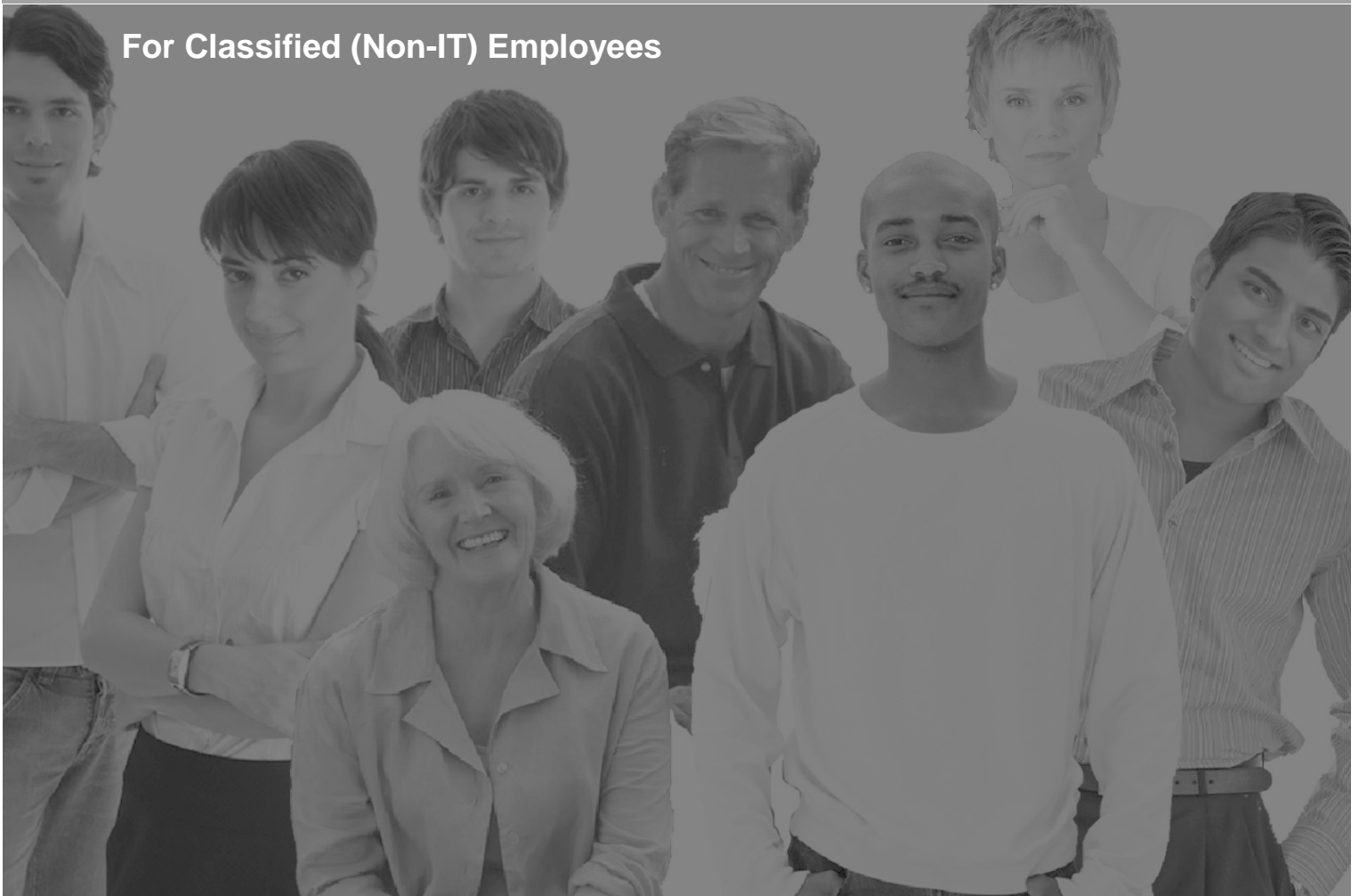


***EvalS*** Performance Evaluation Management System

# EMPLOYEE USER'S GUIDE

For Classified (Non-IT) Employees



# Employee Users Guide to EvalS

**NOTE:** If you do not typically have access to a PC – Arrange a time with your supervisor to gain access and use a PC within your department, or you may choose to use one of the computers available in one of the libraries on campus.

