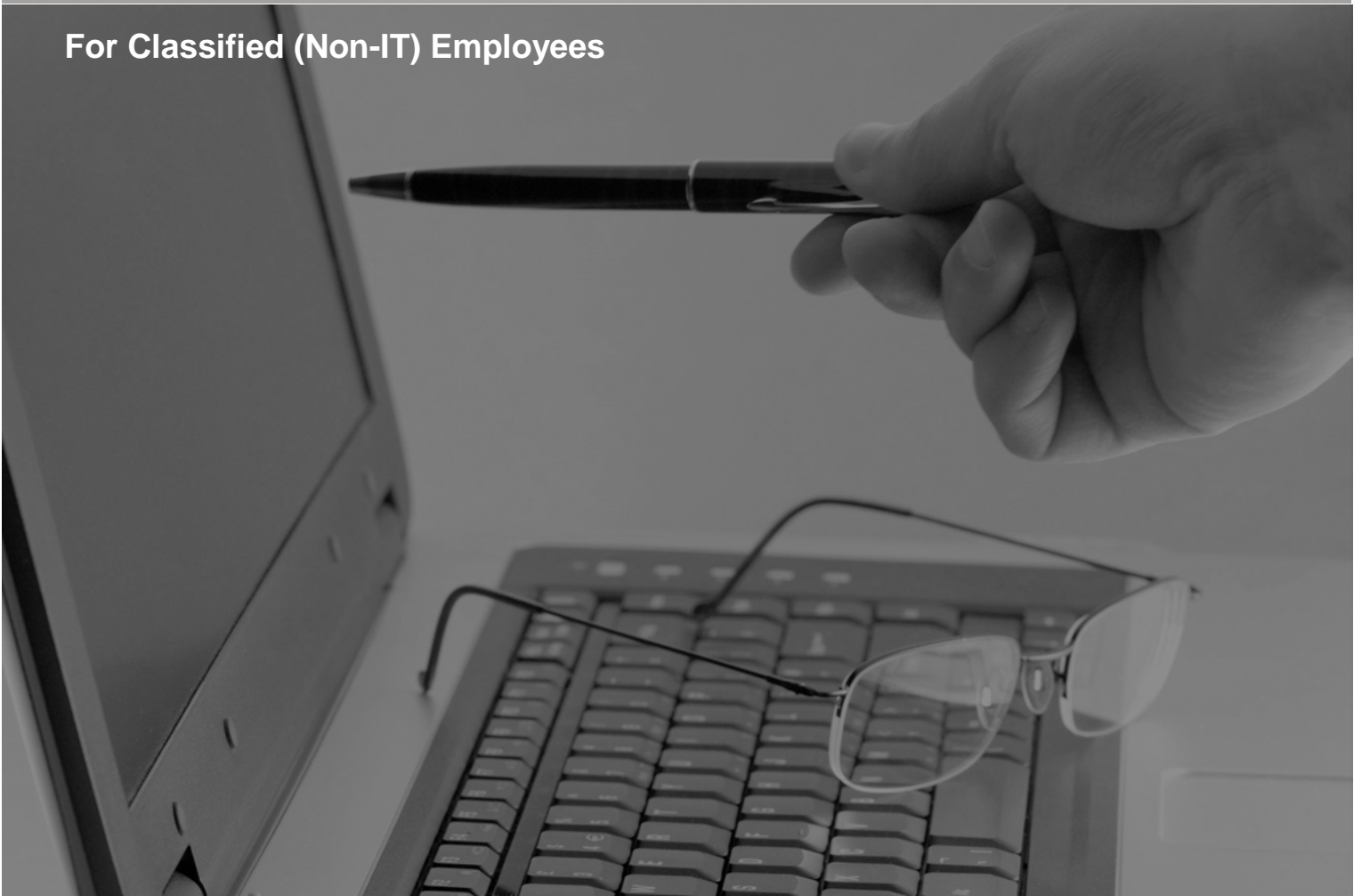


EvalS Performance Evaluation Management System

HR REVIEWER USER'S GUIDE

For Classified (Non-IT) Employees



HR Reviewer Users Guide to EvalS – DRAFT

Review

Purpose: To assist Business Center Human Resource reviewers of classified employee's performance evaluations in the EvalS system.

Overview –

Once the supervisor has consolidated the results, completed the appraisal section, and determined a performance rating for an employee, a designated member of the Business Center HR department will review the evaluation based on established criteria. The reviewer may make suggestions to the supervisor to modify the performance evaluation.

