



How to Guide

ePMDS

Employee Guide



PeoplePoint

HR & Pensions Shared Service

ePMDS Employee How to Guide

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ePMDS Employee How to Guide

An Overview of ePMDS for Employees

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

ePMDS is a login system, where Employees can view, complete and submit their electronic PMDS Forms to their Manager. Employees can also save the ePMDS Form as a draft if they wish to complete it at a later time, and will receive email notifications alerting them to any actions they need to make and updating them on their PMDS.

PeoplePoint will manage the administration functions of ePMDS, and will provide a dedicated customer service/help desk service to address any ePMDS queries, Employees may have. For further information click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.

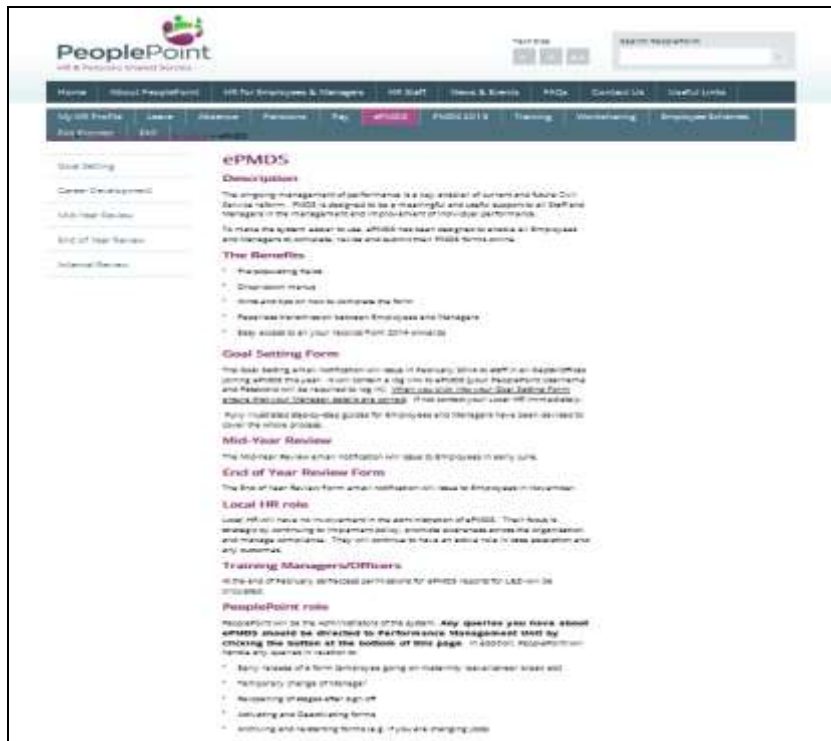
How to Guide

This '*How to Guide*' will provide you with 'Step by Step' instructions on ePMDS. In a yearly cycle there are generally three phases, the *Goal Setting Stage*, the *Mid-Year Review Stage* and the *End of Year Review Stage*, at which time a final Performance Evaluation will be assigned.

If Employees are not satisfied with their Performance Evaluation, they can escalate their End of Year Review Form for an *Internal Review*, which is the final step in the PMDS process.

This '*How to Guide*' is divided into separate self-contained parts, which with the aid of screen shots, will show you how to complete each PMDS stage.

Information on ePMDS



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Information on ePMDS

Step by Step Guide

Employees and Managers can access information on ePMDS 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 their PMDS processes.

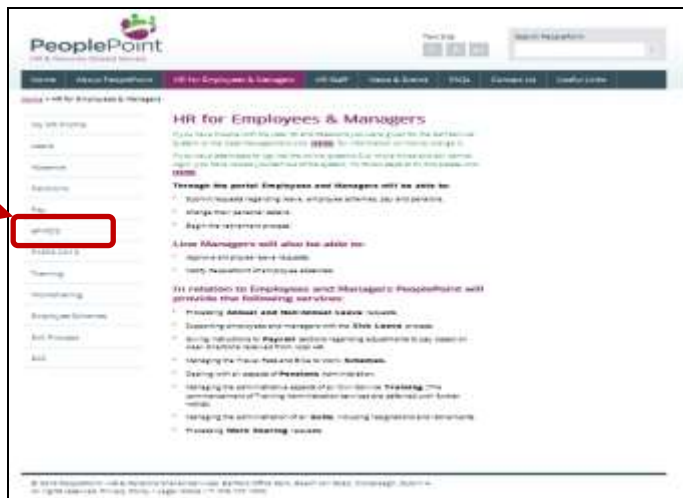
Step 1: Accessing the PeoplePoint Portal

Visit the PeoplePoint Portal at 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** page from the options menu on the left hand side of the page.



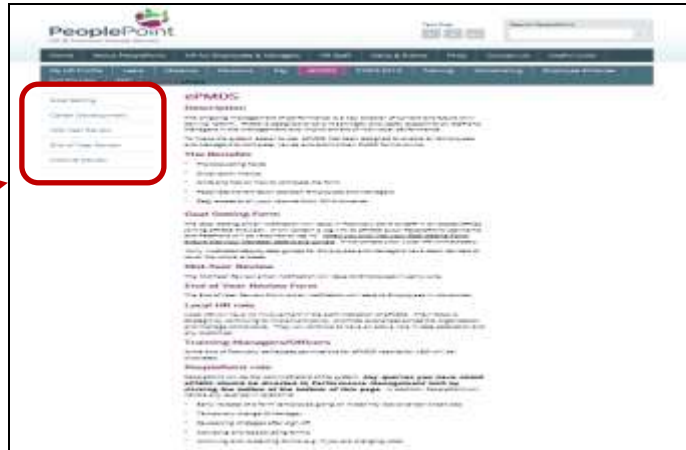
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Step 2: Viewing the ePMDS Menu

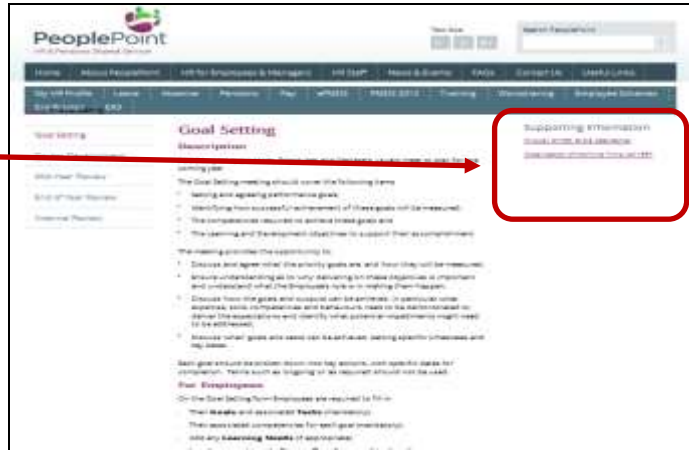
You will be automatically brought to the ePMDS page.

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

- Goal Setting
- 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.



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Step 3: ePMDS Requests or Queries

To make a request or query click the **'Submit a Question'** button.

This will bring you to the **Case Management System** Login page.



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

Step 4: Log into the Case Management System

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 PeoplePoint Usernames and Passwords **before service commencement**. You will have the option to **change** your Password the **first time you log into the system**.

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Step 5: Raising an ePMDS Request or Query

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

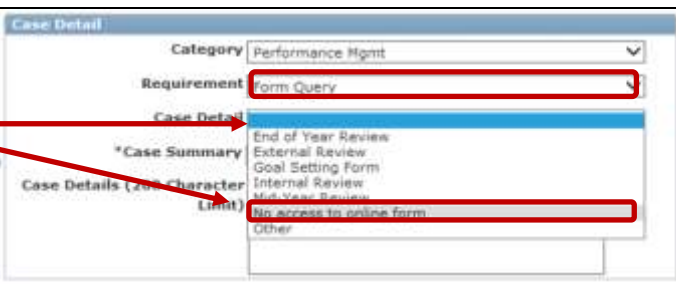


In the **Category** field, select **Performance Management**.

