

EvalS Performance Evaluation Management System

Classified IT Supervisor Guide to EvalS / Revised August 2014



IT Supervisor User Guide to Evals –

Logging on to the Evals System

You will receive an email when you need to complete a task in Evals. Click on the appropriate link within the email and it will bring you to your My OSU log on. Use your ONID user name and password to log on. You will now see your My OSU home page. You may click on either “Employee” or “Supervisor”. The Evals section will be on the right side of the page.

OR

Log onto the Evals System

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

Use ONID User Name and Password to log on

You will arrive at the MYOSU Welcome Page. Click on either “Employee” or “Supervisor”

At your My OSU home page, the Evals information will appear on the right hand side of the page

The screenshot shows the My OSU Employee page. At the top, there is a navigation bar with the 'Employee' tab selected. Below this, the page is divided into several sections: 'Time & Leave', 'OSU Today / COF Today', 'Employee Quick Links', 'My Employment Details', and 'Technology'. An orange callout box points to the 'Employee' tab in the navigation bar, stating: "Clicking on Employee tab brings you to the employee screen, where you will find the Evals Portlet". Another orange callout box points to the 'Evals' portlet in the 'Employee Quick Links' section, stating: "You'll see the Evals portlet here in this area".

Look for the tab in the Evals section titled ROLES. Click on ROLES, and select SUPERVISOR

Note: You can access the evaluation information for any of your employees by looking at the EvalS section titled **My Team**, and clicking on their name.

EvalS Home	Settings	Reports	Roles
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Supervisor view. Select a different role above for more options.

⚠ EvalS is now the official process for all Classified, non-IT employee performance evaluations. Paper copies will no longer be accepted as of February 1, 2012. You must have a valid ONID user name and password to access EvalS. Please sign up for one of the weekly 90-minute training sessions available if you need help getting started on EvalS.

▲ Notifications

My Evaluation Actions

No actions required

My Administrative Actions

- [Adams-EVALS, John Test2 Results Due for 01/01/13 - 12/31/13 in 99 day\(s\)](#)
- [Madison-EVALS, James Test4 Goals Approval Due in 148 day\(s\)](#)
- [Luminis-LUM, Employee2 Goals Overdue for 10/01/12 - 09/30/13 by 286 day\(s\)](#)
- [Madison-EVALS, James Test4 Goals Overdue for 10/01/12 - 09/01/13 by 286 day\(s\)](#)
- [Monroe-EVALS5, James Test5 Goals Overdue for 12/01/12 - 11/30/13 by 225 day\(s\)](#)

▲ My Team

Name	Appointment Type	Review Period	Status
Adams-EVALS, John Test2	Classified	01/01/13 - 12/31/13	Results due
Madison-EVALS, James Test4	Classified IT	02/01/13 - 07/31/13	Goals approval due
Luminis-LUM, Employee2	Classified	10/01/12 - 09/30/13	Goals Overdue
Madison-EVALS, James Test4	Classified	10/01/12 - 09/01/13	Goals Overdue

Note: If you need to return to the EvalS beginning section at any time, look for the tab titled, **“Home”** and click on it.

Helpful Hint: Having the information you wish to enter into EvalS available on a separate piece of paper will allow the process to be quicker and smoother.

GOALS

Purpose: To assist supervisors of classified employees to review the goals a classified IT employee has submitted and to enter any additional goals into the EvalS system.

Overview –

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

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

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

When to review and enter Goals –

Goals are due to be entered and approved in EvalS for the new evaluation period no later than 30 days after the start of the new evaluation period. You will be prompted to review the goals section once your employee has submitted their goals.

Note: This is the ideal time to review and update the employee’s Position Description if necessary. The position description can be viewed and a copy downloaded by clicking on the Position Description tab at the top of the EvalS form.

How to review and enter Goals–

Log onto the EvalS system and **click on Roles and select Supervisor**

The Notifications Section will have messages about upcoming deadlines in the **My Administrative Actions** area. (I.e. Bennie Beaver goals are due would appear starting 30 days prior to end of the evaluation period).