When –

The HR reviewer will receive an email message that there is an **Appraisal awaiting a review**. Or you may also check the Notifications/My Administrative Actions section of your EvalS Home Page. Be sure you have selected the Reviewer Role. It is expected that the HR Review Process should be completed within 15 days, or within 15 days of the end of the evaluation period whichever comes first.

EvalS HR Reviewer Users Guide

When you have evaluations requiring review you will receive an email letting you know. Click on the link provided in the email message. This will bring you to the log on for your My OSU home page. Use your ONID user name and password and you will see your My OSU home page. Click on the **Employee Tab**. On the right hand side of the page you will see the EvalS section. Look for the tab titled ROLES. **Click on ROLES, and select Reviewer**

Look at the EvalS section labeled **Notifications**

The Notifications Section – Will have messages in the **My Administrative Actions** area about upcoming tasks (i.e. You have 1 appraisals to review).

EvalS

EvalS Home Settings Roles

Reviewer view. Select a different role above for more options.

⚠ The new EvalS system is now live for classified employees with performance evaluations due Dec 1, 2011 and after. You may use EvalS now, or continue using the paper process until Jan 1, 2012. Training and additional information will be available soon.

▲ Notifications

My Evaluation Actions

No actions required

My Administrative Actions

- You have 1 appraisal(s) to review

▲ Appraisals Pending Reviews

Name	Type	Review Period	Status
Lu, pass2	Trial	12/01/12 - 12/31/13	Review due

[Full List](#)

▲ Search..

Enter the employee 9-digit osu id

▲ Helpful Links

- [EvalS Help Documents](#)

If it indicates that evaluations need to be reviewed, **CLICK on that message** and EvalS will take you to an **Appraisals Pending Review** screen. This page will display the list of appraisals that are pending your review. By clicking on **Review Due**, EvalS will open the evaluation for your review.

EvalS

EvalS Home

Appraisals Pending Reviews

Search

Review Period	Type	Employee	Job Title	Position No	Timesheet Org code Description	Status
12/01/12 - 12/31/13	Trial	Lu, pass2	Software Architect	1234	Media Services	Review due

If questions or concerns arise regarding the content of a performance evaluation, it is recommended that the reviewer contact the supervisor to have a conversation and determine if appropriate changes are necessary.

When you have completed your review you can enter feedback in the **HR Comments Text Box**.

Refer to the supplemental materials available at the Evals web site to assist in your review.

<http://oregonstate.edu/admin/hr/performance-evaluation/>

RATINGS

The “No Rating” option in EvalS is reserved non-IT classified employees and for particularly unusual situations and supervisors should consult with Human Resources prior to making this selection. Primarily, the “No Rating” selection is utilized when there has been a significant disruption in the evaluation cycle. There may be a change in reporting structure, a substantial in job responsibilities, or the performance evaluation process may have broken down and needs to be re-established.

An evaluation for an IT Classified employee will not have a “No Rating” option available

IT SALARY ADMINISTRATION

The Salary Recommendation Section is the place in the evaluation the supervisor indicates the appropriate base pay recommendation that corresponds to the IT classified employee’s performance rating.

Select a rating

☐ 1. Makes outstanding contribution in critical areas while meeting all major requirements of the position.

☐ 2. Performs requirements of the position in a satisfactory manner.

☒ 3. Does not meet performance requirements of the position in major or critical areas.

Salary Recommendation

Current Salary	Control Point Value	Control Point (Low)	Control Point (High)	Control Point	Recommended Increase (%)	Salary After Increase	Salary Eligibility Date
\$3,500.00	\$3,000.00	\$2,000.00	\$4,000.00	Above control point	0	\$3,500.00	04/01

Save Draft

Submit Appraisal

Descriptions

There are three potential scenarios that a supervisor may encounter:

Performance Rating = 1 Consistently Exceeds Standards

If the supervisor enters a performance rating of “1”, EvalS will present a base pay increase percentage range available for that employee. The range will be based on whether the employee’s current pay is above or below the control point. The supervisor may enter a percentage within that range. EvalS will automatically reject a recommendation outside of that range. EvalS will also automatically reject an increase recommendation that would result in a salary above the upper limit of the pay range specified in the collective bargaining agreement.

Performance Rating = 2 Meets Standards

If the supervisor enters a performance rating of “2”, EvalS will automatically populate the base pay percent increase specified in the collective bargaining agreement contingent upon the location of the employee’s current salary relative to the control point.

Performance Rating = 3 Does Not Fully Meet Standards

If the supervisor enters a performance rating of “3”, EvalS will automatically set the base pay percent increase recommendation to “0.0” percent.

