

**PEMS
USER'S GUIDE**



Position, Performance & Employment Management System



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TABLE OF CONTENTS

INTRODUCTION

Your Web Browser	1
Important User Tips.....	1
Security of Data	1
Navigating in PPEMS	1
Required Fields	2
Pending Actions	2
Attaching Supplemental Documentation	3
User Types	5

GETTING STARTED

Logging in to PPEMS	7
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JOB QUESTIONNAIRE ACTIONS

Request to Reclassify a Job Questionnaire	8
Request to Reclassify a Job Questionnaire and Recruit.....	8
Request to Update/Review a Job Questionnaire	8
Request to Update/Review a Job Questionnaire and Recruit.....	8
Request to Establish a New Job Questionnaire.....	26
Request to Establish a New Job Questionnaire and Recruit	26
Request to Change Supervisory Reporting Relationship.....	31
Certify Employee Job Questionnaire/Establish Objectives	35
Your Job Questionnaire Library	42

PERFORMANCE EVALUATIONS

User Types for Performance Evaluations	43
Recommended Workflow	43
Starting the Performance Evaluation	44
Viewing Historical Evaluations	54

INTRODUCTION

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Welcome to the University of West Florida Online Position, Performance and Employment Management System (PPEMS). The Human Resources department has implemented this system in order to automate many of the tasks of the position, performance and employment process.

You will use this system to complete three main tasks:

- 1) Manage Job Questionnaires
- 2) Manage Performance Evaluations
- 3) Manage Recruitment Efforts

Your Web Browser

The PPEM System is designed to run in a web browser over the Internet. The system supports browser versions of Netscape 4.7 and above and Internet Explorer 4.0 and above. However some of the older browser versions are less powerful than newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please notify the system administrator of any significant issues that arise.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.



The site is best viewed in Internet Explorer 5.5 and above.

Important User Tips – What you need to know *before* you get started.

Security of Data

To ensure the security of the data, the system will automatically log you out after 60 minutes if it detects no activity. Therefore, anytime you leave your computer, we strongly recommend that you save any work in progress and log out of the system by clicking on the logout link located on the bottom left side of your screen.

Navigating


- Do not use your browser's **Back**, **Forward** or **Refresh** buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.



Required Fields

- Throughout the system, fields marked with an asterisk (*) are required and must be completed.
- If you attempt to continue to the next page without completing a required field, you will receive an error message in red text and the required fields with missing information will be highlighted in yellow.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points	HR Use Only
---------------	---------------------------	-------------------------	------------------	---------------------	----------------------	-----------------------	----------------------------	------------------	----------------------------	------------------------	-------------


⚠ This page has errors that must be corrected before you may continue. Please correct these errors before proceeding.

[<< RETURN TO PREVIOUS](#) [CONTINUE TO NEXT PAGE >>](#)

*Required information is denoted with an asterisk.


Employee First Name:

Employee Last Name:

UWF ID number:

Indicate Specifically how the duties of this position have changed:

* This is a required field. Please complete field before continuing.



Pending Actions/Search Actions

- **Pending Actions** under the Job Questionnaire menu only contains Job Questionnaires awaiting your review/approval. (This is your “Inbox”)
- **Search Actions** under the Job Questionnaire menu contains all Job Questionnaire actions for your area of responsibility, including pending actions that are awaiting review/approval from another user in your department/division.
- **Auto Emails** - The PPEMS system notifies users when a pending action has been sent from one user to another by sending an email to the receiving user.

View Pending Job Postings 

View Pending Job Questionnaire Actions 

View Pending Performance Evaluations 



Employment and Position Management

Welcome **Kimberly Keebler**. You are logged in as Carol Gentry.
Your Current Group: Supervisor.
Monday, April 7, 2008

Welcome to Position, Performance and Employment Management System

Faculty Hiring Guide
[View / Download](#)

Employee User Guide
[View / Download](#)

Hiring User Tutorial (Under Revision)
[View / Download](#)

Quick Tips for UWF Users:

- You may have multiple user types:** Go to Admin > Change User Type and select the appropriate user type > then click change group, the screen will automatically refresh.
- Employees:** Make sure that you are logged in as Employee User Type to complete your performance evaluation.
- Supervisors:** To view and complete employee performance evaluations > Make sure you are logged in as Supervisor User Type.
- All Users:** Anytime you start an action in the system and save it, in order to retrieve it you must go to pending either Job Questionnaires or Performance Evaluations.

Attaching Supplemental Documentation

Throughout the system, you may have the opportunity to attach documentation, such as organizational charts, memos, or other supporting documents. Documents will always be attached on the **Supplemental Documents** tab of your requested action.



Special Note: Your attachment must be an MS Word, MS Excel, or Adobe PDF document.

- Click on **Attach**

Supplemental Documents tab on the Job Questionnaire.

Supplemental Documents tab on the Performance Evaluation.

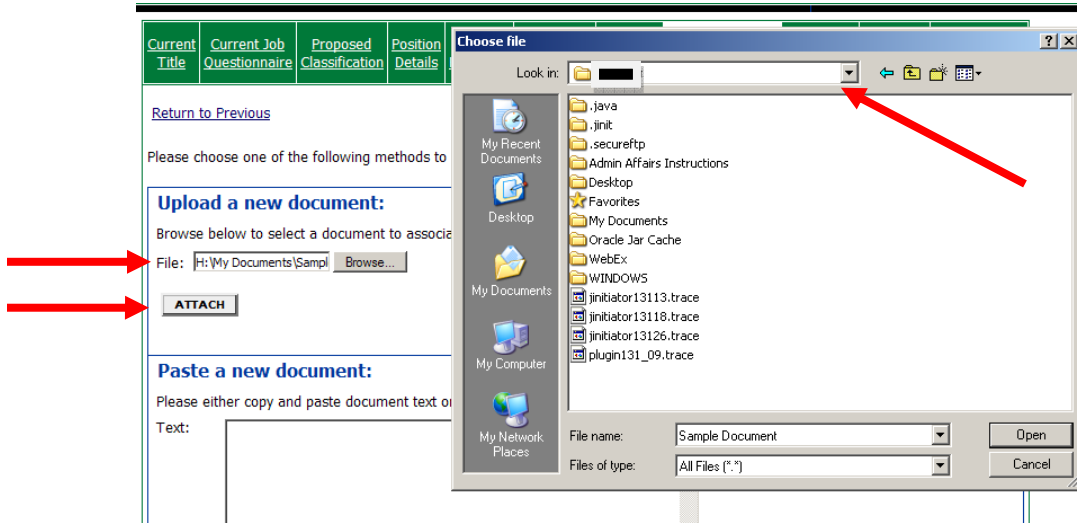
- Browse your computer for your document or copy text from another document and paste it into the “Paste a New Document” field.

Click Browse to locate a document to attach.

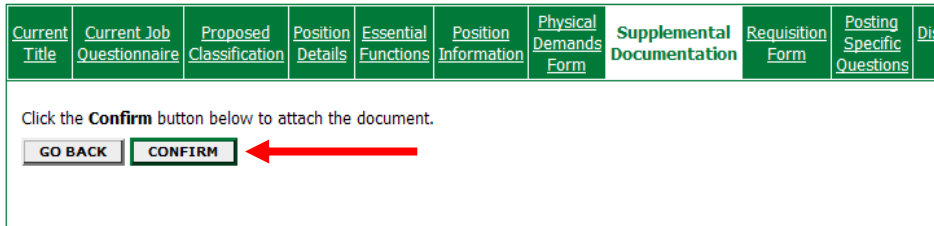
OR

Copy and Paste

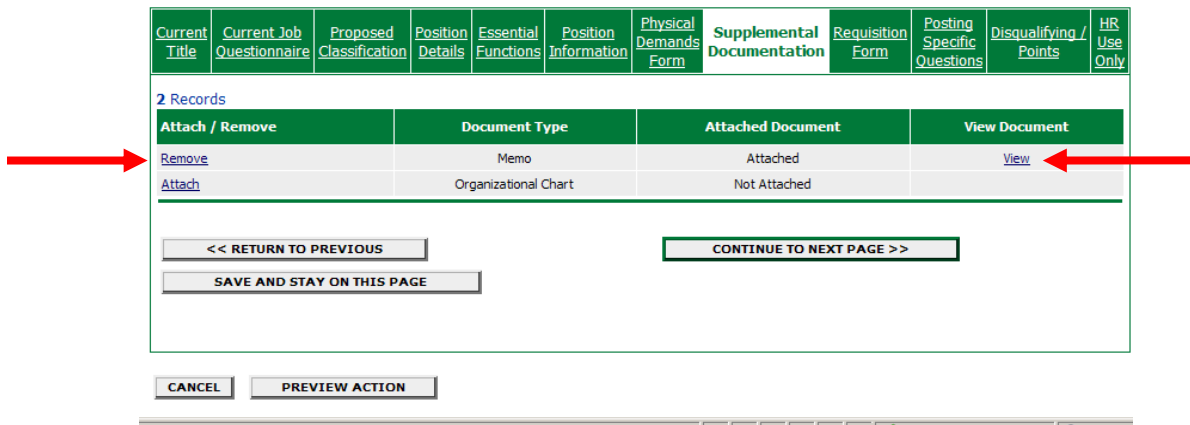
- Click on **Browse** -- a window will open up to allow you to locate your file.
- Double-click the file you want to attach. It will be listed in the **File** window.
- Click **Attach**.



- Click on **Confirm** to finish attaching the document.



- Your document is now attached and you may **View** it or **Remove** it by clicking on the appropriate links.



User Types

This system functions by user type. It is important for users to understand what role they will be taking when they login to PPEMS.

To change user types

1. Click on **Change User Type** on the left side of the screen.
2. Select the appropriate user type.
3. Click on **Change Group**.
4. You can verify what user type you are logged in as by looking at the top left-hand side of your screen.

The screenshot displays the 'Employment and Position Management' interface. On the left, a navigation menu is visible with 'CHANGE USER TYPE' highlighted, indicated by a red arrow and a box labeled '1'. The main content area shows a 'Welcome to Position, Performance and Employment Management System' message. At the top, a user notification states 'Welcome Kimberly Keebler. You are logged in. Your Current Group: Employee.', with a red arrow and box labeled '4' pointing to the group name. Below this, there are links for 'Faculty Hiring Guide', 'Employee User Guide', and 'Hiring User Tutorial'. The 'Change User Type' dialog box is open, showing a list of user types: 'Dean/Division Head', 'DeptHead', 'Supervisor', 'Employee', and 'Reviewing Officer'. The 'Employee' option is selected, indicated by a red arrow and box labeled '2'. Below the list, the 'CHANGE GROUP' button is highlighted with a red arrow and box labeled '3'. A 'CANCEL' button is also visible.