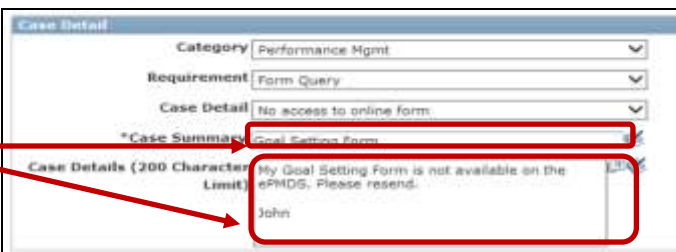


In the **Requirement** field select the nature of your request. In this case we have chosen **'Form Query'**.

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



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

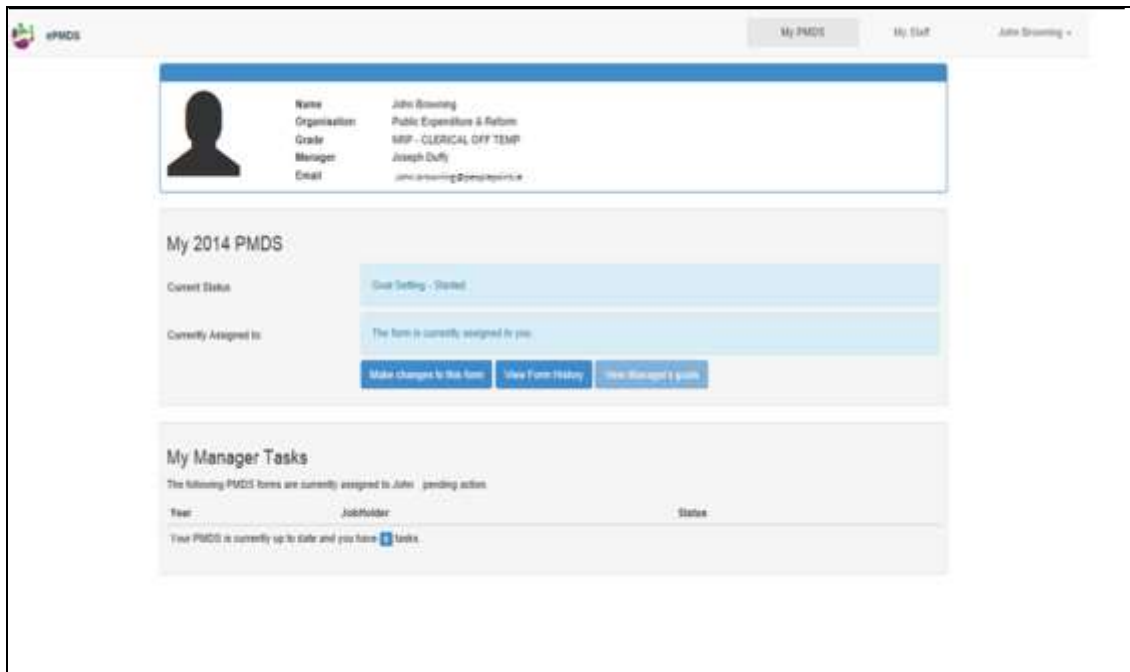


If you need to attach a file, select **'Attach a File'**. To submit click the **'Submit'** button.



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



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Accessing ePMDS

Step by Step Guide

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



Please Note: Remote Workers without access to the Government network will receive PMDS Forms by post and for further information on the PMDS process should contact PeoplePoint on 076 107 1000 (Mon – Thurs 9am – 5.45pm, Fri 9am – 5.15pm).

Step 1: Log in to 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.



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.



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.

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Step 2: View ePMDS Service Pages

You will be automatically brought to your ePMDS Home page.

At the top of the page, you will see your **Name, Organisation, Grade, your Manager and your email address.**

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 reviewed.



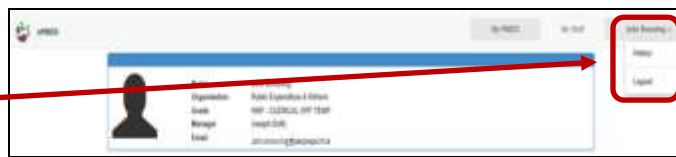
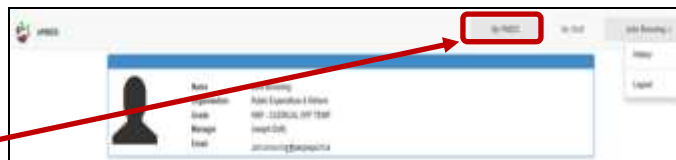
Please Note: Employees who have staff reporting to them, will find staff PMDS Forms waiting to be reviewed in the 'My Manager Tasks' section, and Employees without staff will find zero tasks listed.

On the top of the page, there is a **navigation bar**.

By selecting **'My PMDS'**, you can return to your Home page.

You have dropdown options under your **Name** these are the **'History'** page and a **'Logout'** option.

Under **'History'**, you can view your ePMDS logging history and select **'View Form'** to view your Form.



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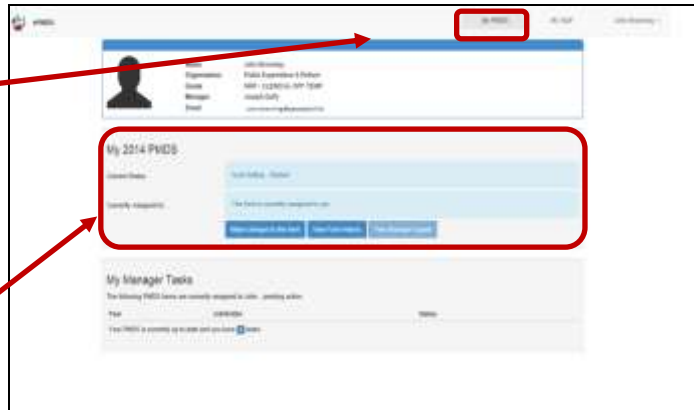
Please Note: Employees who have staff reporting to them, will find a list of staff under the 'My Staff' option on the top navigational bar. Those Employees without staff will find zero staff listed.

Step 3: View your ePMDS Home Page

On your Home page under 'My PMDS', you can view your **current year's PMDS** details.

Here, you will see the Stage and Status of **your** ePMDS Form.

Here, John Browning Current Status is **Goal Setting – Started**, this indicates the beginning of the process.



Please Note: Your ePMDS Form has generally three stages in a yearly cycle: **the Goal Setting Stage, the Mid-Year Review Stage and the End of Year Review Stage.**

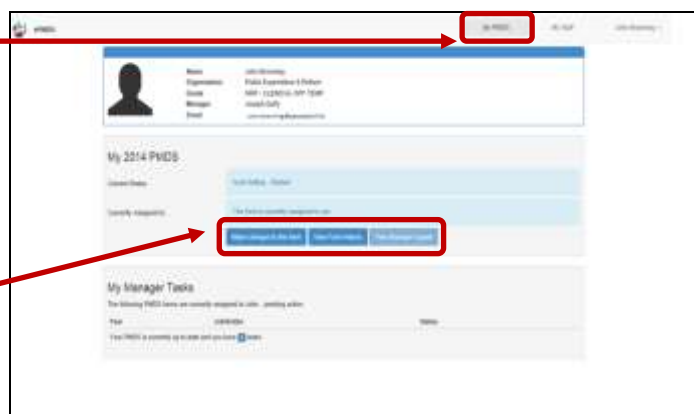


As you progress through each stage, your ePMDS Form's Status will change from '**Started**' to '**Submitted to Manager**' to '**Signed Off**' and finally '**Completed**'.

