
PMDP

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM

Division & Department HR Administrative Training



Talent Recruitment and Engagement

OFFICE OF HUMAN RESOURCES
UNIVERSITY OF WISCONSIN-MADISON

DIVISION & DEPARTMENT HR ADMINISTRATION
Version 4.0 | Updated July 23, 2019

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Table of Contents

PMDP INTRODUCTION	3
Purpose.....	3
Learning Outcomes	3
SYSTEM ACCESS AND PERMISSIONS	4
Permission Groups	5
Assigning Indirect Supervisor Permission	6
Removing Indirect Supervisor Permission	8
HR ADMINISTRATOR DASHBOARDS	10
HR Admin Tab.....	10
Email Communications.....	12
Email Communication Types.....	14
Tour Employee Details	15
HR NEEDING CREATION TAB	17
Initial Department/Division Set Up	17
CHANGE SUPERVISOR TAB	19
CLOSING AND RE-OPENING AN EVALUATION	20
Closing an Evaluation	20
Re-opening an Evaluation.....	21
ATTACHING A DOCUMENT	22
ACKNOWLEDGING ON BEHALF OF EMPLOYEE	23
LOG: HISTORY AND COMMENT TRACKER	24
SAMPLE EMAIL COMMUNICATIONS	25
REMINDERS	28
REPORTS	28
QUESTIONS	28

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) provides UW–Madison with a centralized system for tracking and documenting these actions, providing the campus with greater consistency in how performance management is recorded.

PURPOSE

The purpose of this guide 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
- Perform 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



Login

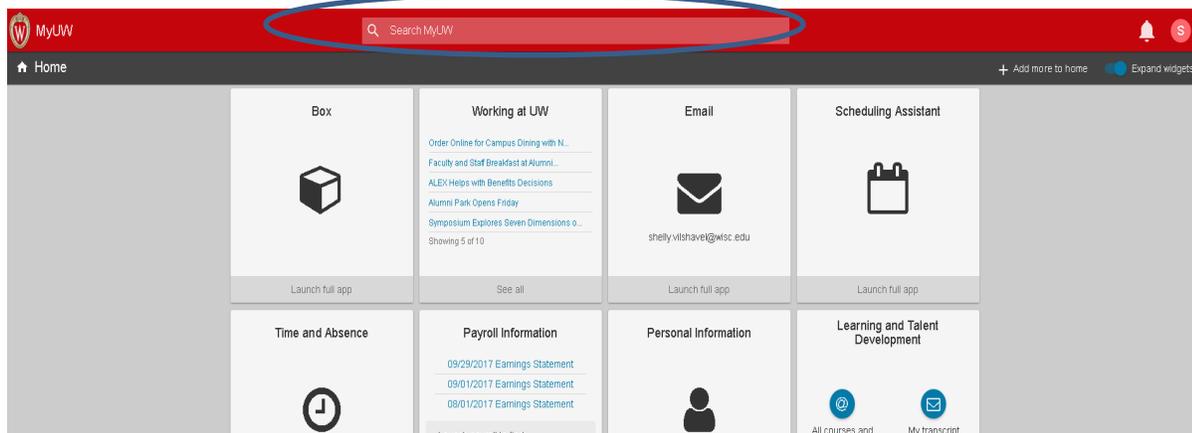
NetID [Forgot NetID](#)

Password [Forgot password](#)

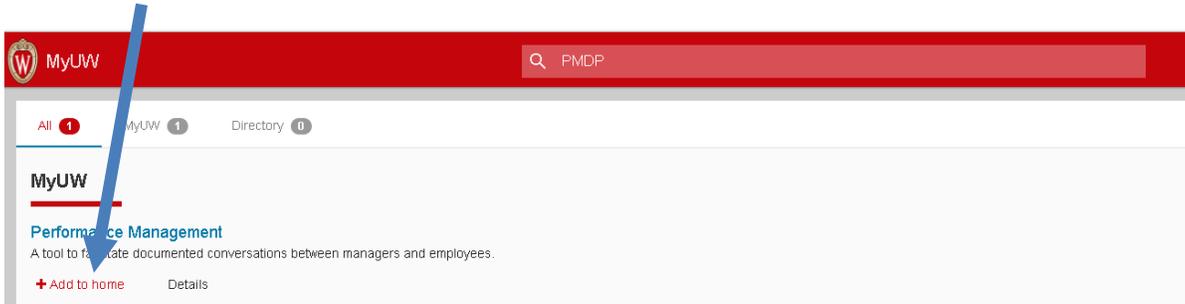
Login

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:

