

EPMS Review Process

Login to Wingspan

Go to the EMPLOYEE DETAIL tab

- ◆ Position Description Link
 - ◆ Use this location to see all of your employees and their corresponding review type and due date
 - ◆ You can also access the Position Description here, if it is available
- ◆ EPMS Link (annually, update software on PC by pressing Ctrl + F5 or Mac with command + R)
 - ◆ Review (Annual, Short Year, Probationary, or Trial)
 - ◆ Create the review document (dates are supplied automatically based on HR system settings, contact our office with any concerns)
 - ◆ Create from scratch - click on the "+" sign next to the employee's name in the list, then click the "triangle" icon to expand the list for the employee as needed
 - ◆ Copy an existing document and update as needed - click the "**copy**" icon next to an existing document, complete prompts as requested
 - ◆ EDIT - use the "**edit**" icon to make changes, view, or print the document
 - ◆ Save often as completing EPMS details
 - ◆ Use the "+" signs to add records as needed
 - ◆ Document Steps
 - ◆ Use the buttons in the yellow status bar at the bottom of the window, from left to right; button will be grayed-out if the option is not yet available
 - ◆ Use the **SAVE** button throughout the create/edit process, recommended after each step
 - ◆ When all information has been entered, click the **SAVE** button then the **VALIDATE** button to ensure there are no errors or missing information
 - ◆ Resolving Errors - click the triangle next to the word "details" to determine corrections needed
 - ◆ After passing the **SAVE** and **VALIDATE** steps, click the **REVIEW** button to submit the document to the Reviewing Officer for approval
 - ◆ Reviewing Officer Steps
 - ◆ Notify the Reviewing Officer that the document is ready for them
 - ◆ The Reviewing Officer will use the **Edit** icon to view and acknowledge the document
 - ◆ To Acknowledge the document - select **SAVE** and then **ACKNOWLEDGE** buttons from the status bar (this step will add the signature of the Reviewing Officer)
 - ◆ Notify the Rating Supervisor that you have completed the document and any changes that are suggested
 - ◆ Final Process
 - ◆ The Supervisor will make any needed changes then **SAVE** and **VALIDATE**
 - ◆ The Supervisor will **print** the document
 - ◆ The Supervisor will meet with the employee (with a printed copy of the current Performance Review as well as the Planning Stage Document for the next year)
 - ◆ After the meeting the Supervisor will **FINALIZE** the review in Wingspan (This button on the status bar will add the supervisor's signature and update HR records)
 - ◆ The Supervisor will notify the Employee to sign the return electronically
 - ◆ The Employee will login to Wingspan, go to the Employee Detail tab, select the EPMS link, "**edit**" the existing review, select the **SAVE** and **ACKNOWLEDGE** buttons to sign the form
 - ◆ Planning Stage Document
 - ◆ Same as the Review process with the exclusion of the Reviewing Officer Steps
 - ◆ Dates need to be manually selected from the calendar tool