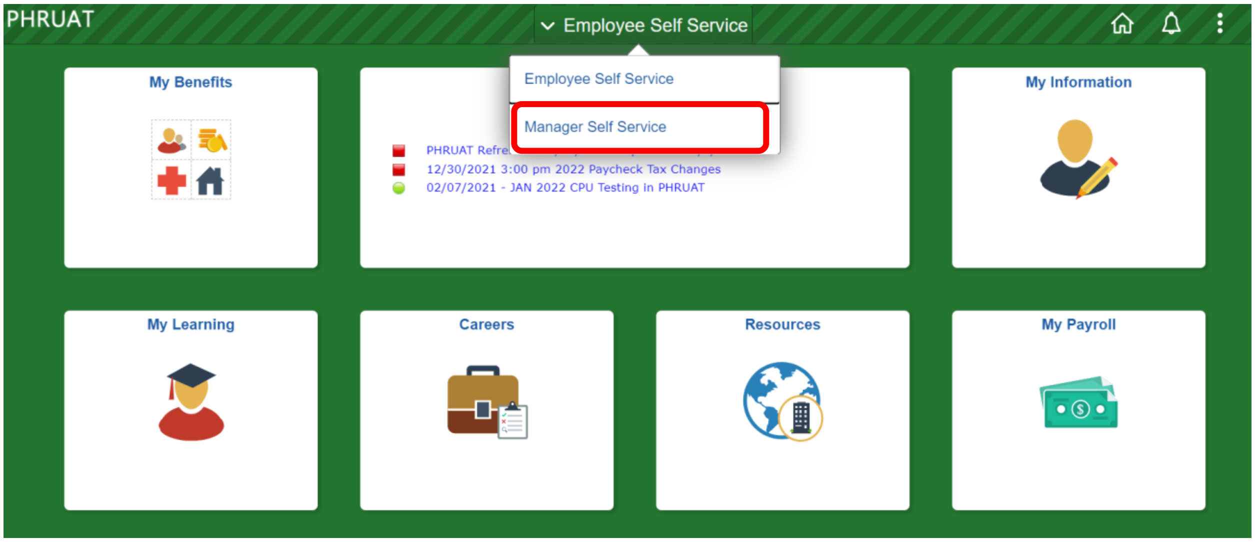
STAR ePerformance Job Aid – Supervisor

Contents

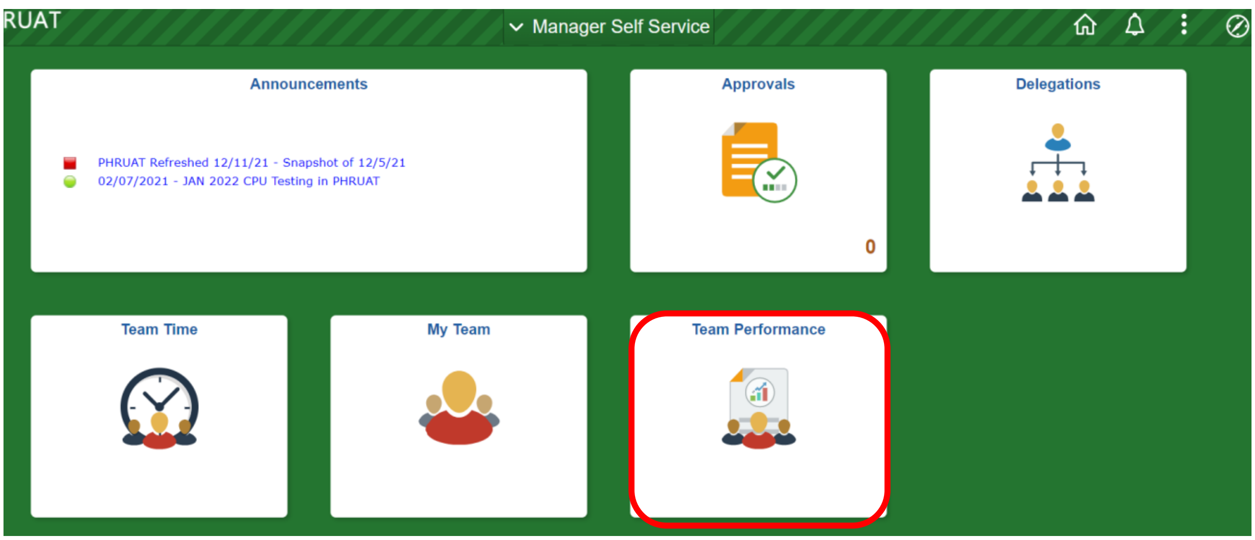
Creating New Performance Documents:

The following steps will guide you through create a Performance Document (review) in PeopleSoft.

1. Log into PeopleSoft and go to the Manager Self Service homepage.

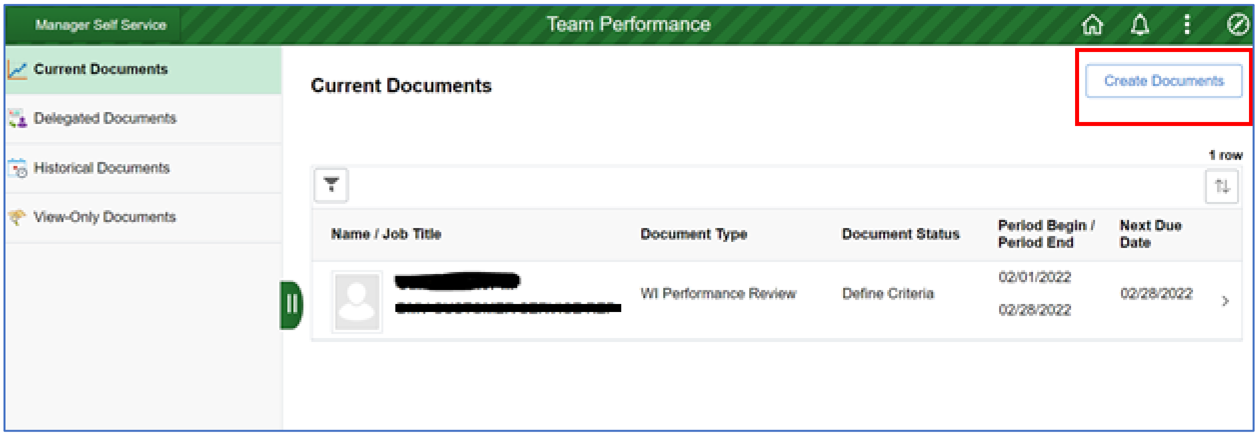


2.) Once on the Manager Self Service homepage, you will notice the “Team Performance” tile. This is how you will create and manage all reviews for your team.

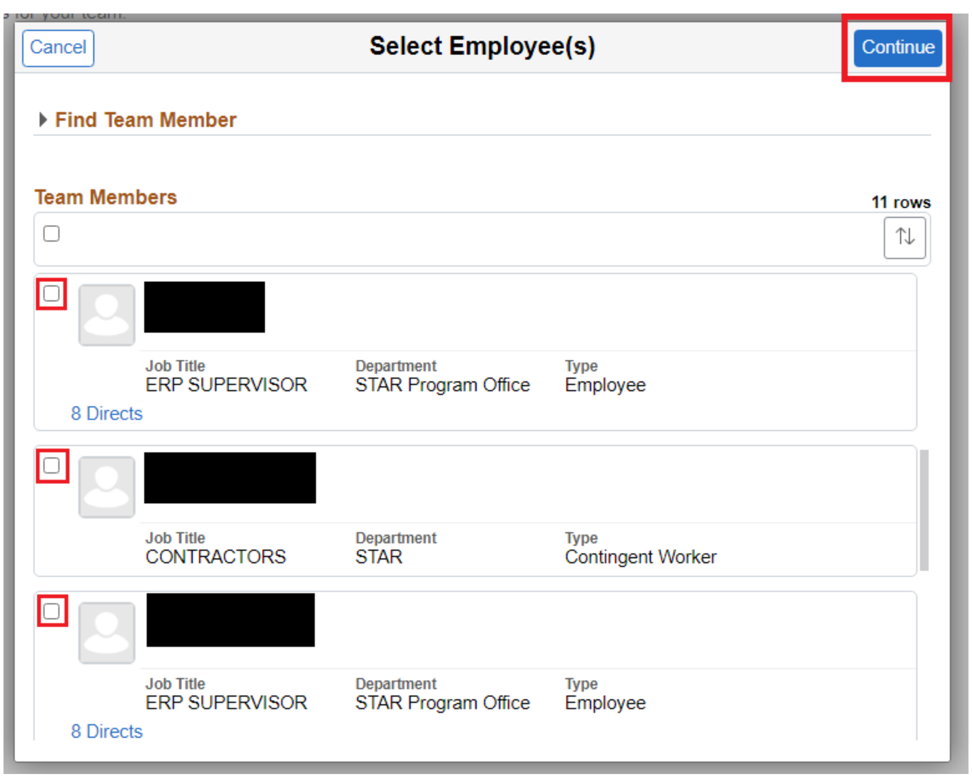


3.) On the “Team Performance” page, you will see some options on the left of the screen. Most often you will be working in the “Current Documents” section, which will show all Performance Reviews currently in progress.

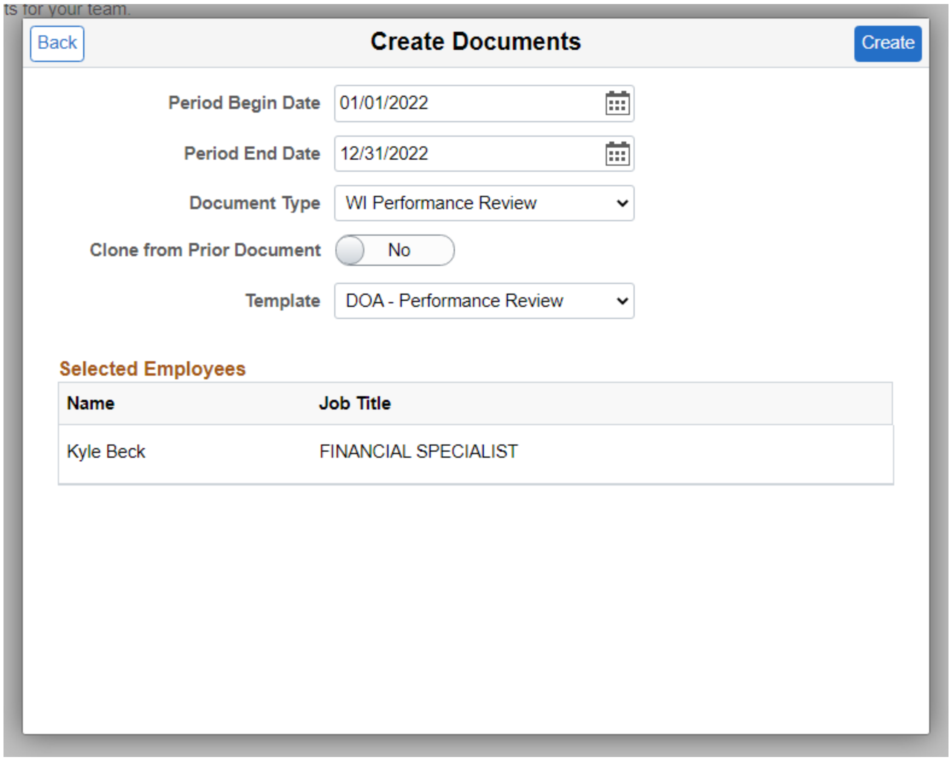
When there are no current documents, the page will display the “Create Documents” button on the main page. Otherwise, the Create Documents can be found in the upper right-hand corner:



4. After clicking the "Create Documents" button, a list of your direct reports will display. Check the box next to the employee (or employees) for whom you wish to create a Performance Review. If creating reviews for multiple employees, all the reviews must be for the same period. When done, click the "Continue" button in the upper right-hand corner to continue:



Once you have selected the employee(s) you wish to review, you will be asked to provide some additional information in order to create the review document.



5. Enter the following information:

a. Period Begin Date

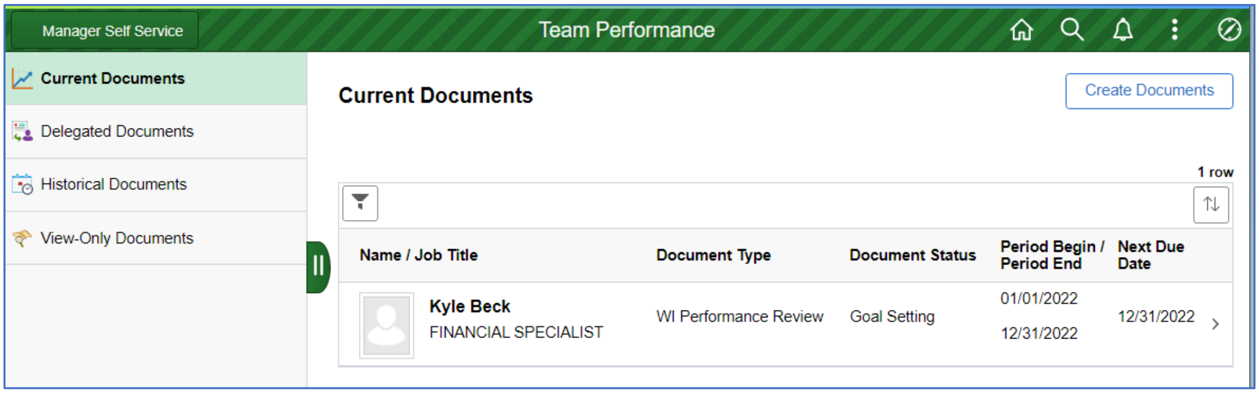
b. Period End Date

c. Document Type → Wisconsin Performance Evaluation

d. Click **Create.**

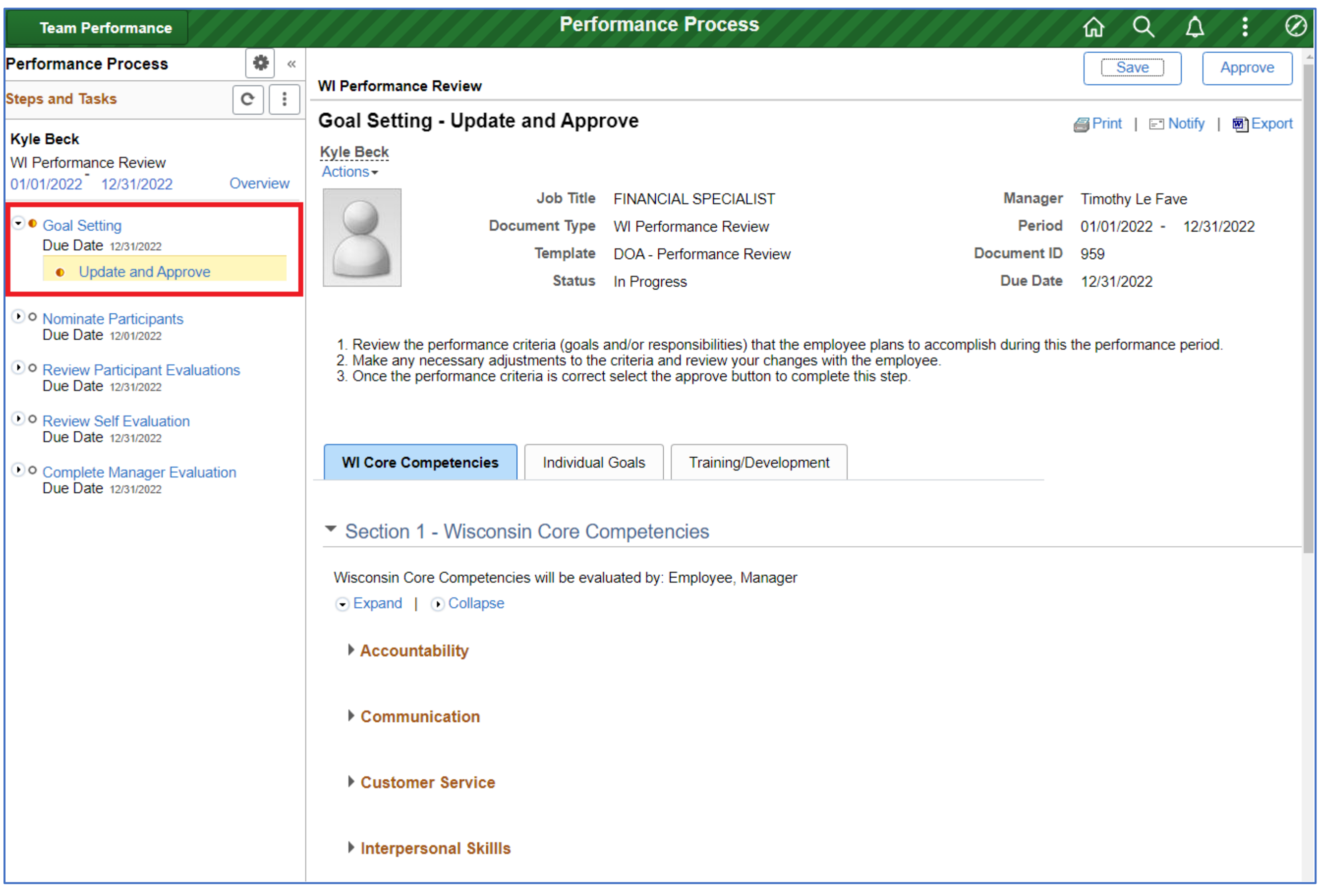
* **Note:** If you wish to copy the goals from a previous review, or another employee's review, you may click the "Clone from Prior Document" slider. Selecting this option will allow you to search for other reviews you have completed.

