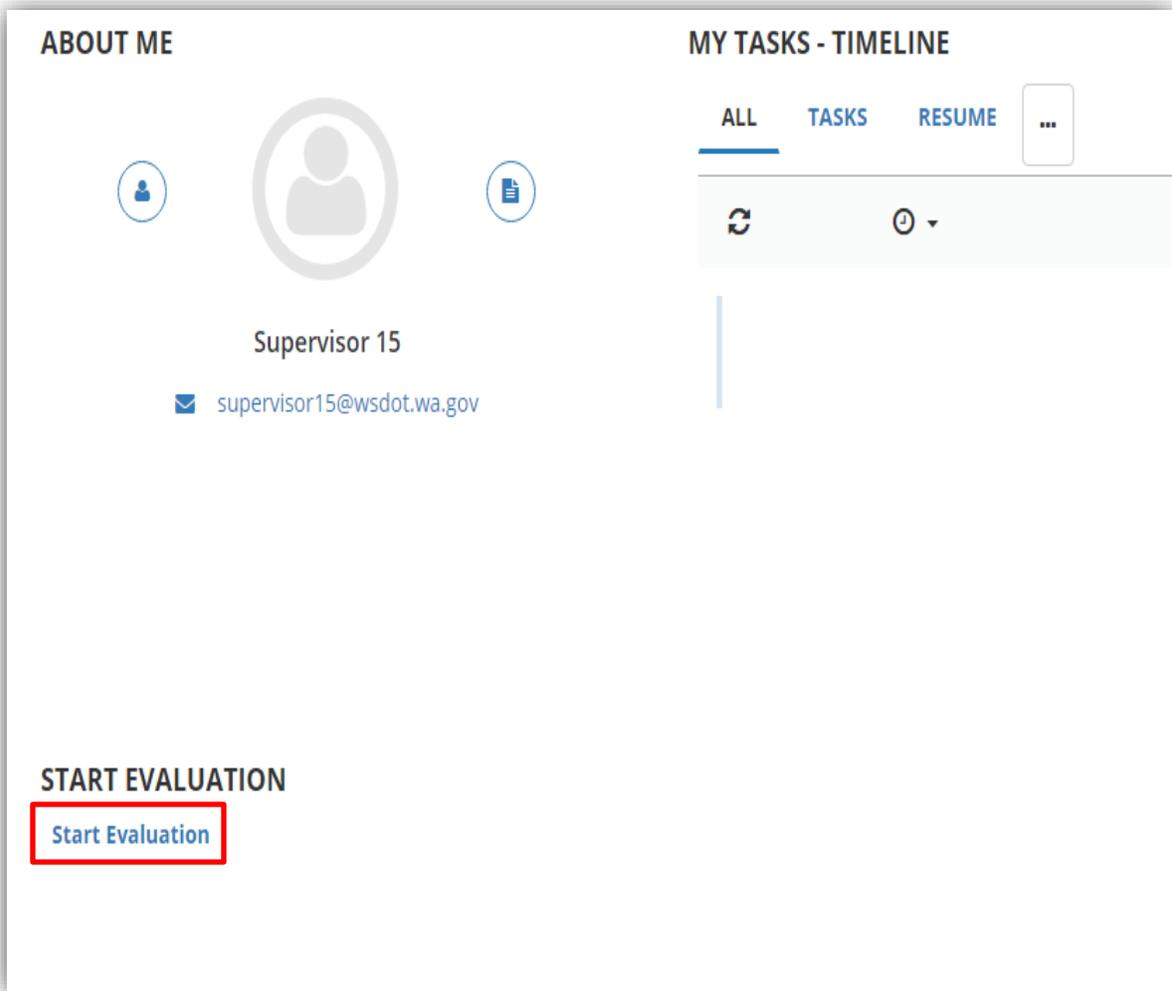# Evaluator Instructions

Creating Performance Evaluation

1. From your personal profile homepage, click on Start Evaluation.

2. On the OVERVIEW page, select **ASSIGN TASK.**

OVERVIEW

🗟 TASK MANAGEMENT

Task management covers all of the functions that are needed to maintain tasks that are assigned to users. Most of the functions affect individual employees; larger functions are handled with batch processes.

