

# STAR ePerformance Job Aid – Supervisor

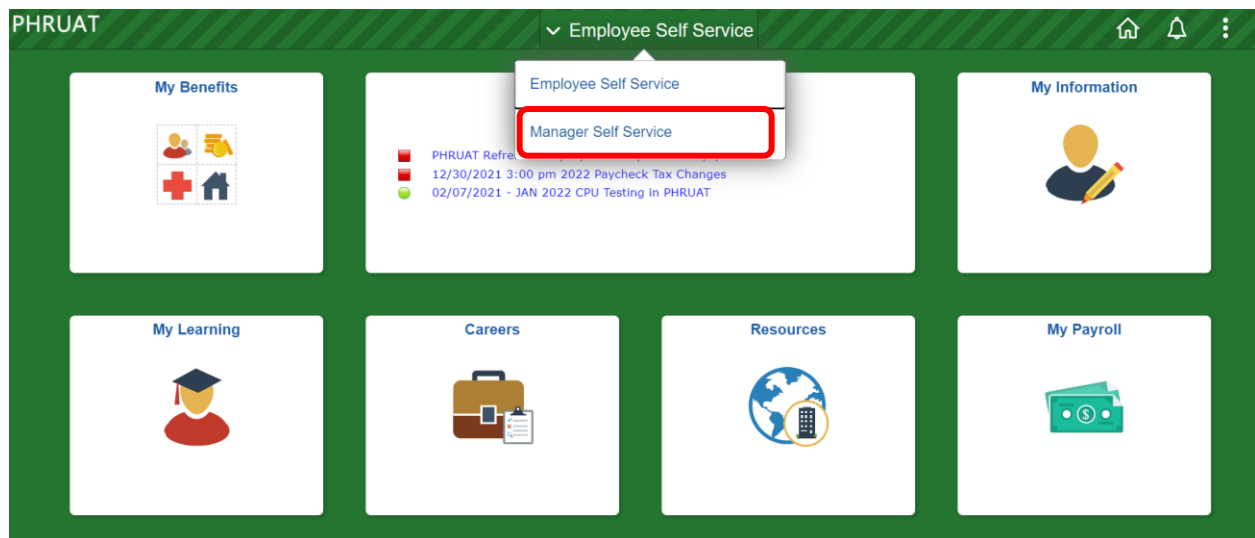
## Contents

Creating New Performance Documents: .....	2
Goal Setting:.....	6
WI Core Competencies .....	6
Individual Goals Tab .....	7
Copying Goals from Another Employee.....	8
Weighting Goals .....	9
Training/Development Tab .....	10
Completing Goal Setting .....	11
Reopening Goal Setting.....	12
Cloning an Evaluation .....	14
Peer/360 Reviews .....	16
Nominating Participants .....	16
Reviewing or Cancelling Nominations .....	18
Viewing Participant Evaluation Status .....	18
Employee Self Evaluations .....	20
Completing a Performance Review.....	21
Sharing a Review with an Employee .....	25
Requesting Acknowledgement of a Review.....	26
Overriding Acknowledgements.....	27
Employee Rebuttals .....	28
Canceling Evaluations .....	28
Reopening Evaluations.....	29
Transferring Evaluations .....	31
Exporting and Printing Evaluations.....	33

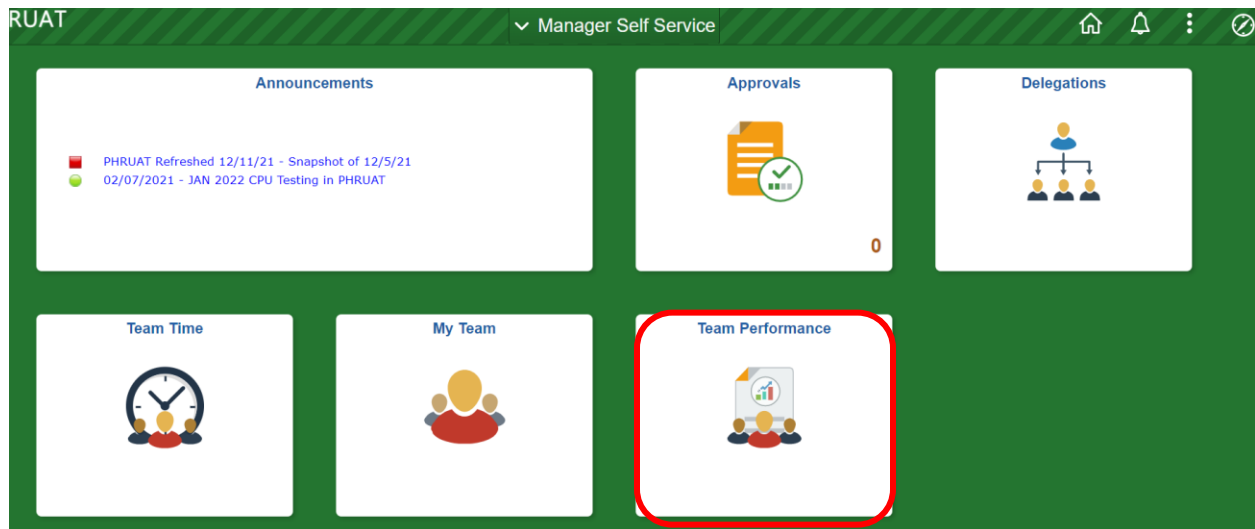
## Creating New Performance Documents:

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.

