

# STAR ePerformance Job Aid – Supervisor

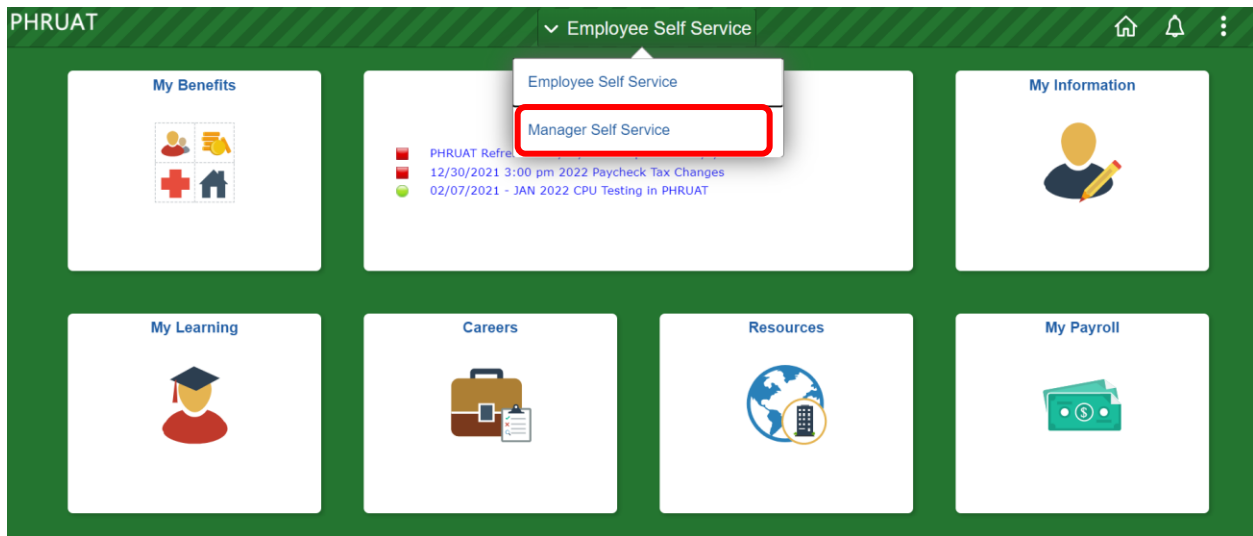
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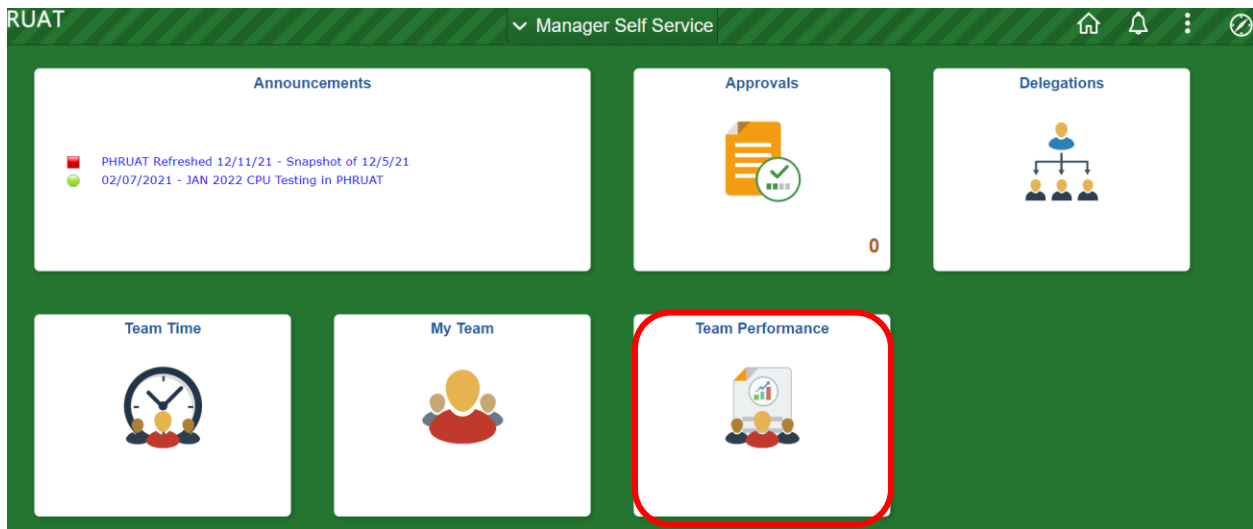
## Creating New Performance Documents:

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.

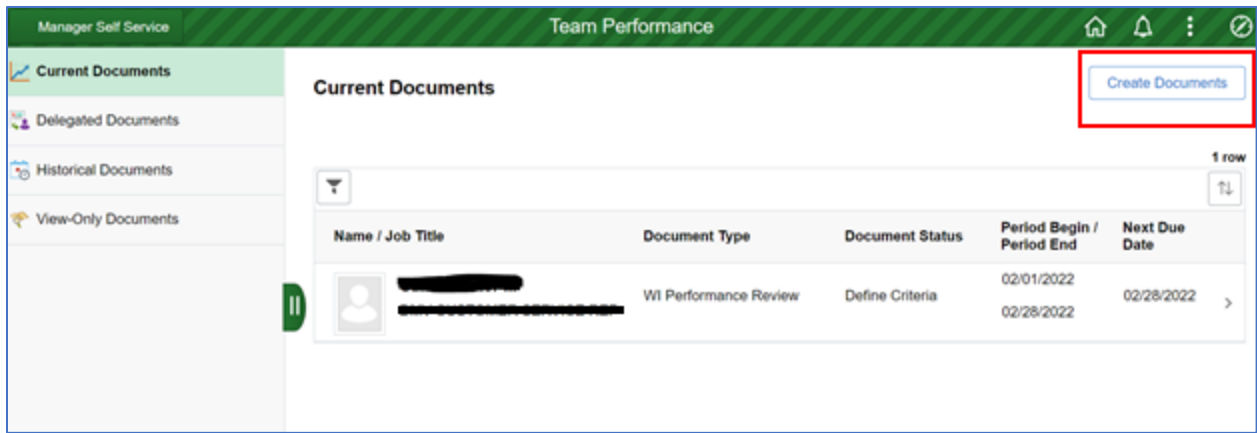


2.) Once on the Manager Self Service homepage, you will notice the “Team Performance” tile. This is how you will create and manage all reviews for your team.

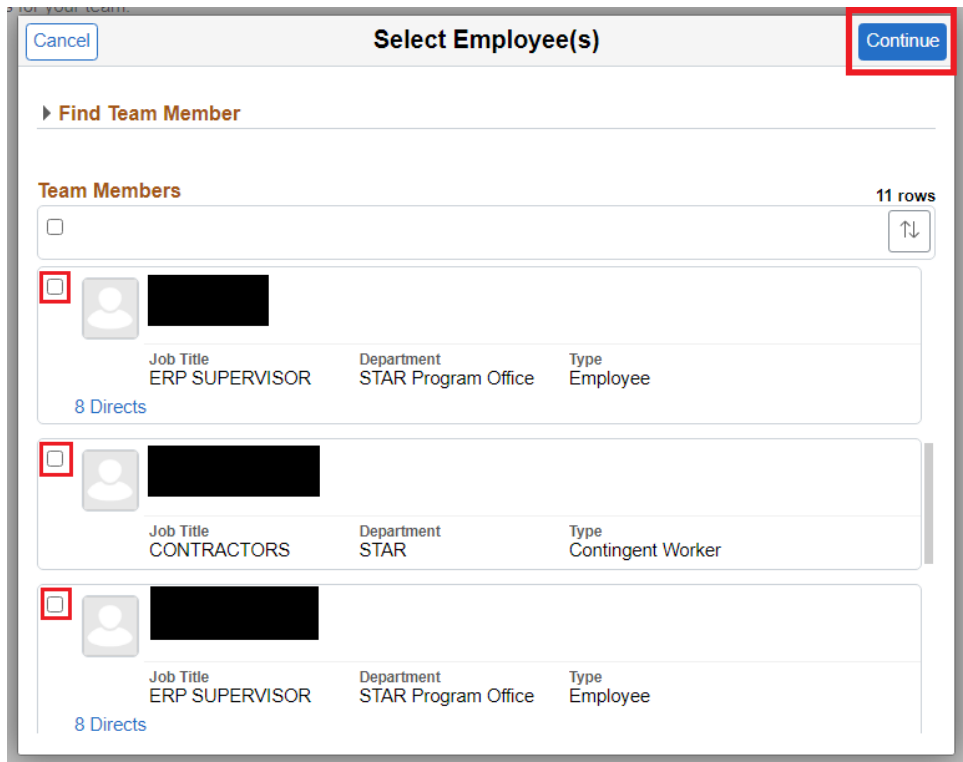


3.) On the “Team Performance” page, you will see some options on the left of the screen. Most often you will be working in the “Current Documents” section, which will show all Performance Reviews currently in progress.

