating Worksheet**

1. Communications

| 1.1. Communicates in an open, respectful and consistent manner | • Highly Effective • Effective • Developing |
| 1.2. Speaks effectively and writes clearly when communicating with all stakeholders | • Highly Effective • Effective • Developing |
| 1.3. Maintains the confidentiality of written and verbal communications | • Highly Effective • Effective • Developing |
| 1.4. Keeps stakeholders informed about issues that may affect them or operations within their school, department or organization | • Highly Effective • Effective • Developing |
| 1.5. Gathers and delivers information effectively on the phone, in email | • Highly Effective • Effective • Developing |

**Specific Examples, Comments:**

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**Score Range** | **Individual Annual Evaluation Rating**
---|---
90-70 | Highly Effective
69-50 | Effective
49 and below | Developing
**Step 9:**
Enter any Overall Comments in the box provided.

**NOTE:**
Once all the ratings have been entered using the drop-down menus and Overall Comments have been entered, click on the **Save** Button.

**Step 10:**
After completing the evidence for all of the Domains, you will be taken back to the main evaluation form.

Here, you will need to **select the overall annual evaluation rating** based on the sum of all of the indicator scores for this employee.

**As a reminder:** Please see the image in the form that outlines each indicator rating value and the overall score ranges for the annual evaluation rating.

Please enter the **Overall Rating** for the employee from the **drop-down box** and enter any additional comments.
**Note:**
To add an attachment:

- Click on the **Add** button.
  1. **Complete** the attachment description.  
     *Note: Include the employee’s name in the title.*  
  2. Click on the **Choose File** button to find and select a saved file from your computer.  
  3. Click the **Apply** button.

**Step 11:**
At the bottom of the screen, click on the button labelled “Share with Appraisee”.

**Note:**
All forms in OPMS must be shared with the appraisee.

**NOTE:** All forms in OPMS must be shared with the appraisee.

**Step 12:**
Add a message to share with the employee, type it into the box labelled “Notification Message to Employee”

*Note: This does NOT become part of the conference form.*

Click the **Submit** button to complete the evaluation and send it to the employee.
Note:
The confirmation message indicates the form was sent.

You have successfully initiated the Observation task for your employee.

This task will **NOT be considered complete** ("Closed") until the employee reviews and returns the form to your queue, and you close out the task.
OPMS – CUB Annual Evaluation
Supervisor Help Guide: Completing the CUB Annual Evaluation

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Step 1:</strong></td>
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</tr>
<tr>
<td><strong>Step 5:</strong></td>
<td>Click on the yellow pencil icon.</td>
</tr>
<tr>
<td>Step 6: Click the <strong>Next</strong> button if you want to proceed with finishing this evaluation task.</td>
<td></td>
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<tr>
<td>Step 7: Click on the <strong>Continue</strong> button.</td>
<td></td>
</tr>
<tr>
<td>Step 8: Click on the <strong>Finish</strong> button.</td>
<td></td>
</tr>
<tr>
<td>Step 9: Click on the <strong>Yes</strong> button.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You can review any employee comments.

**Note:** The confirmation message indicates that you have successfully completed the CUB Annual Evaluation for this employee.

✔️ You have **successfully completed** the Annual Evaluation for your employee.