PMDP

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM

Division & Department HR Administrative Training

Talent Recruitment and Engagement
OFFICE OF HUMAN RESOURCES
UNIVERSITY OF WISCONSIN–MADISON

Table of Contents

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM (PMDP)

PMDP is a 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.

DIVISION &DEPARTMENT HR ADMINISTRATION

This module is geared toward learning the HR administrative performance management functions within PMDP.

PURPOSE

The purpose of this module is to introduce you to the PMDP administrative environment and the procedures for setting up individuals in the system as well as sustaining, maintaining and tracking Division/Department performance management activities in compliance with the performance management policy. Division/Department responsibilities within the performance management policy include:

- Monitor and maintain a performance management system that complies with the policy and supports employee and College/School/Division/Department needs
- Oversee performance management document workflow and retention programs within the division
- Provide guidance and support to supervisors and employees with the unit's specific performance management processes including cycle timelines, documentation requirements and process questions
- Consult with Division HR and OHR as needed

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
- Preform admin functions such as setting up users and monitoring performance activities
- Identify additional functionality to assist managers/supervisors/employees

What are your expectations for this class?

SYSTEM ACCESS

PMDP is accessed at **pmdp.hr.wisc.edu** or through MyUW portal.   The system requires single sign on with your UW-Madison NetID and password.

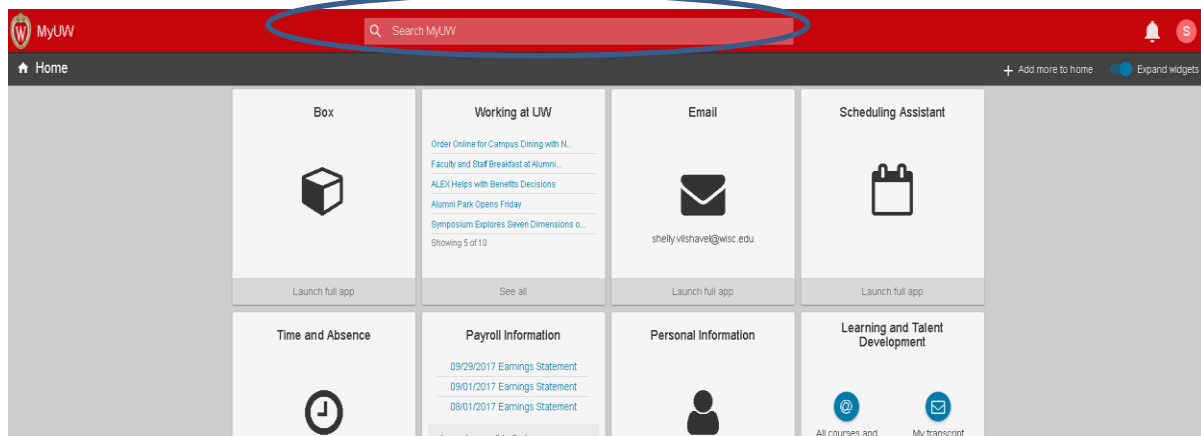Go to **pmdp.hr.wisc.edu** and you will be directed to log in with your NetID and password

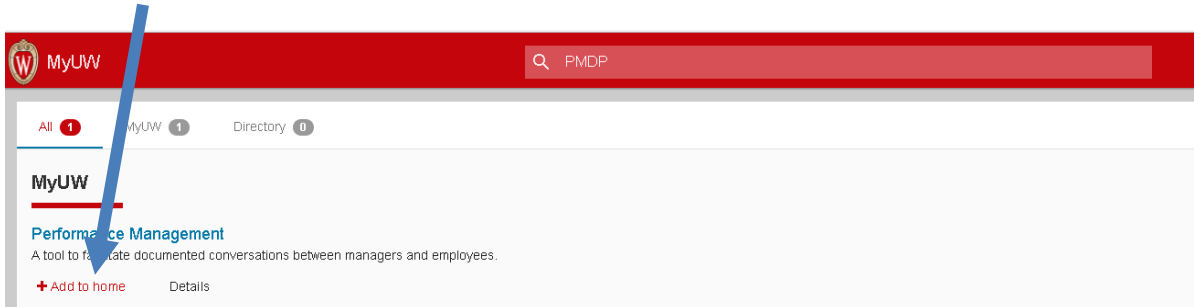**OR** add PMDP to your MyUW portal home page.
Go to MyUW Home and type **PMDP** in the search box

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:
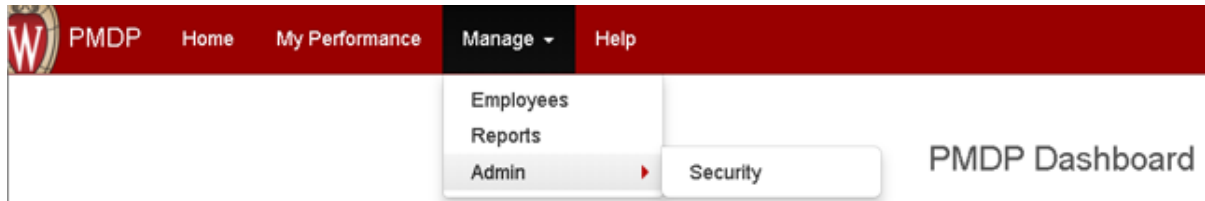
Permission Group	Description
Employee	Access to the employee's performance activities only. Additionally, all performance activities completed for the employee within PMDP will be available to the employee within PMDP on demand (24/7) through the website and MyUW portal.
Supervisor	Has access to performance 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.

