
PMDP

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM

School of Education

Supervisor & Employee Training



Talent Recruitment and Engagement

OFFICE OF HUMAN RESOURCES
UNIVERSITY OF WISCONSIN-MADISON

*SUPERVISOR & EMPLOYEE
Version 2.1 | Updated July 2018*

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PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM (PMDP)

PMDP is a new software program available to campus to streamline and track the activities and conversations required by UW–Madison’s [performance management policy](#). The Performance Management and Development Program (PMDP) will provide UW–Madison with a centralized system for tracking and documenting these actions, providing the campus with greater consistency in how performance management is recorded.

SUPERVISOR & EMPLOYEE TRAINING

This module is geared toward learning the performance management functions for supervisors and employees within PMDP.

PURPOSE

The purpose of this module is to introduce you to the PMDP environment and the procedures for capturing, documenting and tracking performance management activities in compliance with the performance management policy. Employee / Supervisor responsibilities within the performance management policy include:

Supervisor:

- Completes all elements of the performance management program in compliance with the policy and any applicable division policies/processes in a timely manner
- Conducts frequent meaningful conversations with employees on their performance, goals, and growth
- Seeks assistance from division/department HR when necessary

Employee:

- Understands the performance management program and process
- Fully participates in the performance management program in a timely and constructive manner

LEARNING OUTCOMES

At the end of this module, you will be able to:

- Identify where to access PMDP
- Define the differences in user access and permission structure
- View how to navigate the dashboard and menu structure within PMDP
- Work through performance activities from start to finish using the participant guide and other resources



What are your expectations for this class?

SYSTEM ACCESS

PMDP is accessed at pmdp.hr.wisc.edu or through MyUW portal. The system will be available for your Division use on July 13, 2018. The system requires single sign on with your UW-Madison NetID and password.

Go to pmdp.hr.wisc.edu and you will be directed log in with your NetID and password



Login

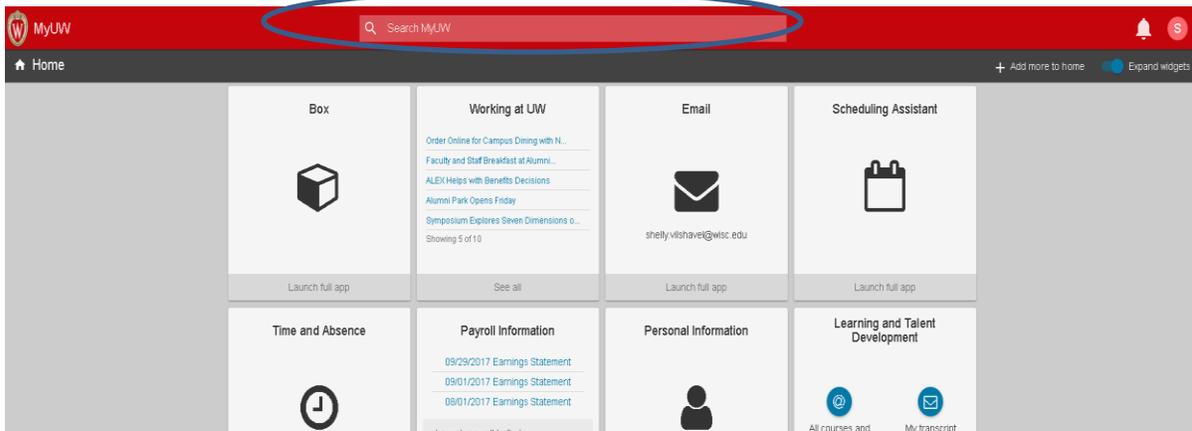
NetID [Forgot NetID](#)

Password [Forgot password](#)

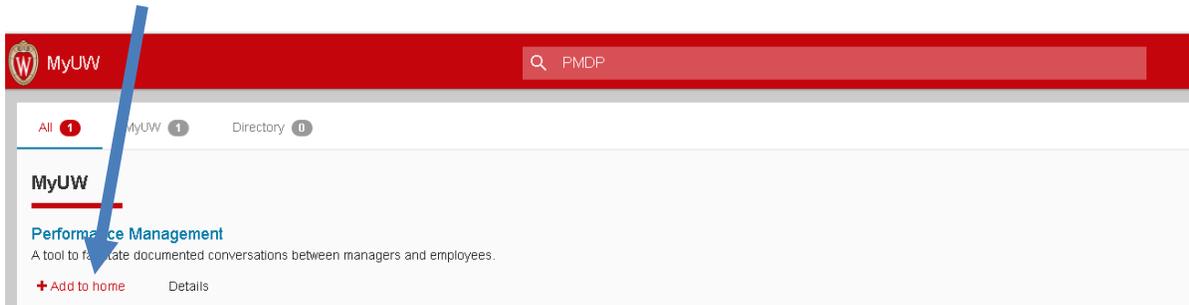
Login

OR add PMDP to your MyUW portal home page.

