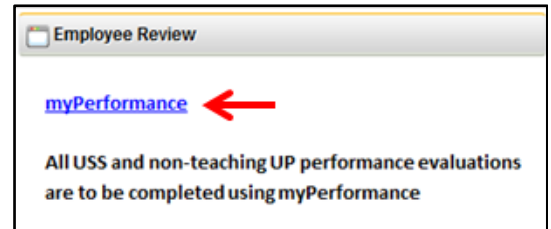


In the Manager role, you will be completing either an Annual evaluation or a USS New Employee/Position evaluation. Evaluations for a New USS Employee/Position will be a 12-month probationary evaluation. The following manager directions are for all annual and probationary evaluations. Any specific instructions for a specific type of evaluation will be noted in these instructions.

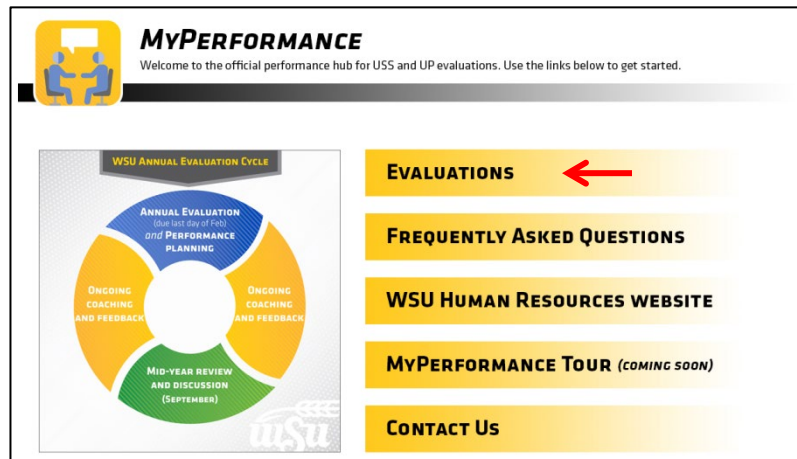
Login to myPerformance

1. Login to myWSU **Faculty/Staff** page with your myWSU ID and password.
2. Select [myPerformance](#) in the Employee Review box.

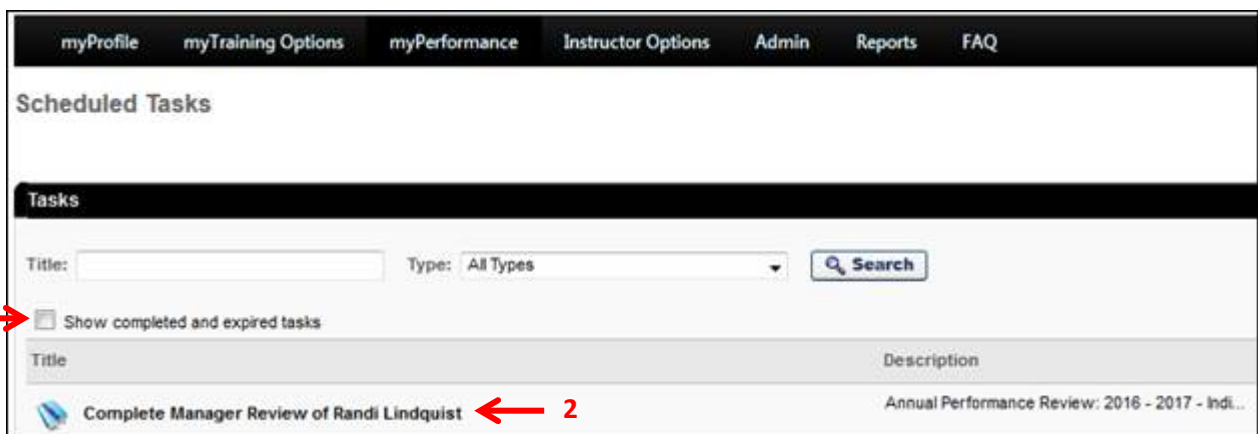


Select the Review

1. Select the Evaluations link.




2. To access an employee's evaluation before first submission in a step, select the evaluation in the **Tasks** list.
3. To access an employee's evaluation if you have already submitted information into it previously, check the box for "Show completed and expired tasks", then select the employee evaluation in the **Tasks** list.



