

## How to create a Self-Assessment in the ePM system

1. Log in to ePM [http://apps.texastech.edu/hr\\_epm/](http://apps.texastech.edu/hr_epm/)
2. Your 'My PM Docs' tab will contain three sections; My Position Descriptions, My Evaluations, and Self-Assessment Sections

Each section can be expanded or collapsed by clicking on the black header bar.

Sections expanded:

The screenshot displays the 'My PM Docs' interface with three sections expanded. The first section, 'My Position Descriptions', contains a table with the following data:

Position Number	Title	Supervisor	Effective Date	Status	Details
H95307	Director	Super Visor	03/16/2016	Final	<a href="#">Details</a>
H95307	Section Manager-HRIS/Records	Super Visor	01/30/2015	History	<a href="#">Details</a>
H95307	Section Manager-HRIS	Super Visor	07/06/2012	History	<a href="#">Details</a>

The second section, 'My Evaluations', contains a table with the following data:

Position Number	Title	Supervisor	Evaluation Date	Status	Details
H95307	Section Manager-HRIS/Records	Super Visor	01/29/2016	Final	<a href="#">Details</a>
H95307	Section Manager-HRIS/Records	Super Visor	02/17/2015	History	<a href="#">Details</a>
H95307	Section Manager-HRIS	Super Visor	02/12/2014	History	<a href="#">Details</a>
H95307	Section Manager-HRIS	Super Visor	02/19/2013	History	<a href="#">Details</a>

The third section, 'Self-Assessment Section', includes a filter menu with the following options:

- In Progress
- Completed
- Waiting for Signature
- History

Below the filter menu is a table with the following data:

Last Name	First Name	Tech ID	Position	Department	Self-Assessment Date	Status	Details
Rider	Masked	R00511483	H95307	Human Resources Lbk	05/08/2016	Complete	<a href="#">Details</a>

Sections collapsed:

The screenshot displays the 'My PM Docs' interface with three sections collapsed. The first section, 'My Position Descriptions', is collapsed. The second section, 'My Evaluations', is collapsed. The third section, 'Self-Assessment Section', is collapsed and includes a '- Delete + Create' button.

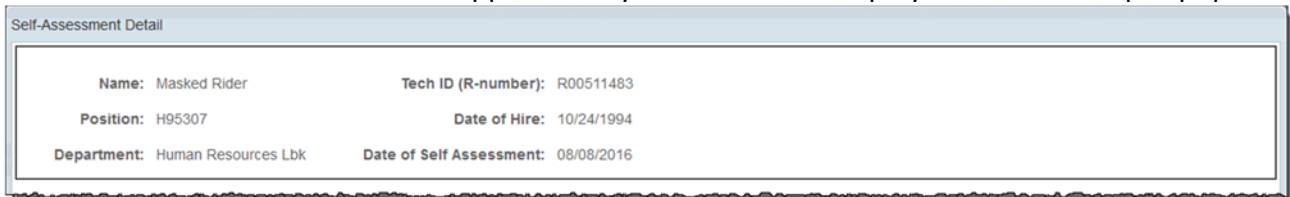
3. General information:

- Refer to your most recent Evaluation and Position Description as you complete your Self-Assessment
  - Click Details next to the document you wish to review.
  - Click Save to PDF to see or print a PDF copy of the document
- Refer to the Self-Assessment Brochure on the Performance Management Information page (<http://www.ttuhsu.edu/hr/performance.aspx>)

