

Evals Performance Evaluation Management System

Professional Faculty Supervisor Guide to Evals



Professional Faculty Supervisor User's 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 lower 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 lower right hand side of the page

The screenshot shows the My OSU website interface. At the top, there is a navigation bar with the Oregon State University logo and a welcome message for 'Joe Accapadi'. Below this is a 'myOSU' section with tabs for 'Employee' and 'Supervisor'. The 'Employee' tab is selected. The main content area 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 'Employee Quick Links' section, stating: 'You'll see the Evals portlet here in this area'. The 'Employee Quick Links' section contains various links such as 'Be Well', 'Beaver Volunteers', 'Overlays Fund Drive', 'Options and Events Services', 'State Recreational Services Sports', 'Employee Assistance Program (EAP)', 'Faculty Staff Fitness', 'Health OSU', 'LifeBalance OSU', 'OSU Employment Opportunities', 'OSU Food Drive', 'Parkus Services', 'Professional Development & Training', 'Policies & Procedures', and 'Reporting an Incident'.

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.

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, or saved in a Word document, will allow the process to be quicker and smoother.

INITIALIZING/ENTERING EVALS FOR AN EMPLOYEE

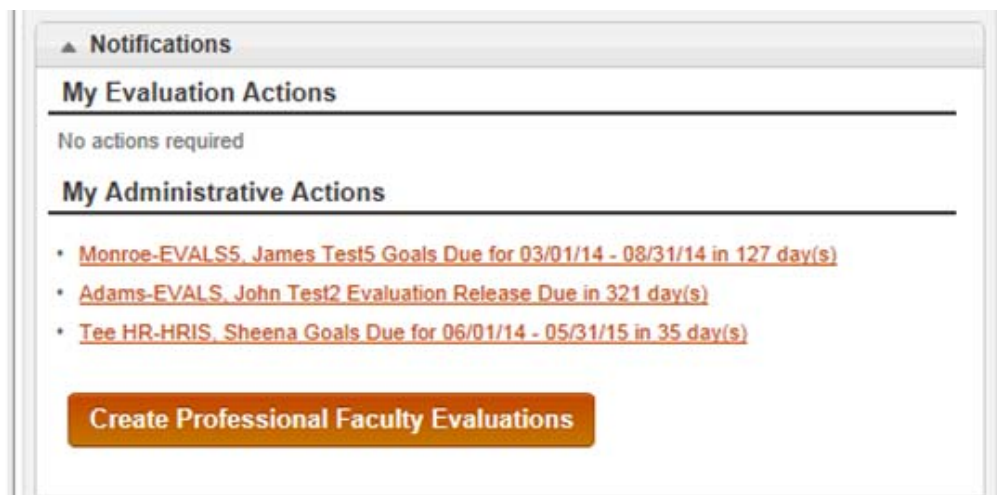
Purpose: To assist supervisors of professional faculty to initially enter employees into the EvalS system and establishing their appropriate annual evaluation period.

How to Initialize or “Enter” Professional Faculty Employees into EvalS

To start the evaluation process, the supervisor must initialize the system for the professional faculty that report to them.

You will first need to determine what the appropriate annual evaluation period should be for your employees. You may choose an evaluation cycle corresponding to the University fiscal year beginning on July 1st or you may choose an evaluation cycle corresponding to the Academic year beginning with September 1st or you may choose an evaluation cycle corresponding to the calendar year beginning with January 1st. Your annual evaluation period will be heavily influenced by the normal business or planning cycle of your business unit or function.

To initialize the evaluation period you will log into EvalS as a supervisor. You will see a panel similar to the one illustrated below. Any employees who have not yet been initialized or “entered” into EvalS will be listed. In the boxes provided you will enter appropriate beginning of the annual evaluation period.



GOALS

Purpose: To assist supervisors of professional faculty employees in reviewing the goals an employee has submitted, and to enter any additional goals into the EvalS system.

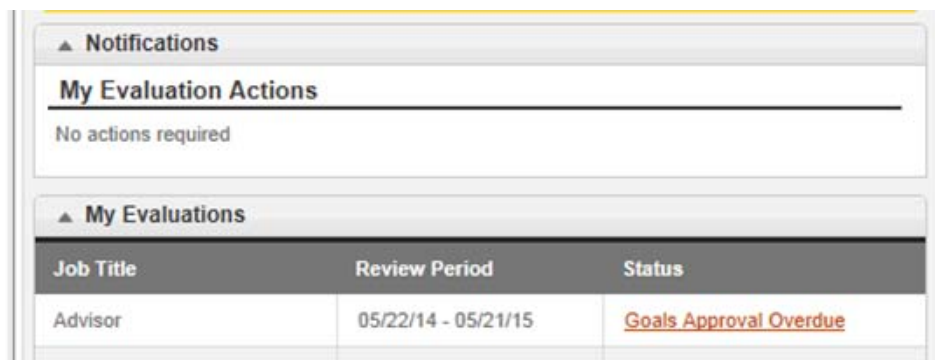
Well crafted goals provide a clear understanding of what is expected and at what level they will be held accountable. They build a partnership between employees and their supervisors and managers in documenting opportunities for meeting evolving business needs, as well as personal and/or career development.

