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”.

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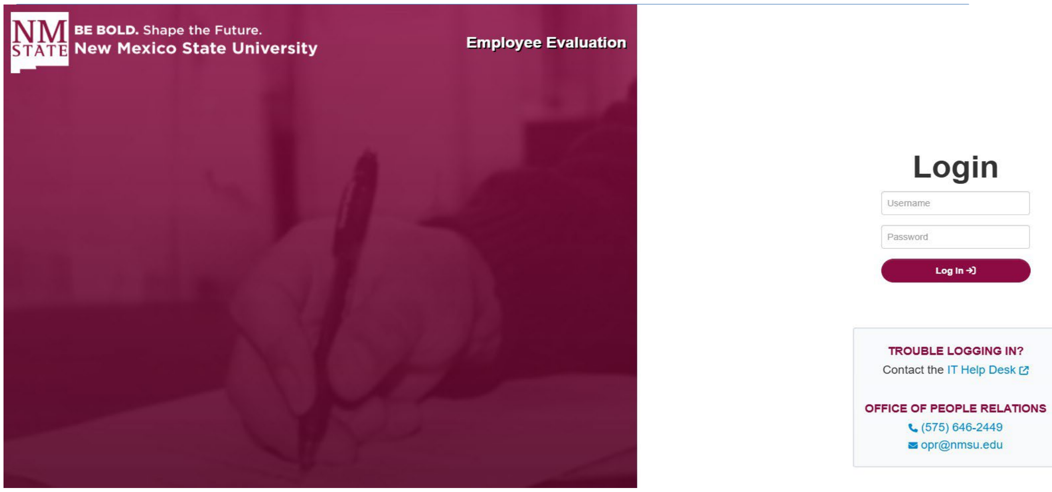
Questions?

If you have questions or need assistance with the Staff Evaluation Web Application, please contact the Office of People Relations at opr@nmsu.edu 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/.

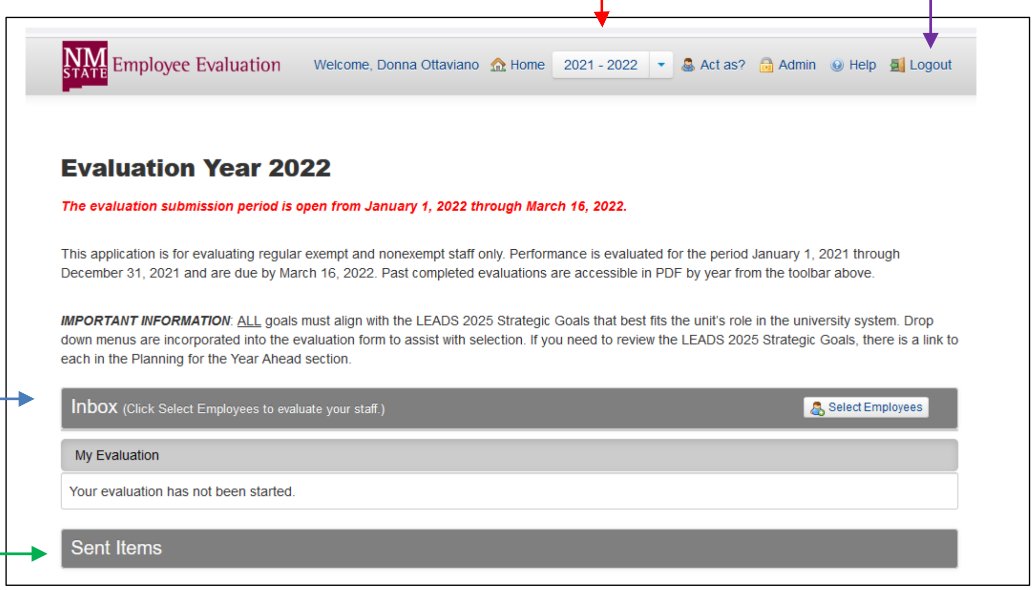
To log in, use the same credentials as you would for MyNMSU.



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.

