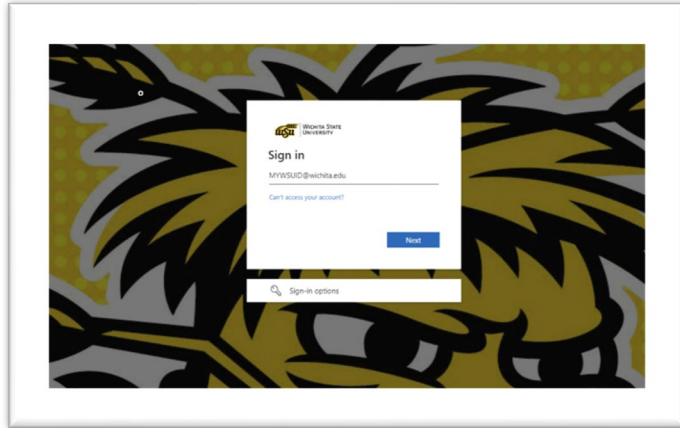


The following instructions are for a Manager completing an annual evaluation for a non-teaching direct report.

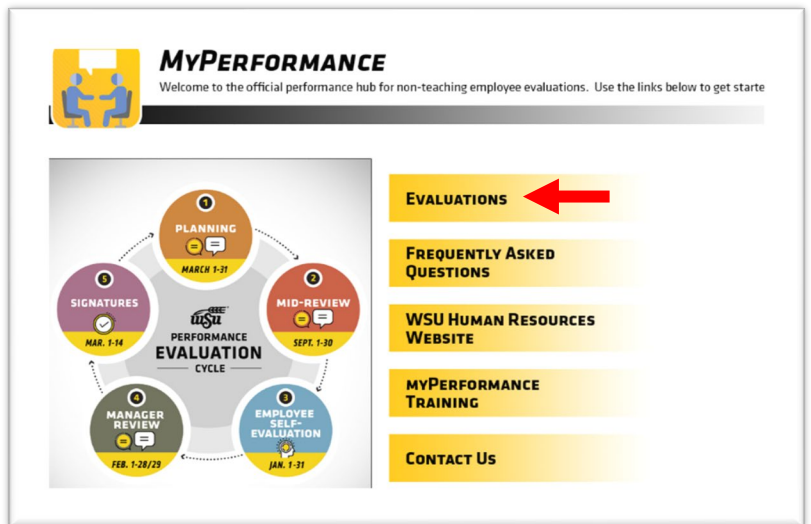
Login to myPerformance

1. Login to [myPerformance](#)

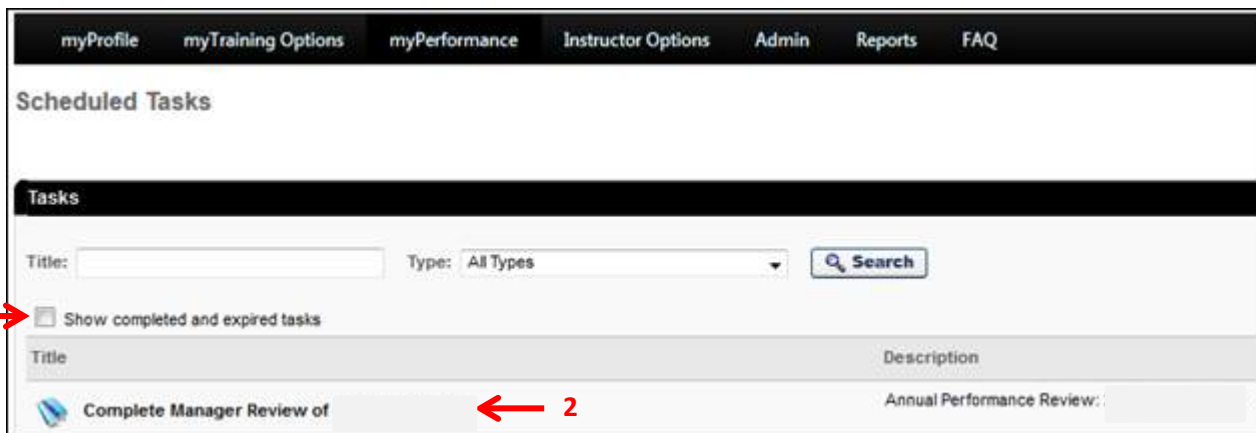


Select the Review

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.

Overview

Welcome to the 2023-2024 Performance Review!

This review cycle starts on March 1, 2023 and ends on February 29, 2024.

The due dates for each step are as follows:

Manager Planning and Mid-Review Documentation: March 1, 2023-December 31, 2023

The manager inputs expectations for new review period including competencies and goals and meets with the employee to communicate expectations in March and again for Mid-Review in September. The manager may then add comments and notes to competencies and goals throughout the review cycle before the December 31st deadline.

Employee Self-Evaluation: January 1-January 31, 2024

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 completed by January 31st, it will automatically route to the manager for the next step.

Manager Evaluation: February 1-February 29, 2024

The manager provides 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 overall rating before the last day of February.

Employee Signature: March 1-March 7, 2024

The employee reviews the evaluation, adds comments, and electronically signs showing they have received the evaluation.