- **Employee User Type** – Select this user type to take action on your own job questionnaire or performance evaluation.
- **Supervisor User Type** – Select this user type to take action on a job questionnaire, recruitment effort, or performance evaluation on employees/positions who report directly to you.
- **Administrative User** Type – Select this user type to take action on job questionnaires and recruitment efforts on any position within your area of responsibility.

- **Eval Admin User** Type – Select this user type to perform **typing functions** only on performance evaluations for a supervisor within your area of responsibility.
 - This user type is assigned on a case-by-case basis and must be requested via email to Kay Larson at klarson@uwf.edu. This user type allows access to the performance evaluations of others and should be considered carefully before being requested.
- **Reviewing Officer** User Type – Select this user type to take action on a performance evaluation as the reviewing officer.
- **Department Head** User Type – Select this user type when you are completing any function as the department head for your area(s) of responsibility on job questionnaires and recruitment efforts. (Not for completing Performance Evaluations).
- **Dean/Division Head** – Select this user type when you are completing any function as the Dean or Division Head for your area(s) of responsibility on job questionnaires and recruitment efforts. (Not for completing performance evaluations).
- **Vice President** User Type – Select this user type when you are completing any function as the Vice President for your area(s) of responsibility on job questionnaires or recruitment efforts. (Not for completing performance evaluations).



Special Notes Regarding User Types

- There are only three (3) user types applicable to the **Performance Evaluation** piece: **Employee, Supervisor, and Reviewing Officer**. These are the electronic signatures required on performance evaluations; therefore, you will have to be logged in as one of these user types to complete the performance evaluation process.
- **What user type should I choose?** When trying to decide which user type to choose, try to think about what signature you would be putting on the document. Will it be a department head signature, a dean signature, a vice president signature? Will it be an employee signature, a supervisor signature, a reviewing officer signature? This will help you determine which user type you will choose.

GETTING STARTED

Logging in to PPEMS: Login to Argus, go to the Directory (Services) tab, click on “H” for Human Resources, and click on Position, Performance, and Employment Management or go to the My Info Tab and select Access my Performance Evaluation and Job Questionnaire.

The **Welcome Screen** appears after you log in, and should appear similar to the following screen:

Job Questionnaire Actions

.....

Job Questionnaire options are broken down into different Actions in the online system as follows.

- Request to Establish a New Job Questionnaire and Recruit
- Request to Establish a New Job Questionnaire
- Request to Reclassify a Job Questionnaire and Recruit
- Request to Reclassify a Job Questionnaire
- Request to Update/Review a Job Questionnaire and Recruit
- Request to Update a Job Questionnaire
- Request to Change Supervisory Reporting Relationship
- Certify Employee Job Questionnaire/Establish Objectives

Instructions on how to complete the following Job Questionnaire actions:

- Request to Reclassify a Job Questionnaire
- Request to Reclassify a Job Questionnaire and Recruit
- Request to Update/Review a Job Questionnaire
- Request to Update/Review a Job Questionnaire and Recruit

- 1) Login to PPEMS.
- 2) Select the appropriate user type. (see **User Types** for more information)

Note: These actions can be started by any of the following user types:

- Administrative User
- Eval Admin User
- Supervisor
- Department Head
- Dean/Division Head
- Vice President
- Employee – this user type can only begin the “Request to Reclassify a Job Questionnaire” and the “Request to Update/Review a Job Questionnaire.” They cannot request to recruit.

3) Click on **Begin New Action** under the Job Questionnaire Menu.

The screenshot shows the 'Employment and Position Management' interface. The left navigation menu includes sections for 'JOB QUESTIONNAIRES', 'EVALUATIONS', and 'ADMIN'. Under 'JOB QUESTIONNAIRES', the 'BEGIN NEW ACTION' link is highlighted with a red arrow. The main content area displays a welcome message for Kimberly Keebler, a date of Tuesday, March 11, 2008, and a title 'Welcome to Position, Performance and Employment Management System'. Below this are links for 'Faculty Hiring Guide', 'Staff Hiring Guide (Under Revision)', and 'Hiring User Tutorial (Under Revision)'. A 'Quick Tips for UWF Users' section follows, providing instructions for multiple user types, employees, and supervisors.

4) Select the action you want to take and click on **Start Action**. For this example, we will be using the Request to Reclassify a Job Questionnaire and Recruit action; however, these instructions are applicable to all four of the actions outlined above, with a few exceptions that are specifically noted in this manual.

Begin New Action	
8 Records	
Action	Description
Request to Establish a New Job Questionnaire and Recruit Start Action	Action A: Use this action to request to establish a new position and recruit for the position once approved
Request to Establish a New Job Questionnaire Start Action	Action B: Use this action to request to establish a new position only.
Request to Reclassify a Job Questionnaire and Recruit Start Action	Action C: Use this action to request a reclassification of an existing position and recruit for the position.
Request to Reclassify a Job Questionnaire Start Action	Action D: Use this action to request a reclassification of an existing position.

- 5) Search for the position you wish to take action on. You may enter search criteria in one or more of the search fields OR you may simply click on **Search** to bring up positions you are responsible for or that are assigned to your department.



Search Tip: The more search criteria you enter, the more difficult it will be for the system to locate the position you are searching for, as it will be looking for an exact match of the criteria you have entered. Less is better.

Recommended: Enter the **Last Name** and click on **Search**.

Request to Reclassify a Job Questionnaire and Recruit

Important Note:

Employees: If you are searching for your own performance evaluations or job questionnaire simply click on the search button. It is not necessary to enter any information in the search fields that are located on this page.

Supervisors: If you are searching for an employee performance evaluation or job questionnaire you can either enter information into a specific search field or click the search button at the bottom and it will bring up all employees assigned to the department and you can select the employee from that point.

Search Job Questionnaires to Begin Action On

Employee Last Name: Position Number:

Employee First Name: Working Title:

UWF ID number: Position Title:

SEARCH **CLEAR RESULTS**

CANCEL ACTION

- 6) Click on **Start Action** on the job questionnaire you wish to take action on. **Caution:** You can only have 1 open action on a Job Questionnaire at a time. Please make sure you begin and receive approval from HR on the most important action you need to accomplish first. If you receive the error message below, it means you have already begun another action on this job questionnaire that must be completed before you may begin another. Contact Human Resources for more information on your outstanding action.

Choose Job Questionnaire to Begin Action On					
Classification Title	Working Title	Class Code	Position Number	Employee Last Name	Last Action
Human Resources Specialist		1012			Job Questionnaire Approved
Start Action	View Summary				

⚠ This Position has an outstanding Action that must be completed before any new Actions may take place.

Choose Job Questionnaire to Begin Action On					
Classification Title	Class Code	Position Number	Employee First Name	Employee Last Name	Last Action
Office Specialist	0102				Job Questionnaire Approved
Start Action	View Summary				View History

- The job questionnaire will open as shown below. The green bar across the top contains **Tabs** or pages of the job questionnaire.
- The first two tabs **are not** editable. They display the **Current Title** and the **Current Job Questionnaire** and are viewable only.
- Click on **Continue to Next Page** until you come to the **Proposed Classification** tab.

7) **Proposed Classification** tab: Click on **Change Classification** where you will search for the proposed classification title.



Note: The **Proposed Classification** tab only exists on the **Request to Reclassify** action. You will not have this tab on a **Review/Update** action. If you are doing a Review/Update Job Questionnaire (and Recruit), skip to #10 of these instructions.

- For your convenience, there is a link to the **Position Specifications** for each classification title.

The screenshot shows a web application interface with a green header bar containing several tabs: **Current Title**, **Current Job Questionnaire**, **Proposed Classification**, **Position Details**, **Essential Functions**, **Position Information**, **Physical Demands Form**, **Supplemental Documentation**, **Requisition Form**, **Posting Specific Questions**, and **Disqualifying / Points**. A red arrow points to the **Proposed Classification** tab, labeled "Tabs".

Below the tabs, there is a link for **Position Specifications**, also indicated by a red arrow labeled "Position Specifications".

The **Position Specifications** section contains a table with the following details:

Title Details	
Position Title:	Human Resources Specialist
Position Class Code:	1012
Pay Band:	Professional
EClass Description:	30-University Work Force Ex FT
EEO Skill:	30 Other Professionals
FLSA:	Exempt
Minimum Qualifications:	A bachelor's degree in an appropriate area of specialization and three years of appropriate experience; or a high school diploma and seven years of appropriate experience. Appropriate college coursework may substitute at an equivalent rate for the required experience.

At the bottom of the interface, there are three buttons: **CHANGE CLASSIFICATION**, **<< RETURN TO PREVIOUS**, and **CONTINUE TO NEXT PAGE >>**. A red arrow points to the **CONTINUE TO NEXT PAGE >>** button.

The footer of the page reads: "Job Questionnaire Actions [Compatibility Mode] - Micro"

- 8) You can search for the appropriate classification by **Class Code OR Position Title**. We recommend you search by Position Title by clicking on the down arrow, selecting the appropriate position title, and click on **Search**.

- You may **View Summary** to review this classification or you can **Select and Continue**. You may also search again to search for a different classification title.

→Click on **Select and Continue**.

- 9) You now have populated the proposed classification with the minimum qualifications for this position title.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points
Title Details										
Position Title:			Accountant							
Position Class Code:			1427							
Pay Band:			Professional							
EClass Description:			32-University Work Force NE FT							
EEO Skill:			30 Other Professionals							
FLSA:			Non Exempt							
Minimum Qualifications:			A bachelor's degree in an appropriate area of specialization; or a high school diploma and four years of appropriate experience. Appropriate college coursework or vocational/technical training may substitute at an equivalent rate for the required experience.							
<input type="button" value="CHANGE CLASSIFICATION"/>										
<input type="button" value=" << RETURN TO PREVIOUS"/> <input type="button" value=" CONTINUE TO NEXT PAGE >>"/>										
<input type="button" value="SAVE AND STAY ON THIS PAGE"/>										

→Click on **Continue to Next Page**.

