Managing Staff Annual Performance Evaluations

This guide will cover:
- Completing the Annual Performance Evaluation process for classified staff.

This guide details the steps for completing this process using Supervisor/Manager WyoCloud access.

Step One
Sign into WyoCloud HCM and navigate to the My Team Performance page.
- Upon signing in, this home page will display. To get to the My Team page, click on the Navigator button (the three horizontal lines) in the top left corner:

![Navigator button](image)

- Select Performance under My Team.
- The ‘My Manager Evaluations: 2018 Annual Review Period’ (or current review period) Team Performance page will display.

   ![Image of WyoCloud interface]

   **Note:** Make sure the review period is for the year you are evaluating. If not, click on the grey triangle icon to select the correct review period.

   ![Image of WyoCloud interface with note]

**Step Two**

Create and open the Performance document for the selected employee.

- Scroll down to find the employee that you want to evaluate.
Before beginning the evaluation, click the grey arrow next to Staff Annual Evaluation. This will expand the list of supervisor performance tasks in the order in which they need to be completed.

- Click Begin next to Set Goals & Competencies.

A pop-up window will appear where a start and end date must be chosen. These items, along with the manager’s name will auto populate.
- Click Continue.
The employee’s annual evaluation page should then display.

**Step Three**
Set competencies for evaluation.

- In the Annual Evaluation, the Competencies will be the first page that appears. It will contain Universal or Core Competencies, followed by the employee’s job competencies from their job profile.

**Note:** The top three competencies are Universal to all Staff employees. They are identified with an asterisk and will default to a percentage of 10%. This is a suggested weighting and can be adjusted to meet the needs of the supervisor and/or department.

- To set competencies, the supervisor needs to add weights to each competency.
- To change the weight, type in the new weight in the **percentage box** on the right side of the page.
- The competency Section must have a total weighting of 100%
Step Four
Set goals for evaluation.

- Setting goals requires ensuring that all the proper goals have appeared in the performance evaluation, as well as adding weights to each goal. This may require adding or deleting goals.
- After setting the competencies and weights, click on the **grey arrow** in the Goals info tile/box on the left-hand side.

- The Goals page should display.

- To add a goal, click the triangle next to “Add Goal”, and select **New Goal**.
- The Add Goal page should display. Fill out the required fields, then click **Save and Close** in the top-right corner.

- To delete a goal, highlight the goal by clicking on the goal line or row, and then click **Remove**. The goal will then be removed.

- A Warning window will display. After selecting your option, click **Yes**.

  **Note:** Clicking “Remove the selected goal from this performance document” will remove the goal from the performance evaluation but not the direct reports annual performance goal plan. This will allow you to use the goal again for later use. Clicking “Delete selected goal from the performance document and goal list” will remove the goal from the performance document and the direct report’s annual performance goal plan. You would not be able to access the goal again in the future.

- A Confirmation window should display. Click **OK**.
- Once the desired goals have been added or deleted, you must assign weight to the goals. The total weight percentage must add up to 100%.
- To change the weight of a goal, type in the new weight in the percentage box on the right side of the page.

### Step Five

Save and submit.
- Once all competencies and goals have been auto-populated, added, and/or deleted, and the weights have been assigned, click **Submit** in the top right corner of the page.
- A Warning pop-up should display. Click **Yes**.
- A Confirmation window should display. Click **OK**.
- The My Manager Evaluations page will then return. A green check mark will appear next to the Set Competencies & Goals showing that the task is complete.
**Note:** The next step is the Employee Self-Evaluation, but the supervisor can start the Manage Participant Feedback task, if necessary. If the employee does not fill out their self-evaluation, the supervisor can bypass the employee self-evaluation task to move forward with either adding a participant, or going straight to the supervisor evaluation.

- To bypass the Self-Evaluation, the manager can click on the View hyperlink button.

- At the top of the Self-Evaluation page, click the Bypass Task button.