6. You will be returned to the **Current Documents** page. Note that the current status of the newly created review is "Goal Setting". This status will change as you progress the review toward completion.



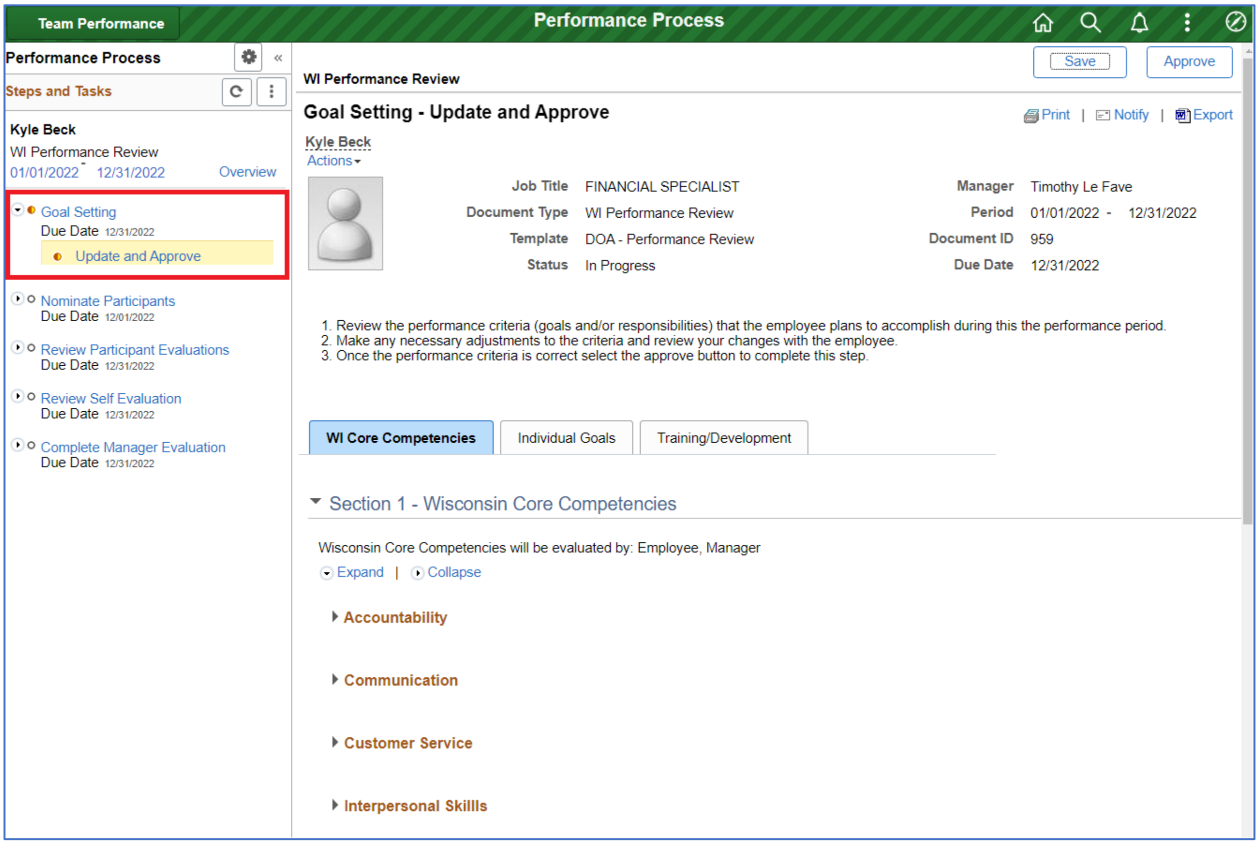
Click anywhere on the row of your employee to begin the **Goal Setting** step of the process.

7. The Performance Review will be displayed at the current step of the process. Because this is a new review, the current step is **Goal Setting.** The left panel of the page will allow you to view the current step, as well as navigate between steps. The steps necessary to complete the review can vary based on your agency's template.



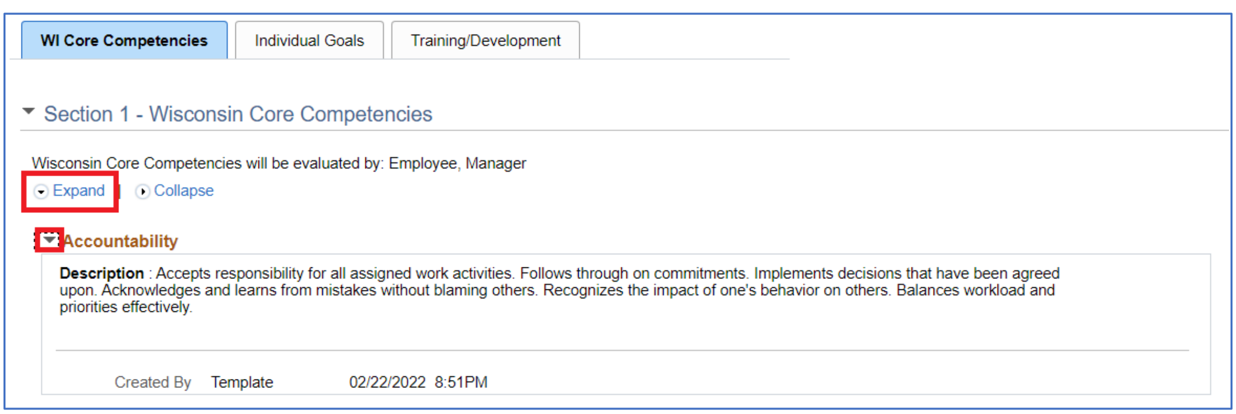
Goal Setting:

Goal Setting is the first step to complete on all Performance Reviews, and will be first step shown after creating a new Performance Review:



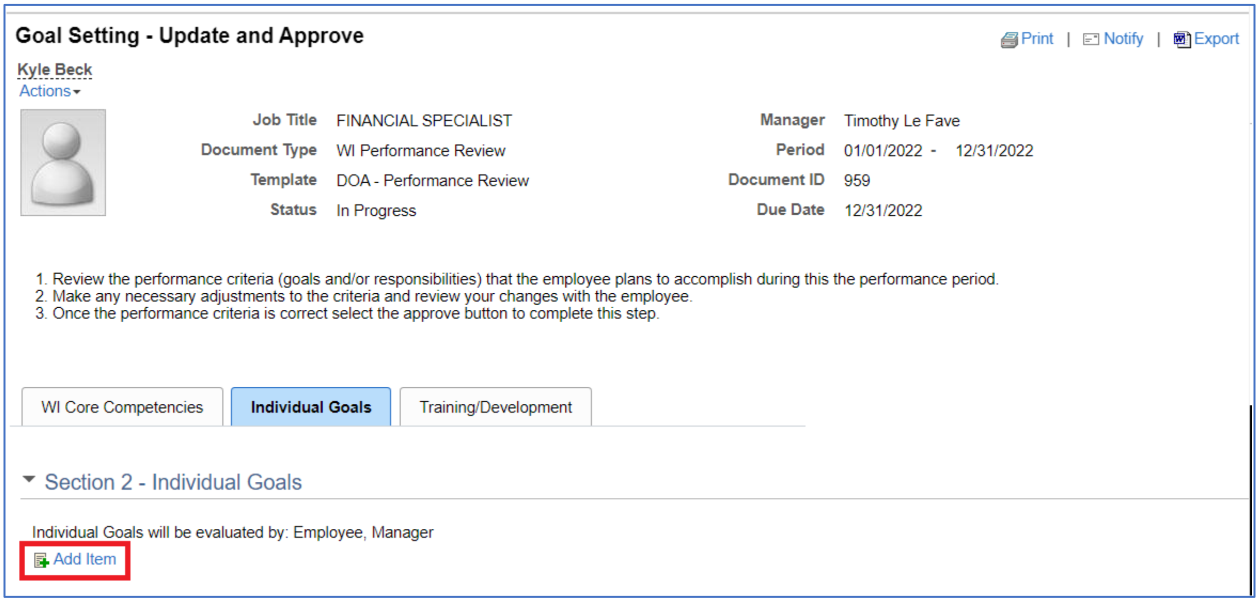
WI Core Competencies

9. The first tab, labeled **WI Core Competencies,** can be used to view the core competencies that are part of all employee reviews. To view the detailed description of each competency, you can click the blue "Expand" link above the first competency. Alternatively, the competencies can be expanded individually by clicking the arrow next to each individual competency.

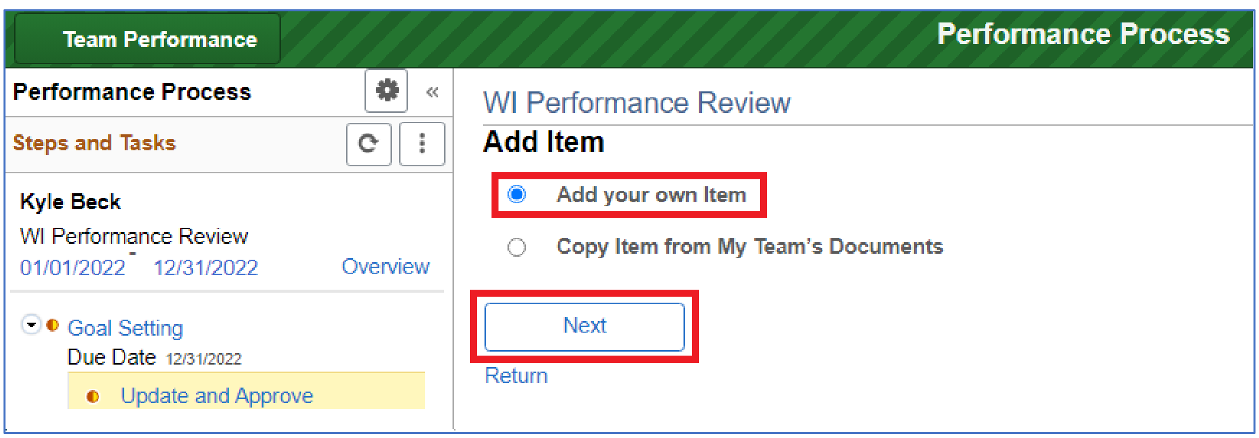


Individual Goals Tab

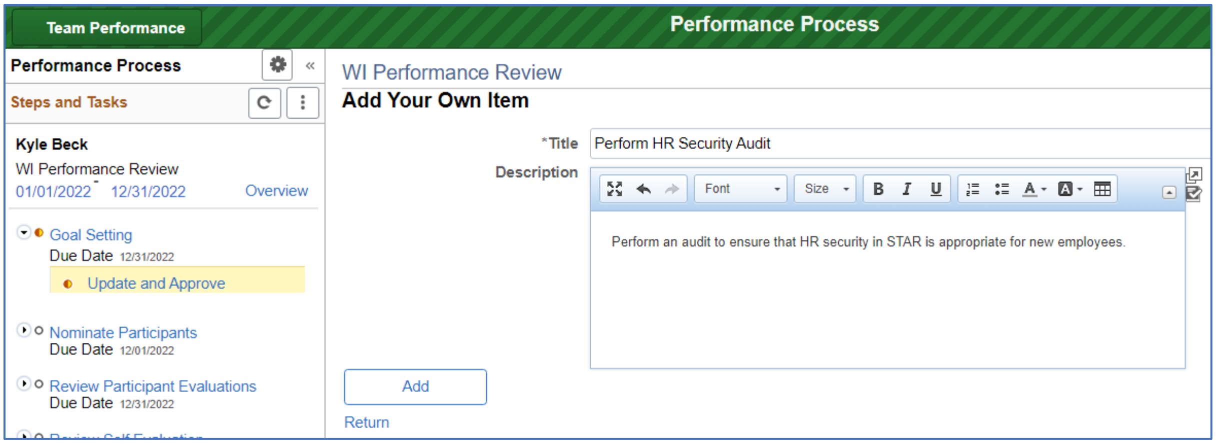
10. On the **Individual Goals** tab, you will need to define the items/set specific goals and expectations for which the employee will be evaluated. Click on **Add Item** to add a goal.



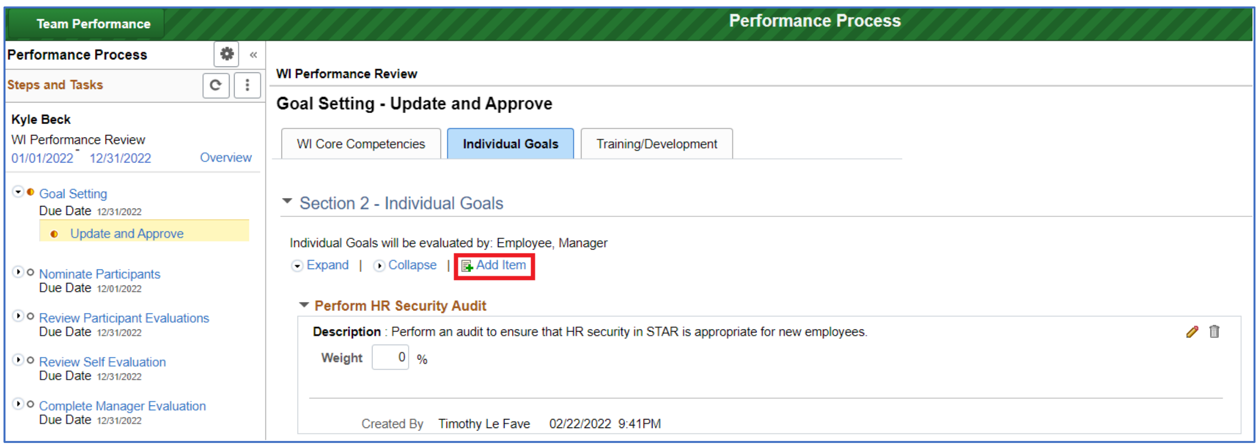
11. Click on the button next to **Add your own item** and then click **Next.** You may also copy goals from your other in-progress or completed reviews (see below for more information).



12. Complete the **Title** and **Description** (list your expectations here).   Click **Add** when complete.

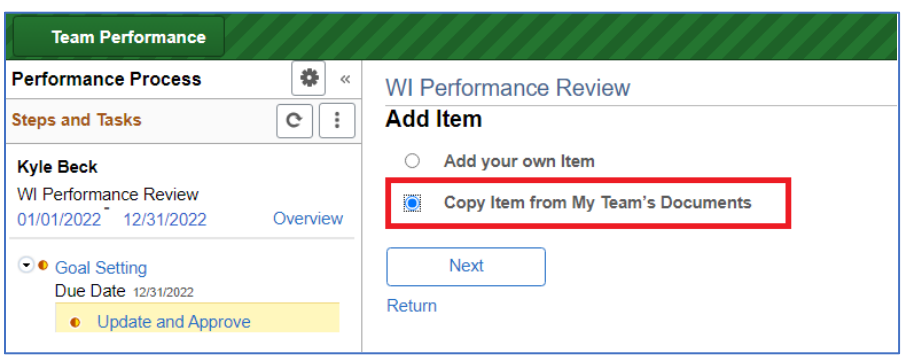


13. You can now view the added goal on the **Individual Goals** tab. Click on **Add Item** to add another goal/expectation. Repeat this process to enter all goals and expectations.

