

EvalS Performance Evaluation Management System

EMPLOYEE USER'S GUIDE

For Professional Faculty Employees



Employee Users Guide to Evals

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

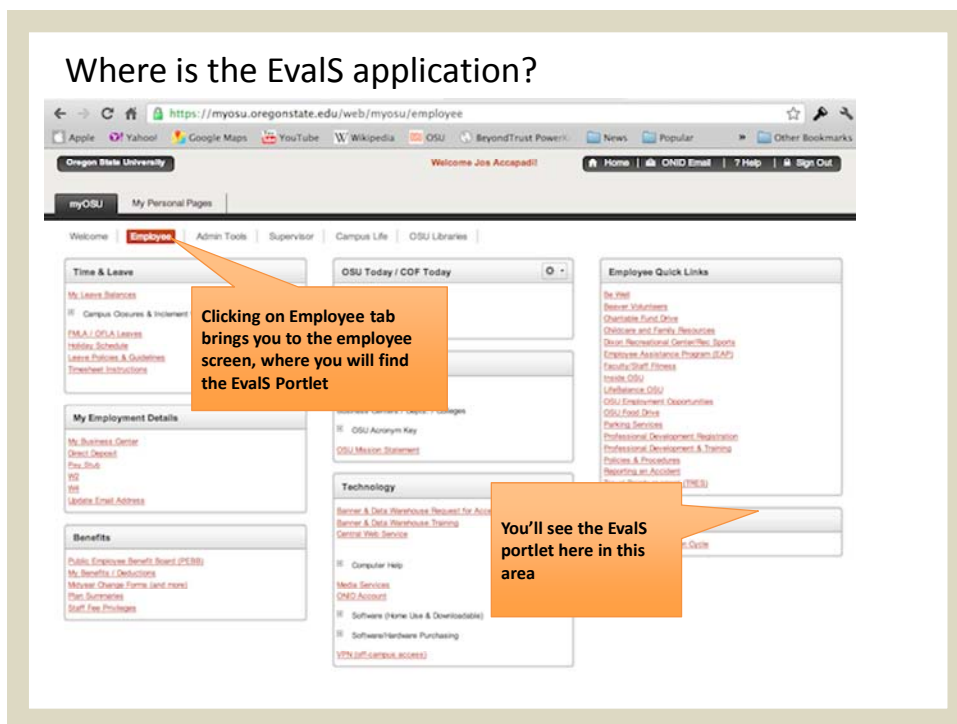
Logging on to the EvalS System on the computer

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 lower 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 after the beginning of the evaluation period.

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 professional faculty 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.

When –

Employees enter goals near the beginning of the performance evaluation period or when your supervisor initiates an evaluation in the system for you. Goals are due to be entered and approved in 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 30 days prior to the beginning of the evaluation cycle.

Subject: Action Required Performance Evaluation Goals are due

A performance evaluation has been initiated in the EvalS system for you. Your performance goals for the <Position Title> position for the <review period dates> review period are due on <date>. You must enter at least one goal. For each goal you must select at least one evaluation criterion. When setting goals, please consult your position description which is available on the EvalS page. Please complete this task within 60 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 lower right hand side of the page. In **the Notifications / My Evaluation Actions** you will see a message informing you that your goals are due.

<p>▲ Notifications</p> <p>My Evaluation Actions</p> <hr/> <ul style="list-style-type: none"> • Advisor Goals Due for 05/22/14 - 05/21/15 in 40 day(s) 								
<p>▲ My Evaluations</p> <table border="1"> <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>Goals Due</td> </tr> </tbody> </table>			Job Title	Review Period	Status	Advisor	05/22/14 - 05/21/15	Goals Due
Job Title	Review Period	Status						
Advisor	05/22/14 - 05/21/15	Goals Due						

Click on the **Goals Due** message

Before you enter any goals, please follow the instructions at the top of the Evaluation Form where it says **START HERE** and select **“Read Goal Setting Hints”**

