

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.

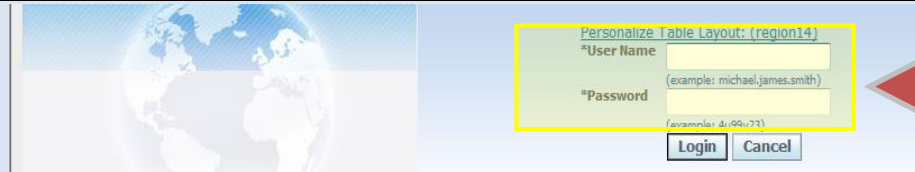
Step 1:

Click **ERP Production** to access OPMS.



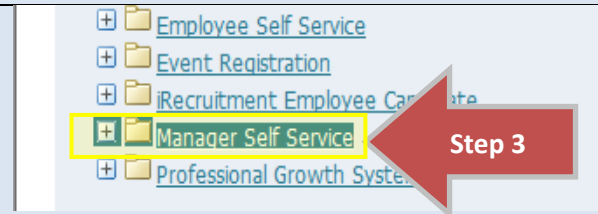
Step 2:

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:

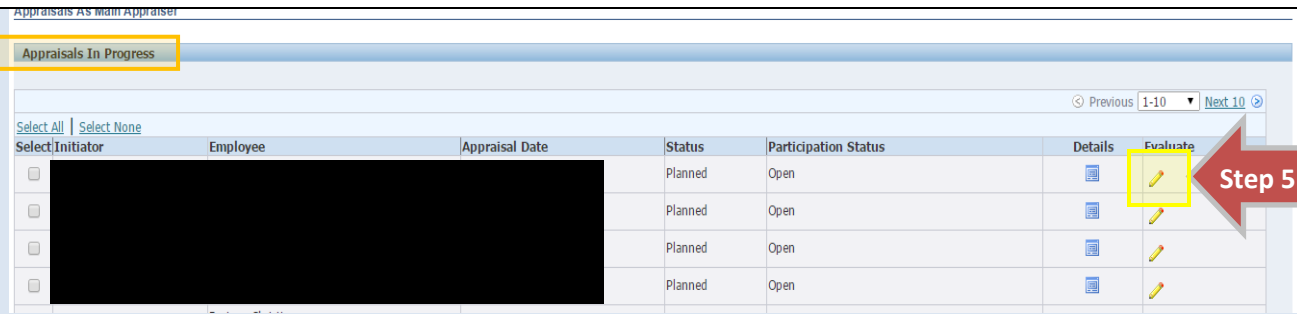
The systems will update each school year.

Task	Start Date	End Date	Icon
Task: BTU 1st Obs Observation Conference SY 14-15	10-Feb-2014	01-Jul-2015	Green arrow icon
BTU: Classroom Teacher Professional Expectations SY 14-15	23-Feb-2015	01-Aug-2015	Green arrow icon
Task: Professional Expectations SY 14-15	23-Feb-2015	01-Apr-2015	Green arrow icon (highlighted with a yellow box)
BTU: OPMS Classroom Teacher Observations SY 14-15	01-Oct-2014	01-Aug-2015	Green arrow icon
Task: BTU 1st Obs Observation Conference SY 14-15	08-Oct-2014	01-Jul-2015	Green arrow icon

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.