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.

ts for your team

Back **Create Documents** Create

Period Begin Date 01/01/2022

Period End Date 12/31/2022

Document Type WI Performance Review

Clone from Prior Document No

Template DOA - Performance Review

**Selected Employees**




Name	Job Title
Kyle Beck	FINANCIAL SPECIALIST

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.

Manager Self Service		Team Performance														
<ul style="list-style-type: none"> <li><b>Current Documents</b></li> <li>Delegated Documents</li> <li>Historical Documents</li> <li>View-Only Documents</li> </ul>		<h3>Current Documents</h3> <div style="text-align: right;"><a href="#">Create Documents</a></div> <table border="1"> <thead> <tr> <th>Name / Job Title</th> <th>Document Type</th> <th>Document Status</th> <th>Period Begin / Period End</th> <th>Next Due Date</th> </tr> </thead> <tbody> <tr> <td> <b>Kyle Beck</b> FINANCIAL SPECIALIST</td> <td>WI Performance Review</td> <td>Goal Setting</td> <td>01/01/2022 12/31/2022</td> <td>12/31/2022</td> </tr> </tbody> </table>					Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	 <b>Kyle Beck</b> FINANCIAL SPECIALIST	WI Performance Review	Goal Setting	01/01/2022 12/31/2022	12/31/2022
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date												
 <b>Kyle Beck</b> FINANCIAL SPECIALIST	WI Performance Review	Goal Setting	01/01/2022 12/31/2022	12/31/2022												

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.

Team Performance		Performance Process			
<b>Performance Process</b> <ul style="list-style-type: none"> <li><b>Steps and Tasks</b></li> <li><b>Kyle Beck</b> WI Performance Review 01/01/2022 - 12/31/2022 <a href="#">Overview</a></li> <li><b>Goal Setting</b> Due Date 12/31/2022 <b>Update and Approve</b></li> <li>Nominate Participants Due Date 12/01/2022</li> <li>Review Participant Evaluations Due Date 12/31/2022</li> <li>Review Self Evaluation Due Date 12/31/2022</li> <li>Complete Manager Evaluation Due Date 12/31/2022</li> </ul>		<h3>WI Performance Review</h3> <div style="text-align: right;"><a href="#">Save</a> <a href="#">Approve</a></div> <div style="text-align: right;"><a href="#">Print</a>   <a href="#">Notify</a>   <a href="#">Export</a></div> <h4>Goal Setting - Update and Approve</h4> <div style="display: flex; justify-content: space-between;"> <div>  <p><b>Kyle Beck</b> Actions</p> </div> <div> <p>Job Title: FINANCIAL SPECIALIST            Document Type: WI Performance Review            Template: DOA - Performance Review            Status: In Progress</p> </div> <div> <p>Manager: Timothy Le Fave            Period: 01/01/2022 - 12/31/2022            Document ID: 959            Due Date: 12/31/2022</p> </div> </div> <ol style="list-style-type: none"> <li>Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.</li> <li>Make any necessary adjustments to the criteria and review your changes with the employee.</li> <li>Once the performance criteria is correct select the approve button to complete this step.</li> </ol> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span>WI Core Competencies</span> <span>Individual Goals</span> <span>Training/Development</span> </div> <div style="margin-top: 10px;"> <p>▼ Section 1 - Wisconsin Core Competencies</p> <p>Wisconsin Core Competencies will be evaluated by: Employee, Manager</p> <p>Expand   Collapse</p> <ul style="list-style-type: none"> <li>▶ <b>Accountability</b></li> <li>▶ <b>Communication</b></li> <li>▶ <b>Customer Service</b></li> <li>▶ <b>Interpersonal Skills</b></li> </ul> </div>			

## 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:

The screenshot displays the 'Performance Process' interface. The main header is 'Performance Process' with a green background. Below it, the 'Steps and Tasks' sidebar on the left lists several steps: 'Goal Setting' (highlighted with a red box and 'Update and Approve' sub-step), 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main content area is titled 'WI Performance Review' and 'Goal Setting - Update and Approve'. It shows a profile for Kyle Beck, Job Title 'FINANCIAL SPECIALIST', and Manager 'Timothy Le Fave'. A list of instructions is provided: 1. Review performance criteria, 2. Make necessary adjustments, and 3. Select the approve button. Below the instructions are tabs for 'WI Core Competencies', 'Individual Goals', and 'Training/Development'. The 'WI Core Competencies' section is expanded to show 'Section 1 - Wisconsin Core Competencies' with a list of competencies: Accountability, Communication, Customer Service, and Interpersonal Skills.

## 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.

This close-up screenshot shows the 'WI Core Competencies' tab selected. Under 'Section 1 - Wisconsin Core Competencies', it states 'Wisconsin Core Competencies will be evaluated by: Employee, Manager'. There are 'Expand' and 'Collapse' links, with 'Expand' highlighted by a red box. Below this, the 'Accountability' competency is expanded, showing a description: 'Description : Accepts responsibility for all assigned work activities. Follows through on commitments. Implements decisions that have been agreed upon. Acknowledges and learns from mistakes without blaming others. Recognizes the impact of one's behavior on others. Balances workload and priorities effectively.' At the bottom, it shows 'Created By Template' and a timestamp '02/22/2022 8:51PM'.


## 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.

### Goal Setting - Update and Approve

Print | Notify | Export

Kyle Beck  
Actions

	Job Title: FINANCIAL SPECIALIST	Manager: Timothy Le Fave
	Document Type: WI Performance Review	Period: 01/01/2022 - 12/31/2022
	Template: DOA - Performance Review	Document ID: 959
	Status: In Progress	Due Date: 12/31/2022

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

WI Core Competencies | **Individual Goals** | Training/Development

Section 2 - Individual Goals

Individual Goals will be evaluated by: Employee, Manager

**Add Item**

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).

### Team Performance

### Performance Process

Performance Process

Steps and Tasks

Kyle Beck  
WI Performance Review  
01/01/2022 - 12/31/2022  
Overview

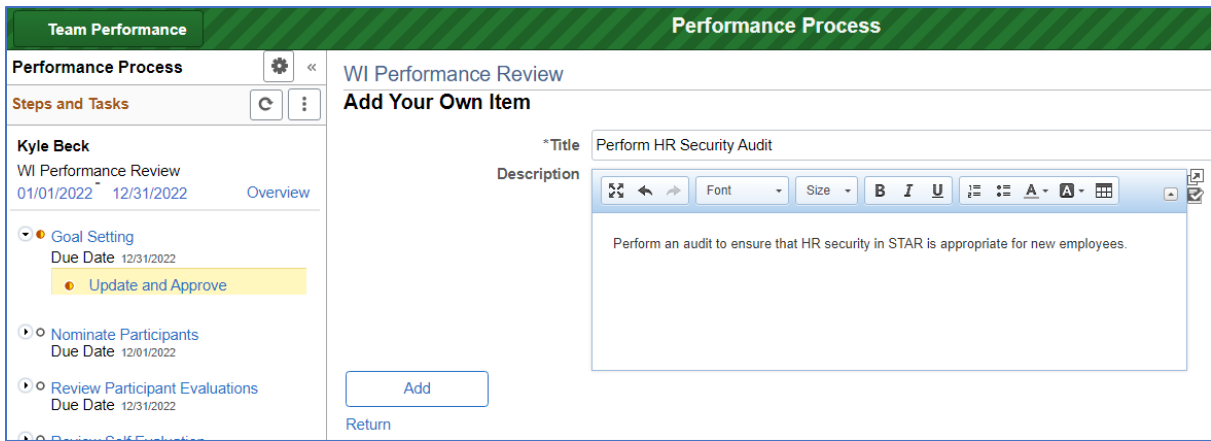
Goal Setting  
Due Date 12/31/2022  
Update and Approve

WI Performance Review  
**Add Item**

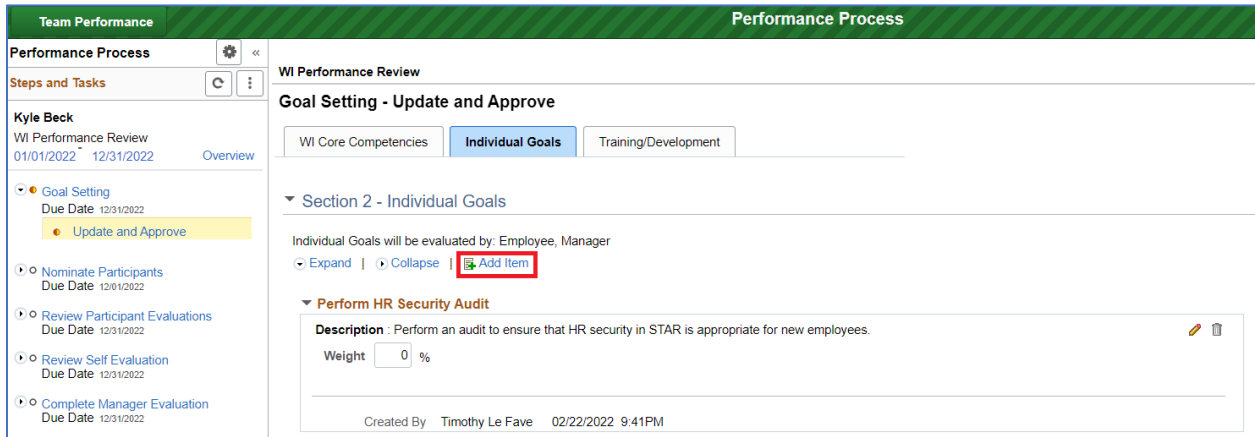
Add your own Item  
 Copy Item from My Team's Documents