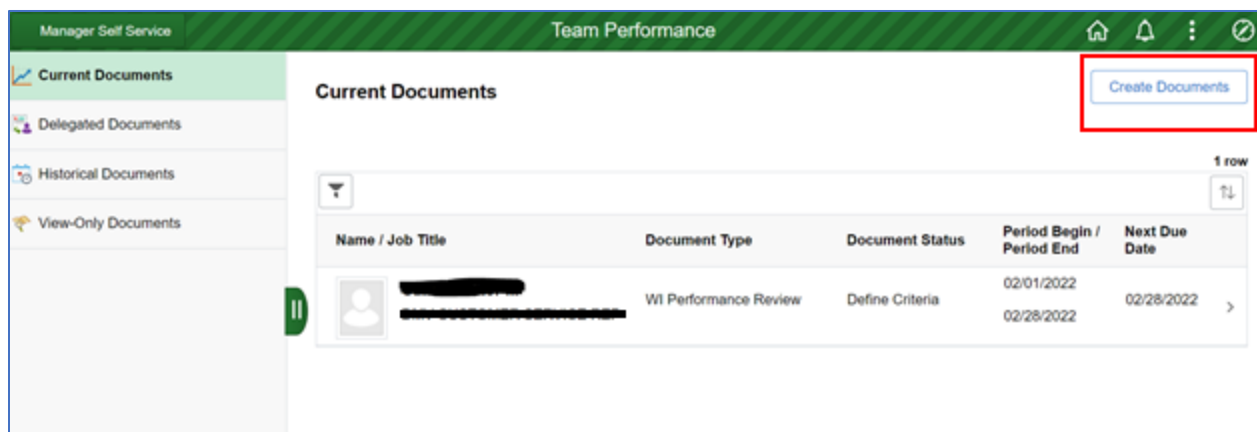


2.) Once on the Manager Self Service homepage, you will notice the “Team Performance” tile. This is how you will create and manage all reviews for your team.

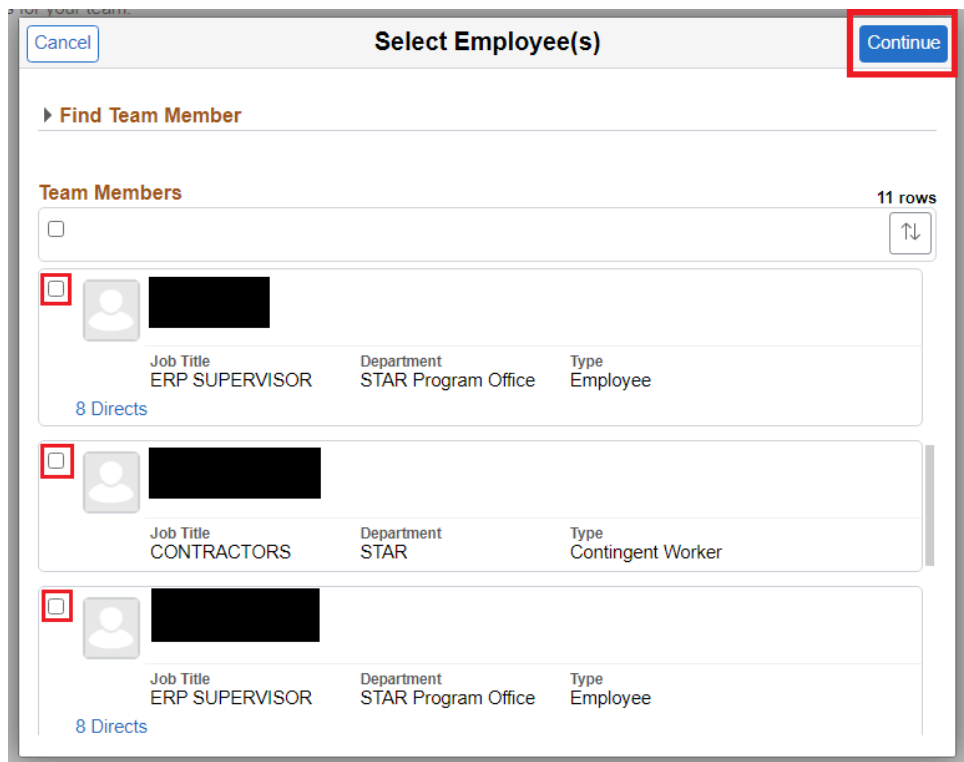


3.) On the “Team Performance” page, you will see some options on the left of the screen. Most often you will be working in the “Current Documents” section, which will show all Performance Reviews currently in progress.

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:

- Period Begin Date
- Period End Date
- Document Type → Wisconsin Performance Evaluation
- 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