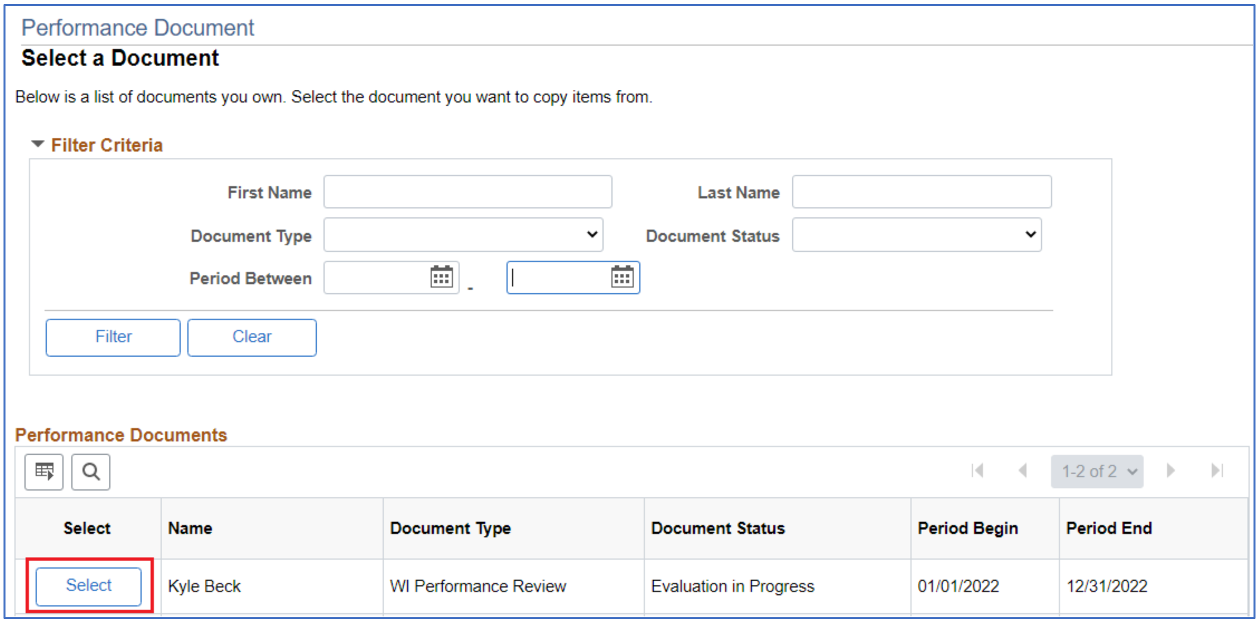


Copying Goals from Another Employee

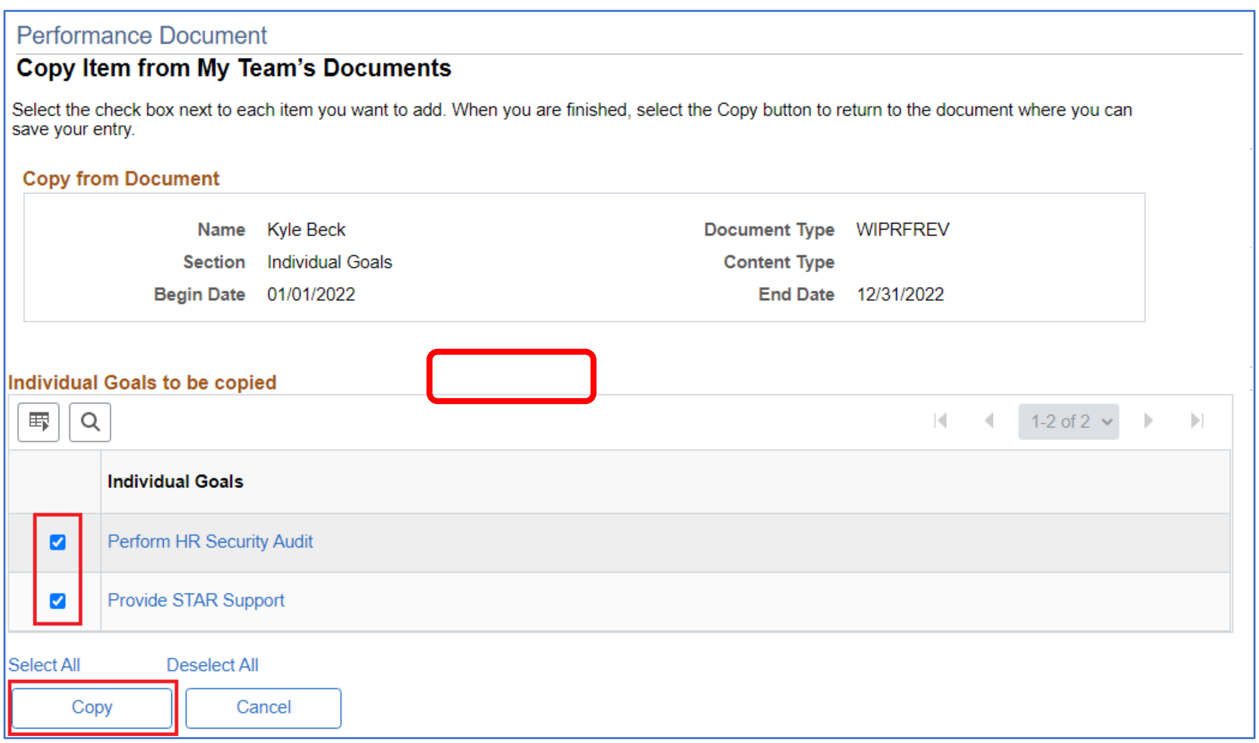
14. To copy Goals from another employee's review, select **Copy Item from My Team's Documents** when adding a new goal:



15. A list of employee reviews are shown. Click **Select** next to the employee whose goal(s) you wish to copy. You may also alter the search criteria to search for older reviews.



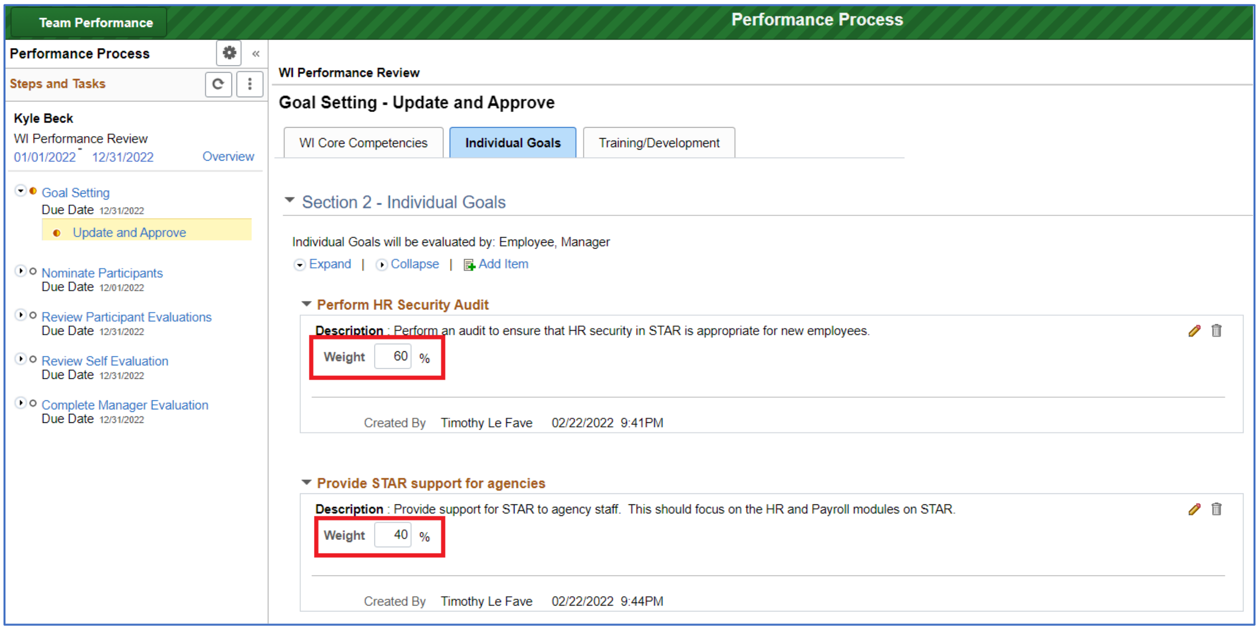
16. A list of the employee's goals will be shown. Click the box next to each of the goals that you want to be copied to the new evaluation. Then click **Copy.** This will import the select goals into the current review.



Weighting Goals

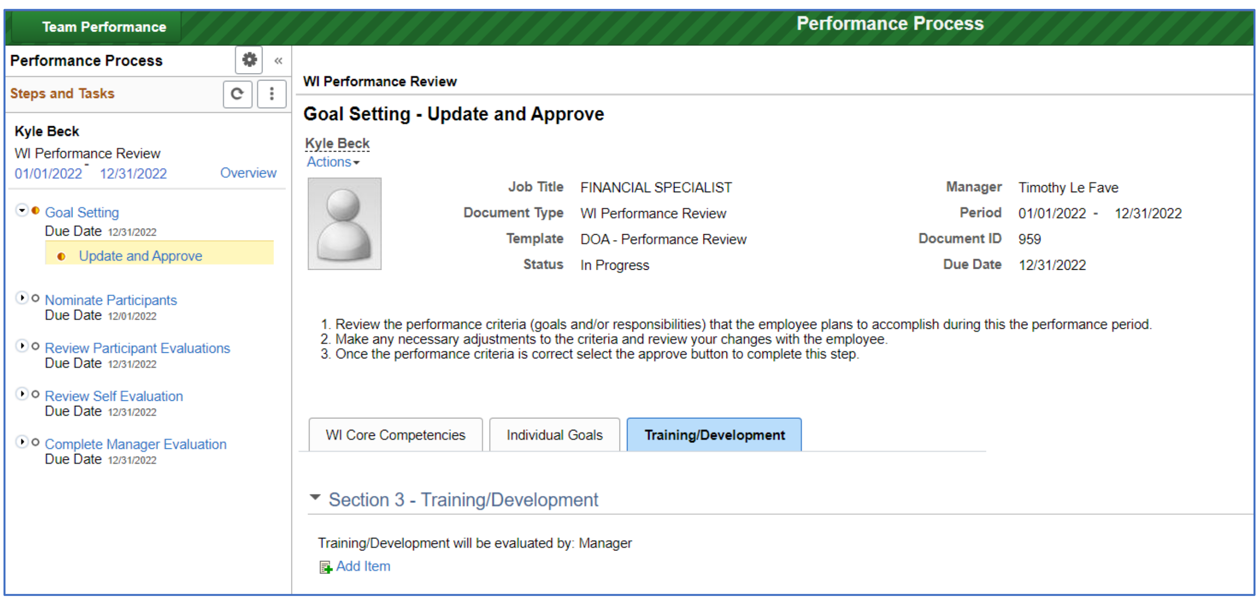
Depending on your agency, the goals entered may need to be weighted, so the system can calculate an overall score based on the ratings given to each competency and goal. To update the weighting on each goal, simply update the percentages next to each goal:

Notes: The weights must add up to 100%. Weights can also be updated as necessary during the "Complete Manager Evaluation" step.

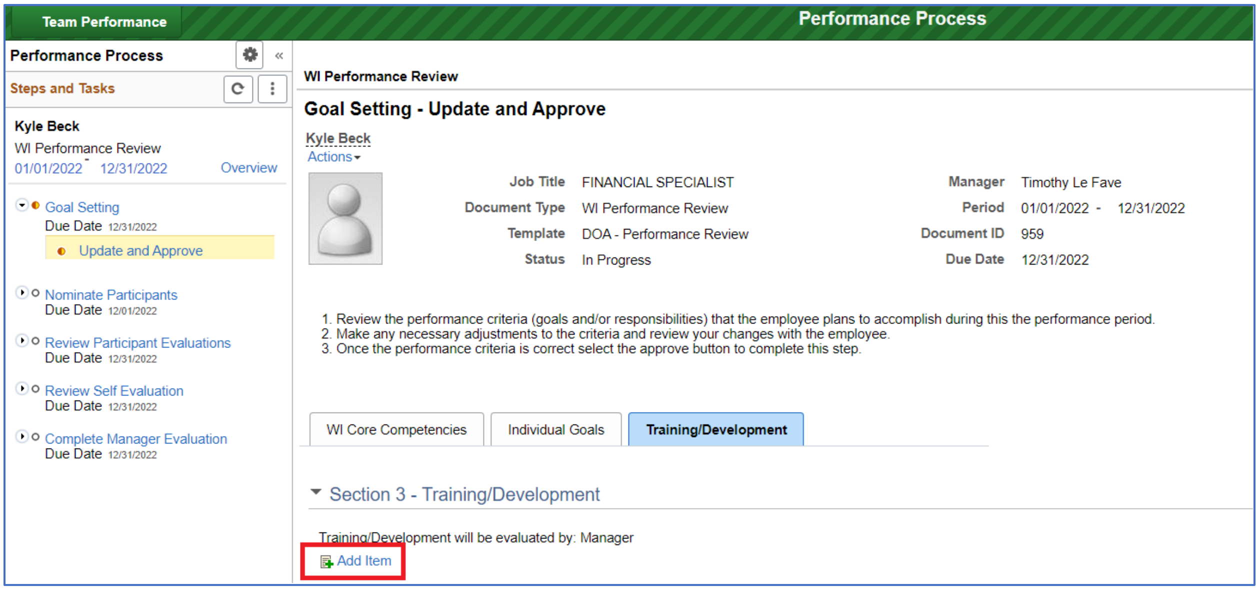


Training/Development Tab

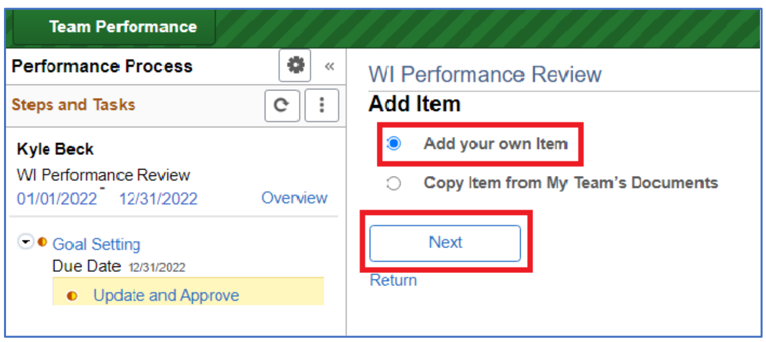
18. Once all Individual Goals are entered, you may navigate to the **Training/Development** tab.



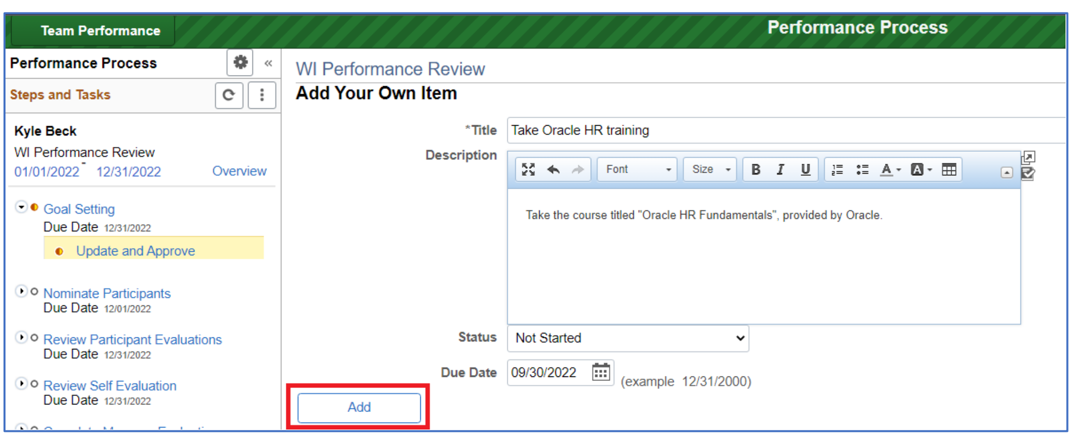
19. Click **Add Item to** add any Training or Development items in.