**Next**  
Return

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

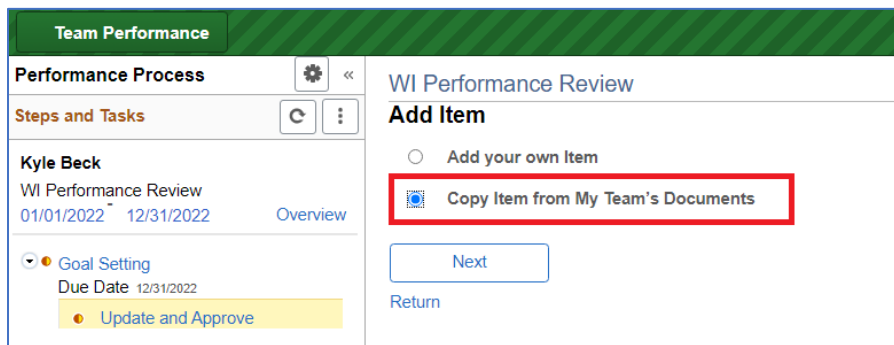


13. You can now view the added goal on the **Individual Goals** tab. Click on **Add Item** to add another goal/expectation. Repeat this process to enter all goals and expectations.



### 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.



Performance Document

### Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ **Filter Criteria**

First Name  Last Name

Document Type  Document Status

Period Between  -

**Performance Documents**

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="button" value="Select"/>	Kyle Beck	WI Performance Review	Evaluation in Progress	01/01/2022	12/31/2022

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.

Performance Document

### Copy Item from My Team’s Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

**Copy from Document**

Name Kyle Beck Document Type WIPRFREV

Section Individual Goals Content Type

Begin Date 01/01/2022 End Date 12/31/2022

**Individual Goals to be copied**

Individual Goals	
<input checked="" type="checkbox"/>	Perform HR Security Audit
<input checked="" type="checkbox"/>	Provide STAR Support

Select All Deselect All

### 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.

The screenshot shows the 'Performance Process' interface for 'Team Performance'. The main area is titled 'WI Performance Review' and 'Goal Setting - Update and Approve'. There are three tabs: 'WI Core Competencies', 'Individual Goals', and 'Training/Development'. The 'Individual Goals' tab is selected. Below the tabs, there is a section for 'Section 2 - Individual Goals'. Under this section, there are two goals listed:

- Perform HR Security Audit**: Description: Perform an audit to ensure that HR security in STAR is appropriate for new employees. Weight: 60%.
- Provide STAR support for agencies**: Description: Provide support for STAR to agency staff. This should focus on the HR and Payroll modules on STAR. Weight: 40%.

The weights '60%' and '40%' are highlighted with red boxes. The interface also shows a sidebar with 'Steps and Tasks' and a 'Performance Process' header.

## Training/Development Tab

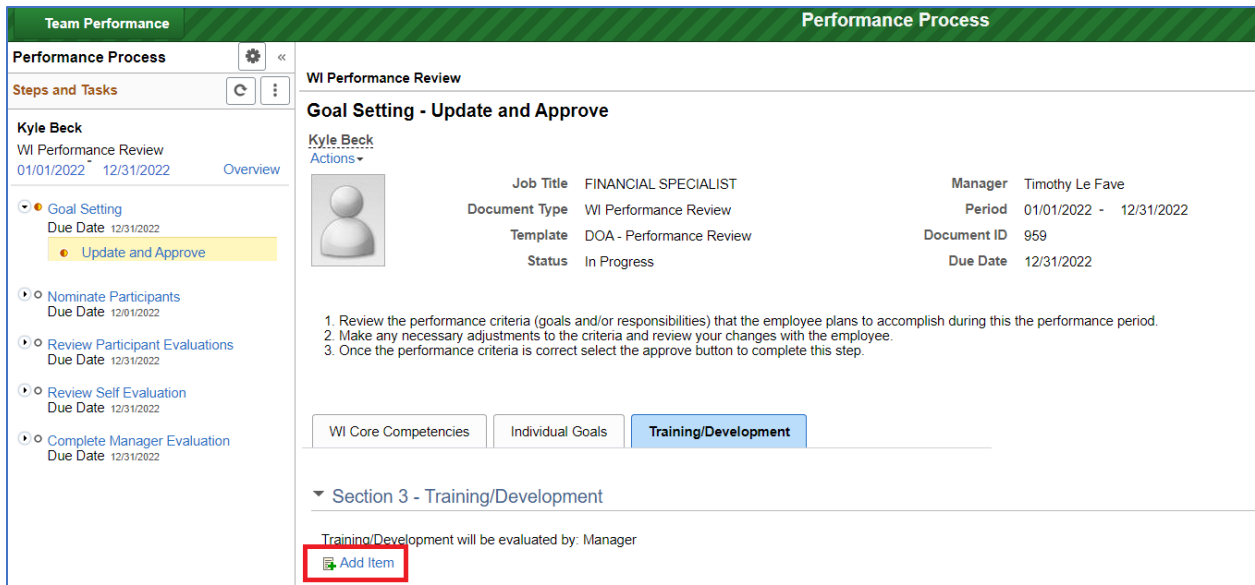
18. Once all Individual Goals are entered, you may navigate to the **Training/Development** tab.

The screenshot shows the 'Performance Process' interface for 'Team Performance'. The main area is titled 'WI Performance Review' and 'Goal Setting - Update and Approve'. There are three tabs: 'WI Core Competencies', 'Individual Goals', and 'Training/Development'. The 'Training/Development' tab is selected. Below the tabs, there is a section for 'Section 3 - Training/Development'. Under this section, there is a list of performance criteria:

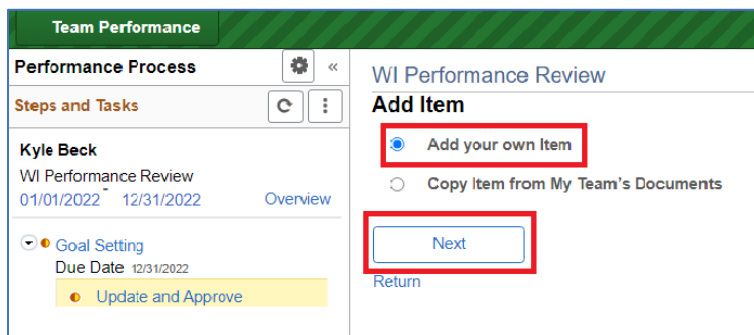
1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Below the list, there is an 'Add Item' button. The interface also shows a sidebar with 'Steps and Tasks' and a 'Performance Process' header.

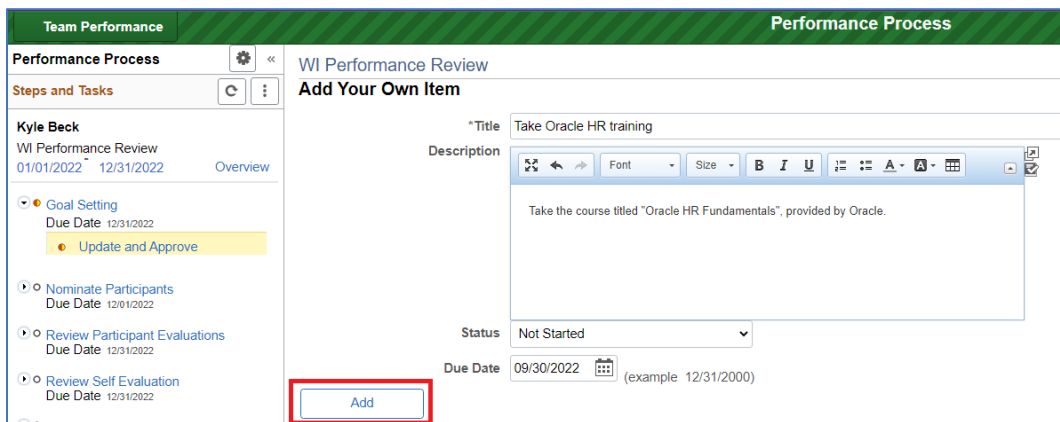
19. Click **Add Item** to add any Training or Development items in.



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**.

