

# **Generate New Evaluations for Employees**

Tool Search: Supervisor

As a supervisor, you can generate evaluations for your direct reports.

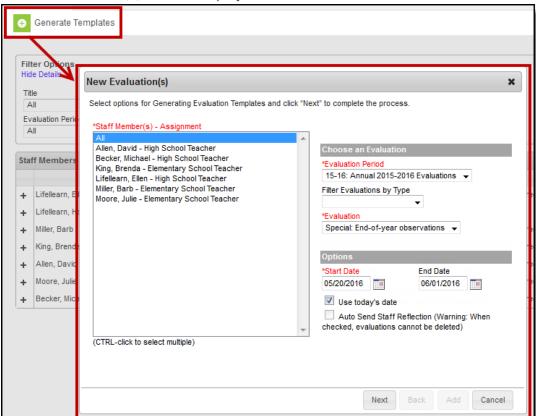
Before you can generate evaluations, Evaluation Templates must already be set up. See the article Evaluation Templates for more information.

Complete the following steps to generate evaluations for your direct reports.

1. Click the **Generate Templates** button.

#### Result

The New Evaluation(s) window displays.



- 2. Select the **Staff Member(s)** for whom you want to create an evaluation.
- 3. Select the Evaluation Period.

If there are multiple evaluation templates in the Evaluation Period, you can filter the evaluation templates by selecting *Annual, Interim* or *Observation* in the **Filter** 



## **Evaluations by Type** dropdown list.

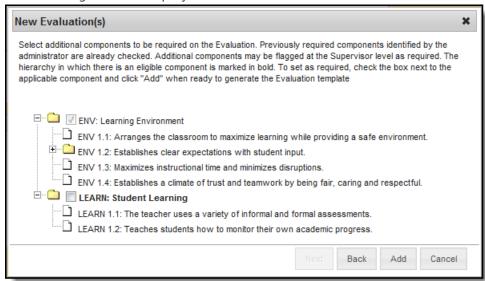
- 4. Select the **Evaluation** you want to generate.
- 5. Enter a **Start Date** or select the **Use today's date** checkbox to automatically insert the current date.
- 6. Update the **End Date** as necessary. (optional)
- 7. Select the **Auto Send Staff Reflection** checkbox to immediately send the evaluation to your direct report(s). (optional)

If you select this option, you cannot delete the evaluation.

8. Click the Next button.

#### Result

The following window displays.



9. Mark the checkboxes next to the component(s) for which you require a rating. (optional)

Checkboxes cannot be selected if all categories are already required or if the Category is marked as "Observation Only."

10. Click the Add button.

## **Result**

A confirmation message displays.

11. Click **OK**.

