## OPMS – L44 Annual Evaluation
### Supervisor Help Guide: Initiating the L44 Annual Evaluation in OPMS

**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 **Manager Self Service** and then click **Performance Management**.

**Step 4:**
Click on the **green arrow icon** next to the **Task: L44 Annual Evaluation**

**Note:** The systems will update each school year.

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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 in order to open the evaluation 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.

Step 6:
To begin, click on the update pencil next to the indicator you wish to enter evidence and comments for.
**Step 7:**
Enter comments and evidence, using specific examples and identify areas of strength and weakness.

Click the **Apply and Update Next** button to complete entering evidence for all of the Indicators.

Click the **Apply** button after entering evidence for Indicator 1.5.

**Note:**
For all forms in OPMS, **all** Key Actions/Focus Areas **must be** rated/answered in order to share the form the the Appraisee.
Step 8: After entering ratings and evidence for all of the Indicators, you will be taken back to the main page.

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

Step 10: Click the Share with Appraisee button.

Note: All forms in OPMS must be shared with the appraisee.
**Step 11:**
Add a notification message to your employee. Then, click the **Submit** button.

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

<table>
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<th>Note:</th>
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<td>The confirmation message indicates that you have successfully transferred the L44 Annual Evaluation form to the appraisee.</td>
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- ✓ You have successfully initiated the Annual Evaluation 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 – L44 Annual Evaluation**
Supervisor Help Guide: Completing the L44 Annual Evaluation

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

**Step 1:**
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**Step 2:**
Type your username and password into the text boxes. Click the **Login** button.

**Step 3:**
Click on **Manager Self Service** and then click **Performance Management**.

**Step 4:**
Click on the **green arrow icon** next to the **Task: L44 Annual Evaluation**

**Note:** The systems will update each school year.
Step 5: Click on the yellow pencil icon.

Note: You can review any employee comments.

Step 6: Click the Next button if you want to proceed with finishing this evaluation task.

Step 7: Click on the Continue button.

Step 8: Click on the Finish button.

Step 9: Click on the Yes button.

Note: The confirmation message indicates that you have successfully completed the L44 Annual Evaluation for this employee.

✓ You have successfully completed the Annual Evaluation for your employee.