

# Evaluator – Supervisor Functions

## HSC Annual Performance Evaluation Quick Reference Guide

### PERFORMANCE EVALUATION PERIOD AND DEADLINES

2013 Evaluation Period June 3 – September 30

HSC Institutional Evaluation Deadline September 30

\* Departments may set optional deadlines for completion prior to the 9/30 institutional deadline.



#### Who should receive an annual staff performance evaluation?

- ▶ Any benefits eligible staff member (.5 FTE and above), who began employment on or before March 1, 2013.

### HOW TO LOG IN TO THE EVALUATION CENTER

1	Go to the <a href="#">HSC Intranet Home Page</a>
2	Select the Learning Solutions link under the Benefits/EIS heading in the left column.
3	Log into EIS using your EUID and password.
4	Select UNTS HSC Staff Evaluations from the menu on the left.
5	Select the Employee – Evaluation Center option in the upper left corner.
6	Access your direct reports evaluations on the Evaluator – Annual Evaluations tab.

Verify that you have both “Evaluator – Annual Evaluations” and “Staff Evaluation Self Service” tabs.

For questions or assistance contact the HSC Campus HR team:

Email: [HRS.HumanResourcesOffice@untsystem.edu](mailto:HRS.HumanResourcesOffice@untsystem.edu)

817.735.2690

### Supervisor’s Role

#### Step 1: Preparation

- ▶ Collaborate with employee(s) to establish performance goals and objectives that will be reviewed on the self and final evaluations.
- ▶ Set a deadline for completion of the self-evaluation.
- ▶ Schedule a review meeting with each direct report to discuss their evaluations.

#### Step 2: Writing the Final Evaluation

- ▶ Review the employee’s self-evaluation.
- ▶ Complete the online Final Evaluation form in the EIS Annual Staff Evaluation system for all direct reports.
- ▶ Print copies of the Final and Self-Evaluations to use at the Review Meeting.

#### Step 3: Review Meeting

- ▶ Discuss the employee’s performance; including goals, expectations and objectives for next year.
- ▶ Communicate examples of successful or unsuccessful behaviors, actions and performance.
- ▶ Develop a training or professional development plan (as appropriate).

#### Step 4: Post-Review Meeting

- ▶ Revise evaluation content as needed, based upon review meeting discussions.
- ▶ Document in Supervisor’s Post-Review comments, any disagreements or necessary comments.
- ▶ Enter the Review Meeting Date under the Meeting/Signature tab.
- ▶ Sign the Final Evaluation for all direct reports (once the employee has signed) and “Close for Department Head Signature.”

## HOW TO ACCESS FINAL EVALUATIONS FOR YOUR DIRECT REPORTS

- 1 Log into the Evaluation System and go to the Employee – Evaluation Center.
- 2 Under the Evaluator tab select the Final Evaluation link for either Supervisory or Non-Supervisory, depending on the classification of your direct reports.
- 3 This will bring up a SEARCH screen. Do not populate the fields, simply click SEARCH.
- 4 If you have only one direct report, the employee's Final Evaluation will open. If you have more than one direct report, a list of employees will appear, select the desired employee's evaluation.
- 5 Click the SAVE button to save your work and continue later.
- 6 Click the COMPLETE button when all data is entered and you are ready to "complete" and move to the Review Meeting step.

The Final Evaluation is available for the employee to review once the COMPLETE button is successfully clicked and grayed out. However, you can still update content and use the SAVE option to make changes as needed.

## HOW TO VIEW AN EMPLOYEE'S SELF-EVALUATION

- 1 Open the Final Evaluation for the desired employee using the steps above.
- 2 Under the evaluation heading (at the top of the screen), click on the "View Employee Self-Evaluation" link in blue near the bottom left of the heading.

The Self-Evaluation will open in a new window. It may take several minutes for this window to populate.

## TO PRINT A SELF-EVALUATION

- 1 Open the Self-Evaluation.
- 2 Click the "Print Employee Self -Evaluation" link in blue at the top of the screen.

This generates a PDF file of the Final Evaluation in a new window. Save the PDF or print as needed.

## HOW TO VIEW AN EMPLOYEE'S EVALUATION HISTORY

- 1 Open the Final Evaluation for the desired employee (using the steps above).
- 2 Under the evaluation heading (at the top of the screen), click on the "View Final Evaluation History" link in blue near the middle of the heading.

The evaluation history will open in a new window. It can take up to 10 minutes for this window to populate depending on the number of prior evaluations in the system for the selected employee.

## HOW TO ENTER THE REVIEW MEETING DATE

The Review Meeting Date activates the Employee Signature field. The employee cannot sign until this date is entered.

- 1 Open the employee's Final Evaluation.
- 2 Navigate to the "Evaluation Meeting & Signature" tab.
- 3 In the first entry field, select "YES" and enter the Performance Review Meeting Date.
- 4 Click the SAVE button at the bottom of the page.

The employee will receive an email asking them to sign their evaluation.

## HOW TO SIGN AN EVALUATION AS A SUPERVISOR

An employee must sign their Final Evaluation before the Supervisor Signature field becomes active. When an employee signs, the evaluation is "locked" and only the signature process is available. No evaluation content may be changed.

- 1 Open the employee's Final Evaluation.
- 2 Navigate to the "Evaluation Meeting & Signature" tab.
- 3 Scroll to the Supervisor's Signature field.
- 4 Select "YES" and enter the date in the date field.
- 5 Click the CLOSE/READY FOR DEPT HEAD SIGNATURE button.

A message will pop-up indicating the evaluation has been successfully signed.

## HOW TO PRINT A FINAL EVALUATION

- 1 Open the Final Evaluation for the desired employee.
- 2 Under the evaluation heading (at the top of the screen), click on the "Print Final Evaluation" link in blue near the middle of the heading.

This generates a PDF file of the Final Evaluation in a new window. Save the PDF or print as needed.