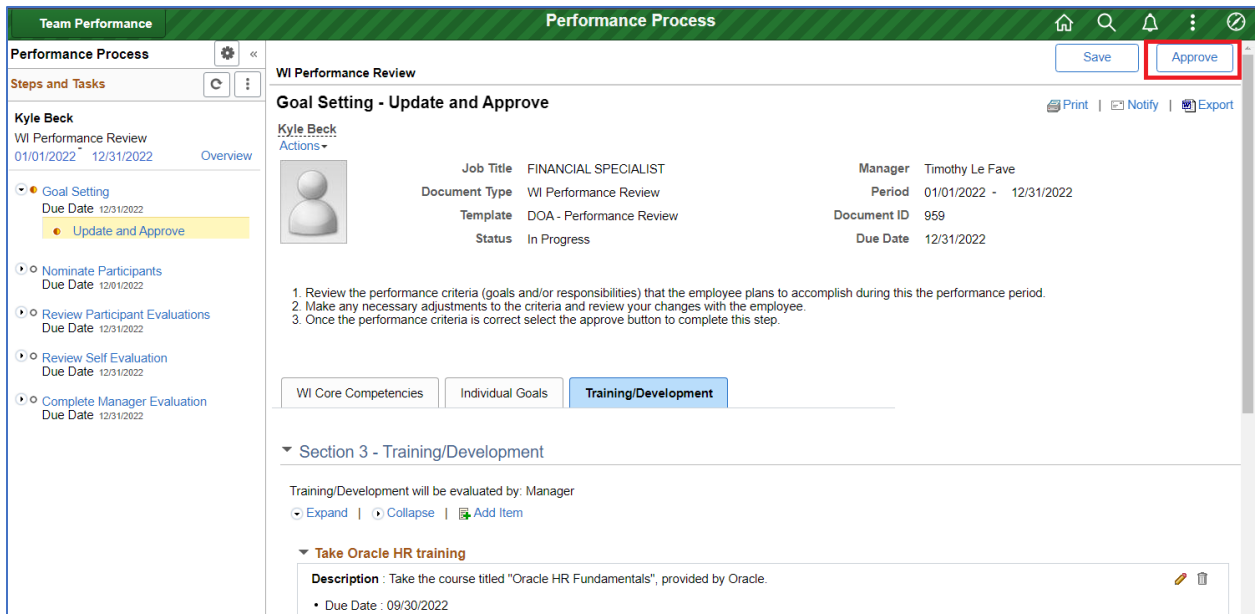


21. When adding your own item in, fill out the **Title** (name of the training), **Description** (any relevant details to the training), **Status** (selection of complete, in progress or not started made from the drop box) and **Due Date**. Then click **Add**.

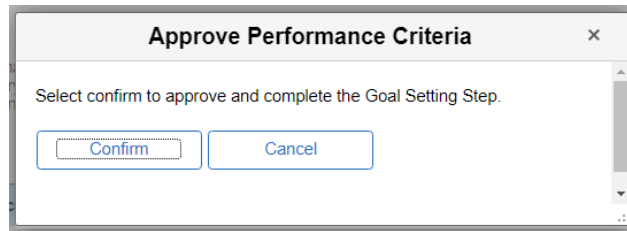


### Completing Goal Setting

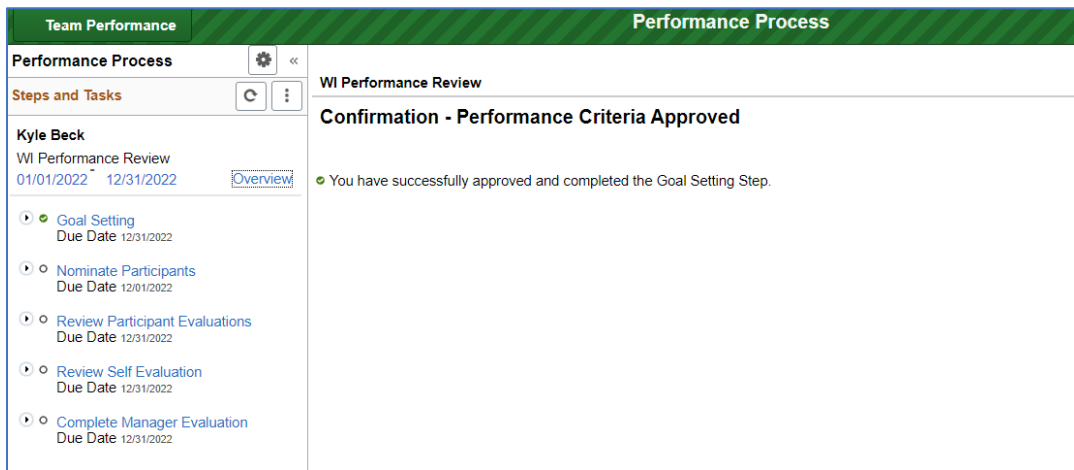
22. Once Goal setting is complete, you may click the **Approve** button in the upper right corner. Completing this step will notify the employee that their goals have been defined, and are now viewable in Employee Self Service.



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.

**Team Performance** | **Performance Process**

**Performance Process** [Settings] [Back]

**Steps and Tasks** [Refresh] [More]

**Kyle Beck**  
WI Performance Review  
01/01/2022 - 12/31/2022

- Goal Setting  
Due Date: 12/31/2022  
View  
**Reopen**
- Nominate Participants  
Due Date: 12/01/2022
- Review Participant Evaluations  
Due Date: 12/31/2022
- Review Self Evaluation  
Due Date: 12/31/2022
- Complete Manager Evaluation  
Due Date: 12/31/2022

**WI Performance Review**

**Goal Setting - Reopen** [Print] [Notify] [Export]

**Kyle Beck**  
Actions

Job Title	FINANCIAL SPECIALIST	Manager	Timothy Le Fave
Document Type	WI Performance Review	Period	01/01/2022 - 12/31/2022
Template	DOA - Performance Review	Document ID	959
Status	Completed	Due Date	12/31/2022

This is a copy of the approved performance criteria.

**WI Core Competencies** | Individual Goals | Training/Development

Section 1 - Wisconsin Core Competencies

Wisconsin Core Competencies will be evaluated by: Employee, Manager

Expand | Collapse

Accountability

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.

**Team Performance** | **Performance Process**

**Performance Process** [Settings] [Back]

**Steps and Tasks** [Refresh] [More]

**Kyle Beck**  
WI Performance Review  
01/01/2022 - 12/31/2022

- Goal Setting  
Due Date: 12/31/2022  
Update and Approve
- Nominate Participants  
Due Date: 12/01/2022
- Review Participant Evaluations  
Due Date: 12/31/2022
- Review Self Evaluation  
Due Date: 12/31/2022
- Complete Manager Evaluation  
Due Date: 12/31/2022

**WI Performance Review**

**Goal Setting - Update and Approve** [Save] [Approve] [Print] [Notify] [Export]

**Kyle Beck**  
Actions

Job Title	FINANCIAL SPECIALIST	Manager	Timothy Le Fave
Document Type	WI Performance Review	Period	01/01/2022 - 12/31/2022
Template	DOA - Performance Review	Document ID	959
Status	In Progress	Due Date	12/31/2022

- Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
- Make any necessary adjustments to the criteria and review your changes with the employee.
- Once the performance criteria is correct select the approve button to complete this step.

**WI Core Competencies** | Individual Goals | Training/Development

Section 1 - Wisconsin Core Competencies

Wisconsin Core Competencies will be evaluated by: Employee, Manager

## 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.

Back **Create Documents** Create

Period Begin Date 01/01/2022

Period End Date 12/31/2022

Document Type WI Performance Review

Clone from Prior Document **Yes**

Prior Document

**Selected Employees**

Name	Job Title
Lisa Tesch	ERP SUPERVISOR

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.

Cancel **Lookup**

Search for: Prior Document

**Search Criteria**

**Search Results**

Document ID	Evaluatee	Template Description	Period Begin Date	Period End Date	Document Status
959	Kyle Beck	DOA - Performance Review	01/01/2022	12/31/2022	Evaluation in Progress

1 row

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

Back
**Create Documents**
Create

Period Begin Date

Period End Date

Document Type

Clone from Prior Document  Yes

Prior Document

01/01/2022 12/31/2022 DOA - Performance Review

**Selected Employees**

Name	Job Title
Lisa Tesch	ERP SUPERVISOR

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**.

**Team Performance** | **Performance Process**

**Performance Process**

**Steps and Tasks**

- Goal Setting (Due Date: 12/29/2022)
- Nominate Participants** (Due Date: 11/29/2022)
- Review Participant Evaluations (Due Date: 12/29/2022)

**WI Performance Review**

**Nominate Participants - Add Nominees**

**Kyle Beck**  
Actions

Job Title: FINANCIAL SPECIALIST  
Document Type: WI Performance Review  
Template: DOA - Performance Review  
Status: In Progress

Manager: Timothy Le Fave  
Period: 01/01/2022 - 12/29/2022  
Document ID: 964  
Due Date: 11/29/2022

**Participant Role: Co-Worker**  
Minimum Required: 0 Maximum Available: 10  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Co-Worker

**Participant Role: Direct Report**  
Minimum Required: 0 Maximum Available: 10  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Direct Report

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.