20. The process for adding a Training/Development item is the same as adding a Goal. You can either add your own item or copy items from another document. Once you have made a selection, click **Next.**

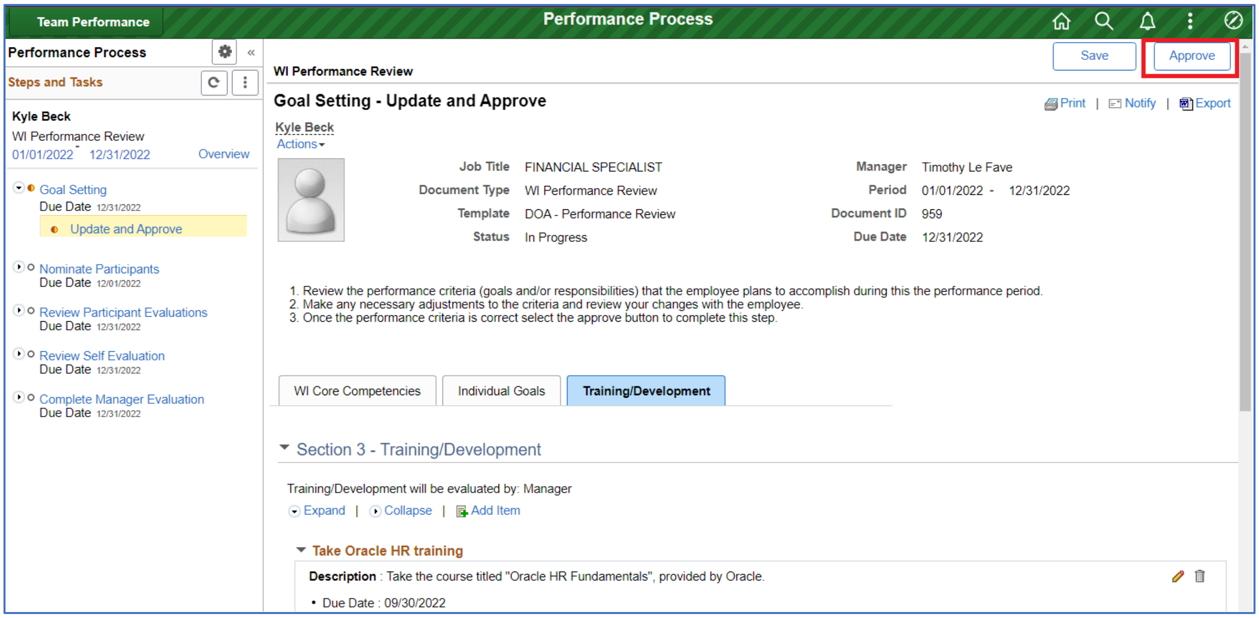


21. When adding your own item in, fill out the **Title** (name of the training), **Description** (any relevant details to the training), **Status** (selection of complete, in progress or not started made from the drop box) and **Due Date**. Then click **Add.**

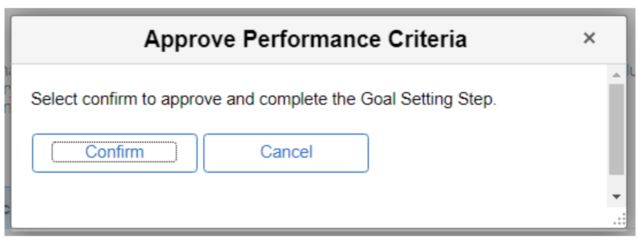


Completing Goal Setting

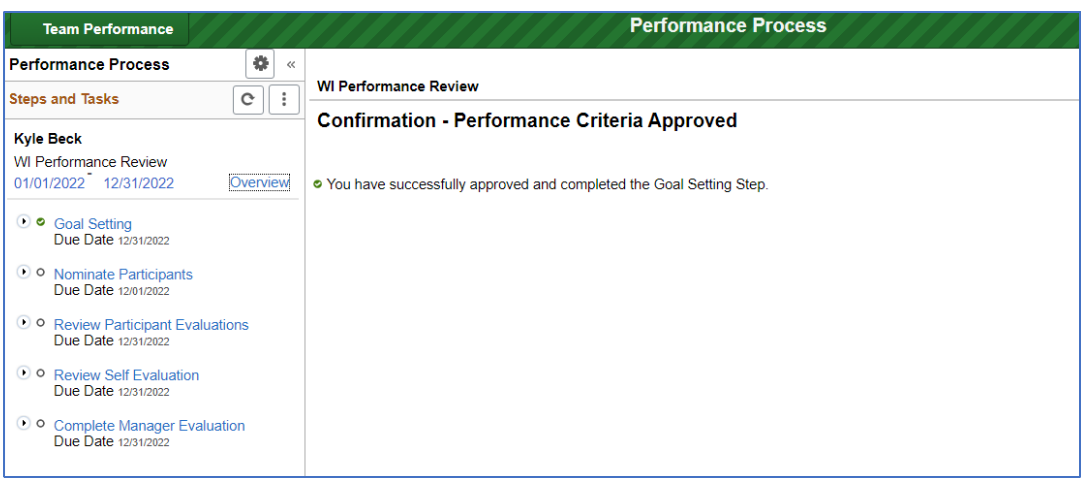
22. Once Goal setting is complete, you may click the **Approve** button in the upper right corner. Completing this step will notify the employee that their goals have been defined, and are now viewable in Employee Self Service.



23. A box will pop up to **Approve Performance Criteria.** You will select **Confirm.**

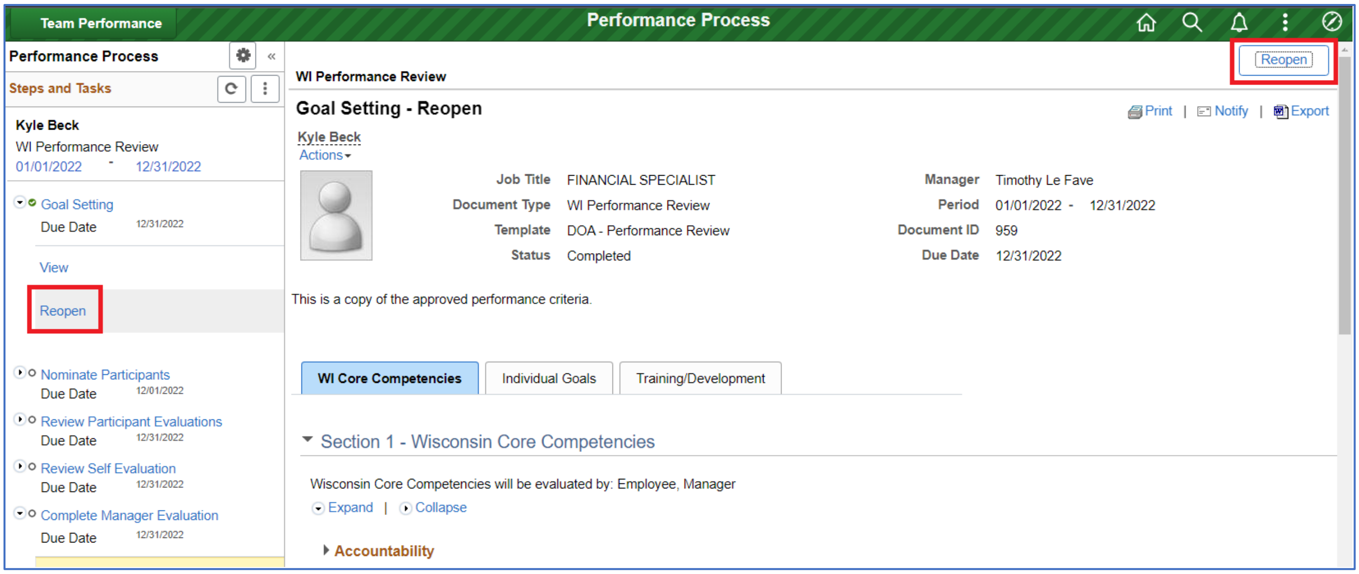


24. A confirmation screen will inform you the Goal Setting is complete.

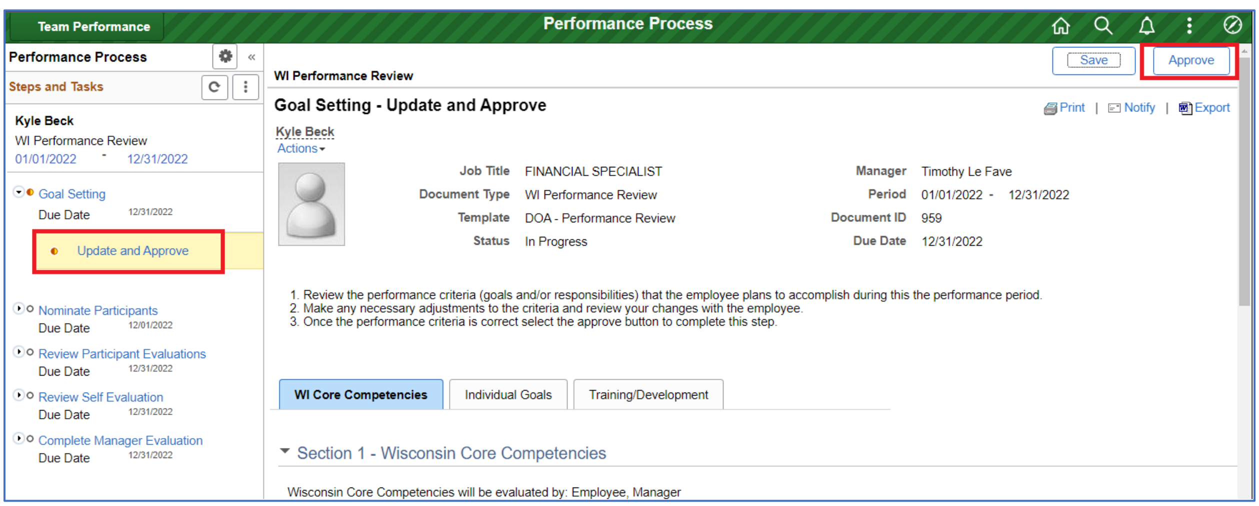


Reopening Goal Setting

1. If you find that you need to modify an employee's goals after initial approval, you may do so by opening the review document and navigating to the **Goal Setting** step on the left side of the page. Here you can click on **Reopen.** This will allow you to Reopen the document by clicking the **Reopen** button in the upper right-hand corner.



2. After reopening the document, you can click the **Update and Approve** link under the **Goal Setting** step to view and edit an employee's goals. Remember to click the **Approval** button once complete to progress the view to the next step.

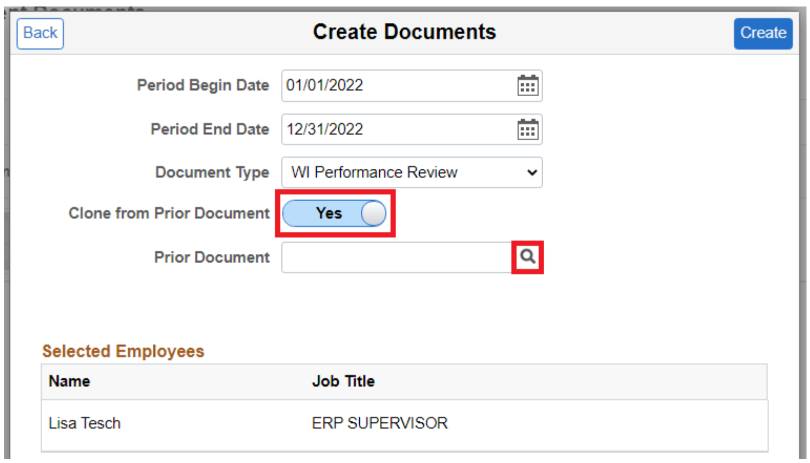


Cloning an Evaluation

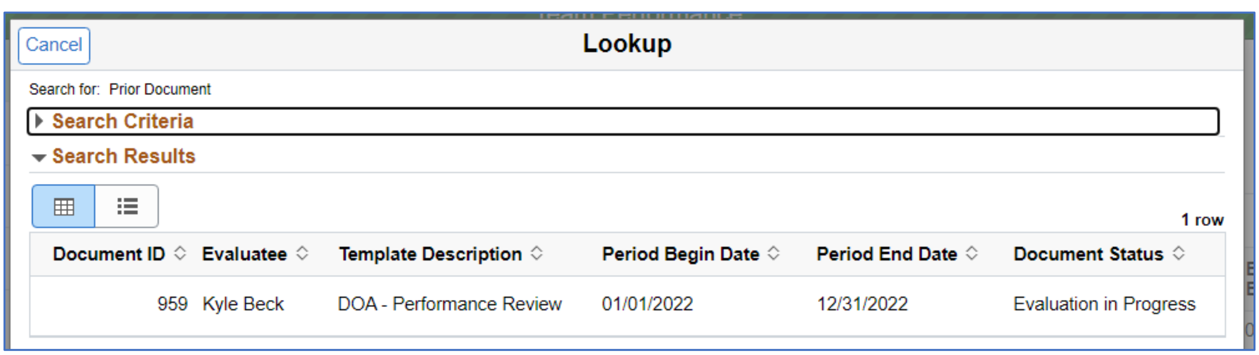
Once you have created an evaluation document, you may clone the document, either for other employees or the same employee for subsequent evaluations.

1. Follow the initial steps for creating a document by Clicking **Create Documents** from your Current Documents screen.

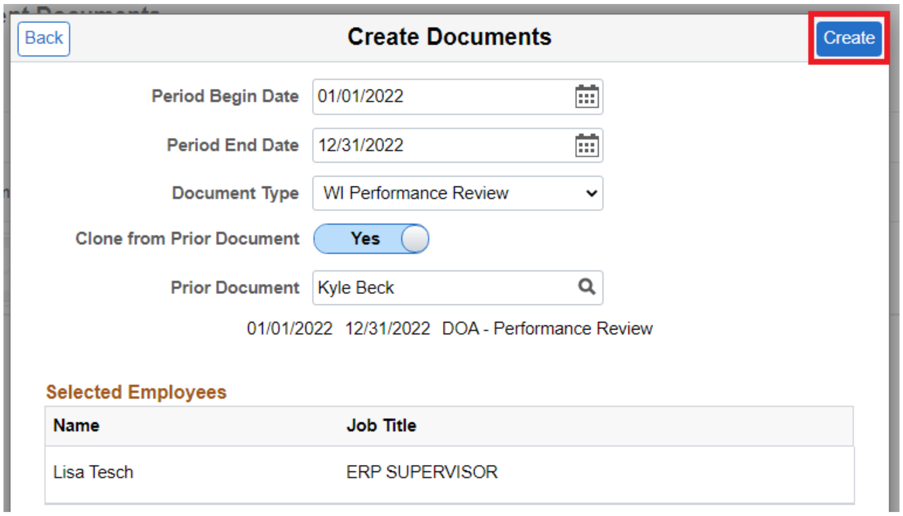
2. Once the pop up appears to input the document information (Period Begin Date, Period End Date, Document Type, etc.), move the slider next to **Clone from Prior Document** to say **Yes**. Click the **Magnifying Glass** in the **Prior Document** field to select the document you want to clone.



3. This will give you a list of other documents you have previously created. You can click anywhere in the search results to select the review you wish to clone. You can also expand the **Search Criteria** section to search by name and date.



