

# Guide to the ePAR Close-Out

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*\*ePAR Close-Outs must be done using Internet Explorer*

## Why do I need to close-out an ePAR?

The ePAR Close-Out is used to finalize an ePAR when an ePAR is done in error, a Ratee's title changes, a Ratee's supervisor changes, a Ratee's department changes, or a Ratee leaves/separates from the university. The ePAR should be closed-out to record any changes in the system.

## Who closes out an ePAR?

The Rater has responsibility for closing-out the ePAR for the Ratee. The Ratee and Reviewer cannot initiate a Close-Out.

## Which ePAR close-out option should I select?

When closing-out an ePAR, the Rater will have five options to select from the drop-down menu.

Close the Review	
Reason	
<div style="border: 1px solid black; padding: 2px;">Please Select Agency Change Title Change Supervisor Change Separation Invalid ePAR</div>	
Metrics	Final Score
Goal: accomplish most major goals; original objectives were not achieved.	<input type="text"/>
Weight: 2: Achieved some, but not all major goals; some objectives were achieved.	

You should select:

- **Title Change** when a
  - Ratee's state title changes, but the Rater remains the same
  - Ratee's state title changes and Ratee moves to a new department
  - Ratee's title changes and he/she moves to a non-state civil service position
- **Supervisor Change** when a
  - Ratee's supervisor changes and he/she is assigned a new Rater
  - Ratee's state title remains the same, but Ratee moves to a new department
- **Separation** when a
  - Ratee leaves the university and no longer works for Rowan. This includes termination, resignation, and retirement
- **Invalid ePAR** when an
  - ePAR is created in error such that the Ratee was assigned to the wrong Rater
  - Initial ePAR (Job Expectations) has not been fully completed, but the employee has left the university
  - \*\*\*The Invalid ePAR Close-Out deletes the ePAR record from the system

- **Agency Change** when a
  - Ratee leaves Rowan and takes employment with another state agency. \*\*\*It is very unlikely that this option will be selected.

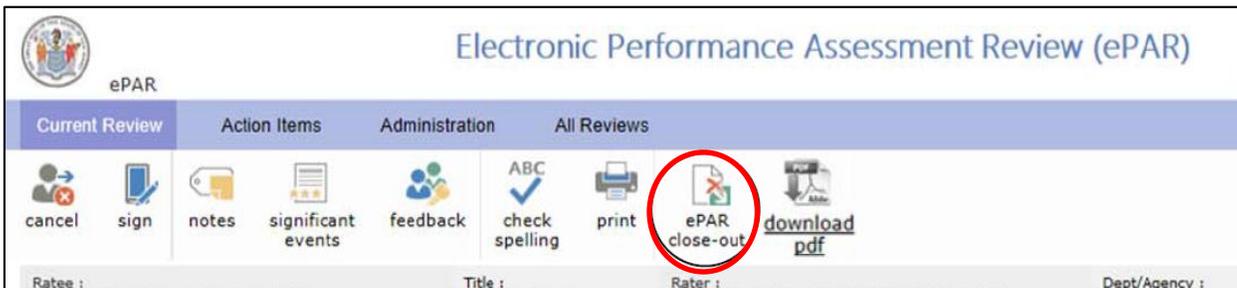
## When do I close the ePAR out?

The Rater should complete an ePAR Close-Out as soon as he/she is aware that one of the above changes will take place. The Title Change, Supervisor Change, Separation, and Agency Change Close-Outs all require Ratee, Rater, and Reviewer signatures, so they should be completed with the intention of gaining the appropriate signatures before the Ratee switches positions and/or supervisors, or leaves the university. If the ePAR cannot be completed until after the change has taken place, the Rater should still follow the steps to complete the Close-Out.

## How do I close the ePAR out?

*\*ePAR Close-Outs must be completed using Internet Explorer*

1. To begin an ePAR Close-Out, the Rater should open the current ePAR for the Ratee by clicking on the Ratee's name under the My Rates section of the ePAR Dashboard (Home Screen).
2. Once the Ratee's ePAR is open, click on the ePAR Close-Out button.



3. The screen will then update to show the ePAR Close-Out form.

 A screenshot of the ePAR Close-Out form. The form has a header with four tabs: "Current Review", "Action Items", "Administration", and "All Reviews". Under "Current Review", there are four icons: "compute rating", "confirm", "cancel", and "check spelling". Below the icons is a section titled "Close the Review". Under this section, there is a "Reason" label and a dropdown menu with "Please Select" as the selected option. At the bottom of the form, there are three columns: "Job Achievement Factors", "Factor Score Metrics", and "Final Score".

4. Click the arrow in the drop-down "Reason" box and select the appropriate Close-Out Reason from the list.

The screenshot shows the 'Close the Review' form. At the top, there are navigation tabs: 'Current Review', 'Action Items', 'Administration', and 'All Reviews'. Below these are icons for 'compute rating', 'confirm', 'cancel', and 'check spelling'. The 'Reason' dropdown menu is currently set to 'Please Select', and a red circle highlights the downward arrow on the right side of the dropdown box.

The screenshot shows the 'Close the Review' form with the 'Reason' dropdown menu open. The dropdown list contains the following options: 'Please Select', 'Agency Change', 'Title Change', 'Supervisor Change', 'Separation', and 'Invalid ePAR'. The 'Please Select' option is currently highlighted. Below the dropdown, the 'Job Achievement Factors' and 'Factor Score Metrics' sections are visible, with a 'Final Score' column on the right.