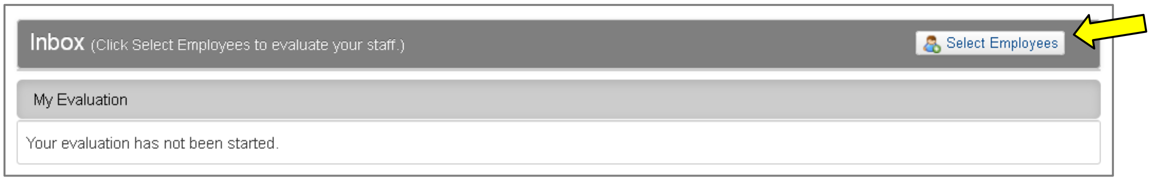
- **Inbox:** is where a supervisor will find all items needing their attention.
  - **Sent Items:** is where a supervisor will see items that they have worked on that are either pending signature by the employee or completed.
- **Toolbar:**
  - **Date button** (i.e. 2020 – 2021 | ▼): is where any user can access previous year evaluations (if you were evaluated in the system or evaluated/approved others in the system). The default year is the immediate past year and the drop-down button will display years prior.
  - **Logout**: is where you will logout of the system.



III. Immediate Supervisor Functions

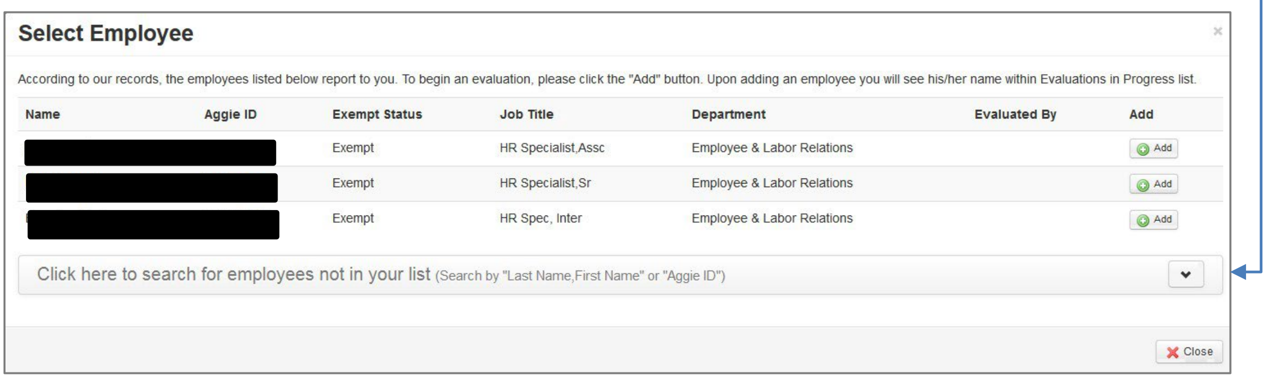
A. Completing an Evaluation

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

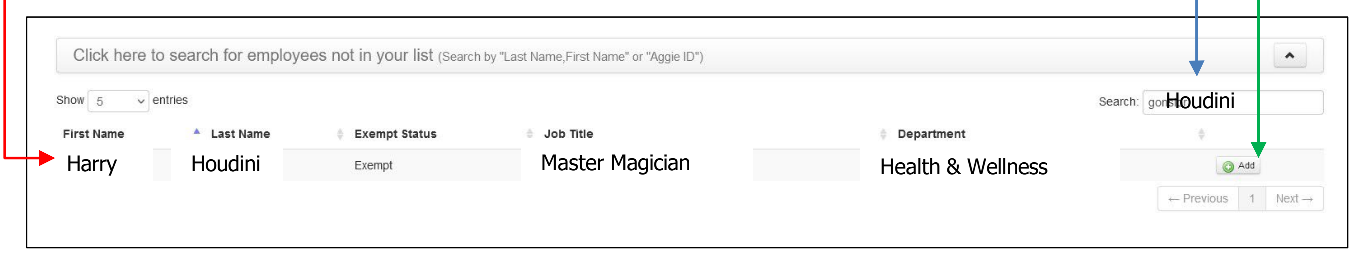


2. Another page will open. Here you will find a list of all staff who report to you according to the Banner system. Select the **Add** button for each employee you want to begin evaluating.