Notes:
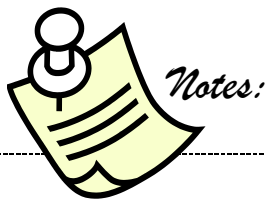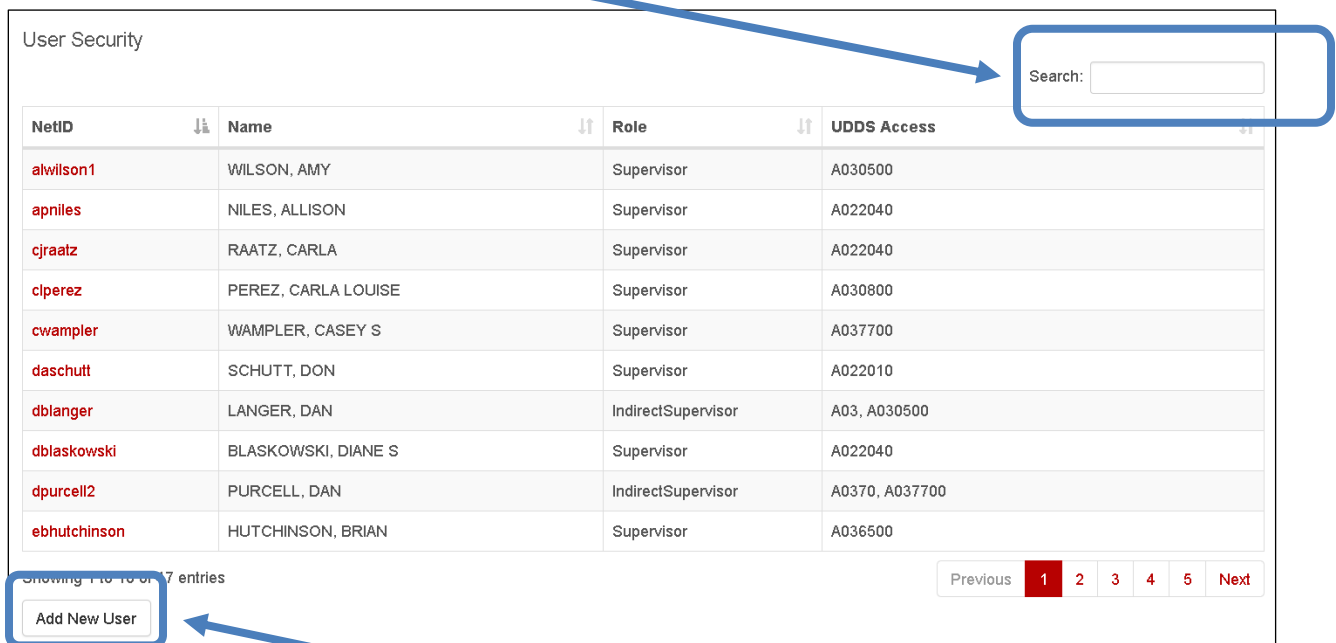
PERMISSION GROUPS: ASSIGNING INDIRECT SUPERVISOR PERMISSION

Division and Department HR Administrators will be responsible for assigning and maintaining the Indirect Supervisor permission group.

From the top menu bar click on **Manage – Admin – Security**

Search for the employee you wish to give Indirect Access to in the Search field.

If the employee isn't already a supervisor, you will need to click Add New User on the bottom of the screen.

PERMISSION GROUPS: ASSIGNING INDIRECT SUPERVISOR PERMISSION

1. Select Indirect Supervisor for the Role.
2. Enter the specific UDDS(s) the Indirect Supervisor should be able to see – then Add.
3. Enter comments (required) in the comments field. Your name or initials and date and any specific division information your area may require.
4. Click Save User.

User Information

Name   HUTCHINSON, BRIAN

NetID   ebhutchinson

1.   **Choose Indirect Supervisor from Role Choices**

Role   IndirectSupervisor   ▾

Email   brian.hutchinson@wis

2.   **Enter specific UDDS and click Add**

UDDS Access   [   ]   Add

*You may assign UDDS Access under A0220, A03.