Goals are initially developed and submitted by the employee 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 performance criteria must be selected (Collegiality/Teamwork, Communication, Leadership, Management, Professional/Technical competency, Social responsibility/service/outreach, Business Drivers/Results).

When to review and enter Goals –

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



The screenshot displays a web interface with two main sections. The first section, titled 'My Evaluation Actions', shows 'No actions required'. The second section, titled 'My Evaluations', contains a table with the following data:

Job Title	Review Period	Status
Advisor	05/22/14 - 05/21/15	Goals Approval Overdue

Note: This is the ideal time to review and update the employee's Position Description if necessary.

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 an evaluation period).

If it indicates that goals need to be reviewed, **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.

Evaluation Details

Goals to be approved:

Goal # 1 Delete

BUSINESS DRIVERS/RESULTS²¹ COLLEGIALLY / TEAMWORK²¹ COMMUNICATION²¹ LEADERSHIP²¹ MANAGEMENT²¹ PROFESSIONAL / TECHNICAL COMPETENCY²¹

SOCIAL RESPONSIBILITY / SERVICE / OUTREACH²¹

Goal # 2 Delete

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 performance 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 require the employee to modify the goals via EvalS if you so desire. Once the goals are finalized you will need to approve the goals in the EvalS system. This action is due on <date>.

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.

The screenshot shows a web interface for reviewing goals. At the top left, there is a button labeled "Add Goal". Below it is a tab labeled "Goals Review". Under the tab, there is a text area for "Supervisor's goals comments (optional)". At the bottom of the interface, there are three buttons: "Save Draft", "Require Goals Modification", and "Approve Goals". Below these buttons is a section titled "Demo Settings" with the text "The items below are only for Demo purposes" and two links: "Click here to restart the demo and reset the evaluation to goals due" and "Click here to set the evaluation status to results due".

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**

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.

RESULTS

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

The **Supervisor Results** section 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.

The screenshot displays a web interface for entering performance goals and results. It is divided into three main sections:

- Goal #1:** A text input field contains "XYZ". Below it is a row of checkboxes for various competency areas: BUSINESS DRIVERS/RESULTS^(*), COLLEGIALLY / TEAMWORK^(*), COMMUNICATION^(*), LEADERSHIP^(*), MANAGEMENT^(*), PROFESSIONAL / TECHNICAL COMPETENCY, and SOCIAL RESPONSIBILITY / SERVICE / OUTREACH^(*).
- Employee Results:** A text input field contains the word "Finished".
- Supervisor Results:** A large, empty text input area with a vertical scrollbar on the right side.

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.

Note: Employees are not able to SUBMIT their results until the performance evaluation period has been completed. For example, if the evaluation year ends on June 30, then employees will be able to submit their results on July 1st.

How to enter Results –

An email will alert you that the results are due.

E Mail

Subject: Action Required: Performance Appraisal Due

The performance results for <Name> for the position of <position name> for the <review period> have been submitted in the EvalS system. You need to enter supervisor results describing how your employee met the performance goals defined in the beginning of the cycle or added during the year. You will also complete the Supervisor Appraisal section of the evaluation record, select a performance rating, and submit the evaluation for the employee to review. Please make sure to print and retain a copy of the evaluation at this stage prior to releasing it to the employee. Once the evaluation is released you will need to schedule a meeting with the employee to discuss the evaluation. The evaluation process is due to be completed no later than <date>.

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 EvalS, 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 30 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.**

Note: Be sure to emphasize how the results relate to the progress the employee has made regarding the associated goal. 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**.

You will not be able to view the **Employee Results** until the employee **SUBMITS** their results and the status of the evaluation goes to **Appraisal Due**.

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

Purpose: To assist supervisors of professional faculty to enter the results, complete the appraisal summary, and select a rating for the employee.

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 goals were completed. That is, the approach utilized 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 the following choices:

- Exceptional Performance – Consistently operates well above expectations
- Strong Performance – Meets and often exceeds expectations of the position
- Satisfactory – 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

The screenshot shows a web form titled "Appraisal Summary". It contains a text area for "Overall Evaluation" and a radio button selection for "Select a rating". At the bottom, there are two buttons: "Save Draft" and "Submit Appraisal".