Current Documents

Delegated Documents

Historical Documents

View-Only Documents

Current Documents

Create Documents

1 row

Name / Job Title

Document Type

Document Status

Period Begin / Period End

Next Due Date

Kyle Beck

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		<a href="#">Home</a> <a href="#">Search</a> <a href="#">Notifications</a> <a href="#">More</a>	
<b>Performance Process</b>		<b>WI Performance Review</b> <a href="#">Save</a> <a href="#">Approve</a>			
<b>Steps and Tasks</b>		<b>Goal Setting - Update and Approve</b> <a href="#">Print</a>   <a href="#">Notify</a>   <a href="#">Export</a>			
<b>Kyle Beck</b> WI Performance Review 01/01/2022 - 12/31/2022 <a href="#">Overview</a>		<div>  <div> <b>Kyle Beck</b>            FINANCIAL SPECIALIST            Manager: Timothy Le Fave            Document Type: WI Performance Review            Template: DOA - Performance Review            Status: In Progress            Period: 01/01/2022 - 12/31/2022            Document ID: 959            Due Date: 12/31/2022         </div> </div>			
<ul style="list-style-type: none"> <li> <b>Goal Setting</b>            Due Date: 12/31/2022            Update and Approve         </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>		<div> <div> <b>WI Core Competencies</b> Individual Goals           Training/Development         </div> <div> <b>Section 1 - Wisconsin Core Competencies</b>            Wisconsin Core Competencies will be evaluated by: Employee, Manager  <a href="#">Expand</a>   <a href="#">Collapse</a> <ul style="list-style-type: none"> <li>Accountability</li> <li>Communication</li> <li>Customer Service</li> <li>Interpersonal Skills</li> </ul> </div> </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. On the left, a sidebar lists 'Steps and Tasks' for 'Kyle Beck's 'WI Performance Review' (01/01/2022 - 12/31/2022). The 'Goal Setting' step is highlighted with a red box, and its sub-step 'Update and Approve' is highlighted with a yellow box. The main content area is titled 'Goal Setting - Update and Approve' and includes a 'Save' button and an 'Approve' button. Below the title, there are fields for 'Job Title' (FINANCIAL SPECIALIST), 'Document Type' (WI Performance Review), 'Template' (DOA - Performance Review), and 'Status' (In Progress). To the right, there are fields for 'Manager' (Timothy Le Fave), 'Period' (01/01/2022 - 12/31/2022), 'Document ID' (959), and 'Due Date' (12/31/2022). A list of instructions is provided: 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 instructions, there are tabs for 'WI Core Competencies', 'Individual Goals', and 'Training/Development'. The 'WI Core Competencies' tab is selected, showing a section titled 'Section 1 - Wisconsin Core Competencies'. Under this section, it states 'Wisconsin Core Competencies will be evaluated by: Employee, Manager' and provides links to 'Expand' and 'Collapse'. Below this, there are four competency categories: 'Accountability', 'Communication', 'Customer Service', and 'Interpersonal Skills', each with a right-pointing arrow.

## 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 screenshot shows a close-up of the 'WI Core Competencies' section. It features three tabs: 'WI Core Competencies', 'Individual Goals', and 'Training/Development'. The 'WI Core Competencies' tab is selected. Below the tabs, there is a section titled 'Section 1 - Wisconsin Core Competencies'. Under this section, it states 'Wisconsin Core Competencies will be evaluated by: Employee, Manager' and provides links to 'Expand' and 'Collapse'. The 'Expand' link is highlighted with a red box. Below this, the 'Accountability' competency is expanded, showing a detailed 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, there is a footer area with 'Created By' and 'Template' fields, 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

Document Type

WI Performance Review

Manager

Timothy Le Fave

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.

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

**Performance Process** **WI Performance Review**

**Steps and Tasks** **Add Your Own Item**

**Kyle Beck**  
WI Performance Review  
01/01/2022 12/31/2022 [Overview](#)

- 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

**Title** Perform HR Security Audit

**Description**

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

[Add](#) [Return](#)

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.

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

**Performance Process** **WI Performance Review**

**Steps and Tasks** **Goal Setting - Update and Approve**

**Kyle Beck**  
WI Performance Review  
01/01/2022 12/31/2022 [Overview](#)

- 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 Core Competencies **Individual Goals** Training/Development

**Section 2 - Individual Goals**

Individual Goals will be evaluated by: Employee, Manager

[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** 0 %

Created By Timothy Le Fave 02/22/2022 9:41PM

## 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:

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

**Performance Process** **WI Performance Review**

**Steps and Tasks** **Add Item**

**Kyle Beck**  
WI Performance Review  
01/01/2022 12/31/2022 [Overview](#)

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

☐ Add your own Item

☒ **Copy Item from My Team's Documents**

[Next](#) [Return](#)

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**

1-2 of 2

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**

1-2 of 2

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

## 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.

**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
- 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**

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

**Section 2 - Individual Goals**

Individual Goals will be evaluated by: Employee, Manager

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 %

Created By Timothy Le Fave 02/22/2022 9:41PM

**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 %

Created By Timothy Le Fave 02/22/2022 9:44PM

## Training/Development Tab

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

**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
- 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**

**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 3 - Training/Development**

Training/Development will be evaluated by: Manager

Add Item

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

**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**
- 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**

**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 - 12/31/2022  
Document ID: 959  
Due Date: 12/31/2022

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this 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 3 - Training/Development**

Training/Development will be evaluated by: Manager

**Add Item**

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**.

**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**
- Nominate Participants  
Due Date: 12/01/2022
- Review Participant Evaluations  
Due Date: 12/31/2022
- Review Self Evaluation  
Due Date: 12/31/2022

**WI Performance Review**

**Add Item**

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

**Next**  
Return

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**.

**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**
- Nominate Participants  
Due Date: 12/01/2022
- Review Participant Evaluations  
Due Date: 12/31/2022
- Review Self Evaluation  
Due Date: 12/31/2022

**WI Performance Review**

**Add Your Own Item**

\*Title: Take Oracle HR training

Description: Take the course titled "Oracle HR Fundamentals", provided by Oracle.