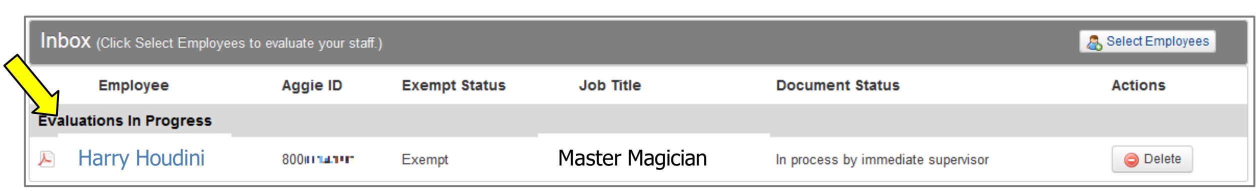
   Note: If you do not see an employee you must evaluate in your list, click on **Click here to search for employees not in your list** to search by name or Aggie ID. If the reporting structure data is incorrect and must be changed on the Banner system, contact your unit’s HR Liaison who may request a permanent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



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



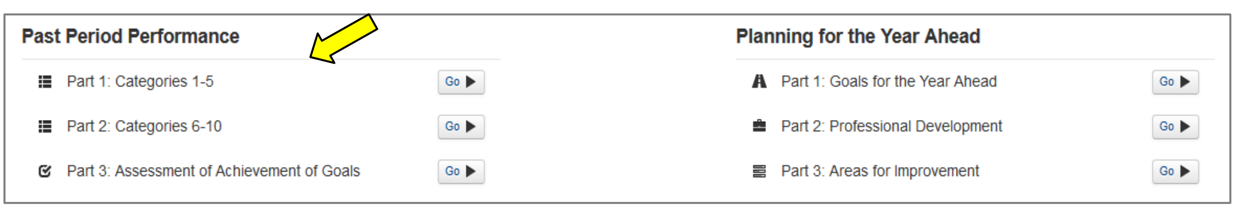
3. On your home page, the employee’s name will display in the Inbox in the *Evaluations in Progress* section. Click on the employee’s name to open the evaluation form.

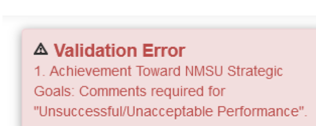


4. The first page of the evaluation form will appear and the header of the form will automatically populate with employee and supervisor information.

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.

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.

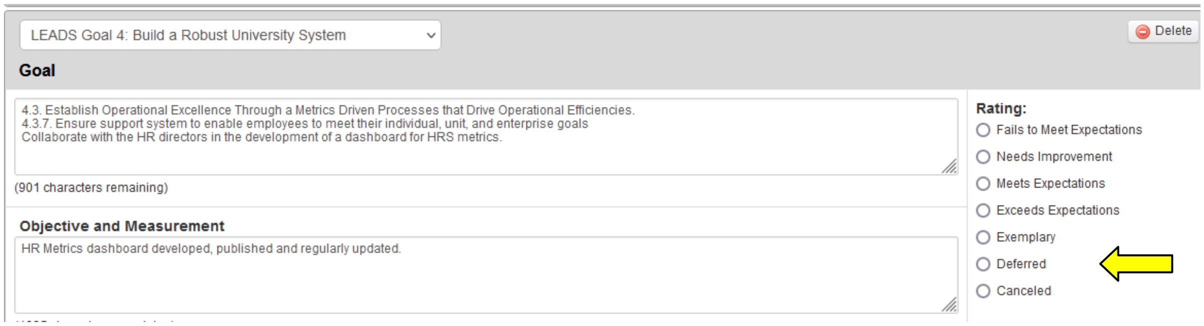




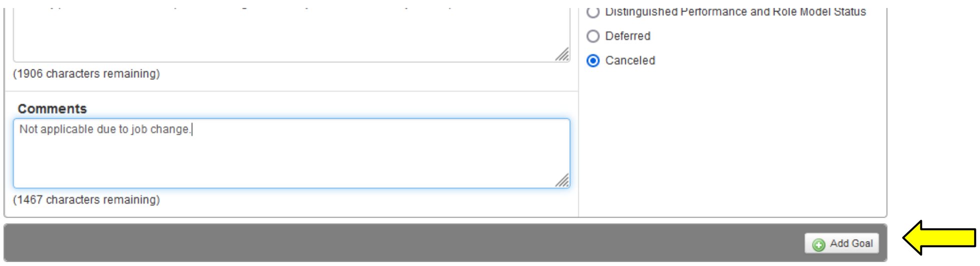
HINTS for Form Page Navigation Information and Options

- 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.