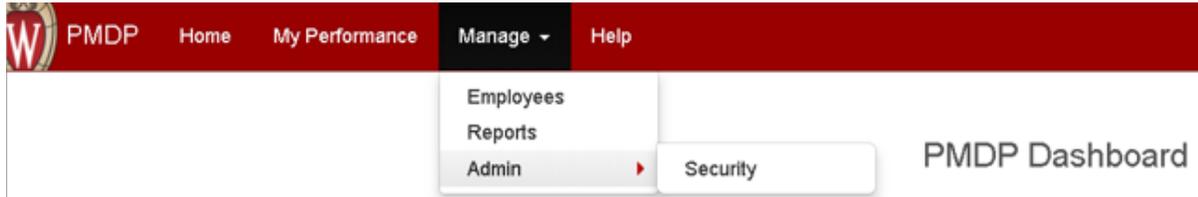
Permission Group	Description
Employee	Access to the employee’s performance activities only. Additionally, all performance activities completed for the employee within PMDP will be available to the employee within PMDP on demand (24/7) through the website and MyUW portal.
Supervisor	Has access to performance 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.
Department HR	Has access to view and maintain HR performance activity functions for the employees/supervisors within their assigned departments (by UDDS). 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 staff are the only users in this permission group. This allows full access to configure and troubleshoot the system.



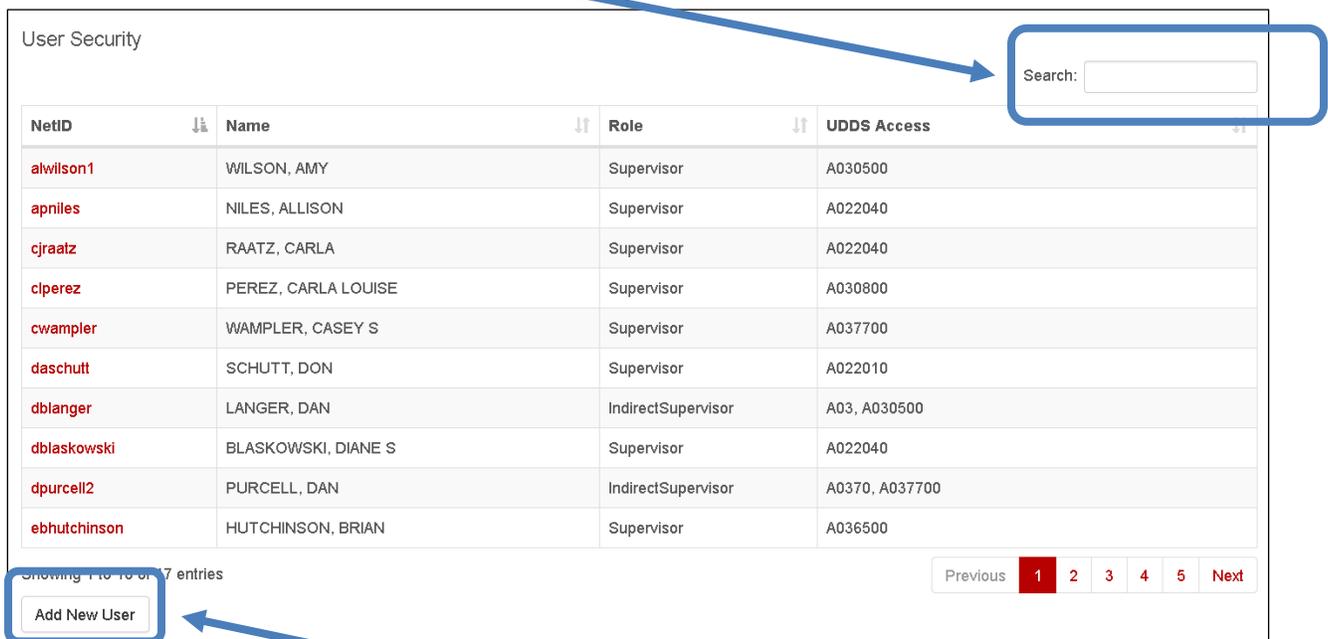
PERMISSION GROUPS: ASSIGNING INDIRECT SUPERVISOR PERMISSION

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.