If it indicates that goals need to be entered, **CLICK on that message** (ex. Benny Beaver

Goals Approval Due) and EvalS will take you to the appropriate section for the goals for that employee.

Entering Goals

The full definition for each performance criteria is revealed by hovering over the title

if you need to delete a goal click here above the goal text

if you need to add additional goals click here

You have the option to Save a Draft or Submit your goals for approval when you are ready

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 they have been fully edited and agreed to.

Communication^(*) Reliability/Dependability^(*) Teamwork^(*) Technical Skills^(*)

Goal # 5

Communication^(*) Reliability/Dependability^(*) Teamwork^(*) Technical Skills^(*)

Add Goal

Save Draft Submit Goals

Delete this goal?

Reviewing the Goals Submitted by the Employee

Once your employee has finalized and entered the goals they would like included they will select **SUBMIT GOALS**. As the supervisor, you will receive an email, and/or you will see that you need to review and approve goals in the **Notifications/ My Administrative Actions** section.

Email

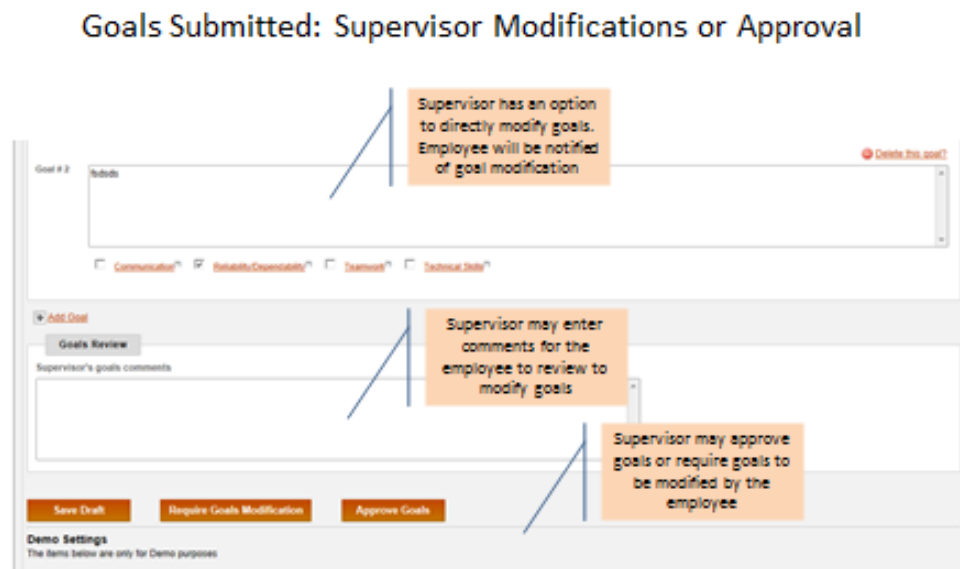
Subject: Action Required: Employee Performance Evaluation Goals Submitted for Review/Approval

The goals for <employee name>, <position title>, for the <Review Period> have been submitted and are ready for your review. Before approving these goals, please have a discussion with your employee to ensure these goals are achievable and realistic, and appropriate to the employee's position duties. You may notify the employee via the EvalS system if modification to the goals is required.

Use the following link to access the EvalS System

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

As the supervisor, you do have the ability to modify, add, or delete the goals directly in EvalS. Or, you may select the option **Goals Require Modification**. There is a text box available for you to provide feedback labeled **Supervisor Goal Comments**. Selecting the option **Goals Require Modification** will trigger an email to the employee indicating that they need to have further discussions with you and make the appropriate changes. The employee will then re-submit the goals in EvalS.



Once the goals are entered and have been finalized, the Supervisor will make the selection **Approve Goals**.

You may review and edit the goals the employee submitted and you can edit the performance criteria(s) selected. When you have completed editing and entering the goals, go to the bottom of the page and select **Save Draft**

If you need to make additional edits to the goals, go through the same access steps.

Look at the **My Team** section and click on the employee name whose goals you need to edit. Make your edits and go to the bottom of the page and select **Save Draft** again.

