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

**Note:** The Administrative Evaluation is created by starts with the employee (ratee) accomplishing a self-evaluation questionnaire and rating their competencies and goals.

**Note:** The below steps will cover supervisor step the evaluation process starting after the supervisor receives notification that the employee (ratee) has submitted their Self-Evaluation.

This Quick Reference guide will cover the following steps:
1. Navigating to Performance Documents
2. Conducting supervisor evaluation
3. Sharing the Performance Document
   a. Share and Release
   b. Share and Retain
4. Confirming the Review Meeting was held
5. Providing Final Feedback
6. Performance Document Approval

**Step One**
Navigating to Performance Documents.
- **Click on the Navigator in the upper left corner of the page.**
- The navigation menu will display. Click on **Performance** under **My Team**.

- The **My Manager Evaluations** page will display.

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

Conducting supervisor evaluation.

- Click the **grey triangle** next to the *Administrative Evaluation [Year]*.
- This will open the Evaluation’s Task Menu
- Then select **Begin** next to the task **Conduct Supervisor Review**

**Note:** The supervisor will not be able to click begin or access the document until the employee (ratee) completes their self-evaluation.

**Note:** Manage Participant feedback is an optional step where the supervisor may add a participant to the evaluation to provide feedback on the employee (ratee). See the [Add Participant QRG](#) for full details.

- The **Employee’s Administrative Evaluation** page will display on the Self Evaluation tab.
- Review the employee’s **Self-Evaluation questionnaire** then click the **Competencies** tab on the right hand side of the Evaluation’s page.

- The **Competencies** page will display.
- Rate employee’s competencies by clicking on the **stars** to the right of **Manager**.
- Click the blue information icon next to the competencies, a popup appears that gives the competency definition and explains the rating model definitions related to the star scale.
- Click Done to return to the main rating page.

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.

- To add comments click the Comments Icon next to the ratings.
- A comment box will display below the competency.
- To view any comments the employee added, click Worker Comments.
- To hide the comment box, click Hide Comments.

![Diagram showing comment section and rating scales]

- When a comment has been successfully added, the icon will be colored in, versus a grey outline.
- Once you entered all ratings for Competencies, click the grey triangle next to the Goals box.

The Goals page will display:

**Note:** Goals are pulled from the employee’s Performance Goal Plan for the corresponding Evaluation’s Review Period. To add future goals add them to the Goal Plan for the correct review period. **Example:** Employee goals for the 2019 Review Period would go on the 2019 Performance Goal Plan, under the Goal Module.
- Select the **number of stars** you feel the employee has earned for each goal.

![Image](image.png)

**Note:** Another way to see Participant’s evaluation is to click on the number hyperlink button that is in parenthesis. This number corresponds to the number of participants that submitted evaluations.

- To add *Manager comments* click the **comment box icon**.

![Image](image.png)

- When a comment has been successfully added, the icon will be colored in, versus a grey outline.

![Image](image.png)
- Once you have finished adding ratings and comments click on the **Overall Summary Tab**.

- The **Overall Summary** page will display.
The **Overall Summary** rating will automatically be calculated from the average of the **Competencies** and **Goals** sections.

- Click the **arrow** next to **Section Weights**.

- The section weights will display.
- Here you can adjust section weights by clicking the **up and down arrow** next to the section names.

- To get the score, click on the **calculator** icon in the box at the top of the page next to **Calculated Rating**. You may also enter a comment in the **Worker Comments** section.
• Click the Submit button in the top right corner of the page.

• A Confirmation page will open. Click OK.
Step Three
Share Performance Document.

- Click the grey arrow next to Administrative Evaluation, this will open the Evaluation Task Menu then, click Begin next to Share Performance Document.

- The Administrative 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 Cancel and return to Step Two Conduct Performance Evaluation.

- 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 in the task menu. 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 evaluation task menu.

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 on the task menu until you click Share and **Release**. After clicking share and **Retain** return to **Step Two** to make edits and corrections.

- **To move the evaluation forward click Share and Release.**

- **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 Four

Confirm Review Meeting Held.

- From the Administrative Evaluation Task Menu, 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**.

Click **OK** in the confirmation window.

**Note:** It is now the Direct Report’s (employee) turn to review the meeting date. The Performance Document will not move to the next task, *Provide Final Feedback*, until the direct report acknowledges that the review meeting was held and provides Final Feedback.

**Step Five**

Provide Final Feedback.

**Note:** You will receive notifications that the employee has acknowledged that the review meeting was held and when they employee has provided their final feedback. The supervisor will not be able to provide final feedback until the employee has submitted their final feedback.

- From the Administrative Evaluation Task Menu, click **Begin** next to *Provide Final Feedback*. 
- The Employee Acknowledgement & Final Feedback page will display.

![Image](Employee Acknowledgement & Final Feedback)

- Review employee comments and provide final comments in the **Supervisor final feedback text box**.

![Image](Supervisor Final Feedback)

- **Note**: At any time you need to leave the document but still have editing to accomplish click Save in the upper right hand corner. All progress will be saved and you can return to your work later.

- Once finished entering comments click **Submit**.
- You will receive a pop-up window, Click **OK**.

![Image](Confirmation)
Step Six
Next Level Supervisor Approval.

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

- After submitting *Final Feedback* the task *Next Level Supervisor* task will open allowing you to click **Begin**
- Click **Begin** next to *Performance Document Approval*.

- 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, the 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 an Administrative Evaluation.