- 10) **Position Details** tab: Carefully review each field and enter/edit the appropriate information.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points
<input type="button" value=" << RETURN TO PREVIOUS"/> <input type="button" value=" CONTINUE TO NEXT PAGE >>"/>										
<p>*Required information is denoted with an asterisk.</p>										
Employee First Name:			<input type="text"/>							
Employee Last Name:			<input type="text"/>							
UWF ID number			<input type="text"/>							
* Indicate Specifically how the duties of this position have changed:			<input type="text" value="Additional duties . . ."/>							
Proposed Position Title:			<input type="text"/>							
If Position Title is Undecided, please enter Proposed Position Title:			<input type="text"/>							
Proposed Working Title:			<input type="text" value="Office Specialist"/>							
Proposed Class Code:			<input type="text"/>							

**Special Note:**

- **Supervisor 2** and **Supervisor 3** – these fields may contain the names of mid-level supervisors who exist between the immediate supervisor and the department head, dean, division/head, or VP. These fields are optional.

→Click on **Continue to Next Page**.

11) Essential Functions tab: Here you will list the essential functions of the position.

- List the essential functions in order of importance.
- Enter the percentage of time spent on each function. Total percentage of all essential functions should add up to 100%. This will total automatically as you build your essential functions.
- If possible, please do not list essential functions that total less than 5% of time spent. You may group together essential functions of less than 5% into one entry.

→Click on **Add New Entry** to begin building your essential functions.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points
<p>On this screen, please list in order of importance, and in detail, the major responsibilities and duties assigned to this position and estimate the percentage of time given to each function.</p> <p>To begin entering each individual duty, click the Add New Entry button. Enter each percent of time and duty, and click the Add Entry button. Percentages must add up to 100%.</p> <p>You may copy and paste from another document. Do not include duties which constitute less than 5%.</p> <p>To edit an existing entry, click the Edit link. To delete an entry, click the Delete link. To add a new Entry, click the Add New Entry button below. To view more details about an existing entry, click the View link for the entry. To edit an existing entry, click the Edit link for that entry. To delete an existing entry, click the Delete link for that entry.</p>										
<div style="border: 1px solid black; padding: 2px; display: inline-block;">ADD NEW ENTRY</div>										
Existing Entries										
Percent of Duty Total: 100										
2 Records										
▼ % of Time	▼ Responsibility / Duty									
75	Assists Hiring Official in creating job requisition on the People Admin. system. Advises hiring and administrative users of specific rules i.e. veterans preference, background screening, minimum qualifications, how to write job summaries, preferred qualifi									
25	Coordinates the annual law enforcement test distribution; this includes serving as contact person, determine employees eligibility, preparing and submitting list to test administration. Arranges for appointees requiring a physical examination advising the									

Add New Entry
To add a new entry, complete the following fields and then click the **Add Entry** button. If you do not wish to add a new entry, click the **Cancel** button.

*Required information is denoted with an asterisk.

* Percent of total time:
Must add up to 100%

* Responsibility:

ADD ENTRY
CANCEL

- When you are finished building the essential functions . . .

→Click on **Continue to Next Page**.

12) Position Information tab: This tab will open the job questionnaire for editing. You only have to revise or complete the areas that require changes or information.



Special Notes about this page:

- The **Job Summary** Field will be viewable by applicants if/when a recruitment effort is conducted for the position. Take special care in writing the job summary.
- The **Minimum Qualifications** will not be editable. These are set by the class specifications for the position.
- The **Preferred Qualifications** will be viewable by applicants if/when a recruitment effort is conducted for this position. This will also be the **selection criteria** for the recruitment effort.

Edit only the areas that require revising. All other data will be preserved.

<< RETURN TO PREVIOUS

CONTINUE TO NEXT PAGE >>

*Required information is denoted with an asterisk.

* Job Summary: Please summarize the position in a few sentences. (This will be viewable by Applicants)
Records manager in charge of managing the maintenance of the university's personnel files.
-Public records manager in charge of providing personnel information requested through the General Counsel's office or

Marginal Functions:
(The job should still exist if the duty was not performed.) Please indicate those job functions that need to be performed infrequently, and have minimal consequence to the mission of the job if performed by another person.
None

* Position Qualifications:
(What knowledge, skills, and abilities are required?)
Must have knowledge of State statutes and university policies, rules and procedures for interpretation to university staff and or others. Must have knowledge of public records laws and use mature judgment when

Internet

→Click on **Continue to Next Page**.

13) Physical Demands Form tab:

Carefully rate each physical demand for the position by selecting the appropriate level of frequency.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions																																																						
<input style="border: 1px solid black;" type="button" value=" << RETURN TO PREVIOUS "/> <input style="border: 1px solid black;" type="button" value=" CONTINUE TO NEXT PAGE >> "/>																																																															
<p style="color: red;">*Required information is denoted with an asterisk.</p> <table border="1"> <tbody> <tr> <td>Standing:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Walking:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Sitting:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Reaching with hands and arms:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Climbing or Balancing:</td> <td><input type="radio"/> Never</td> <td><input checked="" type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Stooping, kneeling, crouching or crawling:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Use hands to handle objects:</td> <td><input type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input checked="" type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Lifting up to 10 pounds:</td> <td><input type="radio"/> Never</td> <td><input checked="" type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> <tr> <td>Lifting up to 25 pounds:</td> <td><input checked="" type="radio"/> Never</td> <td><input type="radio"/> Occasionally</td> <td><input type="radio"/> Frequently</td> <td><input type="radio"/> Daily</td> <td><input type="radio"/> N/A</td> </tr> </tbody> </table>										Standing:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Walking:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Sitting:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Reaching with hands and arms:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Climbing or Balancing:	<input type="radio"/> Never	<input checked="" type="radio"/> Occasionally	<input type="radio"/> Frequently	<input type="radio"/> Daily	<input type="radio"/> N/A	Stooping, kneeling, crouching or crawling:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Use hands to handle objects:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A	Lifting up to 10 pounds:	<input type="radio"/> Never	<input checked="" type="radio"/> Occasionally	<input type="radio"/> Frequently	<input type="radio"/> Daily	<input type="radio"/> N/A	Lifting up to 25 pounds:	<input checked="" type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input type="radio"/> Daily	<input type="radio"/> N/A
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Stooping, kneeling, crouching or crawling:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A																																																										
Use hands to handle objects:	<input type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input checked="" type="radio"/> Daily	<input type="radio"/> N/A																																																										
Lifting up to 10 pounds:	<input type="radio"/> Never	<input checked="" type="radio"/> Occasionally	<input type="radio"/> Frequently	<input type="radio"/> Daily	<input type="radio"/> N/A																																																										
Lifting up to 25 pounds:	<input checked="" type="radio"/> Never	<input type="radio"/> Occasionally	<input type="radio"/> Frequently	<input type="radio"/> Daily	<input type="radio"/> N/A																																																										

→Click on **Continue to Next Page**.

14) Supplemental Documentation tab:

- Click on **Attach** to attach any supplemental documentation. For detailed instructions on how to attach documents, see **Important User Tips**.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points												
<p>2 Records</p> <table border="1"> <thead> <tr> <th>Attach / Remove</th> <th>Document Type</th> <th>Attached Document</th> <th>View Document</th> </tr> </thead> <tbody> <tr> <td>Attach</td> <td>Memo</td> <td>Not Attached</td> <td></td> </tr> <tr> <td>Attach</td> <td>Organizational Chart</td> <td>Not Attached</td> <td></td> </tr> </tbody> </table>											Attach / Remove	Document Type	Attached Document	View Document	Attach	Memo	Not Attached		Attach	Organizational Chart	Not Attached	
Attach / Remove	Document Type	Attached Document	View Document																			
Attach	Memo	Not Attached																				
Attach	Organizational Chart	Not Attached																				
<input style="border: 1px solid black;" type="button" value=" << RETURN TO PREVIOUS "/>		<input style="border: 1px solid black;" type="button" value=" CONTINUE TO NEXT PAGE >> "/>																				
<input style="border: 1px solid black;" type="button" value=" SAVE AND STAY ON THIS PAGE "/>																						

→Click on **Continue to Next Page**.



If you did not request an action that includes recruitment, you may skip to #18.

15) Requisition Form tab: If you have chosen an action that also requests to **Recruit** you will now be at the Requisition Form tab. This is where you will complete information related to the recruitment of the position.



Special Notes about this page:

- **Pay Range** – please indicate a pay range, for example \$24,000 - \$28,000. Only professional level positions may list “Commensurate with education and experience.” Departments may contact Human Resources for guidance with salary ranges.
 - **Please note** – you will be required to hire within the salary range advertised.
- **Job Close Date** or **Preferred Response Date** – the **Job Close Date** is the date that the advertisement will close and be removed from the university’s online jobsite. The **Preferred Response Date** will be used only when advertising “Open Until Filled.” The Preferred Response Date is the date that you are indicating applicants should apply by; however, the advertisement will remain posted until you request that it be closed.
 - You should only choose one option – either “job close date” or “preferred response date.”
 - Applicant pools are reviewed for approval by HR upon the “job close date” or “preferred response date.”

* Job Open Date:	<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY
* Job Close Date:	<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY
Preferred Response Date (For positions that are open until filled):	<input type="checkbox"/> Open Until Filled	<input type="text"/>

- **Contact Person** – Indicate the point of contact for the job posting.
- **Search Committee Members** - please include name, title, and department for each member.
- **Special Instructions** – list any special instructions to your applicants here, such as mailing information or attachment requirements.

- **Documents which can be associated with this posting or Documents that must be associated with this posting** – check off documents you want to have attached by the applicants. You may **require** documents or you may indicate **optional** documents. Make sure you are clear on which are required and which are optional by placing check marks in the appropriate documents list.

Optional documents

→

Required documents

→

Documents which can be associated with this posting	<input type="checkbox"/> Letter of Recommendation <input type="checkbox"/> Letter of Recommendation 2 <input type="checkbox"/> Letter of Recommendation 3 <input type="checkbox"/> License <input type="checkbox"/> List of References <input type="checkbox"/> Other Documents <input type="checkbox"/> Statement of Teaching Philosophy <input type="checkbox"/> Transcript <input type="checkbox"/> Transcript 2 <input type="checkbox"/> Transcript 3
Documents that must be associated with this posting	Check All Clear All <input type="checkbox"/> Resume <input type="checkbox"/> Cover Letter <input type="checkbox"/> Curriculum Vitae <input type="checkbox"/> Letter of Application/Interest <input type="checkbox"/> Letter of Recommendation <input type="checkbox"/> Letter of Recommendation 2 <input type="checkbox"/> Letter of Recommendation 3 <input type="checkbox"/> License <input type="checkbox"/> List of References <input type="checkbox"/> Other Documents <input type="checkbox"/> Statement of Teaching Philosophy <input type="checkbox"/> Transcript

→Click on **Continue to Next Page**.