- A confirmation window will appear.
- Click OK.

- The system will log that the task was Bypassed with the date of the action. This is visible to the employee, supervisor, and Human Resources.
Note: If bypassing the employee self-evaluation is not necessary, wait for the employee to complete the self-evaluation until the manager’s next step can be completed.

Step Six
Notification of Direct Report Completing Self Evaluation

- Sign into WyoCloud HCM and navigate to the My Team Performance page.
- Click the Bell icon in the top right corner to see the notifications.

Note: Note: you MUST make sure your popup blocker allows permissions for popups. Set them to “Always allow” to receive all notification popup windows.

- The notification that corresponds to the performance document should display “Self-Evaluation for *Employee’s Name* in Staff Annual Evaluation 2018 (or current cycle) was Completed”. Click the hyperlink of the desired employee.
- A popup window explaining that the self-evaluation was completed will appear.
- Click the hyperlink labeled “Go to performance document: Staff Annual Evaluation 2018 (or current review period).”
Once the supervisor receives the notification that the employee has completed their self-evaluation, the supervisor can then begin their part of the evaluation.

Go to Navigator > My Team > Performance.

The My Manager Evaluations Team Performance page should display.

Scroll down to find which employee you want to evaluate or utilize the filter to find the employee.
Step Seven
Evaluate Direct Report competencies.

- The employee’s competencies from their job profile and their goals from their goal plan will automatically pull into the performance evaluation, as well as with any universal or core goals/competencies that are tied to the performance template.
- Click the blue information icon next to the competencies, a popup should appear that gives the competency definition and explains the rating model definitions related to the star scale.
- When finished reviewing, click Done.

In order to provide ratings, select the number of stars you feel the employee has earned for each competency. If the employee has submitted a self-evaluation, you can see the amount of stars the employee gave themselves. If applicable, you will also see the Participant rating.
When finished rating the individual competencies and entering comments as desired, click **Save** in the top right corner of the page.

A Confirmation popup will appear. Click **OK**.

**Step Eight**
Rate the employee’s goals.

- On the left side of the page, there are boxes labeled Competencies,Goals, and Overall Summary. Click the **grey triangle** next to the Goals box.
- The goals page will then display.

- If you click the blue information icon next to the goals, a popup should appear that gives the goal definition and explains the rating model definitions related to the star scale. When finished reviewing, click Done.
In order to provide ratings, select the number of stars you feel the employee has earned for each goal. If the employee has submitted a self-evaluation, you can see the amount of stars the employee gave themselves. If applicable, you will also see the Participant rating.

When finished rating the individual competencies and entering comments, click Save in the top right corner of the page.

A Confirmation popup will appear. Click OK.
Step Nine
Complete the overall summary.

- On the left side of the page, there are boxes labeled Competencies, Goals, and Overall Summary. Click the grey triangle next to the Overall Summary box.

- The Overall Summary page should display.
The Overall Summary rating will automatically be calculated from the average of the Competencies and Goals sections. The only way to change this rating is to adjust the individual ratings in the Competencies and Goals sections. You can change the overall section weights to adjust the calculation, as long as the adjusted weights still add up to 100%. The default section weights Competencies at 50% and Goals at 50%, but this can be adjusted as desired.

**Step Ten**
Save and submit the Supervisor evaluation.
- When finished with the Overall Summary section, scroll to the top of the page and click **Save** in the top right corner of the page.
- A Confirmation popup should display. Click **OK**.
- Click **Submit** in the top right corner of the page.
A Warning window will display. Click Yes.

A Confirmation popup will display. Click OK.

**Step Eleven**

Review and Edit Performance Document.

- Go to Navigator > My Team > **Performance**.
The My Manager Evaluations Team Performance page will display.

Choose the employees document you wish to review and click the Grey arrow next to the Performance document you want to open.
Click **View** next to Conduct Supervisor Evaluation.

The Performance Document will reappear and the supervisor will be able to edit ratings/comments as needed.

