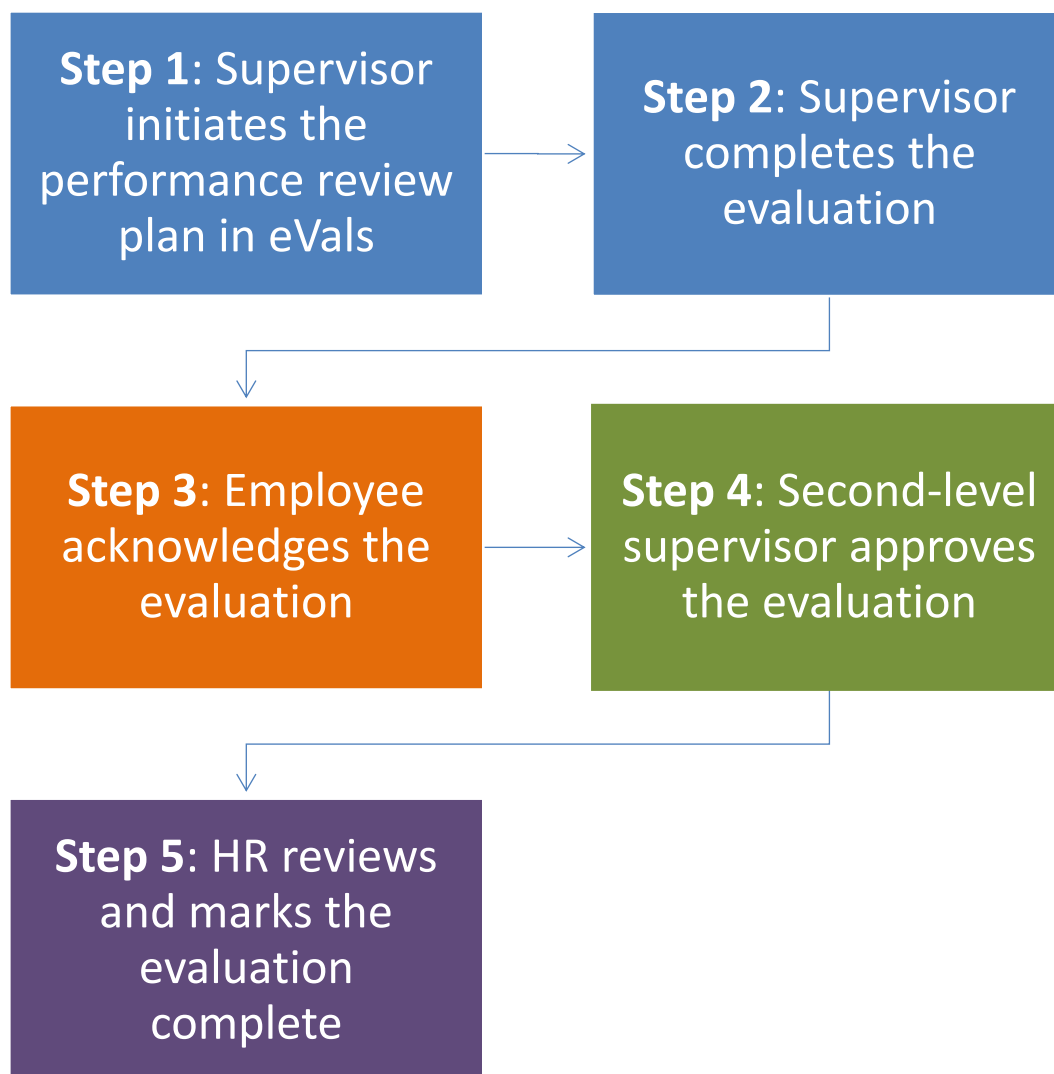


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## Probationary Evaluation Process

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



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## Step Instructions

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

Supervisor: When the new employee is entered into the eVals system, you will receive an email to create the Probationary 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](https://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 that employee's name.
5. The General Objectives are automatically added to the plan. You can optionally add additional goals on the Performance Goals tab.
6. You can also optionally add a co-reviewer using the **Add Co-reviewer** link. The co-reviewer will have the same access as you to complete all or part of the evaluation.
7. 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: Supervisor completes the evaluation

Supervisor: This step may be completed starting the employee's 5<sup>th</sup> month of employment. 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](https://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: 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 3: 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](https://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: 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 4: 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](https://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 4: 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 5: 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.

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## Progress Notes

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For each performance evaluation plan, both the employee and supervisor can add progress notes starting the first day the plan is initiated by the supervisor. Employees may use Notes to record project completions, training or other milestones. Supervisors may use Notes to track employee progress or other performance-related documentation. Your progress notes are NOT available for your supervisor or employee to view unless you mark them as 'Share this Progress Note'.

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

1. Select the 'Progress Notes' tab at the top of the eJobs Portal screen.
2. Click the Create Progress Note button.
3. Select the evaluation program related to this note (e.g. the annual performance program for this year).
4. Select your name from the 'Employee' dropdown or your employee's name.
5. Under 'Type', select a category or 'Other'.
6. Give the note a title (e.g. 'Completed Performance Evaluation Training').
7. Enter your note in the 'Comments' box.
8. Scroll down to select 'Share this Progress Note' if you want to share this note with your supervisor if this is your progress note or your employee if this a note regarding your employee's performance.
9. Scroll down and select **Attachment** to add an attachment to this note. Enter a name for the attachment (e.g. 'Training completion certificate'). Click **Browse** to locate and upload the document.

You can also create a Progress Note directly into a specific evaluation program:

1. From the menu bar on the left, select **My Reviews** (or **My Employees' Reviews**).
2. Click on a review title.
3. From the menu on the left, click **Progress Notes**.
4. Click the **Create Progress Note** button. The 'Program' and 'Employee' fields will fill in automatically.
5. Under 'Type', select a category or 'Other'.
6. Give the note a title (e.g. 'Completed Performance Evaluation Training').
7. Enter your note in the 'Comments' box.
8. Scroll down to select 'Share this Progress Note' if you want to share this note with your supervisor if this is your progress note or your employee if this a note regarding your employee's performance.
9. Scroll down and select **Attachment** to add an attachment to this note. Enter a name for the attachment (e.g. 'Training completion certificate'). Click **Browse** to locate and upload the document.