

# User Guide for NMSU Online Staff Evaluation

<https://evaluation.nmsu.edu/>

This user guide provides instructions for using the **Staff** Evaluation Web Application, from now on also referred to as the “application” or “system”.

## Table of Contents

I. Accessing the Evaluation Web Application .....	2
II. Overview of Site Options.....	2
III. Immediate Supervisor Functions .....	3
A. Completing an Evaluation.....	3
B. Deleting an Evaluation .....	10
C. Recalling an Evaluation for Further Editing .....	10
D. Reviewing Finished Evaluation .....	10
IV. Signing and Acknowledging as Employee.....	11

## Questions?

If you have questions or need assistance with the Staff Evaluation Web Application, please contact the Office of People Relations at [opr@nmsu.edu](mailto:opr@nmsu.edu) or (575) 646-2449.

## I. Accessing the Evaluation Web Application

The application can be directly accessed at <https://evaluation.nmsu.edu> or from the HR Services homepage at <http://hr.nmsu.edu/>.

To log in, use the same credentials as you would for MyNMSU.

The screenshot shows the login interface for the Employee Evaluation system. On the left is a large banner with the NMSU logo and the text "BE BOLD. Shape the Future. New Mexico State University Employee Evaluation". On the right, there is a "Login" section with fields for "Username" and "Password", and a "Log in" button. Below the login fields is a "TROUBLE LOGGING IN?" section with a link to "Contact the IT Help Desk". At the bottom right is the "OFFICE OF PEOPLE RELATIONS" contact information, including a phone number (575) 646-2449 and an email address opr@nmsu.edu.

## II. Overview of Site Options

Upon logging in, the user will be directed to the application home page.

The home page consists of a brief introduction, an **Inbox**, a **Sent Items** box and **Toolbar** along the top.

- **Inbox:** is where a supervisor will find all items needing their attention.
- **Sent Items:** is where a supervisor will see items that they have worked on that are either pending signature by the employee or completed.
- **Toolbar:**
  - **Date button** (i.e., 2024 – 2025 ▼): is where any user can access previous year evaluations (if you were evaluated in the system or evaluated/approved others in the system). The default year is the immediately preceding year, and the drop-down button will display years prior to that.
  - **Logout:** is where you will log out of the system.

The screenshot shows the application home page. At the top is a header bar with the NMSU logo, "Employee Evaluation", a welcome message "Welcome, Joell Austin", a "Home" link, a year selection dropdown set to "2024 - 2025", and a "Logout" button. Below the header is a section titled "Evaluation Year 2026" containing a message about the submission period, instructions for the application, and links to user guides. Below this is a main content area with a grey bar labeled "Inbox (Click Select Employees to evaluate your staff)" with a "Select Employees" button. Underneath are sections for "My Evaluation" (stating "Your evaluation has not been started.") and "Sent Items". Colored arrows from the text list point to specific elements: a red arrow points to the year dropdown, a purple arrow points to the Logout button, a blue arrow points to the "Inbox" header, and a green arrow points to the "Sent Items" header.

# III. Immediate Supervisor Functions

## A. Completing an Evaluation

1. To begin an employee’s evaluation, click on the **Select Employees** button located in your Inbox.

Inbox (Click Select Employees to evaluate your staff.)

Select Employees

My Evaluation

Your evaluation has not been started.

2. Another page will open. Here, you will find a list of all staff members who report to you, as per the Banner system. Select the **Add** button for each employee you want to begin evaluating.

Note: If you do not see an employee you must evaluate in your list, click on **Click here to search for employees not in your list** to search by name or Aggie ID. If the reporting structure data is incorrect and must be changed on the Banner system, contact your unit’s HR Liaison who may request a permanent change using a Personnel Action Form (PAF).

Select Employee

According to our records, the employees listed below report to you. To begin an evaluation, please click the "Add" button. Upon adding an employee you will see his/her name within Evaluations in Progress list.

Name	Aggie ID	Exempt Status	Job Title	Department	Evaluated By	Add
		Exempt	HR Specialist,Assc	Employee & Labor Relations		Add
		Exempt	HR Specialist,Sr	Employee & Labor Relations		Add
		Exempt	HR Spec, Inter	Employee & Labor Relations		Add

Click here to search for employees not in your list (Search by "Last Name,First Name" or "Aggie ID")

Close

Enter the employee name or Aggie ID, the name will populate, then add the employee.

Click here to search for employees not in your list (Search by "Last Name,First Name" or "Aggie ID")

Show 5 entries

Search Houdini

First Name	Last Name	Exempt Status	Job Title	Department	
Harry	Houdini	Exempt	Master Magician	Health & Wellness	Add

Previous 1 Next

3. On your home page, the employee’s name will display in the Inbox in the *Evaluations in Progress* section. Click on the employee’s name to open the evaluation form.