A036500   ✖

Comments   [   ]

3.   **Enter comments – name or initials and date**

4000 characters remaining
This field is required

4.   **Click Save User on bottom right of screen**

Cancel   Save User

PERMISSION GROUPS: REMOVING INDIRECT SUPERVISOR PERMISSION

From the top menu bar click on **Manage – Admin – Security**
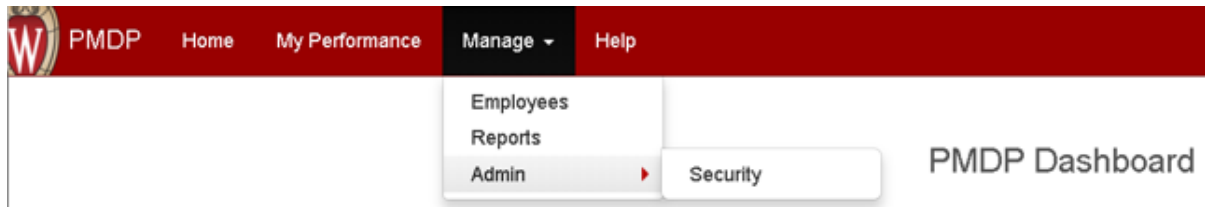
Search for the employee in the Search field.

C**lick on employee name in red under NetID**

PERMISSION GROUPS: REMOVING INDIRECT SUPERVISOR PERMISSION

Click delete

NetID	Name	Role	UDDS Access	
ebhutchinson	HUTCHINSON, BRIAN	Supervisor	A036500	Delete

Click delete again if you are sure you want to delete the user

Delete this record? ✕

Are you sure you want to delete this user?

Cancel | **Delete**

Notes:

HR AMIN DASHBOARDS

HR Department and Division Administrators will have four tabs to view on the PMDP Dashboard.

The four tabs all HR Admin will have are:
- HR Admin
- Performance Management
- Needing Creation
- Changed Supervisors

PMDP Dashboard

HR Admin   Performance Management   Needing Creation   Changed Supervisors

HR AMIN TAB

The HR Admin tab gives a snapshot view of the divisions and/or departments that you have access to see. It allows the HR Admin to see the performance activity statistics for the calendar year. Additionally, you can drill down into each of the UDDS that you have access to in order to view that specific UDDS snapshot.

HR Admin   Performance Management   Needing Creation   Changed Supervisors

Performance evaluation statistics based on UDDS.

Search:

UDDS	Total Employees	Overdue	Notification	Week Out	Month Out	Completed in September	Completed in 2017
A480200	1	1	Send Communication	0	0	0	1
A483000	2	2	Send Communication	0	0	0	0
A484000	1	1	Send Communication	0	0	0	0
A484120	18	18	Send Communication	0	0	0	0
A484260	20	20	Send Communication	0	0	0	0
A484400	6	6	Send Communication	0	0	0	0
A484700	4	4	Send Communication	0	0	0	0
A484800	3	3	Send Communication	0	0	0	0
A484900	9	9	Send Communication	0	0	0	0
A485000	10	10	Send Communication	0	0	0	1
Total:	74 (160)	74 (160)		0 (0)	0 (0)	0 (0)	2 (7)

Supervisor Details ✕

Search:

Supervisor	Number of Emloyees	Overdue	Week Out	Month Out
DAVIDSON, RICHARD J	1	1	0	0
DOLSKI, ISA V	1	1	0	0

Showing 1 to 2 of 2 entries

Previous 1 Next

When you drill down into each unit, you can also click on each supervisor within that unit to view the details of each supervisor's performance activities.

Supervisor	Number of Emloyees	Overdue	Week Out	Month Out
DAVIDSON, RICHARD J	1	1	0	0
DOLSKI, ISA V	1	1	0	0

Showing 1 to 2 of 2 entries

Employee Details

Name	EmplID	Position Number	Previous Evaluation		Current Evaluation	
			Type	Date Completed	Type	Date Started
DOLSKI, ISA V	00161783	01348550				

Showing 1 to 1 of 1 entries

Notes:

HR AMIN TAB – EMAIL COMMUNICATIONS:

You can choose to send email communications to supervisors from PMDP for the following:
- Overdue Notification (performance activities are past due)
- Start Evaluation (it is time to begin performance activities)
- Other (custom email communication)

Click Send Communication in the Notification column for the UDDS you need.

UDDS	Total Employees	Overdue	Notification	Week Out	Month Out	Completed in September	Completed in 2017
A480200	1	1	Send Communication	0	0	0	1
A483000	2	2	Send Communication	0	0	0	0
A484000	1	1	Send Communication	0	0	0	0
A484120	18	18	Send Communication	0	0	0	0
A484260	20	20	Send Communication	0	0	0	0
A484400	6	6	Send Communication	0	0	0	0
A484700	4	4	Send Communication	0	0	0	0

Select the supervisor(s) you wish to send the email to. Choose Communication Type and Click Send Communication.