The screenshot shows the EvalS web application interface. At the top, there is a navigation bar with 'EvalS Home'. Below this, a prominent blue banner contains the text 'START HERE: [Read Goal Setting Hints](#)' with a left-pointing arrow. Underneath the banner, the page title is 'Professional Faculty Performance Evaluation: Goals Due'. There are two buttons: 'Download as PDF' and 'View Position Description'. A section titled '▲ Evaluation Information' contains a table with the following data:

Employee: Adams-EVALS, John Test2	Supervisor: Tyler-EVALS, John Test9	Job Title: Advisor	Position No: C30134	Job Start Date: 06/22/10
ID: 931944335	Evaluation Type: Annual	Review Period: 05/22/14 - 05/21/15	Status: Goals Due	Rating:

At the bottom of the screenshot, there is a button labeled 'Evaluation Details'.

This will link you to a resource page with important information and will document any special requirements your particular unit or department may have specified.

When you are ready to begin developing your goals you will see the **Goals text boxes** available to type in and enter your goals. Initially, there is room to enter four goals. If you need to enter additional goals, simply click on the “Add Goal” prompt.

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 associated with it (Leadership, Management, Collegiality/Teamwork, Communication, Social Responsibility/Service/Outreach, Professional/Technical Competency). You may view the definitions of each criteria by clicking on the Start Here tab at the top of the EvalS form.

Evaluation Details

Goals to be approved:

Goal # 1 [Delete](#)

[BUSINESS DRIVERS/RESULTS^{\(?\)}](#)
 [COLLEGIALLY / TEAMWORK^{\(?\)}](#)
 [COMMUNICATION^{\(?\)}](#)
 [LEADERSHIP^{\(?\)}](#)
 [MANAGEMENT^{\(?\)}](#)
 [PROFESSIONAL / TECHNICAL COMPETENCY^{\(?\)}](#)
 [SOCIAL RESPONSIBILITY / SERVICE / OUTREACH^{\(?\)}](#)

Goal # 2 [Delete](#)

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.**

Goal # 5

[COLLEGIALLY / TEAMWORK^{\(?\)}](#)
 [Communication^{\(?\)}](#)
 [OUTREACH^{\(?\)}](#)

[Add Goal](#)

Save Draft **Submit Goals**

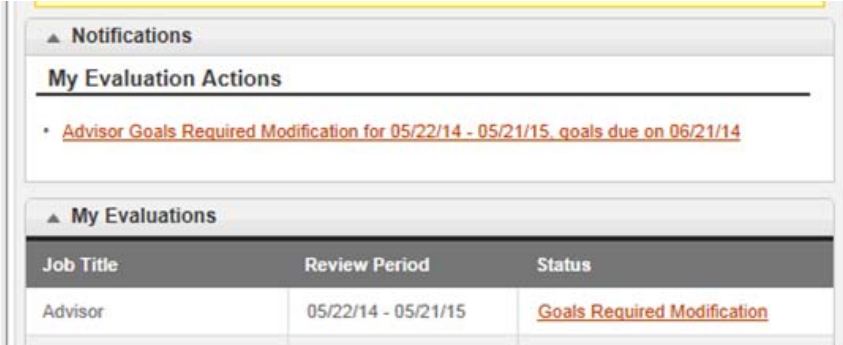
Once goals are submitted, your supervisor will review them. Your supervisor may modify them and/or add/delete goals. Your supervisor may also select **Goals Require Modification**. If the goals require modification you will receive the following e mail:

Subject: Action Required: Modification of Performance Evaluation Goals Needed

Your supervisor has indicated that additional modifications of your performance goals are necessary for your position <position name> for the <dates> review period. Please review your goals carefully as your supervisor may have made changes to them. This action is due on <date>, or 7 days after today, whichever comes later. 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>



The screenshot shows a web interface with two main sections. The first section is titled 'Notifications' and contains a sub-section 'My Evaluation Actions' with a single notification: 'Advisor Goals Required Modification for 05/22/14 - 05/21/15, goals due on 06/21/14'. The second section is titled 'My Evaluations' and contains a table with three columns: 'Job Title', 'Review Period', and 'Status'. The table has one row with the following data: 'Advisor', '05/22/14 - 05/21/15', and 'Goals Required Modification'.

