



# How to Guide

## ePMDS

### Manager Guide



**PeoplePoint**

HR & Pensions Shared Service

# ePMDS Manager How to Guide

## *Table of Contents*

An Overview of ePMDS for Managers.....	3
Information on ePMDS .....	4
Accessing ePMDS & Staff Pages.....	9
1. The ePMDS Goal Setting Stage.....	14
• How to review an ePMDS Goal Setting Form.....	15
2. The ePMDS Mid-Year Review Stage.....	21
• How to review an ePMDS Mid-Year Review Form.....	22
3. The ePMDS End of Year Review Stage.....	28
• How to review an ePMDS End of Year Review Form.....	29
4. The Internal Review.....	35
• What the ePMDS Internal Review Stage means for Managers....	36

# ePMDS Manager How to Guide

## *An Overview of the ePMDS for Managers*

The electronic Performance Management and Development System (ePMDS) is a new online system, which will significantly streamline the PMDS process for Employees and Managers.

Following a PMDS meeting, Employees will complete and submit Forms to Managers on ePMDS. Managers will then receive an email notification, and review and 'Sign Off' their Employees' ePMDS Forms.

If a Manager is not satisfied with all aspects of an Employee's PMDS Form, he/she can return it to the Employee to be amended and resubmitted. Employees are ultimately responsible for 'Signing Off' the final version of their Forms, without this, each phase is incomplete and the system cannot be updated. Managers can view the latest version and status of their Employees' Forms, together with any Forms archived on ePMDS.

PeoplePoint will manage the administration functions of ePMDS, and will provide a dedicated customer service/help desk service to address any ePMDS or the PMDS queries.

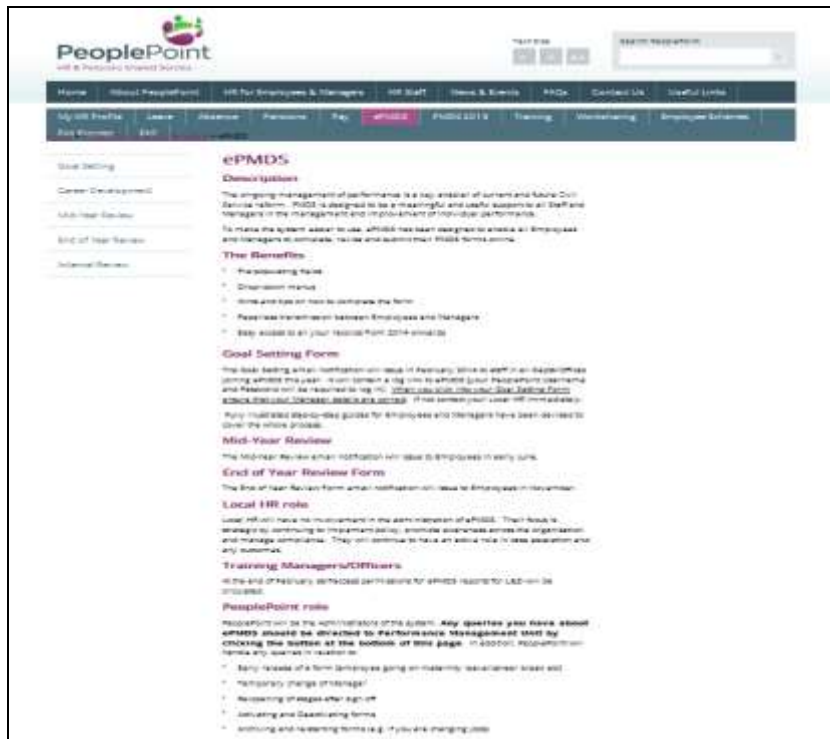
## *How to Guide*

This 'How to Guide' is for Managers and is an addendum to the Employee 'How to Guide', which provides an overview of the ePMDS process, and is the first in the ePMDS 'How to Guide' series. We therefore recommended that Managers familiarise themselves with the Employee 'How to Guide' before reading this Manager's edition.

This 'How to Guide' for Managers is divided into separate self-contained parts, which with the aid of screen shots, offers a 'Step by Step' guide, on how to complete each stage of the ePMDS process.

There are generally three phases in a yearly ePMDS cycle, the *Goal Setting Stage*, the *Mid-Year Review Stage* and the *End of Year Review Stage*, at which time Managers will allocate a final Performance Evaluation. ePMDS has an escalation phase, the *Internal Review*, and Managers will be updated on the outcomes of Staff Internal Reviews, despite having no direct role in this process.

# Information on ePMDS



# ePMDS Manager How to Guide

## Information on ePMDS

### Step by Step Guide

Employees and Managers can access information on Performance Management on the PeoplePoint Portal. Please click [HERE](#) to access the ePMDS pages on the PeoplePoint Portal.

The ePMDS pages provide Employees and Managers with links to relevant circulars, and guidance on the different phases of the ePMDS process. In addition you can raise requests or queries and access ePMDS online at any time.



**Please Note: Remote Workers** without access to the Government network should contact PeoplePoint on 076 107 1000 (Mon – Thurs 9am – 5.45pm, Fri 9am – 5.15pm) for information on PMDS and PMDS processes.

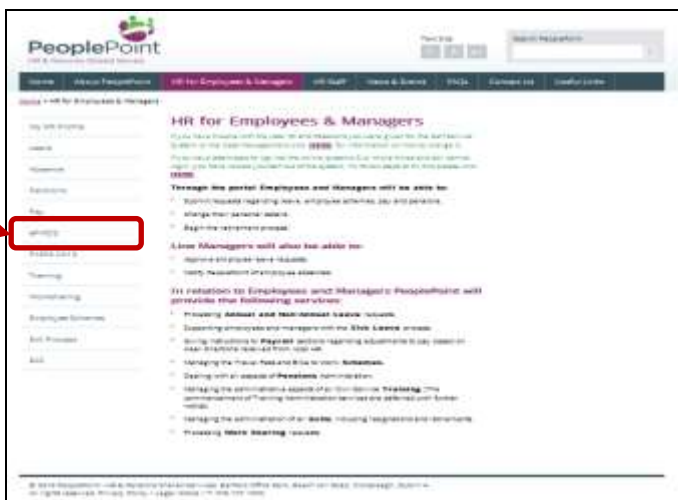
### Step 1: Accessing the PeoplePoint Portal

Visit the PeoplePoint Portal at [peoplepoint.gov.ie](http://peoplepoint.gov.ie).

From the PeoplePoint Portal Home page click on the **HR for Employees & Managers** button.



Once on the **HR For Employees & Managers** page, click on **ePMDS** from the options menu on the left hand side of the page.



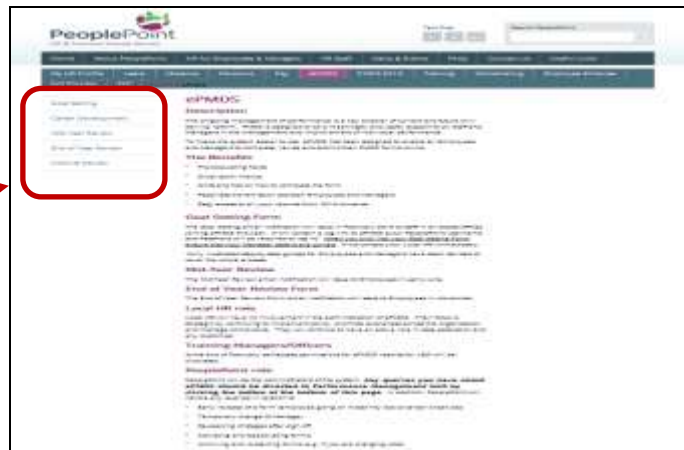
# ePMDS Manager How to Guide

## Step 2: Viewing the ePMDS Menu

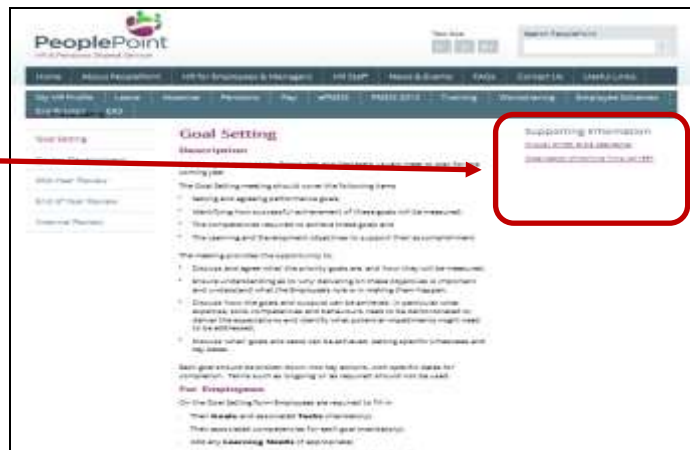
You will be automatically brought to the ePMDS page.

