EvalS Performance Evaluation Management System

HR REVIEWER USER’S GUIDE

For Classified (Non-IT) Employees
HR Reviewer Users Guide to EvalS – DRAFT

Review

Purpose: To assist Business Center Human Resource reviewers of classified employee’s performance evaluations in the EvalS system.

Overview –

Once the supervisor has consolidated the results, completed the appraisal section, and determined a performance rating for an employee, a designated member of the Business Center HR department will review the evaluation based on established criteria. The reviewer may make suggestions to the supervisor to modify the performance evaluation.

When –

The HR reviewer will receive an email message that there is an Appraisal awaiting a review. Or you may also check the Notifications/My Administrative Actions section of your EvalS Home Page. Be sure you have selected the Reviewer Role. It is expected that the HR Review Process should be completed within 15 days, or within 15 days of the end of the evaluation period whichever comes first.

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When you have evaluations requiring review you will receive an email letting you know. Click on the link provided in the email message. This will bring you to the log on for your My OSU home page. Use your ONID user name and password and you will see your My OSU home page. Click on the Employee Tab. On the right hand side of the page you will see the EvalS section. Look for the tab titled ROLES. Click on ROLES, and select Reviewer

Look at the EvalS section labeled Notifications

The Notifications Section – Will have messages in the My Administrative Actions area about upcoming tasks (i.e. You have 1 appraisals to review).
If it indicates that evaluations need to be reviewed, CLICK on that message and EvalS will take you to an Appraisals Pending Review screen. This page will display the list of appraisals that are pending your review. By clicking on Review Due, EvalS will open the evaluation for your review.

If questions or concerns arise regarding the content of a performance evaluation, it is recommended that the reviewer contact the supervisor to have a conversation and determine if appropriate changes are necessary.

When you have completed your review you can enter feedback in the HR Comments Text Box.
Refer to the supplemental materials available at the Evals web site to assist in your review.

http://oregonstate.edu/admin/hr/performance-evaluation/

RATINGS

The “No Rating” option in EvalS is reserved for non-IT classified employees and for particularly unusual situations and supervisors should consult with Human Resources prior to making this selection. Primarily, the “No Rating” selection is utilized when there has been a significant disruption in the evaluation cycle. There may be a change in reporting structure, a substantial in job responsibilities, or the performance evaluation process may have broken down and needs to be re-established.

An evaluation for an IT Classified employee will not have a “No Rating” option available

IT SALARY ADMINISTRATION

The Salary Recommendation Section is the place in the evaluation the supervisor indicates the appropriate base pay recommendation that corresponds to the IT classified employee’s performance rating.

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.

The HR Reviewer should double check that the entries in this area are correct and that the recommendation does not exceed the appropriate percentage or the upper and lower limits of the salary available for that particular employee.

**HR COMMENTS**

*Note:* The HR Comments text box is limited to 3,000 characters.

*Note:* Only the supervisor will have visibility to your reviewer comments.

Once any comments are entered you may select

**SAVE DRAFT**

Or

**SUBMIT REVIEW**
Submitting the review will trigger an email to the supervisor that your review is complete and the evaluation is available to be released to the employee. The supervisor has the option to make any appropriate edits in the supervisor results, appraisal summary or performance rating prior to releasing the evaluation to the employee.

**NOTE:** If more extensive dialogue with the supervisor is warranted prior to the evaluation being released to the employee **DO NOT SUBMIT REVIEW** until all issues have been resolved.

**REBUTTALS**

**Overview –**

At the same time an employee electronically “signs” the evaluation in EvalS; they have the opportunity to submit a written rebuttal in the EvalS system. If they wish for the rebuttal to be in the EvalS system, they must submit 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 to the Business Center Human Resources Department within 60 days. It will then become a part of the employee’s personnel file.

If an employee decides to include a rebuttal at the time they sign the evaluation, EvalS will alert the HR Reviewer with an email indicating that a rebuttal has been submitted. This is simply for the HR Reviewer’s information. No action is required. However, you will have the ability to view the rebuttal if you choose to.

The supervisor will have received a similar message and will need to read the rebuttal and indicate that they have done so in EvalS.

**NOTE:** THERE IS NO NEED TO SCAN IN A COPY OF THE COMPLETED EVALUATION INTO NOLIJ. THAT WILL OCCUR AUTOMATICALLY

**CLOSING AN EVALUATION**

Under certain circumstances (see below), either the HR Reviewer, or one of the EvalS Administrators may need to CLOSE an evaluation in EvalS. This procedure will “reset” EvalS to ensure that due dates and messages will be appropriate.

Reasons for Closing an Evaluation:
- Employee refuses to sign appraisal (print hard copy, have 2 managers sign, and scan into NOLIJ)
- Job termination (left position, promoted, retired, voluntary or involuntary)
- Layoff
- Performance Evaluation completed on paper for IT classified employees (only through December 2013)
- Position on long-term leave (not summer job on leave)

How to Close a performance evaluation record in EvalS

1. Log into EvalS
2. Enter the 9-digit Employee ID of the record you wish to close:
3. Open the record you wish to close:

4. Click on Close Out Evaluation:
5. Select the appropriate reason for closing:
6. Click “Close”

FINDING AN EVALUATION

From the EvalS section of the OSU Portal – in the HR Reviewer Role, find the section labeled **Search**

Enter the employee 9 digit OSU id

![EvalS screen capture]

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