Job Title	Review Period	Status
Advisor	05/22/14 - 05/21/15	Goals Required 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 revisions 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 have been approved you will receive the following e mail:

Subject: Notification: Performance Evaluation Goals Approved

Your supervisor has approved your goals for the <Position Title> for <review period dates> review period. Please review your goals carefully as your supervisor may have made changes to them. You may now begin recording results for your goals as you accomplish them throughout the year. If you need to add additional goals, you can request to do so by utilizing the "Request Goal Reactivation" feature in EvalS.

Use the following link to access the EvalS System:

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

RESULTS

Purpose: To assist professional faculty employees to enter results into the EvalS system.

Overview –

The Employee Results section of EvalS documents the progress in meeting each of approved in EvalS.

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

When

Employees may enter results once the goals for the upcoming year have been **Approved** in EvalS.

Results are DUE to be entered into EvalS no later than 30 days following the end of the evaluation period.

Entering Results

When you 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.

Note: You will not be able to SUBMIT your results until your performance evaluation period is complete. The intention is to be able to review the entire year, not just 11 months.

E Mail

Subject: Action Required: Performance Evaluation Results Due

Your Performance Evaluation results for the position of <Position Title> position for the <review period> review periods are due on <date>. You need to enter results describing how you met your goals that were created at the beginning of the year or added during the year. 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.

REMEMBER: You may begin entering results once your goals have been approved, or you may choose to wait until near the end of the evaluation period.

Enter the results related to **each of your goals** in the **text boxes 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. Each results text box has a limit of 3,000 characters. 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. Your supervisor will not be able to view your results until you actually **Submit** them.

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.

You may **ENTER** results in EvalS 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**.

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 overall summary, and they have indicated your performance rating. The supervisor will then **RELEASE** the evaluation to you for the **EMPLOYEE REVIEW**.

EMPLOYEE REVIEW

When the supervisor **RELEASES** the evaluation for your **EMPLOYEE REVIEW**, you will receive the following message. You will then have 15 days in order to review the full contents of the evaluation and provide your supervisor any comments. **During or following the review period your supervisor will schedule a meeting to review all of the information.**

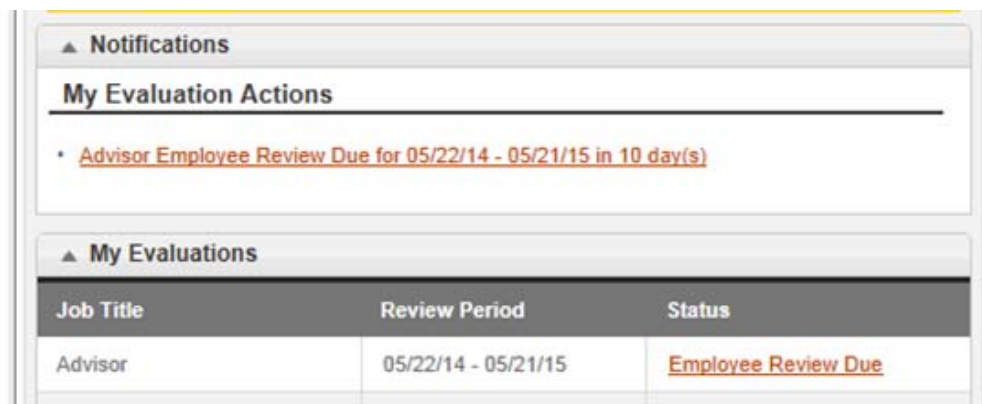
E Mail

Subject: Action Required: Performance Evaluation Released for Employee Review

Your supervisor has released for your review a draft version of your evaluation for the position of <Position Title> position for the <review period> review period. Please complete the review and submit any comments within the next 15 days. If you take no action by then, the evaluation will automatically move to a Release Due status and you will lose your opportunity to include your input for the performance evaluation. Your supervisor will be scheduling time with you to discuss the evaluation and your overall performance.