On the left hand side of the page you will see links to various areas of PMDS.

- Goal Setting
- Career Development
- Mid-Year Review
- End of Year Review
- Internal Review



On the right hand side of the page you will see a list of supporting documents including the **relevant Circulars**.



At the end of the ePMDS page you will see three buttons.

You can access ePMDS by selecting the **'ePMDS Login'** button.

You will find information on ePMDS and the process by selecting the **'FAQ'** button.

To raise ePMDS requests or queries click on the **'Submit a Question'** button.



## ePMDS Manager How to Guide

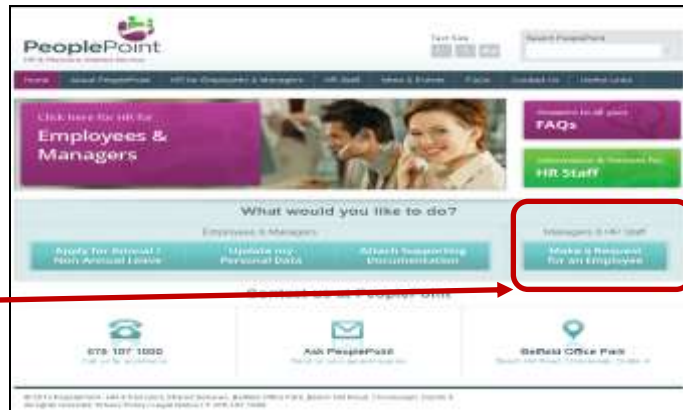


**Please Note:** Managers having technical difficulties or no access to the ePMDS, should raise a case on the **Case Management System** by selecting '**Submit a Question**' button on the ePMDS page on the PeoplePoint Portal.

### Step 3: ePMDS Requests or Queries

To raise a request or query on behalf of an Employee, Managers should visit the PeoplePoint Portal Home page at [peoplepoint.gov.ie](http://peoplepoint.gov.ie).

Managers should click the '**Make a Request for an Employee**' button on the PeoplePoint Portal Home page.



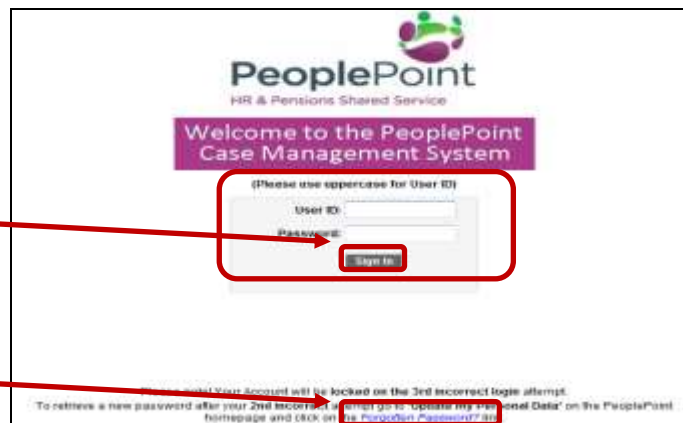
**Please Note:** Managers needing to request the early release of a Form (e.g. Maternity Leave, Career Break etc.), should raise a case on the **Case Management System**.

### Step 4: Log into the Case Management System

This will bring you directly to the **Case Management System log in** page.

Log in using your **PeoplePoint Username** and **Password**, then click **Sign In**.

If you forget your Password, click the **Forgotten Password** link to retrieve a new password.



**Please Note:** Departments joining PeoplePoint will be provided with Usernames and Passwords **before service commencement**. You will have the option to **change** your Password the **first time you log into the system**.



# ePMDS Manager How to Guide

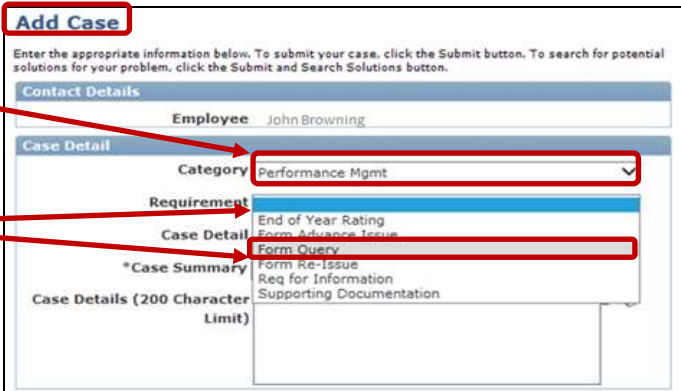
## Step 5: Raising an ePMDS Request or Query

To submit an ePMDS request or query to PeoplePoint click on **Add Case**.



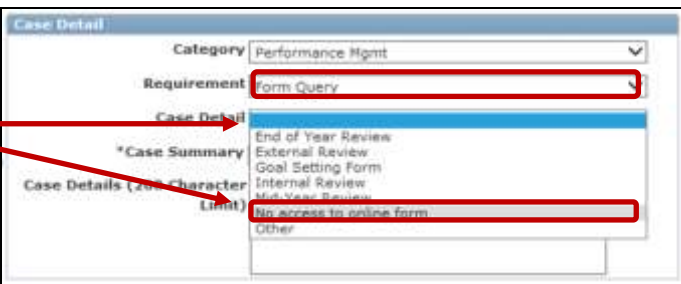
The screenshot shows the Oracle ePMDS Manager interface. The 'Add Case' button is highlighted with a red box. A red arrow points from the text 'click on Add Case' to this button.

In the **Category** field, select **Performance Management**.



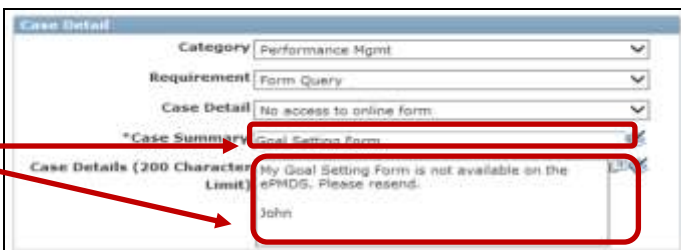
The screenshot shows the 'Add Case' form. The 'Category' field is set to 'Performance Mgmt'. A red box highlights the 'Add Case' button at the top. A red arrow points from the text 'select Performance Management' to the 'Category' dropdown.

In the **Requirement** field select the nature of your request. In this case we have chosen **'Form Query'**.



The screenshot shows the 'Add Case' form. The 'Requirement' field is set to 'Form Query'. A red box highlights the 'Form Query' option in the dropdown. A red arrow points from the text 'select the nature of your request' to this dropdown.

You then select a category under **'Case Detail'**. In this example, we have chosen **'No access to online form'**.



The screenshot shows the 'Add Case' form. The 'Case Detail' field is set to 'No access to online form'. A red box highlights the 'No access to online form' option in the dropdown. A red arrow points from the text 'select a category under Case Detail' to this dropdown.

Complete the **'Case Summary'** and **'Case Details'** free text boxes with your query.



The screenshot shows the 'Add Case' form. The 'Case Summary' field is filled with 'Goal Setting Form'. The 'Case Details' field is filled with 'My Goal Setting Form is not available on the ePMDS. Please resend. John'. A red box highlights the 'Case Summary' and 'Case Details' fields. A red arrow points from the text 'Complete the Case Summary and Case Details' to these fields.