16) Posting Specific Questions tab:

- You may add questions that will be asked of every applicant who applies to your position. **Note:** Adding Questions is **optional**. If you do not want to add questions, click on *Continue to Next Page*.
- Click on **Add a Question**.

→

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points	HR Use Only
<p>To add questions that will be asked of every applicant who applies to this position, click the Add a Question button. Click the Continue to Next Section button to skip this section or when finished.</p> <p>No Posting Specific Questions exist.</p> <p>ADD A QUESTION</p> <p><< RETURN TO PREVIOUS</p> <p>CONTINUE TO NEXT PAGE >></p> <p>SAVE AND STAY ON THIS PAGE</p> <p>CANCEL PREVIEW ACTION</p>											

- You can **Search by Keyword** for an existing question in the database by entering a key word, such as “Microsoft Word,” or you can **Create a Question**.

Add a Question

Search Existing Questions:

Search by Keyword:

[Create a Question](#)

- Search by Keyword** – All previously established questions with the keywords will be listed in the Search Results.
- You may click on **View/Add** to view the question and the possible responses.

Add a Question

Search Existing Questions:

Search by Keyword:

Search Results

21 Records

Question Text	
How many years experience do you have using Microsoft Word?	View/Add
How many years experience do you have using Microsoft Word in an office env...	View/Add
How would you describe your skill level in the use of Microsoft Word?	View/Add
Do you have at least one year of work experience with Microsoft Word or Co...	View/Add

- Click on **Add This Question** to add the question or click on **Return to Search** to look at other questions.

[Return to Search](#)

Question

How many years experience do you have using Microsoft Word?

Closed-Ended Response Options

Display No Response As:

Possible Responses (up to 7):

- None
- Less than one year
- 1 - 2 Years
- 2 - 3 Years
- 3 - 4 Years
- 4 - 5 Years
- 5 + Years

Request to Reclassify a Job Questionnaire and Recruit Action

- Once you have added the question, you may add another question, delete this question, and / or continue to the next page.
- To **Delete** the question, check the box next to the question and click on **Delete Question**. To add another question, click on **Add A Question**.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying Points	HR Use Only
---------------	---------------------------	-------------------------	------------------	---------------------	----------------------	-----------------------	----------------------------	------------------	----------------------------	----------------------	-------------

To add questions that will be asked of every applicant who applies to this position, click the **Add a Question** button. Click the **Next Section** button to skip this section or when finished.

Posting Specific Questions

To delete, check the box of the question(s) you wish to delete, then click the **Delete Question(s)** button below.

Do you have work experience using Microsoft Office products? (Word, Excel, Access, Publisher, Outlook)

ANSWER

No Response
Yes
No

Is this question required? Required Not Required

DELETE QUESTION(S) **ADD A QUESTION**

<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>

- **Create a Question** – you can create your own question. Click on **Add a Question**.

Current Title	Current Job Questionnaire	Proposed Classification	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying Points	HR Use Only
---------------	---------------------------	-------------------------	------------------	---------------------	----------------------	-----------------------	----------------------------	------------------	----------------------------	----------------------	-------------

To add questions that will be asked of every applicant who applies to this position, click the **Add a Question** button. Click the **Continue to Next Section** button to skip this section or when finished.

No Posting Specific Questions exist.

ADD A QUESTION

<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>

SAVE AND STAY ON THIS PAGE

CANCEL PREVIEW ACTION

- Click on **Create a Question**.

Add a Question

Search Existing Questions:

Search by Keyword:

SEARCH **CANCEL**

[Create a Question](#)

- Enter your question in the text box.
- Select your **Answer Type**
 - **Closed Ended** - you will provide a list of possible answers like in the example below; or
 - **Open Ended** – applicants will have a text box to answer your question. We recommend you select **Long Text** for open-ended answers to provide the applicant with ample space to answer the question.

Create a Question [Create Question Help](#)

Question

Please enter question text:
Please indicate your skill level using Microsoft Access.

Please select answer type:
 Closed-Ended (e.g. Do you have experience working in an office environment?)
 Open-Ended (e.g. Describe any work experience relevant to this Posting.)

Closed-Ended Answers	Open-Ended Answers
Display No Response As: No Response	Open-Ended Answer Type: <input checked="" type="radio"/> None <input type="radio"/> Short Text (Text < 50 characters) <input type="radio"/> Long Text (Text > 50 characters) <input type="radio"/> Phone <input type="radio"/> Date
Possible Responses (up to 7): 1. None 2. Beginner 3. Intermediate 4. Advanced	

Enter your question here. →

Closed-Ended: Type the possible responses to your question here. →

Open-Ended: Choose Long Text here. →

- Click **Submit Question** to add your question.

Please enter question text:
Please describe your skill level using Microsoft Access.

Please select answer type:
 Closed-Ended (e.g. Do you have experience working in an office environment?)
 Open-Ended (e.g. Describe any work experience relevant to this Posting.)

Closed-Ended Answers	Open-Ended Answers
Display No Response As: No Response	Open-Ended Answer Type: <input checked="" type="radio"/> None <input type="radio"/> Short Text (Text < 50 characters) <input type="radio"/> Long Text (Text > 50 characters) <input type="radio"/> Phone <input type="radio"/> Date
Possible Responses (up to 7): 1. None 2. Beginner 3. Intermediate 4. Advanced 5. 6. 7.	

SUBMIT QUESTION **CANCEL**

→

Request to Reclassify a Job Questionnaire and Recruit Action

- Your question(s) will be displayed. When you are finished creating your questions, you may add additional questions, delete questions, or continue to next page. You may also edit questions you have created by clicking on the **edit link** at the end of your question. **Note:** You can only edit questions YOU have created. Questions that you select from the database cannot be edited.

Note: To Delete question, check box and click Delete Question.

The screenshot shows a web interface for managing job questions. At the top, there is a navigation menu with tabs: Title, Questionnaire, Classification, Details, Functions, Information, Form, Documentation, Form, and Questions. Below the menu, a green header reads 'Posting Specific Questions'. The main content area contains a list of questions. The first question is 'Please describe your skill level using Microsoft Access. (Edit)'. To the left of this question is a checkbox. Below the question text is an 'ANSWER' section with radio button options: 'No Response', 'None', 'Beginner', 'Intermediate', and 'Advanced'. At the bottom of the question entry is a label 'Is this question required?' with two radio buttons: 'Required' (selected) and 'Not Required'. Below the question list are three buttons: 'DELETE QUESTION(S)', 'ADD A QUESTION', and 'CONTINUE TO NEXT PAGE >>'. At the very bottom are two more buttons: '<< RETURN TO PREVIOUS' and 'SAVE AND STAY ON THIS PAGE'. Red arrows point from a note box on the left to the checkbox, the 'DELETE QUESTION(S)' button, and the 'CONTINUE TO NEXT PAGE >>' button.

→Click on **Continue to Next Page.**

17) Disqualifying/Points tab:

- On this page, you may assign points to answers that may be used to **score** applicants.
- You may also designate an answer as a **disqualifying** answer. Applicants who select a disqualifying answer will be automatically moved to a status of not hired with a reason of *did not meet minimum qualifications*.

**Special Notes** about this page:

- Be careful about marking an answer as a disqualifier. You do not want to eliminate too many applicants from your applicant pool. It is recommended that you only select **disqualifying** if the answer/skill set is significant enough to disqualify the applicant from being in the applicant pool.
- Open-ended questions will not be visible on this tab, but will be visible on the summary page.
- When you are finished adding points, click **Recalculate** to total the maximum points possible.
- This page is **optional**. If you do not want to add points and / or do not want to select any disqualifying answers, you may continue to next page.

Maximum Points Possible: 15

Posting Specific Questions

Please describe your skill level using Microsoft Access.

ANSWER	DISQUALIFYING	SCORE
No Response	<input type="checkbox"/>	0
None	<input checked="" type="checkbox"/>	0
Beginner	<input type="checkbox"/>	5
Intermediate	<input type="checkbox"/>	10
Advanced	<input type="checkbox"/>	15

100 %

RECALCULATE RESET

<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>

SAVE AND STAY ON THIS PAGE

→ Add points



Don't forget to click **Save and Stay on this Page** as you complete your document to save your work.

→Click on **Continue to Next Page**.

18) Congratulations! You have completed all pages of the Job Questionnaire Action request. On this page you can . . .

- **Save without Submitting** if you are not ready to route the request to the next approval level; or
- Select the next appropriate approval level and click **Continue**.



How do you know where to send it to next? This is an electronic approval process. You will send it to the next level of authorization in your reporting structure. Ask yourself, "What is the next signature required on this request"? This is where you send the request.

If you **Send to Human Resources** without obtaining all appropriate approvals, HR will route the request to the appropriate user to obtain the required approvals.

The screenshot shows the 'Request to Reclassify a Job Questionnaire and Recruit Summary' page. The left sidebar contains navigation links for Job Postings, Create Requisition, Job Questionnaires, and Admin. The main content area has a title, instructions, and an 'Action Status' section with radio button options: Send to Supervisor (selected), Send to Supervisor 2, Send to Supervisor 3, Send to Department Head, Send to Sponsored Research, Send to Dean/Division Head, Send to Vice President, Save Action Without Submitting, and Send to Human Resources. Below the options are 'CANCEL' and 'CONTINUE' buttons. A callout box points to these options with the text: 'Select the next authorization required for your request OR save without submitting. Click **Continue**'. Below the 'Action Status' is the 'Current Title' section with fields for Position Title, Position Class Code (9297), Pay Band (Administrative/Managerial), EClass Description (30-University Work Force Ex FT), EEO Skill (10 Administrative/Managerial), FLSA (Exempt), and Minimum Qualifications. Another callout box points to this section with the text: 'On this page, you can also scroll through the entire job questionnaire and recruitment request to view your work in its entirety.' Below 'Current Title' is the 'Position Details' section with fields for Employee First Name, Employee Last Name, and UWF ID number.

- Select the appropriate status and click on **Continue**.
- Click on **Confirm** to confirm your **Change Action Status**.



You must click on **Confirm** to complete the action.

- You will be returned to the **Search Actions** screen with a message informing you that you have successfully completed the action you requested.

Remember!

Users may locate any Action that has been sent to them or saved by them in the system by clicking on "Pending Actions" under the Job Questionnaire menu.