Send Communication for UDDS A484700

All supervisors in this UDDS are selected for notification by default.
Please uncheck any supervisors that should not be notified at this time.

Search:

☑	Supervisor	
☑	BATZLI, JANET C	
☑	HARDIN, JEFF	

Showing 1 to 2 of 2 entries   Previous 1 Next

Communication Type [▼]

Cancel   Send Communication

HR AMIN TAB – EMAIL COMMUNICATIONS:

The communication types are:
- Send Overdue Notification (performance activities are past due)
- Start Evaluation (it is time to begin performance activities)
- Other (custom email communication)
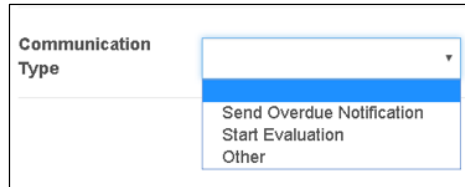
When you click on Send Communication, an outlook window will pop up and you will be able to edit or customize the message.

The supervisor(s) you select will be blind copied (Bcc) on the email message. The HR Administrator who initiated the communication will send it directly from outlook and therefor will have the message in their "sent" folder or can copy (Cc) themselves or others on the message. The email is sent to the supervisor and the employee is not copied.
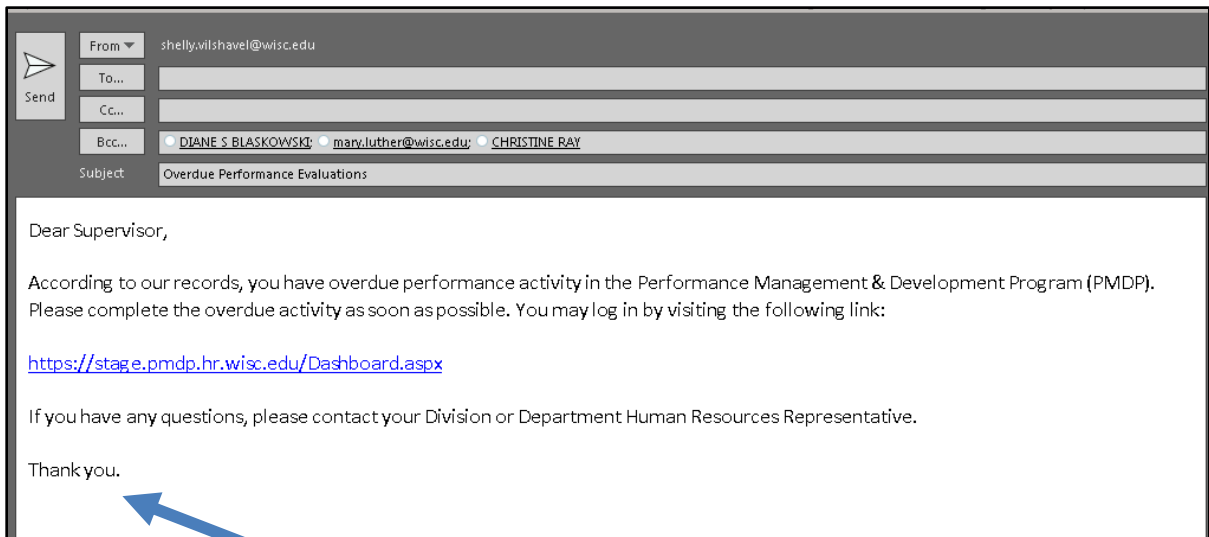
You can now put your signature on the email and modify as you see fit.

Notes:

HR AMIN TAB – EMAIL COMMUNICATIONS:

Send Overdue Notification (performance activities are past due)

Dear Supervisor,

According to our records, you have overdue performance activity in the Performance Management & Development Program (PMDP). Please complete the overdue activity as soon as possible. You may log in by visiting the following link:

https://stage.pmdp.hr.wisc.edu/Dashboard.aspx

If you have any questions, please contact your Division or Department Human Resources Representative.

Thank you.

Start Evaluation (it is time to begin performance activities)

Dear Supervisor,

It is time to begin the performance activity for the employees you supervise. You may log in to the Performance Management & Development Program (PMDP) by visiting the following link:

https://pmdp.hr.wisc.edu/Dashboard.aspx

If you have any questions, please contact your Division or Department Human Resources Representative.

Thank you.

Other (custom email communication)

From shelly.vilshavel@wisc.edu
To...
Cc...
Bcc... DIANE S BLASKOWSKI; mary.luther@wisc.edu; CHRISTINE RAY
Subject

Shelly Vils Havel
Performance Management Consultant | Program Manager
Talent Recruitment & Engagement | Office of Human Resources
21 N. Park Street #5441, Madison, WI 53715
608.890.2540 | shelly.vilshavel@wisc.edu | jobs.wisc.edu

Customize your email from a blank email template

TOUR THE EMPLOYEE DETAILS

From the HR Dashboard, you can continue to drill down into the specific employees under each supervisor as well as the details of each employee's performance activities. Like most software, actions can be found in multiple places.