5. Complete the ePAR Close-Out form

- a. When Supervisor Change, Title Change, Agency Change or Separation is selected, you should complete the final rating by entering a rating for each factor

The screenshot shows the 'Close the Review' form with 'Title Change' selected in the 'Reason' dropdown. The 'Job Achievement Factors' and 'Factor Score Metrics' sections are populated. The 'Final Score' column shows a rating of '2' for both factors.

Job Achievement Factors	Factor Score Metrics	Final Score
Goal Achievement: Overall extent to which employee accomplishes established ratee goals.	1: Failed to accomplish most major goals; original objectives were not entirely achieved. 2: Achieved or exceeded major goals. 3: Significantly exceeded original goals and objectives.	2

Once you complete the Ratings, go back to the top of the page and click Compute Rating.

The screenshot shows the 'Close the Review' form with the 'compute rating' button circled in red. The 'Reason' dropdown is still set to 'Title Change'. The 'Job Achievement Factors' and 'Factor Score Metrics' sections are populated, and the 'Final Score' column shows a rating of '2' for both factors.

Job Achievement Factors	Factor Score Metrics	Final Score
Goal Achievement: Overall extent to which employee accomplishes established ratee goals.	1: Failed to accomplish most major goals; original objectives were not entirely achieved. 2: Achieved or exceeded major goals. 3: Significantly exceeded original goals and objectives.	2
Quality of Work: Overall extent to which employee thoroughly and accurately meets the quality criteria.	1: Failed to achieve most or all essential quality criteria. 2: Achieved or occasionally exceeded all essential quality criteria. 3: Significantly exceeded essential quality criteria.	2

Then scroll down to the bottom of the page to complete the Remarks section. Remarks are required in an ePAR close-out.

		<b>Final Evaluation</b>
<b>Grand Total Points</b>		29
		<b>Final Evaluation Rating</b>
<b>Overall</b>		2
<b>Conversion To Overall Rating</b>		
1-Unsatisfactory (14-22)	2-Successful (23-33)	3-Exceptional (34-42)
Remarks		
You must enter remarks! They should provide reasoning for the rating as well as the reason the ePAR is being closed-out.		

Click Confirm after the remarks are entered.

compute rating
**confirm**
cancel
ABC  
check spelling

**Close the Review**

Reason

Job Achievement Factors	Factor Score Metrics	Final Score
Goal Achievement: Overall extent to which employee accomplishes established ratee goals.	1: Failed to accomplish most major goals; original objectives were not entirely achieved.  2: Achieved or exceeded major goals.  3: Significantly exceeded original goals and objectives.	<input type="text" value="2"/>

- b. When Invalid ePAR is selected you should complete the Remarks section to state why the ePAR is invalid. A Rating does not need to be completed.

**Close the Review**

Reason

Remarks  

>Remarks are entered here<

Click Confirm after the remarks are entered.

Job Achievement Factors	Factor Score Metrics	Final Score
Goal Achievement: Overall extent to which employee accomplishes established ratee goals.	1: Failed to accomplish most major goals; original objectives were not entirely achieved. 2: Achieved or exceeded major goals. 3: Significantly exceeded original goals and objectives.	2

6. Once the Close-Out form is confirmed, the ePAR will be sent for signatures. The system will send an email reminder to all parties for review and signature.

Electronic Performance Assessment Review (ePAR)

CIVIL SERVICE COMMISSION \*

Ratee : PARKS, LAMONTE [000373740] Title : HMN RSRCE CNSLT 1 Rater : Participant4, Training [NS0000087] Dept/Agency : CS/CSA ModelID : CSAX0701P-E2016 Year : 2016

Job Expectations Interim Review Final Review

Close-out : Ratee Signature

Ratee: PARKS, LAMONTE [000373740] Date: Friday, February 5, 2016

I agree with the Final Rating  I disagree with the Final Rating  
 I agree with the Final Justification  I disagree with the Final Justification

Ratee Comments :

Reviewer Signature

**Close-out : Rater Signature**

Final Review

✓ Final Ratings

✓ Final Justification

Face to Face Meeting

✓ Ratee Signature

✓ Rater Signature

⇒ Reviewer Signature

Rater: Participant4, Training [NS0000087] Date: Thursday, February 4, 2016

Rater Comments :

My signature through this checkbox indicates that the Ratee's positions have been noted

(If ratee signature missing) I certify Ratee refuses signature

**Close-out : Reviewer Signature**

Reviewer: LOPEZ, CLAUDIA M [000361799] Date: Friday, February 5, 2016

Reviewer Comments :

(If Rater signature missing) I certify as Rater

\*Raters can certify that the Ratee refuses signature if the Ratee has already left the university before the Close-Out is completed

- Once all signatures are received, the Rater's Dashboard updates. Progress changes to "Review Close". Status will update to "Complete." The employee will remain on the Dashboard until the next rating cycle.

At the end of the invalid ePAR (where signatures are not required), the Rater's Dashboard updates. Progress changes back to "Goal Setting" with a status of "Not Initiated".

After the Close-Out is completed the Rater should email HR to have the Ratee removed from his/her Ratee list (if applicable).