STEP ONE – PLANNING AND MID-REVIEW

The first step of the review process is Planning and Mid-Review. During Planning, the manager inputs expectations for competencies and goals at the beginning of the new review period and meets with the employee to communicate expectations. To complete a Mid-Review, the manager inputs comments about the employee's progress for competencies and goals and meets with the employee to communicate mid-review status. The manager can add comments and notes to competencies and goals throughout the time assigned to Step 1.

The Overview page shows the employee's name, position, date of evaluation, and an overview of the process for the type of review being completed.



Employee Name
Position
3/1/2017 - 2/28/2018

0%

Overview

Welcome to the 2017-2018 Performance Review!

This review cycle starts on March 1, 2017 and ends on February 28, 2018.

The due dates for each step are as follows:

Manager Planning and Mid-Review Documentation: March 1, 2017- January 15, 2018
The manager submits expectations for new review period including competencies and goals and meets with employee to communicate expectations in March and again for Mid-Review in September. The manager may then submit comments and notes to competencies and goals throughout the review cycle before the January 15th deadline.

Employee Self-Evaluation: January 16-January 31, 2018
The employee completes a self-evaluation. This allows the employee to provide comments and notes on job performance and accomplishments. This step is optional and if the self-evaluation is not submitted by January 31st, it will automatically route to the manager for the next step.

Manager Evaluation: February 1-February 28, 2018
The manager submits summary comments for competencies and goals and must select ratings for all competencies. The manager then meets with the employee to discuss all sections of the evaluation and the overall rating before the last day of February.

Employee Signature: March 1-March 7, 2018
The employee reviews the evaluation, adds comments, and electronically signs showing they have received the evaluation.

Manager Signature: March 8-March 14, 2018
The manager reviews the employee comments, makes any needed additional comments, and electronically signs showing their approval of completion. The completed evaluation will be automatically forwarded to Human Resources. The completed evaluation will also be accessible to the Manager and Employee in myPerformance.

For step-by-step instructions on how to complete the steps in myPerformance, [please refer to myPerformance Quick Reference Guides for Employee, Manager, and Indirect Manager.](#)

For questions regarding the myPerformance software or process, [contact the Performance Management team.](#)

For more information on USS and non-teaching UP evaluations and FAQs, [please refer to Performance Evaluations information page.](#)

For live instruction, myPerformance training classes are regularly scheduled. Please register through myTraining in [myWSU](#).
HR is here to help!

Review Step Progression

The Overview screen also shows a review of the Step Progression and highlights the current step. A side bar shows your progression through the current step. Click the **Get Started** button.



Overview

- Individual Contributo...
- Goals Planning
- Summary
- Goals Final Review
- Approval Signature

Review Step Progression

✓	Planning and Mid-Review	✓	Planning and Mid-Review: Indirect Mgr View	✓
✓	Employee Self-Evaluation	✓	Employee Self-Evaluation: Indirect Mgr View	✓
✓	Manager Review	✓	Manager Review: Indirect Mgr View	✓
✓	Employee Signature	✓	Employee Signature: Indirect Mgr View	✓
✓	Manager Signature	✓	Manager Signature: Indirect Mgr View	✓

Get Started

Competencies

All employees are evaluated on competencies aligned with the University's Strategic Plan and the employee's position knowledge. There are six core competencies. Managers and Budget Officers/Budget Review Officers have additional competencies.

When completing this section, the manager should provide specific examples of work expected that demonstrate how the competency would be rated. Job duties from the employee's position description should be tied to the competencies. These examples should be added in the Comment box that appear under each competency.

Managers can make multiple entries in the Comments box during the time assigned to Step 1. This will include comments documenting mid-evaluation progress and discussion with the employee. Managers may include additional comments such as foreseen barriers, changes, or amendments.

Each competency will have the definition with examples. Add comments in the open text box. When finished with all Competencies, click **Save and Continue** at the bottom of the Competencies page.

Teamwork

Works cooperatively and effectively with others to achieve common goals. Participates in building a group identity characterized by pride, trust and commitment.