Appraisals As main Appraiser

Appraisals In Progress

Previous 1-10 Next 10

Select All | Select None

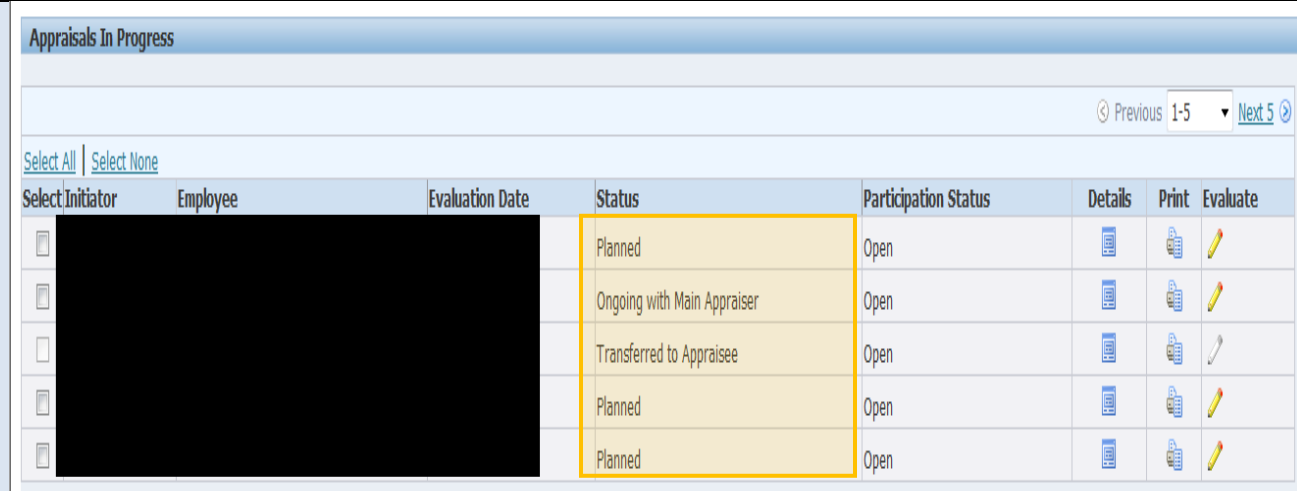
Select	Initiator	Employee	Appraisal Date	Status	Participation Status	Details	Evaluate
<input type="checkbox"/>				Planned	Open		
<input type="checkbox"/>				Planned	Open		
<input type="checkbox"/>				Planned	Open		
<input type="checkbox"/>				Planned	Open		

Step 5

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.



Appraisals In Progress

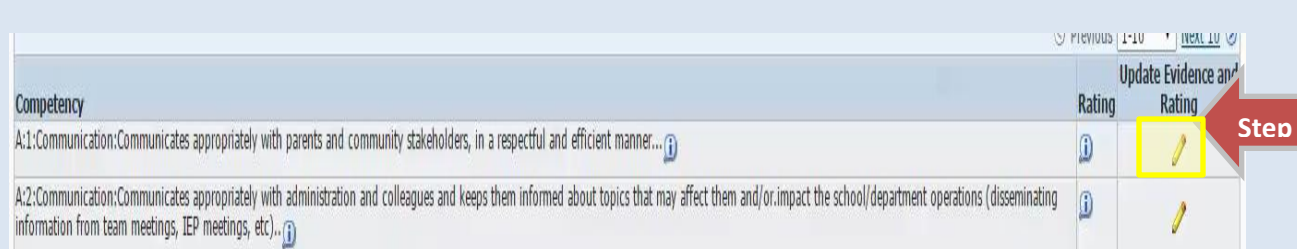
Previous 1-5 Next 5

Select All | Select None

Select	Initiator	Employee	Evaluation Date	Status	Participation Status	Details	Print	Evaluate
<input type="checkbox"/>				Planned	Open			
<input type="checkbox"/>				Ongoing with Main Appraiser	Open			
<input type="checkbox"/>				Transferred to Appraisee	Open			
<input type="checkbox"/>				Planned	Open			
<input type="checkbox"/>				Planned	Open			

Step 6:

After opening the Professional Expectations form, you will see the indicators listed with yellow pencils next to them.



Appraisals As main Appraiser

Previous 1-10 Next 10

Competency	Rating	Update Evidence and Rating
A:1:Communication:Communicates appropriately with parents and community stakeholders, in a respectful and efficient manner...		
A:2:Communication:Communicates appropriately with administration and colleagues and keeps them informed about topics that may affect them and/or impact the school/department operations (disseminating information from team meetings, IEP meetings, etc)...		

Step 6

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.

TIP Then click the "Continue" button and proceed to the next page. NOTE: The selected reason will be verified by the Office of Human Capital.