If you need to attach a file, select **'Attach a File'**. To submit click the **'Submit'** button.



The screenshot shows the 'Attachments' section. The 'Attach a File' button is highlighted with a red box. A red arrow points from the text 'select Attach a File' to this button. The 'Submit' button is also highlighted with a red box. A red arrow points from the text 'To submit click the Submit button' to this button.



**Please Note:** Once you submit a query or request to PeoplePoint through the **Case Management System** you will automatically be assigned a **unique Case Number** which is linked to the request/query. You will then receive this unique Case Number by **email from PeoplePoint** acknowledging your submission.



# Accessing ePMDS & Staff Forms

The screenshot displays the ePMDS Manager web application interface. At the top, there is a navigation bar with the ePMDS logo, a 'My PMDS' tab, and a user profile dropdown for 'Joseph Duffy'. The main content area is divided into three sections:

- User Profile:** A blue header bar contains a silhouette icon and a table of user details.

Name	Joseph Duffy
Organisation	Public Expenditure & Returns
Grade	HEO HIGHER SCALE
Manager	Peter White
Email	<a href="mailto:joey.duffy@manx.gov.uk">joey.duffy@manx.gov.uk</a>
- My 2014 PMDS:** A section with a 'Current Status' of 'Goal: Setting - Started'. Below this, it states 'Currently Assigned to: The form is currently assigned to you.' and includes three buttons: 'Main: Assign to this form', 'View Form History', and 'View Manager's guide'.
- My Manager Tasks:** A section titled 'The following PMDS forms are currently assigned to Joseph's pending action.' It features a table with columns for 'Year', 'Jobholder', and 'Status'. Below the table, a message states: 'Your PMDS is currently up to date and you have 0 tasks.'

# ePMDS Manager How to Guide

## Accessing ePMDS & Staff Pages

### Step by Step Guide

Employees and Managers can view information on Performance Management and access ePMDS from the PeoplePoint Portal. Please click [HERE](#) to access the ePMDS pages on the PeoplePoint Portal.

Managers have access to their ePMDS Forms and their staff's Forms from their Home page on ePMDS.



**Please Note:** Manager's responsible for **Remote Workers** without access to the Government network, should ensure that Employees' PMDS Forms are received and returned by post to PeoplePoint. For further information on **PMDS** contact **PeoplePoint** on 076 107 1000 (Mon – Thurs 9am – 5.45pm, Fri 9am – 5.15pm).

### Step 1: Log into ePMDS

At the **end of the ePMDS** page you will see three buttons.

To access ePMDS click on the '**ePMDS Login**' button. This will bring you to the ePMDS Login page.

The screenshot shows the ePMDS page with several sections: 'Self-Assessment (mandatory)', 'Any Feedback you wish to give at this stage (optional)', 'Any additional Career Development comments (optional)', and 'For ease of completion and interactivity there are drop down menus built into the form'. Below these sections are three buttons: 'ePMDS Login', 'ePMDS Home', and 'ePMDS Settings'. The 'ePMDS Login' button is highlighted with a red box, and a red arrow points to it from the text above.

You will need to log into ePMDS using your **PeoplePoint Username and Password**.

Once you have entered your details, click on **Login**.

The screenshot shows the ePMDS Login page with a 'User ID' field, a 'Password' field, and a 'Login' button. The 'Login' button is highlighted with a red box, and a red arrow points to it from the text above. There is also a 'Forgot Password' link and a 'Help' link.

If you **forget your Password**, you can retrieve a new one using the PeoplePoint Portal.



**Please Note:** Your **ePMDS Username and Password** will be the **same as your PeoplePoint Self-Service and your Case Management System Username and Password**.

Departments joining PeoplePoint will be provided with Usernames and Passwords **before service commencement** and you will have the option to change your Password the first time you log into the system.

# ePMDS Manager How to Guide

## Step 2: View Your ePMDS Home Page

You will be automatically brought to **your** ePMDS Home page.

At the top of the page, you will see your **Name and Employment** details.

Under this you will see **'My 2014 PMDS'** and details of the Stage and Status of **your** ePMDS Form.

Below this is the **'My Manager's Tasks'** section, where staff Forms needing to be reviewed are listed.

Year	Staffholder	Status
2014	John Browning	Goal Setting - Submitted to Manager

## Step 3: Access My Staff's Forms from 'My Manager Tasks'

On your Home page, under **'My Manager Tasks'** you will find a list of your staff, who have submitted their ePMDS Forms for review.

Year	Staffholder	Status
2014	John Browning	Goal Setting - Submitted to Manager

To view the Employee's Form click the **'Edit PMDS'** button next to the Employee.

Employee's Forms are uneditable and Managers can **'sign off'** or **'Return to the Job Holder'** for amendments.

## Step 4: Access My Staff's Forms from Home Page Menu

By selecting the **'My Staff'** option from **your Home page** top menu, you will be brought to a page listing your reportees.

Choose an Employee and click the **'View User'** button.

Name	Staff	Status
John Browning	john.browning@hse.ie	HRP - CLERICAL OFF TEND

## ePMDs Manager How to Guide

You will be brought to the **Employee's Home page**, where you can view the **'Current Status'** and stage of the Form.

In this case John Browning has submitted his **Goal Setting Form** to his Manager, and the Form is assigned to you.

The screenshot shows the 'John's 2014 PMDS' form. The 'Current Status' is 'Submitted to Manager'. The 'Currently assigned to' field shows the manager's name. A red box highlights the 'Make a change to this form' button.

As Employee's Form progresses through each stage, the Form's Status will change from **'Started'** to **'Submitted to Manager'** to **'Signed Off'** and finally **'Completed'**.

To view the Employee's Form, select the **'Make a change to this form'** button.

A close-up of the 'Make a change to this form' button, which is highlighted with a red box and a red arrow pointing to it.

Managers can **'sign off'** or **'Return to the Job Holder'** for amendments.

The screenshot shows the '2014 PMDS: Goal Setting' form. It includes fields for Name, Organization, Goals, Manager, and a section for 'Set your goals and objectives for the next 12 months'.

**Please Note:** Managers choosing to return a Form to an Employee should contact the Employee directly with suggested amendments.

At Mid-Year Review and End of Year stages, Employees can select the **'Revert to Manager'** button and return their Form to their Manager and you should review the Form, contact the Job Holder and should choose to **'Return to Job Holder'** or **'Sign off'** the Form.

### Step 5: My Staff's Forms History & Archived Forms

From the Employee's Home page, select the **'View Form History'** button and view a log of this Employee's Form History.

The screenshot shows the 'John's 2014 PMDS' form. The 'View Form History' button is highlighted with a red box and a red arrow pointing to it.

## ePMDS Manager How to Guide

On the **'View Form History'** page, you have **links** to the Employee's Form and can **access saved copies** of the Form as progressed from stage to stage.

Form	Current Stage	Submitted	View
2014	Initial Entry - Completed to Manager	2014-01-01 10:00 am	View
2014	Initial Entry - Completed	2014-01-01 10:00 am	View

You also have a record of the **'user'** and the **date** of each action.

**Managers can view Employees' who have requested Form's to be Archived** by selecting the **'Archived 2014'** button on the Employee's Home page.

Under **'Archived 2014'** you can view a list of the Employee's archived Forms for that year, you click the **'View Forms History'** button to see the History of the Form. (See 'View Form History' page above)

Form	Submitted	Submitted Date	View Form History
2014	2014-01-01	2014-01-01	View Form History
2014	2014-01-01	2014-01-01	View Form History



**Please Note:** Employees needing to archive their PMDS Form, for example starting a new position, should contact raise a case on the **Case Management System**. Alternatively Employees or Managers should contact local HR to request any pre 2014 PMDS Forms.