Go to MyUW Home and type **PMDP** in the search box



Click **+Add to home** to add PMDP as a widget on your home page



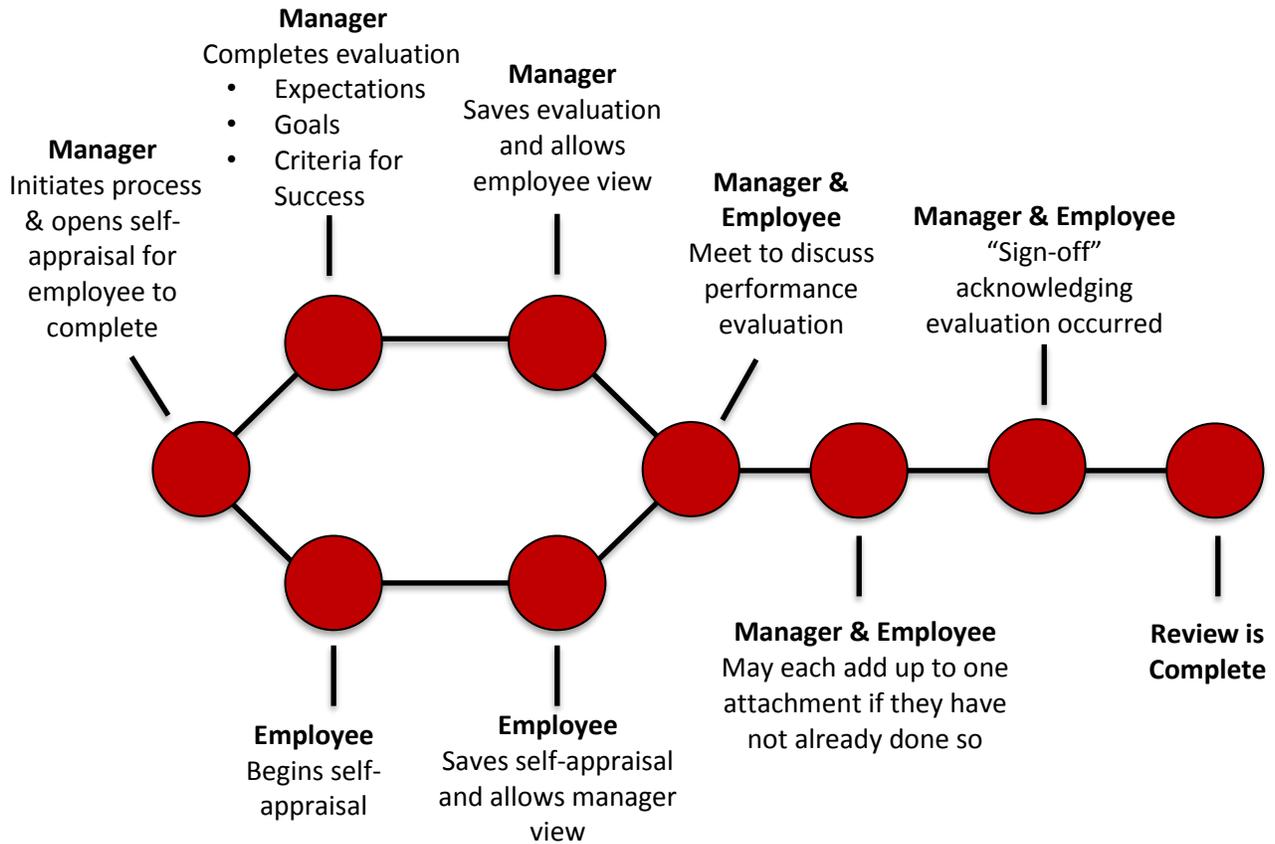
PERMISSION GROUPS

Currently, six distinct permission groups are assigned in PMDP. A combination of the permission group, the team to which you belong (based on UDDS), and the role you play determine the actions that are available to you. The primary roles/permission groups involved in the administration include “Division HR” and “Department HR”. The six permission groups include:

Permission Group	Description
Employee	Access to the employee’s performance activities only. Additionally, all performance activities completed for the employee within PMDP will be available to the employee within PMDP on demand (24/7) through the website and MyUW portal.
Supervisor	Has access to performance activities for only those employees they supervise (direct reports). Additionally, will have access to their own employee performance activity (same as employee description).
Indirect Supervisor	Has viewing access only to evaluations and status of evaluations for the UDDS(s) assigned. This group will not receive email messages about status updates and does not have ability to perform administrative tasks such as move, re-open, close or acknowledge evaluations.
Department HR	Has access to view and maintain HR performance activity functions for the employees/supervisors within the departments that they are administrators of. Will also have access to the supervisor function if they have direct reports (same as supervisor description). Additionally, will have access to their own employee performance activity (same as employee description).
Division HR	Has all the capabilities of Department HR, as well as access to view and maintain HR performance activity functions for the entire division. Will also have access to the supervisor function if they have direct reports (same as supervisor description). Additionally, will have access to their own employee performance activity (same as employee description).
SuperUser / Administrator	Central OHR TRE staff are the only users in this permission group. This allows full access to configure and troubleshoot the system.



PMDP PROCESS



EVALUATION CYCLES

Summary Evaluation Period (Annual) _____

Midpoint Conversation Period _____



.....

.....

.....

PMDP DASHBOARD VIEWS

SUPERVISOR



PMDP Dashboard

Performance Management

Performance evaluation information for employees assigned to supervisor.