WARNING: MAKE SURE BOTH YOU AND THE EMPLOYEE HAVE FULLY COMPLETED ALL EDITS TO THE GOALS BEFORE SELECTING APPROVE GOALS

Please be mindful of the possible options concerning Goals in EvalS:

Save Draft – Will keep the goals available for editing

Goals Require Modification – This will signal to the employee the need to have further conversation regarding the goals and to make the appropriate changes.

Approve Goals – Signals that the process of goal setting is final and complete.

WARNING: Once the goals are **Approved in EvalS** they should only be changed if the job substantially changes, or the employee accepts another job.

RESULTS

Purpose: To assist supervisors of classified IT employees to enter results into the EvalS system.

Overview –

The **Supervisor Results** sections of EvalS documents the employee’s progress in meeting goals created at the beginning of the current review period.

The employee and the supervisor EACH have a SEPARATE section for entering results for each of the goals. (Communication, Technical, Teamwork, Dependability/Reliability)

When to enter Results –

Results **may** be entered any time after the **GOALS** have been **approved**. They are **due** to be entered into the EvalS system 30 days before the end of the current performance evaluation period.

How to enter Results –

An email will alert you 60 days prior to the results being due.

E Mail

Subject: Action Required: Performance Evaluation Results and Appraisal Due

It is time to enter the Performance Evaluation Results and complete an Appraisal for <Employee Name> for the <review period> review period. You will enter results describing how your employee met the goals entered at the beginning of the review period. You will also complete the Supervisor Appraisal section. Please complete this task within <30> days.

Use the following link to access the EvalS System:

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

You may click on the link provided to bring you to the My OSU log in. Use your ONID user name and password to log in. When you see the My OSU Home Page the EvalS section will be on the right side of the page. Be sure to **click on the ROLES tab** and **select your role as Supervisor**.

In the **Notifications /My Administrative Actions** area, you will see a message indicating that the results for your employee are coming due (i.e. Benny Beaver results are due will appear 60 days prior to end of the evaluation period).

Click on the Supervisor Results Due message and it will bring you to the Results section for that particular employee

Note: If you are entering results for the employee throughout the year, log on to you My OSU page, select your role as supervisor, and look for the **My Team Section in the EvalS area**. **Click on the employee name and it will take you to their evaluation.**

ALERT – Outside of 60 days prior to the results being due, you may only select SAVE DRAFT after entering results information in the Supervisor Results sections.

Enter the **results related to each goal** set for this employee. Your input to their results will be entered in the text box labeled **SUPERVISOR results**. You will notice that your employee has a separate text box to enter the results they have noted regarding their performance. **You may enter results in the SUPERVISOR results sections, but not in the EMPLOYEE results sections. Unlike goals, you cannot edit the Employee Results sections.**

The screenshot shows a web interface titled "Entering Results by the Supervisor". It features a "Technical Skills" section with a "Goals" text box and a "Supervisor Results" text box. A "Save Draft" button is located at the bottom left. Three callouts provide instructions: an orange callout points to the "Supervisor Results" box stating "Supervisor may start entering in results when goals are approved"; another orange callout points to the "Save Draft" button stating "Both employee and supervisor only see a 'Save Draft' button because results are not due into HR"; and a blue callout box at the bottom right states "NOTE: Supervisor draft results are only available to the supervisor."

Note: A supervisor will not be able to view the employee results until they **SUBMIT** the results.

Note: Be sure to emphasize how the results relate to the progress the employee has made regarding the associated performance criteria(s) (Communication, Technical, Teamwork, and Dependability/Reliability). Notice that each results section has a 3,000 maximum character limit. When you have completed entering the results, go to the bottom of the page and select **Save Draft**

If you need to edit the results - Go through the same access steps and you may edit your results by **selecting the name of the employee in the My Team Section**. Then go to the bottom of the Results page and select **Save Draft** again.

Once the results are complete from both you and your employee, go to the bottom of the page and select **Save Draft**.

Before you can take the next step (Submitting the Appraisal for Review) you must also complete the Appraisal Section and determine the Performance Rating for the employee.