- Reports to work at the assigned time, workstation, and remains at work until the end of the scheduled work day/shift.
- Provides timely notification to supervisor of tardiness or absence.
- Deals honestly and fairly with others, showing consideration and respect for individual differences.
- Does own fair share of the work.
- Seeks assistance from other team members, as needed.
- Assists other team members.
- Shares all relevant information with others.
- Initiates collaboration with others.
- Seeks input from other team members on matters that affect them.
- Assumes additional responsibilities to facilitate the achievement of team goals.
- Makes outstanding efforts to help other team members.
- Fosters team spirit.

Comments:

B I S U [List of icons]

Back Save and Exit **Save and Continue**

Goals Planning and Review

This section is optional and will not be weighed or rated during the end of the review period.

You may have additional goals that need added to the employee's evaluation for development and/or documentation. Some examples include:

- For specifics in helping an employee "fix" a weakness in their position knowledge
- To help an employee develop to the next level
- To let the employee choose their own goals for self-development
- For work on a specific project

Managers can input goals during *planning* or at various times throughout *Step 1*. To add goals, follow the steps below. If you have no goals to enter, click **Save and Continue** to skip this section.

1. Type the title of your first goal into the text box labeled **Goal 1: Title**.
2. Type a description of the goal into the text box labeled **Goal 1: Description**.
3. Select the due date for the goal in the box labeled **Goal 1: Due Date**.
4. If you have additional goals, continue typing them into the *Goal 2*, *Goal 3*, *Goal 4*, or *Goal 5* boxes.
5. If you have more than 5 additional goals on an evaluation, please contact Human Resources for assistance with modifying the employee's *Position Description* to accommodate this situation.
6. Click **Save and Continue**.

Goals Planning and Review

Employee goals are optional. The purpose of adding goals is to ensure documentation and tracking within myPerformance, however goals have no weight in the overall evaluation rating. Goals should be developed to manage or support work and be clearly tied to at least one of the employee's competencies. Managers and employees should meet to discuss and adjust goals throughout the performance cycle. For further guidance, please register for a myPerformance Training through myTraining.

Goal 1: Title

Develop and

Goal 1: Description

Complete all development and testing for myPerformance. Develop and roll-out training. Launch myPerformance Live on March 1. Continue to monitor and update myPerformance during March,

Goal 1: Due Date

3/1/2016

To add additional comments to goals during *Step 1* and *Step 3*, please enter comments in the **Comments** box for the goal on the lower half of the *Comments* page.

Comments: Goal 1

Comments:

February 18 - Randi is progressing very well on her goal. She has been focused on managing issues arising during the development. The project is still on schedule to launch March 1.

Additional Comments

To add general comments during *Step 1* and *Step 3*, please enter comments in the **Additional Comments** box. These are summary discussion points for the overall evaluation.

Additional Comments


Summary discussion points may include employee's strengths, areas for development and additional evaluation comments.

Comments:


Summary

The Summary section will have no content until Step 3. **YOU MUST CLICK THE Submit BUTTON.**

Summary

Overall Rating 
N/A

	Manager Review
Individual Contributor Competencies	-
Goals Planning and Review	-
Additional Comments	-

Overall 

****Managers should follow these same instructions above to access the employee's evaluation anytime during Step 1 of the evaluation period to add additional comments, edit existing comments, and ensure employee progress on competencies and goals is well documented. On the due date for Step 1, the review will advance to the employee to complete Step 2- Employee Self-Evaluation. This is an optional step for the employee to complete. The evaluation will return to the manager to complete Step 3 – Manager Review.**

Options

Managers will have various options available in the Options menu during Steps 1, 3, 5.

Annual Performance Review:

Options may include:

Add Co-Planner

Manager can add a co-planner who may have supervised the employee during work on a project or temporary work in another department.

Attachments

Manager can add up to three attachments such as a position description.

Print Review

Manager can print a copy showing all comments currently entered into the review.