Search:

Name	EmpID	Previous Evaluation		Current Evaluation		
		Type	Date Completed	Type	Date Started	Status
CATANIA, STEVEN	00855281	Summary Evaluation	7/22/2017			Start Evaluation
KLETT, JACOB WARREN	00876961			Thirty Day Conversation	7/24/2017	Continue Evaluation
KOVALASKE, JULIE A	00450833			Midpoint Conversation	7/24/2017	Continue Evaluation
SEYMOUR, TORI	00876364			Summary Probation Evaluation	7/24/2017	Continue Evaluation

Supervisors will have a dashboard under the HOME menu option which displays performance activities completed and in progress for their direct reports. They can view previous evaluation activity of which they have completed as well as current evaluation activity they have started.

The four tabs on the Top Menu Bar are

- Home – Dashboard View
- My Performance – Employees own performance activity and history
- Manage – Ability to search by each direct report
- Help – Link to Help tools and documents



PMDP DASHBOARD VIEWS

EMPLOYEE



Performance Evaluation History

EmpID 00795341

Name VILS HAVEL, MICHELLE

Evaluations	Evaluation Type	Status	Overall Rating	Evaluation Period Start Date	Evaluation Period End Date
Edit	Summary Evaluation	Waiting on Supervisor		12/16/2015	7/13/2017

Employees (who are not also supervisors) will have only the Home and Help menu options where they can view any evaluation activity completed for themselves that was created within PMDP and help tools and documents.

The two tabs on the Top Menu Bar are

- Home – Employees own performance activity and history
- Help – Link to Help tools and documents



BEGINNING AN EVALUATION -SUPERVISOR

The Supervisor will begin a performance evaluation by selecting the employee they wish to evaluate. This can be done several ways:

On the Performance Management Tab (HOME on Top Menu Bar) find the employee. You can click on the EmpIID or on the Start Evaluation link under Status

PMDP Dashboard

Performance Management

Performance evaluation information for employees assigned to supervisor.

Search:

Name	EmpIID	Previous Evaluation		Current Evaluation		
		Type	Date Completed	Type	Date Started	Status
BACULIK, SUSAN C	00392833					Start Evaluation
BOWERS, LAUREN M	00444415			Summary Evaluation	7/19/2017	Continue Evaluation

You can also find the employee by clicking on MANAGE on the Top Menu Bar and search by your direct reports.

Employee

Employee []

EmpIID []

Name []

Nickname []

Position Number ...

Start Date

Probation End Date

Once Employee is selected you will see any performance evaluation history and if there is no previous click on "Create New"

Performance Evaluation History

EmpIID 00446486

Name FINI-MARTEN, ERICA C

Evaluations

BEGINNING AN EVALUATION -SUPERVISOR

There are five performance activities to choose from:



- Thirty Day Conversation
- Mid Probation Conversation
- Summary Probation Evaluation
- Midpoint Conversation
- Summary Evaluation

Chose the performance activity you wish to create and click “Create”

A dialog box titled "Create Performance Record" with a close button (X) in the top right corner. It contains a dropdown menu for "Evaluation Type" with "Summary Evaluation" selected. At the bottom right, there is a red "Create" button. A blue arrow points from the right side of the dialog box towards the "Create" button.

Input the “Evaluation Period Start and End Date” and click Save & Next

A screenshot of a web form with a navigation bar at the top containing tabs: "General" (highlighted in red), "Expectations", "Criteria for Success", "Goals", "Attachments", "Overall Rating", and "Status". Below the navigation bar, there is a thank you message and instructions. The main form area contains the following fields:

- Supervisor: Amy Hawley
- Evaluation Type *: Summary Evaluation (dropdown menu)
- Evaluation Period Start Date *: 07/01/2017
- Evaluation Period End Date *: 06/30/2018

A blue oval highlights the "Evaluation Type", "Evaluation Period Start Date", and "Evaluation Period End Date" fields. At the bottom right, there are two red buttons: "Save" and "Save & Next". A red arrow points from the right side of the page towards the "Save & Next" button.

BEGIN EVALUATION - EMPLOYEE

Once your supervisor begins the evaluation activity you will receive an email notification. If the evaluation type is a Summary or Summary Probation Evaluation, you will be asked to complete your Self -Appraisal portion. **(NOTE: Thirty Day, Mid Probation and Midpoint Conversation evaluations do not have a self-appraisal portion)**

Performance Evaluation [Back to Performance List](#)

Employee EmpID	00530533
Employee Name	GOMEZ RENDON, SARAH
Employee Unit	EDUC/GEN ADMIN/DEAN'S OFFICE - HR ASST ADV
Evaluation Type	Summary Evaluation (7/1/2017 - 6/30/2018)
Evaluation Status	Waiting on Supervisor Allow Supervisor View

Employee Self-Appraisal Attachments Status

Employee Status NOT Complete

Self-Appraisal is an opportunity for the employee to highlight key accomplishments during the evaluation period and areas for development. Responses will be visible to the supervisor once the employee allows. Employee may modify content until the evaluation is finalized. [Save](#)

Question	Answer
Summarize your progress on current evaluation period goals including significant achievements and successful efforts.	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p style="text-align: right;">4000 characters remaining</p>
List the goals you would like to work on for the next evaluation period including career development goals.	

You can copy and paste information into the answer field from other documents. Note the characters remaining field and ensure you do not exceed the character limit. If you do, the document will not save, and you will receive an error message. All employees are encouraged to complete the Self-Appraisal question/answer section.



