Annual Evaluation Process

The diagram below describes the steps for creating and completing the ETSU annual evaluation in eVals. [Note: Both the employee and second-level supervisor have the option to return the evaluation back to the supervisor with comments.]

**Step 1:** Supervisor initiates the performance review plan

**Step 2:** Employee acknowledges the evaluation plan

**Step 3:** Supervisor completes the evaluation

**Step 4:** Employee acknowledges the evaluation

**Step 5:** Second-level supervisor approves the evaluation

**Step 6:** HR reviews and marks the evaluation complete
Step Instructions

**Step 1: Supervisor activates the performance review plan**

**Supervisor:** You will receive an email to create the Annual Evaluation Plan and the task will be added to your Action Items.

1. Click on the link in your email or go to jobs.etsu.edu/portal.
2. Log in with your ETSU username (e.g. smithj) and password.
3. Click on the Home tab.
4. From your Action Items, select **Step 1: Activate the Employee’s Performance Review Plan** next to the employee’s name.
5. The General Objectives and Position Objectives are automatically added to the plan. You can optionally add additional goals on the Performance Goals tab.
6. From the Performance Goals tab or from the **Actions** button, select **Complete**.

The plan is now active and will appear in the employee’s Reviews list. Both the supervisor and the employee can now add notes and documents to this review (see Progress Notes).

**Step 2: Employee acknowledges the evaluation plan**

**Employee:** The evaluation plan defines objectives and goals you will be evaluated on for your annual evaluation. You will receive an email when your evaluation plan is available to acknowledge.

1. Click on the link in your email or go to jobs.etsu.edu/portal.
2. Log in with your ETSU username (e.g. smithj) and password.
3. Click on the Home tab.
4. From your Action Items, select **Step 2: Review and Acknowledge your Performance Review Plan**.
5. At the bottom of the screen, select **Acknowledge**.

The plan is now active and will appear in your Reviews list. You can now add notes and documents to this review (see Progress Notes).

**Step 3: Supervisor completes the evaluation**

**Supervisor:** This step may be completed starting the last month of the evaluation period (March 1). You will receive an email when the evaluation is available to complete.

1. Click on the link in your email or go to jobs.etsu.edu/portal.
2. Log in with your ETSU username (e.g. smithj) and password.
3. Click on the Home tab.
4. From your Action Items, select **Step 3: Complete the Employee’s Evaluation** next to the employee’s name.
5. Complete each tab in the evaluation.
6. From the Performance Summary tab or from the **Actions** button, select **Complete**.

From **Actions** you can also print a copy of the evaluation to review with the employee.
Step 4: Employee acknowledges the evaluation

Employee: You will receive an email when your evaluation is available to acknowledge.

1. Click on the link in your email or go to [jobs.etsu.edu/portal](http://jobs.etsu.edu/portal).
2. Log in with your ETSU username (e.g. smithj) and password.
3. Click on the Home tab.
4. From your Action Items, select **Step 4: Review and Acknowledge your Completed Evaluation**.
5. At the bottom of the screen, add a comment if desired.
6. Select either **Return to Supervisor** if you want your supervisor to review your comments before you acknowledge the evaluation or **Acknowledge** to submit the evaluation to your second level supervisor for approval.

Step 5: Second-level supervisor acknowledges the evaluation

Second level supervisor: You will receive an email when an evaluation is available to acknowledge.

1. Click on the link in your email or go to [jobs.etsu.edu/portal](http://jobs.etsu.edu/portal).
2. Log in with your ETSU username (e.g. smithj) and password.
3. Click on the Home button.
4. From your Action Items, select **Step 5: Acknowledge the Evaluation as Second-level Supervisor** next to the employee’s name.
5. At the bottom of the screen, add a comment if desired.
6. Select either **Return to Supervisor** if you need the supervisor to review your comments and make changes or **Acknowledge** to submit the evaluation to Human Resources. If you submit the evaluation back to the supervisor, it will go back to the employee to review and acknowledge any comments or changes then return to you to acknowledge.

Step 6: Human Resources reviews and marks the evaluation complete

Human Resources will review the evaluation and either mark it complete or return it to the supervisor for review.

Progress Notes

For each performance evaluation plan, both the employee and supervisor can add progress notes starting the first day the plan is open. Employees may use Notes to record project completions, training or other milestones. Employee notes are NOT available for the supervisor to view. Supervisors may use Notes to track employee progress or other content. Supervisor notes are NOT available for the employee to view.

To add notes or attachments to an evaluation (yours or your employee’s),

1. Select My Reviews or My Employees’ Reviews.
2. Click on the review title.
3. Select Progress Notes.