4. Selecting a review to clone will return you to the Create Documents screen. You can now click **Create.**



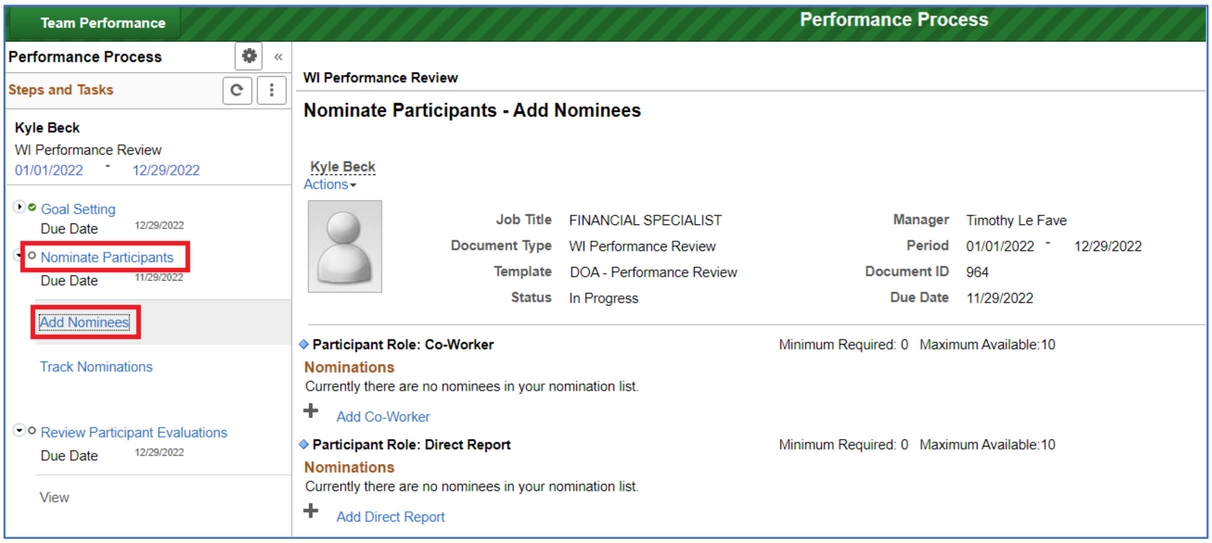
5. You may now complete the **Goal Setting** step for the cloned performance review as instructed above. Please note that the cloned review will include all **Goals** and **Training** items from the cloned review.

Peer/360 Reviews

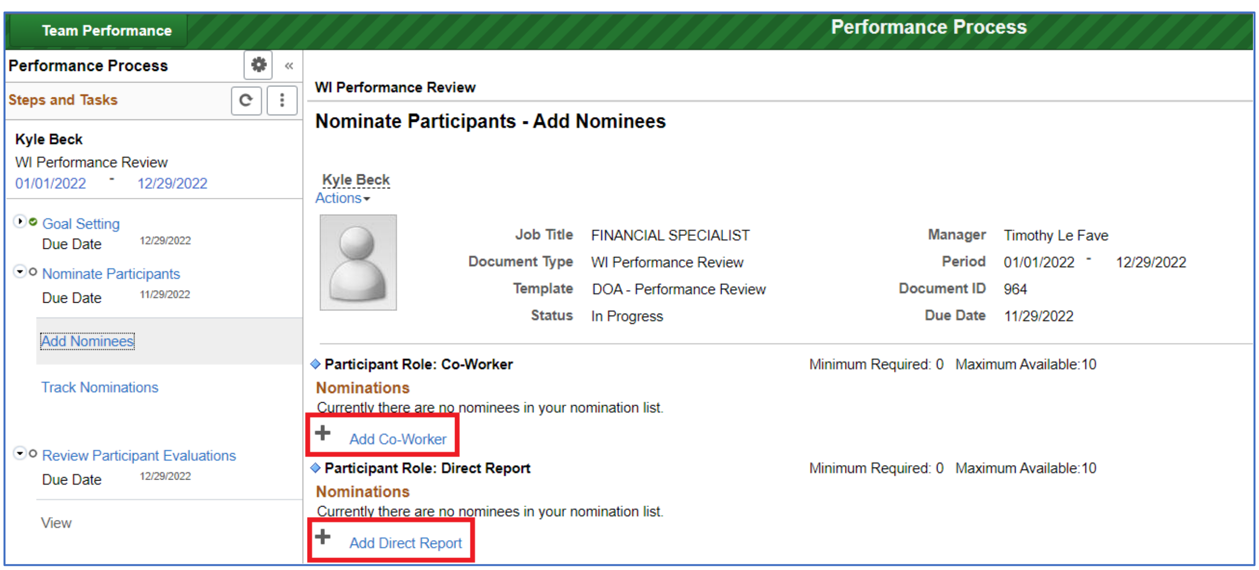
Your agency performance template may include the capability to solicit feedback from an employee's direct report, or other staff that work with the employee. This can be done via the **Nominate Participants** step.

Nominating Participants

1. To nominate a participant, select the **Nominate Participants** step on the left-hand side of the Performance review. Then select **Add Nominees.**

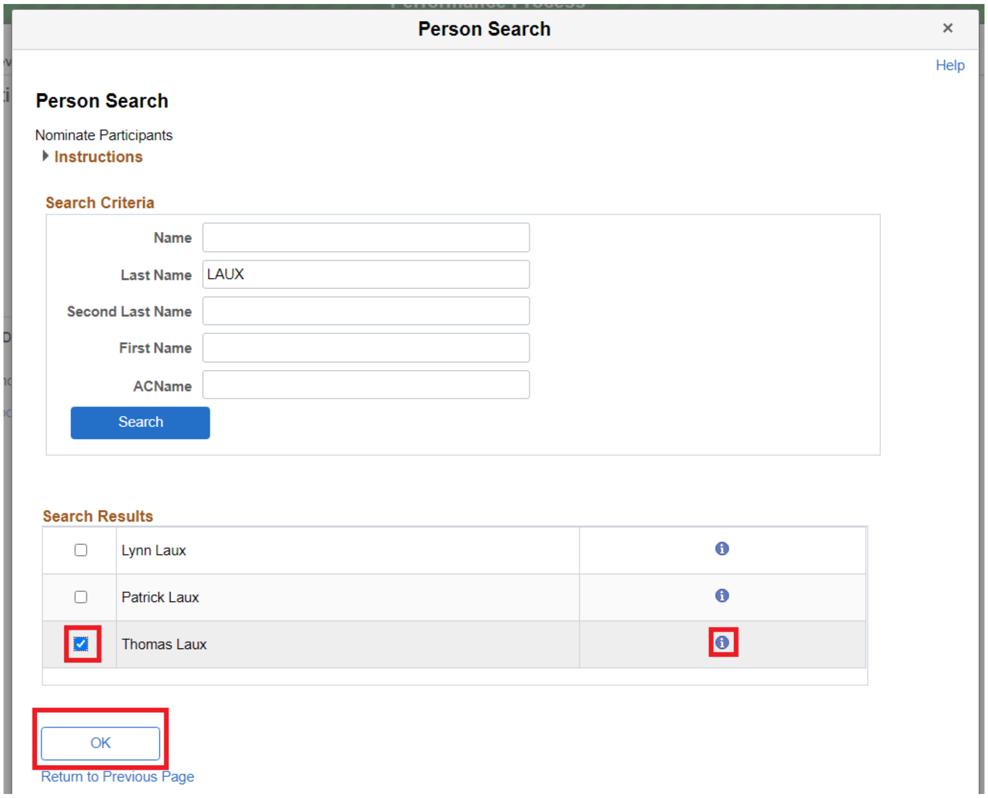


2. On the Nominate Participants – Add Nominees screen, you can click the **Add Direct Report** or **Add Co-Worker** links to search for a person from whom you wish to gather feedback about your employee.

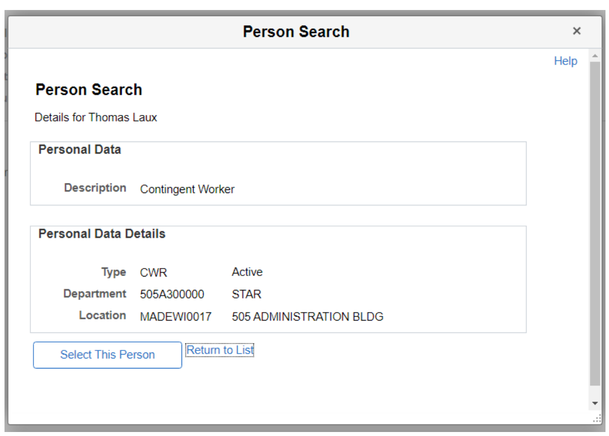


Note: Your agency may have other "Participant Roles" beyond the employee's direct report, such as Project Manager, or Co-manager.

3. The search page displayed will allow you to search for users that exist in STAR. Once you have found the person you wish to nominate for feedback, click the **OK** button.

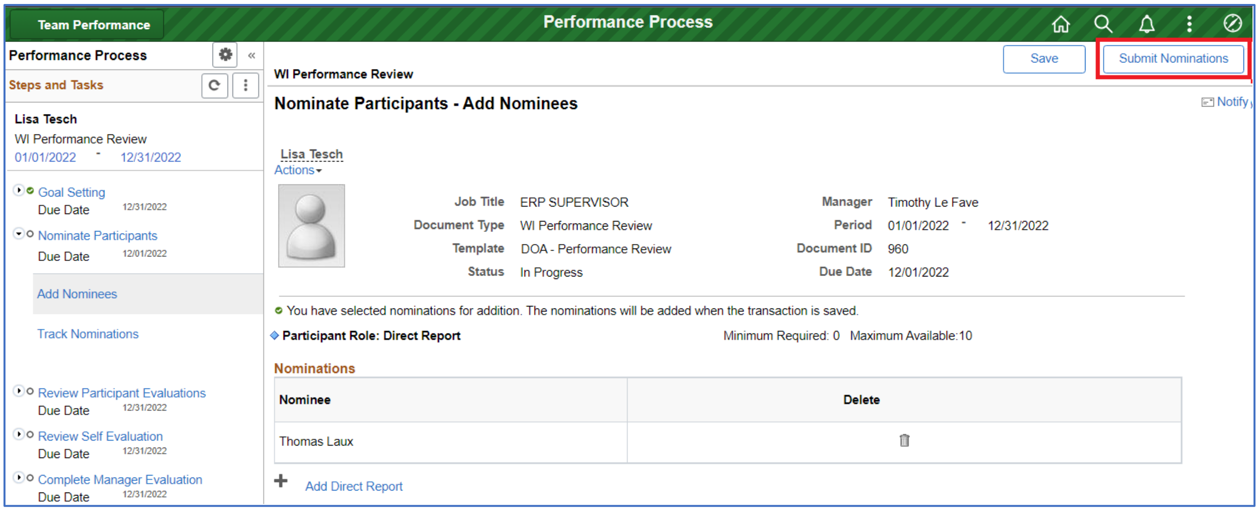


Note: If your search result returns multiple people with the same name, you can click in the blue informational icon to the right of the name, which will display additional information about the person to help you select the correct name:



4. After selecting the intended person, you will be returned to the **Nominate Participants – Add Nominees** screen. If you have additional people you wish to nominate, you may repeat the previous step to add additional participants. When complete, click the **Submit Nominations** button on the upper right-hand corner.

You will be returned to the main nomination screen. Repeat steps 1-4 for to add as many participants as desired. You will see employees continue to be added to the list.

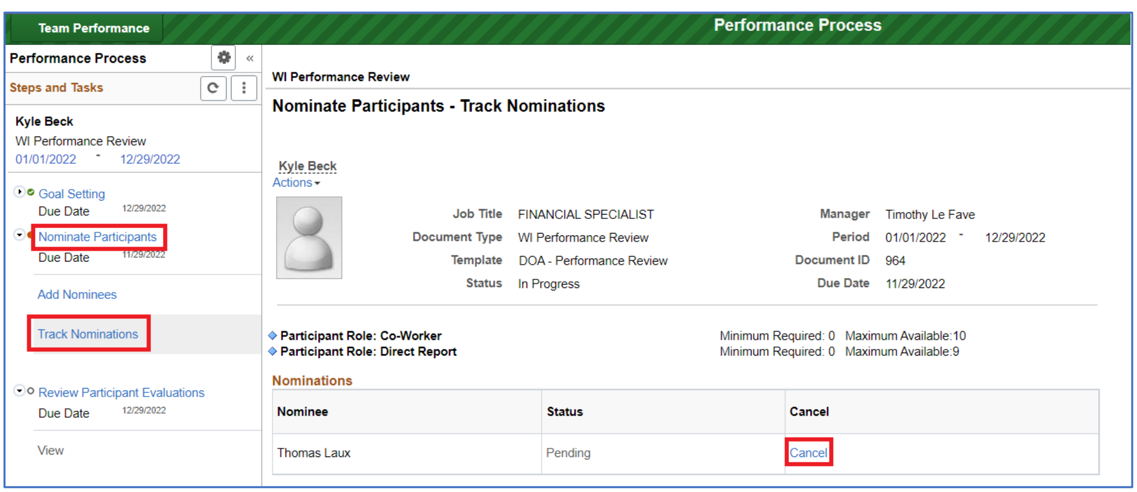


Once nominations have been submitted, the nominees will receive an email notification, and can provide feedback through the Performance Tile in Employee Self Service. The feedback will be visible to the supervisor (and only the supervisor) during the **Complete Manager Evaluation** step.

Reviewing or Cancelling Nominations

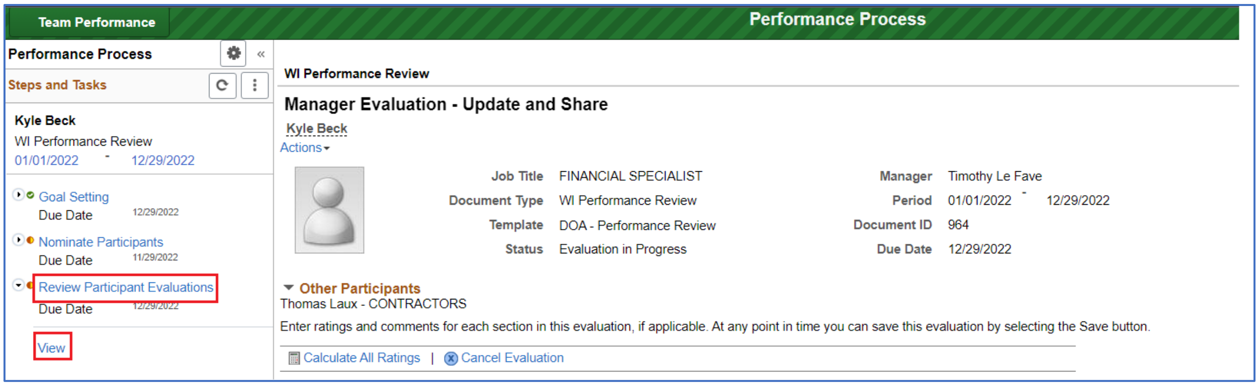
If you determine you no longer wish to receive feedback from a participant, you can cancel the request by clicking on **Nominate Participants** followed by **Track Nominations.** This page will display the status of feedback requests, and will allow you to cancel a request under the Cancel heading. If you cancel a nomination in error, you can also Resubmit a nomination to the participant.

You can view whether each participant's nomination is **Pending**, **Accepted**, **Declined**, or **Cancelled** under the Status heading.

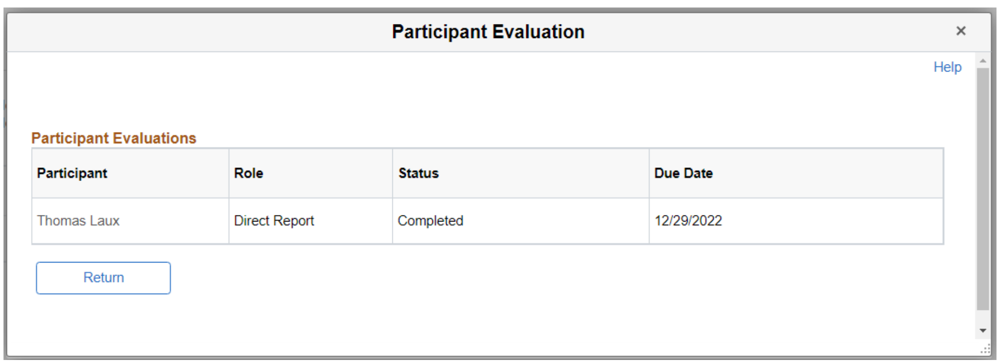


Viewing Participant Evaluation Status

1. To view the status of feedback requests, click the **Review Participant Evaluations** step on the left side of the page, then click **View.**



1. 2. A pop-up window will display all participants, as well as the status.