BEGIN EVALUATION - EMPLOYEE

Once you have completed your self-appraisal portion you can also attach documents on the Attachments Tab. Click on Save or Save & Next

Performance Evaluation Back to Performance List

Employee EmpID	00584522
Employee Name	ARNOLD, ALISHA A
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Supervisor Allow Supervisor View

Employee Self-Appraisal **Attachments** Status

The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachment examples: letter of commendation, certificate of training, resume, customer feedback. Attachment file size may not exceed 2MB.

Human resources can attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

The uploaded file must not exceed 2MB in size.

Attachment Browse...

HR Attachment No attachment.

Save Save & Next

When you are finished with the self-appraisal and are ready to allow your supervisor to view click Allow Supervisor View

Performance Evaluation

Employee EmpID	00584522
Employee Name	ARNOLD, ALISHA A
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Supervisor Allow Supervisor View

Are you sure? ×

By clicking this button, all of your responses will be visible by your supervisor.

Yes No

COMPLETING EVALUATION -SUPERVISOR

You can begin working on the supervisor portion of the evaluation at the same time the employee is completing the self-appraisal. Once the employee has completed their self-appraisal and allowed supervisor view, you will receive an email notification. You can then view the employee's responses as well as any attachments they have uploaded.

Begin working your way through each of the tabs and clicking "Save & Next" as you go from one tab to another.



Note: Do not click "Allow Employee" to view until you are completed with at least the Expectations, Criteria for Success and Goals sections.

A screenshot of the "Performance Evaluation" form. At the top right is a link "Back to Performance List". Below it is a grey box containing employee information: "Employee EmpID: 00584522", "Employee Name: ARNOLD, ALISHA A", "Evaluation Type: Summary Evaluation", and "Evaluation Status: Waiting on Supervisor". A red arrow points from the note above to a yellow "Allow Employee View" button. Below this is a navigation bar with tabs: "General" (highlighted), "Expectations", "Criteria for Success", "Goals", "Employee Self-Appraisal", "Attachments", "Overall Rating", and "Status". The main content area contains a thank-you message and instructions. Below that are fields for "Supervisor" (Diana M Allaby), "Evaluation Type" (Summary Evaluation), "Evaluation Period Start Date" (11/01/2015), and "Evaluation Period End Date" (07/24/2017). At the bottom right are "Save" and "Save & Next" buttons.

COMPLETING EVALUATION -SUPERVISOR: EXPECTATIONS

The Job Function, Expectations and Rating must be filled in on all evaluation types except for Thirty Day Conversation as that Rating would not be applicable and is unable to be filled in. The Rating Explanation gives you the opportunity to comment on employee’s performance within that area.

General **Expectations** Criteria for Success Goals Employee Self-Appraisal Attachments Overall Rating Status

These are the key job functions and expectations for this evaluation period. Rating scale: Exemplary, Successful, Developing, Partially Meeting Expectations, Not Meeting Expectations, Unable to Rate/Not Rated.

*Job Function ?	*Expectations ?	*Rating	Rating Explanation
Note: 512 character limit Example: Conduct Payroll with minimal errors.	Note: 512 character limit Example: Meet payroll calc. deadlines.		Note: 1024 character limit

Add Row

Save Save & Next

Click Add Row to begin inputting the Job Function and Expectations. The Job Functions are the critical components of the employee’s role and may change over time. You must add at least one Job Function. All Job functions entered will carry through to each subsequent evaluation. A best practice is to take the key areas of the PD or PVL. (Sample Job Functions and Expectations on page 14 and 15)

Rating Options are as follows: (See Rating Explanation Guide page 16)

- Exemplary
- Successful
- Developing
- Partially Meeting Expectations
- Not Meeting Expectations
- Unable to Rate/Not Rated



COMPLETING EVALUATION -SUPERVISOR: EXPECTATIONS

Sample Job Function and Expectations:

Job Function: <i>Basic duties for which an employee is responsible. These duties may vary from one position to the next, even within the same pool of employees.</i>	Expectations: <i>Clear and concise performance objectives to complete the overall job function.</i>
<p>Administrative Tasks</p> <p>Participate on teams, serve as a resource person using software tools to enhance the effectiveness of committees and teams</p> <p>Plan and organize departmental and/or vision related special events</p>	<ul style="list-style-type: none"> ● Engaged and effective team member who makes a strong contribution ● Well-planned events ● Calendaring-Scheduling (timely, and accurately) ● Planning Events in a timely manner. ● Preparing for meetings ● Preparing reports ● Participating in projects
<p>Research</p> <p>Perform data linkages and play a key role in conducting analysis on multiple large-related databases</p> <p>Communicate analysis and evaluation of data to public, internal/external staff and partners, and other agencies</p> <p>Participate as a data expert on ...</p>	<ul style="list-style-type: none"> ● Following protocols ● Analyzing data ● Documentation of research ● Grant writing ● Developing research ideas ● Accurate, timely and relevant analysis ● Communications that are clear, accurate and appropriate to the audiences ● Maintain and share high degree of expertise
<p>Grants Administration</p>	<ul style="list-style-type: none"> ● Identifying grant opportunities ● Editing and reviewing grant proposals ● Working with PI to meet deadlines ● Completing post-award duties
<p>Outreach</p> <p>Serve as a primary outreach contact for the University of Wisconsin</p> <p>Plan and organize training and public policy program admission and recruiting efforts</p> <p>Plan and organize program-wide activities</p> <p>Maintain training program courses</p>	<ul style="list-style-type: none"> ● Developing and maintaining relationships ● Developing informational materials ● Sustaining up-to-date knowledge & skills ● Communicating effectively with community partners ● Managing events ● Well-attended, successful outreach events with positive feedback from audiences ● Well-organized and attended events ● Course content is up to date and relevant to the audiences

