OPMS – PBES Annual Evaluation Report
Supervisor Help Guide: Initiating the PBES Annual Evaluation Report

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: Annual Evaluation Report – Teacher-Level Staff

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** 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.

Step 6:
To begin, select a rating from the *drop down box* for each domain.

Step 7:
Click on the *update pencil* next to the domain you wish to enter evidence and comments for.
Step 8:
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 Domains.

Click the Apply button after entering evidence for Domain 4.

Note:
For all forms in OPMS, all Key Actions/Focus Areas must be rated/answered in order to share the form the Appraisee.

Step 9:
After completing the evidence for all of the Domains, 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. The system already displays the Suggested Overall Rating based on the Domain ratings that you provided and the rubric in the PBES Guidebook.
**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:**
You can add a message to your employee. This does NOT become part of the conference form. Then, click the **Submit** button.

**Note:**
The confirmation message indicates that you have successfully transferred the PBES Annual Evaluation form to the appraisee.

- ✓ **You have successfully initiated the Annual Evaluation Report 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 – PBES Annual Evaluation Report

### Supervisor Help Guide: Completing the PBES Annual Evaluation Report

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>Click <strong>ERP Production</strong> to access the OPMS portal.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Type your username and password into the text boxes. Click the <strong>Login</strong> button.</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Click on <strong>Manager Self Service</strong> and then click <strong>Performance Management</strong>.</td>
</tr>
</tbody>
</table>
| Step 4: | Click on the **green arrow icon** next to the **Task: Annual Evaluation Report – Teacher-Level Staff**.  
**Note:** The systems will update each school year. |

**Note:** Steps 1-3 outline how to access OPMS from a City Schools computer and using the City Schools network.
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 PBES Annual Evaluation for this employee.

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