Inbox (Click Select Employees to evaluate your staff.)

Select Employees

Employee	Aggie ID	Exempt Status	Job Title	Document Status	Actions
Evaluations In Progress					
Harry Houdini	80011111	Exempt	Master Magician	In process by immediate supervisor	Delete

4. The first page of the evaluation form will appear and the header of the form will automatically populate with employee and supervisor information.

**Exempt Employee Performance Evaluation and Planning Form (January 01, 2021 - December 31, 2021)**

Form: 47024      Status: Complete      Score: 6.67

Name: Jane Awesome      Title: Employee Relations Spec, Sr  
Aggie: 60001234      Department: Employee & Labor Relations

Started NMSU: 2/18/2018  
Started Position: 3/10/2019

Evaluator: Pierre de Chardonay      Dir: Employee & Labor Relations | Employee & Labor Relations

5. To begin the evaluation, click the **Start** button. Note: You may jump to other sections from the Document Home page by selecting the section you want to go to.

**Exempt Employee Performance Evaluation and Planning Form (January 01, 2021 - December 31, 2021)**

Form: 47024      Status: Complete      Score: 0.00

Name: Jane Awesome      Title: Employee Relations Spec, Sr  
Aggie: 800012345      Department: Employee & Labor Relations

Position Classification Descriptions

Started NMSU: 2/18/2018  
Started Position: 3/10/2019

Evaluator: Pierre de Chardonay      Dir: Employee & Labor Relations | Employee & Labor Relations

6. **Past Period Performance - Part 1 and Part 2:** Select a score for all categories in these sections. Comments are required for all ratings of 'Unsuccessful/Unacceptable', 'Partially Successful/Needs Improvement', and 'Distinguished Performance'. When you select the START button, it will take you to Part 1. When finished, it will automatically take you to the next section.

**Past Period Performance**

Part 1: Categories 1-6      Go

Part 2: Categories 7-12      Go

Part 3: Assessment of Achievement of Goals      Go

**Planning for the Year Ahead**

Part 1: Goals for the Year Ahead      Go

Part 2: Professional Development      Go

Part 3: Areas for Improvement      Go

**Validation Error**  
1. Achievement Toward NMSU Strategic Goals: Comments required for "Unsuccessful/Unacceptable Performance".

#### HINTS for Form Page Navigation Information and Options

- When the application identifies that required information is missing and needed to move on, an instructional message will appear at the top of the form in highlighted text, alerting you to the specific information that is missing.
- The overall evaluation score can be found in the header of each evaluation form, and it is updated as each section is scored.
- When you hit the "next" button to progress from one page to the next, the system will auto-save your entries. A Pop-Up will briefly display on the top right-hand corner of your screen.

**Past Period Performance – Part 3:** The goals established the previous year will appear (note: employees not evaluated in the system the previous year will not have pre-populated goals). You should select a rating for each goal. A rating of Deferred can be selected when it is determined that the goal was put on hold during the evaluation period but remains relevant. A rating of 'Cancelled' can be selected when it is determined that the goal is no longer applicable (for example, a transfer from one department to another) or is no longer relevant. A score of 'Deferred' or 'Cancelled' counts as zero points and is not factored into the overall score. A comment is required when either of these is selected.

The 2025 LEADS Strategic Goals concluded in June 2025. While some employees may not have goals that directly align with the 2025 LEADS initiatives, a LEADS category must still be selected. In these cases, you should choose the category that most closely represents the intent or focus of the goal being documented.

LEADS Goal 4: Build a Robust University System

**Goal**

4.3. Establish Operational Excellence Through a Metrics Driven Processes that Drive Operational Efficiencies.  
4.3.7. Ensure support system to enable employees to meet their individual, unit, and enterprise goals  
Collaborate with the HR directors in the development of a dashboard for HRS metrics.

(901 characters remaining)

**Objective and Measurement**

HR Metrics dashboard developed, published and regularly updated.

**Rating:**

- ☐ Fails to Meet Expectations
- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations
- ☐ Exemplary
- ☐ Deferred
- ☐ Canceled

If the goals are not applicable due to a transfer from another department, or the employee was not evaluated in the system last year, you can add goals that were established. After selecting “Canceled,” you can add applicable goals and then rate accordingly.

(1906 characters remaining)

**Comments**

Not applicable due to job change.

(1467 characters remaining)

**Rating:**

- ☐ Distinguished Performance and Role Model Status
- ☐ Deferred
- ☒ Canceled

**Add Goal**

- Performance Summary** – After rating the achievement of the previous period goals, you may include comments on the employee’s overall performance. These comments will be viewable to the employee after you send the evaluation to them for signature (the last step).