Employee Details

Search: [   ]

Name	EmplID	Previous Evaluation		Current Evaluation	
		Type	Date Completed	Type	Date Started
BACULIK, SUSAN C	00392833				
BOWERS, LAUREN M	00444415			Summary Evaluation	7/19/2017 11:35:44 AM
FINI-MARTEN, ERICA C	0044648				
PALAU, ADIN Q	0035849				
RAY, CHRISTINE	0052867				
SU, NAI-FEN	0084858				
VILS HAVEL, MICHELLE	00795341			Summary Evaluation	7/13/2017 10:56:04 AM

Showing 1 to 7 of 7 entries

Previous 1 Next

> By clicking on the EmplID you will see the Performance Evaluation History for the employee

> By clicking on the Evaluation type, you will go into that specific evaluation

Performance Evaluation History

Back to Employee Details

EmplID   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

Performance Evaluation

Back to Performance List

Employee EmplID   00795341
Employee Name   VILS HAVEL, MICHELLE
Evaluation Type   Summary Evaluation
Evaluation Status   Waiting on Supervisor   [Close Eval]

General   Expectations   Goals   Employee Self-Appraisal   Attachments   Overall Rating   Status

Thank you for your participation in this performance management process. Identifying areas of strength and opportunities for growth is an important activity in fostering development of UW-Madison employees.

Please give each section thoughtful consideration. You may return multiple times to complete this evaluation. All content may be modified by the person who creates it, until the evaluation is finalized by the supervisor.

Supervisor   Mark Tyler Wood

Evaluation Type *   Summary Evaluation   ▼

Evaluation Period Start Date * 12/16/2015

Evaluation Period End Date *   07/13/2017

TOUR THE EMPLOYEE DETAILS

Another way to find the employee details is to go on the top menu bar and select Manage – Employees

PMDP   Home   My Performance   Manage ▾

Employees

Employees

Add, View, or Update PMDP Employees

Search Employee   [EmplID or Last Name]   Search
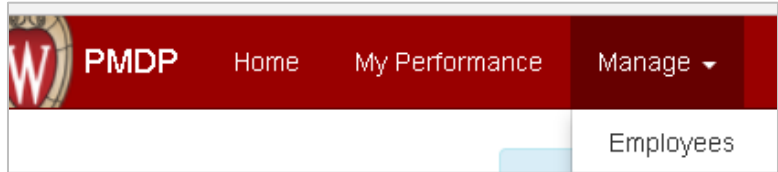
Name

UDDS

EmplID

Position Number

PMDP Employee Status

PMDP Position Status

Start Date   [Start Date]

Probation End Date   [Probation End Date]

Employee Type   [▼]

Probation Period   [▼]

Supervisor   [Supervisor]   [...]

Performance Review

Type in the EmplID or the employee last name and click search.

Employees

Add, View, or Update PMDP Employees

Search Employee   [EmplID or Last Name]   Search

Name   VILS HAVEL, SHELLY

UDDS   A022050

EmplID   00795341

Position Number   02131542

PMDP Employee Status   ✓ -- Exists in PMDP System.

PMDP Position Status   ✓ -- Exists in PMDP System.

Start Date   12/16/2015

Probation End Date   12/15/2016

Employee Type   Academic Staff   [▼]

Probation Period   12 Months   [▼]

Supervisor   WOOD, TYLER   [...]

Performance Review   Performance Evaluation History

Clicking on **Performance Evaluation History** will take you to Employee's Evaluation Activity History

HR NEEDING CREATION TAB

The HR Needing Creation Tab will be used two ways:

1. Initially to set up your department's supervisor / employee relationship structure into PMDP
2. As new employees are hired to assign a supervisor / employee relationship structure

INITIAL DEPARTMENT/DIVISION SET UP

Initially to set up your department's supervisor / employee relationship structure into PMDP enter the department or division into the Field and click "Search".

Review the information and click "Add All"

If you have a smaller unit and need to review the information individually, you can also click "Add" to add each employee individually.

INITIAL DEPARTMENT/DIVISION SET UP

Employees who have no supervisor listed **will not** automatically be added when selecting "Add All"

If an employee has no supervisor listed in PMDP, click "View"

DAUSCHMIDT, CARL E		02134548	BUDGET PLANNER/M	A92301	View

Employee

Search	EmplID or Last Name	Search
EmplID	00603936	
Name	DAUSCHMIDT, CARL E	
Nickname	Nickname	
Position Number	02134548	...
Start Date	2/1/2016	
Probation End Date	1/31/2017	
Employee Type	Academic Staff ▼	
Probation Period	12 Months ▼ ❓	
Supervisor	Supervisor	...