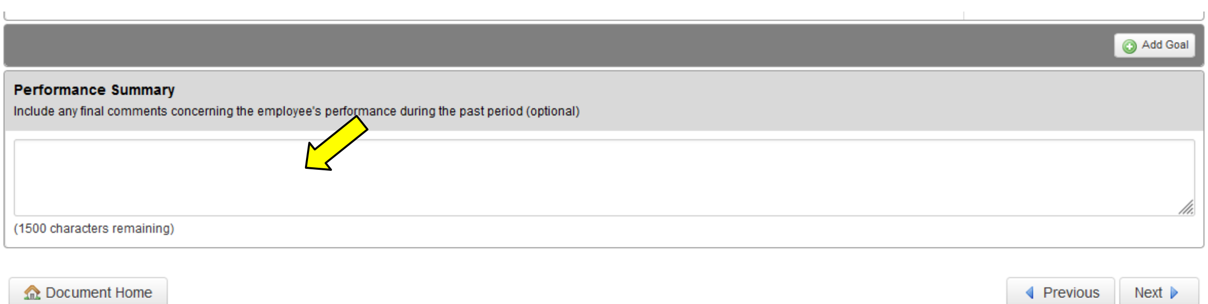
7. **Past Period Performance – Part 3:** The goals established the year before will appear (note: employees not evaluated in the system the year before will not have pre-populated goals). You should select a rating for each goal. A rating of Deferred can be selected when it is determined that the goal was put on hold during the evaluation period, but is still relevant. A rating of Cancelled can be selected when it is determined the goal is no longer applicable (for example: transfer from one department to another) or 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.



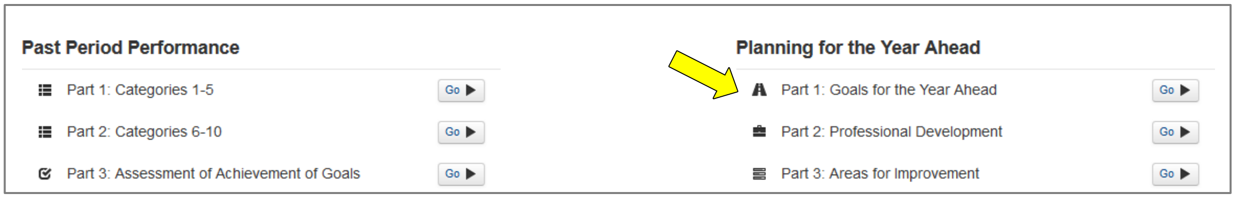
If the goals are not applicable due to a transfer from another department, or the employee was not evaluated in the system last year, you can add goals that were established. After selecting "Canceled" you can add applicable goals and then rate accordingly.



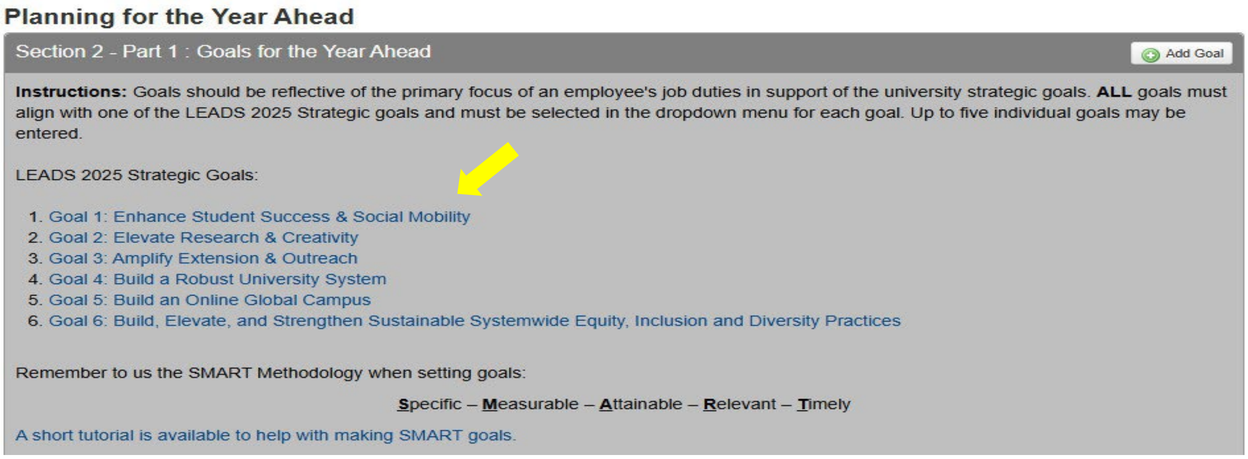
8. **Performance Summary** – After rating the achievement of the previous period goals, you may include comments on the employee's overall performance. These comments will be viewable to the employee after you send the evaluation to the employee for signature (last step).



