Planning Stage Instructions:

As the Supervisor (Rater):

1. Login to Bearcat Web.
2. Go to the Employee menu.
3. Click on EPMS Online.
4. Click on Create Planning Document (*Note: this link is under the Supervisor (Rater) section of the page*)

5. Select the employee name from the drop-down box.

6. The employee's job duties will auto-populate based on their currently approved position description. Enter the success criteria for each job duty. Click Save.

	Add success criteria to your employees job functions.		
Row	**Job Function**	**Weight**	**Success Criteria**
1	Administers pre-payroll, salary changes, and other changes as needed. Sends transactions to SCEIS to ensure information remains current.	30	
2	Assists Class and Comp Manager with position control, position descriptions, new hires, reclassifications, pay increases, and other related actions. Serves as back-up to Class and Comp Manager when necessary.	20	
3	Manages the employee leave program. Coordinates employee leave entry on the web, ensuring that all leave reports are submitted and approved monthly. Trains supervisors and new employees on the leave entry and approval processes. Provides annual leave reports for the auditors. Tracks leave of absence. Manages the leave transfer pool and prepares annual report to the State. Ensures compliance with Federal, State, and University policies and procedures.	15	

7. Go to the Objectives section, click Add New to enter an objective and success criteria. Click Save. (*Note: you can enter up to five objectives, do so by repeating step 7 for each one*)

	Create job objectives for your employee. Total weight of job objectives can be no greater than 25. Max of 5 Objectives.			
Delete	**Row**	**Job Objective**	**Weight**	**Success Criteria**
Add New				

	Select performance characteristics that apply to your employee. You must pick 5 characteristics.	
Row	**Characteristic**	**Description**
1		
2		
3		
4		
5		

☐ Checking this box and clicking the "Save Document" button sends the planning document to the reviewer.

Save Document

If you make changes to the document save before trying to print.

8. Go to the Performance Characteristics section and select up to five performance characteristics. Click Save. (*Note: see above screenshot for performance characteristics*)

9. Once all sections are completed, scroll to the bottom and click the check box and submit. (*Note: this will route the planning document to the Reviewer*)