Click ... next to Supervisor

Performance Review

Assign Supervisor ✕

Search:

	NetID	Name
Select	aaarnold	ARNOLD, ALISHA A
Select	abharris3	HARRIS, ANNE B
Select	abhattachary	BHATTACHARYYA CONSIGNY, ANITA
Select	abradshaw	BRADSHAW, ANN E
Select	acpalmen	PALMENBERG, ANN C
Select	adlyle	LYLE, AMY DYANE
Select	adwhiteh	WHITEHEAD, AMY D
Select	aejunker	JUNKER, AXEL E
Select	aewendt	WENDT, AMY E
Select	aewer	EWER, ALISSA A

Begin typing supervisor's last name and if they do not appear click New Supervisor.

Showing 1 to 19 of 412 er | Previous | **1** | 2 | 3 | 4 | 5 | ... | 42 | Next

Remove Supervisor | New Supervisor

INITIAL DEPARTMENT/DIVISION SET UP

Add New Supervisor   ✕

Supervisor   mather

MATHER, KATHRYN JEAN ([Undefined])

Select the appropriate supervisor

Employees

Add, View, or Update PMDP Employees

Search Employee   [EmplID or Last Name]   [Search]

Name   DAUSCHMIDT, CARL

UDDS   A022011

EmplID   00603936

Position Number   02134548

PMDP Employee Status   ✓ -- Exists in PMDP System.

PMDP Position Status   ✓ -- Exists in PMDP System.

Start Date   [2/1/2016]

Probation End Date   [1/31/2017]

Employee Type   [Academic Staff ▾]

Probation Period   [▾]

Supervisor   [MATHER, KATHY   ...]

Performance Review   Performance Evaluation History

[Cancel Update] [Save Update]

Click Save Update

Notes:

CHANGE SUPERVISORS TAB:

The Change Supervisors Tab will populate from HRS looking at PMDP. When a supervisor in the reports to field in HRS is different than the supervisor in PMDP it will show up on the changed supervisors tab.

- Very what is correct (HRS or PMDP)
- Click View next to employee
- This will bring up the employee record and if you need to change the supervisor, click on the tab next to supervisor

PMDP Dashboard

HR Admin   Needing Creation   Changed Supervisors

Employees that have different assigned supervisors in HRS

Show [10 ▼] entries   Search: [   ]

Name	Position Number	UDDS	PMDP Supervisor	HRS Supervisor	
BROADBERRY, SUZANNE E	02084606	A055000	ABING,VERA A	HULL,PHILLIP W	View
KRAUS, WILLIAM	02144996	A062080	ZOELLNER,RUSSELL PAUL	FIELD,MARK E	View
MESSING, ALBEE	02112780	A348700	SCHROEDER,PETRA	GOLDEN,ROBERT N	View
NOVAK, NICHOLAS N	02077360	A340256	RICHARDS,ANDREW J	SCHROEDER,PETRA	View
RIELLY, JULIA B	02117996	A340215	BAUER,TRISHA L	KARPELENIA,JULIE A	View
SIMONSON, RACHEL A	02070899	A340215	BAUER,TRISHA L	KARPELENIA,JULIE A	View

Showing 1 to 6 of 6 entries   Previous [1] Next

Employee

Search	[EmplID or Last Name] [Search]
EmplID	00300546
Name	RIELLY, JULIA B
Nickname	[Nickname]
Position Number	[02117996] [...]
Start Date	[6/14/2015]
Probation End Date	[Probation End Date]
Employee Type	[University Staff ▼]
Probation Period	[6 Months ▼] ❓
Supervisor	[BAUER, TRISHA L] [...]
Performance Review	Performance Evaluation History

CLOSING AND RE-OPENING AN EVALUATION

There are certain circumstances in which HR Administrators need to close and re-open evaluations.

- Supervisor started in error and cannot delete – move forward – and evaluation is not able to be finalized.
- Supervisor or employee left the department prior to evaluation being completed.
- Employee or supervisor needed to attach or re-attach a document
- Open evaluation and supervisor has changed – You cannot change the supervisor if there is an open evaluation
- Other as needed by division/department

HOW TO: CLOSE AN EVALUATION

- From your dashboard click on Manage – Employee – Search Employee – Click on Performance History

- or From the HR Admin tab click on the UDDS of the department and drill down to the supervisor and then to the employee – Click on either the EmplID or the Evaluation Type

- Click Close Eval

Performance Evaluation

Employee EmplID	00231029
Employee Name	SWENSON, JESSICA E
Evaluation Type	Thirty Day Conversation
Evaluation Status	Waiting on Supervisor

Close Eval

General   Expectations   Goals   Attachments   Overall Rating   Status

Human Resources Closing Evaluation   ×

◉ Human Resources is closing this evaluation. (Please add comments below.)