4. To start the Self-Assessment, click +Create in the Self-Assessment Section header bar.

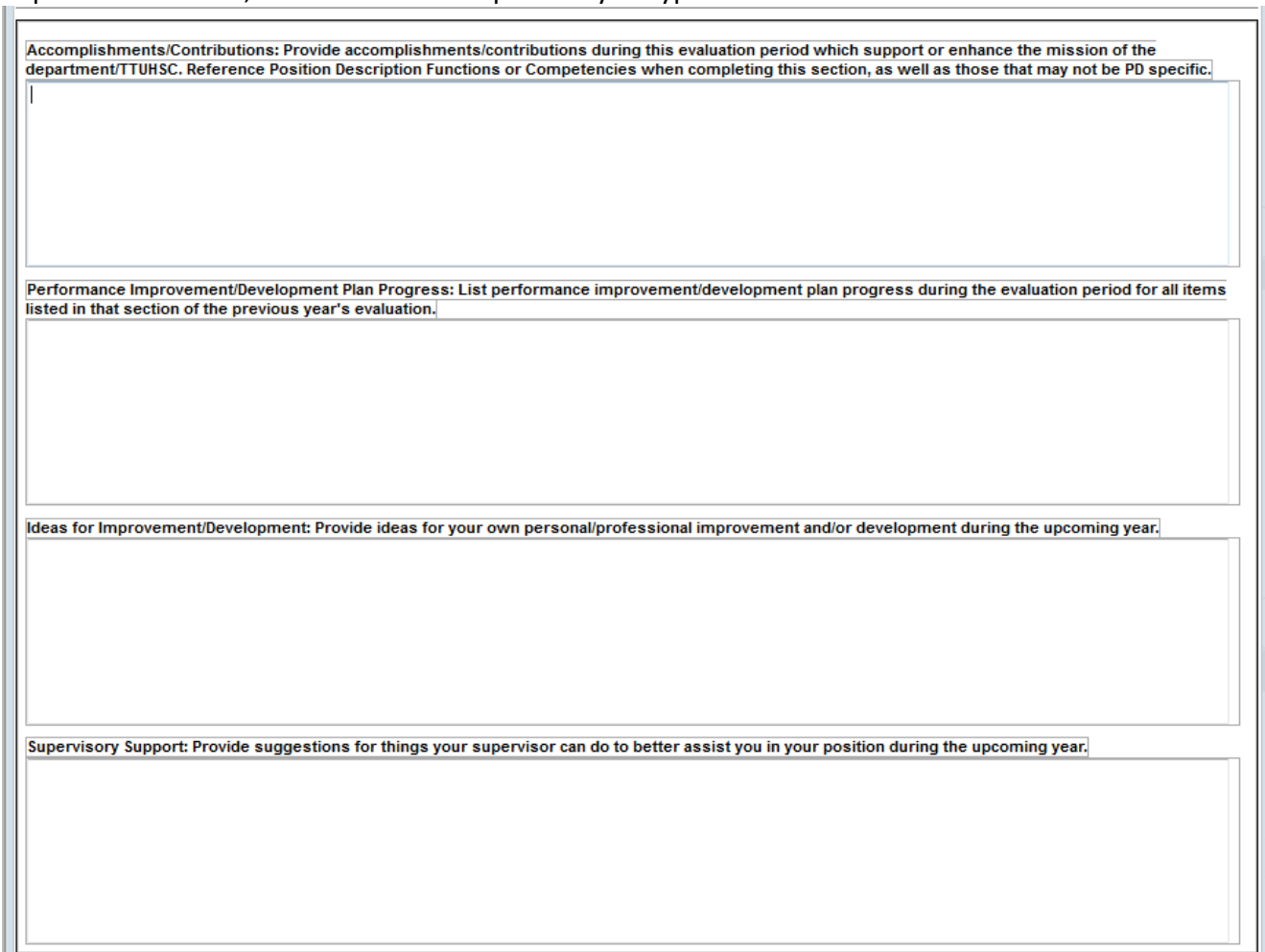


The Self-Assessment Detail form will appear with your Name and employee information pre-populated

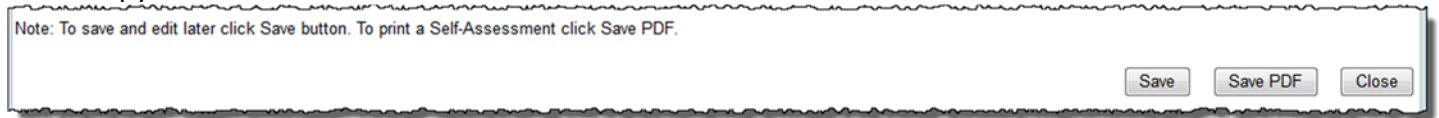


5. Complete the four sections. Begin typing in each box.

Space is unlimited, and the box will expand as you type.



6. To save and continue later, click Save at the bottom of the form. The document will appear in your Self-Assessment section with a status of In-Progress. You can also click Save PDF at any time to view, save or print a PDF copy of the document.



7. When you have completed all four sections, click the checkbox next to Signature of Employee. A Signature Confirmation box will appear. Click Sign.



An Information box will appear indicating that an email has been sent to Supervisor. Click OK and your signature will appear in the Acknowledgments section. Close the form.

The Self-Assessment status will change to Waiting for Signature.

Last Name	First Name	Tech ID	Position	Department	Self-Assessment Date	Status	Details
Rider	Masked	R00511483	H95307	Human Resources Lbk	08/08/2016	Waiting for Signature	Details

The Supervisor will receive an email notification.

-----Original Message-----  
 From: ePM@ttu.edu [mailto:ePM@ttu.edu]  
 Sent: Tuesday, July 26, 2016 11:49 AM  
 To: Supervisor, Super <super.supervisor@ttuhsc.edu>  
 Subject: Self-Assessment by Masked Rider

Masked Rider has signed and submitted a Self-Assessment for your review and signature.  
 Please log in to the ePM system by selecting the link below.  
 The Self-Assessment will be found in the Employee Self-Assessments section of the Evaluations tab.  
 Click the Details button to open and review the Self-Assessment.  
 Click the Supervisor signature box at the bottom of the Self-Assessment; then click the Sign button in the Signature Confirmation box.

[https://apps.texastech.edu/hr\\_epm](https://apps.texastech.edu/hr_epm)

After the supervisor signs, the Self-Assessment status will change to Complete.

Last Name	First Name	Tech ID	Position	Department	Self-Assessment Date	Status	Details
Rider	Masked	R00511483	H95307	Human Resources Lbk	08/08/2016	Complete	Details

Your Self-Assessment will be sent immediately to your employee file.

**Unlock:**

After you have signed as employee, but before your supervisor has signed it, you can unlock your self-assessment.

*Human Resources does not have the ability to unlock documents.*

1. Find the self-assessment in your list, click Details, and click the Unlock button at the top.



2. Be sure to let your supervisor know you have unlocked the self-assessment, as automated notification will not be sent.
3. Edit and process the document as needed.
4. If the supervisor has already signed the self-assessment, it cannot be unlocked by anyone.  
You will need to complete another self-assessment.  
Contact HR to remove the document from your employee record.  
You can delete the document from ePM by highlighting the document in your list and clicking Delete (use extreme caution when deleting documents).