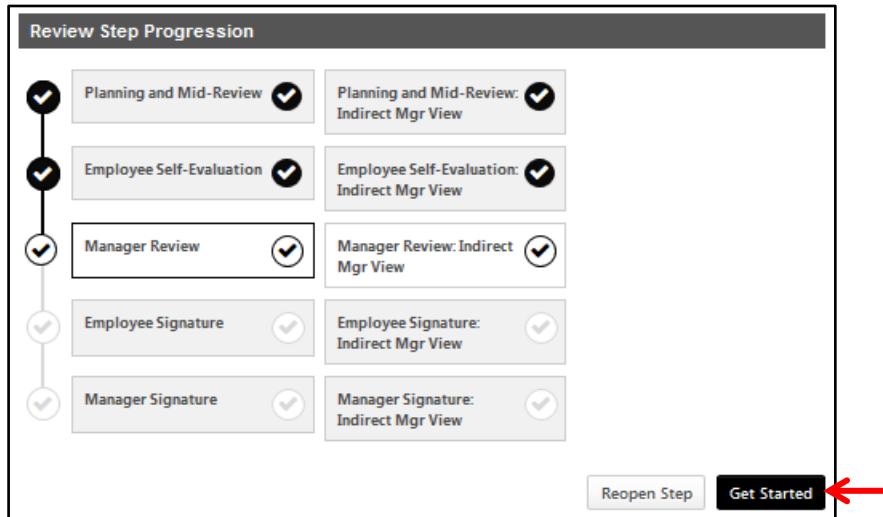
STEP THREE – MANAGER REVIEW

During the Manager Review, the manager will rate the employee on Competencies. The manager should review the information submitted by the employee on their Self-Evaluation. (An employee does not have to complete the Self-Evaluation, however if the manager would like to re-open the Self-Evaluation Step for their employee, then that option is presented on the Review Step Progression screen below). The manager should also schedule a review meeting to discuss in-person the comments the manager has added, as well as the ratings that were assigned to the Competencies.

Login through myWSU and access the review (see page 1 for instructions).


Review Step Progression

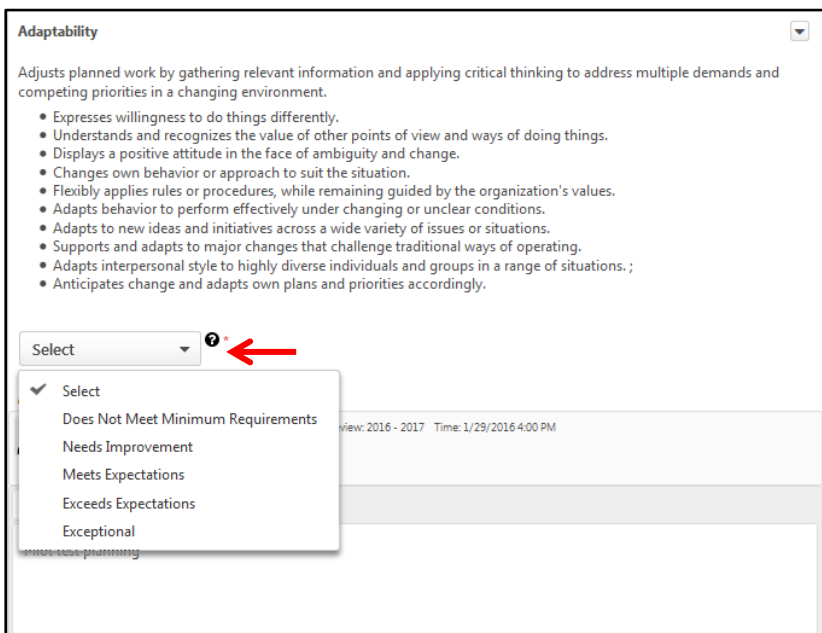
This screen summarizes the review steps for the review period. Choose the **Get Started** button.



Rate Competencies

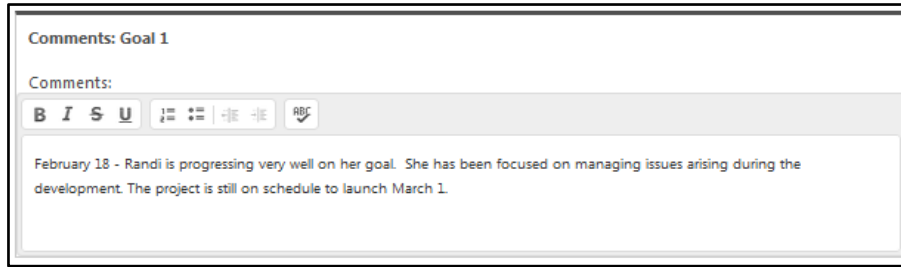
Managers must rate each competency according to the employee's performance throughout the review period.

