

# Setup Checklist (Staff Evaluations)

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**Staff Evaluations will no longer be available after June 30th, 2025. For more information, visit the [Human Resources and Staff Evaluation Deprecation FAQ](#).**

Before you can start using the Staff Evaluations module, you must complete the setup tasks listed on this page.

Step	Description
1	<p><b>Enable File Upload</b> (Optional)</p> <ul style="list-style-type: none"> <li><a href="#">Enable the Staff Evaluations Service in the Digital Repository</a> - Enabling this service allows you to enable and disable the document upload feature in the Staff Evaluations module. After the service is turned on, administrators can select the option to allow uploading files on <a href="#">evaluation templates</a>.</li> <li><a href="#">Define Upload Types</a> - The Custom Attribute Dictionary or HR Codes can be set up for the types of files that users may upload to an evaluation.</li> </ul>
2	<p><b>Define Evaluation Periods</b></p> <p>Evaluation Periods specify the period of time during which staff evaluations may be performed.</p>
3	<p><b>Configure Rating Scales</b></p> <p>Rating scales are used to measure the level of an employee's performance.</p>
4	<p><b>Add Categories to the Category Bank</b></p> <p>The Category Bank contains the areas of responsibility for which employees are being evaluated. Categories can include Elements, Sub-Elements and Rating Scale definitions which allow you to divide a Category into specific features that can be rated.</p>
5	<p><b>Create Evaluation Templates</b></p> <p>Evaluation Templates provide the format from which staff evaluations are created. Once Evaluation Templates are created, you can <a href="#">Generate Evaluations for Supervisors to Use</a> and supervisors can <a href="#">Generate New Evaluations for Employees</a> for their direct reports.</p>