**Helpful Hint:** Having the information you will enter into EvalS already written down on a separate piece of paper will allow entering the information to go more quickly and smoothly.

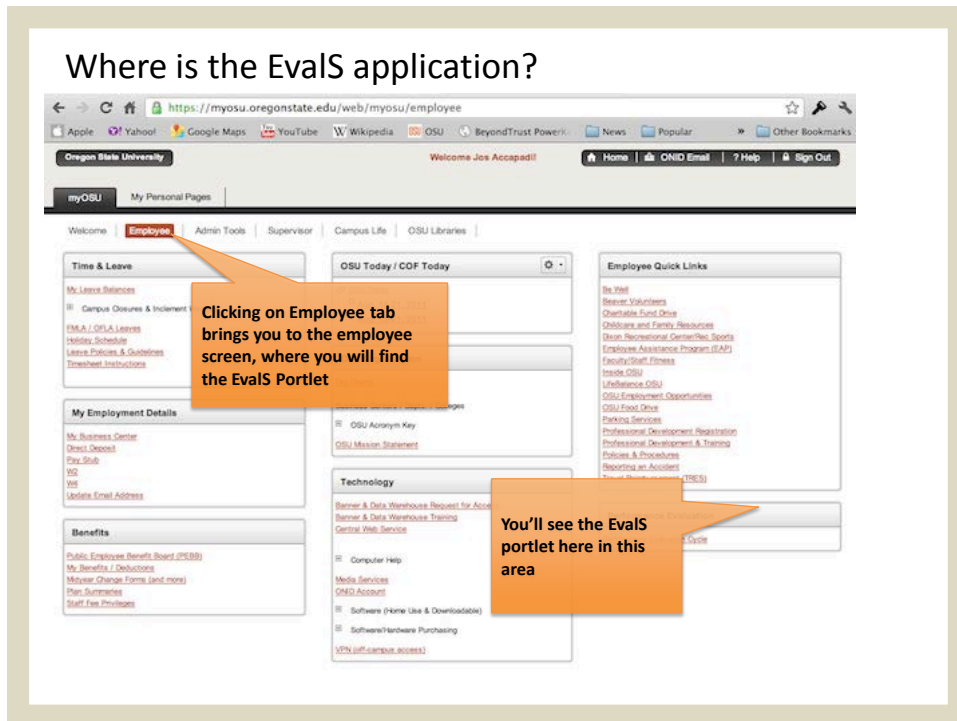
## Logging on to the EvalS System on the computer

Log onto the My OSU Home Page by going to: <https://myosu.oregonstate.edu/web/myosu/employee>

Enter your **ONID User Name** and **ONID password** and then press **ENTER**

You will now be at your My OSU Home Page. Click on the tab “Employee”

On the right hand side of the page you will see the EvalS section.



Check the **Notifications** Section: – This will contain messages about upcoming deadlines and tasks in the **My Evaluation Actions** area. For example, a message that reads your goals are due would appear 30 days prior to evaluation period end.

**Returning to the EvalS beginning page** – If you need to return to the beginning page of EvalS at any time, look for the tab titled, “**HOME**” and click on that tab.

## GOALS

**Purpose:** To assist classified employees to enter goals into the EvalS system.

### Overview –

Well crafted goals provide a clear understanding of what is expected and at what level a person will be held accountable. They build a partnership between employees and their supervisors in documenting the opportunities to meet evolving business needs, as well as meeting personal and/or career development objectives.

The goals section of EvalS document performance and development goals for the upcoming evaluation period.

At least one goal must be entered into the Goals Section of EvalS. For each goal you must select at least one of the evaluation criteria (communication, technical, team building, and reliability/dependability).

### When –

Employees enter goals near the beginning of the performance evaluation period. Goals are due to be entered into EvalS no later than 30 days after the start of the evaluation period.

### How to Enter Goals in EvalS –

You will receive an email message reminding you that your goals are due.

