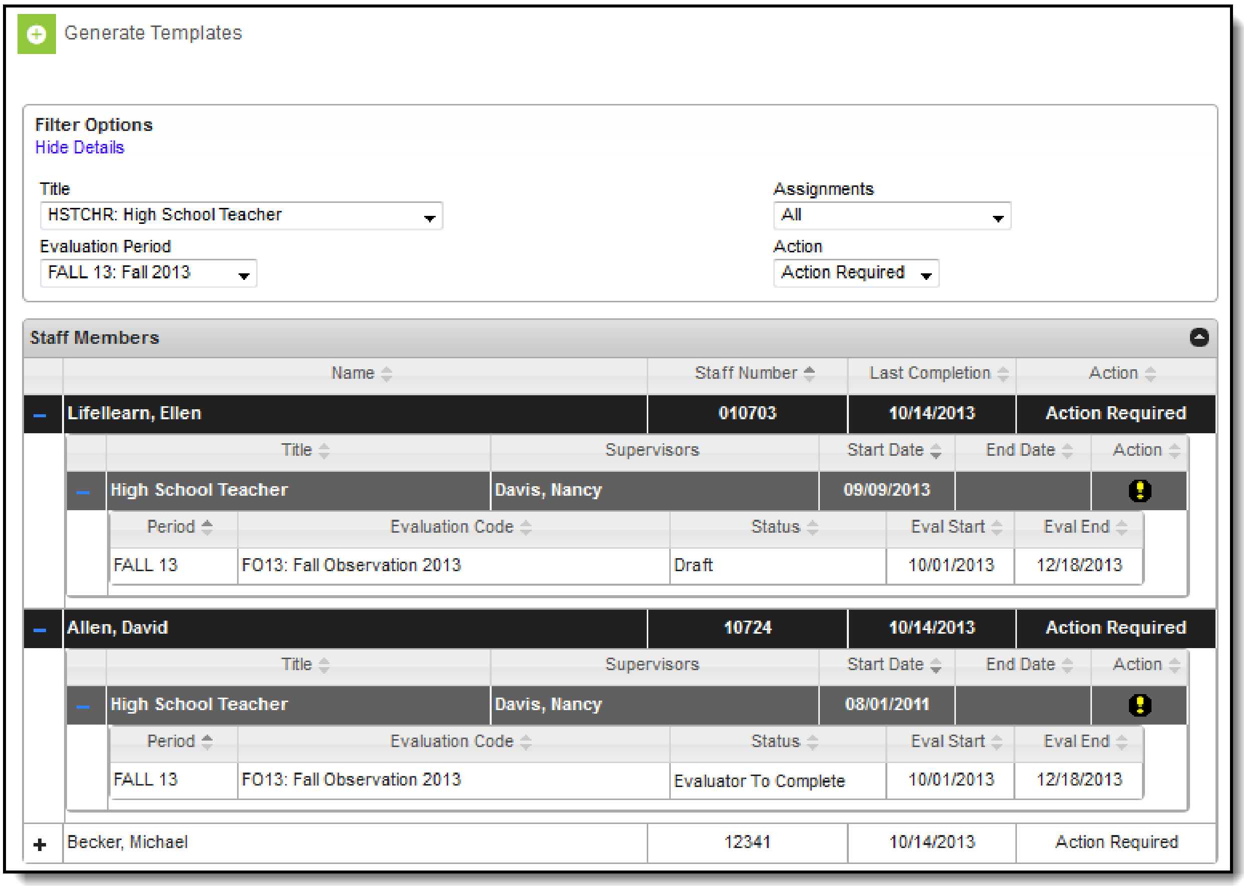
Review and Complete an Employee Evaluation