· **ASSIGN TASK**

Assign task is used to assign tasks to individual users, optionally with a specific start and end date. To assign tasks to more than one user at a time, use a Stage Task type batch process. View Help: Administration > Tasks > Assign Task

3. The next screen called **ASSIGN TASK WIZARD** is where you will select the task type that you would like to assign to an employee. The system will default to the current years 12 Month process. If you are starting a 6 month evaluation please use the drop down to choose the 6 month process. Once you choose the correct process select **NEXT.** Note: You will choose the year that you are starting the evaluation. Example: Start date 10/1/2018 use 2018 process, 1/1/19 use 2019 process.

ASSIGN TASK WIZARD

⊙ Next   **2**

SELECT TASK

Select the task type that you would like to assign to an employee.

Type

2018 WSDOT Employee Performance Evaluation Process - 12 Months ▾

| 2018 WSDOT Employee Performance Evaluation Process - 12 Months | **1** |
| 2018 WSDOT Employee Performance Evaluation Process - 6 Months |
| 2017 WSDOT Employee Performance Evaluation Process |
| FY2016 WSDOT Employee Performance Evaluation Process |

4. On the following screen, click on the **Search** button to find an employee.

ASSIGN TASK WIZARD

☑ Finish

SELECT EMPLOYEE

Select the employee to whom you would like to assign the **FY2**

Name

[   ] CLEAR **SEARCH**

Select the start dates and end dates for the chosen task.

Start Date [   ] [<] [>] [...]

End Date [   ] [<] [>] [...]

5. Click on **My Team**. Select the employee to whom you would like to assign the Employee Performance Evaluation Process task.

SELECT EMPLOYEE TO VIEW ✕

1

Myself   My Team   Recent   [   ] 🔍 ✖   ❓

Last Name	First Name	Employee	Email
03	Employee	206269	employee03@wsdot.wa.gov

2

6. Select the **Start Dates** and **End Dates** (Note: The [...] button will bring up a calendar) for the Performance Evaluation and click on the **Finish** button. (Make sure the appropriate expanse of time is selected (year, 6 months, etc.)) <mark>Note: If you choose a date set in the future, the system will not allow you to move to the next step in the process until that date.</mark>
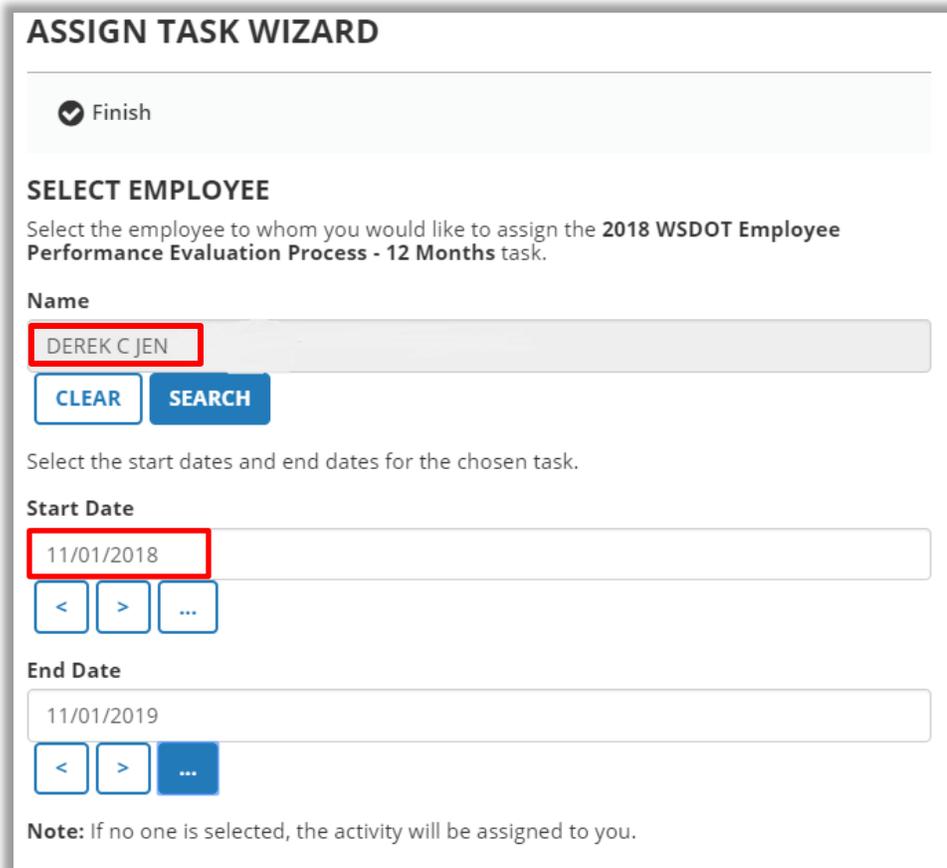
ASSIGN TASK WIZARD