Appraisal Summary

Overall Evaluation

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

Save Draft Submit Appraisal

When the supervisor has completed entering their results, finalized the appraisal summary, and selected a rating the evaluation is ready to be **SUBMITTED FOR EMPLOYEE REVIEW**.

NOTE: Supervisors should make sure they download a PDF copy of the evaluation PRIOR TO SUBMITTING THE EVALUATION FOR EMPLOYEE REVIEW, and retain a copy of the evaluation at this stage for their file.

When you have completed the content, and printed a copy, you will then select **SUBMIT FOR EMPLOYEE REVIEW** in EvalS.

EMPLOYEE REVIEW

Purpose: To assist the supervisor of professional faculty employees in releasing the evaluation to the employee, receive the employee feedback, and conduct the evaluation review meeting.

When the supervisor submits the evaluation for EMPLOYEE REVIEW, the employee will receive a message indicating that their evaluation is available for their review. The employee has 15 days to review the entire evaluation and reply to the supervisor with any feedback. Perhaps they will suggest corrections, or may remind the supervisor that some significant accomplishment has not been noted.

The screenshot shows a web interface for an appraisal. At the top, there is a tab labeled "Appraisal Summary". Below this, there is a section titled "Evaluation" containing the text "Overall a very good year". Underneath is a section titled "Select a rating" with six radio button options: "Exceptional Performance - Consistently operates well above expectations", "Strong Performance - Fully meets and often exceeds expectations of the position" (which is selected), "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", and "No basis for evaluation / Not rated". Below the rating section is a section titled "Employee Review" with a sub-section "Employee Comments" and a large empty text area with a vertical scrollbar. At the bottom of the interface are two buttons: "Save Draft" and "Submit Review".

EVALUATION RELEASE DUE

When the employee has submitted their feedback you will receive the following message:

Subject: Action Required: Release Performance Evaluation for Employee Signature

Your employee <name> has submitted the EvalS employee review for the position <position name> for the <Review Period> review period. Please make any final changes, confirm the rating, and Release the Evaluation to the employee for signature in the EvalS system. If you haven't done so, please schedule a meeting with your employee to discuss the evaluation before releasing it for signature. The evaluation process is due to be completed no later than <date>.

Use the following link to access the EvalS System

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

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 review any feedback provided by the employee concerning the evaluation period.

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

Once all corrections, changes, and edits have been made, the evaluation is ready to be **RELEASED** to the employee for their signature.

NOTE: Be especially careful that all changes have been completed before release. Once the evaluation is released, no further changes can be made.

EVALUATION CONFERENCE, RELEASE and SIGNATURES

Purpose: To assist the supervisor of professional faculty employees to complete the evaluation process.

Only after the meeting with the employee, completing any necessary edits, and clicking the signature box certifying that the evaluation is complete and has been reviewed with the employee will you go into EvalS and **RELEASE the evaluation to the employee.**

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

Supervisor Signature

I have reviewed the contents of this evaluation with the employee and approve its completion and release to the employee for signature.

▲ Employee Review

Save Draft **Sign and Release to Employee**

The employee will receive an email indicating that their evaluation has been “released” and their signature is due. Employees have no ability in EvalS to alter or edit the evaluation contents after released.

Signatures and Employee Comments

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 employee comments if they choose to.

Signing

The employee will click on 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 the evaluation.”**

Employee Comments in EvalS

At the same time the employee electronically “signs” the evaluation in EvalS; they have the opportunity to submit written comments in the EvalS system.

If employee comments are 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 comments, click on the **Review employee comments** box. **E Mail**

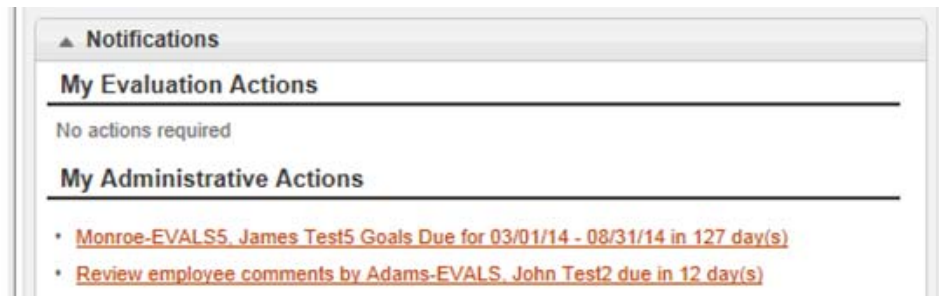
Subject: Action Required: Performance comments from employee

Your employee, <Employee Name>, with university ID <ID#>, has submitted a comment to the performance appraisal for the position <position name> for the <review period dates> review period.