COMPLETING EVALUATION -SUPERVISOR: EXPECTATIONS

Sample Job Function and Expectations Continued:

Job Function: <i>Basic duties for which an employee is responsible. These duties may vary from one position to the next, even within the same pool of employees.</i>	Expectations: <i>Clear and concise performance objectives to complete the overall job function.</i>
Management/Supervisor Oversee the recruiting, staffing, classification, and employment life cycle processes for all employee categories Monitor compliance with performance management deadlines and milestones; assist employees	<ul style="list-style-type: none">• Setting Vision and Goals• Monitor progress against goals on an ongoing basis, ensuring that course corrections are made as needed.• Consistency in communication with your staff and supervisor.• Ensure that quality service is provided in a timely manner

(NOTE: A best practice is to take the job functions from the Job Description, PD, PVL. Focus on key functions that are essential to the role.)



What questions do you have about the Expectations Tab?

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM RATING SCALE GUIDE

The Performance Management & Development Program (PMDP) rating scale guide is focused on providing clear levels of performance standards. The rating scale is meant as a best practice tool to aid managers and supervisors with the evaluation of employees. The definitions/examples contain language and common terminology that can be applied to measure the level of each employee's performance.

Encouraging professional growth as well as developing healthy, inclusive and engaging employee/manager/supervisor relationships through effective performance activities is an essential component of a Performance Management & Development program.

PERFORMANCE RATINGS

EXEMPLARY	<ul style="list-style-type: none"> • Performance consistently exceeded the communicated expectations in all essential areas of responsibility, job function or goals • Overall quality of work was excellent • Employee made an exceptional or unique contribution in support of school, college, division or University objectives • Employee demonstrated a very high degree of expertise and serves as a model of excellence or coach to other employees
SUCCESSFUL	<ul style="list-style-type: none"> • Performance consistently met the communicated expectations in all essential areas of responsibility, job function or goals • May occasionally exceed requirements • This rating conveys solid, effective performance
DEVELOPING	<ul style="list-style-type: none"> • Performance met the communicated expectations in most areas of responsibility, job function or goals • Employee is progressing and on track to achieve expectations, job functions or goals
PARTIALLY MEETING	<ul style="list-style-type: none"> • Performance did not consistently meet communicated expectations in one or more areas of responsibility, job function or goals • A professional development plan to improve performance may be recommended
NOT MEETING	<ul style="list-style-type: none"> • Performance was consistently below expectations in most areas of responsibility, job function and goals and/or reasonable progress was not made • Significant improvement is needed in one or more important area • A professional development plan to correct performance, including timelines, should be outlined and monitored to measure progress
UNABLE TO RATE / NOT RATED	<ul style="list-style-type: none"> • Not rated – not using • Criteria not being measured – comments only • Not applicable to employee's role • Not yet trained – unable to rate

COMPLETING EVALUATION -SUPERVISOR: CRITERIA FOR SUCCESS

Criteria for Success reflect key skills and values that employees are expected to demonstrate. If some criteria do not apply you can choose “Not Rated/Unable to Rate”. (Refer to Rating Scale Guide on Page 17.) Only Summary and Summary Probation evaluation types will have the Criteria for Success tab.

Performance Evaluation

[Back to Performance List](#)

Employee EmpID 00530533
Employee Name GOMEZ RENDON, SARAH
Employee Unit EDUC/GEN ADMIN/DEAN'S OFFICE - HR ASST ADV
Evaluation Type Summary Evaluation (7/1/2017 - 6/30/2018)
Evaluation Status Waiting on Supervisor

[Allow Employee View](#)

[General](#) [Expectations](#) **[Criteria for Success](#)** [Goals](#) [Attachments](#) [Overall Rating](#) [Status](#)

Criteria for Success reflect key skills and values that unit employees are expected to demonstrate. Rating scale: Exemplary, Successful, Developing, Partially Meeting Expectations, Not Meeting Expectations, Unable to Rate/Not Rated.

[Save](#) [Save & Next](#)

Performance Criteria	* Rating <small>[Definitions]</small>	Rating Explanation
Commitment to the mission of the University and work unit <ul style="list-style-type: none">Makes good decisions that are consistent with the university's, school's, and work unit's mission.Uses resources appropriately (other staff, central campus, etc.)Helpful to others in solving problems and achieving common goals.Develops skills to do job well.	<input type="text"/>	<input type="text"/> 4000 characters remaining
Positive approach to change and improvements <ul style="list-style-type: none">Demonstrates receptiveness to new ideas and approaches.Is flexible in methods of work completion.Shows a willingness to try new methods; takes advantage of learning opportunities.Offers constructive solutions for making effective changes.	<input type="text"/>	<input type="text"/> 4000 characters remaining



COMPLETING EVALUATION -SUPERVISOR: CRITERIA FOR SUCCESS

(Note: Criteria for Success questions could vary by unit/department, however, the most common for School of Education are shown below.)