The HR Reviewer should double check that the entries in this area are correct and that the recommendation does not exceed the appropriate percentage or the upper and lower limits of the salary available for that particular employee.

HR COMMENTS

Note: The HR Comments text box is limited to 3,000 characters.

Note: Only the supervisor will have visibility to your reviewer comments.

The screenshot displays the EvalS performance review interface. It features a 'Technical Skills' section with a description and three sub-sections: 'Goals', 'Employee Results', and 'Supervisor Results', each with a text input area. Below this is the 'Appraisal' section, which includes an 'Evaluation' text input area and a 'Select a rating' section with four radio button options. At the bottom is the 'HR Comments' section with a large text input area. The form concludes with 'Save Draft' and 'Submit Review' buttons.

Technical Skills

Possess and demonstrate technical, general or other specific knowledge and skills required to perform job duties.

Goals

This is where you would put in your goals.

Employee Results

Possess and demonstrate technical, general or other specific knowledge and skills required to perform job duties.

Supervisor Results

This is where the supervisor enters his/her results.

Appraisal

Evaluation

This is where the supervisor enters his/her results.

Select a rating

- ☐ Makes outstanding contribution in critical areas while meeting all major requirements of the position.
- ☐ Performs requirements of the position in a satisfactory manner.
- ☐ Fails to meet performance requirements of the position in major or critical areas.
- ☐ No rating

HR Comments

This is where the HR reviewer would type in the comments for the supervisor.

Save Draft **Submit Review**

Once any comments are entered you may select

SAVE DRAFT

Or

SUBMIT REVIEW

Submitting the review will trigger an email to the supervisor that your review is complete and the evaluation is available to be released to the employee. The supervisor has the option to make any appropriate edits in the supervisor results, appraisal summary or performance rating prior to releasing the evaluation to the employee.

NOTE: If more extensive dialogue with the supervisor is warranted prior to the evaluation being released to the employee **DO NOT SUBMIT REVIEW** until all issues have been resolved.

REBUTTALS

Overview –

At the same time an employee electronically “signs” the evaluation in EvalS; they have the opportunity to submit a written rebuttal in the EvalS system. If they wish for the rebuttal to be in the EvalS system, they must submit the rebuttal at the same time they electronically sign the evaluation. They cannot return to EvalS later and submit a rebuttal in the system.

NOTE: If a rebuttal is not entered at the point of employee signature, a written rebuttal may be subsequently submitted to the Business Center Human Resources Department within 60 days. It will then become a part of the employee’s personnel file.

If an employee decides to include a rebuttal at the time they sign the evaluation, EvalS will alert the HR Reviewer with an email indicating that a rebuttal has been submitted. This is simply for the HR Reviewer’s information. No action is required. However, you will have the ability to view the rebuttal if you choose to.

The supervisor will have received a similar message and will need to read the rebuttal and indicate that they have done so in EvalS.

NOTE: THERE IS NO NEED TO SCAN IN A COPY OF THE COMPLETED EVALUATION INTO NOLIJ. THAT WILL OCCUR AUTOMATICALLY

CLOSING AN EVALUATION

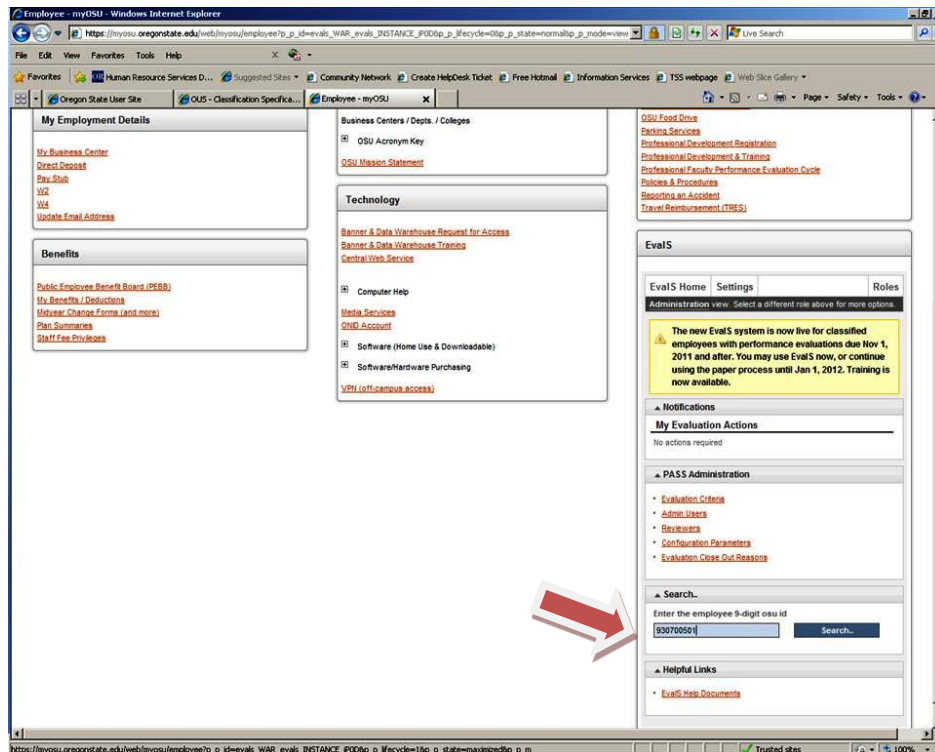
Under certain circumstances (see below), either the HR Reviewer, or one of the EvalS Administrators may need to CLOSE an evaluation in EvalS. This procedure will “reset” EvalS to ensure that due dates and messages will be appropriate.