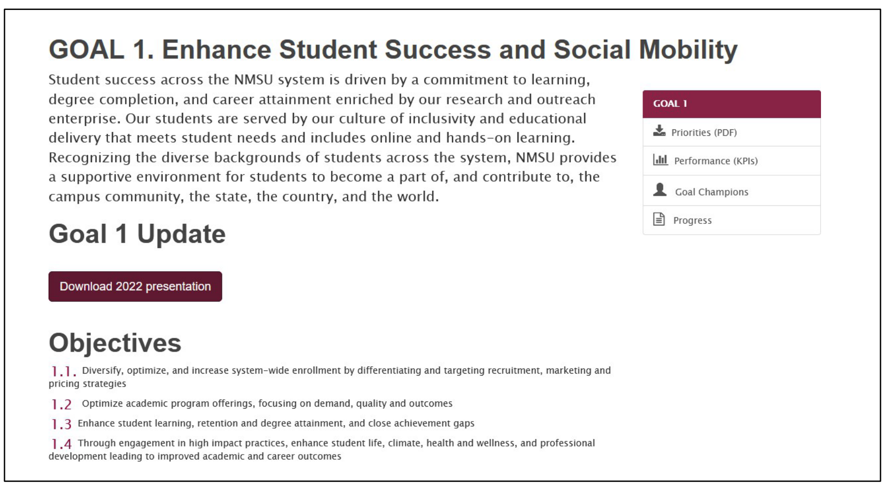
9. **Planning for the Year Ahead - Part 1: Goals for the Year Ahead:** All goals should align with NMSU LEADS Strategic 2025 goals. For more in depth information regarding NMSU Leads 2025 goals please go to the following web site: https://leads2025.nmsu.edu/index.html.



Within the sytem there are links to each of the Leads 2025 Goals:

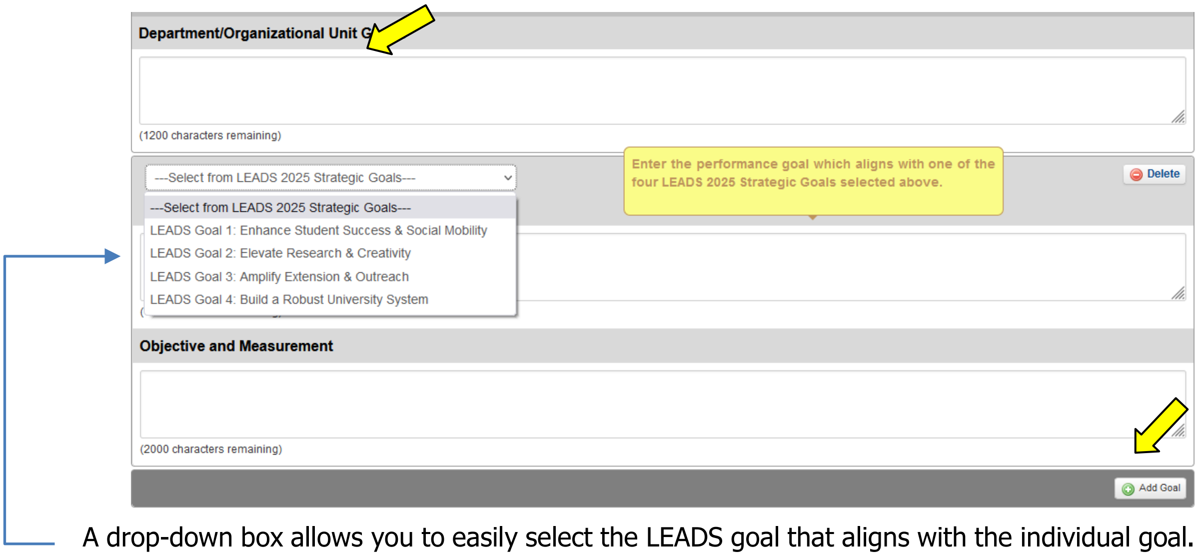


By clicking on any of the goals in the instructions, you will be taken to a webpage that outlines the goal and objectives/actions for each goal. Further information regarding the actions associated with each objective will be found by clicking on the objective link.