Instructions on completing the following Job Questionnaire actions:

- Request to Establish a New Job Questionnaire
- Request to Establish a New Job Questionnaire and Recruit

- 1) Login to PPEMS.
- 2) Select the appropriate user type. (see User Types for more information)

Note: These actions can be started by any of the following user types:

- Administrative User
- Eval Admin User
- Supervisor
- Department Head
- Dean/Division Head
- Vice President

- 3) Click on **Begin New Action** under the Job Questionnaire Menu.



- 4) Select the action you want to take and click on **Start Action**. For this example, we will be using the **Request to Establish a New Job Questionnaire and Recruit** action; however, these instructions are applicable to both of the actions listed above.

Begin New Action	
Action	Description
Request to Establish a New Job Questionnaire and Recruit Start Action	Action A: Use this action to request to establish a new position and recruit for the position once approved
Request to Establish a New Job Questionnaire Start Action	Action B: Use this action to request to establish a new position only.
Request to Reclassify a Job Questionnaire and Recruit Start Action	Action C: Use this action to request a reclassification of an existing position and recruit for the position.

The job questionnaire will open as shown below. The green bar across the top contains **Tabs** or pages of the job questionnaire.

5) **Proposed Classification** tab:

- Search for the appropriate classification by **Class code OR Position Title**. We recommend you search by Position Title by clicking on the down arrow, selecting the appropriate position title, and click on **Search**.
 - If you are not sure which title to choose, you may choose **Undecided**.
- For your convenience, there is a link to the **Position Specifications** for each classification title.

Request to Establish a New Job Questionnaire and Recruit

Proposed Classification	Copy Job Questionnaire	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points
-------------------------	------------------------	------------------	---------------------	----------------------	-----------------------	----------------------------	------------------	----------------------------	------------------------

[Position Specifications](#)

Search Titles

Position Class Code: Position Title:

- You may **View Summary** to review this classification or you can **Select and Continue**. You may also search again to search for a different classification title.

Choose Classification to Assign

You may associate this Job Questionnaire with one of the titles below by choosing the **Select Title and Continue** link directly below the title you choose.

1 Record

Classification Title	Class Code
Human Resources Specialist Select and Continue View Summary	1012

Search Titles

Position Class Code: Position Title:

- Click on **Select and Continue**.

- You now have populated the proposed classification with the minimum qualifications for this position title. You may keep this classification and continue to the next page or you may click on **Change Classification** to search for a different classification title.

Proposed Classification	Copy Job Questionnaire	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points
Title Details									
Position Title:	Human Resources Specialist								
Position Class Code:	1012								
Pay Band:	Professional								
EClass Description:	30-University Work Force Ex FT								
EEO Skill:	30 Other Professionals								
FLSA:	Exempt								
Minimum Qualifications:	A bachelor's degree in an appropriate area of specialization and three years of appropriate experience; or a high school diploma and seven years of appropriate experience. Appropriate college coursework may substitute at an equivalent rate for the required experience.								
<input type="button" value="CHANGE CLASSIFICATION"/> <input type="button" value="CONTINUE TO NEXT PAGE >>"/> <input type="button" value="SAVE AND STAY ON THIS PAGE"/>									

→ Click on **Continue to next Page.**

6) **Copy Job Questionnaire** tab: This tab allows you to copy an existing job questionnaire from within your department. Copying a JQ is optional. If you do not want to copy a job questionnaire, click on **Do Not Copy JQ, Continue to Next Page.**

- To copy a job questionnaire, search for the job questionnaire you want to copy. You may enter search criteria in one or more of the search fields **OR** you may simply click on **Search** to bring up positions assigned to your department.



Search Tip: The more search criteria you enter, the more difficult it will be for the system to locate the job questionnaire you are searching for, as it will be looking for an exact match of the criteria you have entered. Less is better.

Recommended: Enter the employee's **Last Name** of the JQ you wish to copy and click on **Search.**

Proposed Classification	Copy Job Questionnaire	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Post Spec Quest
Search Job Questionnaires to Copy								
Employee Last Name	<input type="text"/>	Position Number	<input type="text"/>					
Employee First Name	<input type="text"/>	UWF ID number	<input type="text"/>					
Position Title:	Any <input type="text"/>							
<input type="button" value="SEARCH"/> <input type="button" value="CLEAR RESULTS"/>								
<input type="button" value="DO NOT COPY JQ, << RETURN TO PREVIOUS"/> <input type="button" value="DO NOT COPY JQ, CONTINUE TO NEXT PAGE >>"/> <input type="button" value="SAVE AND STAY ON THIS PAGE"/>								

Click on **Do Not Copy JQ, Continue to Next Page** if you do not want to copy another JQ.

- The result(s) of your search will be displayed as shown below. You can **View Summary** to review the details of the job questionnaire, **Search** again to change the results of your search, choose to **not copy a JQ**, or **select** a job questionnaire to copy.
- Click on **Select and Continue** under the appropriate title to copy the job questionnaire.

Choose Job Questionnaire to Copy

1 Record

Classification Title	Class Code	Position Number	Employee Last Name	Last Action
Coordinator Select and Continue	9225			Job Questionnaire Template in System (Needs Update)

Search Job Questionnaires to Copy

Employee Last Name: Position Number:

Employee First Name:

Position Title:

UWF ID number:

7) **Position Details** tab: Carefully review each field and enter/edit the appropriate information.

Remember: Fields marked with an asterisk (*) are required and must be completed.

Proposed Classification	Copy Job Questionnaire	Position Details	Essential Functions	Position Information	Physical Demands Form	Supplemental Documentation	Requisition Form	Posting Specific Questions	Disqualifying / Points																				
		<p><< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >></p> <p>*Required information is denoted with an asterisk.</p> <table border="1"> <tr> <td>Proposed Position Title:</td> <td>Human Resources Specialist</td> </tr> <tr> <td>If Position Title is Undecided, please enter Proposed Position Title:</td> <td><input type="text"/></td> </tr> <tr> <td>Proposed Working Title:</td> <td><input type="text"/></td> </tr> <tr> <td>Proposed Class Code:</td> <td></td> </tr> <tr> <td>Proposed Pay Band:</td> <td>Professional</td> </tr> <tr> <td>Proposed FLSA:</td> <td>Exempt</td> </tr> <tr> <td>* Position Number:</td> <td><input type="text"/></td> </tr> <tr> <td>* Employee:</td> <td>Borders, Faye</td> </tr> <tr> <td>EClass Description:</td> <td>30-University Work Force Ex FT</td> </tr> <tr> <td>* Supervisor's Name:</td> <td>Sargent, April</td> </tr> </table>								Proposed Position Title:	Human Resources Specialist	If Position Title is Undecided, please enter Proposed Position Title:	<input type="text"/>	Proposed Working Title:	<input type="text"/>	Proposed Class Code:		Proposed Pay Band:	Professional	Proposed FLSA:	Exempt	* Position Number:	<input type="text"/>	* Employee:	Borders, Faye	EClass Description:	30-University Work Force Ex FT	* Supervisor's Name:	Sargent, April
Proposed Position Title:	Human Resources Specialist																												
If Position Title is Undecided, please enter Proposed Position Title:	<input type="text"/>																												
Proposed Working Title:	<input type="text"/>																												
Proposed Class Code:																													
Proposed Pay Band:	Professional																												
Proposed FLSA:	Exempt																												
* Position Number:	<input type="text"/>																												
* Employee:	Borders, Faye																												
EClass Description:	30-University Work Force Ex FT																												
* Supervisor's Name:	Sargent, April																												



Special Notes about this page:

- If you selected **Undecided** as your title, please enter a **Proposed Position Title** and **Proposed Working Title**.
- **Employee** - If the position is vacant, please enter **Vacant Employee** here.
- **Supervisor 2** and **Supervisor 3** – these fields may contain the names of mid-level supervisors who exist between the immediate supervisor and the department head, dean, division/head, or VP. These fields are optional.

→Click on **Continue to Next Page**.

8) **Go to page 14** of this manual for detailed instructions on completing the following remaining tabs.

- Essential Functions
- Position Information
- Physical Demands Form
- Supplemental Documentation
- Requisition Form
- Posting Specific Questions
- Disqualifying Points

Instructions on how to complete the following Job Questionnaire actions:

- Request to Change Supervisory Reporting Relationship
- Certify Employee Job Questionnaire/Establish Objectives

Request to Change Supervisory Reporting Relationship

Use this action when there is a supervisory change.

- 1) Login to PPEMS.
- 2) This action can be started by the following user types:
 - a. Administrative User
 - b. Supervisor
 - c. Employee
 - d. Eval Admin User
- 3) Click on **Start Action** to begin the action.

Begin New Action	
8 Records	
Action	Description
Request to Establish a New Job Questionnaire and Recruit Start Action	Action A: Use this action to request to establish a new position and recruit for the position once approved
Request to Establish a New Job Questionnaire Start Action	Action B: Use this action to request to establish a new position only.
Request to Reclassify a Job Questionnaire and Recruit Start Action	Action C: Use this action to request a reclassification of an existing position and recruit for the position.
Request to Reclassify a Job Questionnaire Start Action	Action D: Use this action to request a reclassification of an existing position.
Request to Update/Review a Job Questionnaire and Recruit Start Action	Action E: Use this action to request an update of the duties of an existing position and recruit for the position
Request to Update/Review a Job Questionnaire Start Action	Action F: Use this action to request an update of the duties of an existing position when no change in position classification is requested. Or review duties and responsibilities with employee to certify job questionnaire.
Request to Change Supervisory Reporting Relationship Start Action	Action G: Use this action to request a change when the employees supervisor changes.
Certify Employee Job Questionnaire/Establish Objectives Start Action	Action H: Use this action to establish objectives for employees and certify current job questionnaire.



- 4) Search for the position you wish to take action on. You may enter search criteria in one or more of the search fields OR you may simply click on **Search** to bring up positions you are responsible for or that are assigned to your department.



Search Tip: The more search criteria you enter, the more difficult it will be for the system to locate the position you are searching for, as it will be looking for an exact match of the criteria you have entered. Less is better.

Recommended: Enter the **Last Name** and click on **Search**.

- 5) Click on **Start Action** on the job questionnaire you wish to take action on.
Caution: You can only have 1 open action on a Job Questionnaire at a time. Please make sure you begin and receive approval from HR on the most important action you need to accomplish first. If you receive the error message below, it means you have already begun another action on this job questionnaire that must be completed before you may begin another. Contact Human Resources for more information on your outstanding action.

Choose Job Questionnaire to Begin Action On

1 Record

Classification Title	Working Title	Class Code	Position Number	Employee Last Name	Last Action
Human Resources Specialist		1012			Job Questionnaire Approved View History

Error Message: If you receive this message, you already have another action pending on this job questionnaire that must be completed first.