*Subject: Action Required Performance Evaluation Goals are due*

*It is time to enter your goals for your <Position Title> position for the <review period> review period. You will enter goals in the areas of Communication, Teamwork, Technical Skills and Dependability/Reliability. Please complete this task within <30> days.*

*Use the following link to access the EvalS System:*

<https://myosu.oregonstate.edu/web/myosu/employee>

CLICK on the link which will take you to your My OSU Page log on. Use your ONID User Name and Password to arrive at the My OSU Home Page. Click on “Employee”. You will see the EvalS section on the right hand side of the page. In **the Notifications / My Evaluation Actions** you will see a message informing you that your goals are due.

## Goals Setting Stage

When you click on the link, it will take you to the specific section of the evaluation for entering goals.

Notifications Area: You will be notified here when goals are due. Click the link to go to Goals Entry Form.

My Status Area: You can see that goals are due here as well as the current status of your evaluation. Clicking here is the same as clicking the Notifications area link.

Job Title	Review Period	Status
Administrative Program Assist	10/01/10 - 09/30/11	Goals due

- [Performance Evaluation Cycle](#)
- [Performance Evaluation Forms for Professional Faculty](#)
- [PASS User Help](#)
- [Business Centers](#)

Click on the **Goals Due** message

Enter your goals into the **Goals text boxes** and select the relevant **Performance Criteria** (communication, teamwork, technical, and reliability/dependability) for each goal.

Both you and your supervisor may input goals into this section. You may add additional goals by clicking on the **Add Goal** tab. You can also delete a goal at this stage prior to submitting you goals for supervisory approval.

## Entering Goals

The screenshot shows a web interface for entering goals. At the top, there are four performance criteria: **Communication**, **Reliability/Dependability**, **Teamwork**, and **Technical Skills**. Below these is a text input field labeled "Goal # 6". To the right of the field is a "Delete this goal?" link. Below the field are the same four performance criteria. At the bottom, there are two buttons: "Save Draft" and "Submit Goals".

Callouts provide the following information:

- A yellow callout points to the criteria: "The full definition for each performance criteria is revealed by hovering over the title".
- An orange callout points to the "Delete this goal?" link: "If you need to delete a goal click here above the goal text".
- An orange callout points to the "Add Goal" link: "If you need to add additional goals click here".
- A yellow callout points to the "Submit Goals" button: "You have the option to Save a Draft or Submit your goals for approval when you are ready".

A red-bordered box contains the following note:

**NOTE:** Goals are a shared responsibility between Supervisor and Employee. In most cases, employees will enter goals after having discussion with Supervisor. Draft Goals are visible to both the Employee and Supervisor. Supervisor should approve goals only after they have been fully edited and agreed to.

When you have completed entering your goals, go to the bottom of the page and select **Save Draft**. That will allow you to save what you have put in so far, and also to return and edit or add more information.

If you need to edit your goals – Go through the same steps to log on to EvalS and you may edit your goals. Then go to the bottom of the page and select **Save Draft** again.

Once you have completed entering your goals select **SUBMIT GOALS**. **Please be sure you have finished entering your goals into EvalS before selecting SUBMIT GOALS.**

## Goals Submitted for Approval

The screenshot shows a web application interface with the following sections:

- Home Settings**
- Notifications**
  - My Evaluation Actions**: No actions required.
- My Status**

Job Title	Review Period	Status
Administrative Program Assst	10/01/10 - 09/30/11	Goals approval due
- Helpful Links**
  - Performance Evaluation Cycle
  - Performance Evaluation Forms for Professional Faculty
  - EVALS User Help
  - Business Centers

Callout boxes provide the following information:

- Once you submit goals, you will go back to the non-expanded view** (points to the top of the page).
- Notifications Area: You now see that there are no actions required on your part.** (points to the 'My Evaluation Actions' section).
- My Status Area: The current status is Goals approval due, meaning your supervisor has to approve your goals. If you click this link you can view what you submitted** (points to the 'Goals approval due' status in the table).
- Goals approval due indicates your supervisor is reviewing the goals to determine if they should be approved.** (points to the 'Goals approval due' status in the table).

