Evaluator Instructions

Creating Performance Evaluation

1. From your personal profile homepage, click on Start Evaluation.
2. On the OVERVIEW page, select **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 year's 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.
4. On the following screen, click on the Search button to find an employee.

![Assign Task Wizard]

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]
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.)) **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.

![ASSIGN TASK WIZARD](image)

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:](image)
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

![EVALUATION INFORMATION](image)

9. **Core Competencies** will already have Safety Awareness and Values Diversity established. The next step will be to add specific position competencies.

![Core Competencies](image)
10. Under **Job Related Performance & Behavior Competencies**, click on **Add Competency** to begin a new competency.

![Image of Add Competency button]

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.

![Image of competency selection]

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.

![Image of category selection]

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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**.
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.
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