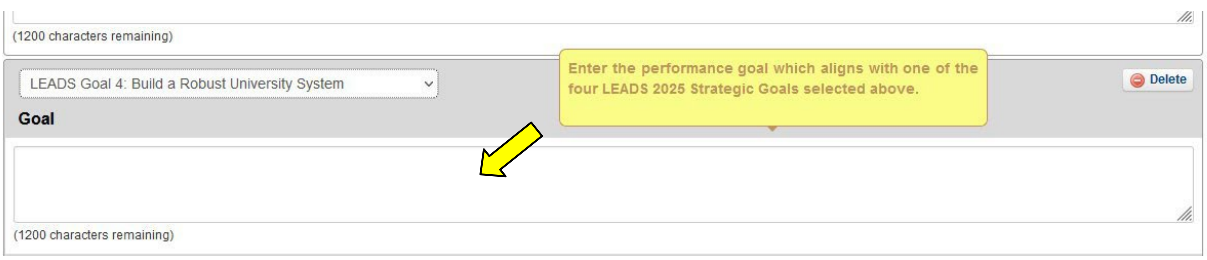
Department/Organizational Unit Goal

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).

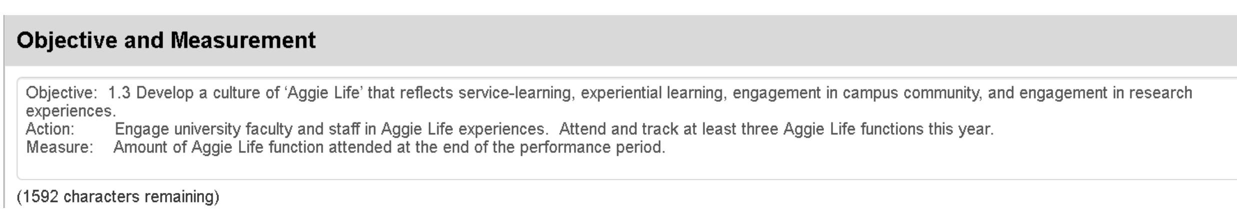


A drop-down box allows you to easily select the LEADS goal that aligns with the individual goal.

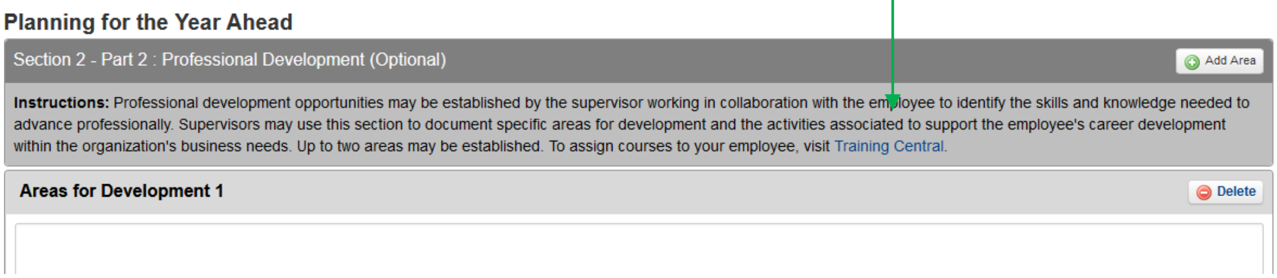
You will be prompted to enter the individual goal in the "Goal" box.