# 1. The Goal Setting Stage

The screenshot displays the '2014 PMDS - Goal Setting' web application. At the top, there is a header bar with the title '2014 PMDS - Goal Setting'. Below this, a form contains fields for 'Name' (John Doe), 'Email' (john.doe@pmds.org), 'Organization' (Public Education & Health), and 'Address' (1234 Main Street). A section titled 'Select the program you want to track' includes a dropdown menu and a 'Select' button. Below this, there are input fields for 'Number of Goal Setting Steps' (set to 1) and 'Total number of Goal Setting Steps' (set to 1000). The main content area is titled 'Goals' and contains two goal entries. 'Goal 1' has a description, a 'Goal Setting Statement', and a list of 'Targeted Performance Objectives' with checkboxes. 'Goal 2' also has a description and a 'Goal Setting Statement'. The interface is clean and professional, with a light blue and white color scheme.

# ePMDS Manager How to Guide

## How to review the ePMDS Goal Setting Form

### Step by Step Guide

In the Goal Setting Stage, PeoplePoint will send an email notification directing Employees and Managers to complete and submit their ePMDS Goal Setting Forms.

Following a meeting with their staff, Managers will receive an email notification, advising them that their staff have completed and submitted their ePMDS Goal Setting Forms.



**Please Note:** Employees will be given a deadline to complete their ePMDS Goal Setting Form.

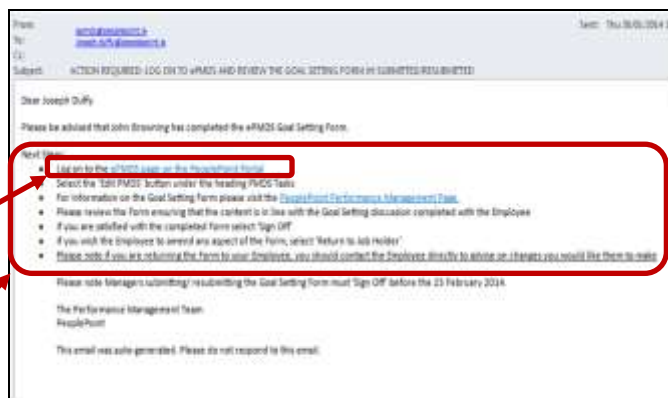
**Remote Workers** without access to the Government network and following a meeting with their Manager will complete an agreed PMDS Goal Setting Form. Managers will return the Form by post to the PMDS Team, PeoplePoint, Building 5, Belfield Office Pk, Clonskeagh, Dublin 4.

### Step 1: Receiving an email notification to review staff's ePMDS Goal Setting Form

You will receive an **email notification** when your staff submit a Goal Setting Form.

You click on the **PeoplePoint Portal link** to access to the ePMDS Login page.

Then follow the email's **list of steps** and review the Employee's Goal Setting Form.

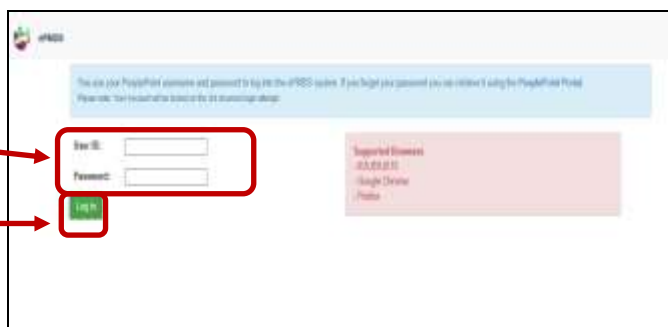


### Step 2: Log into ePMDS

You will need to log into ePMDS using your **PeoplePoint Username and Password**.

Once you have entered your details, click on **Login**.

If you **forget your Password**, you can retrieve a new one using the PeoplePoint Portal.





# ePMDS Manager How to Guide



**Please Note:** Your **ePMDS Username and Password** will be the **same as your PeoplePoint Self-Service** and your **Case Management System Username and Password**.

Departments joining PeoplePoint will be provided with **Username and Passwords before service commencement** and you will have the option to change your Password the first time you log into the system.

## Step 3: View your ePMDS Home page

You will be automatically brought to **your ePMDS Home page**.

At the top of the page, you will see your **Name and Employment** details.

Under this you will see **'My 2014 PMDS'** and details of the Stage and Status of **your** ePMDS Form.

Below this is the **'My Manager's Tasks'** section, where staff Forms needing to be reviewed are listed.

Name	Employment	Status
John Browning	Goal Setting - Submitted to Manager	



**Please Note:** Managers having technical difficulties or no access to the ePMDS or Employees' Forms, or needing to request the early release of a Form (e.g. Maternity Leave, Career Break etc.), should raise a case on the **Case Management System**.

## Step 4: Access the Employee's Goal Setting Form

On your Home page, under **'My Manager Tasks'** you will find a list of your staff, who have submitted their ePMDS Forms for review.

Year	Employee	Status
2014	John Browning	Goal Setting - Submitted to Manager

To view the Employee's Form click the **'Edit PMDS'** button next to the Employee.

2014 PMDS: Goal Setting

Name: John Browning  
Grade: NRP - CLERICAL, OFF TEND  
Organisation: Department of Public Expenditure & Services  
Manager: Joseph Duff  
Section: CS HR Shared Services

What is the purpose of my job?

To provide administrative support for the PeoplePoint Project Team:

Number of Direct Reporting Staff: 0  
Total Number of Direct Reporting Staff: 0

# ePMDS Manager How to Guide



**Please Note:** Employee's Forms are uneditable and Managers can **'sign off'** or **'Return to the Job Holder'** for amendments.

Managers will be given a deadline to review and **'Sign off'** Employees ePMDS Goal Setting Forms.

## Step 5: Review the Employee's Information on the Goal Setting Form

Managers should **check Employee's Information** and provide guidance when completing the **job description, reporting staff and salaries fields.**

Information on direct report average salaries can be found on the PeoplePoint Portal.



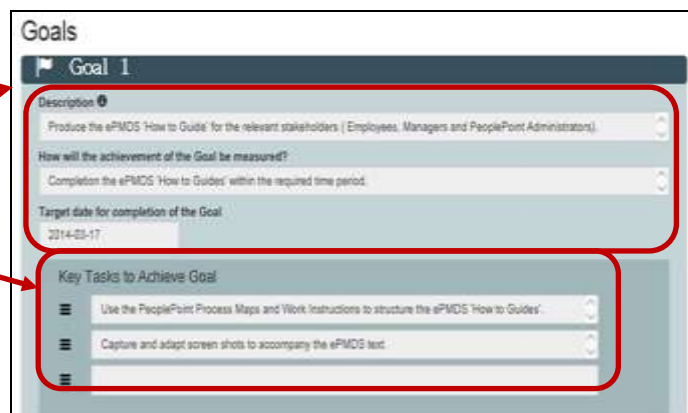
**Please Note:** If your **Manager's details are incorrect** on your ePMDS Form, please contact your Local HR. Local HR will advise PeoplePoint to make the necessary change to your Employee record on HRMS.

For information on ePMDS and to view relevant PMDS Circulars, click [HERE](#) to see the ePMDS pages on the PeoplePoint Portal.

## Step 6: Review the Employee's Goal Setting - PMDS Goals & Competencies

Employees should have between **3 – 5 Goals per year**. Some of these may be continuing yearly objectives.

**'Key Tasks'** should be the practical duties to achieve the Goal.



## ePMDS Manager How to Guide

**Competencies** should be selected relevant to the chosen 'Key Tasks'.

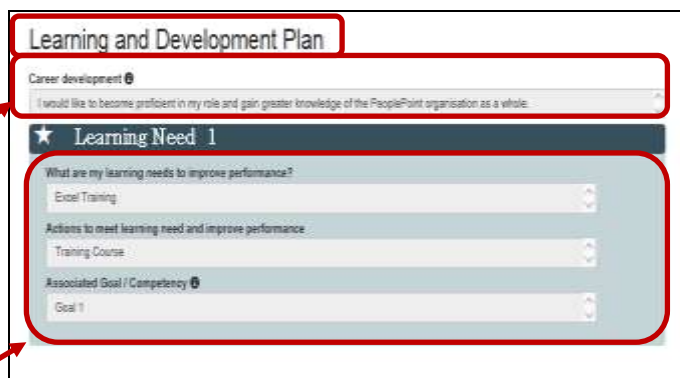


**Please Note:** *Competencies* are listed appropriate to the Employee's **Grade** and are selected from the following groups: Team Work, Information Management/Processing, Delivery of Results, Customer Service and Communication Skills, Drive and Commitment, Specialist Knowledge, Expertise and Self Development.