⚠ This Position has an outstanding Action that must be completed before any new Actions may take place.

Choose Job Questionnaire to Begin Action On

1 Record

Classification Title	Class Code	Position Number	Employee First Name	Employee Last Name	Last Action
Office Specialist	0102				Job Questionnaire Approved View History

- 6) The job questionnaire will open as shown below. The green bar across the top contains **Tabs** or pages of the job questionnaire.

Request to Change Supervisory Reporting Relationship	
Current Title	Position Details
CONTINUE TO NEXT PAGE >>	
This tab displays the present title associated with this Job Questionnaire, if applicable. New positions will not have a current title.	
*Required information is denoted with an asterisk.	
Position Title:	Office Specialist
Position Class Code:	0102
Pay Band:	Office/Program support
EClass Description:	32-University Work Force NE FT
EEO Skill:	50 Clerical & Secretarial

- The first tab is not editable. It displays the title of the position and is viewable only.
- Click on **Continue to Next Page** to move to the **Position Details** page.

- 7) **Position Details** tab: On the position details page, you will be able to edit the supervisor fields and supervisory change effective date only.

- Click on the drop down arrows by the appropriate supervisor field to assign the new supervisor's name to the job questionnaire and enter the effective date of this supervisory change.
- To save your work and return at a later time, click on **Save and Stay on this Page**.

Enter the effective date of the supervisory change.

Assign additional supervisors here, if applicable.

→Click on **Continue to Next Page**.

8) **Summary Page** - On this page you can . . .

- **Save** the action if you are not ready to route the request; or
- **Send to HR Initial Review** – all supervisory change requests will be routed to HR first for an initial review to ensure proper electronic routing of the document.

Current Title	
Position Title:	Program Specialist
Position Class Code:	4206
Pay Band:	Office/Program support
EClass Description:	32-University Work Force NE FT



Special Notes about the supervisory change action:

- **Important:** Supervisory Change actions **require** routing to the **employee** and new **supervisor** to capture their electronic signatures.
- **Department Head Approval** is optional and is left to the discretion of the department.

Routing Options for the Request to Change Supervisory Reporting Relationship:

Administrative User → HR Initial Review → Employee → New Supervisor → (Dept Head) → HR

Current Supervisor → HR Initial Review → Employee → New Supervisor → (Dept Head) → HR

Eval Admin User → HR Initial Review → Employee → New Supervisor → (Dept Head) → HR

Employee → HR Initial Review → New Supervisor → (Dept Head) → HR

- **Required:** Employees (Employee User Type) will be required to certify that they have reviewed the supervisory changes to the position as shown below.

Supervisor 2: (If Applicable)	No Response
Supervisor 3: (If Applicable)	No Response
EEO Skill:	30 Other Professionals
* Update Certification	<input checked="" type="checkbox"/> I certify that I have reviewed the supervisory changes to the position to which I am assigned.

Certify Employee Job Questionnaire/Establish Objectives

- 1) Select this action to set objectives for a new employee or existing employee and to allow the employee to certify receipt of the job questionnaire and objectives.
- 2) Login to PPEMS
- 3) This action should be started by the supervisor. Make sure you change your user type to "Supervisor" to begin this action. (See User Types)
- 4) Click on **Start Action**.

Begin New Action	
8 Records	
Action	Description
Request to Establish a New Job Questionnaire and Recruit Start Action	Action A: Use this action to request to establish a new position and recruit for the position once approved.
Request to Establish a New Job Questionnaire Start Action	Action B: Use this action to request to establish a new position only.
Request to Reclassify a Job Questionnaire and Recruit Start Action	Action C: Use this action to request a reclassification of an existing position and recruit for the position.
Request to Reclassify a Job Questionnaire Start Action	Action D: Use this action to request a reclassification of an existing position.
Request to Update/Review a Job Questionnaire and Recruit Start Action	Action E: Use this action to request an update of the duties of an existing position and recruit for the position.
Request to Update/Review a Job Questionnaire Start Action	Action F: Use this action to request an update of the duties of an existing position when no change in position classification is requested, Or review duties and responsibilities with employee to certify job questionnaire.
Request to Change Supervisory Reporting Relationship Start Action	Action G: Use this action to request a change when the employees supervisor changes.
Certify Employee Job Questionnaire/Establish Objectives Start Action	Action H: Use this action to establish objectives for employees and certify current job questionnaire.

- 5) Search for the position you wish to take action on. You may enter search criteria in one or more of the search fields OR you may simply click on **Search** to bring up positions you are responsible for or that are assigned to your department.



Search Tip: The more search criteria you enter, the more difficult it will be for the system to locate the position you are searching for, as it will be looking for an exact match of the criteria you have entered. Less is better.

Recommended: Enter the **Last Name** and click on **Search**.

VIEW OPEN

VIEW PENDING

VIEW HISTORICAL

CREATE REQUISITION

FROM TEMPLATE

FROM PREVIOUS

JOB QUESTIONNAIRES

BEGIN NEW ACTION

SEARCH ACTIONS

PENDING ACTIONS

SEARCH JOB QUESTIONNAIRES

EVALUATIONS

BEGIN NEW PERFORMANCE EVALUATION

PENDING EVALUATIONS

HISTORICAL EVALUATIONS

ADMIN

HOME

CHANGE USER TYPE

LOGOUT

LOGOUT OF HIRING USER

Request to Reclassify a Job Questionnaire and Recruit

Important Note:

Employees: If you are searching for your own performance evaluations or job questionnaire simply click on the search button. It is not necessary to enter any information in the search fields that are located on this page.

Supervisors: If you are searching for an employee performance evaluation or job questionnaire you can either enter information into a specific search field or click the search button at the bottom and it will bring up all employees assigned to the department and you can select the employee from that point.

Search Job Questionnaires to Begin Action On

Employee Last Name	<input type="text"/>	Position Number	<input type="text"/>
Employee First Name	<input type="text"/>	Working Title	<input type="text"/>
UWF ID number	<input type="text"/>	Position Title:	Any <input type="text"/>

6) Click on **Start Action** on the job questionnaire you wish to take action on.

Caution: You can only have 1 open action on a Job Questionnaire at a time. Please make sure you begin and receive approval from HR on the most important action you need to accomplish first.

If you receive the error message below, it means you have already begun another action on this job questionnaire that must be completed before you may begin another. Contact Human Resources for more information on your outstanding action.

Choose Job Questionnaire to Begin Action On					
1 Record					
Classification Title	Working Title	Class Code	Position Number	Employee Last Name	Last Action
Human Resources Specialist		1012	[REDACTED]	[REDACTED]	Job Questionnaire Approved View History
Start Action View Summary					

Error Message: If you receive this message, you already have another action pending on this job questionnaire that must be completed first.

⚠ This Position has an outstanding Action that must be completed before any new Actions may take place.

Choose Job Questionnaire to Begin Action On					
1 Record					
Classification Title	Class Code	Position Number	Employee First Name	Employee Last Name	Last Action
Office Specialist	0102	[REDACTED]	[REDACTED]	[REDACTED]	Job Questionnaire Approved View History
Start Action View Summary					

7) The job questionnaire will open as shown below. The green bar across the top contains **Tabs** or pages of the job questionnaire.

Certify Employee Job Questionnaire/Establish Objectives

Current Title	Current Job Questionnaire	Position Details	Essential Functions	Position Information	Required Objectives	Additional Objectives	Supplemental Documentation
CONTINUE TO NEXT PAGE >>							
This tab displays the present title associated with this Job Questionnaire, if applicable. New positions will not have a current title.							
*Required information is denoted with an asterisk.							
Position Title:	Program Specialist						
Position Class Code:	4206						
Pay Band:	Office/Program support						
EClass Description:	32-University Work Force NE FT						
EEO Skill:	50 Clerical & Secretarial						
FLSA:	Non Exempt						
A high school diploma and four years of appropriate							

- The first five tabs are not editable. You can only edit the **Required Objectives** and the **Additional Objectives** tabs.
- Click on **Continue to Next Page** until you come to the **Required Objectives** page.

8) **Required Objectives** tab: You can enter up to four (4) objectives on this page.

The screenshot shows the 'Employment and Position Management' interface. At the top, there is a blue header with the Florida state logo and the text 'Employment and Position Management'. Below the header, the page title is 'OBJECTIVE EXAMPLES'. A red asterisk indicates that required information is denoted with an asterisk. The main content is a table with four rows, each representing an objective. A red arrow points to the first row, 'Objective 1'. The table contains the following text:

* Objective 1:	Cross-train on all front desk duties.
Objective 2:	Cross-train on monthly p-card reconciliation and monthly budget reconciliation.
Objective 3:	Attend all pertinent in-house training. Complete the on-line Office 2007 (Word, Excel, Outlook, Office and Powerpoint) training.
Objective 4:	Assist office administrator with purging/dispositioning all old files remaining from prior employees per General Records Schedule.

Below the table, there are three buttons: '<< RETURN TO PREVIOUS', 'CONTINUE TO NEXT PAGE >>', and 'SAVE AND STAY ON THIS PAGE'. The 'CONTINUE TO NEXT PAGE >>' button is highlighted with a green border.

→Click on **Continue to Next Page**.

9) **Additional Objectives** tab: You may enter additional objectives here. If you do not have additional objectives, click on **Continue to Next Page**.

- To enter additional objectives, click on **Add New Entry**.

- You can enter one additional objective at a time.
- Enter the objective in the text field and click on **Add Entry** (or **Cancel** to return to the previous screen without adding an objective).

- You can **View**, **Edit**, or **Delete** the objective or add another objective by clicking on **Add New Entry**.

Current Title	Current Job Questionnaire	Position Details	Essential Functions	Position Information	Required Objectives	Additional Objectives	Supplemental Documentation
<p>✓ The entry has been added.</p> <p>To add a new Entry, click the Add New Entry button below. To view more details about an existing entry, click the View link for the entry. To edit an existing entry, click the Edit link for that entry. To delete an existing entry, click the Delete link for that entry.</p> <p>ADD NEW ENTRY</p> <p>Existing Entries</p> <p>1 Record</p> <p>▲ Objective:</p> <p>This is a test.</p> <p>View Edit ←</p> <p>Delete</p> <p>ADD NEW ENTRY</p> <p><< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >></p> <p>SAVE AND STAY ON THIS PAGE</p>							



Remember to save your work occasionally by clicking on the **Save and Stay on this Page** button.

→Click on **Continue to Next Page**

10) Supplemental Documentation tab:

- Click on **Attach** to attach any supplemental documentation. For detailed instructions on how to attach documents, see **Important User Tips**.