Additionally at each stage, if your Form is returned to you from your Manager, the Form Status will read '**Manager Returned Form to Job Holder**' and you should update and resubmit the Form.

On your Home page under 'My PMDS', you will find three buttons.

You can select buttons to '**Make Changes to this form**', '**View Form History**' and '**View Manager's goals**'.

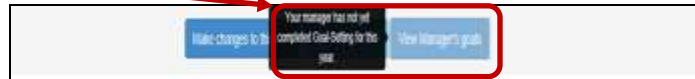


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When you click the **'View Manager's goals'** button, you will be able to see your Manager's current **Goals, Tasks and Competencies** etc.



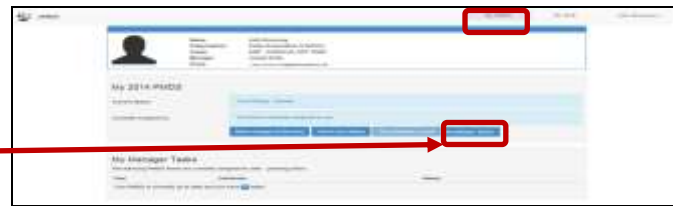
If your Manager has **not yet** submitted a Goal Setting Form, a **'Pop Up' message** will appear.



When you click the **'View Form History'** button, you can view a record of your Form.



Click the links to view your ePMDS Form as it progresses through each Stage and Status.



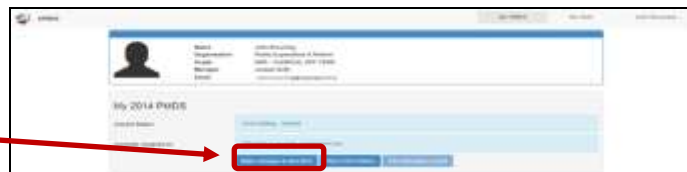
Employees who have requested **PeoplePoint to Archive** their Form will have an **'Archived 2014'** button on their Home page.

Under **'Archived 2014'** you can view a list of your 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)



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.

To Access your current ePMDS Form, select the **'Make changes to this form'**



1. The Goal

Setting Stage

2014 PMDS : Goal Setting

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

What is the purpose of my job?
To provide administration support for the PeoplePart Project Team

Number of Direct Reporting Staff: 0 Total Salaries of Direct Reports: €0.00

Goals

Goal 1

Description: Produce the ePMDS 'How to Guide' for the relevant stakeholders (Employees, Managers and PeoplePart 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
2014-03-14

Key Tasks to Achieve Goal

- Use the PeoplePart Process Maps and Work Instructions to structure the ePMDS 'How to Guide'.
- Capture and adapt screen shots to accompany the ePMDS text.

Competencies

- Takes responsibility for work and sees 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

Save Draft Submit to Manager

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How to complete the ePMDS Goal Setting Form

Step by Step Guide

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



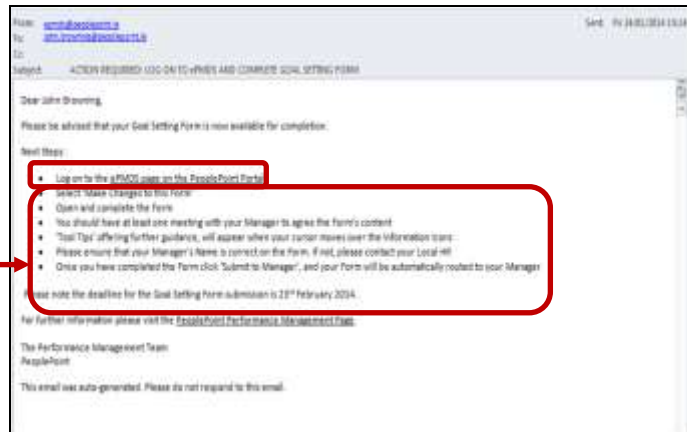
Please Note: Employees should attend at least one meeting with their Manager to agree the Form's content. Employees will have a deadline to complete their ePMDS Goal Setting Form.

Remote Workers without access to the Government network, following a meeting with their Manager, will complete an agreed PMDS Goal Setting Form and 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 complete ePMDS Goal Setting Form

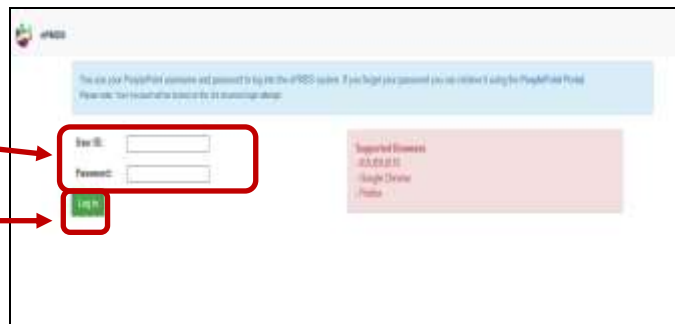
Your **email notification** will ask you to click the **PeoplePoint Portal link** to access to the ePMDS Login page.

You should then **follow the list of steps** and complete your ePMDS Goal Setting Form.



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.



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**

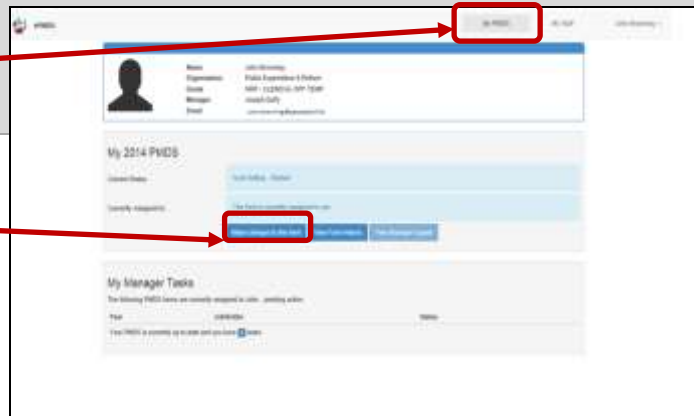
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Step 2: Accessing your ePMDS Goal Setting Form

service commencement and you will have the option to change your Password the first time

You will be brought automatically to the ePMDS Home page.

To Access your current ePMDS Form, select the 'Make changes to this form'.




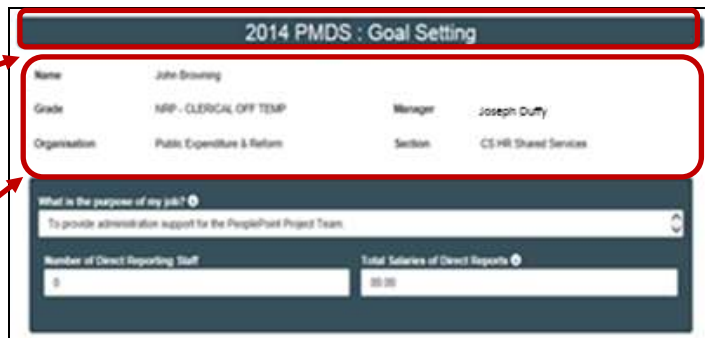
Please Note: As you progress through each stage, your ePMDS Form's Status will change from 'Started' to 'Submitted to Manager' to 'Signed Off' and finally 'Completed'.