✓ Finish

SELECT EMPLOYEE

Select the employee to whom you would like to assign the **2018 WSDOT Employee Performance Evaluation Process - 12 Months** task.
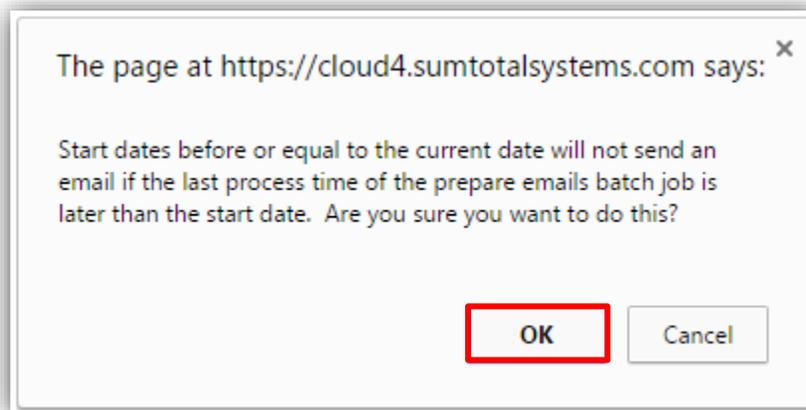
Name

DEREK C JEN

CLEAR   SEARCH

Select the start dates and end dates for the chosen task.

Start Date

11/01/2018

[<] [>] [...]

End Date

11/01/2019

[<] [>] [...]

Note: If no one is selected, the activity will be assigned to you.

7. If you choose today as your start date you will get the following dialog box. You will not receive a notification saying you are starting the evaluation today, click **OK** button.

The page at https://cloud4.sumtotalsystems.com says: ✕

Start dates before or equal to the current date will not send an email if the last process time of the prepare emails batch job is later than the start date. Are you sure you want to do this?

OK   Cancel

8. The Evaluator selects the Evaluation Type* from the drop-down menu, Annual is defaulted. Make sure you are selecting the appropriate Evaluation Type for the review period (probationary, trial service, etc.). You will need to re-enter the same dates you choose at the beginning of the process to