Status: Not Started

Due Date: 09/30/2022 (example: 12/31/2000)

**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.

**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**
- 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**

**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 - 12/31/2022  
Document ID: 959  
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 3 - Training/Development**

Training/Development will be evaluated by: Manager  
[Expand](#) | [Collapse](#) | [Add Item](#)

**Take Oracle HR training**

**Description:** Take the course titled "Oracle HR Fundamentals", provided by Oracle.  
Due Date: 09/30/2022

[Save](#) [Approve](#)

[Print](#) | [Notify](#) | [Export](#)

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

**Approve Performance Criteria**

Select confirm to approve and complete the Goal Setting Step.

[Confirm](#) [Cancel](#)

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

**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
- 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**

**Confirmation - Performance Criteria Approved**

You have successfully approved and completed the Goal Setting Step.

## 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**

**Steps and Tasks**

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

**Goal Setting**  
Due Date 12/31/2022

[View](#)

[Reopen](#)

**WI Performance Review**

**Goal Setting - Reopen**

**Kyle Beck**  
Actions

Job Title FINANCIAL SPECIALIST  
Document Type WI Performance Review  
Template DOA - Performance Review  
Status Completed

Manager Timothy Le Fave  
Period 01/01/2022 - 12/31/2022  
Document ID 959  
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**

**Steps and Tasks**

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

**Goal Setting**  
Due Date 12/31/2022

[Update and Approve](#)

**WI Performance Review**

**Goal Setting - Update and Approve**

**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 - 12/31/2022  
Document ID 959  
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 1 - Wisconsin Core Competencies**

Wisconsin Core Competencies will be evaluated by: Employee, Manager

[Save](#) [Approve](#)

## 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.

**Create Documents**

Period Begin Date: 01/01/2022

Period End Date: 12/31/2022

Document Type: WI Performance Review

Clone from Prior Document: **Yes**

Prior Document: [Magnifying Glass Icon]

**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.

**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

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

01/01/2022

Period End Date

12/31/2022

Document Type

WI Performance Review

Clone from Prior Document

Yes

Prior Document

Kyle Beck

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**

**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
- Add Nominees**
- Track Nominations
- Review Participant Evaluations  
Due Date 12/29/2022
- View

**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**  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Co-Worker

**Participant Role: Direct Report**  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Direct Report

Minimum Required: 0 Maximum Available: 10

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**

**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
- Add Nominees**
- Track Nominations
- Review Participant Evaluations  
Due Date 12/29/2022
- View

**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**  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Co-Worker

**Participant Role: Direct Report**  
**Nominations**  
Currently there are no nominees in your nomination list.  
+ Add Direct Report

Minimum Required: 0 Maximum Available: 10

**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

Person Search

Nominate Participants

Instructions

Search Criteria

Name

Last NameLAUX

Second Last Name

First Name

ACName

Search

Search Results

<input type="checkbox"/>	Lynn Laux	
<input type="checkbox"/>	Patrick Laux	
<input checked="" type="checkbox"/>	Thomas Laux	

OK

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

Person Search

Details for Thomas Laux

Personal Data

DescriptionContingent Worker

Personal Data Details

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

Select This Person

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.

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

**Performance Process** **WI Performance Review** Save Submit Nominations

**Steps and Tasks**

**Lisa Tesch**  
WI Performance Review  
01/01/2022 - 12/31/2022

- Goal Setting  
Due Date 12/31/2022
- 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

**Nominate Participants - Add Nominees**

**Lisa Tesch**  
Actions

Job Title: ERP SUPERVISOR  
Document Type: WI Performance Review  
Template: DOA - Performance Review  
Status: In Progress

Manager: Timothy Le Fave  
Period: 01/01/2022 - 12/31/2022  
Document ID: 960  
Due Date: 12/01/2022

You have selected nominations for addition. The nominations will be added when the transaction is saved.

Participant Role: Direct Report  
Minimum Required: 0 Maximum Available: 10

Nominee	Delete
Thomas Laux	

+ Add Direct Report

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.

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

**Performance Process** **WI Performance Review**

**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

**Nominate Participants - Track Nominations**

**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  
Participant Role: Direct Report  
Minimum Required: 0 Maximum Available: 10  
Minimum Required: 0 Maximum Available: 9

Nominee	Status	Cancel
Thomas Laux	Pending	Cancel

### 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

View

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

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:

- The actual feedback provided will be visible to the manager during the final review.
- 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.
- 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 sidebar titled 'Steps and Tasks' 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 green checkmark and a red rectangular box, with a 'View' link below it. The main content area is titled 'Manager Evaluation - Update and Share' and shows details for a 'WI Performance Review' for 'Kyle Beck'. It includes fields for 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), and Document ID (964). Below this, there is a section for 'Other Participants' listing 'Thomas Laux - CONTRACTORS'. At the bottom, there are buttons for 'Calculate All Ratings' and 'Cancel Evaluation', and a tabbed interface with 'WI Core Competencies' selected.