**Team Performance** | **Performance Process**

**Performance Process**

**Steps and Tasks**

- Goal Setting (Due Date: 12/29/2022)
- Nominate Participants** (Due Date: 11/29/2022)
- Review Participant Evaluations (Due Date: 12/29/2022)

**WI Performance Review**

**Nominate Participants - Add Nominees**

**Kyle Beck**  
Actions

Job Title: FINANCIAL SPECIALIST  
Document Type: WI Performance Review  
Template: DOA - Performance Review  
Status: In Progress

Manager: Timothy Le Fave  
Period: 01/01/2022 - 12/29/2022  
Document ID: 964  
Due Date: 11/29/2022

**Participant Role: Co-Worker**  
Minimum Required: 0 Maximum Available: 10  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Co-Worker

**Participant Role: Direct Report**  
Minimum Required: 0 Maximum Available: 10  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Direct Report

**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.



**Person Search** [Close] [Help]

Nominate Participants  
 ▶ **Instructions**

**Search Criteria**

Name   
 Last Name LAUX  
 Second Last Name   
 First Name   
 ACName   
 Search

**Search Results**

<input type="checkbox"/>	Lynn Laux	<a href="#">i</a>
<input type="checkbox"/>	Patrick Laux	<a href="#">i</a>
<input checked="" type="checkbox"/>	Thomas Laux	<a href="#">i</a>

[Return to Previous Page](#)

**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:

**Person Search** [Close] [Help]

**Person Search**  
 Details for Thomas Laux

**Personal Data**

Description Contingent Worker

**Personal Data Details**

Type	CWR	Active
Department	505A300000	STAR
Location	MADEW0017	505 ADMINISTRATION BLDG

[Return to List](#)

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.

The screenshot shows the 'Performance Process' interface for Lisa Tesch's WI Performance Review. The 'Steps and Tasks' sidebar on the left includes 'Goal Setting', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Nominate Participants - Add Nominees' section displays the nominee's details: Thomas Laux, Job Title: ERP SUPERVISOR, Manager: Timothy Le Fave, Document Type: WI Performance Review, Template: DOA - Performance Review, Status: In Progress, and Due Date: 12/01/2022. A 'Submit Nominations' button is highlighted with a red box in the top right corner.

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.

The screenshot shows the 'Performance Process' interface for Kyle Beck's WI Performance Review. The 'Steps and Tasks' sidebar on the left includes 'Goal Setting', 'Nominate Participants', 'Track Nominations', 'Review Participant Evaluations', and 'View'. The 'Nominate Participants - Track Nominations' section displays the nominee's details: Thomas Laux, Job Title: FINANCIAL SPECIALIST, Manager: Timothy Le Fave, Document Type: WI Performance Review, Template: DOA - Performance Review, Status: In Progress, and Due Date: 11/29/2022. The 'Track Nominations' button is highlighted with a red box. Below, the 'Nominations' table shows a nomination for Thomas Laux with a status of 'Pending' and a 'Cancel' button highlighted with a red box.

### 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**.

**Team Performance** | **Performance Process**

**Performance Process**

**Steps and Tasks**

- Kyle Beck  
WI Performance Review  
01/01/2022 - 12/29/2022
- Goal Setting  
Due Date 12/29/2022
- Nominate Participants  
Due Date 11/29/2022
- Review Participant Evaluations**  
Due Date 12/29/2022

**WI Performance Review**

**Manager Evaluation - Update and Share**

**Kyle Beck**  
Actions

**Job Title:** FINANCIAL SPECIALIST  
**Document Type:** WI Performance Review  
**Template:** DOA - Performance Review  
**Status:** Evaluation in Progress

**Manager:** Timothy Le Fave  
**Period:** 01/01/2022 - 12/29/2022  
**Document ID:** 964  
**Due Date:** 12/29/2022

**Other Participants**  
Thomas Laux - CONTRACTORS

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings | Cancel Evaluation

**View**

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

**Participant Evaluation**

Help

**Participant Evaluations**

Participant	Role	Status	Due Date
Thomas Laux	Direct Report	Completed	12/29/2022

Return

**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.

The screenshot displays the 'Performance Process' interface. On the left, a 'Steps and Tasks' sidebar lists several steps: 'Goal Setting' (Due Date: 12/29/2022), 'Nominate Participants' (Due Date: 11/29/2022), 'Review Participant Evaluations' (Due Date: 12/29/2022), and 'Review Self Evaluation' (Due Date: 12/29/2022). The 'Review Self Evaluation' step is highlighted with a red box and has a green checkmark next to it. Below this step is a 'View' link. The main content area shows 'Manager Evaluation - Update and Share' for 'Kyle Beck'. It includes a profile picture, job title 'FINANCIAL SPECIALIST', and manager 'Timothy Le Fave'. A table of metadata shows: Document Type: WI Performance Review, Period: 01/01/2022 - 12/29/2022, Template: DOA - Performance Review, Document ID: 964, Status: Evaluation in Progress, and Due Date: 12/29/2022. Below this is a section for 'Other Participants' with 'Thomas Laux - CONTRACTORS'. A text box prompts the user to 'Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.' Below the text box are 'Calculate All Ratings' and 'Cancel Evaluation' buttons. At the bottom, there are tabs for 'WI Core Competencies', 'Individual Goals', 'Training/Development', and 'Overall Summary'.

### 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.

The screenshot shows the 'Current Documents' page in the Manager Self Service interface. The page has a green header with 'Manager Self Service' and 'Team Performance'. On the left, there is a sidebar with navigation options: 'Current Documents', 'Delegated Documents', 'Historical Documents', and 'View-Only Documents'. The main content area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Kyle Beck FINANCIAL SPECIALIST	WI Performance Review	Evaluation in Progress	01/01/2022 12/29/2022	12/29/2022

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.

The screenshot shows the 'Manager Evaluation - Update and Share' page in the Performance Process interface. The page has a green header with 'Team Performance' and 'Performance Process'. On the left, there is a sidebar with 'Steps and Tasks' and a list of tasks for Kyle Beck: 'Goal Setting', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Complete Manager Evaluation' task is expanded to show 'Update and Share'. The main content area is titled 'Manager Evaluation - Update and Share' and shows the following information:

**WI Performance Review**

**Manager Evaluation - Update and Share**

**Kyle Beck**  
Actions -

Job Title: FINANCIAL SPECIALIST  
Document Type: WI Performance Review  
Template: DOA - Performance Review  
Status: Evaluation in Progress

Manager: Timothy Le Fave  
Period: 01/01/2022 - 12/29/2022  
Document ID: 964  
Due Date: 12/29/2022

**Other Participants**  
Thomas Laux - CONTRACTORS

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings | Cancel Evaluation

**WI Core Competencies** | Individual Goals | Training/Development | Overall Summary

**Section 1 - Wisconsin Core Competencies**

Expand | Collapse

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

Section 1 - Wisconsin Core Competencies

Expand | Collapse

**Accountability**

**Description** : Accepts responsibility for all assigned work activities. Follows through on commitments. Implements decisions that have been agreed upon. Acknowledges and learns from mistakes without blaming others. Recognizes the impact of one's behavior on others. Balances workload and priorities effectively.

Manager Rating: 3 - Successful Performance 3.00

Manager Comments: Kyle was accountable throughout the year.

Employee Comments: I feel that I was very accountable during the year. I always admit my mistakes and ask for feedback on how to improve

Created By: Template 02/23/2022 12:48PM

**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.

WI Core Competencies | **Individual Goals** | Training/Development | Overall Summary

Section 2 - Individual Goals

Expand | Collapse | Add Item

**Perform HR Security Audit**

**Description** : Perform an audit to ensure that HR security in STAR is appropriate for new employees.

Weight: 60 %

Manager Rating: 3 - Successful Performance 3.00

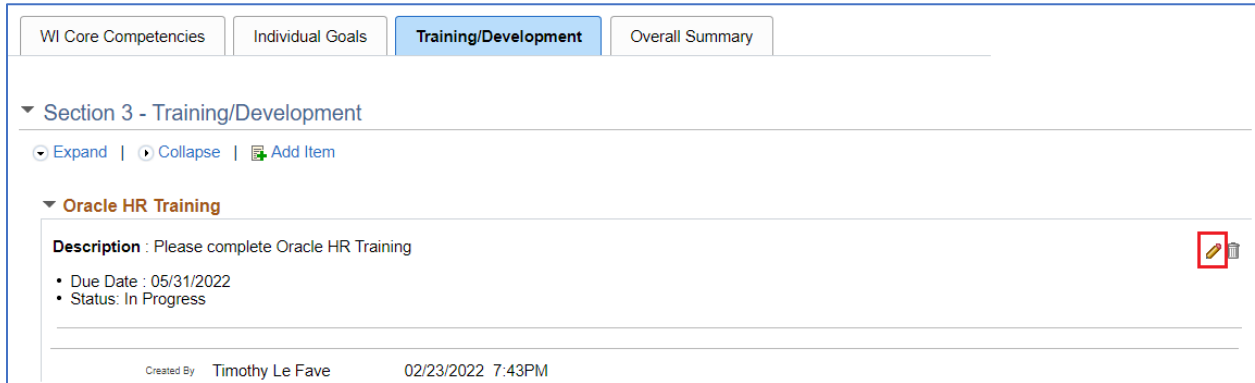
Manager Comments: Kyle

Employee Comments: I completed an audit on 6/30, and submitted the results to the HR Security team.