Step 3: Viewing your ePMDS Goal Setting Form

At this stage your ePMDS Form will be titled by year and labelled 'PMDS: Goal Setting'.

Beneath this you will find your Name, Grade, Organisation, your Manager and Section.

Check your Manager's details are correct. If these details are incorrect contact your Local HR (see  below).



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.

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You should complete the **blank/white** question fields.



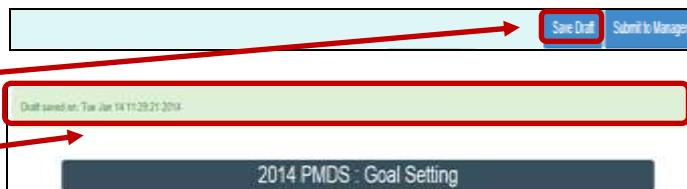
'**Tool Tips**' will appear when you move your cursor over the **Information Icons**. These will guide you to a better understanding, of what information is required in each field.

This links your role and the Strategic Objectives of the organisation – as set out in the Business Plan / Statement of Strategy of your organisation.



When these are **coloured grey** they **cannot** be edited.

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**.



If you have clicked the '**Submit to Manager**' button and you have **not** completed **all mandatory fields**, a message will appear in **red**, **at the top of the Form** and the blank mandatory fields will be highlighted in red on the Form.



Once completed you will be able to resubmit the Form by clicking '**Submit to Manager**'.



Please Note: Employees 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**.

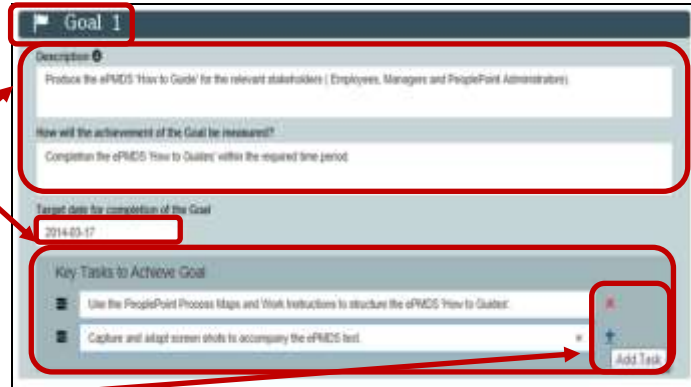
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Step 4: Setting ePMDS Goals, Tasks & Competencies

Populate the Goal fields with realistic but challenging Goals, and explanations of how and when these will be measured.

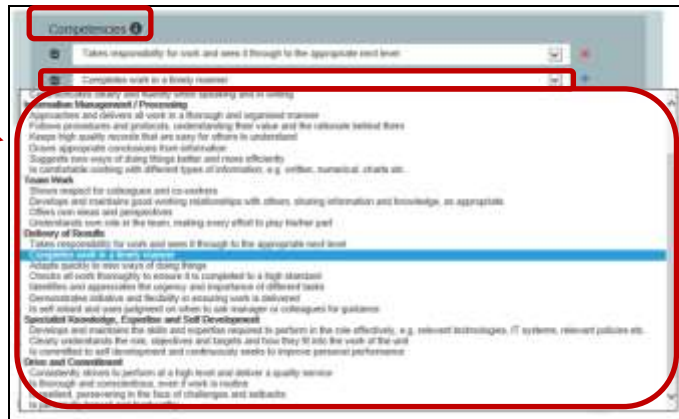
'Key Tasks' are assigned to achieve each Goal.

To Add a Task you click the Plus (+) Symbol beside the previous Task. To Delete close (X) the Key Task.

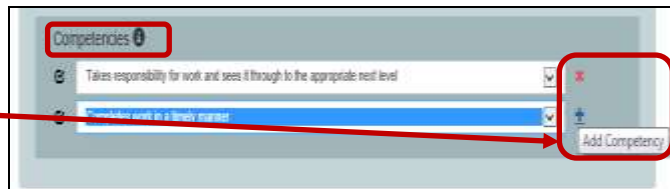


You then select Competencies for your Goal by choosing from the options on the dropdown menu.

Competencies list will be appropriate to your Grade.



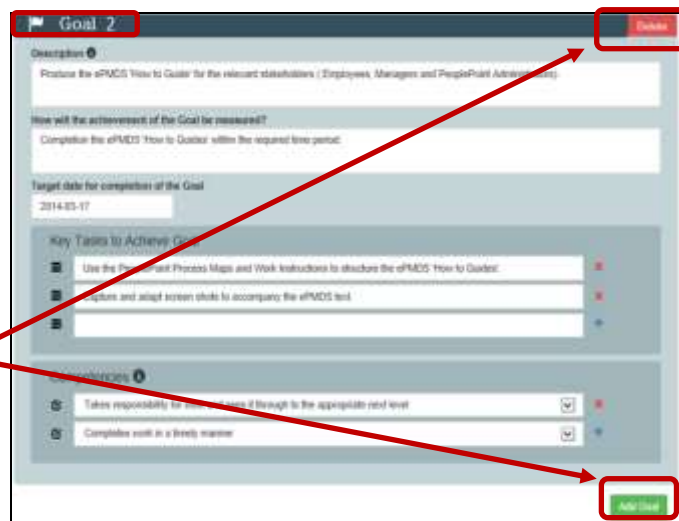
To Add a Competency you click the Plus (+) Symbol beside the previous Competency. To Delete close (X) the Competency.



You should set between 3 – 5 Goals per year.

For more information click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.

You can add Goals by clicking on the 'Add Goal' button. To Delete, you select the 'Delete' button.



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Please Note: Employees should have at least one meeting with their Manager to discuss and agree the ePMDS Goal Setting Form's content.

Please Note: Goal 1 is a **mandatory panel** and must be completed before submitting your Form. The **'Delete this Goal'** button will appear on each Goal panel with the exception of Goal 1.

Step 5: Completing Your Learning and Development Plan

Under your **'Learning and Development Plan'**, write a brief note on your career aspirations in the **'Career Development'** box.

Highlight a **'Learning Need'**, an **Action** to meet this learning need, and note which **Goal** number this relates to.

To Add a **'Learning Need'** you click **'Add Learning Need'**. To Delete select the **'Delete'** button.

Step 6: Providing Feedback

In the Feedback section, you can select two options from the dropdown menu. If you **'do not want to have a feedback conversation'**, select this option.



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

It is recommended that Employees discuss **any feedback with their Managers** at the initial meeting before updating and submitting their ePMDS Goal Setting Form.

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If you **wish to have a feedback conversation**, select this option, and complete the Feedback section.

Respond to the 5 questions by selecting **'Strongly Agree', 'Agree', 'Disagree' or 'Strongly Disagree'** from the dropdown options under **'Goal Setting'**.

You can provide feedback in the **two free text fields** and finally an **opportunity to say** why you answered **'Disagree' or 'Strongly Disagree'** to any of the above 5 questions.



Please Note: When you provide feedback on why you answered **'Disagree'** and **'Strongly Disagree'** to any of the 5 questions above, please reference the question number 1 to 5 as part of your answer.

Step 7: Submit your ePMDS Goal Setting Form to your Manager

When your ePMDS Goal Setting Form is complete, send this to your Manager by clicking the **'Submit to Manager'** button.

You will return to **your Home page** and a **message** will appear in **green** advising that your Form has been submitted to your Manager.

Alternatively, if you only complete part of your Form, 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**.

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Please Note: Your Manager will review your ePMDS Goal Setting Form and have the option to 'Sign off' your Form or 'Return to Job Holder' i.e. return your Form to you for revision.