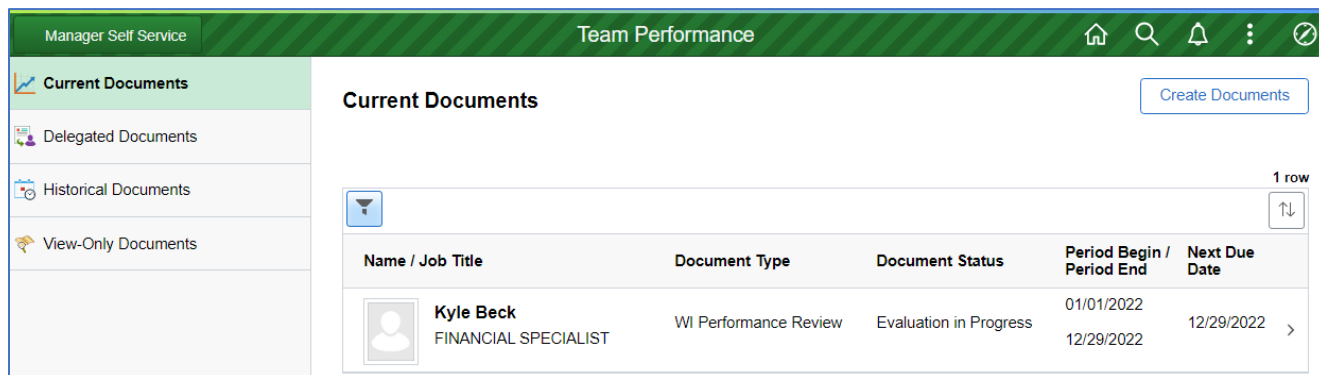
### Notes:

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.

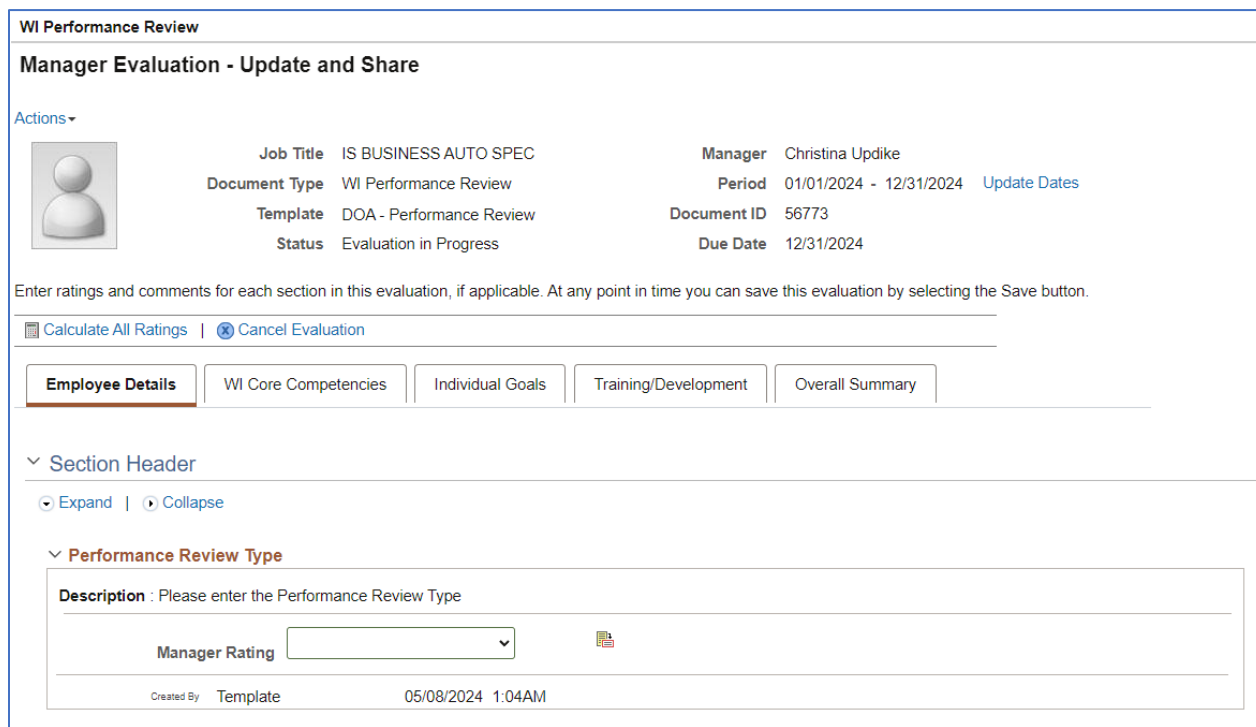
1. Once you are ready to complete a performance review, you can select from the list of **Current Documents** the **Team Performance** page. To open the performance review, click on the specific review in the list on the right side of the page.



The screenshot shows the 'Team Performance' page in the 'Manager Self Service' system. On the left, there is a sidebar with navigation options: 'Current Documents' (selected), 'Delegated Documents', 'Historical Documents', and 'View-Only Documents'. The main area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with one row of data. The table has columns for 'Name / Job Title', 'Document Type', 'Document Status', 'Period Begin / Period End', and 'Next Due Date'. The data row shows 'Kyle Beck' (FINANCIAL SPECIALIST) with a 'WI Performance Review' document, 'Evaluation in Progress' status, and a period from '01/01/2022' to '12/29/2022'.

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, you will be required to update the fields on the **Employee Details** tab. This includes selecting the Performance Review Type (probationary, annual, etc.), indicating your employee's Remote Worker Status (full time at headquarters, full time remote, or hybrid), and certifying that you have reviewed the Remote Work Agreement.




