EvalS Professional Faculty – On Line Training Script

- Overview

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

Beginning on December 1st, 2014, business units and/or colleges now have the option of utilizing the EvalS system and tools to complete the evaluation process. An organization may also choose not to use EvalS and continue to use the current paper format.

– My OSU Portal

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

– The Evals Portlet

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.

– Creating the Evaluation

If an employee does not have a record in Evals, the supervisor will be notified that they need to create an evaluation for an employee. This slide displays the notice a supervisor will see in the EvalS section on the My OSU portal. The supervisor will then be prompted to designate the appropriate start of the evaluation year for that employee.

– Choosing the Review Period

All employees reporting to a particular supervisor will have the same evaluation period. The evaluation year may also have been determined to be standard within a particular school or business unit. A supervisor has a choice of utilizing the fiscal year (July 1st through June 30th), the academic year (September 1st through August 31st), or the calendar year (January 1st through December 31st). Remember to specify the actual year you would like the review period to begin.

– Start Here for Unit Specific Information

The Professional Faculty version of EvalS allows an organization to customize its approach and requirements for the evaluation process. Those unique instructions, and a wealth of additional information, are available on the Resource Page that is linked to the EvalS form. To access the Resource page simply click on the highlighted START HERE arrow at the top of the form.

– Resource Page Contents

The Resource Page includes resources on creating and setting goals, user guides for both supervisor and employee, any special goal setting requirements by a particular unit or college, the definitions of the performance criteria, the description of the performance rating options, a timeline for the EvalS process and frequently asked questions.

Slide 8 – Evals Process Steps

The evaluation process contains five 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 and designate a performance rating in EvalS. The fourth step is for the supervisor to release the evaluation for Employee Review. At this stage the employee will be able to see the contents and the supervisor will schedule a meeting to review the entire evaluation. The fifth step is for the supervisor to make any final edits, electronically sign the evaluation, release the evaluation for the employee to electronically sign, and for the employee to sign the evaluation and provide any optional comments.

When a particular tasks is required an email message will be sent that will indicate that the process has moved to the next status and will indicate if a task is now required. Only one email message will be sent, but the status and any tasks that are needed to be completed will appear in the EvalS "box" on the portal.

Slide 9 – Step 1 Establishing Goals

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 but 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, any goals that have already been established need to be entered into EvalS.

Slide 10 – Professional Faculty Performance Categories

Each goal must be associated with one or more of the Performance Categories: Leadership, Management, Collegiality/Teamwork, Communication, Social Responsibility/Service/Outreach, Professional/Technical Competency, and Business Driver/Results. That is accomplished by checking one or more of the boxes below the space for entering goals.

Slide 11 – Goals Screen Shot

This screen shot displays the EvalS section for an employee to enter goals. A more complete description of each of the performance criteria can be found on the Resource Page.

– Establishing Goals Related to the Employee's Position

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 Goals.

Slide 13 – Supervisor Review of Goals

The supervisor will review the goals and has the option to 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 one of the most significant parts of the process.

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.

Once approved the employee will receive a message indicated that the goals have been approved and advising them to review them once again, since they may have been changed.

Slide 14 – Reactivating Goals

Should there be substantial changes in the duties of an employee, or a major change in the focus of their job that requires that additional goals be added, the employee can initiate a request to reactivate their goals in EvalS as displayed in this slide. The supervisor can then approve or decline the request. Previous goals may not be deleted, but new goals can be submitted and approved.

Slide 15 – Step 2 Documenting Results

The second key step in the Evals process is documenting and entering the results the employee attains in reaching their goals. Once the goals have been approved, the employee and supervisor may begin tracking results throughout the year, or you may choose to wait until results are due at the end of the evaluation period.

There are two text boxes to document results. One is for the employee, and there is a separate text box for the supervisor.

 You will receive an automatic email prior to the evaluation due date alerting you to begin finalizing results. Until that time results the only selection will be Save Draft. At the end of the review year, the employee will then Submit their results. The supervisor will not be able to view the employee's entry into the results area until they have submitted their results. The employee will not see the supervisor results entries until they release the evaluation for the employee review.

– Results Screenshot

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.