If your Form has been returned to you, your **Manager will contact** you to agree changes. You should then **update and resubmit** the Form on ePMDS.

When you submit your Form, your 'Current Status' will show 'Goal Setting – Submitted to Manager'.

The screenshot shows the 'John's 2014 PMDS' interface. The 'Current Status' is 'Goal Setting - Submitted to Manager'. Below it, a message states: 'This form cannot be edited as it is currently assigned to your Manager'. There are buttons for 'View Form', 'View Form History', and 'View Manager's goals'.

Your Form will be assigned to your Manager and you will not be able to edit the content.

Once your Manager 'signs off' your Form, you will receive an email notification and your 'Current Status' will change to 'Completed'. (See  below).

The screenshot shows the 'My 2014 PMDS' interface. The 'Current Status' is 'Goal Setting - Completed'. Below it, a message states: 'This form is currently assigned to you'. There are buttons for 'View Form', 'View Form History', and 'View Manager's goals'.

However, if your Manager returns your ePMDS Form to you for amendments, the Current Status will show, 'Manager Returned Form to Job Holder'.

The screenshot shows the 'John's 2014 PMDS' interface. The 'Current Status' is 'Goal Setting - Manager Returned Form to the Job Holder'. Below it, a message states: 'This form is currently assigned to you'. There is a button for 'Make changes to this Form' and buttons for 'View Form', 'View Form History', and 'View Manager's goals'.

You should edit and resubmit your Form by selecting the 'Make changes to this Form' button.



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

Managers will be given a deadline to review and 'Sign off' on an Employee's ePMDS Goal Setting Form.

2. The Mid-Year Review Stage

The screenshot displays the '2014 PMDS - Mid-Year Review' form. At the top, it shows the title and user information: 'User: [Name]', 'Role: [Role]', 'Manager: [Manager Name]', 'Department: [Department]', and 'Section: [Section]'. Below this, there is a section for 'What is the purpose of this goal?' with a text area and two input fields for 'Number of Goals Reporting Staff' and 'Year Review of Goal Report'. The 'Goals' section is expanded to show 'Goal 1' with a 'Goal Setup' button. The goal details include a description, a list of 'Key Tasks to Achieve Goal', and a 'Completion' section with checkboxes and input fields. At the bottom, there is a 'Mid-Year Review' section with 'Status' and 'Comments' fields. A 'Save Goal' button is visible at the bottom right of the form.

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How to complete 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 to access ePMDS and complete their ePMDS Mid-Year Review Forms.



Please Note: Employees should attend at least one meeting with their Manager to agree the Form's content. Employees will have a deadline to complete their ePMDS Mid-Year Review Form.

Remote Workers without access to the Government network, following a meeting with their Manager, will complete an agreed PMDS Mid-Year Review Form and 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

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.



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

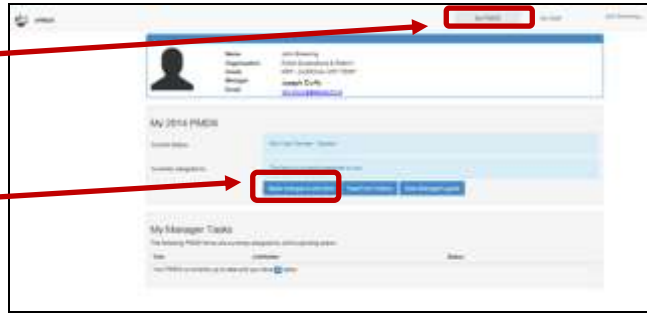
Departments joining PeoplePoint will be provided with **Usernames and Passwords before service commencement** and you will have the option to change your Password the first time you log into the system.

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Step 2: Accessing your ePMDS Mid-Year Review Form

You will be brought automatically to the ePMDS Home page.

To Access your current ePMDS Form, select the 'Make changes to this form'.

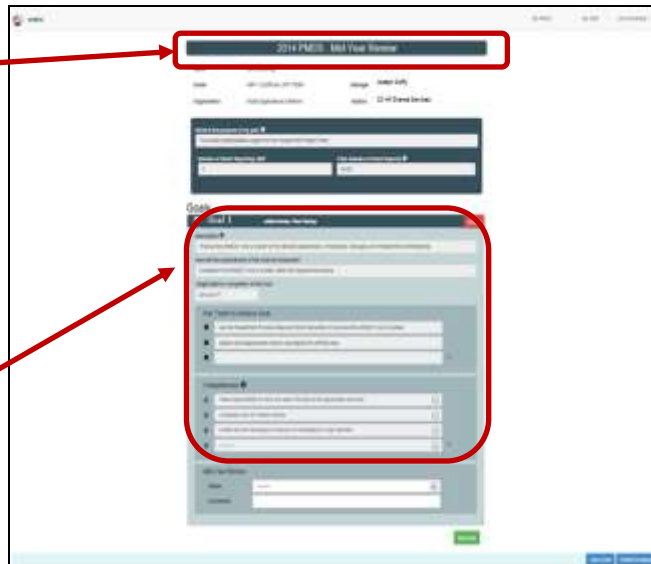


Please Note: As you progress through each stage, your ePMDS Form's Status will change from 'Started' to 'Submitted to Manager' to 'Signed Off' and finally 'Completed'.

Step 3 : Viewing your ePMDS Mid-Year Review Form

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

Your ePMDS Mid-Year Review Form is a continuation of your ePMDS Goal Setting Form and will be pre-populated with the data you entered on your Goal Setting Form.



Please Note: If your Manager's details are incorrect on your ePMDS Form, please contact your Local HR.



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

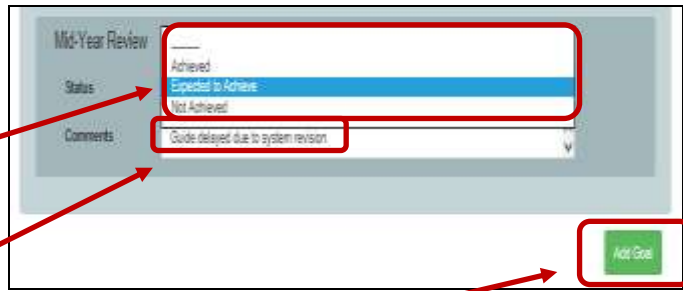
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Step 4: Update your Mid-Year Status, on your PMDS Goals

At the end of each Goal you need to choose a **Mid-Year Review Status** update from the dropdown options, **'Expected to Achieve', 'Achieved' or 'Not Expected to Achieve'**.

Then make your remarks the **'Mid-Year Review 'Comment' box**.

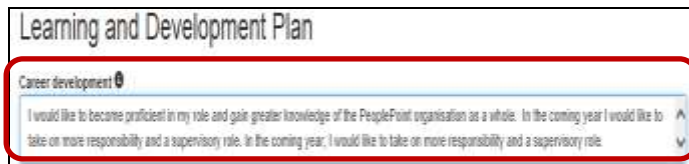
To Add a new **Goal** at the Mid-Year Review Stage, you click the **'Add Goal'** button.



Please Note: At the Mid-Year Review Stage, you cannot edit your Goals, Tasks or Competencies submitted at the Goal Setting Stage.