COMPLETING THE APPRAISALS AND DETERMINING A PERFORMANCE RATING

Once you have completed inputting the results, you will need to write an overall appraisal summary that reflects the employee's performance over the entire evaluation period. You will find a text box labeled **Overall Evaluation** where you will enter your comments.

Note: Be sure to include relevant information, including mitigating circumstances where goals were not completed. It is helpful to include not only the result (goal completion), but to add comments concerning how the goal was completed. That is, their approach and the effects of that approach. In addition, if you determine that there are areas of deficient performance, make sure that they are noted in the Appraisal Summary.

In addition to the appraisal summary, you are required to select the overall **Performance Rating** for this employee. You have three choices:

- Consistently Exceeds Standards
- Meets Standards
- Does Not Fully Meet Standards

The Appraisal Step

The supervisor enters their evaluation comments after results are entered by both the employee and supervisor

The supervisor selects the appropriate rating for the employee

The supervisor will enter the appropriate salary recommendation based on the employee rating

The supervisor can save as a draft to continue working on later, or submit the evaluation for HR Review

Appraisal Summary

Overall Evaluation

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	(Range 3-4)	\$3,500.00	04/01

Save Draft Submit Appraisal

Note: Once the evaluation has been reviewed by HR, the supervisor should have a conversation with the employee about the entire evaluation PRIOR to releasing it to the employee for signature. Once the evaluation is released the employee may view the entire evaluation in EvalS

Once the results and appraisal sections are finalized and the Performance Rating is selected, you will move to complete the **Salary Recommendation Section**.

Completing the Salary Recommendation Section

The Salary Recommendation Section is the place in the evaluation the supervisor indicates the appropriate base pay recommendation that corresponds to the 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.

Once the results and overall evaluation sections are complete, the Performance Rating has been selected, and the salary recommendation sections are finalized you may then select **Submit Appraisal for Review**.

WARNING: The collective bargaining agreement requires providing written notice to an employee of withholding of a performance increase at least fifteen (15) days prior to the employee’s eligibility date and must state the reasons why the increase is being withheld.

Note: The collective bargaining agreement provides that if an IT employee’s supervisor has not completed the employee’s performance evaluation by 30 days after the employee’s eligibility date, upon request by the employee, the University Human Resources Department will notify the supervisor in writing that the performance evaluation is overdue, with a copy to the affected employee. If the supervisor has not completed the performance evaluation by ninety (90) days after the employee’s eligibility date, the employee will be given a base pay increase based on a “Meets Standards” rating retroactive to the employee’s salary eligibility date.

Business Center Human Resources Review

When the supervisor selects **Submit Appraisal for Review** the evaluation is ready in EvalS for the HR Reviewer in your Business Center to review the entire evaluation. **An email will be sent to the designated HR Reviewer** within the Business Center HR department.

The HR Reviewer will scan the content of the evaluation and ensure that the salary recommendation is in compliance with the collective bargaining agreement provisions. There is a section where their comments can be entered – **HR Comments**

The screenshot shows a web interface for entering HR comments. At the top, there is a tab labeled 'HR Comments'. Below the tab is a large text input area with a light blue background and a placeholder text that reads: 'This is where the HR reviewer would type in the comments for the supervisor'. At the bottom of the form, there are two buttons: 'Save Draft' and 'Submit Review'.

If the HR reviewer has concerns, questions, or suggested modifications, it is likely they will contact you for some additional conversation.

Note: Only the supervisor and the HR Reviewer have the ability to view the HR Comments. At no time will they be available for the employee to review

The Business Center HR reviewer will then submit the review in EvalS

That will trigger an email to the supervisor, and a message in the EvalS Notifications – Administrative Actions section that the Performance Evaluation is **ready for Release to the employee**.

