Generate Evaluations for Supervisors to Use

Last Modified on 10/21/2024 8:22 am CDT

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

Tool Search: Evaluation Inquiry

As an administrator, you can generate evaluations for supervisor's 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 supervisor's 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.
   Result
   The default **Start Date** from the Evaluation displays.

5. Update the **Start Date** and **End Date** as necessary. (*optional*)

> Mark the **Use today's date** checkbox to automatically insert the current date in the **Start Date** field.
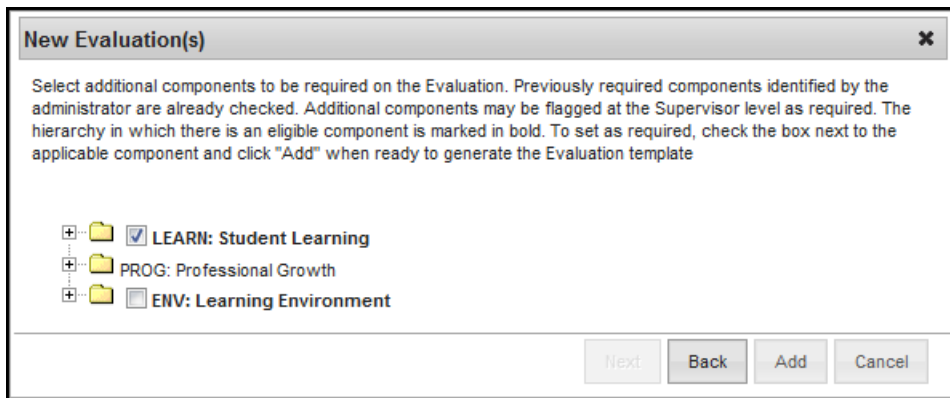
6. Enter a **Message to Supervisors**. (*optional*)

   ▸ Click here to expand...
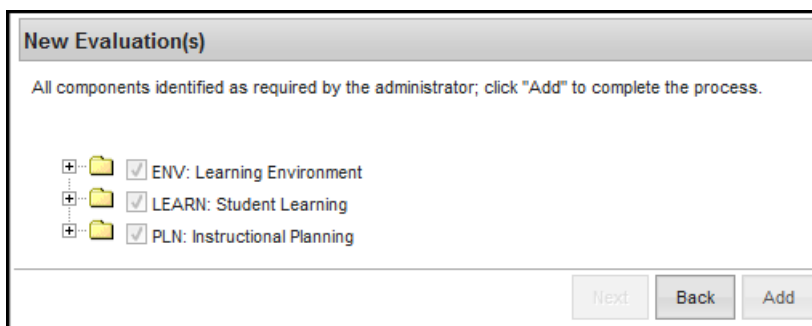   The message you enter displays when the supervisor hovers over the alert in their Process Inbox.
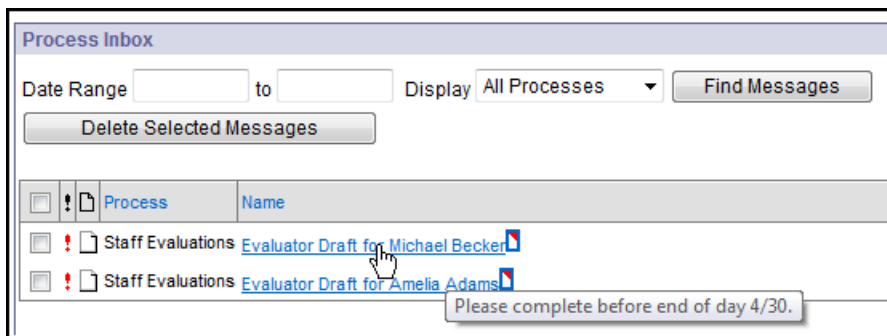
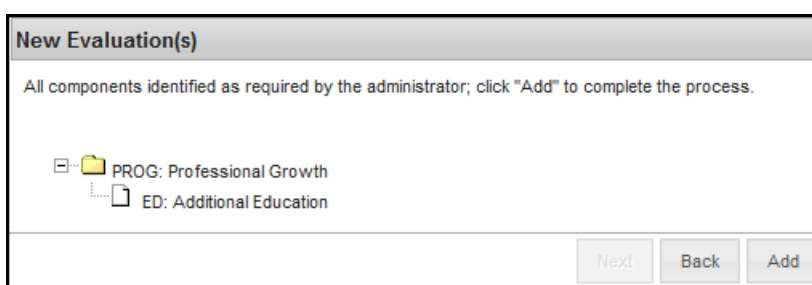7. Click **Next**.
   Result
   The following window displays.

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

▶ Click here to expand...
If all categories are already required, all checkboxes are disabled.

A checkbox does not display if the Category is marked as "Observation Only."

9. Click the **Add** button.
Result
A confirmation message displays.

10. Click **OK**.