Step 5: Update your Learning and Development Plan at your Mid- Year Review

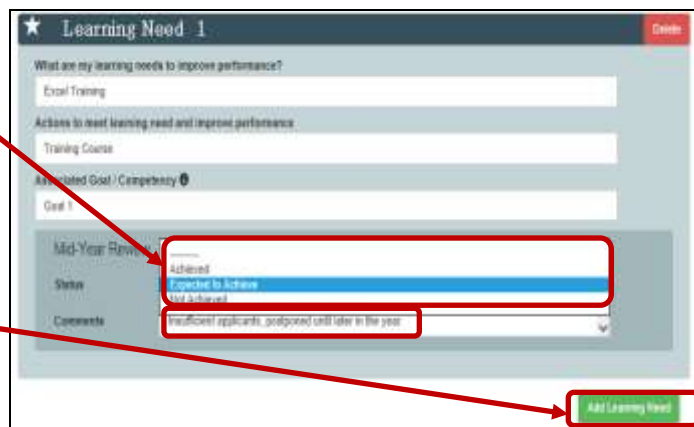
At Mid-Year, you have the option to update your **'Career Development'** statement in the comment box.



At the end of your **Learning and Development Plan**, you will need to provide an update in the **'Mid-Year Review' Status and comment fields**.

To Add a new **'Learning Need'** at the Mid-Year Review Stage, you click the **'Add Learning Need'** button.

For **more information** click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.




Please Note: At the Mid-Year Review Stage, you can update your Career Development statement and add new Goals and Learning Needs.

ePMDS Employee How to Guide

Step 6: Providing Mid-Year Feedback

In the **Feedback section**, you can view your Feedback from your ePMDS Goal Setting Form.

At Mid-Year, you can select two options if you **do not wish to have a feedback conversation**, select this option.


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

It is recommended that Employees discuss **any feedback with their Managers** at the initial meeting before updating and submitting their ePMDS Mid-Year Review Form.

If you **wish to have a feedback conversation**, select this option, and complete the Feedback section.

Respond to the 5 questions by selecting **'Strongly Agree', 'Agree', 'Disagree' or 'Strongly Disagree'** from the dropdown options under **'Mid-Year Review'**.

You can provide feedback in the **two free text fields** and finally an **opportunity to say** why you answered 'Disagree' or 'Strongly Disagree' to any of the above 5 questions.

 **Please Note:** When you provide feedback on why you answered 'Disagree' and 'Strongly Disagree' to any of the 5 questions above, please reference the question number 1 to 5 as part of your answer.

ePMDS Employee How to Guide

Step 7: Providing Mid-Year Self-Assessment Feedback

The last section in the ePMDS Mid-Year Review Form is **your self-assessment**.

Complete this **text box** with a summary of your performance to date.



The screenshot shows the 'Mid-Year Review' form. The 'Jobholder's self-assessment' section is highlighted with a red box. Below it, a text box contains the text: 'I feel I have done well achieving my Goals, with the exception of Goal 1 which was delayed due to a system revision'. The 'Manager's assessment' section is also visible below.

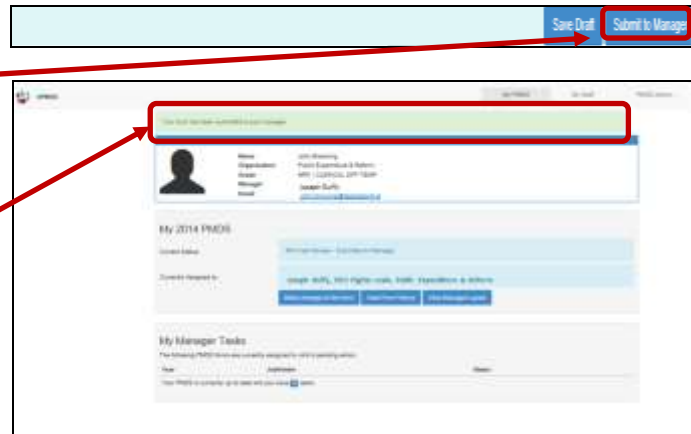
Please Note: To make Performance Management effective **you should review your performance** on a regular basis. This is your opportunity to assess your performance particularly in relation to this year's Goals and Key Tasks.

Employees are **encouraged to provide feedback** on any issue especially those prohibiting them from achieving their short term or long term Goals.

Step 8: Submit your ePMDS Mid-Year Review Form to your Manager

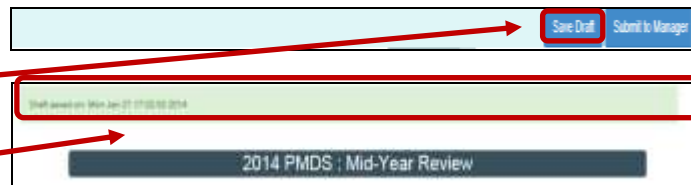
When your ePMDS Mid-Year Review Form is complete, send this to your Manager by clicking the **'Submit to Manager'** button.

You will return to your Home page and a **message** will appear in **green** advising that your Form has been submitted to your Manager.



The screenshot shows the ePMDS Home page. At the top right, there are 'Save Draft' and 'Submit to Manager' buttons. A red box highlights the 'Submit to Manager' button. Below, a green message box is visible, indicating that the form has been submitted to the manager. The page also shows a user profile and 'My 2014 PMDS' section.

Alternatively, if you only complete part of your Form, 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**.



The screenshot shows the ePMDS Home page. At the top right, there are 'Save Draft' and 'Submit to Manager' buttons. A red box highlights the 'Save Draft' button. Below, a green message box is visible, indicating that the form has been saved. The page also shows a user profile and 'My 2014 PMDS' section.

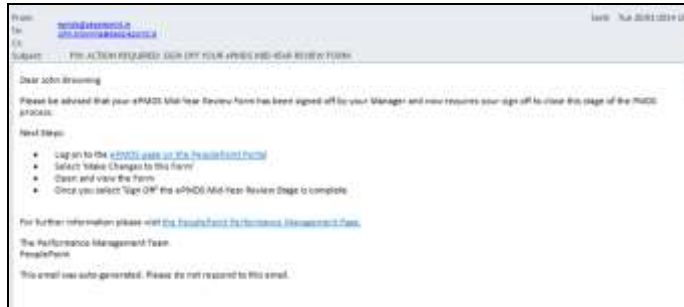
ePMDS Employee How to Guide



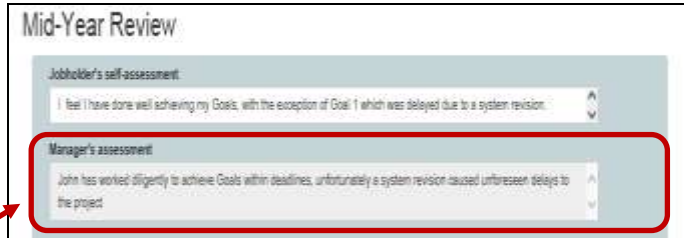
Please Note: Your Manager will review your **ePMDS Mid-Year Review Form** and have the option to **'Sign off'** your Form or **'Return to Job Holder'** i.e. return your Form to you for revision. If your Form has been returned to you, your **Manager will contact** you to agree changes. You should then **update and resubmit** the Form on ePMDS.

Step 9: Sign off on your ePMDS Mid-Year Review Form

Once your Manager **'signs off'** on your Form, you will then receive an **email notification** advising you to **'Sign off'** on your ePMDS Mid-Year Review Form.



Log into ePMDS and select the **'Make a change to this form'** button and open your Form.



Check your ePMDS Mid-Year Review Form and view your **'Manager's assessment'**.

If you are are satisfied with your Form, select **'Sign off'**.



If you are not satisfied select **'Revert to Manager'** and the Form will return to your Manager.



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

Employees will be given a deadline to **'Sign off'** on their ePMDS Mid-Year Review Forms.

