Overview

for Professional Faculty Employees

EvalS Electronic Performance Evaluation System
The myOSU Portal (http://myosu.oregonstate.edu)

When logging into the myOSU Portal, you will generally start out at the Welcome page.

The boxes you see here are called “Portlets.” A portlet is simply an application within the portal.
The EvalS Portlet

Clicking on Employee tab brings you to the employee screen, where you will find the EvalS Portlet

You’ll see the EvalS portlet here in this area
Creating the Evaluation

My Evaluation Actions
No actions required

My Administrative Actions

- Monroe-EVALS5, James Test5 Goals Due for 03/01/14 - 08/31/14 in 127 day(s)
- Adams-EVALS, John Test2 Evaluation Release Due in 321 day(s)
- Tee HR-HRIS, Sheena Goals Due for 06/01/14 - 05/31/15 in 35 day(s)

Create Professional Faculty Evaluations
Choosing the Review Period

Professional Faculty Evaluation Creation

Notification

Professional faculty evaluations are to be completed annually. As supervisor, use this page to initiate the performance evaluation for your professional faculty employees in EvalS. You do so by choosing from the choices available, and clicking on the "Create Evaluation" button.

EvalS will create the evaluation records annually based on the performance review cycle you choose. Please choose a performance review cycle that best mirrors the planning and activity calendar of your business. Use one of the following available choices:

- Fiscal Year (7/1 - 6/30) Use the actual year the review period will begin
- Academic Year (9/1 - 8/31) Use the actual year the review period will begin

Professional Faculty You Supervise without Active Evaluations

<table>
<thead>
<tr>
<th>Name</th>
<th>Position Number</th>
<th>Job Title</th>
<th>Supervising Position Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams-EVALS, John Test2</td>
<td>C30134</td>
<td>Assoc Dir-Comm &amp; Corp Dev</td>
<td>C10210</td>
</tr>
</tbody>
</table>

Choose Start Month/Year for evaluation cycle

Cycle

Select a cycle

Year

Select a cycle

Create Evaluations
Start Here for Unit Specific Information

START HERE: Read Goal Setting Hints

Professional Faculty Performance Evaluation: Goals Due

Download as PDF

View Position Description

Evaluation Information

Employee: Adams-EVALS, John Test2
Supervisor: Tyler-EVALS, John Test9
Job Title: Advisor
Evaluation Type: Annual
Review Period: 05/22/14 - 05/21/15
Status: Goals Due
Rating:

Evaluation Details

Position No: C30134
Job Start Date: 06/23/10
Professional Faculty EvalS Resource Page Contents

- Links to Resources and User Guides
- Setting Goals – Additional Goal Requirements by individual units/colleges
- Performance Criteria Definitions
- Performance Rating Descriptions
- Professional Faculty EvalS Timeline
- FAQ’s
EvalS Process Steps for Professional Faculty

1. Establish Goals
2. Record Results
3. Writing an Overall Appraisal and Rate Performance
4. Release for Employee Review
5. Final Edits, Electronic Signatures, Optional Comments
Step 1: Establishing Goals

1. There is a 60-day window for the employee and supervisor to write and approve goals for the year. You will be notified by automated e-mail messages.

2. This will begin 30 days prior to the end of the evaluation year, and end 30 days into the new evaluation year.

3. Allows for goals to be written in conjunction with the prior year evaluation.

4. This is an excellent occasion to review the Position Description and utilize as a basis for new goals.
Professional Faculty Performance Categories

• Leadership
• Management
• Collegiality / Teamwork
• Communication
• Social Responsibility / Service / Outreach
• Professional / Technical Competency
• Business Drivers/Results
Goals Screen Shcet

Evaluation Details

Goals to be approved:

Goal # 1

- BUSINESS DRIVERS/RESULTS
- COLLEGIALLY/TEAMWORK
- COMMUNICATION
- LEADERSHIP
- MANAGEMENT
- PROFESSIONAL/TECHNICAL COMPETENCY
- SOCIAL RESPONSIBILITY/SERVICE/OUTREACH
Establishing Goals Related to the Employee’s Position

- At least one goal must be established for the employee.
- If more space for additional goals is needed, click the “Add Goal” button.
- Employee begins by entering goals – Save Draft or Submit.
- Supervisor reviews – may approve, edit, or return.
- Supervisor ultimately approves.
- Each goal must be associated to one or more performance criteria at the bottom of the goal text box.
Supervisor Review of Goals

Goal 1

- Business Drivers/Results
- Collegiality/Teamwork
- Communication
- Leadership
- Management
- Professional/Technical Competency
- Social Responsibility/Service/Outreach

Supervisor's goals comments (optional)

Save Draft  Require Goals Modification  Approve Goals
Reactivating Goals
Step 2 Documenting Results

• Two distinct “boxes” exist to document the results of goals – one for the employee and one for the supervisor.