### Step 7: Review the Employee's Goal Setting - Learning and Development Plan

Under the 'Learning and Development Plan', review the Employee's 'Career Development' remarks.

Ensure that each 'Learning Need' is appropriate to the Goal; the training course (where possible), is from your Department's Training Catalogue, and that the Employee has considered 'on-the-job-training' or 'self-learning' as a Learning Need option.



**Please Note:** For guidance on reviewing the ePMDS Goal Setting Form Managers should click [HERE](#) to refer to the ePMDS pages on the PeoplePoint Portal. For information on Learning & Development courses contact your Training Officer or Local HR.

# ePMDS Manager How to Guide

## Step 8: Assess Employee Goal Setting - Feedback

Managers should review the Employee's feedback especially their responses in the free text fields and explanations for choosing 'Disagree' or 'Strongly Disagree' to any of the statements.

It is recommended that Managers **discuss the Employee's feedback** at the initial meeting before Employees update and submit their ePMDS Goal Setting Form.



**Please Note:** The new Feedback section replaces the previously used 'Upward Feedback', where Employees provided a commentary on **how they were currently being managed**.

Employees have been requested when providing feedback on why they answered 'Disagree' and 'Strongly Disagree' to any of the 5 feedback questions, that they reference the question number as part of their answer.

## Step 9: Sign off an Employee's ePMDS Goal Setting Form

To sign off on an Employee's ePMDS Goal Setting Form click the 'Sign off' button.

The Employee will then receive an **email notification** advising that **Goal Setting Form is complete**.

However, if you wish the Employee to make changes to the Form, you click the 'Return to Job Holder' button.

The Employee will then receive an **email notification** to update and resubmit the ePMDS Goal Setting Form.

# ePMDS Manager How to Guide



**Please Note:** Managers cannot edit the Employee's ePMDS Goal Setting Form. If Managers select 'Return to Job Holder', the Form will be returned to the Employee.

Managers should then **contact the Employee** with the proposed amendments and the **Employee should update and resubmit the Form**. Managers will receive an **email notification** when the Employee resubmits their ePMDS Goal Setting Form.

## Step 10: View Employee's updated Status & Form History

When the Manager 'signs off' on the ePMDS Form, the Employee's Home page status will change to '**Goal Setting - Completed**'.

John's 2014 PMDS

Current Status: Goal Setting - Completed

Currently Assigned to: Not currently assigned to anyone.

View Form View Form History View Manager's goals

When the Manager 'Returns the Form to the Job Holder' the Employee Home page status will change to '**Manager Returned Form to Job Holder**'.

John's 2014 PMDS

Current Status: Goal Setting - Manager Returned Form to the Job Holder

Currently Assigned to: John Browning, NRP - CLERICAL OFF TEMP, Department of Public Expenditure & Reform

View Form View Form History View Manager's goals

Managers can **view the 'View Form History'** page to see a log of the Form history.

Year	Form Title	Status	Manager's Name	Date
2014	Goal Setting - Completed	Completed	John Browning	Jan 20, 2014 10:10 am
2014	Goal Setting - Completed	Completed	John Browning	Jan 20, 2014 10:10 am
2014	Goal Setting - Completed	Completed	John Browning	Jan 20, 2014 10:10 am
2014	Goal Setting - Manager Returned Form to the Job Holder	Completed	John Browning	Jan 20, 2014 10:10 am
2014	Goal Setting - Completed	Completed	John Browning	Jan 20, 2014 10:10 am
2014	Goal Setting - Completed	Completed	John Browning	Jan 20, 2014 10:10 am



**Please Note:** Managers can return the ePMDS Goal Setting Form any number of times to the Employee, and the Goal Setting Stage is only complete when the Manager finally 'signs off' the Form.

# 2. The Mid-Year Review

The screenshot displays the '2014 PMDS : Mid-Year Review' form within the ePMDS Manager interface. The form is titled '2014 PMDS : Mid-Year Review' and includes fields for Name (John Browning), Email (JBP - CLERICAL OFF TEAM), Manager (Joseph Guffy), Organization (Department of Public Expenditure & Reform), and Section (CD HR Shared Services). Below these fields, there is a section for 'What is the purpose of this task?' with a text area containing 'To provide administrative support for the PeoplePoint Project Team'. This is followed by two input fields: 'Number of Direct Reporting Staff' (set to 1) and 'Total Salaries of Direct Reports' (set to 000). The 'Goals' section is titled 'Goal 1' and includes a description, a measurement method, a target date for completion (2014-03-31), and a list of 'Key Tasks to Achieve Goal'. These tasks include 'Use the PeoplePoint/PeoplePoint Help and Work Instructions to develop the ePMDS Help to Support' and 'Ensure that all staff are able to use the ePMDS Help'. Below the tasks, there is a 'Competencies' section with a list of competencies and their corresponding scores. The 'Mid-Year Review' section at the bottom includes a 'Notes' field with the text 'Submitted to achieve' and a 'Comments' field with the text 'Goal delayed due to system review'. The form is set against a light blue background with a white sidebar on the left.

# ePMDS Manager How to Guide

## How to review the ePMDS Mid-Year Review Form

### Step by Step Guide

In the Mid-Year Review Stage (formally the Interim Review), PeoplePoint will send an email notification directing Employees and Managers to complete and submit their ePMDS Mid-Year Review Forms.

Following a meeting with their staff, Managers will receive a further email notification, advising them that their staff have completed and submitted their ePMDS Mid-Year Review Forms.



**Please Note:** Employees will be given a deadline to complete their ePMDS Mid-Year Review Form.

**Remote Workers** without access to the Government network and following a meeting with their Manager will complete an agreed PMDS Mid-Year Review Form. Managers will return the Form by post to the PMDS Team, PeoplePoint, Building 5, Belfield Office Pk, Clonskeagh, Dublin 4.

### Step 1: Repeat - Step 1 & 2 receive email notification & Login to ePMDS

### Step 2: Access your ePMDS Home page

You will be automatically brought to **your** ePMDS Home page.

At the top of the page, you will see your **Name and Employment** details.

Under this you will see **'My 2014 PMDS'** and details of the Stage and Status of **your** ePMDS Form.

Below this are your **Manager's tasks** and staff Forms needing to be completed.

The screenshot shows the ePMDS Home page. Red boxes and arrows highlight the following sections:

- Top Right:** A box containing 'My PMDS' and 'Go Back' links, with an arrow pointing to a 'Logout' link.
- User Profile:** A box containing a user profile picture and details: Name (John Doe), Registration (Government of Ireland), Email (john.doe@goi.ie), and a 'Logout' link.
- My 2014 PMDS:** A box containing 'Current Status' (Draft), 'Submitted' (Submitted), and a 'View My PMDS' link.
- My Manager Tasks:** A box containing a table of tasks.

Name	Address	Status
John Doe	123 Main St, Dublin	Submitted to Manager



**Please Note:** Managers having technical difficulties or no access to the ePMDS or Employees' Forms should raise a case on the **Case Management System**.



## ePMDS Manager How to Guide

### Step 3: Access the Employee's Mid-Year Review Form

On your Home page, under **'My Manager Tasks'** you will find a list of your staff, who have submitted their ePMDS Forms for review.



Year	JobHolder	Status
2014	John Browning	Mid-Year Review - Submitted to Manager

To view the Employee's Form click the **'Edit PMDS'** button next to the Employee.



**Please Note:** Employee's Forms are uneditable and Managers can **'sign off'** or **'Return to the Job Holder'** for amendments.

Managers will be given a deadline to review and **'Sign off'** on an Employee's ePMDS Mid-Year Review Form.

### Step 4: Review the Employee's Information on the Mid-Year Review Form

The ePMDS Form will be titled by year and labelled **'Mid-Year Review'**.



Managers should check Employee's Information.