3. The End of Year Review Stage

The screenshot displays the 'End of Year Review' form in the ePMDS system. The form is titled 'PMDS 2014 - End of Year Review' and includes fields for 'Name' (Joseph Duffy), 'Title' (VP - Customer Support), 'Manager' (Joseph Duffy), and 'Department' (IT - IT Services). Below this, there are sections for 'Start & End Dates of the year', 'Number of Good Reporting Days', and 'Total Number of Good Reports'. The 'Goals' section is expanded to show a list of goals with checkboxes for completion. The 'Self-Appraisal' section includes fields for 'Self-Appraisal' and 'Comments'. The 'End of Year Review' section includes a 'Date' field. The form is set against a light blue background with a white border.

ePMDS Employee How to Guide

How to complete 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 to access ePMDS and complete the ePMDS End of Year Review Forms.



Please Note: Employees should attend at least one meeting with their Manager to agree the Form's content. Employees will have a deadline to complete their ePMDS End of Year Form.

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

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.



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 Employee How to Guide

Step 2: Accessing your ePMDS End of Year Review Form

You will be brought automatically to the ePMDS Home page.

To Access your current ePMDS Form, select the 'Make changes to this form'.

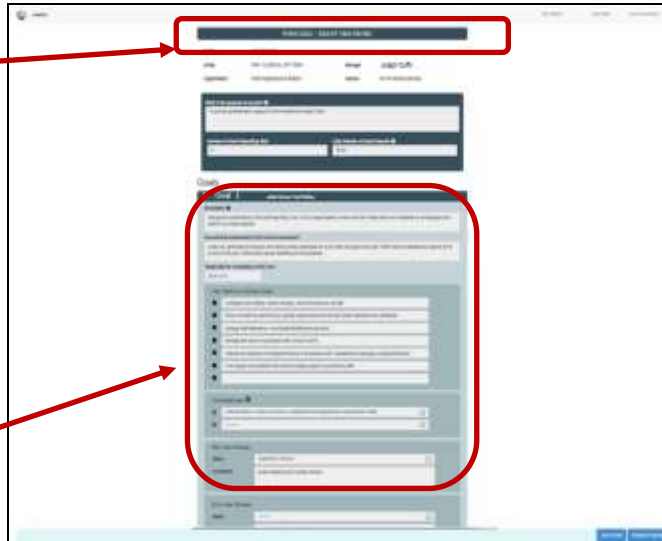


Please Note: As you progress through each stage, your ePMDS Form's Status will change from 'Started' to 'Submitted to Manager' to 'Signed Off' and finally 'Completed'.

Step 3: Viewing your ePMDS End of Year Review Form

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

Your ePMDS End of Year Review Form is a continuation of your ePMDS Goal Setting and Mid-Year Review Forms and will be pre-populated with the data you entered during those stages.



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



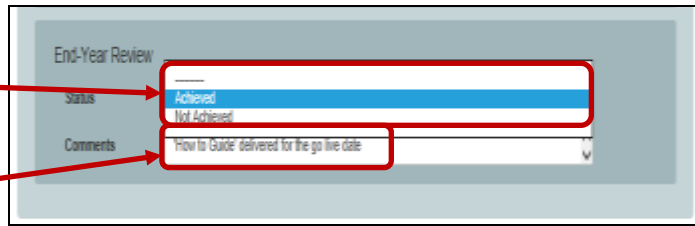
Please Note: Employees having technical difficulties or no access to the ePMDS or Employees' Forms, or needing to request the early release of a Form (e.g. Maternity Leave, Career Break etc.), should raise a case on the Case Management System.

ePMDS Employee How to Guide

Step 4: Update your End of Year Status, on your PMDS Goals

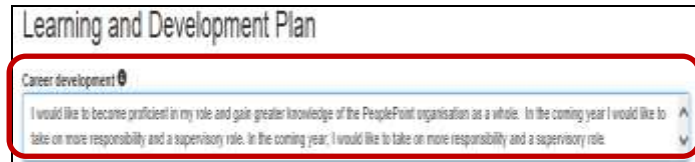
At the end of each Goal you need to choose an **End of Year Review Status** update from the dropdown options, **'Achieved'** or **'Not Achieved'**.

Then make your remarks in the **'End of Year Review Comment'** box.



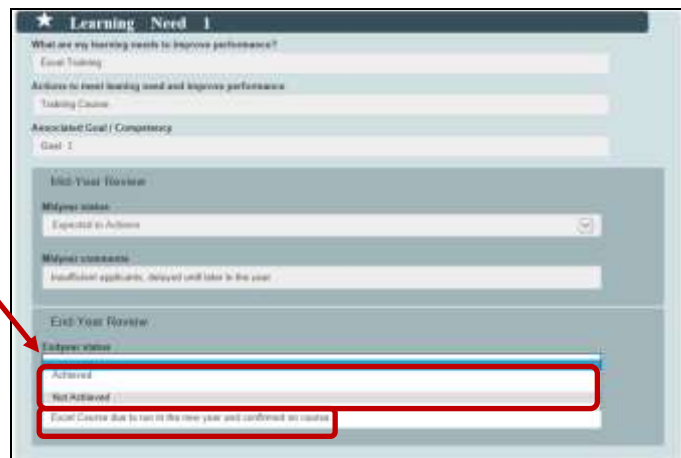
Step 5: Update your Learning and Development Plan at your End of Year Review

At End of Year, you have the option to update your **'Career Development'** statement in the comment box.



At the end of your **Learning and Development Plan**, you will need to provide an update in the **'End of Year Review'** Status and comment fields.

For **more information** click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.




ePMDS Employee How to Guide

Step 6: Providing End of Year Feedback

In the **Feedback section**, you can view your Feedback from your Goal Setting and Mid- Year Review Stages.

The screenshot shows the 'Feedback' section with three stages: Goal setting, Mid-Year Review, and End-Year Review. Each stage has a dropdown menu. The 'End-Year Review' dropdown is highlighted with a red box and contains two options: 'I wish to have a feedback conversation' and 'I do not wish to have a feedback conversation'.

At End of Year, you can select two options if you **‘do not wish to have a feedback conversation’**, select this option.

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


It is recommended that Employees discuss **any feedback with their Managers** at the initial meeting before updating and submitting their ePMDS End of Year Review Form.

If you **‘wish to have a feedback conversation’**, select this option, and complete the Feedback section.

The screenshot shows the 'Feedback' section with 5 questions and two free text fields. The 'End-Year Review' dropdown is highlighted with a red box. The 5 questions are: 1. I understand my role and my responsibilities, 2. I am clear on the value of my job to the Department/Office, 3. I am happy with how my job is structured, 4. I feel work has been equitably distributed across my section, 5. My Learning and Development Plan has been implemented. The 'End-Year Review' dropdown is highlighted with a red box and contains five options: 'Agree', 'Disagree', 'Strongly Agree', 'Disagree', and 'Strongly Disagree'. The two free text fields are highlighted with red boxes and contain the following text: 'I would like to take on more responsibility and a supervisory role. In the long term, is there any other issue you want to discuss during the feedback conversation?' and 'My prospects of taking on a supervisory role or a team leader position'. The second free text field contains the text: 'If you answered ‘Disagree’ or ‘Strongly Disagree’ to any of the questions above, please state your reasons in the box below. I am hoping that the upcoming course will be a step in the right direction. Unfortunately this has been postponed until next year.'

Respond to the 5 questions by selecting **‘Strongly Agree’**, **‘Agree’**, **‘Disagree’** or **‘Strongly Disagree’** from the dropdown options under **‘End of Year Review’**.

You can provide feedback in the **two free text fields** and finally an **opportunity to say** why you answered ‘Disagree’ or ‘Strongly Disagree’ to any of the above 5 questions.