Last Modified on 03/11/2024 8:45 am CDT

PATH: *Staff Evaluations > Supervisor*

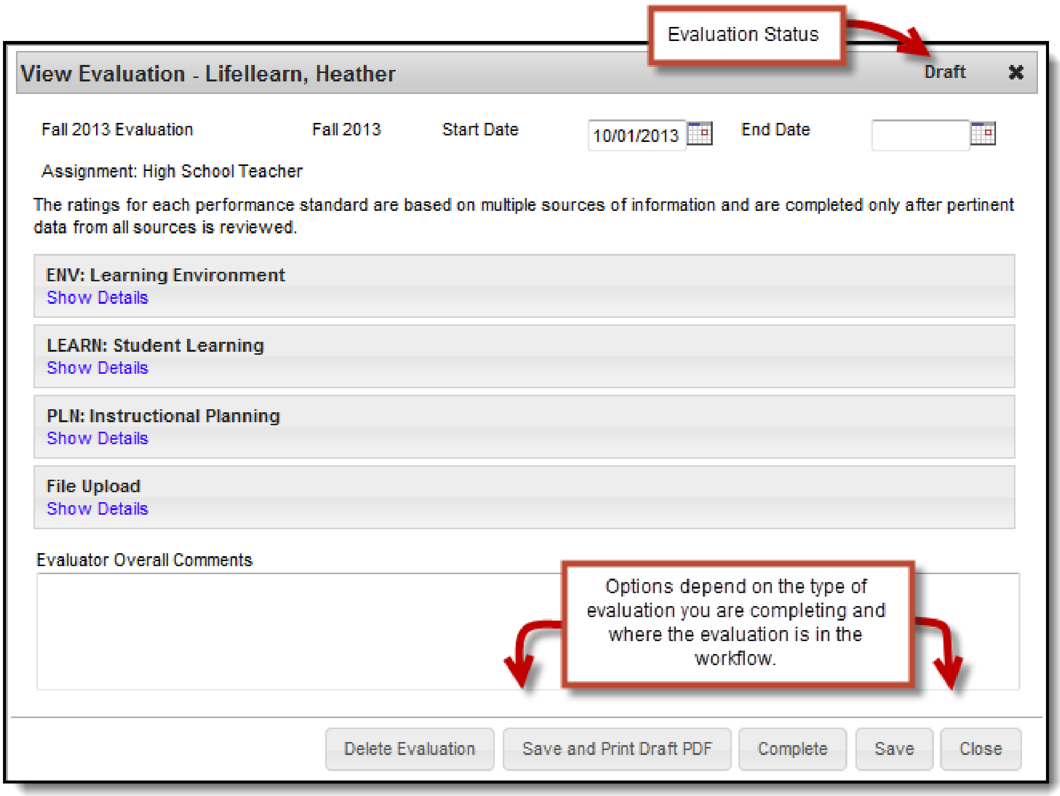
PATH: *Supervisor Self Service > Staff Evaluations (HR-enabled)*

Use the Filter Options on the Supervisor tab to find the evaluations that you need to complete.