– Step 3 – Finalizing Results, the Appraisal Summary, and the Rating

Once the employee has submitted their results, the supervisor will be sent an email indicating that they need to take these additional steps:

The supervisor will finalize their documentation of the employee's progress on each goal and enter that information in the Supervisor Results section.

Then, the supervisor will write an overall appraisal summary of the employee's performance.   This section builds on the results and presents an overall assessment of the employee illustrating how the employee performed throughout the evaluation period.

– Overall Performance Rating

The supervisor is required to provide a rating for the employee.

The options are:

Exceptional Performance – Indicates that the employee consistently operates well above expectations.

Strong Performance – Indicating that the employee fully meets and often exceeds the expectations of the position.

Satisfactory – Is appropriate for employees who fully meet the overall expectations of the position.

Needs Improvement – This designation should be utilized for those employees that occasional do not meet expectations or they need significant improvement in critical areas.

Does Not Meet Expectations – Employees who consistently do not meet expectations in multiple areas of their position responsibilities should receive this rating.

Another potential option is "No basis for evaluation" – This should be reserved for situations where there may have been significant gaps due to multiple supervisory changes, or where there has been a substantial period of time where the supervisor or employee have been away during the evaluation period. If this option is selected an automatic message to the second level supervisor will be generated as notification.

If the employee submits their results on time, the supervisor will have 15 days to complete this part of the evaluation process.

– Step 4 Releasing the Evaluation for Employee Review

Once the evaluation has been completed by the supervisor, they will select Release the Evaluation for Employee Review.

Slide 20 – Step 5 Releasing the Evaluation for Employee Review

An automatic message will be sent to the employee indicating that they have 15 days to review and provide comment on the evaluation. After releasing the evaluation would be the ideal time for the supervisor and employee to meet and review the full evaluation contents. If the employee makes no response within the 15 days, EvalS will automatically move the evaluation into a Release for Signature Due status.

Slide 21 – Release for Signature

Once the status has moved to Release for Signature Due, the supervisor has 15 days to make any changes. Once all edits have been made, the Supervisor will click the box next to the statement, "I have reviewed the contents of this evaluation with the employee, approve its completion and release to the employee for signature." Then the supervisor will release the evaluation for electronic signature by the employee. Please note that once the evaluation has been released for signature, EvalS will not allow any further changes. This period provides the opportunity to make any final edits or adjustments to the evaluation. The employee will receive a message indicating that the evaluation has been released for signature.

Slide 22 – Employee Signature and Optional Comments

A box on the form will need to be checked indicating the evaluation has been reviewed with the supervisor. It does not indicate agreement, only that the review process has occurred.

At this point, the employee also has the opportunity to indicate that they wish to make optional comments in the appropriate space.

Slide 23 – Optional Comments

If an employee chooses to make comments, the supervisor will be alerted and be prompted to go into Evals and indicate that they have read the comments.

Slide 24 – Finishing the Process

Some additional notes:

It is recommended that a copy of the final evaluation should be downloaded and printed. The employee should retain a copy, the supervisor should retain one, and an additional copy will be automatically filed in the employee's personnel file in NOLIJ.

Remember, the evaluation period consists of a full 12 months. EvalS allow up to 3 months additional time to complete the cycle of entering results, writing the appraisal, indicating a rating, a review by the employee, the supervisor and employee meeting, and releasing the evaluation for signature and comment.

The goals for the new 12 month evaluation period can begin to be entered up to 30 days prior to the start of that annual period.

<mark>Slide 25</mark> – Unique Features of Professional Faculty Evals

In the process of developing the professional faculty version of Evals several unique features were incorporated:

Tailored and enhanced performance categories

The ability for a unit or college to develop specific guidance and requirements regarding goals

Incorporating a step for employee review

A completely different rating system that the other versions of Evals

Ability of the employee to provide whatever comments they wish, both positive or negative

An extended time frame – A full year of performance and an additional 3 months to complete the entire process of evaluation.

<mark>Slide 26</mark> – Additional materials and Support

More support materials are available at this website http://hr.oregonstate.edu/evals including:

User Guides, Flow Charts, Performance Criteria Definitions, Unit specific instructions, and help in Writing Goals

Should you experience an issue or have a question you can send an email to:

employee.relations@oregonstate.edu