 **Please Note:** When you provide feedback on why you answered ‘Disagree’ and ‘Strongly Disagree’ to any of the 5 questions above, please reference the question number 1 to 5 as part of your answer.

ePMDS Employee How to Guide

Step 7: Providing End of Year Self-Assessment Feedback

The last section in the ePMDS End of Year Review Form is **your self-assessment**.

Complete this **text box** with a summary of your performance to date.

End-Year Review

Jobholder's self-assessment

I achieved all Goals despite time delays resulting from the system being revised

Manager's assessment

Endyear evaluation

Please Note: The self-assessment acts as **a starting point for the discussion** you have with your Manager. Before filling in the above section you should **review** the following: **Setting My Goals; Achieving My Goals; Learning and Development Plan; and Mid-Year Review Assessment.**

If progress has not been to the expected standard as a **direct result of factors outside your control** then you should reflect this in your commentary.

Step 8: Submit your ePMDS End of Year Review Form to your Manager

When your ePMDS End of Year Review Form is complete, send this to your Manager by clicking the **'Submit to Manager'** button.

You will return to your Home page and a **message** will appear in **green** advising that your Form has been submitted to your Manager.

Save Draft Submit to Manager

Dear Mr. John Smith (username: jsmith)

John Smith
Organisation: Health & Community Services
Role: Health & Community Services
Manager: John Smith
Email: john.smith@hsc.nhs.uk

My 2014 PMDS

Current Status: Draft your review, complete your review

Currently assigned to: The review is available for completion

My Manager Tools

If you only complete part of your Form, 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**.

Save Draft Submit to Manager

Draft saved on: Wed Jan 22 11:52:07 2014

2014 PMDS : End-Year Review

ePMDS Employee How to Guide



Please Note: Your Manager will review your **ePMDS End of Year Review Form** and have the option to **'Sign off'** your Form or **'Return to Job Holder'** i.e. return your Form to you for revision. If your Form has been returned to you, your **Manager will contact** you to agree changes. You should then **update and resubmit** the Form on ePMDS.

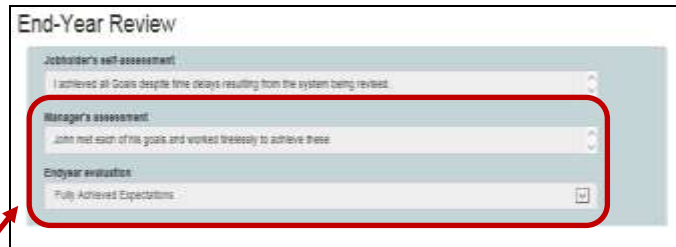
Step 9: Sign off your ePMDS End of Year Review Form & Performance Evaluation

Once your Manager **'signs off'** on your Form, you will then receive an **email notification** advising you to **'Sign off'** on your ePMDS End of Year Review Form.



Login to ePMDS and select the **'Make a change to this form'** button and open your Form.

Check your End of Year Review Form to view your **'Manager's assessment'** and **Evaluation of Performance**.



Please Note: Your Manager will review your **ePMDS End of Year Review Form** and assign a **Performance Evaluation**. Your Manager can choose from the following two Performance Evaluations; **Satisfactory and Unsatisfactory**.

For more information click [HERE](#) to view the ePMDS pages on the PeoplePoint Portal.

ePMDS Employee How to Guide

If you are satisfied with your Form, select **'Sign off'**.



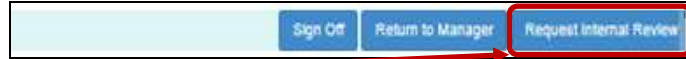
Sign Off Return to Manager Request Internal Review

If you are not satisfied select **'Return to Manager'** and the Form will return to your Manager.



Sign Off Return to Manager Request Internal Review

Alternatively, you have the option to choose **'Request Internal Review'** and request an Internal Review.



Sign Off Return to Manager Request Internal Review



Please Note: Employees and Managers can **'Return'** the ePMDS End of Year Review Form any number of time between them, and the End of Year Review Stage is only complete when Employees finally **'signs off'** the Form.

Employees will be given a deadline to **'Sign off'** on their ePMDS End of Year Review Forms.



Please Note: If you select the **'Request Internal Review'** option, this will request an **Internal Reviewer** to review your ePMDS End of Year Review Form and Performance Evaluation.

4. The Internal Review

The screenshot displays the '2014 PMDS - Internal Review' form. At the top, it identifies the user as 'John Smith' and the organization as 'John Smith'. Below this, there are input fields for 'What is the purpose of this part?' and 'Total number of child support cases'. The 'Goals' section is the main body of the form, containing several sections: 'Objectives', 'What are the outcomes of the work to be reviewed?', 'Target date for completion of the goal', 'Task: Research Activities', 'Competencies', 'Self-Appraisal', and 'Other Self-Appraisal'. Each section contains specific text and input fields for the user to complete. The form is presented in a clean, professional layout with a light blue and white color scheme.

ePMDS Employee How to Guide

How to complete the ePMDS Internal Review Stage

Step by Step Guide

If you are not satisfied with your End of Year Review Form and Performance Evaluation, you have the option to select 'Request Review' at the end of your 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.

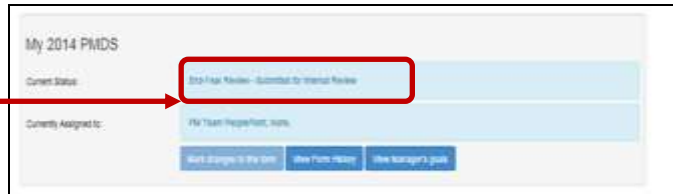
Once completed, PeoplePoint will contact **Remote Workers** by post with the Internal Review outcome.

Step 1: Request an ePMDS Internal Review

If you are **not** satisfied with your End of Year Review Form and Performance Evaluation, you can choose '**Request Internal Review**'.



Your request for an **Internal Review** will be noted on your ePMDS Home Page.



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. Your Internal Reviewer will be your second Supervisor.

Step 2: Receiving an email notification from PeoplePoint

You will receive an **email notification** from PeoplePoint acknowledging your request for an Internal Review.



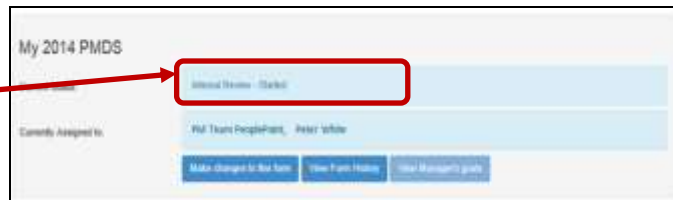
ePMDS Employee How to Guide



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

Step 3: Internal Reviewer Assigned

Once an **Internal Reviewer is assigned**, this will be noted on your ePMDS Home page.

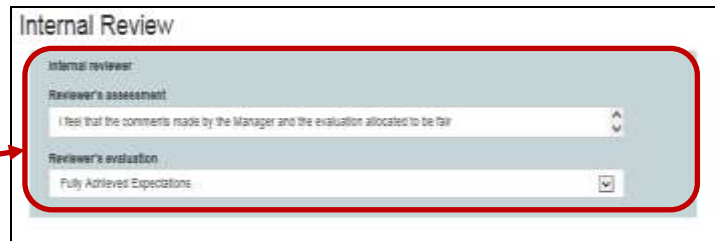


Step 4: Receiving an email notification to view Internal Review Outcome

Once completed, you will receive an **email notification** from your Internal Reviewer directing you to **log on to ePMDS** to view your **Internal Review Form**.



The Internal Reviewer will have inserted a narrative in the **Internal Reviewer comments** section together with a **Performance Evaluation** which may be the same or an alternate to the Manager's decision.



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 you may be due.

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