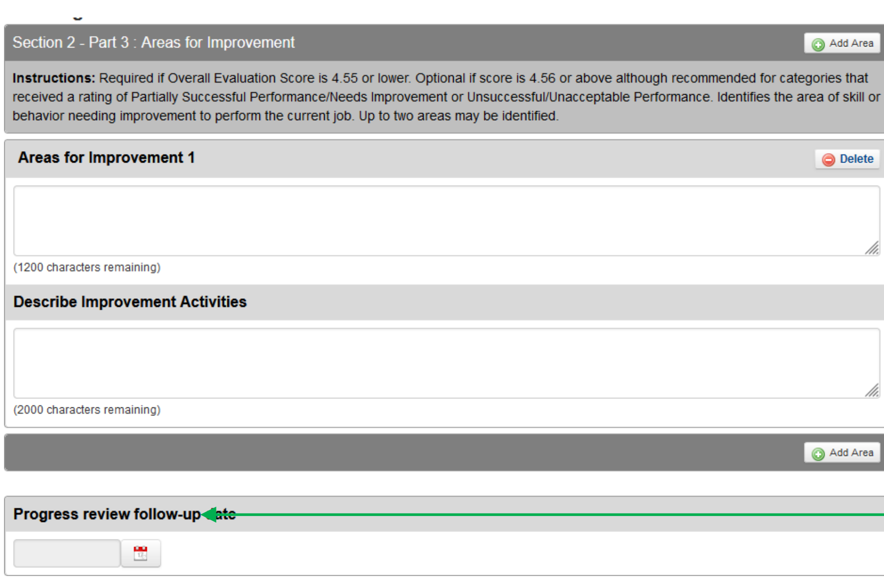
For the objectives and measurement text box, you may review and select an objective and action from the those associated with the LEADS strategic goal. Next, you will identify how the action will be measured. ***Note: You may also choose to develop your own objective/action that supports the goal if the one listed does not meet the needs of the unit.**



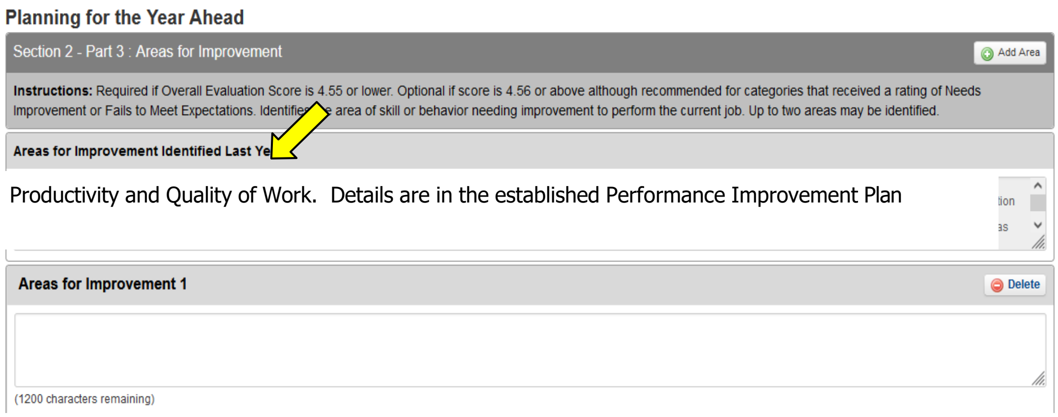
10. **Planning for the Year Ahead - Part 2: Professional Development (Optional):** This section is where you may establish professional development opportunities for an employee. You may use this section to document specific areas for development and the activities associated to support the employee's career development. **Up to two areas** may be established. Use the **Add Area** button to enter a second area. A link to "Training Central" has been provided where you can choose to assign training/development activities to the employee.



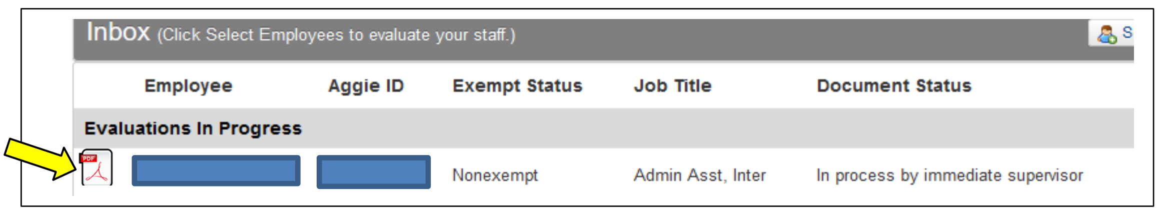
11. **Planning for the Year Ahead - Part 3: Areas for Improvement:** This section is required only if the employee's overall score is 4.55 or lower. You should describe the areas needing improvement and the improvement activities that should take place. Up to two areas may be established. Use the **Add 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 to give you an opportunity to review with the employee.



12. 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.



