

# EXEMPT-PERFORMANCE APPRAISAL SYSTEM (E-PAS) INSTRUCTIONAL OUTLINE

To access the E-PAS system, log into CCNET on the College website and under Employee Applications, click on the E-PAS icon.



**Any questions on E-PAS contact:**

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## **I. BRIEF OVERVIEW OF EXEMPT EVALUATION PROCESS**

### **A. FREQUENCY (Supervisors and Employees)**

1. When an employee acquires exempt status, the employee will receive yearly performance evaluations for the first three (3) years.
2. After three (3) years, the frequency of performance evaluations will then be every two (2) years.
3. All exempt employees have performance evaluations due in either Winter (*due February 1<sup>st</sup>*) or in Spring (*due May 1<sup>st</sup>*).

### **B. NOTIFICATION (Supervisors and Employees)**

1. Each supervisor and the employee(s) they supervise will be notified when they are due to participate in the performance evaluation process.
2. This notification will come in the form of an email from the E-PAS system.
3. This notification will be initiated by the Human Resource office.
4. The notification will come one month prior to the performance evaluation being due.

### **C. INITIAL MEETING (Supervisors and Employee)**

1. Once notified, the supervisor will need to schedule a meeting with the employee to be evaluated.
2. During this initial meeting, both the supervisor and employee will work together to create the evaluation. (*instructions listed below*)
  - a. In the creation process, the supervisor and employee will choose the Values the employee will be evaluated on.
  - b. The supervisor and employee will choose Peers and/or Faculty/Staff to participate in the evaluation process, as well.
  - c. Once this is done, notifications will automatically go out to all peers and/or faculty/staff who were chosen to participate.
    - i. A notification does not go out to the employee for their self-evaluation; this should be communicated to the employee during this initial meeting.

**D. SELF EVALUATION (Employee)**

1. After the initial meeting, the employee will do their Self-Evaluation in the E-PAS system. *(instructions are listed below)*

**E. PEER – FACULTY/STAFF EVALUATIONS (Other Staff)**

1. If chosen as a peer and/or faculty/staff to be included in the evaluation process, you will be notified by email.
2. You will log into the E-PAS system and fill out the evaluation form. *(instructions listed below)*

**F. EVALUATION STATUS (Supervisors)**

1. The supervisors will need to check the status frequently during the evaluation process. *(instructions listed below)*
2. Reminder notifications (e-mails) can be generated through the E-PAS system for those peers and/or faculty/staff that have not completed their assigned task.
3. These are initiated by the supervisor in the E-PAS system. *(instructions listed below)*
4. A reminder can only be sent once for each Peer and/or Faculty/Staff.

**G. SUMMARY & FORMALIZATION (Supervisor and Employee)**

1. Once all evaluations have been completed, the supervisor will schedule a second meeting with the employee.
2. The supervisor will print a summary of all information received and go over it with the employee. *(instructions listed below)*
3. The supervisor and employee will then complete the formal evaluation.
4. The formal evaluation then needs to be printed and signed.
5. This ends the evaluation process.

**II. E-PAS STEP-BY-STEP INSTRUCTIONS**

**A. EVALUATION NOTIFICATION & CREATION (for Supervisor/Employee)**

[See PowerPoint Presentation Slides #1-13]

1. **Notification** – The Human Resource department will initiate the evaluation process. Once initiated, the supervisor and employee will receive an email notification.
2. **Creation** – Once the supervisor and employee receive their notification, via email, they need to meet in order to create the evaluation.
  - a. The supervisor will login to the E-PAS system either through the link in the email notification or on the College website.
  - b. Once in the system, on the menu down the left-hand side, click on Create Evaluation.
  - c. Choose the employee.
  - d. Review and choose the Values that the supervisor and employee agree upon.
  - e. Choose the peers you want to request information from for this evaluation process. Peers, for the purpose of this evaluation process, are considered co-workers, generally the same level of employee. You can choose up to 10 peers. If the employee has supervisory responsibilities, you have to choose a minimum of 5 peers. If the employee does not have supervisory responsibilities, you have to choose a minimum of 3 peers.

- i. If you want to use a part-time faculty member as a peer, please contact Sarah Aschenbrenner, ext. 4603, so that she can ensure the employee is listed properly in PPMS so that it doesn't cause a glitch with the E-PAS system.
- f. Choose the faculty/staff you want to request information from for this evaluation process, only if the employee has supervisory responsibilities. Faculty/staff, for the purpose of this evaluation process, are generally considered to be subordinates. If the employee has supervisory responsibilities, you have to choose a minimum of 5 faculty/staff.
  - i. If you want to use a part-time faculty member as a faculty/staff, please contact Sarah Aschenbrenner, ext. 4603, so that she can ensure the employee is listed properly in PPMS so that it doesn't cause a glitch with the E-PAS system.
- g. At this point, you will review the choices you made and make any necessary changes.
- h. If you are unable to finish creating the evaluation, click on SAVE at the bottom of the form.
- i. Once you are finished creating the evaluation and are satisfied with it, you will SUBMIT the evaluation.
- j. On the next screen you will see verification that all notifications were sent to any Peers and/or Faculty/Staff who were chosen to participate.