Manager Signature: March 8-March 14, 2024

The manager reviews the employee comments, makes any needed additional comments, and electronically signs showing their approval of completion. The completed evaluation will continue to be accessible to the manager and employee in myPerformance.

- For step-by-step instructions on how to complete the steps in myPerformance or add a co-planner, [please refer to the myPerformance Quick Reference Guides](#).
- For questions regarding the myPerformance software or process, [contact the Performance Management team](#).
- For more information on Non-Teaching evaluations and FAQs, [please refer to the Performance Evaluations information page](#).
- For myPerformance training, please register in myTraining in [myWSU](#).

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.

Review Step Progression

<input checked="" type="checkbox"/>	Planning and Mid-Review <input checked="" type="checkbox"/>	Planning and Mid-Review: Indirect Mgr View <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee Self-Evaluation <input checked="" type="checkbox"/>	Employee Self-Evaluation: Indirect Mgr View <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Manager Review <input checked="" type="checkbox"/>	Manager Review: Indirect Mgr View <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee Signature <input checked="" type="checkbox"/>	Employee Signature: Indirect Mgr View <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Manager Signature <input checked="" type="checkbox"/>	Manager Signature: Indirect Mgr View <input checked="" type="checkbox"/>

Get Started

Overview

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

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.

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 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**.

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 Bulleted] [List Numbered] [List Discarded] [List Discarded] [ABC]

Back Save and Exit 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 ←

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**.

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:

B I S U [List Bulleted] [List Numbered] [Link] [Image] [Undo] [Redo] [ABC]

February 18 - [] 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:

B I U S x₂ x₄ I_x [List Bulleted] [List Numbered] [Link] [Image] [Undo] [Redo] [ABC] Font Size A-

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 ⓘ

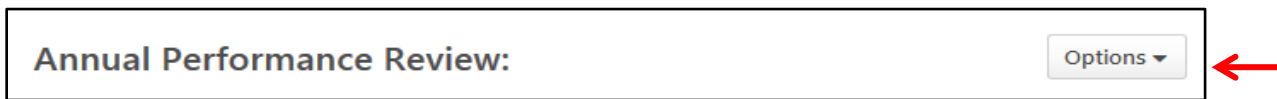
Back **Submit**



****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.



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.

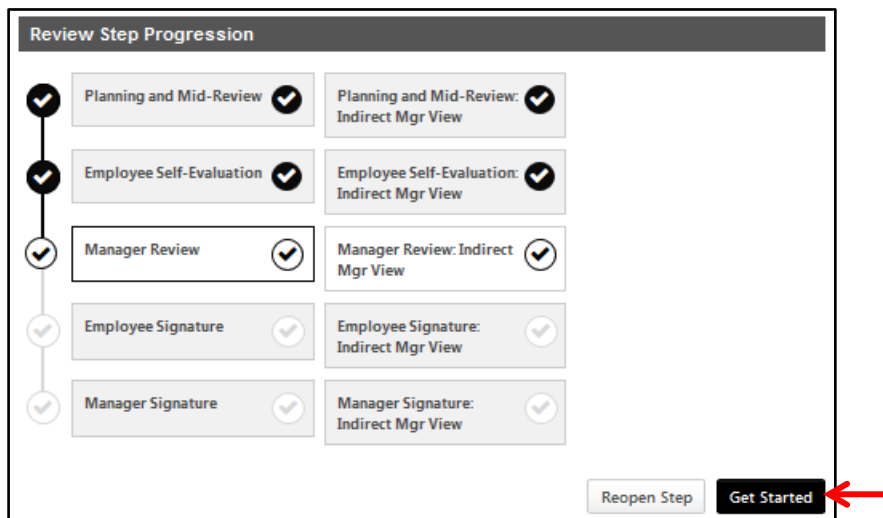
STEP THREE – MANAGER REVIEW

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 the 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.

Adaptability

Adjusts planned work by gathering relevant information and applying critical thinking to address multiple demands and competing priorities in a changing environment.

- Expresses willingness to do things differently.
- Understands and recognizes the value of other points of view and ways of doing things.
- Displays a positive attitude in the face of ambiguity and change.
- Changes own behavior or approach to suit the situation.
- Flexibly applies rules or procedures, while remaining guided by the organization's values.
- Adapts behavior to perform effectively under changing or unclear conditions.
- Adapts to new ideas and initiatives across a wide variety of issues or situations.
- Supports and adapts to major changes that challenge traditional ways of operating.
- Adapts interpersonal style to highly diverse individuals and groups in a range of situations.;
- Anticipates change and adapts own plans and priorities accordingly.

Select

- ✓ Select
- Does Not Meet Minimum Requirements
- Needs Improvement
- Meets Expectations
- Exceeds Expectations
- Exceptional

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:

B I S U [List] [Numbered] [Indent] [Outdent] [Undo]

February 18 - I 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:

B I S U [List] [Numbered] [Indent] [Outdent] [Undo]

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 **100%**

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

Options ▾
Attachments
Employee Details
Print Review

Back Submit

*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.

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 ✓

Reopen Step Get Started

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 manger 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**.

Approval Signature

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.

Self

Manager

First and last name **Sign**

B I U [List Icons] [Undo]

Self: Review: UAT: Annual Performance Review

Pilot test

Back Save and Exit **Submit**

Submit Review

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

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel **Submit**