The screenshot shows the 'Manager Evaluation - Update and Share' page. At the top, it says 'WI Performance Review'. Below this, there is a section for 'Actions' with a dropdown arrow. To the left of the details is a placeholder for an employee photo. The details are organized into two columns. The left column contains: 'Job Title' (IS BUSINESS AUTO SPEC), 'Document Type' (WI Performance Review), 'Template' (DOA - Performance Review), and 'Status' (Evaluation in Progress). The right column contains: 'Manager' (Christina Updike), 'Period' (01/01/2024 - 12/31/2024) with a link to 'Update Dates', 'Document ID' (56773), and 'Due Date' (12/31/2024). Below the details, there is a text box with the instruction: '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 this text box are two buttons: 'Calculate All Ratings' and 'Cancel Evaluation'. At the bottom, there is a tabbed interface with five tabs: 'Employee Details' (selected), 'WI Core Competencies', 'Individual Goals', 'Training/Development', and 'Overall Summary'. Below the tabs, there is a 'Section Header' section with 'Expand' and 'Collapse' options. Underneath, there is a 'Performance Review Type' section with a 'Description' field containing the text 'Please enter the Performance Review Type'. Below the description is a 'Manager Rating' dropdown menu. At the very bottom, there is a footer area with 'Created By' (Template) and a timestamp (05/08/2024 1:04AM).

**WI Performance Review**

**Manager Evaluation - Update and Share**

Actions ▾



Job Title IS BUSINESS AUTO SPEC      Manager Christina Updike

Document Type WI Performance Review      Period 01/01/2024 - 12/31/2024 [Update Dates](#)

Template DOA - Performance Review      Document ID 56773

Status Evaluation in Progress      Due Date 12/31/2024

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](#)

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

Section Header

Expand | Collapse

Performance Review Type

Description : Please enter the Performance Review Type

Manager Rating

Created By Template      05/08/2024 1:04AM

Remote Worker

Expand
Collapse

Remote Worker Status

**Description :** At the time of this performance evaluation, indicate if the employee is working full-time at the designated headquarters (HQ) location or has an approved remote/hybrid work agreement.

☐ Full-time at designated HQ
☐ Full-time remote
☐ Hybrid

Manager Rating

Created By: Template
05/08/2024 1:04AM

Remote Worker Agreement

**Description :** I certify that I have reviewed the employee's remote work agreement within the past year and at this time the agreement is up to date.

☐ Not Applicable-Full Time at HQ
☐ Yes

Manager Rating

Created By: Template
05/08/2024 1:04AM

3. Then, move to the **WI Core Competencies** tab.

Performance Process

Performance Process
Steps and Tasks

WI Performance Review
01/01/2024 - 12/31/2024
Overview

- Goal Setting
Due Date: 12/31/2024
- Nominate Participants
Due Date: 12/01/2024
- Review Participant Evaluations
Due Date: 12/31/2024
- Complete Manager Evaluation
Due Date: 12/31/2024
- Update and Share

WI Performance Review
Manager Evaluation - Update and Share

Actions

Job Title: IS BUSINESS AUTO SPEC  
Document Type: WI Performance Review  
Template: DOA - Performance Review  
Status: Evaluation in Progress

Manager: Christina Updike  
Period: 01/01/2024 - 12/31/2024  
Document ID: 56773  
Due Date: 12/31/2024

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

Employee Details
**WI Core Competencies**
Individual Goals
Training/Development
Overall Summary

Wisconsin Core Competencies

4. 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.

5. 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.

6. 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:

7. 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.

Display Name	Role	Rating	Results
Thomas Laux	Direct Report	Not Applicable	I found Kyle to be a fair and supportive manager.

**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:

The screenshot displays the 'Performance Process' interface. On the left, a sidebar lists 'Steps and Tasks' for 'Kyle Beck', including 'Goal Setting', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main area is titled 'Manager Evaluation - Update and Share' for 'FINANCIAL SPECIALIST'. It shows document details like 'Document Type: WI Performance Review', 'Template: DOA - Performance Review', and 'Status: Evaluation in Progress'. A 'Save' button is visible in the top right, and a 'Share with Employee' button is highlighted with a red box. Below the document details, there's a section for 'Other Participants' and a confirmation message: 'You have successfully saved your evaluation.' At the bottom, there are tabs for 'WI Core Competencies', 'Individual Goals', 'Training/Development', and 'Overall Summary'.

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

The screenshot shows a 'Share with Employee' dialog box. It contains the text: 'Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.' Below this, it states: 'The overall rating you have assigned to this employee is **3 - Successful Performance**.' At the bottom, there are two buttons: 'Confirm' and 'Cancel'.

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 shows the 'Performance Process' interface. On the left, under 'Steps and Tasks', the 'Request Acknowledgement' step is highlighted with a red box. The main area displays 'Manager Evaluation - Request Acknowledgement' for Kyle Beck. It includes a table with details: Job Title (FINANCIAL SPECIALIST), Document Type (WI Performance Review), Manager (Timothy Le Fave), Period (01/01/2022 - 12/01/2022), Template (DOA - Performance Review), Document ID (968), and Status (Shared with Employee). Below this, there is a section for 'WI Core Competencies' with tabs for 'Individual Goals', 'Training/Development', and 'Overall Summary'. The 'Overall Summary' tab is selected, showing 'Section 1 - Wisconsin Core Competencies' with an 'Expand' button. A red box highlights the 'Request Acknowledgement' button in the bottom left corner of the main area.

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

The dialog box titled 'Request Acknowledgement' contains the text: 'Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.' Below the text are two buttons: 'Confirm' and 'Cancel'.

