

Generate New Evaluations for Employees

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Tool Search: Supervisor

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

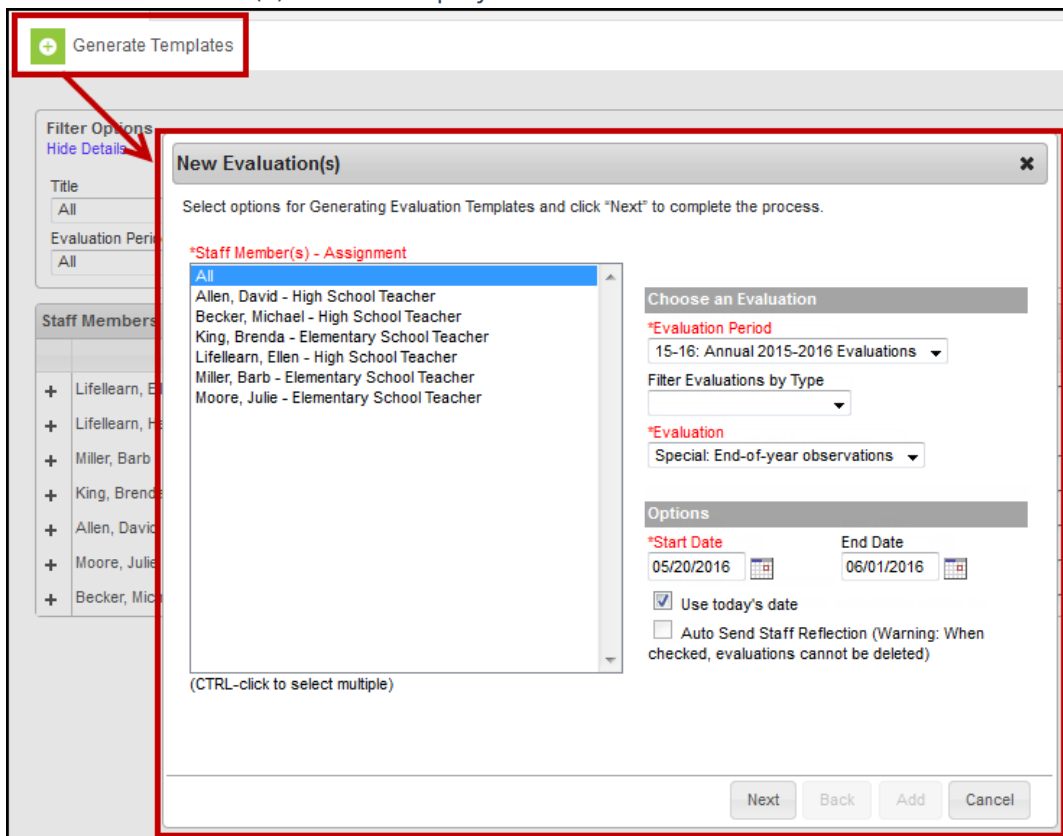
Before you can generate evaluations, Evaluation Templates must already be set up. See the article [Evaluation Templates](#) for more information.

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.

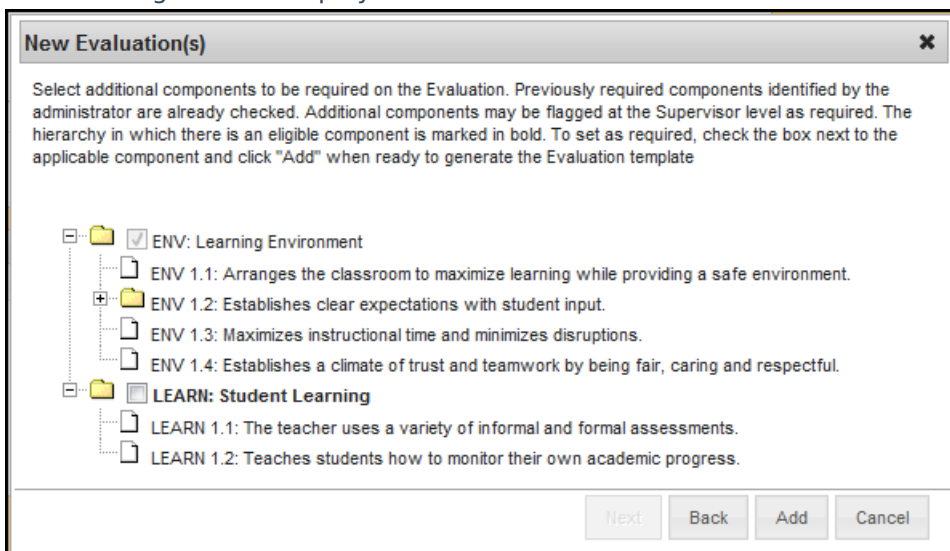
4. Select the **Evaluation** you want to generate.
5. Enter a **Start Date** or select the **Use today's date** checkbox to automatically insert the current date.
6. Update the **End Date** as necessary. (*optional*)
7. Select the **Auto Send Staff Reflection** checkbox to immediately send the evaluation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

