## OPMS- Professional Expectations Task
### Supervisor Help Guide: Initiating and Completing the Form

**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 OPMS.

### 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 **Professional Expectations**.

**Note:** The systems will update each school year.
**Step 5:**

*Appraisals in Progress* lists all of the open evaluation forms in your queue for this task, by employee name.

Click the **yellow pencil** to access the evaluation task.

**Note:**
You can check the status of all open evaluation tasks:
- **Planned** – You have not touched the form.
- **Transferred to employee** – You have completed the form and sent it to the employee.
- **Ongoing with Main Appraiser** – The employee has reviewed the form and sent it back to you.

**Step 6:**

After opening the Professional Expectations form, you will see the indicators listed with yellow pencils next to them.
NOTE: If you cannot complete the evaluation for the employee at this time, select a reason from evaluation waiver drop down box.

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

Step 7:
To begin completing the form, click the yellow pencil.

Note:
The Indicators require a rating and comment in each section.

Step 8:
Select your rating from the drop down box.

Type your comments in the space provided.

Click the Apply and Update Next to move to the next indicator.
**Step 9:**
After you’ve selected a rating and entered a commented for each indicator, click **Apply** after the completing the **last indicator**.

**Note:**
All Indicators MUST be rated/filled in order for the form to be shared with the Appraisee.

**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 **Share with Appraisee**.

<table>
<thead>
<tr>
<th>Step 9</th>
<th>Step 10</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td><img src="image2.png" alt="Image" /></td>
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</table>

*Last updated August, 2018*
**NOTE:**
All forms in OPMS must be shared with the Appraisee.

<table>
<thead>
<tr>
<th>Step 11:</th>
<th>You can add a notification message to your employee. This does NOT become part of the input form. Then, click the Submit button.</th>
</tr>
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<tbody>
<tr>
<td>Note:</td>
<td>The confirmation message indicates that you have successfully transferred the task to the appraisee.</td>
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</table>

- ✓ You have successfully initiated the Professional Expectations 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- Professional Expectations Task
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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: *Professional Expectations*.

**Note:**
The systems will update each school year.
Step 5: Click on the yellow pencil icon in order to open the Professional Expectations task for that employee.

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.

Warning: You have chosen to complete this appraisal. You cannot update a completed appraisal. Do you want to continue?
Note:
The confirmation message indicates that you have successfully completed Professional Expectations task for this employee.

✓ You have successfully completed the Professional Expectations task for your employee.