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 shows the 'Performance Process' interface. On the left, under 'Steps and Tasks', the 'Complete Manager Evaluation' step is selected, and the 'Pending Acknowledgement' link is highlighted with a red box. The main area displays the 'Manager Evaluation - Pending Acknowledgement' for Kyle Beck. It includes a profile picture, job title 'FINANCIAL SPECIALIST', document type 'WI Performance Review', template 'DOA - Performance Review', and status 'Pending Acknowledgement'. The manager is Timothy Le Fave, and the period is from 01/01/2022 to 12/01/2022. A red box highlights the 'Override Acknowledgement' button in the top right corner. Below the document details, there is a message: '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.' There are links for 'View Graphical Rating' and 'Reopen'. At the bottom, there are tabs for 'WI Core Competencies', 'Individual Goals', 'Training/Development', and 'Overall Summary'. The 'WI Core Competencies' tab is active, showing 'Section 1 - Wisconsin Core Competencies' with an 'Expand' button and a list item 'Accountability'.

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 screenshot shows a dialog box titled 'Override Employee Acknowledgement'. It 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 box 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.

**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
- 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
  - Update and Share

Request Acknowledgement  
Pending Acknowledgement

**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 - 12/31/2022  
Document ID 959  
Due Date 12/31/2022

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](#)


[Accountability](#)

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).

**Manager Self Service** **Team Performance**

**Cancel Documents**

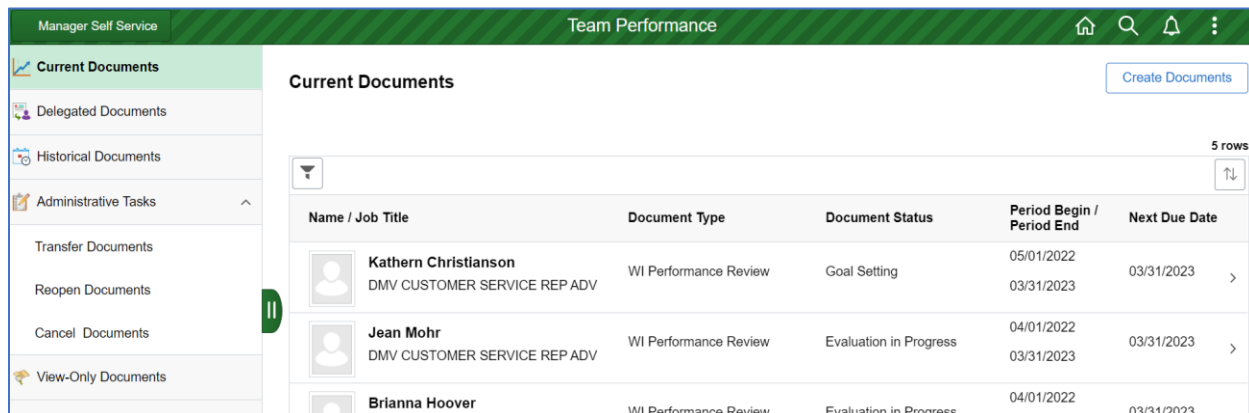
You have chosen to cancel the document(s) listed.  
To confirm this cancellation, select the Save button.

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

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

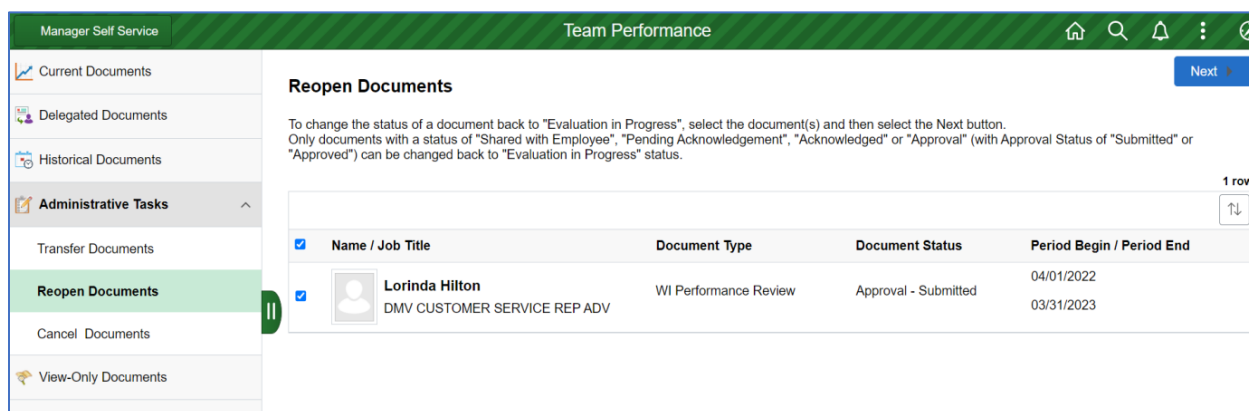
1. To reopen an evaluation, use the above initial instructions to navigate to the Performance Administration tile. There, click on **Administrative Tasks** on the left side of the screen, and when the options drop down, select **Reopen Documents**.



Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Kathern Christianson</b> DMV CUSTOMER SERVICE REP ADV	WI Performance Review	Goal Setting	05/01/2022 03/31/2023	03/31/2023
<b>Jean Mohr</b> DMV CUSTOMER SERVICE REP ADV	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023	03/31/2023
<b>Brianna Hoover</b>	WI Performance Review	Evaluation in Progress	04/01/2022	03/31/2023

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.









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


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.

1 row

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

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**.

The screenshot shows the 'Manager Self Service' interface with the 'Team Performance' header. On the left sidebar, 'Administrative Tasks' is expanded, and 'Transfer Documents' is selected. The main area displays a table titled 'Current Documents' with a 'Create Documents' button in the top right. The table has columns for Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. It lists three documents for 'DMV CUSTOMER SERVICE REP ADV'.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Kathern Christianson	WI Performance Review	Goal Setting	05/01/2022 03/31/2023	03/31/2023
Jean Mohr	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023	03/31/2023
Brianna Hoover	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023	03/31/2023

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.