Once they are submitted, your supervisor will review the goals. They may modify them and/or add additional goals. Your supervisor may also select **Goals Require Modification**. In that case, you will receive an email indicating that the goals require modification. You should contact your supervisor promptly to review their concerns and make any appropriate adjustments. There is also a space in EvalS for your supervisor to provide their comments regarding the goals if they require modification. Once the changes have been made you will select **Submit Goals** again. When the goals are finalized, your supervisor will select the option to **APPROVE GOALS**.

If the goals require modification you will receive the following e mail:

*Subject: Action Required: Modification of Performance Evaluation Goals Needed*

*Your supervisor has indicated that additional review and modification of your goals are necessary. If you need further clarification, please contact your supervisor.*

*Use the following link to access the EvalS System:*

<https://myosu.oregonstate.edu/web/myosu/employee>

If the goals have been approved you will receive the following e mail:

*Subject: Notification: Performance Evaluation Goals Approved*

*Your supervisor has approved your goals for your <Position Title> for <review period> review period. You may begin recording results for your goals as you accomplish them throughout the coming year.*

Use the following link to access the EvalS System:

<https://myosu.oregonstate.edu/web/myosu/employee>

## RESULTS

**Purpose:** To assist classified employees to enter results into the EvalS system.

### Overview –

The Employee Results section of EvalS documents the progress in meeting the goals created for each of the performance criteria (Communication, Technical, Teamwork, Dependability/Reliability) for this current evaluation period.

**Note:** The employee and the supervisor EACH have a SEPARATE section in order to list results.

### When

Employees may enter results once the goals for the upcoming year have been **Approved** in EvalS. Results must be entered into EvalS no later than 30 days before the end of the evaluation period.

### Entering Results

You will receive an email message reminding you that your results are due, CLICK on the link which will take you to your My OSU Home Page. Use your ONID user name and Password to log on. You will receive an email message 60 days prior to the end of the performance evaluation period.

### E Mail

*Subject: Action Required: Performance Evaluation Results Due*

*It is time to enter your Performance Evaluation Results for your <Position Title> position for the <review period> review period. You will enter results describing how you met goals in the areas of Communication, Teamwork, Technical Skills, and Dependability/Reliability. Please complete this task within <30> days.*

Use the following link to access the EvalS System:

<https://myosu.oregonstate.edu/web/myosu/employee>

In the **Notifications / My Evaluation Actions**, click on the **Results Are Due** message which will move you to the **Employee Results** sections for each Performance Criteria where you can enter your results.

## Results Due Stage

Home Settings Roles

Notifications

My Evaluation Actions

- Software Architect Results Due for 07/26/11 - 07/26/12 in 300 days

My Administrative Actions

No administrative actions required

My Status

Job Title	Review Period	Status
Software Architect	07/26/11 - 07/26/12	Results Due
Regal Mailer	07/26/11 - 07/26/12	In Review

Helpful Links

- Performance Evaluation Cycle
- Performance Evaluation Forms for Professional Faculty
- FAQ User Help
- Business Centers

Notifications Area: As it gets closer to the due date for results, you will see a notification that results are due to be entered.

My Status Area: The status changes here to "Results due", indicating that it is time to enter in your results and submit them to your supervisor.

REMEMBER: You can start entering in draft results once your goals are approved, and do not need to wait until the end of your review period when your results become due.

Evaluation Details

Goal #1

Play nice. Play fair. Include others.

Added later.

Communication<sup>(?)</sup>  Reliability/Dependability<sup>(?)</sup>  Teamwork<sup>(?)</sup>  Technical Skills<sup>(?)</sup>

Employee Results

employee results #1.

Supervisor Results

supervisor results for #2.

Enter the results related to your goals **for EACH GOAL in the text box labeled EMPLOYEE RESULTS**. Your supervisor has a separate text box to enter the results they have noted in your performance. You may enter results only in the employee results sections. Once you have entered the results click on **Save Draft**.

**NOTE:** Your supervisor does not have the ability to modify the results you enter in the Employee Results sections.



You may enter results any time after the goals are approved, however, you will not have the option to **SUBMIT** your results earlier than 60 days prior to the end of the evaluation period. Before then, you may only select **SAVE DRAFT**.