Reasons for Closing an Evaluation:

- Employee refuses to sign appraisal (print hard copy, have 2 managers sign, and scan into NOLIJ)
- Job termination (left position, promoted, retired, voluntary or involuntary)
- Layoff
- Performance Evaluation completed on paper for IT classified employees (only through December 2013)
- Position on long-term leave (not summer job on leave)

How to Close a performance evaluation record in Evals

1. Log into Evals
2. Enter the 9-digit Employee ID of the record you wish to close:



3. Open the record you wish to close:

The screenshot shows a web browser window displaying the myOSU EvalS page. The page has a navigation bar with links like 'Welcome', 'Employee', 'Admin Tools', 'Supervisor', 'Campus Life', and 'OSU Libraries'. Below the navigation bar, there is a search bar and a table of evaluation records. The table has columns for 'Review Period', 'Type', 'Employee', 'Job Title', 'Position No', 'Timesheet Org code Description', and 'Status'. The first row of the table shows a review period of '11/01/11 - 10/31/12', an annual evaluation for Corbus, Misty, a Histotechnologist at position C33407, and a status of 'Goals Approval Overdue'. A red arrow points to this status. The second row shows a review period of '11/01/10 - 10/31/11', an annual evaluation for Corbus, Misty, a Histotechnologist at position C33407, and a status of 'Appraisal Overdue'.

Review Period	Type	Employee	Job Title	Position No	Timesheet Org code Description	Status
11/01/11 - 10/31/12	Annual	Corbus, Misty	Histotechnologist	C33407	VDL - Vet Diagnostic Lab	Goals Approval Overdue
11/01/10 - 10/31/11	Annual	Corbus, Misty	Histotechnologist	C33407	VDL - Vet Diagnostic Lab	Appraisal Overdue

4. Click on Close Out Evaluation:

Employee - myOSU - Windows Internet Explorer

https://myos.oregonstate.edu/web/myos/employee/p_p_id=evals_WAR_evals_INSTANCE_PODdp_p_ifecycle=11dp_p_state=maximizedp_p_mode=...

File Edit View Favorites Tools Help

Human Resource Services D... Suggested Sites Community Network Create HelpDesk Ticket Free Hotline Information Services TSS webpage Web Slice Gallery

Oregon State User Site OUS - Classification Specifica... Employee - myOSU

Welcome Tracy Yee Home ONID Email ? Help Sign Out

myOSU My Personal Pages

Welcome Employee Admin Tools Supervisor Campus Life OSU Libraries

EvalS

EvalS Home

Please create the text for Goals, Results, and Appraisal in a Word document and save it. Then, copy and paste into the appropriate boxes in EvalS. EvalS does not automatically save drafts yet, and will eventually time out, and this will give you a back-up so your data is not lost.

Classified Performance Evaluation: Goals appr

Download as PDF Close Out Evaluation

Evaluation Information

Employee: Corbus, Misty	Supervisor: Fischer, Kay	Job Title: Histotechnologist	Position No: C33407	Job Start Date: 10/30/00
ID: 930700501	Evaluation Type: Annual	Review Period: 11/01/11 - 10/31/12	Status: Goals approval Overdue	Rating:

Reliability/Dependability

Consistently demonstrate accountability for actions; can be counted on to follow through and achieve results

Goals

I will continue to share knowledge of problems so that, as a team, we may resolve them effectively.