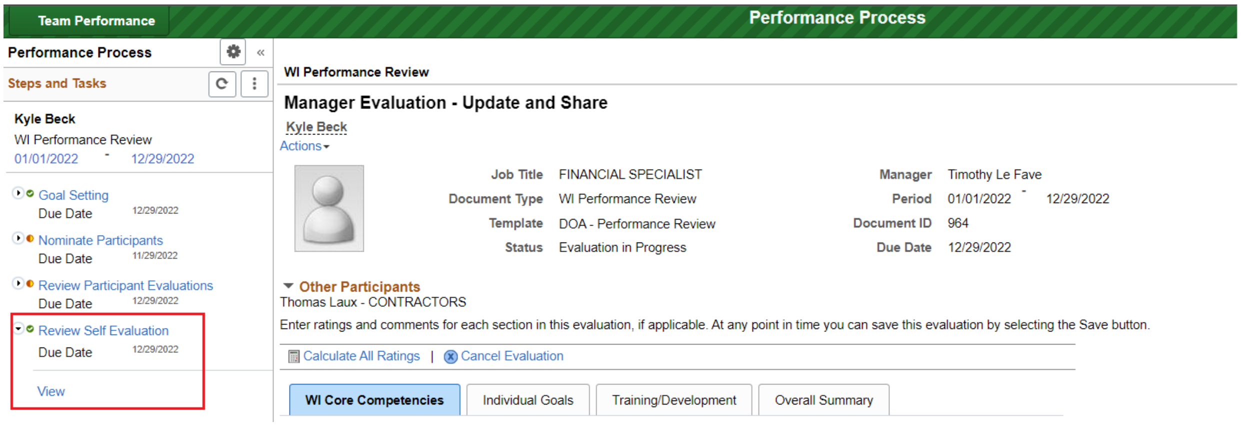


Additional Information:

1. The actual feedback provided will be visible to the manager during the final review.
2. Employees will not see participant evaluations from co-workers or direct reports at any point of the evaluation process. Only the supervisor can see participant evaluations.
3. This step is optional. It is not a requirement that you solicit feedback from others.

Employee Self Evaluations

Your agency's review process may include an optional self-evaluation step for employees. This will allow employees to provide feedback on their performance at any time after the Goal Setting step is complete. Once an employee has completed their self-evaluation, a green check will display next to the **Review Self Evaluation** step on the left side of the page. Clicking the **View** link will open the complete self-evaluation in a new browser tab.



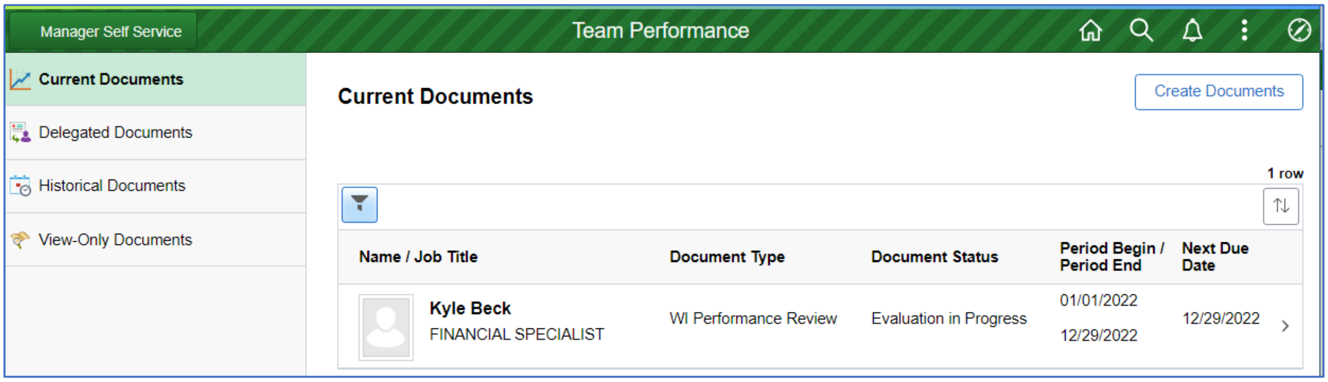
Notes:

1. Employee feedback will also display during the final evaluation step, which you may find more useful.
2. If an employee marks their self-evaluation section as complete, but subsequently wants to make updates, the manager can reopen the comments by clicking the **Review Self Evaluation** link on the left menu and then clicking the **Reopen** link.

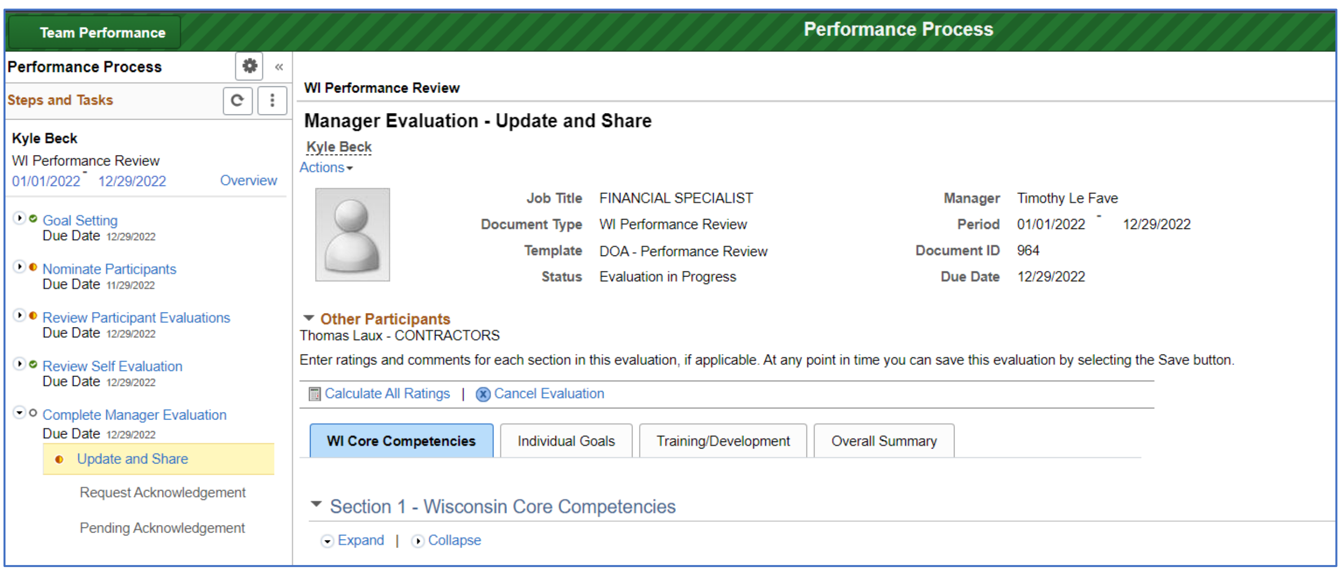
Completing a Performance Review

This step will guide you through entering the ratings and comments for each competency or goal for a performance review.

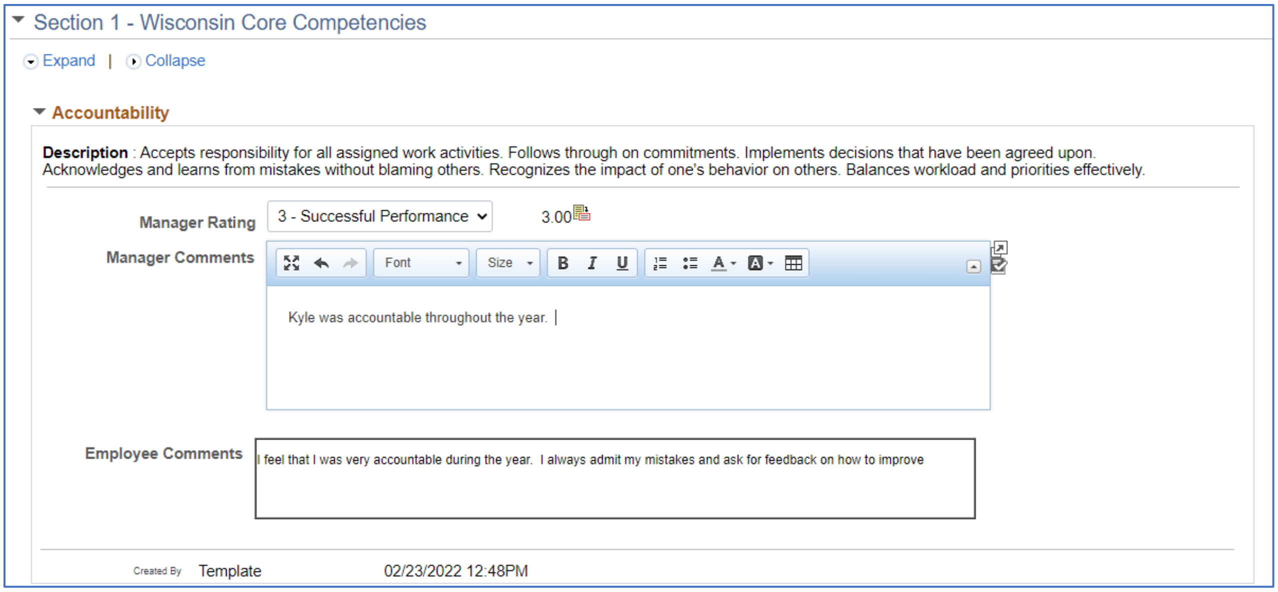
1. Once you are ready to complete a performance review, you can select from the list of **Current Documents** the **Team Performance** page. To open the performance review, click on the specific review in the list on the right side of the page.



2. On the **Manager Evaluation – Update and Share** page , you will be shown the competencies, goals, and training items that you defined during the **Goal Setting** process. First, start with the **WI Core Competencies** tab.

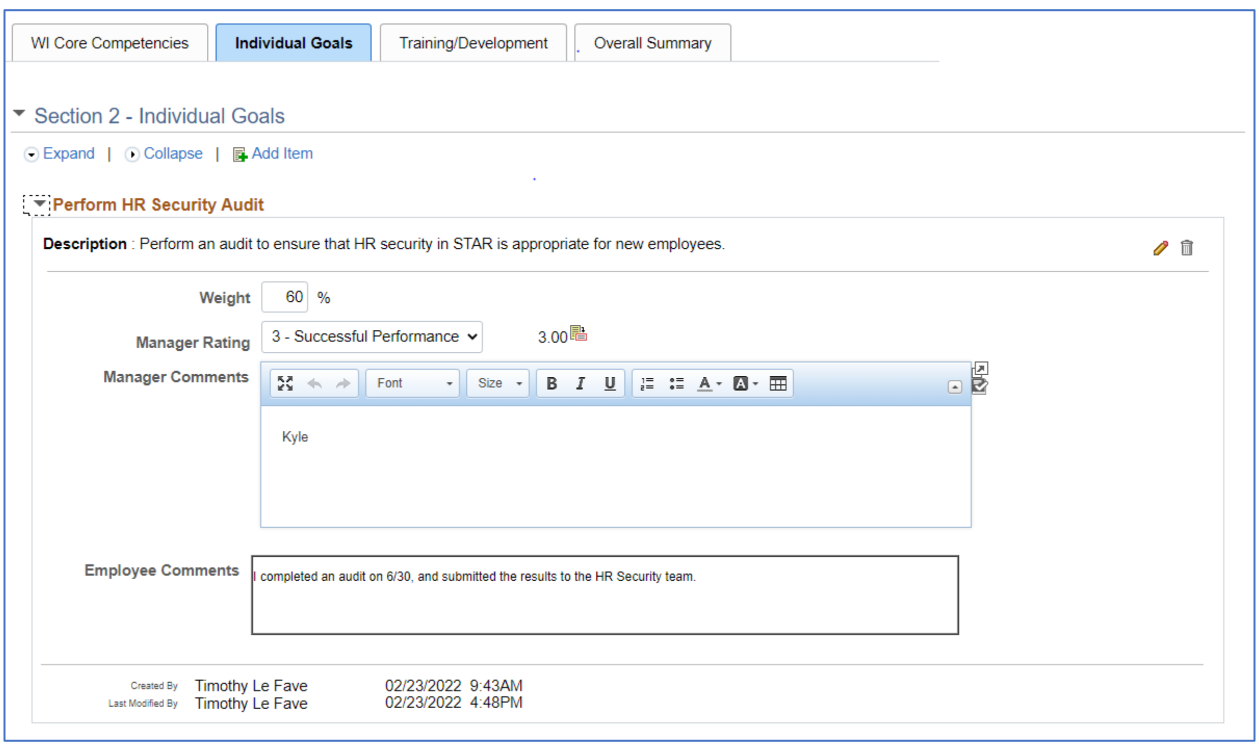


3. You can now proceed to enter the ratings and comments on each **WI Core Competency**.



Note: If your agency uses an employee self-evaluation, you may see employee comments below each item.

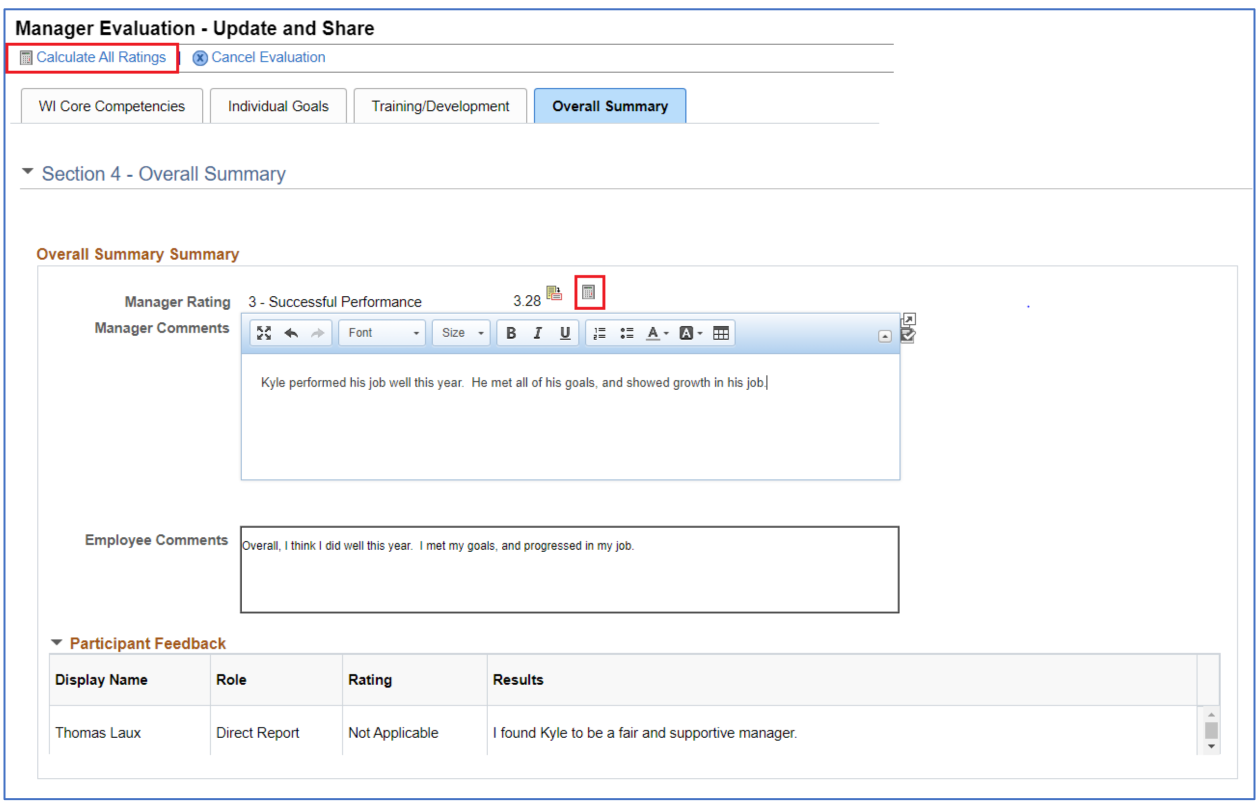
4. Once complete, enter the ratings and comments for the **Individual Goals** tab.