Performance Criteria

Commitment to the mission of the University and work unit

- Makes good decisions that are consistent with the university's, school's, and work unit's mission.
- Uses resources appropriately (other staff, central campus, etc.)
- Helpful to others in solving problems and achieving common goals.
- Develops skills to do job well.

Positive approach to change and improvements

- Demonstrates receptiveness to new ideas and approaches.
- Is flexible in methods of work completion.
- Shows a willingness to try new methods; takes advantage of learning opportunities.
- Offers constructive solutions for making effective changes.

Commitment to the job

- Grasps the job to be done.
- Meets schedules and deadlines.
- Shows initiative, anticipates needs, and takes appropriate action to make things better.
- Is accurate and avoids careless mistakes.
- Shows an appropriate sense of urgency in completing work and addressing the needs of others.
- Is dependable and reliable.

Commitment to fostering a respectful, effective, and collegial work environment

- Is tactful, honest, and respectful in communications.
- Shows respect for individual differences (lifestyle, behavior, abilities, attitudes, values, and views).
- Provides and accepts guidance and coaching.
- Is approachable and accessible; maintains cooperative work relationships.
- Deals constructively, discreetly, and directly with conflict.
- Supports a positive work environment.

Only complete this section if the employee being evaluated is a supervisor or manager

- Manages employee performance throughout the year and provides frequent feedback.
- Empowers others to make decisions and suggest changes.
- Addresses conflict and brings to a constructive conclusion.
- Leads in a way that promotes a positive work environment.

COMPLETING EVALUATION -SUPERVISOR: GOALS

- The Goal Type can be Current (relevant to the current evaluation period) or Future (relevant to future evaluation periods).
- A Thirty-Day Evaluation will only have future goals.
- All other evaluation types must have at least one current goal (that carried forward from the previous evaluation) and at least one future goal (that will carry forward to the next evaluation).
- Future goals are not rated.

Performance Evaluation

[Back to Performance List](#)

Employee EmpID 00584522
 Employee Name ARNOLD, ALISHA A
 Evaluation Type Summary Evaluation
 Evaluation Status Waiting on Supervisor

[Allow Employee View](#)

General Expectations Criteria for Success **Goals** Employee Self-Appraisal Attachments Overall Rating Status

The Goal Type can be Current (relevant to the current evaluation period) or Future (relevant to future evaluation periods). A Thirty-Day Evaluation will only have future goals. All other evaluation types have at least one current goal (that carried forward from the previous evaluation) and at least one future goal (that will carry forward to the next evaluation). Future goals are not rated. Rating scale: Exemplary, Successful, Developing, Partially Meeting Expectations, Not Meeting Expectations, Unable to Rate/Not Rated.

Goal Type	* Goal Description	Progress Towards Goal	* Rating	Rating Explanation
	Note: 512 character limit Example: Develop a performance management system for the College of Engineering.	Note: 512 character limit Example: Participated on performance management work team.		Note: 1024 character limit

[Add Row](#)

[Save](#) [Save & Next](#)

**Click Add Row to add goals and then
Click Save or Save & Next**

**Make sure you have one Current Goal
and one Future Goal for all evaluation
types except Thirty Day conversation**

COMPLETING EVALUATION -SUPERVISOR & EMPLOYEE: GOALS



Goal Setting - Setting Goals Effectively

The process of setting goals should be a collaborative process between an employee and their manager/supervisor.

✓ **Setting Goals**

- Whether your goal is long-term or short-term the most widely used framework is SMART.

✓ **Aligning Goals**

- Goal alignment is critical for success. Not only does it ensure that each person within a team can see the direction for the business need but also how their specific role fits into the “big picture”.
- Discuss what the strategic goals and objectives are across your division/ school/ college/ department.
- Reduce redundancy – find better ways to support each other.
- Focus efforts on most important/critical goals – assign tasks effectively based on skill sets.
- Understand clearly how all responsibilities are associated with specific goals.
- Strengthen accountability by assigning / communicating clear, measurable and articulated goals.

✓ **Tracking Goals**

- How will you know if you are on the right path to success if you don’t check progress?
- What does success look like and how do I get there?
- Managers need to be aware of progress and assist in resources needed, revisit and re-prioritize if needed.
- Focus daily efforts on meaningful / prioritized tasks.
- Organize and reassess frequently.
- Create action plans.

How can SMART Goals help?

SMART Goals are an effective tool for both managers/supervisors and employees for setting goals and for making sure that everyone is on the right track. They provide detailed information regarding an individual's goal and what success means in terms of that goal. Clear goal setting ensures that all parties are on the same page.

What does "SMART" mean?

Specific

Does the objective tell me precisely what I have to do to succeed?

Measurable

Does the objective tell me how the results will be measured?

Achievable

Does this objective offer me a challenge and stretch?
Is there a reasonable chance I can meet this challenge?

Relevant

Does this objective help support the organizational goals?
Do I possess the knowledge, skills, abilities, and support to complete this?

Time Sensitive

When do I have to have this completed? When do we review progress?

