Generate New Evaluations for Employees

Last Modified on 10/21/2024 8:20 am CDT

Tool Search: Supervisor

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

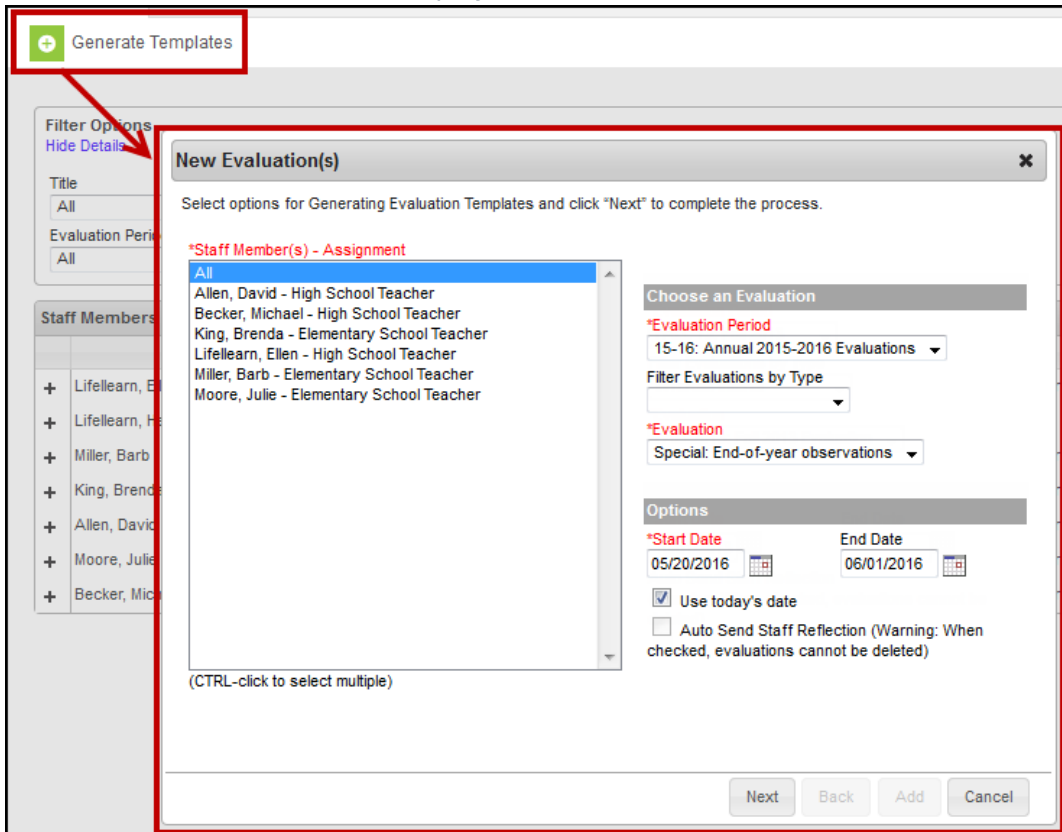Before you can generate evaluations, Evaluation Templates must already be set up. See the article Evaluation Templates for more information.

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.

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.
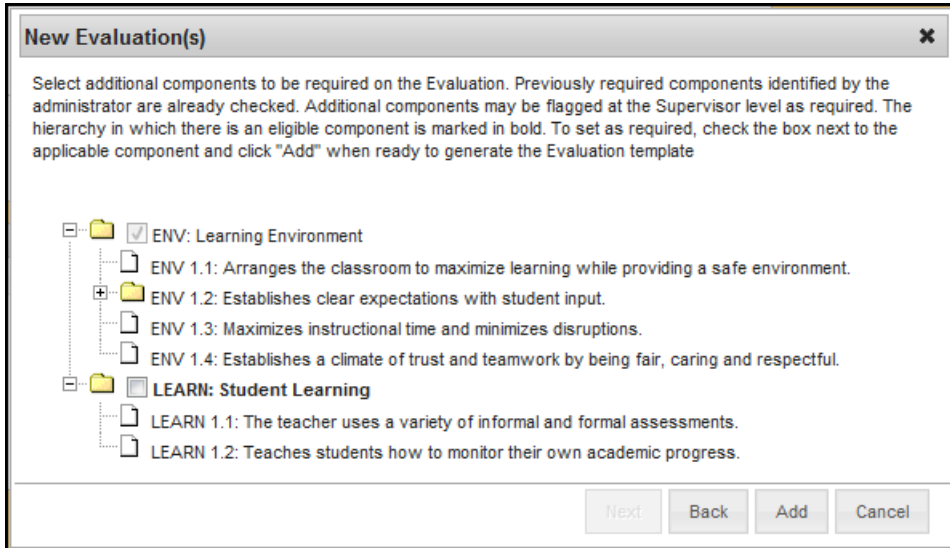
4. Select the **Evaluation** you want to generate.
5. Enter a **Start Date** or select the **Use today's date** checkbox to automatically insert the current date.
6. Update the **End Date** as necessary. (*optional*)

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.

New Evaluation(s)

Select additional components to be required on the Evaluation. Previously required components identified by the administrator are already checked. Additional components may be flagged at the Supervisor level as required. The hierarchy in which there is an eligible component is marked in bold. To set as required, check the box next to the applicable component and click "Add" when ready to generate the Evaluation template

☑ ENV: Learning Environment
  ENV 1.1: Arranges the classroom to maximize learning while providing a safe environment.
  ⊞ ENV 1.2: Establishes clear expectations with student input.
  ENV 1.3: Maximizes instructional time and minimizes disruptions.
  ENV 1.4: Establishes a climate of trust and teamwork by being fair, caring and respectful.
☐ LEARN: Student Learning
  LEARN 1.1: The teacher uses a variety of informal and formal assessments.
  LEARN 1.2: Teaches students how to monitor their own academic progress.

Next   Back   Add   Cancel

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**.