Note: For agencies that use weighting, you also can adjust the weight of each goal at this step.

4. If you have updates to make related to training and development, you can do so via the **Training/Development** tab. If you need to change the status, due date, or other information for the training, click the Pencil icon to update the item:

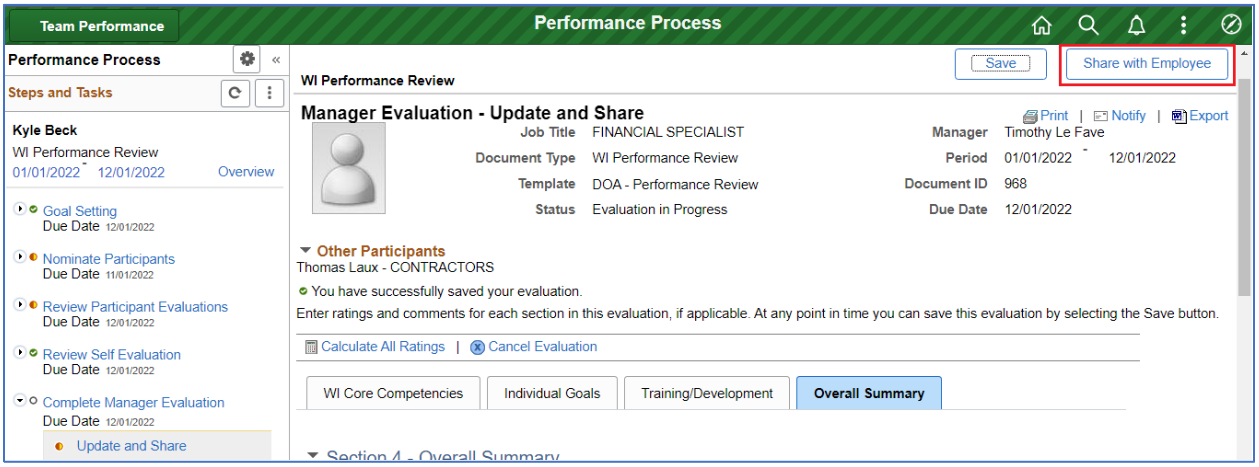
5. The final tab is the **Overall Summary** for the performance review. This is where the overall rating is assigned, as well as any overall comments you wish to provide. Depending on your agency's performance review, you may also see the comments entered by the employee and/or other participants.



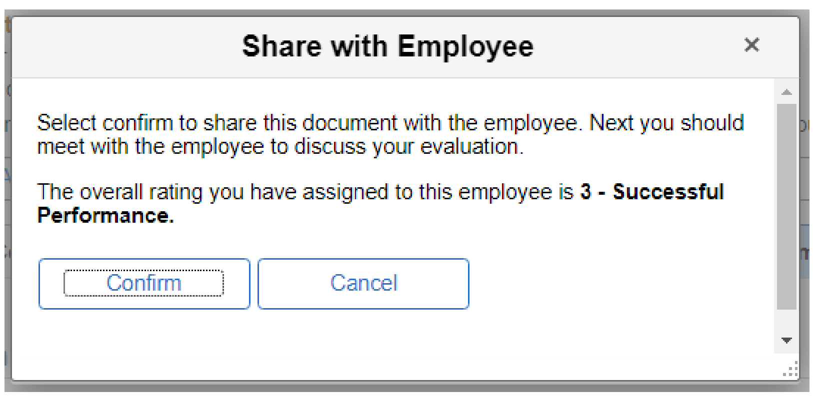
Note: If your agency uses a weighted performance review, you may also need to click the **Calculate All Ratings** link, or the calculator icon to have the system determine the Overall Rating.

Sharing a Review with an Employee

1. Once you feel that the performance review is ready to be shared with the employee, you can click the **Share with Employee** button on the upper right-hand corner of the evaluation screen:



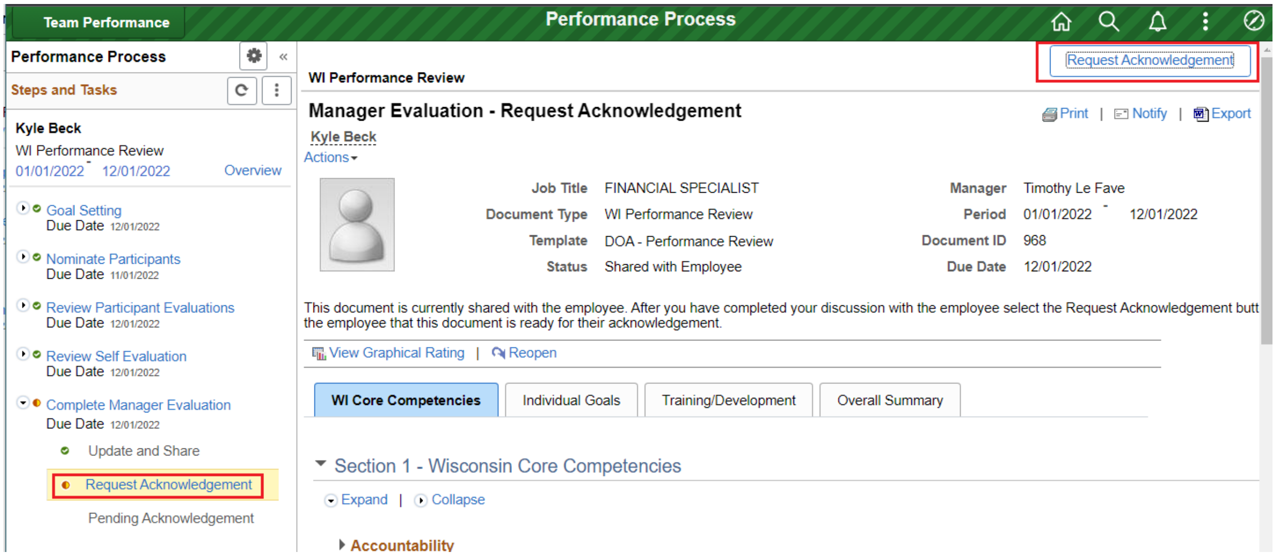
2. A prompt will show, asking you to confirm the rating assigned to the employee before it is shared**.** Click **Confirm.**



Once confirmed, an email notification will be sent the employee, letting them know they can view their performance review in **Employee Self Service.**

Requesting Acknowledgement of a Review

1. Once you have met and discussed the review with the employee, you can request an acknowledgement of the final review by clicking on the **Request Acknowledgement** step on the left side of the review page:



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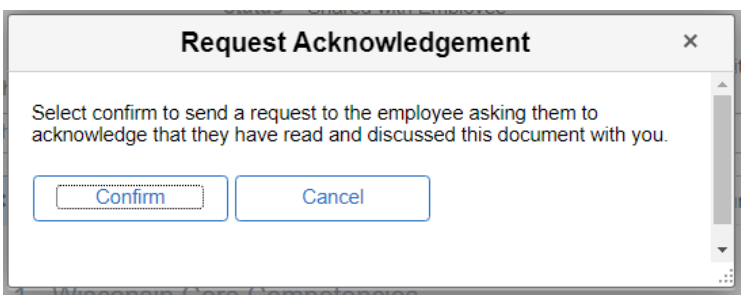
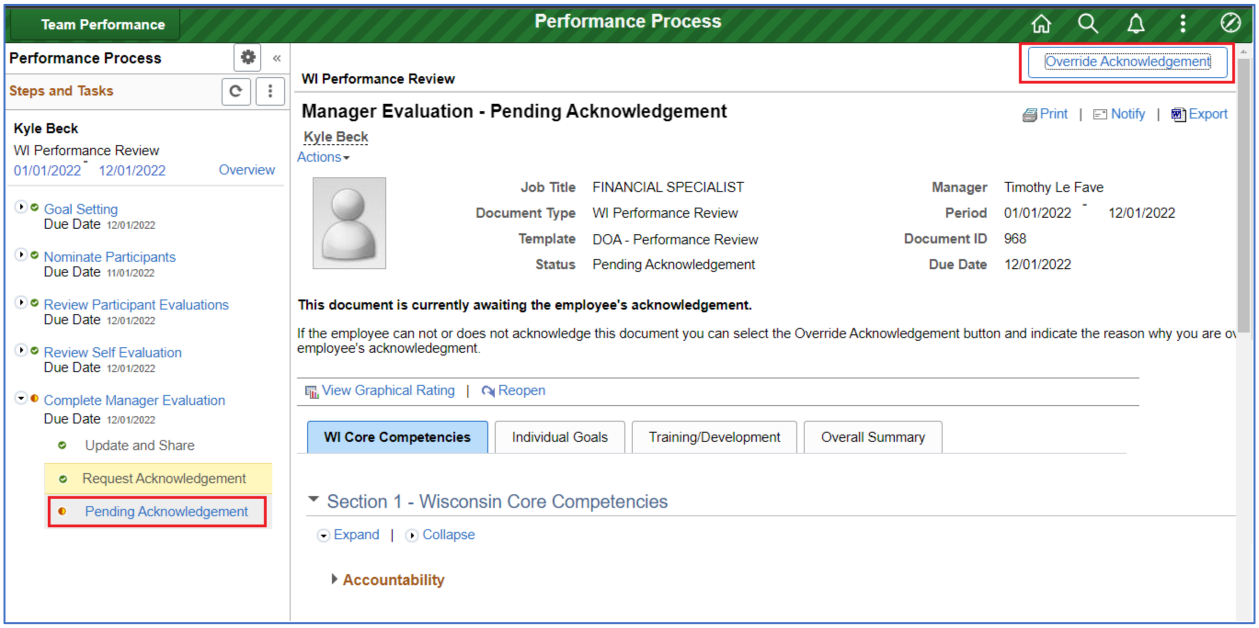


Once confirmed the employee will receive an email notification instructing them to acknowledge their performance review in **Employee Self Service.** They will have the opportunity to provide comments, which can be viewed on the **Overall Summary** tab of the performance review.

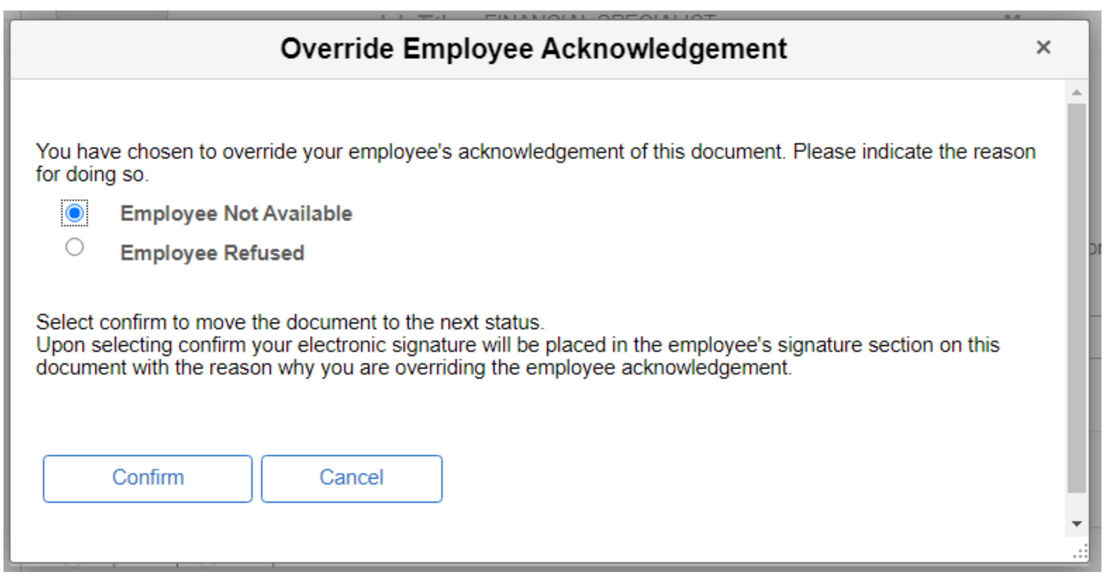
Overriding Acknowledgements

In the event the employee does not wish to acknowledge their performance review, the acknowledgement can be overridden by the supervisor.

1. Click the **Pending Acknowledgement** link under **Complete Manager Evaluation** on the left side of the screen:



2. If you wish to override the Acknowledgement, click the **Override Acknowledgement** button the upper right-hand corner of the page. This will display a prompt where you can select the reason for the override and **Confirm.**

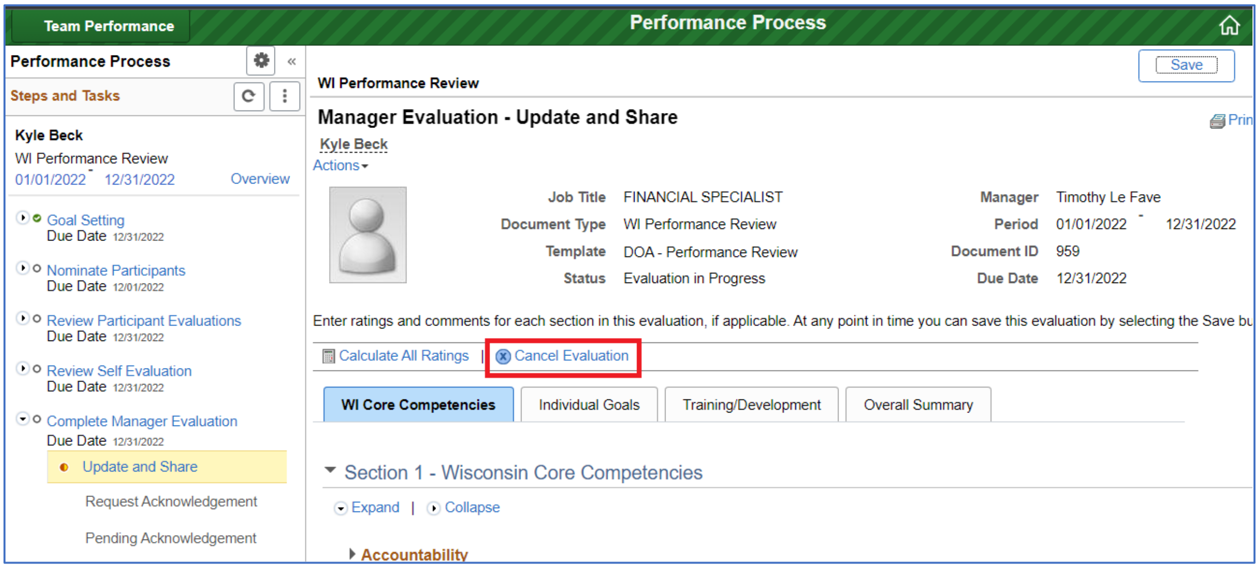


Employee Rebuttals

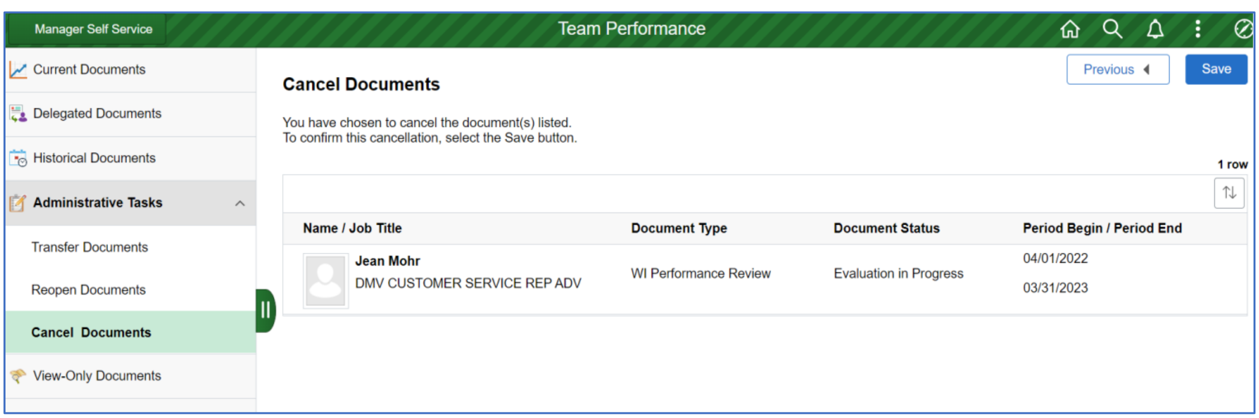
An employee may wish to submit a rebuttal to their evaluation. Rebuttals are managed outside of ePerformance, and do not automatically download to an employee's personnel file. HR staff should upload a rebuttal individually to the employee's personnel file.