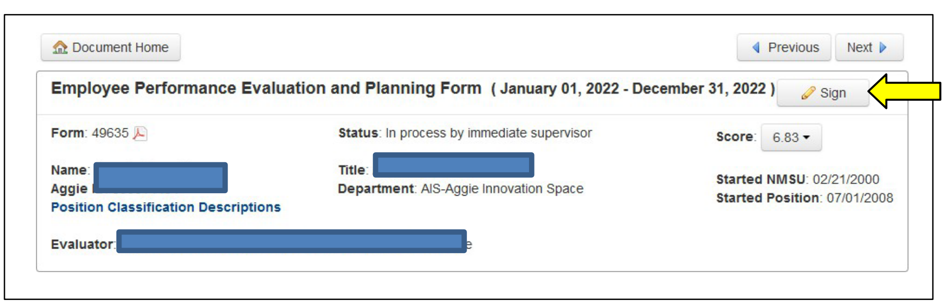
If after the meeting you want to edit the evaluation, you can do so at the home page, by clicking on the employee's name, which will open the evaluation and allow for edits.

Note: Please contact Employee and Labor Relations if you have questions regarding the in-person meeting process. This guide is designed to help with utilizing the web application only.

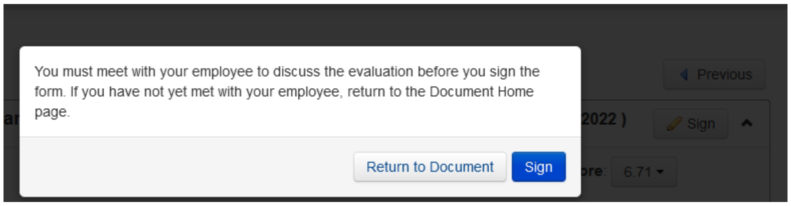
TIP

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

13. 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.



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

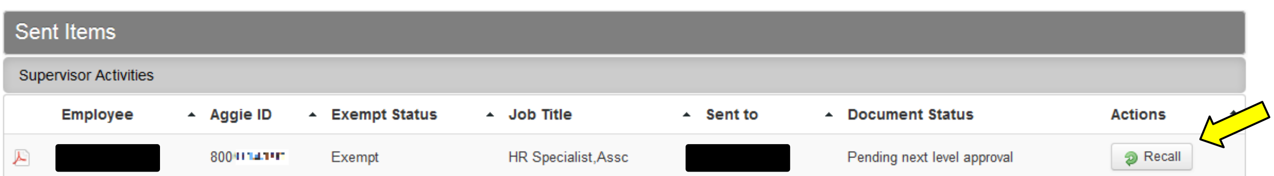


B. Deleting an Evaluation

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.

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.

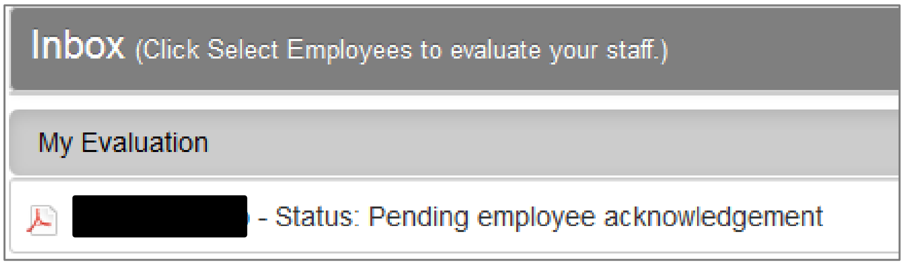


D. Reviewing Finished Evaluation

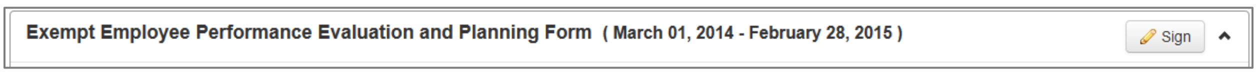
When evaluations have been fully routed and signed, you will see them in your Sent Items box as complete. These will remain viewable in a read-only format year-round. At the end of each calendar year, the forms will be stored in a portable document format (PDF) in the toolbar, in the past year/dated section.

IV. Signing and Acknowledging as Employee

1. When you sign the completed evaluation, the employee is notified via email. The employee may login from the link provided in the email or directly into 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 year-round. At the end of each calendar year, the forms will be stored in a portable document format (PDF) in the toolbar, in the past year section.