**Performance Summary**

Include any final comments concerning the employee's performance during the past period (optional)

(1500 characters remaining)

**Document Home**

**Previous** **Next**

8. **Planning for the Year Ahead - Part 1: Goals for the Year Ahead:** Goals should reflect the primary focus of an individual in support of the established department or university objective. Remember the SMART Methodology when setting goals

Past Period Performance	Planning for the Year Ahead
Part 1: Categories 1-5	Part 1: Goals for the Year Ahead
Part 2: Categories 6-10	Part 2: Professional Development
Part 3: Assessment of Achievement of Goals	Part 3: Areas for Improvement

Within the system, there is a link to a tutorial on making SMART goals.

**Section 2 - Part 1 : Goals for the Year Ahead**

**Instructions:** Goals should reflect the primary focus of an individual in support of established department or university objectives.

Remember to us the SMART Methodology when setting goals:

Specific – Measurable – Attainable – Relevant – Timely

[A short tutorial is available to help with making SMART goals.](#)

### Department/Organizational Unit Goal

A department or organizational goal may be entered, and at least one individual goal is required. The system will display space for 1 individual goal. Use the **Add Goal** button to add goals as needed. (Hint: these will be the goals that will appear in Section 1- Part 3 next year).

**Department/Organizational Unit Goals:**

---Select from Goals---

**Individual Goal**

**Objective and Measurement**

Choose NA in the “drop-down” box. You will be prompted to enter the individual goal in the “Goal” box.




N/A

**Individual Goal**

(1200 characters remaining)

For the objectives and measurement text box, you will develop your own objective/action that supports the goal and meets the needs of the unit. Next, you will identify how the action will be measured.

### Objective and Measurement



Objective: 1.3 Develop a culture of 'Aggie Life' that reflects service-learning, experiential learning, engagement in campus community, and engagement in research experiences.  
Action: Engage university faculty and staff in Aggie Life experiences. Attend and track at least three Aggie Life functions this year.  
Measure: Amount of Aggie Life function attended at the end of the performance period.

(1592 characters remaining)

9. **Planning for the Year Ahead - Part 2: Professional Development (Optional):** This section allows you to establish professional development opportunities for employees. You may use this section to document specific areas for development and the associated activities that support the employee's career development. Up to two areas may be established. Use the **Add Area** button to enter a second area.

### Planning for the Year Ahead

Section 2 - Part 2 : Professional Development (Optional) Add Area

**Instructions:** Professional development opportunities may be established by the supervisor, working in collaboration with the employee to identify the skills and knowledge needed to advance professionally. Supervisors may use this section to document specific areas for development and the activities associated to support the employee's career development within the organization's business needs.

**Professional Development 1** Delete

10. **Planning for the Year Ahead - Part 3: Areas for Improvement:** This section is required only if the employee's overall score is 4.55 or lower. You should describe the areas that need improvement and outline the specific improvement activities that should be implemented. Up to two areas may be established. Use the **Add Area** button to enter a second area if needed. If the score is not 4.55 or lower, you can still use this section to address any areas that need improvement. A follow-up date must also be selected.

If the employee had an area for improvement in the previous evaluation, the content will populate, giving you an opportunity to review it with the employee.

## Planning for the Year Ahead

Section 2 - Part 3 : Areas for Improvement

Add Area


Instructions: Required if Overall Evaluation Score is 4.55 or lower. Optional if score is 4.56 or above, although recommended for categories that received a rating of Partially Successful Performance/Needs Improvement or Unsuccessful/Unacceptable Performance. Identify the areas of skill or behavior needing improvement to perform the current job.

Area for Improvement 1

Delete

(1200 characters remaining)

11. When the evaluation is complete, you will schedule a meeting with the employee to discuss the evaluation and future goals. For this meeting, you may opt to print the PDF version (to the left of the employee's name on the home screen) of the document made available in the system (if an in-person meeting) or send the PDF version to the employee via email.

Inbox (Click Select Employees to evaluate your staff.)				
Employee	Aggie ID	Exempt Status	Job Title	Document Status
Evaluations In Progress				
		Nonexempt	Admin Asst, Inter	In process by immediate supervisor

If, after the meeting, you want to edit the evaluation, you can do so at the home page by clicking on the employee's name, which will open the evaluation and allow for edits.

***\*\*Note: Please contact the Office of People Relations if you have questions regarding the in-person meeting process. This guide is designed to help with utilizing the web application only.***

### TIP

- If after meeting with the employee you wish to edit a rating, comment or goal, simply open the evaluation and make desired changes.

12. Following the meeting (in person or virtual), you will open the employee's form and **sign** it. Upon signing the evaluation, the employee will receive an automated email stating that the evaluation is ready for signature.