Canceling Evaluations

1. If an evaluation needs to be cancelled, you can do so by clicking the **Cancel Evaluation** link after entering a review from the Team Performance page. Please note that cancelled evaluations cannot be reopened.



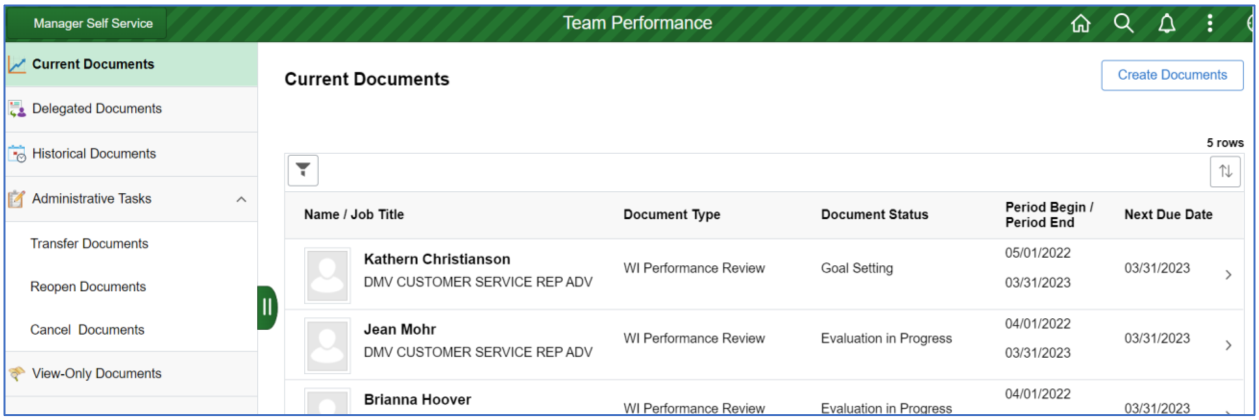
2. Next, a screen will show reaffirming that you are choosing to cancel the document(s) listed on the page. Click **Save** in the upper right-hand corner to proceed with the cancelation of the document(s).



3. A confirmation message will briefly appear at the top of the page and then disappear. The document will no longer be viewable in your Current Documents list, but will be viewable in your Historical Documents tab.

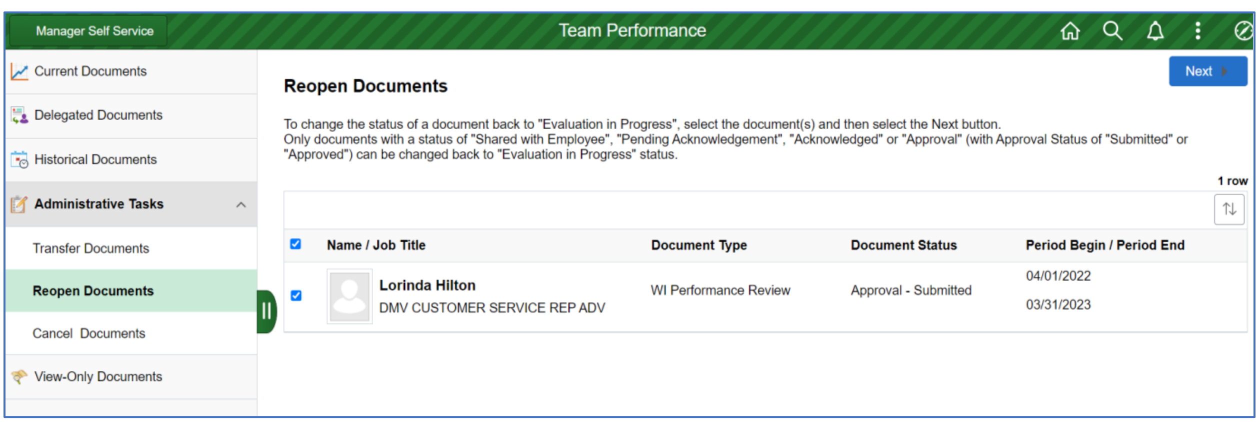
Reopening Evaluations

1. To reopen an evaluation, use the above initial instructions to navigate to the Performance Administration tile. There, click on **Administrative Tasks** on the left side of the screen, and when the options drop down, select **Reopen Documents.**

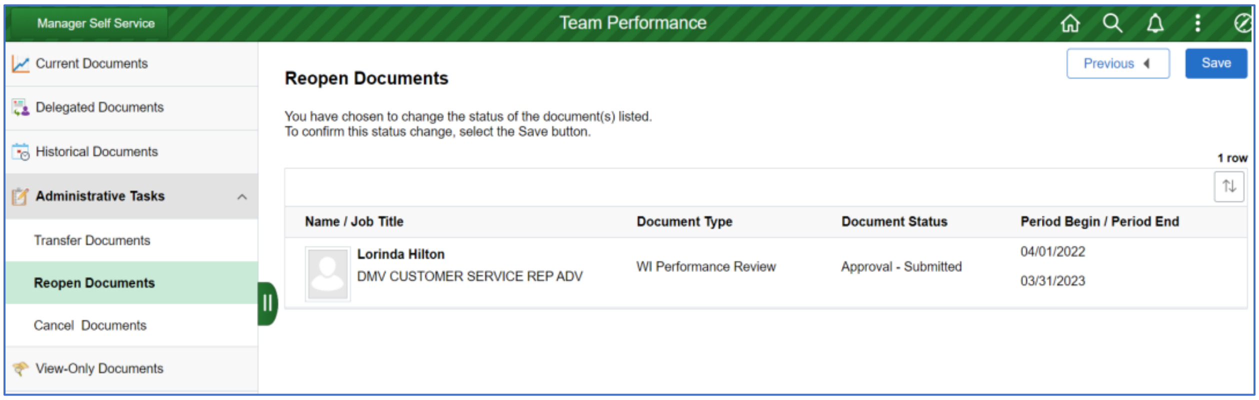


2. A list of your documents will show up. There, check the box next to the document(s) you want reopen and then click **Next** in the upper right-hand corner of the page. *Notes:* (1) *You can reopen a document from any phase of the evaluation process with the exception of completed evaluations (ones that the employee has acknowledged, the manager has completed/finalized and has been uploaded electronically to the employee's personnel file). (2) If the evaluation has been completed and needs to be reopened, please contact your assigned HR Specialist.*

Check the box next to the document(s) you wish to reopen and then click **Next** in the upper right-hand side of the page.



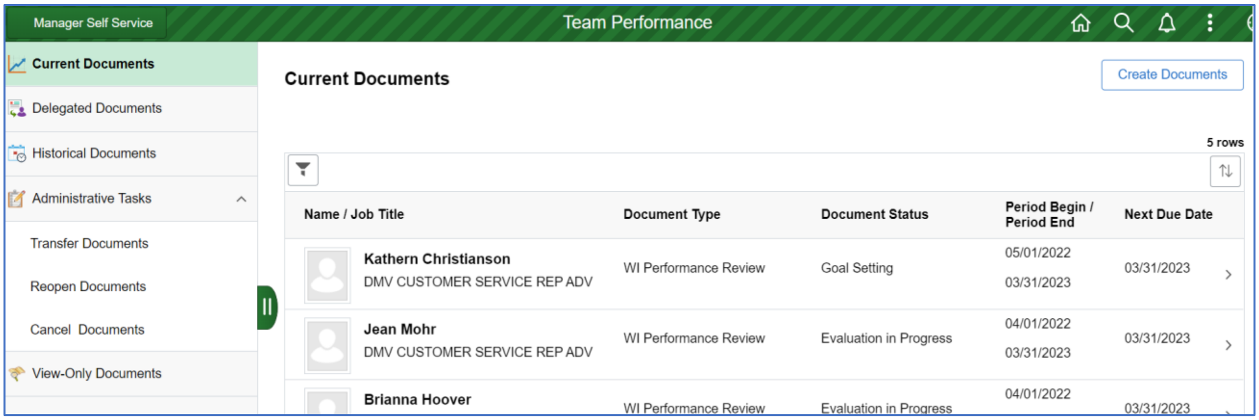
3. Next, a screen will show reaffirming that you are choosing to change the status of the document(s) listed below on the page. Click **Save** in the upper right-hand corner to proceed with the reopening of the document(s).



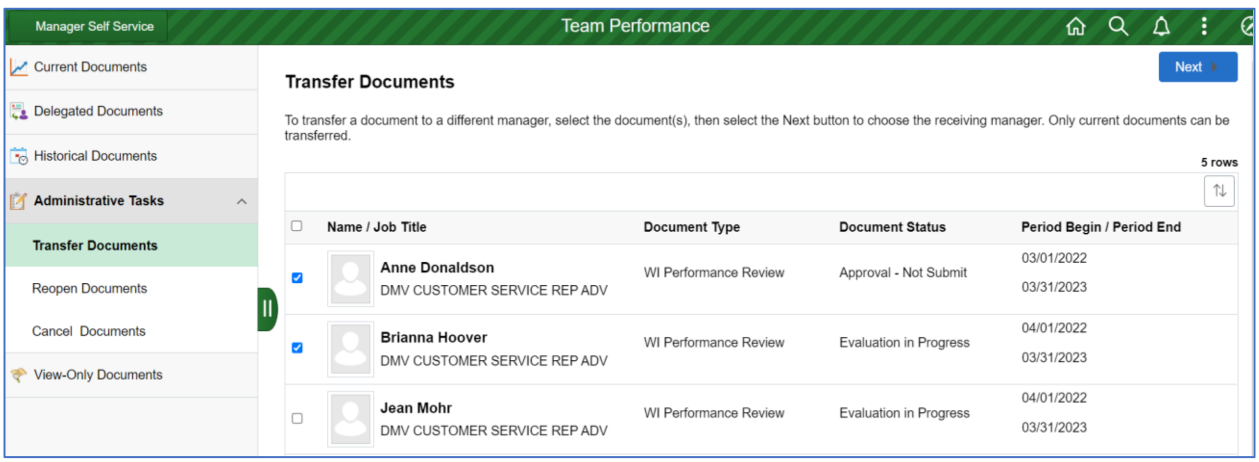
4. A confirmation message will briefly appear at the top of the page and then disappear. Then, when you navigate to your Current Documents list, you will be able to see the document(s).

Transferring Evaluations

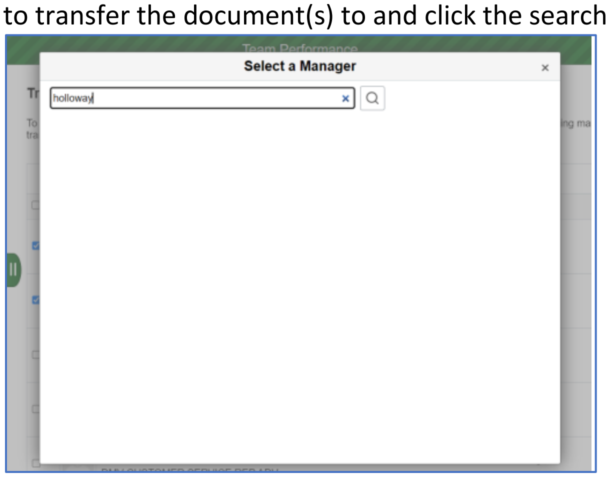
1. To transfer a document to a different supervisor, use the above instructions to navigate to the Performance Administration tile. There, click on **Administrative Tasks** on the left side of the screen, and when the options drop down, select **Transfer Documents**.



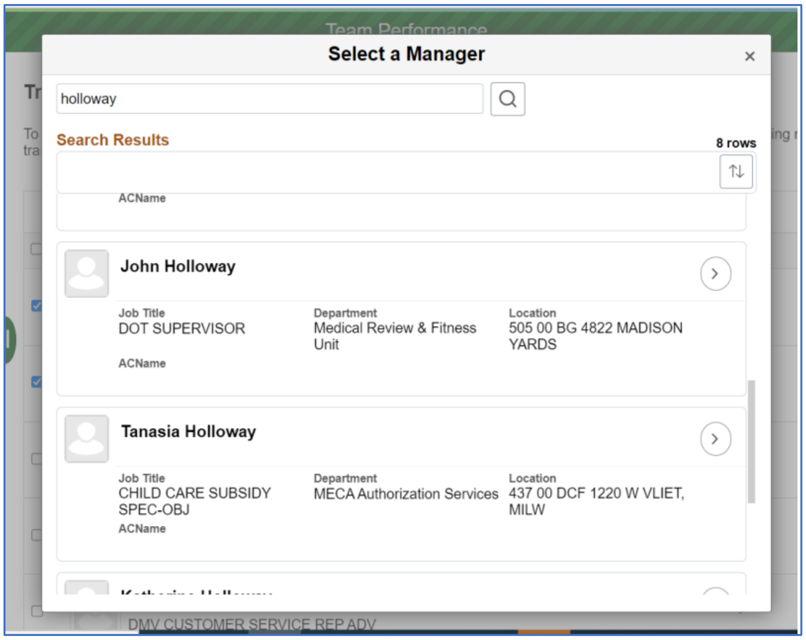
2. A list of your documents will show up. There, you check the box next to the document(s) you want transfer and then click **Next** in the upper right-hand corner of the page.



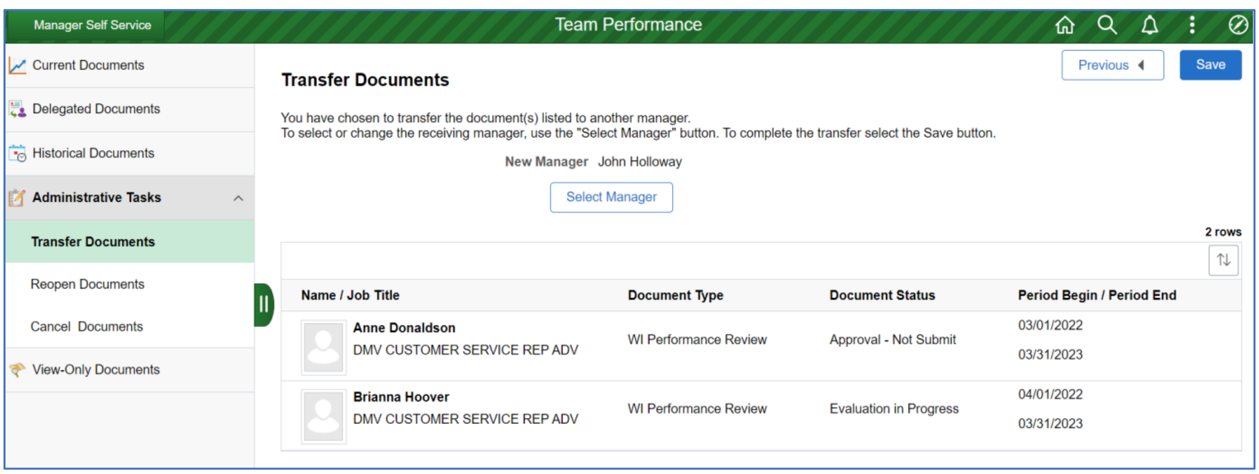
3. A Select a Manager box will pop up on the screen. There, type in the name of the manager you wish to transfer the document(s) to and click the search icon.



3. The exact match or a list of matches for your search will show up. Click the arrow next to the manager you wish to transfer the document(s) to.



4. The next screen will show the selected manager that the document(s) will be transferred to, along with the document(s) below. If that information is correct, click **Save** in the upper right -hand side of the page.



5. A confirmation message will briefly appear at the top of the page and then disappear. The transferred document(s) will no longer be viewable in your current documents list. The manager who is receiving the transferred document will get an email letting them know that a document has been transferred to them.

Exporting and Printing Evaluations

You can export your evaluation to Word by clicking on **Export** in the upper right of any page within the evaluation. The file will automatically download.

The document will download as an .rtf document.

You can also print your evaluation by clicking on **Print**. It will generate ga PDF document that can be downloaded and/or printed.