9. **Core Competencies** will already have Safety Awareness and Values Diversity established. The next step will be to add specific position competencies.
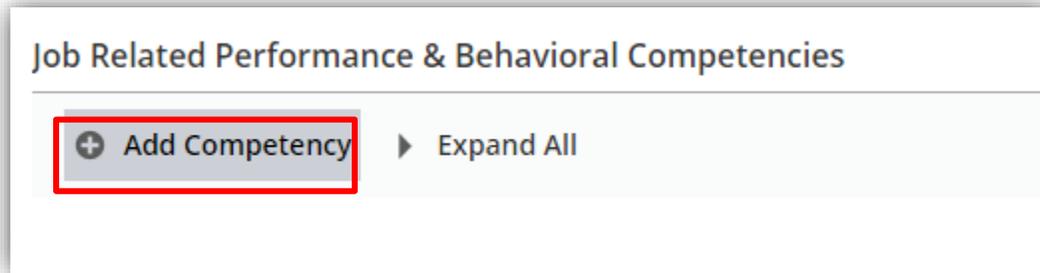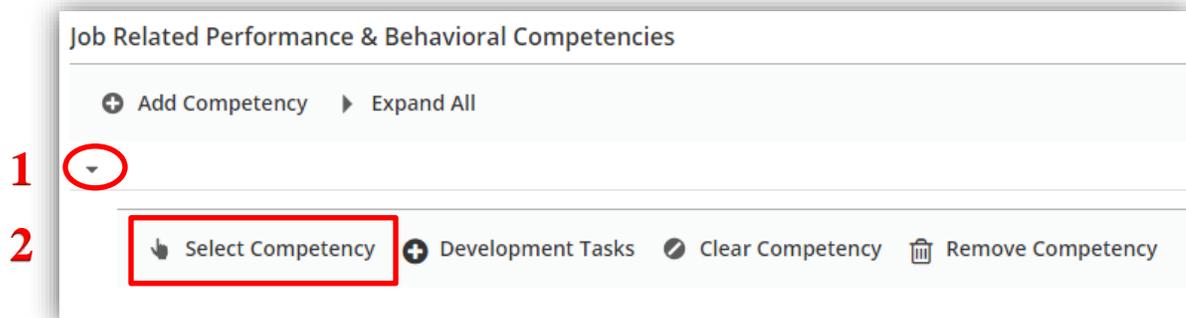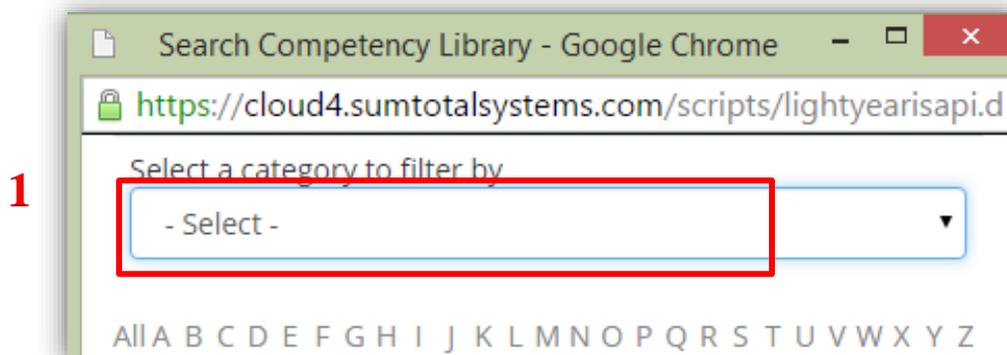
10. Under **Job Related Performance & Behavior Competencies**, click on **Add Competency** to begin a new competency.
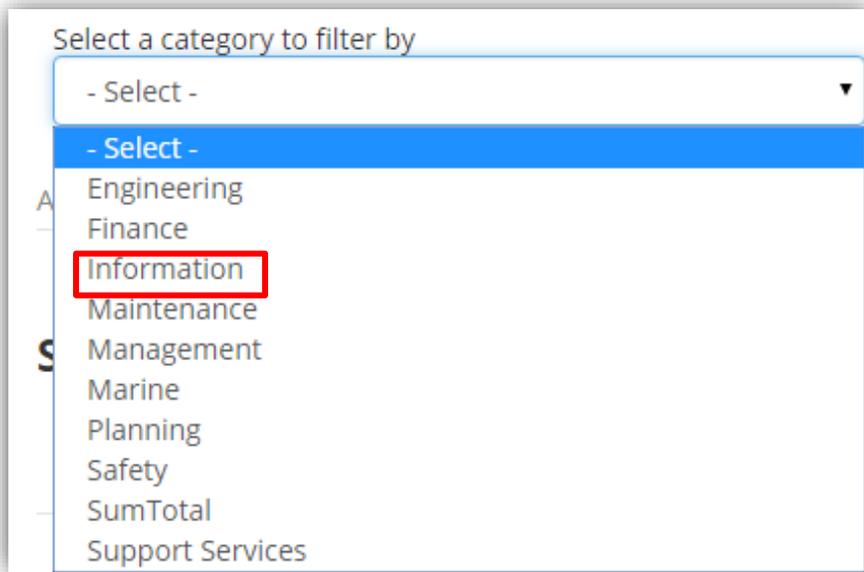