1. Review comments added by the employee during Step 2 – Self-Evaluation.
2. Click the drop-down menu to select the rating for the first competency. Click  to read the definition of each rating.
3. Add comments to each competency explaining the rating, either positive or negative.
4. Scroll down to the next competency to continue rating.
5. When you are finished with each competency, click **Save and Continue** to advance to the next section.



Goals Planning and Review

This section is optional and will not be weighed or rated during the end of the review period. If you added goals during the Planning or Mid- Review and wish to comment on any goals at this time, a comment box is available in the lower half of the page. Click **Save and Continue** to advance to the next section.



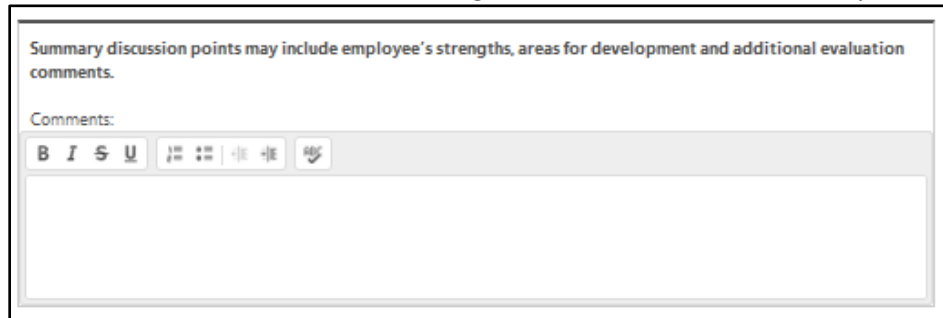
Comments: Goal 1

Comments:

February 18 - Randi is progressing very well on her goal. She has been focused on managing issues arising during the development. The project is still on schedule to launch March 1.

Additional Comments

In the Additional Comments section, the manager will be able to enter summary comments for the overall review period.

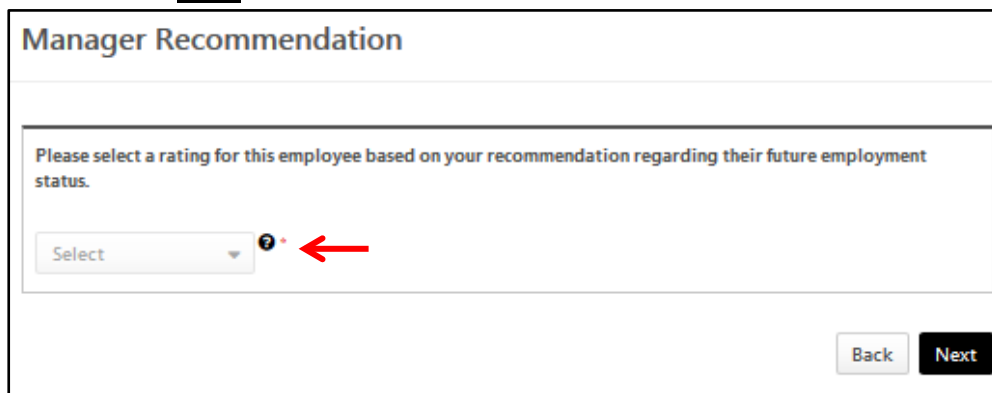


Summary discussion points may include employee's strengths, areas for development and additional evaluation comments.

Comments:

Manager Recommendation (Only on 12-month Probationary Review)

The manager will need to select a recommendation for a 12-month probationary evaluation. Select the appropriate recommendation, click the **Next** button.



Manager Recommendation

Please select a rating for this employee based on your recommendation regarding their future employment status.

Select ?

