Add Performance Evaluation Participant

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

**Note:** Adding a Participant is an optional process that allows the supervisor to gain crucial feedback on the Direct Reports Performance. Documents filled out by Participants will generate an overall score but score will not factor into the Supervisor's final rating. This process provides feedback only.

**Note:** Participants must be in a supervisory position and have completed Performance Management Training prior to being added as a participant. Examples of Participants are but not limited to:
1. A previous supervisor that had direct supervision over your direct report during the Review Period.
2. A shift supervisor that regularly assigns your direct report tasks and observes their performance.
3. A Business Manager that regularly works with or assigns your direct report tasks and can provide feedback on their quality of work.

**Note:** Work related peers should not be used as participants. Only employees with a supervisory responsibility over your direct report should be included.

**Step One**
- Click the **Navigator** bar.
To find Performance go to: Navigator > My Team > Performance

This will take you to the My Manager Evaluations: [Insert Year] Annual review Period Team Performance page.

Make sure the review period is the correct period. If not, click on the grey triangle icon at the top to select the “[Year] Annual Review Period”.
Step Two

**Note:** Managing Participant feedback is optional and is only used if desired. The Supervisor can always move ahead to the “Conduct Supervisor Evaluation” step after the Employee Conducts the Self Evaluation. Once the supervisor Shares and releases the document a Participant can no longer be added.

- Click the grey triangle next to *Staff Annual Evaluation [Year]* to reveal the steps in the process. You should see the first two steps of the process greyed out with a green check mark, showing they are completed.
- Click **Begin** next to Manage Participant Feedback.

The Annual Evaluation Feedback Requests page will display.
To add a participant, click the **plus icon (†)** next to Add Participants.

Options will display. You may choose to add Peers, Matrix Manager, Direct Reports, Recent, or you may search.

- **Note:** If you click **Add Peers**, this will populate a list of the supervisor’s other direct reports, or the rest of the supervisor’s team. *(Not Recommended)*
- If you click **Add Matrix Managers**, if the employee has matrix managers assigned to them in Person Management, they would appear in a list. Otherwise, this will be blank.
- If you click **Add Direct Reports**, this will populate the direct reports that report to the employee being evaluated. This would only be applicable if the employee being evaluated is a supervisor. *(Not Recommended)*
- If you click **Add Recent**, this will populate a list of employees that were recently added as participants. This would be useful if, for example, you are adding the same business manager as a participant on all of your evaluations of the direct reports on your team.
Note: Work related peers and direct report should not be used as participants. Only employees with a supervisory responsibility over your direct report should be included.

- To search for anyone within the University of Wyoming, choose **Search**.

  The **Search and Select: Participants** popup will display.
  Enter the name of the person you would like to participate in the evaluation and then click **Search**.

  Note: Two asterisks (**) means that at least one (but not all) of those fields are required. In this case, you are required to enter at least a name, job, e-mail, or person number before searching.
- The name will display.
- Choose **Additional Supervisor** in the *Role dropdown* and click **Add**.

![Image of the search and select participants interface with the Additional Supervisor role selected.]

- The Add button will change to **Added**.
- If desired you may search and select another participant, and add as many as you want to the performance evaluation. When done, click the X icon in the top right corner.

![Image of the search and select participants interface with the participant added.]

- The participant(s) will now be displayed in the *Feedback Requests* region.
Note: If a participant was added to an evaluation by accident, they can be deleted before a request is sent out. They also can be deleted after a request was sent out, so long as the participant doesn’t start the evaluation to make it in progress or submit the completed evaluation. To delete a participant, click the X icon in the participant’s row.

- A warning message will appear.
- Click Yes.

Warning
The selected participant will be removed. Do you want to continue? (HRA-960402)

- The Participant will disappear from the Feedback Request region.

Note: simply adding a participant to the Feedback Requests region does not notify the participant yet. In order to invite the participant to fill out an evaluation, you must click the “Send Request” button (under the Status column).

- When ready to notify the participant of your request for feedback, click Send Request.
The *Send Request* popup will appear.

*Entering a due date is required.* Enter any future date that you need the feedback to be done and submitted. You can do this by either typing in the date in a MM/DD/YYYY format, or by clicking on the **Grey Calendar and Clock Icon** (circled below) and choosing a future date.

After selecting a due date, enter a message that the participant will receive (i.e. Please provide feedback on the employee’s performance). Click **OK**.
- A Confirmation popup will display.
- Click OK.

- The status will have a blue circle indicating pending feedback.
- You can use the resend button to resend the request for feedback to the participant.
- Click Done.

- Now, it is the participant's turn to provide feedback and complete their evaluation of the employee in the performance document.

This completes the process to add participants in performance evaluations.