• You can track results directly in EvalS during the course of the year.

• Notification will be given 60 days prior to the evaluation due date to begin finalizing results relative to established goals.

• You may “save draft” throughout the year to document achievements. Results may not be SUBMITTED until the end of the 12 month review period.
Results Screenshot

Goal #1

XYZ

- BUSINESS DRIVERS/RESULTS
- COLLEGIALITY / TEAMWORK
- COMMUNICATION
- LEADERSHIP
- MANAGEMENT
- PROFESSIONAL / TECHNICAL COMPETENCY
- SOCIAL RESPONSIBILITY / SERVICE / OUTREACH

Employee Results

Finished

Supervisor Results
Step 3 Finalizing Results, the Appraisal Section, and Rating

Summarize overall accomplishment of goals, build on the results and craft an overall summary of the employee’s performance
Overall Performance Rating

- Exceptional Performance – Consistently operates well above expectations.
- Strong Performance – Fully meets and often exceeds expectations of the position.
- Satisfactory – Fully meets the expectations of the position.
- Needs Improvement – Occasionally does not meet expectations or needs significant improvement in critical areas.
- Does Not Meet Expectations – Consistently does not meet expectations in key elements of the position.
- No basis for evaluation / Not Rated (next level manager will be notified).
Step 4 Releasing the Evaluation for Employee Review

**Appraisal Summary**

**Overall Evaluation**

* a great year overall

**Select a rating**

- □ Exceptional Performance - Consistently operates well above expectations
- □ Strong Performance - Fully meets and often exceeds expectations of the position
- □ Satisfactory Performance - Fully meets the expectations for the position
- □ Needs Improvement - Occasionally does not meet expectations or needs significant improvement in critical areas
- □ Does Not Meet Expectations - Consistently does not meet expectations in multiple key elements of the position
- □ No basis for evaluation / Not rated

[Save Draft] [Submit Appraisal]
Step 4 Releasing the Evaluation for Employee Review

After the evaluation has been released, the employee has 15 days to review and make comments. If no action taken, evaluation will automatically go to a Signature Due status.

This is the ideal period for the supervisor and the employee to meet and review the contents of the evaluation.
Step 5 Release for Signature

Select a rating

- Exceptional Performance - Consistently operates well above expectations
- Strong Performance - Fully meets and often exceeds expectations of the position
- Satisfactory Performance - Fully meets the expectations for the position
- Needs Improvement - Occasionally does not meet expectations or needs significant improvement in critical areas
- Does Not Meet Expectations - Consistently does not meet expectations in multiple key elements of the position
- No basis for evaluation / Not rated

Supervisor Signature

- I have reviewed the contents of this evaluation with the employee and approve its completion and release to the employee for signature.

Employee Review

Save Draft  Sign and Release to Employee
Employee Signature and Optional Comments

- Adviser Signature Due for 05/22/14 - 05/21/15 in 349 days

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Review Period</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor</td>
<td>05/22/14 - 05/21/15</td>
<td>Signature Due</td>
</tr>
</tbody>
</table>

- Check the box to indicate that you have read the evaluation, and reviewed the evaluation with your supervisor. Signing this evaluation does not necessarily mean that you agree with this evaluation.

- I want to submit an optional response

- Save Draft

- Sign Evaluation
Optional Comments

Signature

- Check the box to indicate that you have read the evaluation, and reviewed the evaluation with your supervisor. Signing this evaluation does not necessarily mean that you agree with this evaluation.

Electronically signed by Adams-EVALS, John Test 01/06/15 2:30 PM

Employee Response

Great year. Next year more challenges

- I acknowledge, I've read the employee response.

I Have Read the Employee Response
Finishing the Process

- A copy of the evaluation should be downloaded and printed.
- Employee should retain a copy, the supervisor should retain a copy, and a copy will automatically be filed in the employee’s personnel file in NOLIJ.
- Note: The evaluation period is a full 12 months. Evals allows an additional 3 months to complete the process.
- Goals for the next evaluation period can begin to be entered 30 days prior to completion of the current evaluation year.
Unique Features of Professional Faculty EvalS

- Tailored performance categories
- Allows for unit specific requirements
- Employee Review process step
- Customized Rating System
- Optional employee comments
- Extended time for completion (15 month review cycle)
Additional Materials and Support

http://hr.oregonstate.edu/evals

Online Training
User Guides
FAQ’s
Process Flow Chart
Calendar / Time Frame
Resource Page – Unit Specific instructions
Performance Criteria Definitions

Questions? Issues? Send an email to: employee.relations@oregonstate.edu