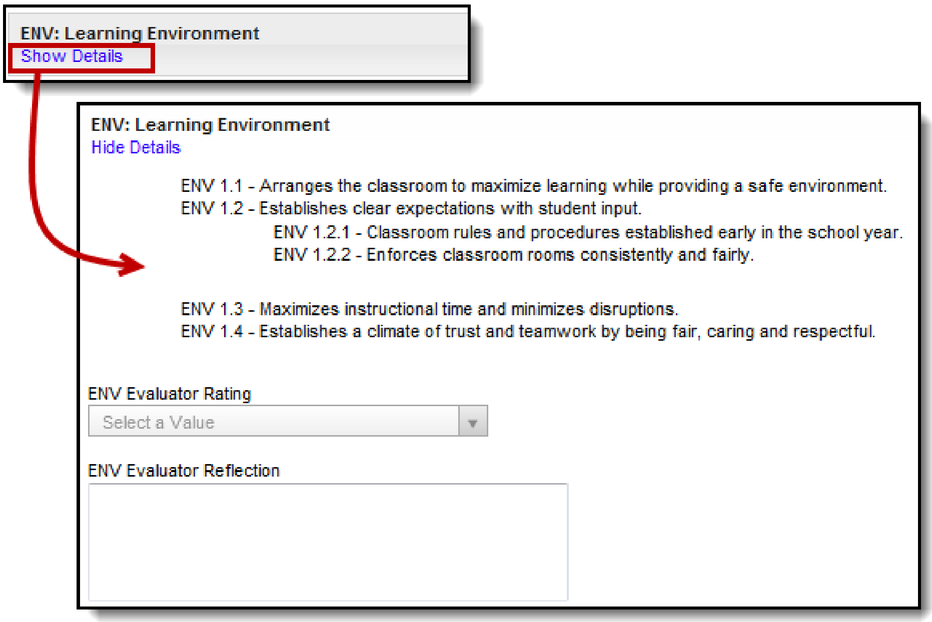


Use the following steps to complete an evaluation.

1. Use the following **Filter Options** to find the evaluations that you need to complete. (*optional*)
    - **Title**. Select an option to filter employees by the specific title on their District Assignment or Work Assignment.
    - **Evaluation Period**
    - **Assignments**. Select *Active Assignments* or *Ended Assignments*.
    - **Action**. Select *Action Required* to display evaluations that require your attention.
2. Click the plus (+) next to the employee and then their title.
3. Click the row for the evaluation you want to complete.
   Result
   The View Evaluation window displays.

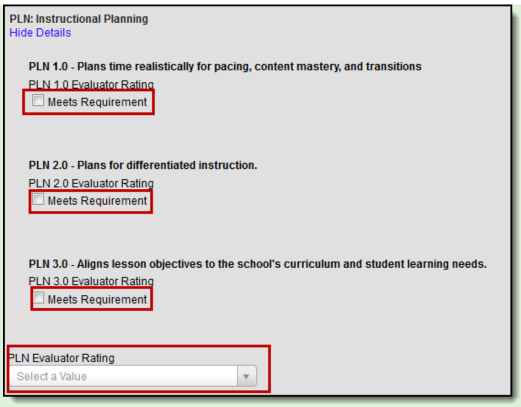


4. Click the **Show Details** link to display details for the Category.



5. Select an Evaluator Rating or mark the **Meets Requirement** checkbox for the Category, Element and/or Sub-Element.

> In the following example, each Element includes a checkbox and the rating scale is used at the Category level. Depending on how the evaluation is set up, a checkbox or rating scale may be used at any level.



6. Enter comments in the **Evaluator Evidence** and/or **Reflection** boxes.

7. Add supporting documents to the evaluation. (*optional*)

    ▸ Click here to expand...

8. Enter comments in the **Evaluator Overall Comments**. (*optional*)

9. Complete one of the following options.

    Not all options will be available. Options are determined by the Evaluation Workflow.

Option	Description
Save	Clicking the **Save** button allows you to save the evaluation in its current state and return to it later. After clicking Save, the window will stay open.
Save and Send to Employee	Clicking the **Save and Send to Employee** button saves the evaluation, puts the evaluation on the employee's My Evaluations tab for reflection and places a notification in the employee's Process Alerts.
Save and Print Draft PDF	Clicking the **Save and Print Draft PDF** saves the evaluation and generates a PDF of the evaluation that you can print.
Save and Send for Staff Acknowledgement	This button appears after the employee has entered their reflection and has sent the evaluation back to you for further review. Clicking the **Save and Send for Staff Acknowledgement** button sends the evaluation back to the employee for a final acknowledgement.
Complete	Clicking the **Complete** button marks the evaluation as complete. After clicking this button, no further changes can be made to the evaluation.

Option	Description
Close	Clicking the **Close** button closes the View Evaluation window. If there are unsaved changes, a confirmation message will display.