Employee Performance Evaluation and Planning Form ( January 01, 2025 - December 31, 2025 )

Sign

Form: 59882

Status: In process by immediate supervisor

Score: 0.00

Name: Monica Hoyle

Title: People Relations Consultant

Started NMSU: 02/17/2025

Aggie ID: 800920721

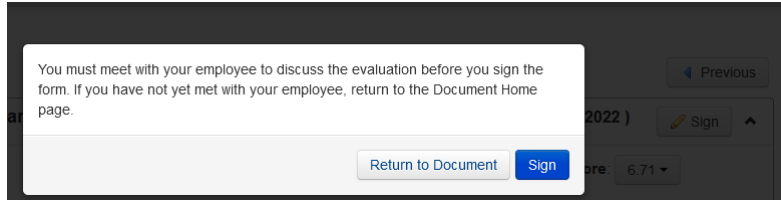
Department: Office of People Relations

Started Position: 02/17/2025

Evaluator: Joell Austin (800863331) | People Relations Consultant | Office of People Relations



When you select the “Sign” button, the system will remind you to meet with your employee first.







## B. Deleting an Evaluation

Evaluation forms may be deleted once they have been started. This feature may be useful if someone else is asked to evaluate an employee or if a form needs to be reset so that the you can start over. Forms can only be deleted from the Inbox.

Inbox (Click Select Employees to evaluate your staff.)					Select Employees	
Employee	Aggie ID	Exempt Status	Job Title	Document Status	Actions	
Evaluations In Progress						
		8001111111	Exempt	HR Specialist, Assc	In process by immediate supervisor	

## C. Recalling an Evaluation for Further Editing

You can recall the electronic evaluation for editing after signing it, as long as the employee has not signed it. However, since a meeting with the employee occurs before you sign it, edits should occur before signing it.

Sent Items						
Supervisor Activities						
Employee	Aggie ID	Exempt Status	Job Title	Sent to	Document Status	Actions
		8001111111	Exempt	HR Specialist, Assc		Pending next level approval
						

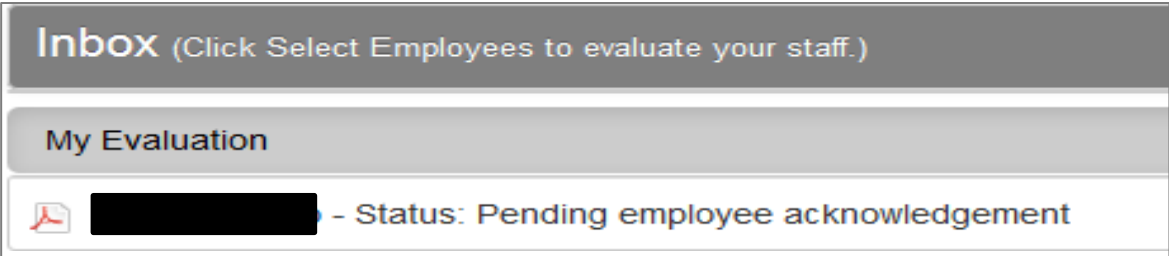
## D. Reviewing Finished Evaluation

When evaluations have been fully routed and signed, you will see them in your Sent Items box as complete. These will remain viewable in a read-only format throughout the year. At the end of each calendar year, the forms will be stored in Portable Document Format (PDF) in the toolbar, under the "Past Year/Dated" section.

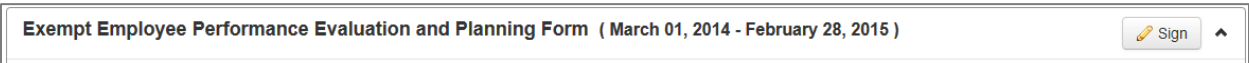
Inbox (Click Select Employees to evaluate your staff.)						
My Evaluation						
Your evaluation has not been started.						
Sent Items						
Supervisor Activities						
Employee	Aggie ID	Exempt Status	Job Title	Sent to	Document Status	Actions
		8001111111	Exempt	Employee Relations Spec, Sr	Complete	
		8001111111	Exempt	Employee Relations Spec, Sr	Complete	
		Nonexempt	Employee Relations Spec, Assc		Complete	

# IV. Signing and Acknowledging as Employee

- 1. When you sign the completed evaluation, the employee is notified via email. The employee can log in using the link provided in the email or directly through the application. The employee’s evaluation will appear under the ‘My Evaluation’ section of the Inbox. The employee should click on their name to open and view the evaluation.



- 2. The evaluation form will appear in a read-only format, and the employee may sign their evaluation from any page of the form.



- 3. Upon clicking the **Sign** button, The Employee will have the opportunity to leave a comment. The employee’s form will remain viewable in a read-only format throughout the year. At the end of each calendar year, the forms will be stored in Portable Document Format (PDF) in the toolbar, under the "Past Year" section.