Use the following link to access the EvalS System:

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



The screenshot shows a web interface with two main sections. The first section is titled 'Notifications' and contains a sub-section 'My Evaluation Actions' with a single notification: 'Advisor Employee Review Due for 05/22/14 - 05/21/15 in 10 day(s)'. The second section is titled 'My Evaluations' and contains a table with three columns: 'Job Title', 'Review Period', and 'Status'. The table has one row with the following data: 'Advisor', '05/22/14 - 05/21/15', and 'Employee Review Due'.

Job Title	Review Period	Status
Advisor	05/22/14 - 05/21/15	Employee Review Due

Once you have completed your EMPLOYEE REVIEW, and added any comments you will **SUBMIT** the evaluation back to your supervisor.

After the evaluation has been submitted back to the supervisor, they have the ability to make any final edits or changes. **Your supervisor should meet with you prior to the evaluation being RELEASED FOR SIGNATURE.** Once the evaluation is released for signature, the supervisor's results, overall evaluation, performance rating, and salary recommendation cannot be modified or edited.

Appraisal Summary

Evaluation

Overall a very good year

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

Employee Review

Employee Comments

Save Draft Submit Review

EMPLOYEE SIGNATURE AND COMMENTS

When the conversations are complete, and any final edits have been made, your supervisor will **RELEASE** the evaluation to you. 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 lower right hand side.

E Mail

Subject: Action Required: Performance Evaluation Signature Due

Your supervisor has released the final version of your evaluation for a <position name> for the <review period dates> review period. Please review and complete your electronic signature. This action is due on <date>.

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.

▲ Notifications		
My Evaluation Actions		
• Advisor Signature Due for 05/22/14 - 05/21/15 in 349 day(s)		
▲ My Evaluations		
Job Title	Review Period	Status
Advisor	05/22/14 - 05/21/15	Signature Due

Signatures and Comments

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

Signing the Evaluation

Employee
Signature
<input type="checkbox"/> 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.
<input type="checkbox"/> I want to submit comments
<input type="button" value="Save Draft"/> <input type="button" value="Sign Evaluation"/>

The employee will click in the box next to the statement **“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.”**

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.

Below the statement the employee will click **“Sign Evaluation”**.

Employee Comments in Evals

At the same time you “sign” the evaluation in EvalS, you have the opportunity to enter written comments 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 comments at the same time you electronically “sign” the evaluation if you want your comments to in the EvalS system. You may not return to EvalS later to submit comments in the system. **To include comments, you will need to select “I want to submit comments.” After they have been entered, you MUST select “Sign Evaluation” after entering your comments in order to have the performance evaluation completed in EvalS.**

An email message will be sent to your supervisor if you submit comments in EvalS. The supervisor will then read the comments and indicate in EvalS that they have read them. You will then receive an email message letting you know that your evaluation process is now complete.

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 position <position name> for the <review period dates> review period is now complete. You may download a copy of the evaluation using the “Download as PDF” link on the appraisal form in the EvalS system.

Use the following link to access the EvalS System:

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

The evaluation is now complete in EvalS

Note: It is strongly advised that you utilize the download as a PDF option on the Evals form and print and retain a copy of the completed evaluation.

TIP: You can always come back to view completed evaluations.

TIP: You should already be working with your supervisor to establish goals for next evaluation period.

Professional Faculty EvalS Timeline

(For an employee whose annual evaluation cycle is from July 1st through June 31st)

June 1, 2014	Create evaluation
July 1, 2014	Evaluation cycle starts
August 1, 2014	Goals Due

September 1, 2014	Goals Approval Due	
October 1, 2014		
November 1, 2014		
December 1, 2014		
January 1, 2015		
February 1, 2015		
March 1, 2015		
April 1, 2015		
May 1, 2015		
June 1, 2015		2 nd Evaluation created
July 1, 2015	Evaluation cycle ends	2 nd Evaluation cycle starts
August, 1 2015	Results Due	
August 15, 2015	Supervisor Appraisal Due	
September 1, 2015	Employee Review due (15 days)	
September 16, 2015	Evaluation Release Due	
October 1, 2015	Signature Due/Evaluation Complete	

Professional Faculty Evals Flow Summary