You will receive the following email once the HR Review is complete

E Mail

Subject: Action Required: Performance Evaluation Release Due

The performance evaluation for <Employee Name>, <Position Title>, for the <Review Period> review period has been reviewed by the Business Center HR representative and is now ready to be released to the employee. Please discuss the results and appraisal with your employee prior to releasing the evaluation in EvalS

Use the following link to access the EvalS System

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

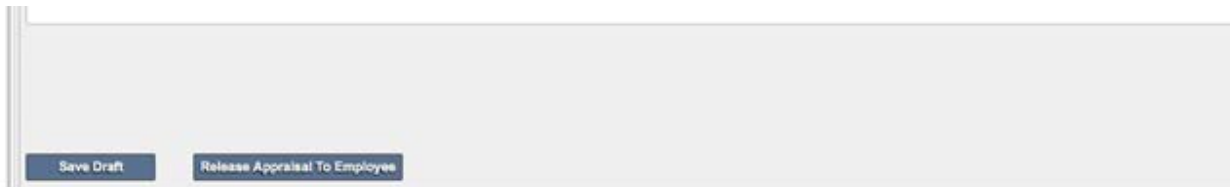
EVALUATION CONFERENCE, RELEASE and SIGNATURES

When the performance evaluation has been reviewed and ready for release, that is the opportunity for the supervisor to make any modifications they discussed with the HR Reviewer.

As the supervisor you will schedule a time with your employee to discuss the results, your overall appraisal of the employee, their performance rating, and salary recommendation for the evaluation period.

When that conversation and meeting is complete, it is the opportunity to make any final modifications.

Only after the meeting with the employee will you go into EvalS and **“release”** the evaluation to the employee.



The employee will receive an email indicating that their evaluation has been “released” and their signature is due. They will be able to view the entire contents of the evaluation, with the exception of any comments from the HR Reviewer.

Employees have no ability in EvalS to alter or edit the supervisor’s entry into results, the appraisal summary, the rating of their performance, or the salary recommendation.

Signatures and Rebuttals

Once the employee has received the email and had the opportunity to review the completed performance evaluation in EvalS, they will electronically “sign” it, and have the opportunity to submit a rebuttal if they choose to.

Signing

The employee will click on the box next to the statement **I acknowledge I have read this Performance Evaluation.**

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

Rebuttals in EvalS

At the same time the employee electronically “signs” the evaluation in EvalS; they have the opportunity to submit a written rebuttal in the EvalS system. If they choose to do so, and want the rebuttal to be in

the EvalS system, they must enter 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 separately within 60 days to the Business Center Human Resources Department. It will then become a part of the employee's personnel file.

If a rebuttal is submitted into EvalS, the supervisor will be notified with an email message and a notice in the Notifications section of EvalS. By clicking on that message, the supervisor can read the rebuttal and will **select the option I have read this rebuttal.**

E Mail

Subject: Action Required: Employee Rebuttal Submitted to Performance Evaluation

Your employee, <Employee Name>, has submitted a rebuttal to the <Position Title>, <review period> review period performance evaluation. Please review the rebuttal, and contact your Business Center HR Representative if further action is required.

Use the following link to access the EvalS System:

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

An email message will also be sent to a Business Center HR contact notifying them that a rebuttal has been submitted.

The signature and any rebuttal bring to a close the evaluation cycle. Once one evaluation period is complete, formulating new Goals will quickly be required for the new evaluation period.

You will receive the following E Mail confirming that the Performance Evaluation is complete

E Mail – To employee with cc to manager

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>

CLOSING A PERFORMANCE EVALUATION DUE TO AN UNEXPECTED CHANGE

Under the following circumstances a supervisor should contact an EvalS Administrator to request CLOSING the evaluation earlier than the due date.

- Job Termination of the employee being evaluated (Promotion, Transfer, Layoff, Retirement, Trial Service Removal, Dismissal, or Promotional Trial Service Removal)
- Position on Leave (Long-term leave, not summer job on leave)
- Refused to sign the performance evaluation

If an employee refuses to sign the evaluation after 60 days from release you should print out a copy of the evaluation and have two managers sign the document noting that the employee declined to sign. Save a copy for your supervisor file and send a copy to Human Resources in the Business Center so they can scan the evaluation into the electronic personnel file. Contact the EvalS administrator or Business Center to close the evaluation.

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