**Please Note:** If your **Manager's details are incorrect** on your ePMDS Form, please contact your Local HR. Local HR will advise PeoplePoint to make the necessary change to your Employee record on HRMS.

For information on ePMDS and to view relevant PMDS Circulars, click [HERE](#) to see the ePMDS pages on the PeoplePoint Portal.

# ePMDS Manager How to Guide

## Step 5: Review the Employee's ePMDS Mid-Year Review Form

The ePMDS **Mid-Year Review** Form is a **continuation** of the ePMDS **Goal Setting** Form and will be pre-populated with the data the Employee entered on their Goal Setting Form.

Review **each Goal** including the Employee's '**Mid-Year Review**' **Status** and **Comments** fields.

**Goals**

**Goal 1**

**Description**  
Produce the ePMDS 'How to Guide' for the relevant stakeholders (Employees, Managers and PeoplePoint Administrators).

**How will the achievement of the Goal be measured?**  
Completion the ePMDS 'How to Guide' within the required time period.

**Target date for completion of the Goal**  
2014-03-17

**Key Tasks to Achieve Goal**

- Use the PeoplePoint Process Maps and Work Instructions to produce the ePMDS 'How to Guide'.
- Capture and adapt screen shots to accompany the ePMDS test.

**Competencies**

- Takes responsibility for work and takes it through to the appropriate next level.
- Completes work in a timely manner.
- Checks all work thoroughly to ensure it is completed to a high standard.

**Mid-Year Review**

**Status**  
Expected to Achieve

**Comments**  
Guide delayed due to system revision.

Under **Learning and Development Plan**, review the Employee's '**Career Development**' remarks in line with the Employee's Grade and career options.

Review the Employee's '**Mid-Year Review Status**' update and comments.

**Learning and Development Plan**

**Career development**  
I would like to become proficient in my role and gain greater knowledge of the PeoplePoint organization as a whole.

**Learning Need 1**

**What are my learning needs to improve performance?**  
Excel Training

**Actions to meet learning need and improve performance**  
Training Course

**Associated Goal/Competency**  
Goal 1

**Mid-Year Review**

**Status**  
Expected to Achieve

**Comments**  
Postponed due to insufficient applicants.



**Please Note:** Employees have the option to **Add new Goals** at the Mid-Year Review Stage and if completed, to update short term Goals as 'Achieved'.



**Please Note:** Employees have the option to expand on **Career Development** and Add new **Learning Actions** at the Mid-Year Review Stage. For information on Learning & Development courses contact the Training Officer or Local HR.

## ePMDS Manager How to Guide

### Step 6 : Review the Employee's Mid-Year Review - Feedback

Managers should review the Employee's **Mid-Year Review feedback** and actively discuss concerns.

It is recommended that Managers discuss the Employee's feedback at the initial meeting before Employees update and submit their ePMDS Mid-Year Review Form.

**Feedback**

Goal setting: I wish to have a feedback conversation [dropdown]  
I wish to have a feedback conversation [dropdown]

Mid-Year Review: [dropdown]  
End-Year Review: [dropdown]

Goal Setting	Mid-Year Review	End-Year Review
1. I understand my role and my responsibilities	Agree [dropdown]	Strongly Agree [dropdown]
2. I am clear on the value of my job to the Department/Office	Agree [dropdown]	Agree [dropdown]
3. I am happy with how my job is structured	Strongly Agree [dropdown]	Agree [dropdown]
4. I feel work has been equitably distributed across my section	Agree [dropdown]	Agree [dropdown]
5. My Learning and Development Plan has been implemented	Disagree [dropdown]	Strongly Disagree [dropdown]

How can I add value to my role?  
I could take on more responsibility and a supervisory role. [text area]  
Is there any other issue you wish to discuss during the feedback conversation?  
My prospects of taking on a supervisory role at a team leader position. [text area]  
If you answered 'Disagree' or 'Strongly Disagree' to any of the questions above, please state your reasons in the box below.  
In relation to a learning and development plan, regrettably I have had no personal learning plan or development in this role. I am hoping the upcoming course is a step in the right direction. [text area]



**Please Note:** The new Feedback section replaces the previously used 'Upward Feedback', where Employees provided a commentary on **how they were currently being managed**.

Employees have been requested when providing feedback on why they answered '**Disagree**' and '**Strongly Disagree**' to any of the 5 feedback questions, that they reference the question number as part of their answer.

### Step 7: Review the Employee's Mid-Year Review - Self-Assessment

Under the Employee's self-assessment, review the Employee's performance summary.

Ensure that any issues relating to the Employee's underperformance are included, when completing the Manager's assessment.

**Mid-Year Review**

Jobholder's self-assessment  
I feel I have done well achieving my goals, with the exception of goal 1 which was delayed due to a system revision. [text area]

Manager's assessment  
John has worked diligently to achieve goals within deadlines, unfortunately a system revision caused unforeseen delays to the project. [text area]

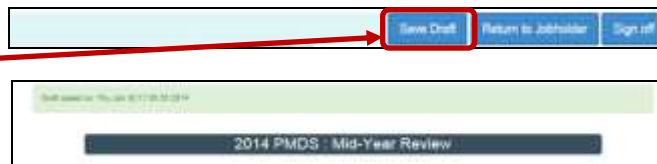


**Please Note:** Managers should **encourage Employees to provide feedback** on any issue particularly those prohibiting them from achieving their short term or yearly Goals.

# ePMDS Manager How to Guide

## Step 8: Save /Sign off the Employee's ePMDS Mid-Year Review Form

If you can click the 'Save Draft' button and your **Form will be saved** and a message will appear in **green** at the **top of the Form**.

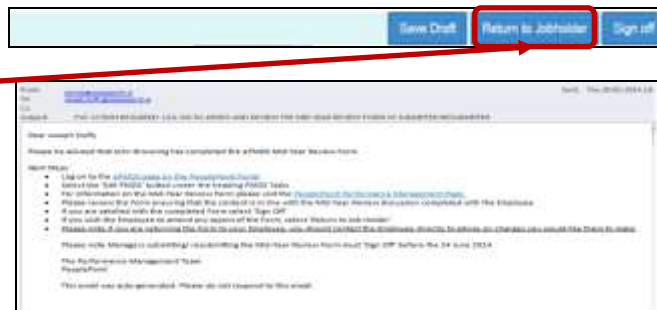


To sign off on an Employee's ePMDS Mid-Year Review Form click the 'Sign off' button.



The Employee will then receive an **email notification** advising that **Mid-Year Review Form is signed off** by the **Manager**.

However, if you wish the Employee to make changes to the Form, you click the 'Return to Job Holder' button.



The Employee will then receive an **email notification** to update and resubmit the ePMDS Mid-Year Review Form.



**Please Note: Managers cannot edit the Employee's ePMDS Mid-Year Review Form. If Managers select 'Return to Job Holder', the Form is returned to the Employee. Managers should *contact the Employee* and discuss the proposed amendments and the *Employee should update and resubmit the Form*.**

*Alternatively if the Employees returns the Form to the Manager. Managers will receive an email **notification** and should contact the Employee to revise the Form's content. Once 'signed off' and returned to the Employee, Managers will receive a further email **notification** when the Employee 'Signs off' their Mid-Year Review Form.*

## Step 9: Status Updated on ePMDS Mid-Year Review Form

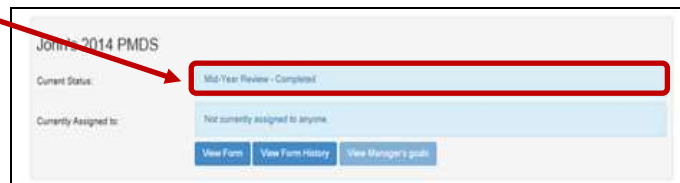
When the Manager 'signs off' on the ePMDS Form, the Employee will receive an **email notification**.



## ePMDS Manager How to Guide

When the Employee **'signs off'** on the ePMDS Form, the Manager will receive an **email notification**.

Also the Employee's Home page status will change to **'Mid-Year Review - Completed'**.



