## OPMS - PSRP Annual Evaluation
### Supervisor Help Guide: Initiating the PSRP Annual Evaluations 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 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: PSRP 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 or you have opened and saved the form.
NOTE:
If you cannot complete the evaluation 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.

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

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Step 7:
Enter the data into the appropriate fields to complete the questionnaire.

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**EVALUATION FORM FOR PSRP MEMBERS**

Date:(MM/DD/YYYY):

Supervisor/Main Appraiser:

Employee's Position:
Scroll down to complete the entire questionnaire for the employee.

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

**Step 8: Enter Ratings and Comments**

Click the buttons for the rating for each statement.

Enter any comments and evidence, using specific examples and identify areas of strength and weakness in the **Specific Examples, Comments**: box.

Scroll down to the next section.

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

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

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Individual Annual Evaluation Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>90-70</td>
<td>Highly Effective</td>
</tr>
<tr>
<td>69-50</td>
<td>Effective</td>
</tr>
<tr>
<td>49 and below</td>
<td>Developing</td>
</tr>
</tbody>
</table>

Rate each competency according to the scale. Use examples and comments to support the ratings and subtotal the ratings under each Competency. When you are finished, calculate the Overall Rating using the Ratings Table.

**Performance Evaluation Rating Worksheet**

1. Communications

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

Specific Examples, Comments:
Step 9:
Enter any Overall Comments in the box provided.

NOTE:
Once all the ratings have been entered and Supervisor’s Comments have been entered, click on the Save Button.

Step 10:
After entering the ratings for each 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 your indicator scores for this employee.

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:**
Click on the button labelled “Share with 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.
<table>
<thead>
<tr>
<th>Note:</th>
<th>The confirmation message indicates the form was sent.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>You have successfully initiated the Annual Evaluation task for your employee.</td>
</tr>
<tr>
<td>✔</td>
<td>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.</td>
</tr>
</tbody>
</table>
# OPMS – PSRP Annual Evaluation

**Supervisor Help Guide: Completing the PSRP Annual Evaluation**

*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: PSRP 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 PSRP Annual Evaluation for this employee.

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