Comments [   ]

Close Evaluation

Comments are required for the reason evaluation is being closed by HR

HOW TO: RE-OPEN AN EVALUATION

- From your dashboard click on Manage – Employee – Search Employee – Click on Performance History

- or From the HR Admin tab click on the UDDS of the department and drill down to the supervisor and then to the employee – Click on either the EmplID or the Evaluation Type

- View the evaluation

- Click on Re-Open Eval

Performance Evaluation

Employee EmplID	00030691	Re-Open Eval
Employee Name	MOY, DEBBIE M	
Evaluation Type	Midpoint Conversation	
Evaluation Status	Closed By HR	

General   Expectations   Goals   Attachments   Overall Rating

Human Resources Re-opening Evaluation   ✕

● Human Resources is re-opening this evaluation. (Please add comments below.)

Comments [   ]

4000 characters remaining

Re-Open Evaluation

Comments are required for the reason evaluation is being re-opened by HR

Once Evaluation has been re-opened:

- Supervisor and employee can make changes to any sections they are responsible for completing
- Supervisor and employee need to allow each other to view (Go through process again to confirm they are both aware of any changes
- Supervisor finalizes, and employee acknowledges

ATTACHING A DOCUMENT

- 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 EmplID	00030691
Employee Name	MOY, DEBBIE M
Evaluation Type	Midpoint Conversation
Evaluation Status	Closed By HR

Re-Open Eval

General   Expectations   Goals   **Attachments**   Overall Rating

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   Sample Summary Performance Evaluation 2.17.pdf

Employee Attachment   Final Midpoint Conversation 3.17.pdf

Save

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

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ACKNOWLEDGING ON BEHALF OF THE EMPLOYEE

- If an employee refuses to acknowledge receipt of the evaluation, HR Admin has the capability to acknowledge on behalf of the employee

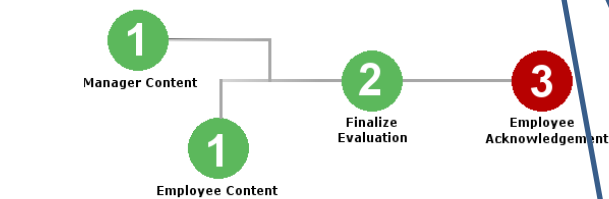- This functionality should only be used in cases where employee will not sign off on the evaluation

Click on Employee Acknowledgement

Type in comments and click acknowledge

LOG: HISTORY AND COMMENT TRACKER

The Log tab is an administrative tab that only Department / Division HR will see. The Log captures certain evaluation status history and serves as a comment area for HR Administration to keep notes pertaining to the evaluation if necessary.

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

The activity log collects information about status changes in the evaluation. You may also add additional comments about the evaluation by using the 'Add Comment' button to the right. This activity log and all associated comments are only visible to HR staff.

Add Comment

Action	Comment	Date	Modified By
Evaluation re-opened by HR.	Employee needed to add additional information to the self appraisal and supervisor agreed - re-opening evaluation.	10/25/2018 2:00:19 PM	vilshavel

To Add a comment click Add Comment

Type in the comment and click Submit

Add Comment

Add a comment about this evaluation:

Submit

Notes:
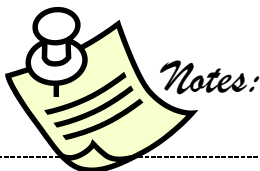
SAMPLE EMAIL COMMUNICATIONS FOR EMPLOYEES AND SUPERVISORS:

Performance Activity Ready to View	Supervisor Complete

Dear {{EMPLOYEE_NAME}},

Your supervisor has allowed you to view your {{EVALUATION_TYPE}} and can be accessed via this link:
{{PERFORMANCE_LINK}}

You can review all information and ratings but can only make changes to the self-appraisal and/or upload an attachment. (The self-appraisal tab is only included on Summary Evaluation and Summary Probation Evaluation types.) The next step is to have a conversation with your supervisor. If you have any changes to make you will need to complete those prior to your supervisor finalizing the evaluation. Your supervisor will then finalize their portion. You will receive an email notification when the evaluation has been finalized and is waiting for your acknowledgement.

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Performance Activity Started	Evaluation Started (Thirty Day, Mid Probation, and Midpoint)

Dear {{EMPLOYEE_NAME}},

A performance activity has been started by your supervisor {{MANAGER}}. Once your supervisor is ready for you to view the information you will receive an email with a link to the evaluation. There is no action needed on your part until you receive the email.

Thank you. If you have any questions, please contact your supervisor or your Human Resources unit.

