

EvalS IT – Online Training Script

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This session will review the fundamentals for utilizing the on-line performance evaluation application for classified IT employees titled EvalS.

From November 1st, 2013 through the end of December 2013, employees and supervisors may continue to use the current paper evaluation forms, or they may choose to use the on-line EvalS application. For evaluations with an end date of January 2014, you must use EvalS to complete the evaluation.

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EvalS can be found by going to the myOSU portal and logging in using your ONID password.

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Once at the myOSU portal front page, select **Employee** at the top of the page and EvalS will appear at the bottom right hand side of the page. Be sure to click on the **Roles** button and select **Supervisor** or **Employee**, as appropriate.

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The evaluation process contains three key steps. The first is to establish goals for the upcoming evaluation period. The second is to record the employee's results in meeting those goals. The third is for the supervisor to write an overall appraisal summary of the employee's performance for the current year, designate a performance rating, and determine the appropriate salary recommendation.

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The employee begins the process by entering goals into EvalS. That process can occur starting in the last 30 days of the current evaluation period and must be completed by the end of 30 days into the new evaluation period. That allows 60 days to complete the process of entering goals, working through any modifications, and obtaining supervisor approval for the goals. If you decide to utilize EvalS as your format for the current year, the goals that have already been established need to be entered into EvalS.

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This is a screen shot of the EvalS section for entering goals. You will notice that goals are associated with one or more of the performance criteria, which include communication, teamwork, technical, and Dependability and Reliability.

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At least one goal must be entered for an employee. One or more of the performance criteria must be selected for each goal. If you need to add more goals than the space provided, simply select **Add Goals**. If you need to delete a goal, select **Delete Goal**.

When entering goals, an employee can start work and select **Save Draft** to allow them to return and make changes. Once the changes are complete, the employee will select **Submit**. The supervisor will review the goals and may request changes, make changes on their own, or request that the goals be modified. Please note that the conversation between employee and supervisor in crafting the goals is the most significant part of the process.

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This screen shot illustrates the space and options a supervisor has to review goals submitted by the employee. Ultimately, the supervisor is the one who will approve the goals.

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To assist the employee and supervisor in understanding each of the performance criteria, a definition has been provided for each one.

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An expanded description of the behaviors related to each performance criterion has been created and is available at the EvalS website. These are valuable aids when crafting goals. Each document will identify the typical behavior of an employee who exceeds, who meets, or who is not meeting expectations.

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Here is an example of the “communications” performance criterion or competency. It describes behaviors that exceed, meet, or do not meet expectations in communications.

Once the goals have been approved, the employee and supervisor may begin tracking results.

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The second key step in the Evals process is documenting and entering the results the employee attains in reaching their goals. There are two text boxes to document results. One is for the employee, and there is a separate text box for the supervisor.

Once the goals have been approved, you may begin to enter results. You can enter results throughout the year, or wait until results are due near the end of the evaluation period.

You will receive an automatic email 60 days prior to the evaluation due date alerting you to begin finalizing results.

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This is a screen shot of EvalS with a view of the results sections. Employees and supervisors cannot edit or change the results of the other.

A supervisor will not be able to view the employee results sections until they are submitted by the employee.

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The employee is expected to finalize their results 30 days prior to the evaluation due date. Once the employee has edited and completed their results, they will click on **Submit Results**.

The supervisor will not be able to see the employee results until they are submitted. The supervisor will finalize their documentation of the employee's progress on each goal and write an assessment of the employee's overall performance.

If the employee submits their results on time, the supervisor will have 30 days to complete the evaluation process.

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The supervisor is responsible to complete the appraisal section. This section builds on the results and presents an overall assessment of the employee, illustrating how the employee performed through the evaluation period.

In addition, the supervisor is required to provide a rating for the employee.

The three options are

- 1 – Indicating the employee consistently exceeds expectations
- 2 – Indicating the employee consistently meets expectations
- 3 – Indicating that the employee has not met expectations in significant or critical areas.

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IT Supervisors have an additional task that non-IT supervisors do not.

They must enter a Salary Recommendation. The recommendation is based upon the rating indicated for the employee.

- If the employee is rated a 1, EvalS will provide the appropriate percent range for submission. Remember that recommendations may not exceed the percent range and the dollar amount cannot exceed the upper limit of the salary range.
- If the employee is rated a 2, EvalS will automatically populate the increase, based on the collective bargaining agreement and the employee's current salary relative to the control point.
- If the employee is rated a 3, EvalS will set the recommendation to zero percent.

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This is a slide illustrating the third key step, the Appraisal.

There is a section for the performance summary.

Next is the Rating Section.

Then the Salary Recommendation area.

A supervisor can save the draft or submit the evaluation for review by Human Resources in the Business Center.

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It is highly recommended that the Appraisal Steps be completed at least a week prior to the evaluation due date.

Human Resources will review the content and may provide written comments with recommendations through Evals. These comments will not be available to the employee. If necessary, Human Resources may call the supervisor to discuss a particular issue.

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When the review is complete, it will be returned to the supervisor.

The next step is critical in the evaluation process. The supervisor will print out a copy of the evaluation for the employee and their own use. The supervisor needs to schedule a meeting with the employee to review the entire contents of the evaluation.

This should be done BEFORE releasing the evaluation to the employee. The meeting with the employee may provide information that could cause a supervisor to make changes to the evaluation.

Once the evaluation is released to the employee, no further changes can be made.

When the meeting is complete and all changes are entered, the supervisor will release the evaluation to the employee.

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When the evaluation is released to the employee, the next step is for the employee to click on the signature and electronically sign the evaluation. The electronic signature does not indicate agreement. It only signifies that the employee has received the evaluation and discussed it with their supervisor.

The electronic signature completes the evaluation process, unless the employee chooses to submit a rebuttal.

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An employee may choose to include a rebuttal within Evals. However, it must be done at the same time as the signature. If necessary, it is advisable to write out a rebuttal before signing and then copy it into Evals or transcribe it into the appropriate area. The supervisor will automatically be notified that a rebuttal was submitted.

Per the collective bargaining agreement, the employee also has the option to submit a separate rebuttal outside of Evals by submitting it to Business Center Human Resources within 60 days of the evaluation release date.

An evaluation cannot be grieved per the collective bargaining agreement.

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This slide illustrates the performance evaluation cycle over a year.

Please note – You have 30 days into the new evaluation period to submit goals.

Once goals are approved, results can begin to be entered.

Results should be completed 30 days before the end of the evaluation period.

You may begin creating goals for the new upcoming performance evaluation period 30 days prior to its beginning. This allows you to maintain consistency between the results of one period and the goals of the next.

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More support materials are available at this website including:

- User Guides
- Flow Charts
- Performance Standards
- and help in Writing Goals

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When writing goals, use the S M A R T methodology. That is, goals need to be

- Specific
- Meaningful
- Agreed To
- Reality Based and
- Time phased

Ask yourself why the goal is important? Can you answer how you will know if the goal has been achieved?

The performance evaluation process can set the context for a full year of performance and allow the employee and supervisor to be clear about what is expected.

The EvalS process helps ease the burden of recording the information, provides timely messages to remind you when action is required, and allows easy access to the information throughout the year.

If you have questions or need assistance, please contact your Business Center Human Resources team.