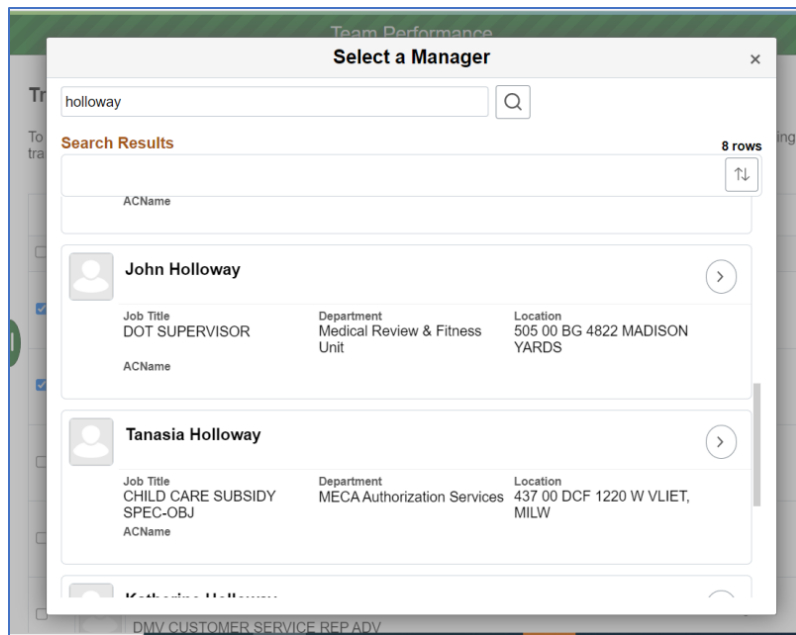
The screenshot shows the 'Transfer Documents' page. The left sidebar is the same, but 'Transfer Documents' is now highlighted. The main area has a title 'Transfer Documents' and a 'Next' button. Below the title is a brief instruction: 'To transfer a document to a different manager, select the document(s), then select the Next button to choose the receiving manager. Only current documents can be transferred.' A table lists the same three documents as the previous screenshot, but with checkboxes in the first column. The checkboxes for 'Anne Donaldson' and 'Brianna Hoover' are checked, while the checkbox for 'Jean Mohr' is not.

<input type="checkbox"/>	Name / Job Title	Document Type	Document Status	Period Begin / Period End
<input checked="" type="checkbox"/>	Anne Donaldson	WI Performance Review	Approval - Not Submit	03/01/2022 03/31/2023
<input checked="" type="checkbox"/>	Brianna Hoover	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023
<input type="checkbox"/>	Jean Mohr	WI Performance Review	Evaluation in Progress	04/01/2022 03/31/2023

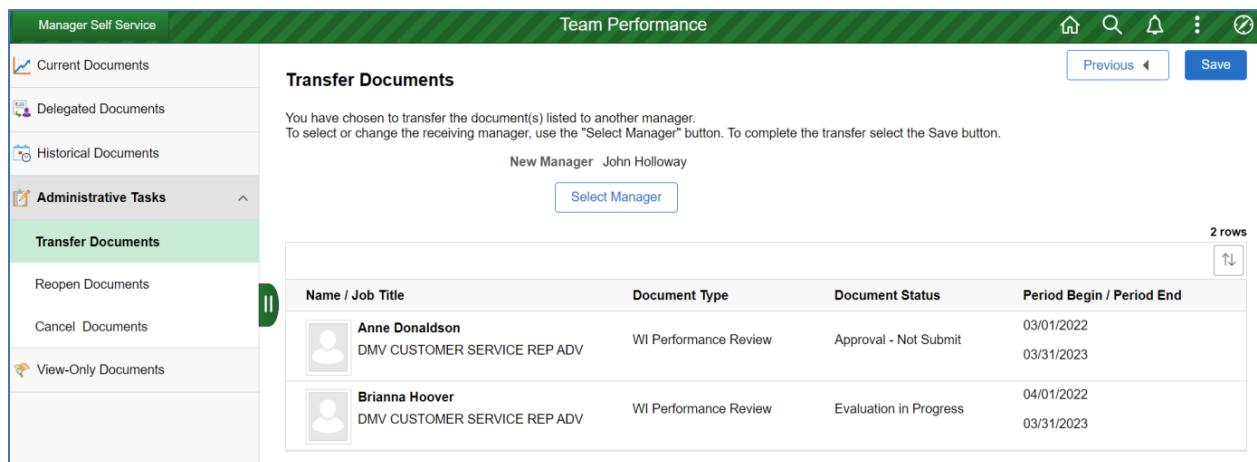
3. A Select a Manager box will pop up on the screen. There, type in the name of the manager you wish to transfer the document(s) to and click the search icon.

The screenshot shows a 'Select a Manager' dialog box. It has a search input field with the text 'holoway' and a search icon to its right. The dialog box is titled 'Select a Manager' and has a close button in the top right corner.

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.

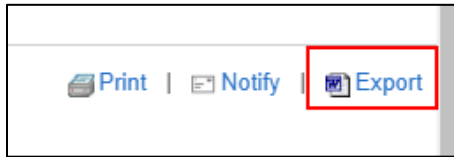


5. A confirmation message will briefly appear at the top of the page and then disappear. The transferred document(s) will no longer be viewable in your current documents list. The manager who is receiving the transferred document will get an email letting them know that a document has been transferred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