Please view the comment and indicate you have done so by <date>. 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>



▲ Notifications

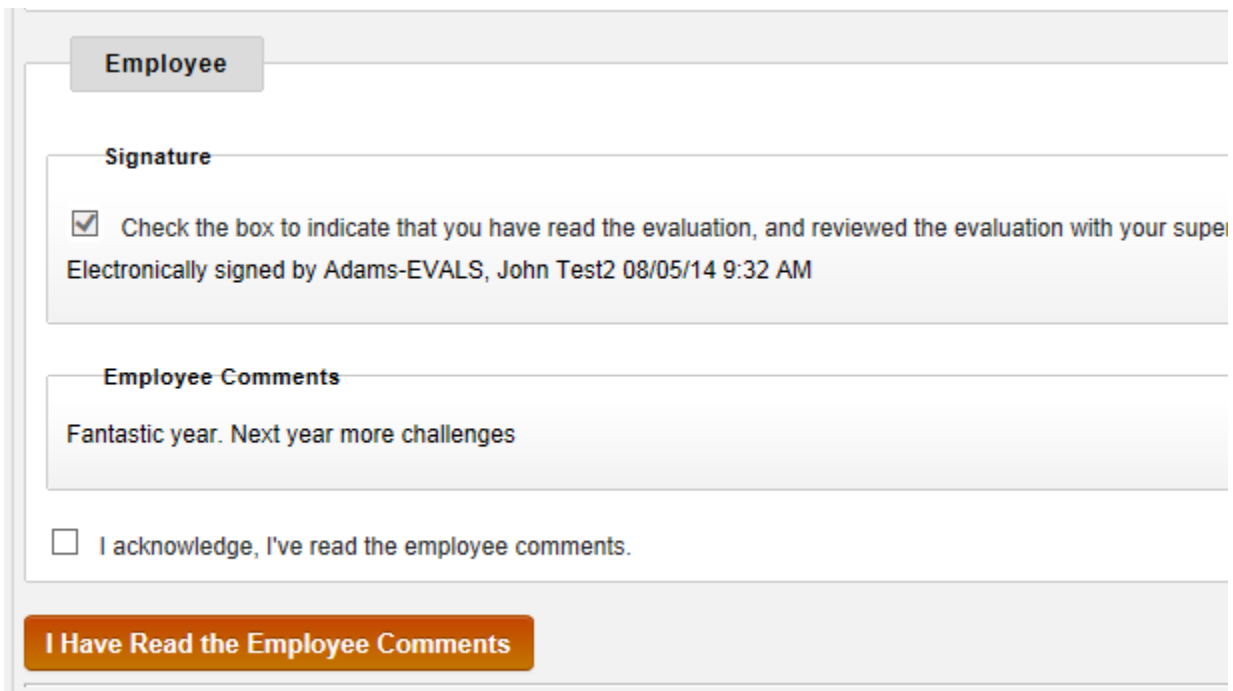
My Evaluation Actions

No actions required

My Administrative Actions

- [Monroe-EVALS5, James Test5 Goals Due for 03/01/14 - 08/31/14 in 127 day\(s\)](#)
- [Review employee comments by Adams-EVALS, John Test2 due in 12 day\(s\)](#)

Click on the box next to the statement, "I acknowledge, I have read the employee comments" and select the option, "I have read the employee comments".



Employee

Signature

Check the box to indicate that you have read the evaluation, and reviewed the evaluation with your supervisor.
Electronically signed by Adams-EVALS, John Test2 08/05/14 9:32 AM

Employee Comments

Fantastic year. Next year more challenges

I acknowledge, I've read the employee comments.

I Have Read the Employee Comments

The signature and any employee comments 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 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.

AUTOMATIC REMINDERS

The supervisor will receive a message 60 days and 30 days before the signature due date.

E Mail to manager

Subject: Performance Evaluation Completion Due Soon

It has been 30/60 days since the end of the performance evaluation period for <Name>, <Position name>. The evaluation review period was <Date> to <Date>. The tasks to complete in the EvalS system include: the employee submitting his/her performance results, you entering the supervisor performance results, finishing the appraisal summary, proposing a rating for the employee, releasing the evaluation for employee review, meeting with the employee, finalizing any changes, and releasing the final evaluation to the employee for signature.

CLOSING A PERFORMANCE EVALUATION DUE TO AN UNEXPECTED CHANGE

Under the following circumstances a supervisor should contact an EvalS Administrator to CLOSE the evaluation prior to 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 the final evaluation due date you should print out a copy of the evaluation and have two managers sign the document noting that the employee declined to sign.

NOTE: It is important for supervisors to retain a hard copy of the completed evaluation in their department files.

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	