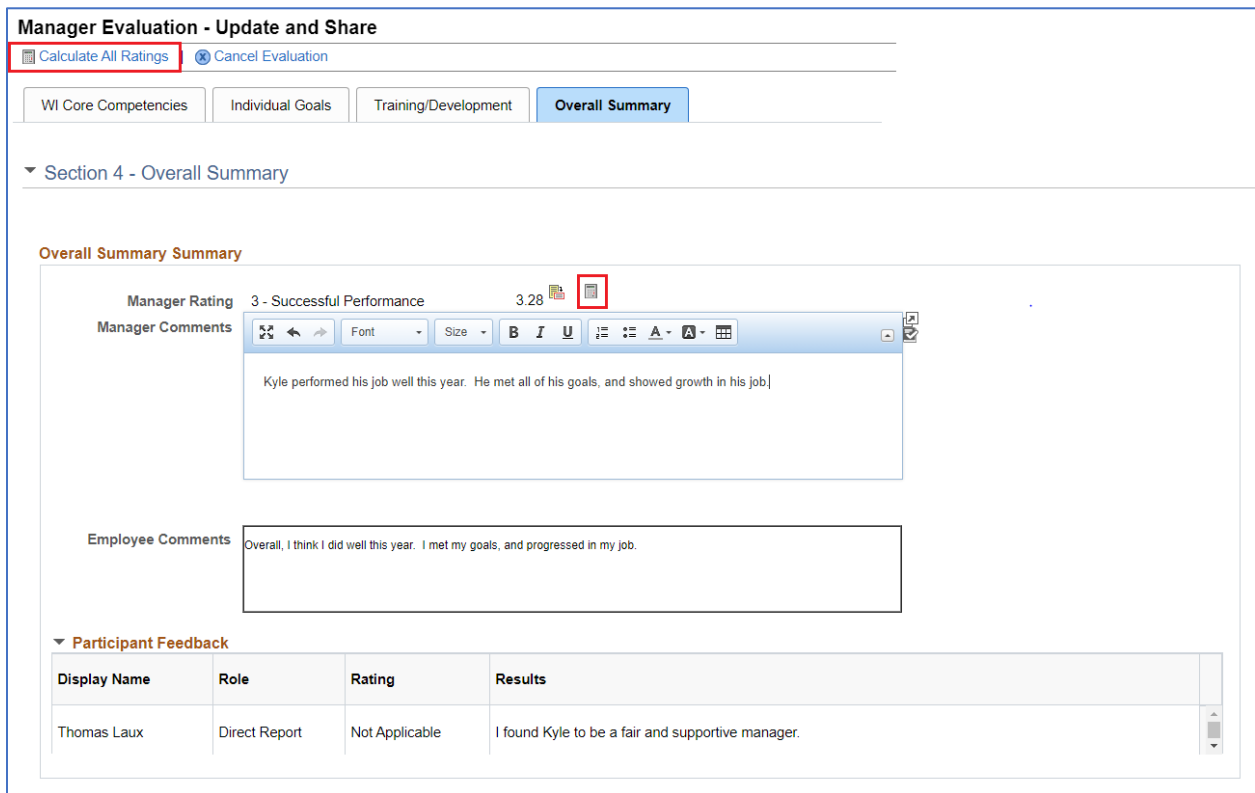
Created By: Timothy Le Fave 02/23/2022 9:43AM  
Last Modified By: Timothy Le Fave 02/23/2022 4:48PM

**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:



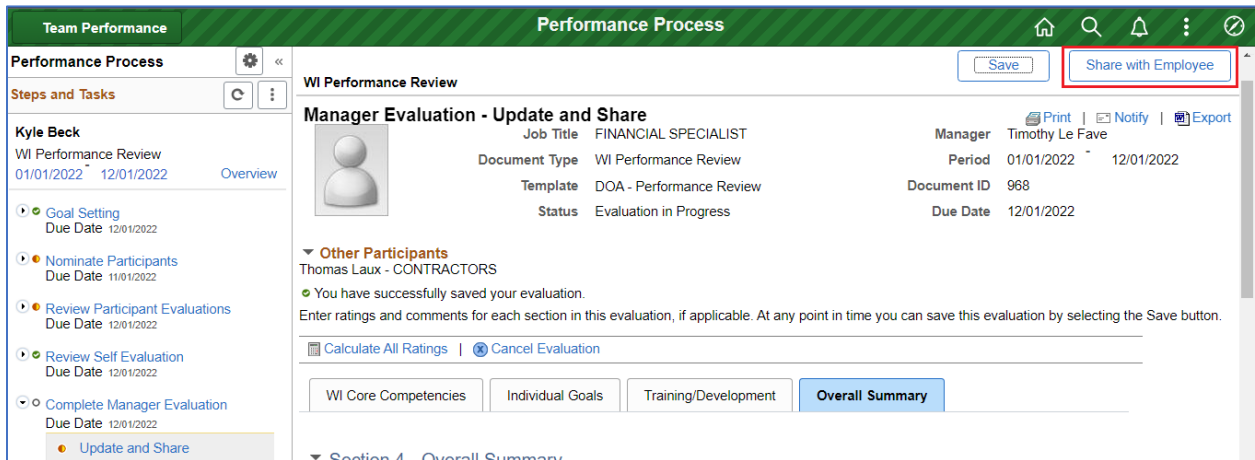
5. The final tab is the **Overall Summary** for the performance review. This is where the overall rating is assigned, as well as any overall comments you wish to provide. Depending on your agency's performance review, you may also see the comments entered by the employee and/or other participants.



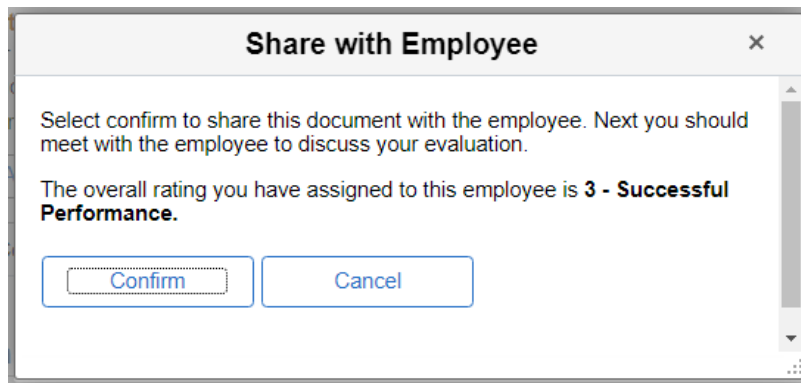
**Note:** If your agency uses a weighted performance review, you may also need to click the **Calculate All Ratings** link, or the calculator icon to have the system determine the Overall Rating.

## 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**.

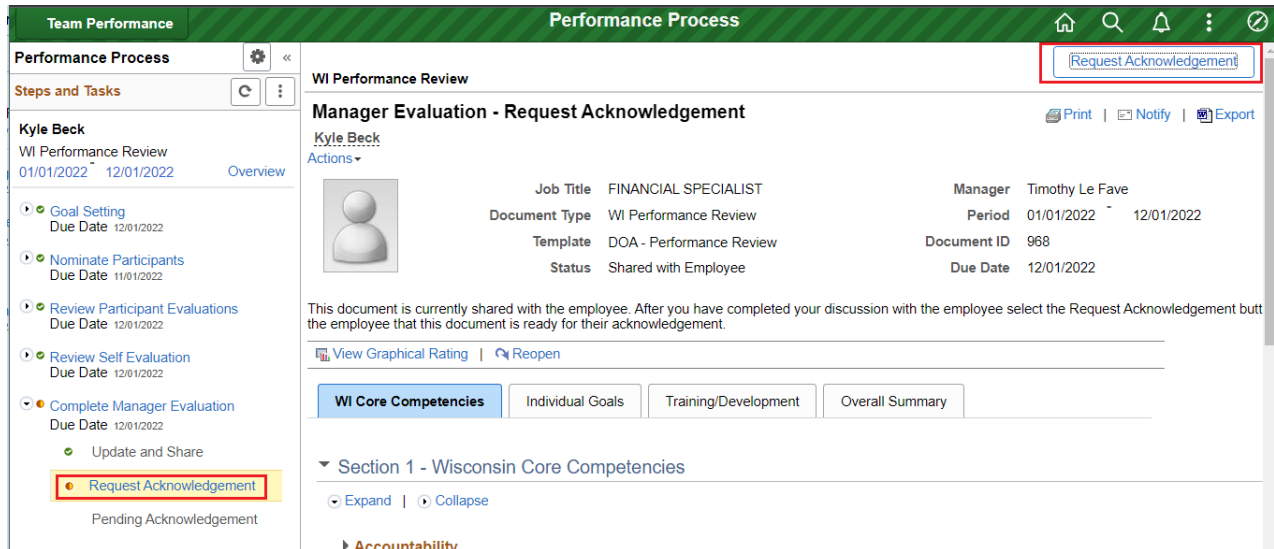


Once confirmed, an email notification will be sent the employee, letting them know they can view their performance review in **Employee Self Service**.