Details	Key Actions	Rating	Update Details
Show	1:1:Communication:Communicates appropriately with parents and community stakeholders, in a respectful and efficient manner...	i	
Show	1:2:Communication:Communicates appropriately with administration and colleagues and keeps them informed about topics that may affect them and/or impact the school/department operations (disseminating information from team meetings, IEP meetings, etc.)...	i	
Show	1:3:Communication:Communicates appropriately and respectfully with students and reinforces school message/...	i	
Show	1:4:Communication:Maintains the confidentiality of written and verbal communications...	i	
Show	2:1:Professionalism:Is conscientious, thorough, accurate and reliable when completing tasks as outlined in job description or those mutually agreed upon...	i	
Show	2:2:Professionalism:Maintains a neat and appropriate appearance...	i	
Show	2:3:Professionalism:Has not accrued 4 or more absence occasions, as outlined in the City Schools Attendance Program...	i	
Show	2:4:Professionalism:At any point in the evaluation period, has not accrued 4 or more latenesses, as outlined in the City Schools Attendance Program...	i	
Show	3:1:Professional Practice:Collaborates with colleagues to achieve the school's School Performance Plan (SPP) goals...	i	
Show	3:2:Professional Practice:Takes responsibility for his/her individual role in the work and is open to feedback...	i	



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

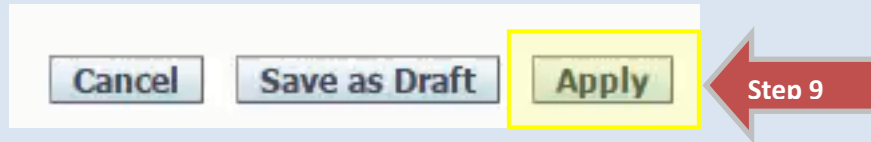
Type your comments in the space provided.

Click the Apply and Update Next to move to the next indicator.



Step 9:

After you've selected a rating and entered a comment for each indicator, click **Apply** after completing the **last indicator**.



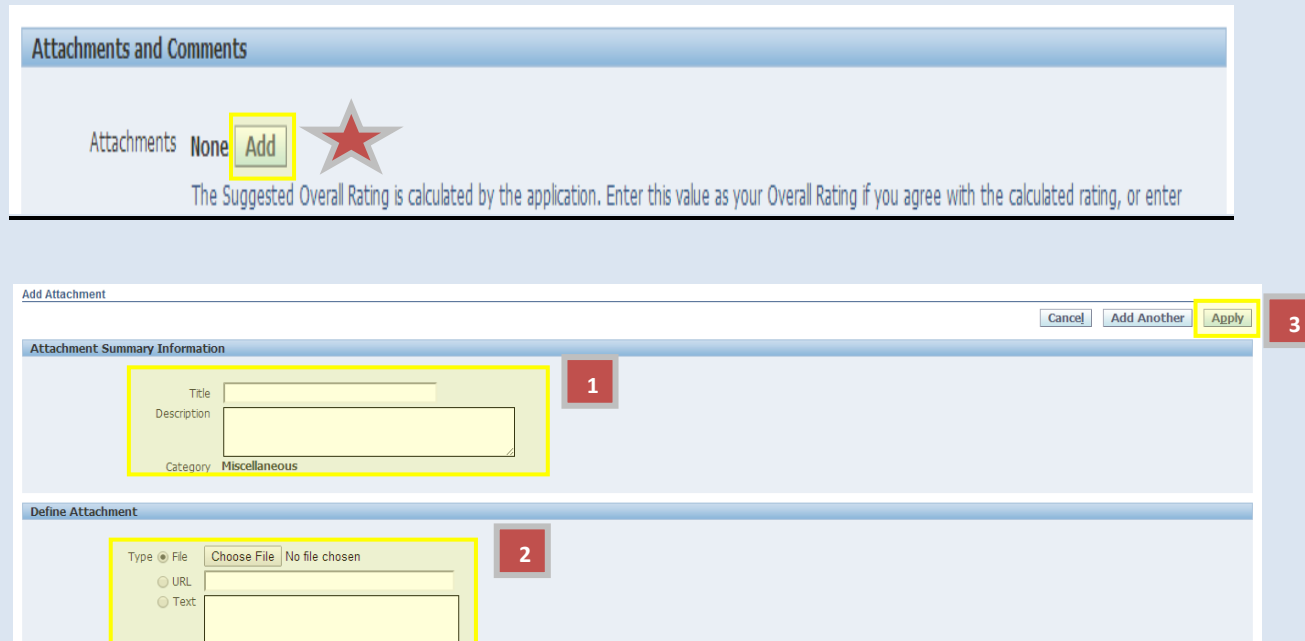
Note:

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

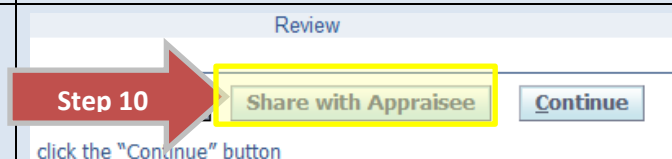
Note:

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**.