**Note:** Since the document is open for editing, it is highly suggested that at this point you print document and have an in-person review with the direct report. This is because the Performance Document is open for editing, and you can “Return to worker” if the direct report wishes to make changes or add comments. Once In-Person review is conducted and no further editing is required proceed to **Step Twelve Share Performance Document**. Recording and Confirming the In-Person Review will happen later in **Step Thirteen**.

To Print Document click the **Print Icon** in the upper right hand corner.

Click **Submit** in the top right corner of the page.

A Warning window will display. Click **Yes**.
A Confirmation popup will display. Click OK.

Step Twelve
Share Performance Document with Employee

- Go to Navigator > My Team > Performance.

The My Manager Evaluations Team Performance page will display.
Choose the employees document you wish to review and click the **Grey arrow** next to the Performance document you want to open.

Click the **grey arrow** next to “Staff Annual Evaluation 2018”. Then, click **Begin** next to Share Performance Document.

The Staff Annual Evaluation page will display.
Review the Competencies section, Goals section, and Overall Summary section pages to ensure that you have given the proper ratings and comments to everything.

If for any reason you realize you want to make an edit, click the Cancel button and return to Step Eleven Review and Edit Performance Document.

To share the performance document, click the triangle next to Share and Release.

Note: When Sharing the performance Document you are provided with two options:
1. Share and Release by clicking Share and Release you will share the performance document with the direct report moving the evaluation process forward. However you will not be able to do any further editing of the document without contacting a Human Resources representative. You will have to click Share and Release to move the document forward in the evaluation process.

2. Share and Retain, allows the supervisor to share a digital copy of the document for the direct report to view. This allows the supervisor to retain the ability to edit and make updates and corrections. The evaluation process will not move forward however until you click Share and Release. After clicking share and Retain return to Step Eleven to make edits and corrections.

The Share and Retain popup will display.

Note: Anything that is entered into this popup is NOT attached to the Performance Document. This popup is to “customize” the notification that is sent to the employee.
Click **OK** in the Confirmation window.

Now you need to confirm the date in the system that an in-person review meeting was held to discuss the performance evaluation.

**Step Thirteen**

Confirm review meeting.

- Click the **grey arrow** next to “Staff Annual Evaluation 2018”. Then click **Begin** next to Confirm Review Meeting Held.

A Warning popup will display. Enter the date the review meeting will be held by either typing in the date **MM/DD/YYYY**, or by clicking on the **grey time/calendar icon**.
When the correct date is entered, click **Yes**.

![Warning]

The application will record that the meeting was conducted. Do you want to continue? (HRA-980180)

- Meeting Held Date: 7/30/2018

![Yes No]

Click **OK** in the confirmation window.

![Confirmation]

The review meeting was recorded as held.

**Note:** It is now the Direct Report's turn to review the meeting date. The Performance Document will not move to the next task, **Next Level Supervisors Approval**, until the direct report confirms that the review meeting was held.

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**Step Fourteen**

**Next Level Supervisors Approval.**

![Stop]

**Note:** The Performance Document is not considered complete until the document has been reviewed and Approved by the Next Level Supervisor.

- Once the supervisor receives the notification that the employee has acknowledged the performance document the Next Level Supervisor task will open allowing you to click **Begin**
- Click **Begin** next to the Evaluation Task Next Level Supervisor Approval.
Note: The Direct Supervisor must coordinate with the Next Level supervisor to ensure Performance Document Completion.

- The task Next Level Supervisor will say “In Progress” until the Next Level Supervisor approves the Evaluation.

- The Next Level Supervisor will receive a notification for approval and may either approve or reject the document.

Note: If the Next Level Supervisor Approves the Document the process will Complete and there are no further steps. If the document is rejected evaluation will return to task Conduct Supervisor Evaluation. The supervisor will receive notification if the document is approved or rejected.

You have completed the steps for completing a Staff Evaluation.