When you have completed entering your results, go to the bottom of the page and select **Save Draft**.

If you need to edit your results go through the same log on steps to enter EvalS and you may edit your results. Then go to the bottom of the page and you may select **Save Draft** again.

Once the Employee Results Sections are **complete and final** you will select **SUBMIT RESULTS**.

**NOTE Please be sure you are finished entering results before selecting SUBMIT RESULTS.**

**WARNING: Once you SUBMIT your results, you cannot make any additional edits to them.**

When you have submitted your results, the status of the evaluation in EvalS will change to “**In Review**” in the **My Status** section. It will remain in that status until your supervisor has completed their supervisor results section, the appraisal summary, and they have indicated your performance rating. Before releasing the evaluation to you, your supervisor will schedule a meeting to review all of the information.

## **APPRAISALS and SIGNATURES**

Your supervisor will schedule a time to discuss your results, your overall appraisal for the evaluation period and your performance rating. When the conversation is complete, your supervisor will “**release**” the evaluation to you, the employee. The supervisor’s appraisal summary and performance rating cannot be modified or edited.

You will receive an **email** indicating that your appraisal has been released to you. **CLICK on the link** and it will take you to the My OSU Home Page log in. Use your ONID user name and password, and you will see the My OSU Home Page with the EvalS information on the right hand side.

E Mail

*Subject: Action Required: Performance Evaluation Signature Due*

*Please acknowledge that you have read your performance review. If you have not already received a copy of the review from your supervisor, you may print it from the EvalS system.*

*Use the following link to access the EvalS System:*

<https://myosu.oregonstate.edu/web/myosu/employee>

Check in the **Notifications / My Evaluation Actions** section, and then **click** on the “**Signature Due**” message. You will then be able to view your entire performance evaluation.

The screenshot shows a web-based performance appraisal form. At the top, there is a section titled "Select a rating" with four radio button options: 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. "Fails to meet performance requirements of the position in major or critical areas.", and 4. "No rating". Below this is a checkbox labeled "I acknowledge, I've read this performance appraisal." To the right of the checkbox is a button labeled "I want to submit a rebuttal". At the bottom of the form are two buttons: "Save Draft" and "Sign Appraisal".

## Signatures and Rebuttals

Once you have had the opportunity to review your completed performance evaluation you will electronically “sign” it, and have the opportunity to submit a rebuttal if you choose to.

The employee will click in the box next to the statement **“I acknowledge I’ve read this Performance Appraisal”**.

An employee’s “signature” reflects that the employee has seen and had an opportunity to review the evaluation with the supervisor. The employee’s signature does not mean s/he agrees with what is written.

### Rebuttals in EvalS

At the same time you “sign” the evaluation in EvalS you have the opportunity to enter a written rebuttal in the EvalS system. If you choose to do so, make sure you have the text of what you wish to enter available when you are going to “sign” the evaluation. You must enter a rebuttal at the same time you electronically “sign” the evaluation if you want the rebuttal to be in the EvalS system. You may not return to EvalS later to submit a rebuttal in the system. **You MUST select “Sign Appraisal” after entering your rebuttal in order to have it in the performance evaluation in EvalS.**

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

Go to the **I Want to Submit a Rebuttal** button. **Click on that button** and a text box will provide you with the space to enter your rebuttal in the space provided.

### Signing the Evaluation

Below the statement you click **“Sign Appraisal”**.

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

I acknowledge, I've read this performance appraisal.

I want to submit a rebuttal

I acknowledge, I've read this performance appraisal.

Rebuttal

An email message will be sent to your supervisor and a Business Center HR contact if you submit a rebuttal in EvalS. The supervisor will then read the rebuttal and indicate that they have read it. You will then receive an email message letting you know that your supervisor has read the rebuttal.

When the Performance Evaluation process has been completed you will receive the following email

*Subject: Notification – Performance Evaluation is Complete*

*Your performance evaluation for the <review period> review period is now complete. If you have not already received a copy of your completed performance evaluation, you may print one from the EvalS system.*

*Use the following link to access the EvalS System:*

<https://myosu.oregonstate.edu/web/myosu/employee>