NOTE:

All forms in OPMS must be shared with the Appraisee.

Step 11:

You can add a notification message to your employee. This does NOT become part of the input form. Then, click the **Submit** button.

Share Evaluation Details with Employee

Notification Message to Employee

Enter your message, and click Submit to share the appraisal with the appraisee.

Notification message from supervisor

Submit

Note:

The confirmation message indicates that you have successfully transferred the task to the appraisee.

Confirmation

The appraisal has been transferred to the appraisee.

- ✓ 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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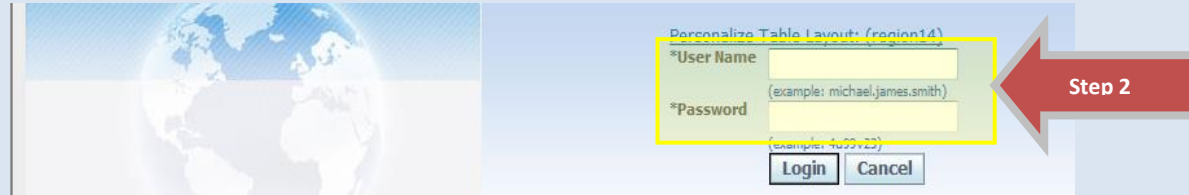
Step 1:

Click **ERP Production** to access the OPMS portal.



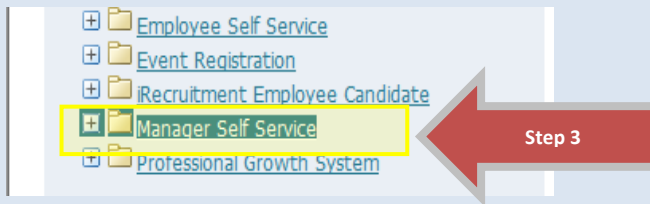
Step 2:

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.

Task	Start Date	End Date	Icon
Task: BTU 1st Obs Observation Conference SY 14-15	01-DEC-2014	31-DEC-2015	
BTU: Classroom Teacher Professional Expectations SY 14-15	23-Feb-2015	01-Aug-2015	
Task: Professional Expectations SY 14-15	23-Feb-2015	01-Apr-2015	
BTU: OPMS Classroom Teacher Observations SY 14-15	01-Oct-2014	01-Aug-2015	
Task: BTU 1st Obs Observation Conference SY 14-15	01-Oct-2014	01-Jan-2015	

Step 5:

Click on **the yellow pencil icon** in order to open the Professional Expectations task for that employee.

Appraisals As Main Appraiser

Appraisals In Progress

Previous 10 11-14 of 14 Next

Select All | Select None

Select	Initiator	Employee	Appraisal Date	Status	Participation Status	Details	Evaluate
<input type="checkbox"/>				Planned	Open		
<input type="checkbox"/>				Ongoing with Main Appraiser	Open		

Step 5 (arrow pointing to yellow pencil icon)

Note:

You can review any employee comments.

Overall Comments

Observer Comments

Employee Comments **Employee comments here.**

Step 6:

Click the **Next** button if you want to proceed with finishing this evaluation task.

Navigator Favorites Home Logout Preferences Help

Employee Name [redacted] Employee Number [redacted]

Email Address [redacted] Organization [redacted]

Save Update **Next**

Step 6 (arrow pointing to Next button)

Step 7:

Click on the **Continue** button.

Final Ratings: Main Observer

Cancel **Continue**

Step 7 (arrow pointing to Continue button)

Step 8:

Click on the **Finish** button.

Final Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Back **Finish**

Step 8 (arrow pointing to 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?.

No **Yes**

Step 9 (arrow pointing to Yes button)

Note:

The confirmation message indicates that you have successfully completed Professional Expectations task for this employee.

 **Confirmation**
The appraisal is complete.

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