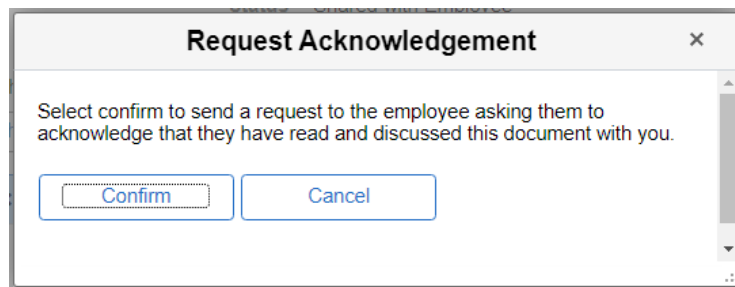
## Requesting Acknowledgement of a Review

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:



The screenshot displays the 'Performance Process' interface for a 'WI Performance Review'. The left sidebar, titled 'Steps and Tasks', lists several steps: 'Goal Setting', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Complete Manager Evaluation' step is expanded, showing sub-steps: 'Update and Share' and 'Request Acknowledgement'. The 'Request Acknowledgement' step is highlighted with a red box. The main content area shows the 'Manager Evaluation - Request Acknowledgement' page for Kyle Beck, including a profile picture, job title (FINANCIAL SPECIALIST), document type (WI Performance Review), and manager (Timothy Le Fave). A red box highlights the 'Request Acknowledgement' button in the top right corner of the main content area.

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



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:

The screenshot displays the 'Performance Process' interface. On the left, under 'Steps and Tasks', the 'Complete Manager Evaluation' section is expanded, and the 'Pending Acknowledgement' link is highlighted with a red box. In the top right corner of the main content area, the 'Override Acknowledgement' button is also highlighted with a red box. The main content area shows details for a 'Manager Evaluation - Pending Acknowledgement' for Kyle Beck, including job title, document type, manager, and status. A message states: 'This document is currently awaiting the employee's acknowledgement. If the employee can not or does not acknowledge this document you can select the Override Acknowledgement button and indicate the reason why you are overriding the employee's acknowledgement.'

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

The dialog box titled 'Override Employee Acknowledgement' contains the following text: 'You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so.' Below this text are two radio button options: 'Employee Not Available' (which is selected) and 'Employee Refused'. Further down, it says: 'Select confirm to move the document to the next status. Upon selecting confirm your electronic signature will be placed in the employee's signature section on this document with the reason why you are overriding the employee acknowledgement.' At the bottom of the dialog are two buttons: 'Confirm' and 'Cancel'.

## 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.

The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists 'Steps and Tasks' for 'Kyle Beck', with 'Update and Share' selected. The main area is titled 'Manager Evaluation - Update and Share' for 'Kyle Beck'. It displays a profile picture and a table of metadata:

Job Title	FINANCIAL SPECIALIST	Manager	Timothy Le Fave
Document Type	WI Performance Review	Period	01/01/2022 - 12/31/2022
Template	DOA - Performance Review	Document ID	959
Status	Evaluation in Progress	Due Date	12/31/2022

Below the metadata, there are buttons for 'Calculate All Ratings' and 'Cancel Evaluation' (highlighted with a red box). A 'Save' button is in the top right corner. The main content area shows 'Section 1 - Wisconsin Core Competencies' with an 'Accountability' sub-section.

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 cancellation of the document(s).

The screenshot shows the 'Cancel Documents' confirmation screen. A message states: 'You have chosen to cancel the document(s) listed. To confirm this cancellation, select the Save button.' Below the message is a table with one row:

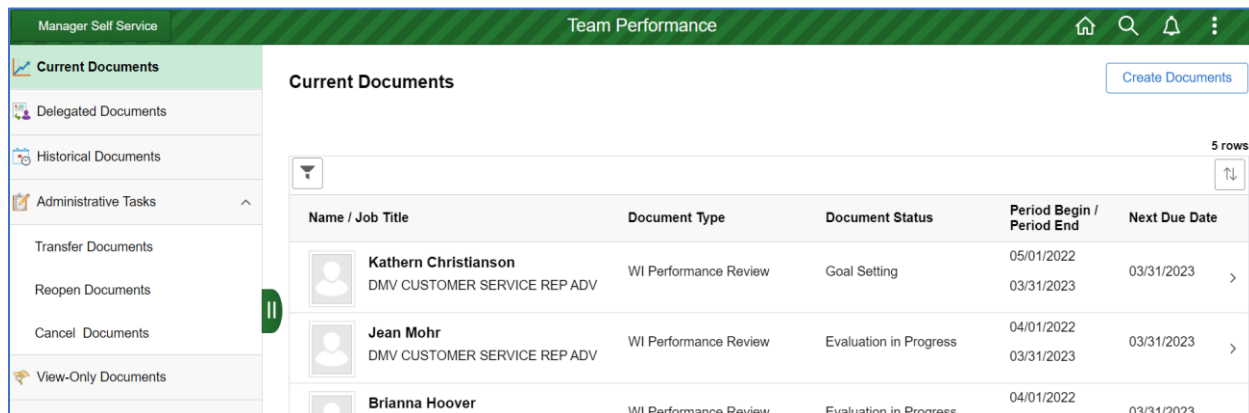
Name / Job Title	Document Type	Document Status	Period Begin / Period End
 Jean Mohr DMV CUSTOMER SERVICE REP ADV	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023

The 'Save' button is highlighted in blue in the top right corner.

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.

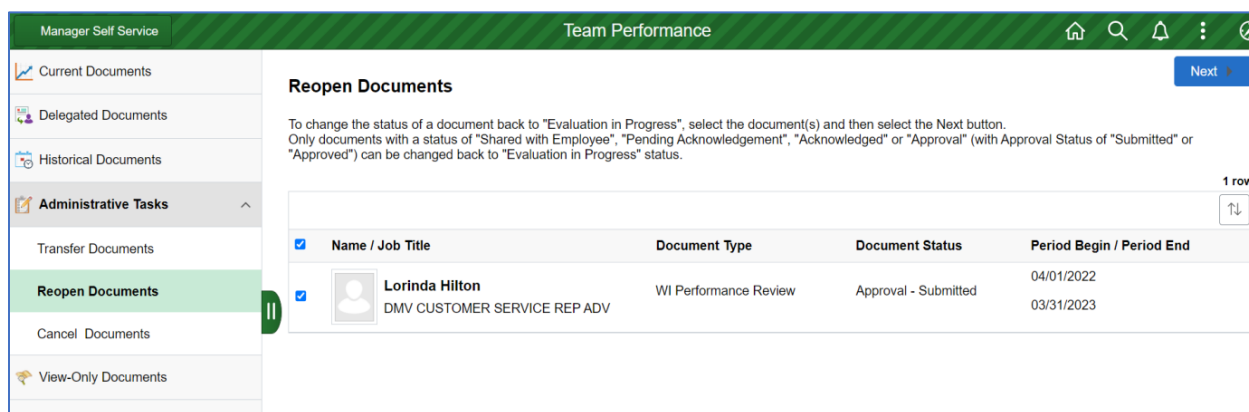
## Reopening Evaluations

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).

Manager Self Service Team Performance 🏠 🔍 🔔 ⋮ 🔄

- Current Documents
- Delegated Documents
- Historical Documents
- Administrative Tasks** ^
- Transfer Documents
- Reopen Documents
- Cancel Documents
- View-Only Documents

### Reopen Documents

You have chosen to change the status of the document(s) listed.  
To confirm this status change, select the Save button.