Certify Employee Job Questionnaire/Establish Objectives

Current Title	Current Job Questionnaire	Position Details	Essential Functions	Position Information	Required Objectives	Additional Objectives	Supplemental Documentation												
<p>2 Records</p> <table border="1"> <thead> <tr> <th>Attach / Remove</th> <th>Document Type</th> <th>Attached Document</th> <th>View Document</th> </tr> </thead> <tbody> <tr> <td>Attach</td> <td>Memo</td> <td>Not Attached</td> <td></td> </tr> <tr> <td>Attach</td> <td>Organizational Chart</td> <td>Not Attached</td> <td></td> </tr> </tbody> </table> <p><< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >></p> <p>SAVE AND STAY ON THIS PAGE</p>								Attach / Remove	Document Type	Attached Document	View Document	Attach	Memo	Not Attached		Attach	Organizational Chart	Not Attached	
Attach / Remove	Document Type	Attached Document	View Document																
Attach	Memo	Not Attached																	
Attach	Organizational Chart	Not Attached																	

- 11) After attaching your documents (if applicable), click on **Continue to Next Page** until you come to the Certify Employee Job Questionnaire/Establish Objectives Summary.
 - On this page you can . . .
 - **Save Action Without Submitting**; or
 - **Send to Employee**
 - Select **Send to Employee** and click on **Continue**.

Certify Employee Job Questionnaire/Establish Objectives Summary

To change the status of this action, choose from the statuses below:

[Printer-Friendly Version](#)

Action Status

Save Action Without Submitting
 Send to Employee

Current Title

Position Title:	Human Resources Specialist
Position Class Code:	1012
Pay Band:	Professional



You must click on **Confirm** to complete the action.

University of West Florida
Employment and Position Management

• Welcome **Kimberly Keebler**. You are logged in as Karen Larson. Tuesday, April 8, 2008
 Your Current Group: Supervisor.

Confirm Change Action Status ←

You are about to change this action to the following status:

Action Status

Send to Employee

- You will be returned to the **Search Actions** screen with a message informing you that you have successfully completed the action you requested.

9) The employee will route the request back to the supervisor (by doing this, the employee is certifying receipt of the job questionnaire and objectives). The supervisor will route the request to Human Resources.

- Routing for the Certify Employee Job Questionnaire/Establish Objectives action:

Supervisor→Employee→Supervisor→Human Resources



Special Notes about this action:

- Users may locate any Action that has been sent to them or saved by them in the system by clicking on “Pending Actions” under the Job Questionnaire menu.
- Required:** Employees will be required to certify that they have reviewed the job questionnaire and the supervisor assigned to their position.

Job Questionnaire Library

Click on **Search Job Questionnaires** to view the most recent, HR Approved version of a Job Questionnaire. You may filter your selection by specific search criteria, or you may leave the search criteria blank to retrieve all of the approved position descriptions you have access to in the system.

Search Job Questionnaires – Your electronic file cabinet of HR Approved Job Questionnaires for your area(s) of responsibility.



University of West Florida

Employment and Position Management

JOB POSTINGS
VIEW OPEN
VIEW PENDING
VIEW HISTORICAL
CREATE REQUISITION
FROM TEMPLATE
FROM PREVIOUS
JOB QUESTIONNAIRES
BEGIN NEW ACTION
SEARCH ACTIONS
PENDING ACTIONS
SEARCH JOB QUESTIONNAIRES
EVALUATIONS
BEGIN NEW PERFORMANCE EVALUATION
PENDING EVALUATIONS
HISTORICAL EVALUATIONS
SEARCH EVALUATIONS
ADMIN
HOME
CHANGE DEFAULT VIEW
CHANGE USER TYPE
LOGOUT

Welcome **Kimberly Keebler**. You are logged in with Department/Division View.
Your Current Group: Eval Admin User. Monday, April 21, 2008

Welcome to Position, Performance and Employment Management System

[Faculty Hiring Guide](#) [Employee User Guide](#) [Hiring User Tutorial \(Under Revision\)](#)
[View / Download](#) [View / Download](#) [View / Download](#)

Quick Tips for UWF Users:

- **You may have multiple user types:** Go to Admin > Change User Type and select the appropriate user type > then click change group, the screen will automatically refresh.
- **Employees:** Make sure that you are logged in as Employee User Type to complete your performance evaluation.
- **Supervisors:** To view and complete employee performance evaluations > Make sure you are logged in as Supervisor User Type.
- **All Users:** Anytime you start an action in the system and save it, in order to retrieve it you must go to pending either Job Questionnaires or Performance Evaluations.

Performance Evaluations

.....

How to Complete the Performance Evaluation Action

User Types: There are three user types applicable to the **Performance Evaluation** action: **Employee, Supervisor, and Reviewing Officer**. These are the electronic signatures required on performance evaluations; therefore, you must be logged in as one of these user types to complete the performance evaluation process.



Special Note:

- **Eval Admin User** - is an additional user type that may be used for the performance evaluation process. This user type may perform **typing functions** only on behalf of the Supervisor.
- Because this user type will have access to the performance evaluations of others, this user type is assigned on a case-by-case basis and must be requested via email to Kay Larson at klarson@uwf.edu.

Recommended Workflow for the Performance Evaluation:

- Employee starts the evaluation process by completing the self-evaluation and sends to Supervisor.
- Supervisor completes standard competencies, evaluation details and objectives and sends to Reviewing Officer.
- Reviewing Officer reviews, makes additional comments, if applicable, and sends back to Supervisor
- Supervisor sends to Employee for Certification
- Employee certifies (or refuses to sign) and sends to Supervisor
- Supervisor sends to Human Resources

Employee (completes self-evaluation)→Supervisor (completes evaluation/)→Reviewing Officer→Supervisor→Employee (to certify receipt of evaluation)→Supervisor→Human Resources

Starting the Performance Evaluation

For this example, the employee has already submitted the self-evaluation to the Supervisor. The employee process has been outlined in the **Employee User Guide**.

- 1) The Supervisor will receive an email notification that the employee has sent the performance evaluation to him/her.
- 2) The Supervisor will login to PPEMS, change user type to Supervisor, and click on **Pending Evaluations**.

University of West Florida Employment and Position Management

• Welcome **Kimberly Keebler**. You are logged in as Karen Larson.
Your Current Group: Supervisor. Monday, April 14, 2008

Welcome to Position, Performance and Employment Management System

[Faculty Hiring Guide](#) / [View / Download](#)
 [Employee User Guide](#) / [View / Download](#)
 [Hiring User Tutorial \(Under Revision\)](#) / [View / Download](#)

Quick Tips for UWF Users:

- **You may have multiple user types:** Go to Admin > Change User Type and select the appropriate user type > then click change group, the screen will automatically refresh.
- **Employees:** Make sure that you are logged in as Employee User Type to complete your

- 3) Pending evaluations will be listed. On this screen you can see the **Status** of the pending evaluation(s) and the **Date** that the last action was taken on the evaluation(s).

View Pending Evaluations

Active Evaluations						
Title	Position Number	Employee First Name	Employee Last Name	Evaluation Working Title	Last Action Date	Status
Human Resources Specialist View View Summary	[REDACTED]	[REDACTED]	[REDACTED]		04-14-2008	Evaluation Sent to Supervisor

- Click on **View** to begin editing the evaluation.

- Click on the **Edit** link.

View Performance Evaluation Summary

Please review the details of the evaluation carefully before continuing.

To take the action you have specified, click the **Continue** button. To edit the evaluation, click the **Edit** link. To exit the evaluation without making any changes, click the **Cancel** button.

→ [Edit](#) [Printer-Friendly Version](#)

Evaluation Status

Save
 Send Evaluation to Employee for Review
 Send Evaluation to Reviewing Officer
 Send Evaluation to Evaluation Administrative User
 Return Evaluation to Employee for Editing

- 4) The performance evaluation will open as show below. The green bar across the top contains **Tab**s or pages of the performance evaluation.

View/Edit Performance Evaluation

→

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents	Notes/History														
<input type="button" value="CONTINUE TO NEXT PAGE >>"/>																						
<p><small>*Required information is denoted with an asterisk.</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Employee First Name</td> <td>Kimberly</td> </tr> <tr> <td>Employee Last Name</td> <td>Keebler</td> </tr> <tr> <td>Employee:</td> <td>Keebler, Kimberly</td> </tr> <tr> <td>Position Number:</td> <td>110350</td> </tr> <tr> <td>Department:</td> <td>Office Of Human Resources-1450</td> </tr> <tr> <td>Supervisor's Name: <small>(If this is not the current supervisor please contact HR)</small></td> <td>Larson, Karen</td> </tr> <tr> <td>Position Title:</td> <td>Human Resources Specialist</td> </tr> </table>									Employee First Name	Kimberly	Employee Last Name	Keebler	Employee:	Keebler, Kimberly	Position Number:	110350	Department:	Office Of Human Resources-1450	Supervisor's Name: <small>(If this is not the current supervisor please contact HR)</small>	Larson, Karen	Position Title:	Human Resources Specialist
Employee First Name	Kimberly																					
Employee Last Name	Keebler																					
Employee:	Keebler, Kimberly																					
Position Number:	110350																					
Department:	Office Of Human Resources-1450																					
Supervisor's Name: <small>(If this is not the current supervisor please contact HR)</small>	Larson, Karen																					
Position Title:	Human Resources Specialist																					

- The first three tabs **are not** editable. They display the **Employee Details**, **Employee Self-Evaluation**, and the *optional* **Employee Supervisor Communication** form and are viewable only.
- Click on **Continue to Next Page** to move through these screens.
- Carefully review the employee’s self evaluation and supervisor communication page.

→Click on **Continue to Next Page**.

5) **Standard Evaluation Competencies** tab:

- There are eleven (11) Standard Competencies/Performance Standards. Carefully review and score each one based on the employee’s objectives and performance for the review period.
- Click on the **Explanation of Standard Competencies** link for a detailed explanation of each standard.

- After you score each competency, total the score and enter it into the **Employee’s Overall Score** field and assign the corresponding **Rating**.

Use the scale to determine the appropriate Overall Rating.

→Click on **Continue to Next Page**.

6) **Evaluation Details** tab: Carefully review each field and enter the appropriate information.



Special Notes about this page:

- **Type of Review** - There are three types of performance evaluations
 - **Annual** – the period of review for this type of evaluation will be published by Human Resources.
 - **Position Orientation** – the period of review for this type of evaluation will be determined by the employee’s *Date of Hire*.
 - **Special** – the period of review for this type of evaluation will be determined by the Supervisor and Human Resources.