**Please Note:** Employee and Manager can **'Return'** the ePMDS Mid-Year Review Form any number of times between them, and the Mid-Year Review Stage is **only** complete when the Employee finally **'signs off'** the Form.

# 3. The End of Year Review

The screenshot displays the '2014 PMDS End-Year Review' form within the ePMDS Manager interface. The form is titled '2014 PMDS End-Year Review' and includes fields for Name, SSN, Organization, Manager, and Location. Below these fields, there is a section for 'What is the purpose of this goal?' with a text area and a 'Save' button. The 'Goals' section is titled 'Goal 1' and includes a description, a 'View why this process is the best for this goal?' link, a 'Comment on this goal' text area, and a 'Target and the completion of the goal' section. The 'Target and the completion of the goal' section contains a 'Key Tasks to Achieve Goal' list with three items: 'List for Program/Process/Step and task indicators to develop an ePMDS Plan to Goals', 'Establish and assign system goals to develop the ePMDS Plan', and 'Establish and assign system goals to develop the ePMDS Plan'. Below this list is a 'Competencies' section with three items: 'Take responsibility for what is expected through an appropriate indicator', 'Complete work in a timely manner', and 'Check all work thoroughly to ensure it is consistent to a high standard'. The 'Key Task to Achieve Goal' section also includes a 'Status' dropdown menu and a 'Comments' text area. At the bottom of the form, there is an 'End Year Review' section with a 'Name' dropdown menu and a 'Comments' text area. The form is displayed in a browser window with the URL 'http://www.ePMDS.com' visible in the address bar.

# ePMDS Manager How to Guide

## How to review the ePMDS End of Year Review Form

### Step by Step Guide

In the End of Year Review Stage (formally the Annual Review), PeoplePoint will send an email notification directing Employees and Managers to complete and submit their ePMDS End of Year Review Forms.

Following a meeting with their staff, Managers will receive a further notification, advising them that their staff have completed and submitted their ePMDS End of Year Review Forms.

**Please Note:** Employees will be given a deadline to complete their ePMDS End of Year Review Form.

**Remote Workers** without access to the Government network and following a meeting with their Manager will complete an agreed PMDS End of Year Review Form.

*Managers should note that specific evidence to support the End-Year Evaluation of Performance section must be reflected in the Manager's assessment narrative which must be completed.*

*Please note that a PMDS Form submitted without the Manager's assessment narrative will be returned to the Manager for completion.*

Managers will return the Form by post to the PMDS Team, PeoplePoint, Building 5, Belfield Office Pk, Clonskeagh, Dublin 4.

### Step 1: Repeat - Step 1 & 2 receive email notification & Log into ePMDS

### Step 2: Access the Employee's ePMDS End of Year Review Form

You will be automatically brought to your ePMDS Home page.

At the top of the page, you will see your **Name and Employment** details.

Under this you will see **'My 2014 PMDS'** and details of the Stage and Status of your ePMDS Form.

Below this are your **Manager's tasks** and staff Forms needing to be completed.

The screenshot shows the ePMDS Home page. A red box at the top right contains the user's name and employment details. Below this, another red box highlights the 'My 2014 PMDS' section, which includes a progress bar and buttons for 'View My PMDS', 'View My Tasks', and 'View My Staff'. A third red box highlights the 'My Manager Tasks' section, which lists tasks assigned to the manager. Red arrows point from the text on the left to these specific sections.



**Please Note:** Managers having technical difficulties or no access the ePMDS or Employees' Forms, or needing to request the early release of a Form (e.g. Maternity Leave, Career Break etc.), should raise a case on the **Case Management System**.



# ePMDS Manager How to Guide

## Step 3: Access the Employee's End of Year Review Form

On your Home page, under 'My Manager Tasks' you will find a list of your staff, who have submitted their ePMDS Forms for review.

Year	Submitter	Status	
2014	John Browning	End-Year Review - Submitted to Manager	<a href="#">Edit PMDS</a>

To view the Employee's Form click the 'Edit PMDS' button next to the Employee.

2014 PMDS: End-Year Review

Name: John Browning  
Grade: NRP - CLERICAL OFF TEMP  
Manager: Joseph Duffy  
Organisation: Department of Public Expenditure & Reform  
Section: CS HR Shared Services

Number of Direct Reporting Staff:   
Total Number of Direct Reporting Staff:

**Please Note:** Employee's Forms are uneditable and Managers can 'sign off' or 'Return to the Job Holder' for amendments.

Managers will be given a deadline to review and 'Sign off' on an Employee's ePMDS End of Year Review Form.

## Step 4: Review the Employee's Information on the End of Review Form

The ePMDS Form will be titled by year and labelled 'End of Year Review'.

2014 PMDS: End-Year Review

Name: John Browning  
Grade: NRP - CLERICAL OFF TEMP  
Manager: Joseph Duffy  
Organisation: Department of Public Expenditure & Reform  
Section: CS HR Shared Services

Managers should check Employee's Information.

**Please Note:** If your Manager's details are incorrect on your ePMDS Form, please contact your Local HR. Local HR will advise PeoplePoint to make the necessary change to your Employee record on HRMS.

CalFor information on ePMDS and to view relevant PMDS Circulars, click [HERE](#) to see the ePMDS pages on the PeoplePoint Portal.

# ePMDS Manager How to Guide

## Step 5: Review the Employee's ePMDS End of Year Review Form

The ePMDS **Mid-Year Review** Form is a **continuation** of your **ePMDS Goal Setting Form and Mid-Year Review Form** and will be pre-populated with the data from these Forms.

Review **each Goal** including the Employee's '**End of Year Review**' **Status and Comments** fields.

**Goals**

**Goal 1**

**Description:** Provide the annual review for the primary supervisors (Supervisors, Managers and Department Administrators). Review with the achievement of the Goal be measured? Completion by ePMDS 11/30/15 to ensure within the required time period. Target date for completion of the Goal: 2014-02-17

**Key Tasks to Achieve Goal:**

- Use the Performance Review Steps and Work Instructions to achieve the ePMDS Year to Goals.
- Complete and submit the ePMDS Year to Goals.

**Competencies:**

- 1. Tasks responsibility for work and work it through to the appropriate level.
- 2. Complete work in a timely manner.
- 3. Complete all work responsibility for deliverables completed in a timely manner.

**Mid-Year Review:**

Status: Expected to achieve

Comments: Continue to work on the ePMDS Year to Goals.

**End-Year Review:**

Status: Not Achieved

Comments: Year to Goals achieved for the go to date.

Under Learning and Development Plan, review the Employee's '**Career Development**' remarks in line with the Employee's Grade and career options.

Review the Employee's '**End of Year Review Status**' update and comments.

**Learning and Development Plan**

**Career development:**

I would like to become proficient in my role and gain greater knowledge of the management organization as a whole.

**Learning Need 1:**

What are my learning needs to improve performance?

Goal Training:

Action to meet learning need and improve performance:

Training Course:

Associated Goal/Competency:

Goal 1:

**Mid-Year Review:**

Status: Expected to achieve

Comments: Positioned due to sufficient options.

**End-Year Review:**

Status: Not Achieved

Comments: Goal course due to not in the new year and continued on course.



**Please Note:** At the End of Year Review stage, Employees have the option to update your '**Career Development**' statement.

# ePMDS Manager How to Guide

## Step 6: Review the Employee's End of Year Review - Feedback

Managers should review the Employee's **End of Year Review** feedback and actively **discuss concerns**.

It is recommended that Managers discuss the Employee's feedback at the initial meeting before Employees update and submit their ePMDS End of Year Review Form.



**Please Note:** The new Feedback section replaces the previously used 'Upward Feedback', where Employees provided a commentary on **how they were currently being managed**.

Employees have been requested when providing feedback on why they **answered 'Disagree' and 'Strongly Disagree'** to any of the 5 feedback questions, that they reference the question number as part of their answer.

## Step 7: Review the Employee's End of Year Review - Self-Assessment

Review the Employee's End of Year Review self-assessment.

Ensure that any issues relating to the Employee's underperformance are included, when completing the Manager's assessment.

Finally select an 'Evaluation of Performance' from the dropdown menu and the appropriate evaluation summary will appear underneath.