**B. SELF EVALUATION (for Employees)**

[See PowerPoint Presentation Slides #14-26]

1. The employee will not receive additional notification of the need to do a self-evaluation. This should be communicated during the initial meeting.
2. The employee needs to access the E-PAS system, either through the link in the email notification or on the College website.
3. Once in the system, on the menu down the left-hand side, click on Self-Evaluation.
4. Choose the appropriate Review Period.
5. Fill out the Evaluation form. It includes its own set of instructions.
6. If you are unable to finish the self evaluation, click on SAVE at the bottom of the form.
7. Once you are finished and are satisfied with it, you will SUBMIT the evaluation.
8. You can view your Self-Evaluation after it has been submitted, but you cannot change it. Instructions for viewing are provided for you in the E-PAS system.

**C. PEER – FACULTY/STAFF EVALUATIONS (for other participating Staff)**

[See PowerPoint Presentation Slides #27-35]

1. The chosen Peers and/or Faculty/Staff need to access the E-PAS system, either through the link in the email notification or on the College website.
2. The staff member will login to the E-PAS system using his/her SID & PIN.
3. Once in the system, on the menu down the left-hand side, click on Peer Evaluation or Faculty/Staff Evaluation.
4. Choose the employee you are evaluating.
5. Fill out the Evaluation form. It includes its own set of instructions.
6. If you are unable to finish the evaluation, click on SAVE at the bottom of the form.
7. Once you are finished and are satisfied with it, you will SUBMIT the evaluation. This ends the process for the Peer and Faculty/Staff evaluators.

**D. EVALUATION STATUS/SENDING REMINDERS (for Supervisors)**

[See PowerPoint Presentation Slides #36-40]

1. The supervisor needs to check on the status of the evaluation process frequently to ensure the evaluation is completed in a timely manner.
2. Do this by signing into the E-PAS system and click on Evaluation Status on the menu down the left-hand side.
3. Put in the SID number of the employee you want to check on.
4. The next screen shows you the status of the Self Evaluation and all Peer and Faculty/Staff Evaluations.
5. If any have not been completed and you want to send a reminder, check the box in the left-hand side column of each one and click on SEND REMINDER.
6. Reminders can only be sent one time. After that you can remind the person by calling them or emailing them. If you have tried and the employee will not respond, you can delete them out of the evaluation process by clicking the red 'X' in the right-hand side column on the status page and click on ADD/REMOVE PEERS or ADD/REMOVE FACULTY/STAFF.
7. *NOTE: ALL Self, Peer and/or Faculty/Staff evaluations must be complete before the Evaluation Comments menu and the Formal Evaluation menu will appear in E-PAS.*

**E. EVALUATION COMMENTS/FORMAL EVALUATION – FINAL MEETING  
(for Supervisor/Employee) (See PowerPoint Presentation Slides #41-60)**

1. After all evaluations have been completed, the supervisor will need to review the Evaluation Comments and Finalize the Formal Evaluation. *These steps can be done with or without the employee.*
2. To print out a copy of the Evaluation Comments, the supervisor needs to login to the E-PAS system and click on Evaluation Comments on the menu down the left-hand side. *Again, ALL Peer and/or Faculty/Staff evaluations must be complete before the Evaluation Comments menu appears.*
3. Choose the appropriate employee.
4. This will bring up the Evaluation Comments. On the bottom of this screen, click on PRINT.
5. Once this is printed, click on Formal Evaluation on the menu down the left-hand side. *Again, ALL Self, Peer and/or Faculty/Staff evaluations must be complete before the Formal Evaluation Comments menu appears.*
6. Choose the appropriate employee.
7. This will bring up the Formal Evaluation form. The supervisor will need to go through the evaluation and mark the final ratings choices.
8. If you are unable to finish the Formal Evaluation or you do not want to finalize it until you have had a discussion with the employee, you *MUST* click SAVE at the bottom of the form before closing out of E-PAS. *If you do not, you will lose all of the information that was put into the form.*
9. If you want to print the form for review, prior to submitting it, you can. The signature page will not print out until the form has been finalized and submitted.
10. Once you are finished and are satisfied with it, you will SUBMIT the Formal Evaluation.
11. Click on Print the Formal Evaluation and Evaluation Summary.
12. Get the appropriate signatures on the form.
13. No copies need to be made as the Human Resource department will scan and send copies to both the supervisor and the employee.
14. The Human Resource department gets the original signed evaluation form.
15. The process is now complete.