For Additional tools/resources on SMART Goals:



TRE Toolkit

- ▶ Recruitment Planning
- ▶ Recruitment
- ▶ Talent Recruitment and Engagement Management System (TREMS)
- ▶ Applicant Assessment
- ▶ Applicant Communications and Offer Letter Templates
- ▶ Entering the Hire
- ▶ Onboarding

▼ Performance Management

Resources

- Setting Goals and Expectations Conversations
 - [Introduction to SMART Goals eLearning self-study module](#)
 - [SMART Goal Customizable Template](#)
 - [Setting Goals and Expectations Worksheet](#)
 - [New Employee Goals and Expectations Template](#)

tre.ohr.wisc.edu

COMPLETING EVALUATION -SUPERVISOR & EMPLOYEE: ATTACHMENTS



- The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachments examples: letter of commendation, certificate of training, customer feedback or other templates such as SMART Goal template.
- Attachment file size may not exceed 2MB
- HR Admins can also attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

Performance Evaluation

[Back to Performance List](#)

Employee EmpID 00584522
Employee Name ARNOLD, ALISHA A
Evaluation Type Summary Evaluation
Evaluation Status Waiting on Supervisor

[Allow Employee View](#)

[General](#) [Expectations](#) [Criteria for Success](#) [Goals](#) [Employee Self-Appraisal](#) **[Attachments](#)** [Overall Rating](#) [Status](#)

The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachment examples: letter of commendation, certificate of training, resume, customer feedback. Attachment file size may not exceed 2MB.

Human resources can attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

The uploaded file must not exceed 2MB in size.

Attachment	<input type="text"/>	Browse...
Employee Attachment	No attachment.	
HR Attachment	No attachment.	

[Save](#) [Save & Next](#)

Click on browse to select the file you wish to upload and then click Save

COMPLETING EVALUATION -SUPERVISOR: ALLOW EMPLOYEE VIEW

Once the supervisor completes the General, Expectations, Criteria for Success and Goals tabs they should allow the employee to view the evaluation.

Once you are ready for the employee to review the document click **Allow Employee View**.

Performance Evaluation [Back to Performance List](#)

Employee EmpID	00774557
Employee Name	GALLAY, ERIN E
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Supervisor

Allow Employee View

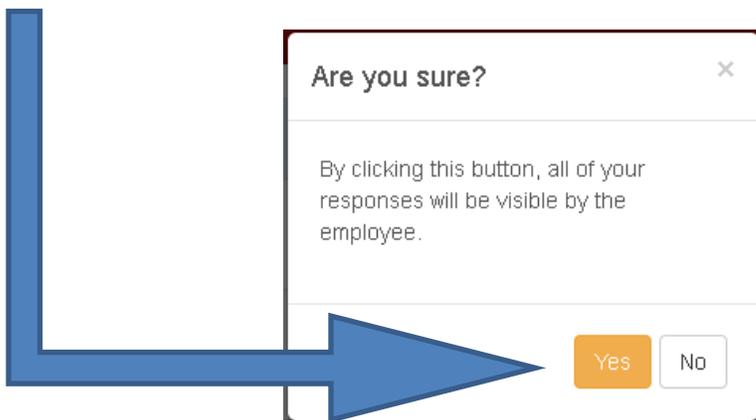
General Expectations Criteria for Success Goals Employee Self-Appraisal Attachments Overall Rating **Status**

Green circles indicate completed steps. Red circles indicate next steps required for progress and blue circles indicate pending steps that will be available when the red steps are complete. The list will reflect the status of each content tab.

```
graph LR; M1((1)) --- M2[Manager Content]; E1((1)) --- E2[Employee Content]; M1 --- E2; M1 --- F2((2)); E1 --- F2; F2 --- A3((3)); F2 --- A3; style M1 fill:#f00,stroke:#f00; style E1 fill:#0f0,stroke:#0f0; style F2 fill:#0ff,stroke:#0ff; style A3 fill:#0ff,stroke:#0ff;
```

Evaluation Status The supervisor has not completed their portion by marking the evaluation 'Allow Employee View'.

Click **yes** to allow the employee to view your responses.



COMPLETING EVALUATION -SUPERVISOR: WAITING ON DISCUSSION

After the supervisor clicks “Allow Employee View”, the employee will receive an email notification. The next step is to have a conversation with the employee and then each of you will finalize your portions.

Status Changes to Waiting on Discussion

Performance Evaluation [Back to Performance List](#)

Employee EmplID	00774557
Employee Name	GALLAY, ERIN E
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Discussion

[Finalize Evaluation](#)

General Expectations Criteria for Success Goals Employee Self-Appraisal Attachments Overall Rating **Status**

Green circles indicate completed steps. Red circles indicate next steps required for progress and blue circles indicate pending steps that will be available when the red steps are complete. The list will reflect the status of each content tab.

Evaluation Status The evaluation has not yet been finalized. This should occur after the Employee/Supervisor discussion takes place.

Expectations All items complete.

Criteria for Success All items complete.

Goals All items complete.

Employee Self-Appraisal All items complete.

Overall Rating An overall rating has not been selected on the Overall Rating tab.

COMPLETING EVALUATION -SUPERVISOR: OVERALL RATING

The performance management policy requires that an overall rating of **Meeting Expectations** or **Not Meeting Expectations** be used as a measurement for both the Mid-Point Conversation and Summary Evaluation Types. Click on Overall Rating Tab. To select Overall Rating click **Overall Rating** on Drop Down

General Expectations Criteria for Success Goals Employee Self-Appraisal Attachments **Overall Rating** Status

Overall Rating will reflect Meeting Expectations or Not Meeting Expectations once completed by the supervisor. The performance evaluation is av

Overall Rating *

Additional Performance

Meeting Expectations

Not Meeting Expectations

View Performance Evaluation As PDF

COMPLETING EVALUATION -SUPERVISOR: CONVERSATION DATE

In addition to the overall rating, the supervisor must also enter the date the performance conversation took or will take place. The supervisor can also input additional comments in the Additional Performance Information section.