### End-Year Review

## ePMDS Manager How to Guide



**Please Note:** Managers should encourage Employees to provide **feedback** on any issue particularly those prohibiting them from achieving their short term or yearly Goals.



**Please Note:** Managers can choose from the following two Performance Evaluations: Satisfactory and Unsatisfactory. For further information on ePMDS and click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.

### Step 8: Save /Sign off the Employee's ePMDS End of Year Review Form

If you can click the 'Save Draft' button and your **Form will be saved** and a message will appear in **green** at the **top of the Form**.

To sign off on an Employee's ePMDS End of Year Review Form click the 'Sign off' button.

The Employee will then receive an **email notification** advising that **End of Year Review Form** is signed off by the **Manager**.

However, if you wish the Employee to make changes to the Form, you click the 'Return to Job Holder' button.

The Employee will then receive an **email notification** to update and resubmit the ePMDS End of Year Review Form.



**Please Note:** Managers cannot edit the Employee's ePMDS End of Year Review Form. If Managers select 'Return to Job Holder', the Form is returned to the Employee. Managers should **contact the Employee** and discuss the proposed amendments and the **Employee should update and resubmit the Form**.

Alternatively if the Employees **returns the Form to the Manager**. Managers will receive an email **notification** and should contact the Employee to revise the Form's content. Once 'signed off' and returned to the Employee, Managers will receive a further email

# ePMDS Manager How to Guide

**notification** when the **Employee 'Signs off'** their End of Year Review Form.

## Step 9: Status Updated on ePMDS End of Year Review Form

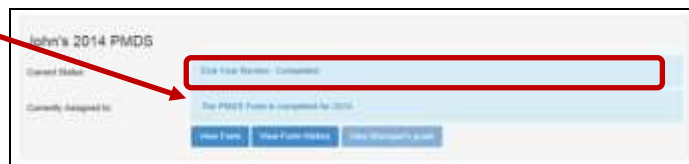
When the Manager **'signs off'** on the ePMDS Form, the Employee will receive an email notification.



When the Employee **'signs off'** on the ePMDS Form, the Manager will receive an email notification.



Also the Employee's Home page status will change to **'Completed'**



**Please Note:** Employee and Manager can **'Return'** the ePMDS End of Year Review Form any number of times between them, and the End of Year Review Stage is **only** complete when the Employee finally **'signs off'** the Form. PeoplePoint will then automatically update the system and authorise any increment that you may be due.



**Please Note:** Employees have the option to select the **'Request Internal Review'** button on their End of Year Review Form and if so, PeoplePoint will advise their Manager by email.

# 4. The Internal Review

The screenshot displays the '2014 PMDS - Internal Review' form within the ePMDS Manager interface. The form is organized into several sections:

- Header:** Displays the title '2014 PMDS - Internal Review' and navigation links for 'Go Home', 'Go Back', and 'New Entry'.
- Form Fields:** Includes fields for 'Name' (set to 'John Doe'), 'Email' (set to 'john.doe@pmhs.org'), 'Manager' (set to 'John Doe'), 'Department' (set to 'Health Services & Support'), and 'Position' (set to 'Health Services Manager').
- Review Period:** A section titled 'What is the review period?' with a text input field for 'The review period is from 1/1/2014 to 12/31/2014'.
- Summary:** Fields for 'Number of Staff Reporting Staff' (set to '1') and 'Total Number of Staff Reported' (set to '1000').
- Goals:** A section titled 'Goals' with a sub-header 'Goal 1: Health Services Manager'. It includes a description of the goal, a list of objectives, and a table for tracking progress.
- Objectives:** A list of objectives for Goal 1, including 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager', 'Increase the number of staff reporting to the Health Services Manager'.
- Comments:** A section for 'Comments' with a text input field.
- Next Steps:** A section for 'Next Steps' with a text input field.
- Final Review:** A section for 'Final Review' with a text input field.

# ePMDS Manager How to Guide

## What the Internal Review Stage means for Managers

### Step by Step Guide

If an Employee is not satisfied with their End of Year Review, they can escalate this to an Internal Review. Employees will have the option to select 'Request Internal Review' at the end of their ePMDS End of Year Review Form.

An Internal Review is the final step in the PMDS process and once completed, PeoplePoint will automatically update the system and authorise any increment that you may be due.



**Please Note:** *Remote Workers* without access to the Government network should submit their End of Year Review Form with a cover note requesting an Internal Review.

Once completed, PeoplePoint will contact **Remote Workers** by post with the Internal Review outcome.

### Step 1: Employee requests an ePMDS Internal Review

To apply for an Internal Review, the Employee selects '**Request Internal Review**' at the end of the ePMDS End of Year Review Form.



**Please Note:** *PeoplePoint* will contact **Local HR** to advise them that an Employee has requesting an Internal Review. Local HR will source an Internal Reviewer and advise PeoplePoint. The Internal Reviewer will be the **Employee's second supervisor**.

### Step 2: Manager receives email notification from PeoplePoint

Managers will receive an **email notification** from PeoplePoint advising that one of their staff has requested an Internal Review.



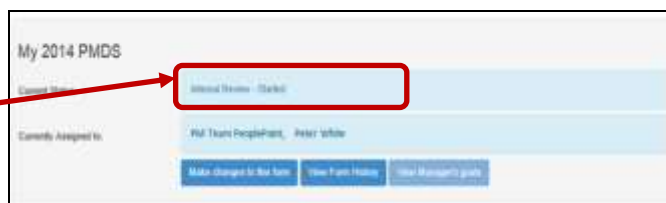
**Please Note:** PeoplePoint will forward the Internal Reviewer the Employee's ePMDS Goal Setting Form, Mid-Year Review Form and End of Year Review Form.



## ePMDS Manager How to Guide

### Step 3: Internal Reviewer Assigned

Once an **Internal Reviewer is assigned**, this will be noted on the Employee's ePMDS Home page.



The screenshot shows the 'My 2014 PMDS' page. A red box highlights the 'Internal Review - Started' status, and a red arrow points from the text 'Internal Reviewer is assigned' to this status.

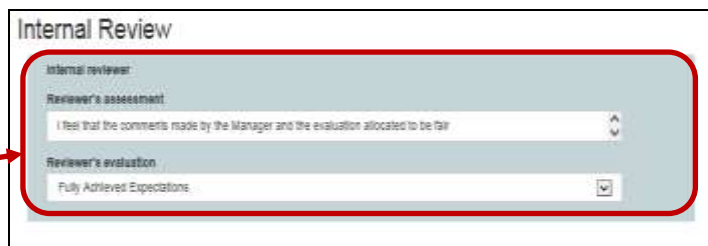
### Step 4: Receiving an email notification Internal Review is complete

Once completed, the Employee's Manager will receive an **email notification** to advise that the Internal Review is complete.



The screenshot shows an email notification from 'pm@peoplepoint.ca' to 'pm@peoplepoint.ca'. The subject is 'NO ACTION REQUIRED: ePMDS INTERNAL REVIEW IS COMPLETE'. The body text states: 'Dear Joseph Duffy, Please be advised that your Reviewing Internal Review is complete. To view a read-only version of the form or to find further information on ePMDS, please visit [www.peoplepoint.ca/ePMDS](http://www.peoplepoint.ca/ePMDS). The Performance Management Team, PeoplePoint. This email was auto-generated. Please do not respond to this email.'

Managers can view the Internal Reviewer comments and Performance Evaluation in the Internal Review section at the end of the Employee's ePMDS Form.



The screenshot shows the 'Internal Review' section. A red box highlights the 'Internal reviewer' and 'Reviewer's assessment' fields. The 'Reviewer's assessment' field contains the text: 'I feel that the comments made by the Manager and the evaluation allocated to be fair'. The 'Reviewer's evaluation' field contains the text: 'Fully Achieved Expectations'.



**Please Note:** An Internal Review is **the final step** in the PMDS process and once completed, PeoplePoint will **automatically update the system** and authorise **any increment** that Employee may be due.

**Please Note:** PeoplePoint will notify the Employee and Local HR on the outcome of your Internal Review.