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents	Notes/History
				<input style="border: 1px solid black;" type="button" value=" << RETURN TO PREVIOUS "/> <input style="border: 1px solid black;" type="button" value=" CONTINUE TO NEXT PAGE >> "/>				
*Required information is denoted with an asterisk.								
* Period of Review Begin Date:		<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY					
* Period of Review End Date:		<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY					
* Type of Review:		<div style="border: 1px solid gray; padding: 2px;"> No Response ▾ No Response Annual Position Orientation Special </div>						
* What were the employee's strong points and accomplishments during this rating period?		<input type="text"/>						
* What are the areas in which the employee could make improvement?		<input type="text"/>						
		Not Selected	Selected					
		Archer, Linda	Burton, Reta	>	No Response			

Enter the appropriate beginning and ending dates for the review period. Dates must be entered in the appropriate format.

Select the appropriate type of review to be completed.

- **Reviewing Officer** – assign the Reviewing Officer for this evaluation from the drop-down list.
- **Comments** fields – all comments fields are optional.

The screenshot shows a web form for performance evaluations. It includes a dropdown menu for 'Reviewing Officer: (Next level supervisor)' with 'No Response' selected. Below are text input fields for 'Supervisor Comments:', 'Employee Comments:', and 'Reviewing Officer Comments:'. A red asterisk is next to the 'Reviewing Officer' label. At the bottom, there are three buttons: '<< RETURN TO PREVIOUS', 'SAVE AND STAY ON THIS PAGE', and 'CONTINUE TO NEXT PAGE >>'. A red arrow points to the 'Reviewing Officer' field, and another red arrow points to the 'SAVE AND STAY ON THIS PAGE' button. A note below the form states: '*Required information is denoted with an asterisk.'



Remember to save your work occasionally by clicking on the **Save and Stay on this Page** button. **Required fields** are marked with a red asterisk (*) and must be completed before continuing to the next page.

→Click on **Continue to Next Page**

7) Objectives tab:

- Enter the objectives for the **next** review period here. You will enter the **Objectives Begin Date** and the **Objectives End Date**.
- Supervisors are required to enter at least one (1) objective; however, you may enter up to four (4) on this screen.

Create Performance Evaluation - Office Specialist

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents
<div style="display: flex; justify-content: space-between;"> << RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >> </div>							
<p><small>*Required information is denoted with an asterisk.</small></p>							
* Objectives Begin Date:		<input type="text" value="01/01/2008"/>	MM/DD/YYYY -or- MM-DD-YYYY				
* Objectives End Date:		<input type="text" value="09/30/2008"/>	MM/DD/YYYY -or- MM-DD-YYYY				
* Objective 1:		<input type="text" value="This is a test."/>					
Objective 2:		<input type="text" value="This is a test."/>					
		<input type="text" value="This is a test."/>					

8) **Additional Objectives** tab: You may enter additional objectives here. If you do not have additional objectives, click on **Continue to Next Page**.

- To enter additional objectives, click on **Add New Entry**.

Create Performance Evaluation - Office Specialist

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents
<p>If you wish to add, change, or delete previously established objectives to this current evaluation you will need to save this document, and go to 'Job Questionnaire' > 'Begin new action' > 'Establish/Update Employee objectives'.</p> <p>When you are finished adding your entries, you may go to the next page by clicking "Save and Continue to Next".</p> <p>To Edit An Entry: Click the Edit link for the specific entry. To View An Entry: Click the View link for the specific entry.</p>							
Existing Entries							
No Records Found							
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin: 5px;">ADD NEW ENTRY</div> <div style="border: 1px solid black; padding: 5px; margin: 5px;"><< RETURN TO PREVIOUS</div> <div style="border: 1px solid black; padding: 5px; margin: 5px;">CONTINUE TO NEXT PAGE >></div> </div> <div style="display: flex; justify-content: center; margin-top: 5px;"> <div style="border: 1px solid black; padding: 5px; margin: 0 10px;">SAVE AND STAY ON THIS PAGE</div> </div>							

You can enter one additional objective at a time.

- Enter the objective in the text field and click on **Add Entry** (or **Cancel** to return to the previous screen without adding an objective).

- You can **View, Edit, or Delete** the objective or add another objective by clicking on **Add New Entry**.



Remember to save your work occasionally by clicking on the **Save and Stay on this Page** button.

→Click on **Continue to Next Page**.

9) **Supplemental Documents** tab:

- Click on **Attach** to attach any supplemental documentation. For detailed instructions on how to attach documents, see **Important User Tips**.

View/Edit Performance Evaluation

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents	Notes/History
2 Records								
Attach / Remove		Document Type			Attached Document			
Attach		Evaluation Year Objectives			Not Attached			
Attach		Other			Not Attached			
<input style="border: 1px solid black;" type="button" value=" << RETURN TO PREVIOUS "/>				<input style="border: 1px solid black;" type="button" value=" CONTINUE TO NEXT PAGE >> "/>				
<input style="border: 1px solid black;" type="button" value=" SAVE AND STAY ON THIS PAGE "/>								

→Click on **Continue to Next Page**.

10) **Notes/History** tab: The history of the action (document) is recorded on this tab.

- You can view the document as it looked each time it is saved or routed electronically by clicking on the **View Summary** link.
- You can also see the date and time of the action and the user who modified the action.



Special Note: For security purposes, only the Supervisor and Reviewing Officer user types have view access to the Notes/History tab.

View/Edit Performance Evaluation

Employee Details	Employee Self Evaluation Form	Employee Supervisor Communication	Standard Evaluation Competencies	Evaluation Details	Objectives	Additional Objectives	Supplemental Documents	Notes/History
History								
							Modified By	
04-14-2008 5:05 PM							Kimberly Keebler	
Evaluation Sent to Supervisor								
View Summary								
<input style="border: 1px solid black;" type="button" value=" << RETURN TO PREVIOUS "/>				<input style="border: 1px solid black;" type="button" value=" CONTINUE TO NEXT PAGE >> "/>				
<input style="border: 1px solid black;" type="button" value=" SAVE AND STAY ON THIS PAGE "/>								

Date and time evaluation was Sent to Supervisor

User who took the action.

→Click on **Continue to Next Page**.

11) View Performance Evaluation Summary

- On this page, you can . . .
 - Save your work if you are not ready to route the request to the next appropriate person; or
 - Select the next appropriate approval level and click on **Continue**.
- In this example, the supervisor has just completed the Standard Evaluation Competencies and Evaluation Details.
- The **Supervisor** should route to the **Reviewing Officer** and click on **Continue**.

Remember: The recommended routing for performance evaluations is as follows:

Employee (self eval) → Supervisor → Reviewing Officer → Supervisor → Employee (certifies) → Supervisor → Human Resources.

View Performance Evaluation Summary

Please review the details of the evaluation carefully before continuing.

To take the action you have specified, click the **Continue** button. To edit the evaluation, click the **Edit** link. To exit the evaluation without making any changes, click the **Cancel** button.

[Edit](#)

 [Printer-Friendly Version](#)

Evaluation Status

Save
 Send Evaluation to Employee for Review
 Send Evaluation to Reviewing Officer
 Send Evaluation to Evaluation Administrative User
 Return Evaluation to Employee for Editing

Click on **Printer-Friendly Version** to print a copy of the evaluation.

Employee Details

Employee First Name	Kimberly
Employee Last Name	Keebler

Employee Self Evaluation Form

In the past year, what did I do to excel in the performance of my duties?	this is a test.
What areas could I improve during the next year?	this is a test.
Outline specific efforts of self-improvement and development activities you pursued and accomplished during this evaluation period.	test
What goals would I like to achieve in the next year?	test
How can my supervisor help me accomplish these goals?	test

On this page, you can also scroll through the entire performance evaluation to view the evaluation in its entirety.

- Select **Send Evaluation to Reviewing Officer** and click on **Continue**.
- Click on **Confirm** to confirm your action.



You must click on **Confirm** to complete the action.

The screenshot shows the University of West Florida Employment and Position Management interface. A navigation menu on the left includes options like 'JOB POSTINGS', 'CREATE REQUISITION', 'JOB QUESTIONNAIRES', 'EVALUATIONS', and 'ADMIN'. The main content area displays a confirmation dialog titled 'Confirm Change Evaluation Status'. It informs the user that they are about to change the action to 'Send Evaluation to Reviewing Officer'. At the bottom of the dialog, there are two buttons: 'GO BACK' and 'CONFIRM'. A red arrow points to the 'CONFIRM' button.

- You will be returned to the **View Pending Evaluations** screen with a message informing you that you have successfully completed the action you requested.
- You can verify the status of the performance evaluation and the date of the last action on this screen.

View Pending Evaluations

→ ✓ The status of Evaluation has successfully been changed to **Evaluation Sent to Reviewing Officer**.

Active Evaluations						
Title	Position Number	Employee First Name	Employee Last Name	Evaluation Working Title	Last Action Date	Status
Human Resources Specialist	110350	Kimberly	Keebler		04-14-2008	Evaluation Sent to Reviewing Officer



Special Notes:

- Once the performance evaluation has been moved to another user type, you will only be able to view the evaluation. You can edit the evaluation only when it is at your user type.
- After the evaluation has been accepted by Human Resources, you will receive an email notification that it has been moved to the status of **Completed**.

Viewing Historical Evaluations

Once evaluations are accepted by Human Resources, they become historical. These can be viewed by clicking on Historical Evaluations under the Evaluations menu.

Historical Evaluations – Your electronic file cabinet of completed performance evaluations for your area(s) of responsibility.



University of West Florida Employment and Position Management

• Welcome **Kimberly Keebler**. You are logged in with Department/Division View. Monday, April 21, 2008
Your Current Group: Eval Admin User.

Welcome to Position, Performance and Employment Management System

[Faculty Hiring Guide](#) [Employee User Guide](#) [Hiring User Tutorial \(Under Revision\)](#)
[View / Download](#) [View / Download](#) [View / Download](#)

Quick Tips for UWF Users:

- **You may have multiple user types:** Go to Admin > Change User Type and select the appropriate user type > then click change group, the screen will automatically refresh.
- **Employees:** Make sure that you are logged in as Employee User Type to complete your performance evaluation.
- **Supervisors:** To view and complete employee performance evaluations > Make sure you are logged in as Supervisor User Type.
- **All Users:** Anytime you start an action in the system and save it, in order to retrieve it you must go to pending either Job Questionnaires or Performance Evaluations.