I will endeavor to use my time wisely to complete tasks before deadlines.

Teamwork

Cooperative effort to achieve common goals; ability to work well with others

Goals

My goal is to continue to work well within the efficient team that we have developed in the histotechnology laboratory.

We continually strive to improve the quality and speed of our work to deliver a good value for our customers (pathologists and researchers).

5. Select the appropriate reason for closing:

Employee - myOSU - Windows Internet Explorer

https://myos.oregonstate.edu/web/myos/employee/p_p_id=evals_WAR_evals_INSTANCE_PODdp_p_ifecycle=11dp_p_state=maximizedp_p_mode=...

File Edit View Favorites Tools Help

Human Resource Services D... Suggested Sites Community Network Create HelpDesk Ticket Free Hotline Information Services TSS webpage Web Slice Gallery

Oregon State User Site OUS - Classification Specifica... Employee - myOSU

Welcome Tracy Yee Home ONID Email ? Help Sign Out

myOSU My Personal Pages

Welcome Employee Admin Tools Supervisor Campus Life OSU Libraries

EvalS

EvalS Home

Close Out Evaluation

Close Out Evaluation

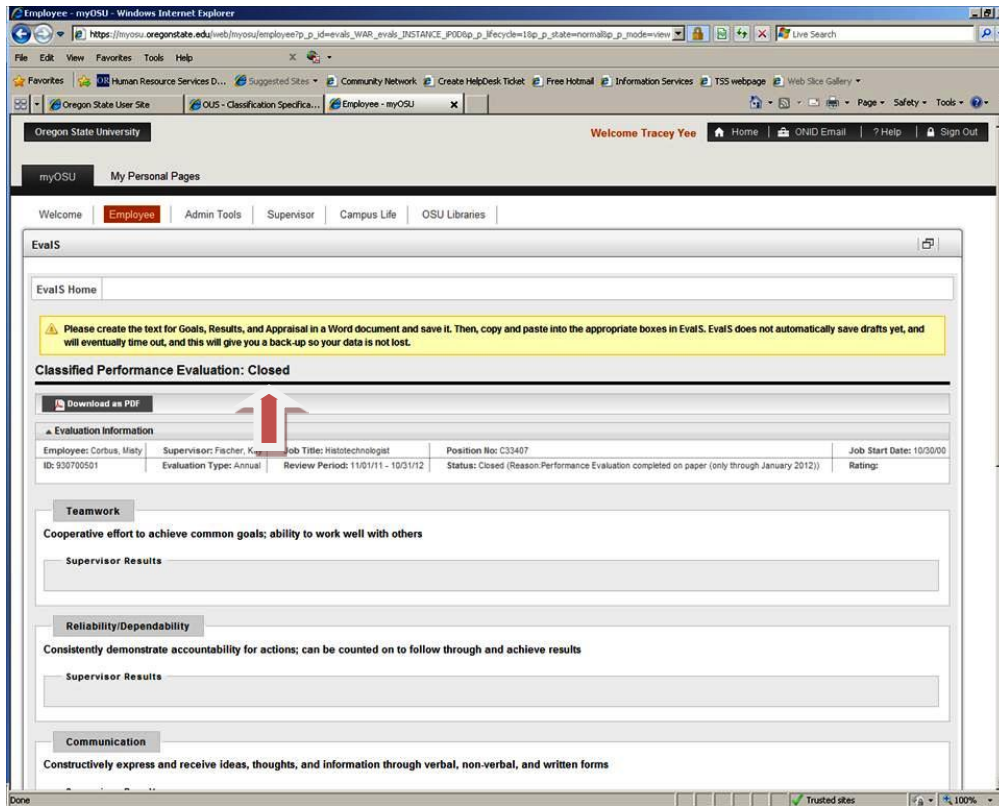
This action cannot be undone. Are you sure you want to close out the evaluation for employee Corbus, Misty for the review period 11/01/11 - 10/31/12 ?

Select a close out reason

- ☐ Employee refuses to sign appraisal (print hard copy, have 2 managers sign, and scan into NOLU)
- ☐ Job Termination (promotion, promoted; retired; voluntary or involuntary)
- ☐ Layoff
- ☒ Performance Evaluation completed on paper (only through January 2012)
- ☐ Position on long-term leave (not summer job on leave)

Close Cancel

6. Click “Close”



FINDING AN EVALUATION

From the EvalS section of the OSU Portal – in the HR Reviewer Role, find the section labeled **Search**

Enter the employee 9 digit OSU id