Performance Activity Started	Evaluation Started (Summary and Summary Probation)

Dear {{EMPLOYEE_NAME}},

A performance evaluation activity has been started by your supervisor. You are now able to work on the self-appraisal portion of the evaluation. Your input in the self-appraisal will assist in conversations with your supervisor. You can also add an attachment if desired. You do not have to complete all at once. You can log back in at any time. Your supervisor will not be able to see your self-appraisal until you have allowed their access to view.

When you have completed the self-appraisal and added an attachment (if desired), click on the yellow box at the top of the page that says "Allow Supervisor View".

The evaluation can be accessed via this link:
{{PERFORMANCE_LINK}}

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

SAMPLE EMAIL COMMUNICATIONS FOR EMPLOYEES AND SUPERVISORS:

Performance Evaluation Complete	Employee Acknowledgement

Dear {{EMPLOYEE_NAME}},

Your performance activity has been completed and is ready to view via this
link: {{PERFORMANCE_LINK}}

You can access the Performance Management & Development Program (PMDP) to view this or other
evaluation activity completed in PMDP.

{{AGREES_OR_DISAGREES_STATEMENT}}

{{EVALUATION_PDF_LINK}}

{{EMPLOYEE_ATTACHMENT_LINK}}

{{MANAGER_ATTACHMENT_LINK}}

{{HR_ATTACHMENT_LINK}}

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Employee Self-Appraisal Complete	Employee Complete (Summary and Summary Probation)

Dear {{MANAGER}},

Your employee {{EMPLOYEE_NAME}} has completed the self-appraisal portion of the performance
evaluation and you now have access to view. You can access via this link:
{{PERFORMANCE_LINK}}

The next step is to review the employee self-appraisal, complete your portions of the evaluation and
allow employee to view/review the information. Your portions of the evaluation that need to be
completed before allowing employee to view are: General, Expectations, Criteria for Success (if
applicable) and Goals.

Once you have the performance conversation with {{EMPLOYEE_NAME}} you will need to make any
changes (if applicable), complete the overall rating tab and when ready click "Finalize Evaluation."

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

SAMPLE EMAIL COMMUNICATIONS FOR EMPLOYEES AND SUPERVISORS:

Employee Acknowledgement	Evaluation Complete

Dear {{EMPLOYEE_NAME}},

Your {{EVALUATION_TYPE}} has been finalized by your supervisor {{MANAGER}}. You are now able to view the information and acknowledge receipt. You can access via this link: {{PERFORMANCE_LINK}}

You will not be able to make any changes, but can add final comments when you acknowledge. Click on the "Employee Acknowledgement" and agree or disagree with the content. Add comments if desired. Click on "Acknowledge".   Once this step has been completed you and your supervisor will receive an email with a link to the PDF of your evaluation and any attachments (if applicable).

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Employee Complete (Thirty Day, Mid Probation, and Midpoint)	Employee Complete (Thirty Day, Mid Probation, and Midpoint)

Dear {{MANAGER}},

Your employee {{EMPLOYEE_NAME}} has had the opportunity to review the evaluation information, uploaded an attachment if desired and allowed supervisor view. You can access via this link: {{PERFORMANCE_LINK}}

The next step is to review the attachment (if applicable), meet with employee and have a performance conversation.

Once you have the performance conversation with {{EMPLOYEE_NAME}} you will need to make any changes (if applicable), complete the overall rating tab and when ready click "Finalize Evaluation."

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

SAMPLE EMAIL COMMUNICATIONS FOR HR ADMINISTRATORS:

If the employee receives a Not Meeting Expectation on any evaluation the following message is sent only to the HR Administrator team – not to the supervisor or employee:

Employee Is Not Meeting Expectations	Employee is Not Meeting Expectations

Dear Human Resources Representative:

A performance evaluation for {{EMPLOYEE_NAME}} has been completed and is ready to view via this link:
{{PERFORMANCE_LINK}}.

The Overall Rating is Not Meeting Expectations.

Thank you.

Notes:

IMPORTANT REMINDERS:

- Once a supervisor and employee finalize the evaluation, an email will be sent with an attached PDF copy of the evaluation:
  - o To: Employee
  - o CC: Supervisor
  - o BCC: Division/Department HR
- Department HR Administrators are responsible for ensuring a copy is transferred into the employee P-File (electronic or paper)

REPORTS:
- See Performance Activity Job Aid (**tre.ohr.wisc.edu** – toolkit – Performance Management & Development Program (PMDP) – Performance Activity Report Job Aid)
- **https://tre.ohr.wisc.edu/documents/Performance%20Activity%20Report%20Job%20Aid.pdf**
- Report Start Date and Report End Date is checking against the Evaluation Period Start Date (e.g. date range of 1/1/2017- 12/31/2017 would return performance activity that had an evaluation period start date within that range.)

FOR QUESTIONS:

- **All questions from supervisors and employees should first be directed to the Division/Department HR area**

TO REPORT SYSTEM PROBLEMS (DIVISION/DEPARTMENT HR ONLY):
- pmdp@wisc.edu

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