11. A new blank line is inserted and no choices will be present. You need to click the **right pointing arrow** once and the menu of competency choices will appear below this new competency. Click on Select **Competency** button.

12. At the top of the next window, you may select a category in the pull-down menu at the top of the screen. This may help populate specific competencies that may apply to the position. (Example below is for a technology position so selection was **Information**.) Otherwise, you may filter by the alphabet to find specific competencies.

This may help populate specific competencies that may apply to the position. (Example below is for a technology position so selection was **Information**.) Otherwise, you may filter by the alphabet to find specific competencies

Select a category to filter by

- Select -

- Select -
Engineering
Finance
Information
Maintenance
Management
Marine
Planning
Safety
SumTotal
Support Services

13. The results will be listed over several screens. As you scroll through each page, you will need to click **Next** at the bottom of the screen(s) to move through all choices. The competency clicked on for this example is **Information: Customer Focus**.

Information: Creativity and Innovation	Information
Information: Customer Focus	Information
Information: Decisiveness	Information
Information: Delegates-Shares Responsibility	Information

14. Repeat steps 10-20 to select all additional Competencies you will want to measure. The agency standard is 4-6 Competencies total. For **EXAMPLE ONLY**, the below screen captures show an evaluation screen with competencies all collapsed.

15. The next section of the evaluation is for the Position Description review. This is a point in the process that you are expected to go over the employees Position Description with them. Once complete, click the box to confirm you've done this step.

16. The next section is for the Ethics Review confirmation. This is the point in the process that you are expected to go over the Ethics Law with the employee and choose the appropriate answer. If you answer yes to question outside business interest please answer the last question.

Ethics Review

WSDOT requires that annually, the Evaluator and the Employee review the employee's job duties as they relate to the Ethics Law (RCW 42.52, Ethics in Public Service) and document the results of that review. A separate form is no longer required for this, but you must have a discussion with the employee and check the appropriate statement(s) below.

Limitations on Gifts

Is the employee in a Section Four Relationship, as defined by the State Ethics Law, by virtue of the employee's job or position? *

- Select - ▼

Outside Business Interests

Does the employee have business interests (either another job or ownership in a company) outside WSDOT? *

- Select - ▼

If employee has outside business interests, was the nature of the outside business interest discussed and determined to NOT BE in conflict with the Employee's official duties at WSDOT.

(No Answer) ▼

17. Once satisfied, near the top of the evaluation, hit the **Save** button and then the **Submit** button.

OVERVIEW SECTION

The WSDOT Performance Management Program is a ten step process that replaces the existing EDPP/MDPP process. It is designed to foster a positive, performance-based culture that supports employee competence, productivity, achievement of organizational goals and objectives, and the documentation of an employee's strengths and areas in need of improvement.

Create Evaluation	Monitor Performance	Review Evaluation	**Complete Evaluation**
Evaluator Completes and Sig...	HR Reviews and Signs Evaluation		

Evaluator Completes and Signs Evaluation

The Evaluator checks that all comments and signatures have been collected, and signs the Evaluation, declaring it complete.

Evaluation Type
Annual

💾 Save ⊙ Submit 🖶 Print Preview 🖉 Notes 🕘 View History 🔲 Go To ✓ Spell/Legal Check

18. Confirm you are ready for the evaluation to move to the next step in the process by clicking yes. Once clicked the evaluation has been submitted to the employee's profile for their acknowledgement.

Confirm

Are you sure you want to submit?

NO | YES