Back Next

Rating Summary


In the Summary section, the manager will be able to view overall rating calculations after the completion of their ratings. It is also used to print the review or upload attachments at the end of the review period. Click the Options button to print the evaluation, if desired. Otherwise, you may click **Next**.


Overall ratings take weights into consideration, and are automatically calculated by the software:


- The Competencies are weighted equally.
- The Competencies account for 100% of the Overall Rating.


Submit Review

Summary

Overall Rating 

Meets Expectations 

	Manager Review
Individual Contributor Competencies	Meets Expectations
Goals Planning and Review	N/A
Overall 	Meets Expectations



*The review will now advance to Step 4 - Employee Signature for their signature and any additional comments. Once the employee electronically signs and submits the review, the evaluation will return to the manager to complete Step 5 – Manager Signature.

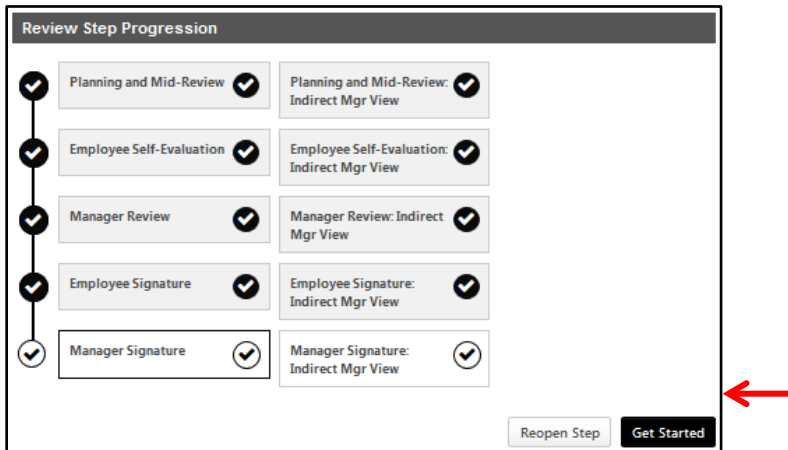
STEP FIVE – MANAGER SIGNATURE

During the Step 5, the manager will be able to view comments from the employee and/or indirect manager after the ratings were assigned. The manager can add additional comments and electronically sign the evaluation.

Login through myWSU and access the review (see page 1 for instructions).

Review Step Progression

This screen summarizes the review steps for the review period. Click the **Get Started** button.



Competencies

This section allows the manager to view previous entries and comments for competencies. These sections are view-only. Click **Next**.

Goals Planning and Review

This section allows the manager to view previous entries and comments for goals. These sections are view-only. Click **Next**.

Employee Comments Review

This section allows the manager to view any comments entered by the employee during Step 4. This section are view-only. Click **Next**.

Summary

In the Summary section, the manager will be able to, once again, view the overall rating calculation. Click **Next**.

Sign the Review

The manager will review any employee comments and add comments if desired. The manager can add additional comments. The manager will electronically sign the evaluation by typing their name into the text box, click the **Sign** button. Once completed with comments and signature, click **Submit**.

The screenshot shows a web form titled "Approval Signature". At the top, there is a disclaimer: "Please review and sign. Signature does not imply agreement with the content of the review. It only indicates the employee's awareness of the information contained herein. If you have concerns about the ratings or comments your manager has provided, please refer to Human Resources for guidance on resolution." Below this, the user information is displayed: "Self", "Anita Barrett", and "Date: 1/29/2016". The "Manager" section contains a text input field labeled "First and last name" and a "Sign" button. A red arrow points to the "Sign" button. Below the input field is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, and Undo. At the bottom of the form, there is a user profile section for "Anita Barrett (Self)" with a "Pilot test" label and a timestamp. At the very bottom, there are three buttons: "Back", "Save and Exit", and "Submit". A red arrow points to the "Submit" button.

Submit Review

A box will appear asking if you are sure you want to continue. Click the **Submit** button.

The screenshot shows a dialog box titled "Submit Review" with a close button (X) in the top right corner. The main text of the dialog reads: "You will not be able to modify once you have submitted. Are you sure that you want to submit now?". At the bottom of the dialog, there are two buttons: "Cancel" and "Submit". A red arrow points to the "Submit" button.