Previous ◀ Save

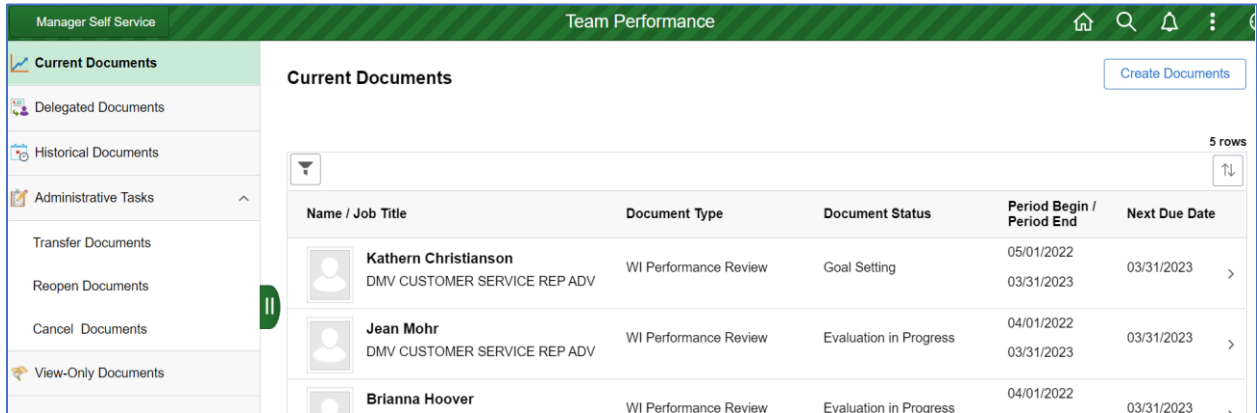
Name / Job Title	Document Type	Document Status	Period Begin / Period End
<b>Lorinda Hilton</b> DMV CUSTOMER SERVICE REP ADV	WI Performance Review	Approval - Submitted	04/01/2022 03/31/2023

1 row ↕

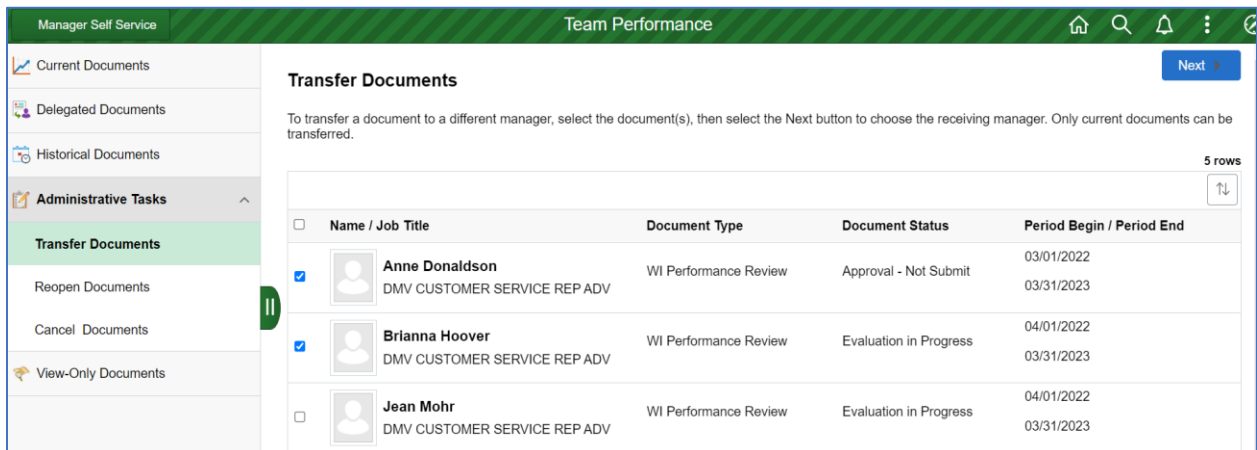
4. A confirmation message will briefly appear at the top of the page and then disappear. Then, when you navigate to your Current Documents list, you will be able to see the document(s).

# Transferring Evaluations

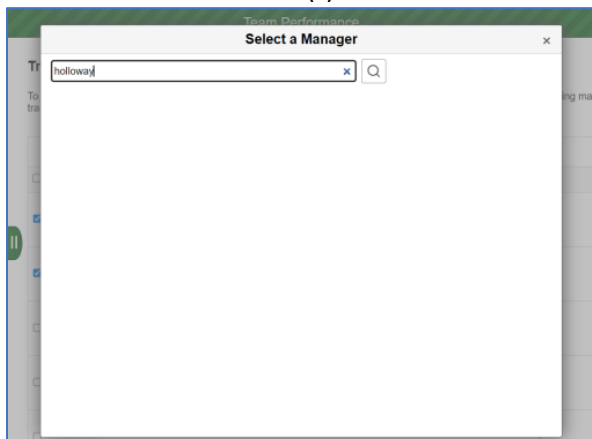
1. To transfer a document to a different supervisor, use the above instructions to navigate to the Performance Administration tile. There, click on **Administrative Tasks** on the left side of the screen, and when the options drop down, select **Transfer Documents**.



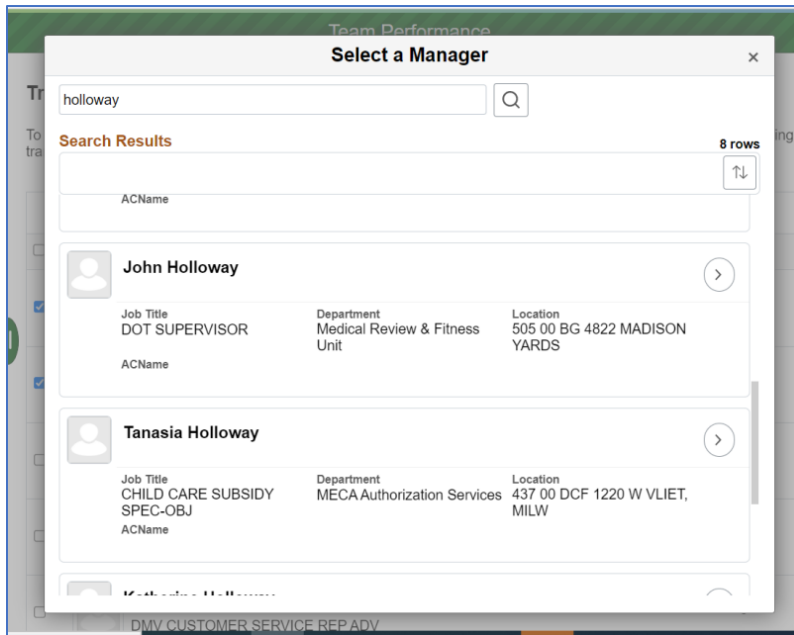
2. A list of your documents will show up. There, you check the box next to the document(s) you want transfer and then click **Next** in the upper right-hand corner of the page.



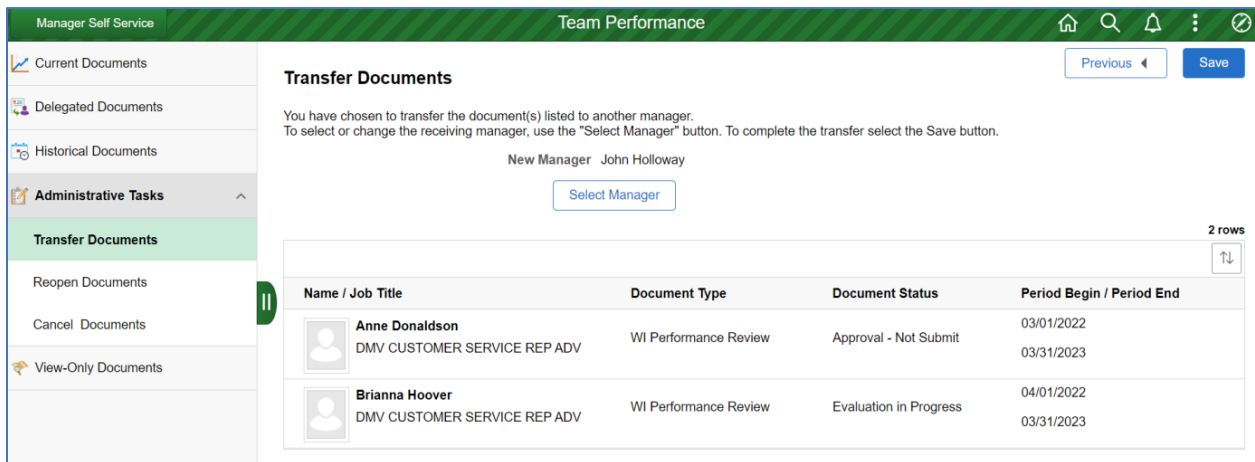
3. A Select a Manager box will pop up on the screen. There, type in the name of the manager you wish to transfer the document(s) to and click the search icon.



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.



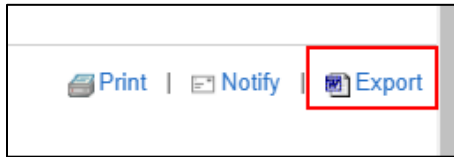
4. The next screen will show the selected manager that the document(s) will be transferred to, along with the document(s) below. If that information is correct, click **Save** in the upper right -hand side of the page.



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 a PDF document that can be downloaded and/or printed.