Performance Evaluation [Back to Performance List](#)

Employee EmpID	00040383
Employee Name	STEWART, ANN T
Employee Unit	VET M/SA I/SA-TECHS - VETERINARY TECH 3
Evaluation Type	Summary Evaluation (1/1/2017 - 12/31/2017)
Evaluation Status	Waiting on Supervisor Allow Employee View

General Expectations Criteria for Success Goals Attachments **Overall Rating** Status

Overall Rating will reflect Meeting Expectations or Not Meeting Expectations once completed by the supervisor. The performance evaluation is available to download and print.

Overall Rating

Conversation Date

Additional Performance Information



COMPLETING EVALUATION -EMPLOYEE

After the conversation, the employee can modify their self-appraisal and attachments if needed. Employee should make any changes prior to the supervisor finalizing the evaluation.

Performance Evaluation [Back to Performance List](#)

Employee EmpID	00252846
Employee Name	BALLY, JOY
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Discussion

[General](#) [Expectations](#) [Criteria for Success](#) [Goals](#) **Employee Self-Appraisal** [Attachments](#) [Overall Rating](#) [Status](#)

Employee Status Employee Section Complete

Self-Appraisal is an opportunity for the employee to highlight key accomplishments during the evaluation period and areas for development. Responses will be visible to the supervisor once the employee allows. Employee may modify content until the evaluation is finalized. [Save](#)

Question	Answer
Describe a time in the last year when you were proud of the role that you played working with your team or co-workers.	

Make any changes needed and then click on **Save** or **Save & Next**.

Performance Evaluation [Back to Performance List](#)

Employee EmpID	00774557
Employee Name	GALLAY, ERIN E
Evaluation Type	Summary Evaluation
Evaluation Status	Waiting on Discussion

[General](#) [Expectations](#) [Criteria for Success](#) [Goals](#) [Employee Self-Appraisal](#) **Attachments** [Overall Rating](#) [Status](#)

The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachment examples: letter of commendation, certificate of training, resume, customer feedback. Attachment file size may not exceed 2MB.

Human resources can attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

The uploaded file must not exceed 2MB in size.

Attachment [Browse...](#)

Supervisor Attachment No attachment.

HR Attachment No attachment.

[Save](#) [Save & Next](#)



FINALIZING EVALUATION -SUPERVISOR

You have allowed employee view-access to your responses. The employee can now see your responses and will be able to see any modifications immediately.

Performance Evaluation

[Back to Performance List](#)

Employee EmplID 00584522
Employee Name ARNOLD, ALISHA A
Evaluation Type Summary Evaluation
Evaluation Status Waiting on Discussion

Finalize Evaluation

General Expectations Criteria for Success Goals Employee Self-Appraisal Attachments Overall Rating **Status**

Green circles indicate completed steps. Red circles indicate next steps required for progress and blue circles indicate pending steps that will be available when the red steps are complete. The list will reflect the status of each content tab.



Once performance conversation takes place employee and supervisor finalize their portions.

Supervisor clicks "Finalize Evaluation"

Then clicks Yes.

Status Changes to Waiting on Employee Acknowledgement

Are you sure? ✕

By finalizing the evaluation, the evaluation will be emailed to the employee/HR and you will no longer be able to make changes.

Performance Evaluation

Employee EmplID 00584522
Employee Name ARNOLD, ALISHA A
Evaluation Type Summary Evaluation
Evaluation Status Waiting on Employee Acknowledgement

FINALIZING EVALUATION -EMPLOYEE

Once employee reviews Clicks on “Employee Acknowledgement”

Performance Evaluation

Employee EmplID	00584522	
Employee Name	ARNOLD, ALISHA A	
Evaluation Type	Summary Evaluation	
Evaluation Status	Waiting on Employee Acknowledgement	Employee Acknowledgement

Employee Acknowledgement ×

I have reviewed this evaluation and **AGREE** with the content.

I have reviewed this evaluation and **DISAGREE** with the content. (Please add comments below.)

Comments

[Acknowledge](#)

Employee Can Agree or Disagree with content and add any comments.

Click Acknowledge

Evaluation Type	Summary Evaluation (1/1/2017 - 12/31/2017)
Evaluation Status	Complete

[General](#)
[Expectations](#)
[Criteria for Success](#)
[Goals](#)
[Employee Self-Appraisal](#)
[Attachments](#)
[Overall Rating](#)

Overall Rating will reflect Meeting Expectations or Not Meeting Expectations once completed by the supervisor. The performance evaluation is available to download and print.

Overall Rating * ⓘ

Conversation Date * ⓘ

Additional Performance Information

4000 characters remaining

[View Performance Evaluation As PDF](#)
[Download](#)

Performance Evaluation is now complete

- Employee and Supervisor get email and can review documentation
- Employee and Supervisor can go in to review but not change
- Can download PDF copy from within review on Overall Rating Tab



What questions do you have about the process or PMDP?

THANK YOU



TO REPORT SYSTEM PROBLEMS OR FOR ANY QUESTIONS:

- Contact your Division/Department HR representative