NetID	Name	Role	UDDS Access
alwilson1	WILSON, AMY	Supervisor	A030500
apniles	NILES, ALLISON	Supervisor	A022040
cjsraatz	RAATZ, CARLA	Supervisor	A022040
clperez	PEREZ, CARLA LOUISE	Supervisor	A030800
cwampler	WAMPLER, CASEY S	Supervisor	A037700
daschutt	SCHUTT, DON	Supervisor	A022010
dblanger	LANGER, DAN	IndirectSupervisor	A03, A030500
dblaskowski	BLASKOWSKI, DIANE S	Supervisor	A022040
dpurcell2	PURCELL, DAN	IndirectSupervisor	A0370, A037700
ebhutchinson	HUTCHINSON, BRIAN	Supervisor	A036500

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

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

The screenshot shows a form for adding a user. The fields are as follows:

- Name:** HUTCHINSON, BRIAN
- NetID:** ebhutchinson
- Role:** IndirectSupervisor
- Email:** brian.hutchinson@wisconsin.gov
- UDDS Access:** A list with one entry: A036500. An "Add" button is next to the list.
- Comments:** A text area with a "4000 characters remaining" indicator and a "This field is required" message.

Callouts and instructions:

- 1. Choose Indirect Supervisor from Role Choices:** Points to the Role dropdown menu.
- 2. Enter specific UDDS and click Add:** Points to the UDDS Access list and the Add button.
- 3. Enter comments – name or initials and date:** Points to the Comments text area.
- 4. Click Save User on bottom right of screen:** Points to the Save User button.

Buttons: Cancel, Save User

PERMISSION GROUPS: REMOVING INDIRECT SUPERVISOR PERMISSION

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



Search by last name for the employee in the Search field.

The screenshot shows the 'User Security' page. A search field is highlighted with a blue box and an arrow pointing to it. Below the search field is a table with columns: NetID, Name, Role, and UDDS Access. The table lists several users, including 'ebhutchinson' who is highlighted in red. Below the table is a pagination control showing 'Showing 1 to 10 of 47 entries' and a 'Previous' button followed by page numbers 1, 2, 3, 4, 5, and a 'Next' button.

NetID	Name	Role	UDDS Access
alwilson1	WILSON, AMY	Supervisor	A030500
apniles	NILES, ALLISON	Supervisor	A022040
cjraatz	RAATZ, CARLA	Supervisor	A022040
cliperez	PEREZ, CARLA LOUISE	Supervisor	A030800
cwampler	WAMPLER, CASEY S	Supervisor	A037700
daschutt	SCHUTT, DON	Supervisor	A022010
dblanger	LANGER, DAN	IndirectSupervisor	A03, A030500
dblaskowski	BLASKOWSKI, DIANE S	Supervisor	A022040
dpurcell2	PURCELL, DAN	IndirectSupervisor	A0370, A037700
ebhutchinson	HUTCHINSON, BRIAN	Supervisor	A036500

Click delete

The screenshot shows the 'User Security' table. The row for 'ebhutchinson' is highlighted in red. A blue box highlights the 'Delete' button in the rightmost column of the row, with an arrow pointing to it.

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

The screenshot shows a confirmation dialog box. The dialog box contains the text 'Delete this record?' and 'Are you sure you want to delete this user?'. There are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is highlighted with a blue box and an arrow pointing to it.

HR AMIN DASHBOARD

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



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.

The screenshot shows the 'HR Admin' tab interface. At the top, there are four tabs: 'HR Admin', 'Performance Management', 'Needing Creation', and 'Changed Supervisors'. Below the tabs, the text reads 'Performance evaluation statistics based on UDDS.' and there is a search box. A table displays performance statistics for various UDDS. A blue circle highlights the 'UDDS' column, and a blue arrow points from it to a 'Supervisor Details' pop-up window.

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	Number of Employees	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

Navigation: 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 Details

Search:

Supervisor	Number of Employees	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

Employee Details

Search:

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

Showing 1 to 1 of 1 entries

Previous **1** Next

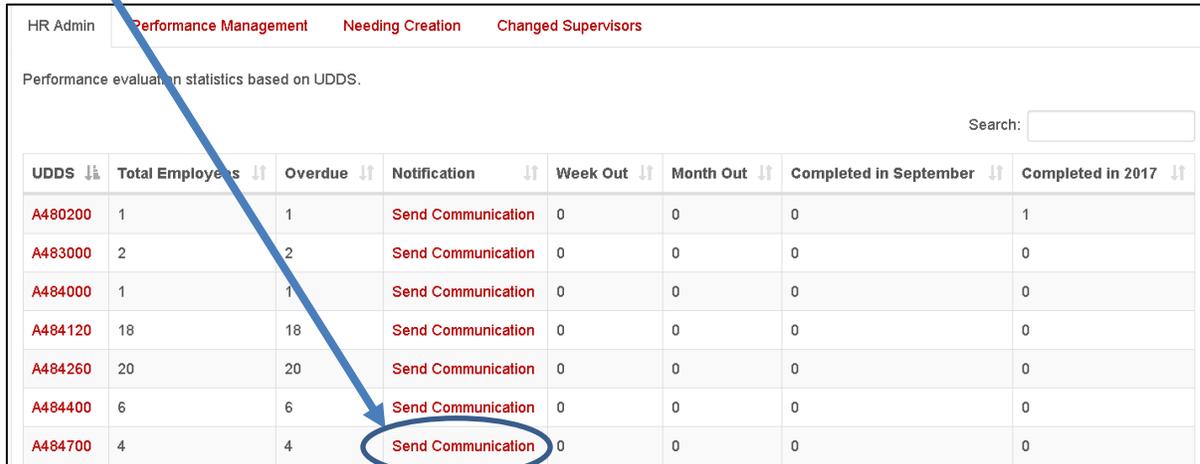


HR AMIN TAB – EMAIL COMMUNICATIONS:

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.



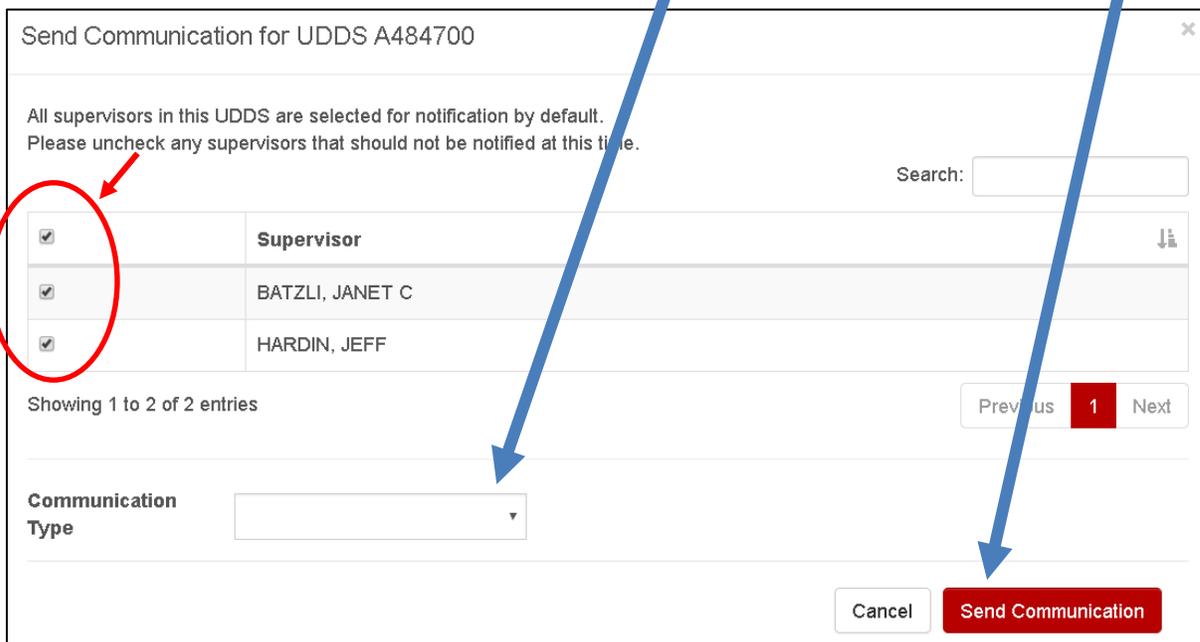
HR Admin Performance Management Needing Creation Changed Supervisors

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

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:

<input checked="" type="checkbox"/>	Supervisor
<input checked="" type="checkbox"/>	BATZLI, JANET C
<input checked="" type="checkbox"/>	HARDIN, JEFF

Showing 1 to 2 of 2 entries

Previous 1 Next

Communication Type

Cancel Send Communication

HR AMIN TAB – EMAIL COMMUNICATIONS:

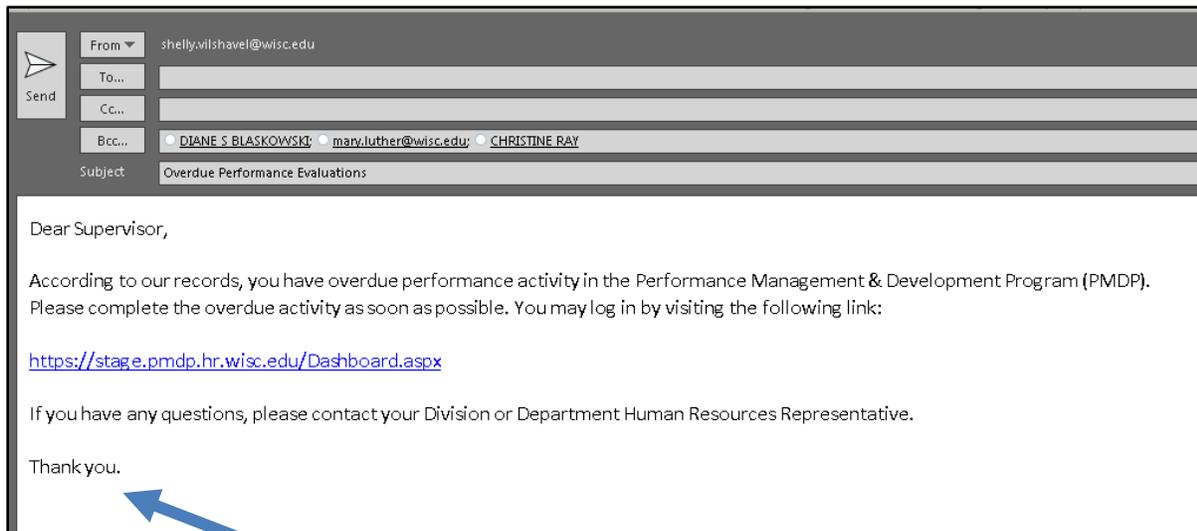
The communication types are:

- 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 therefore 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.



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)

Send 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	EmpID	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 ▶ Next

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

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

[Back to Employee Details](#)

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

[Back to Performance List](#)

Performance Evaluation

Employee EmpID 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 *

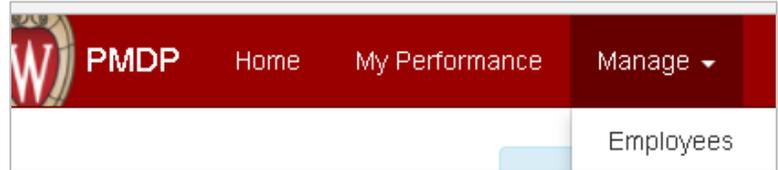
Evaluation Period Start Date *

Evaluation Period End Date *

TOUR THE EMPLOYEE DETAILS



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



Employees

Add, View, or Update PMDP Employees

Search Employee

Name

UDDS

EmplID

Position Number

PMDP Employee Status

PMDP Position Status

Start Date

Probation End Date

Employee Type

Probation Period

Supervisor

Performance Review

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

Employees

Add, View, or Update PMDP Employees

Search Employee

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

Probation End Date

Employee Type

Probation Period

Supervisor

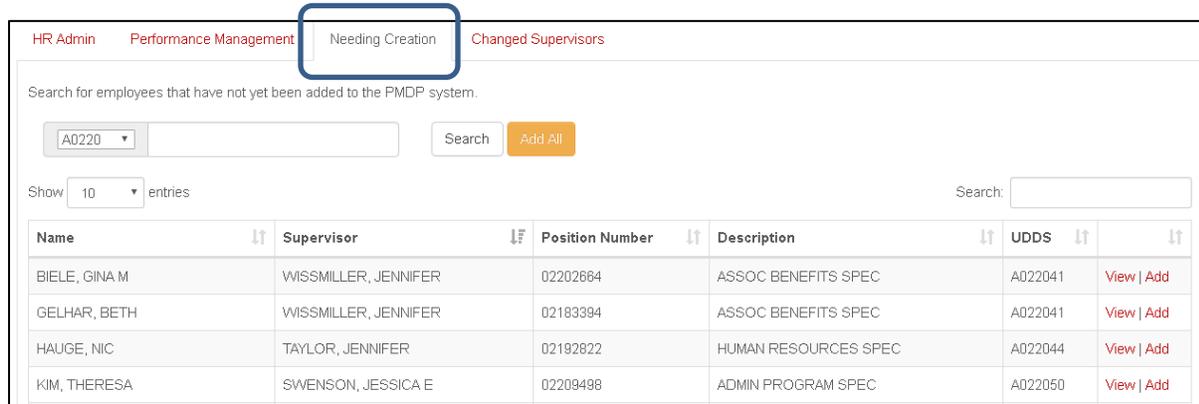
Performance Review [Performance Evaluation History](#)

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



HR Admin Performance Management **Needing Creation** Changed Supervisors

Search for employees that have not yet been added to the PMDP system.

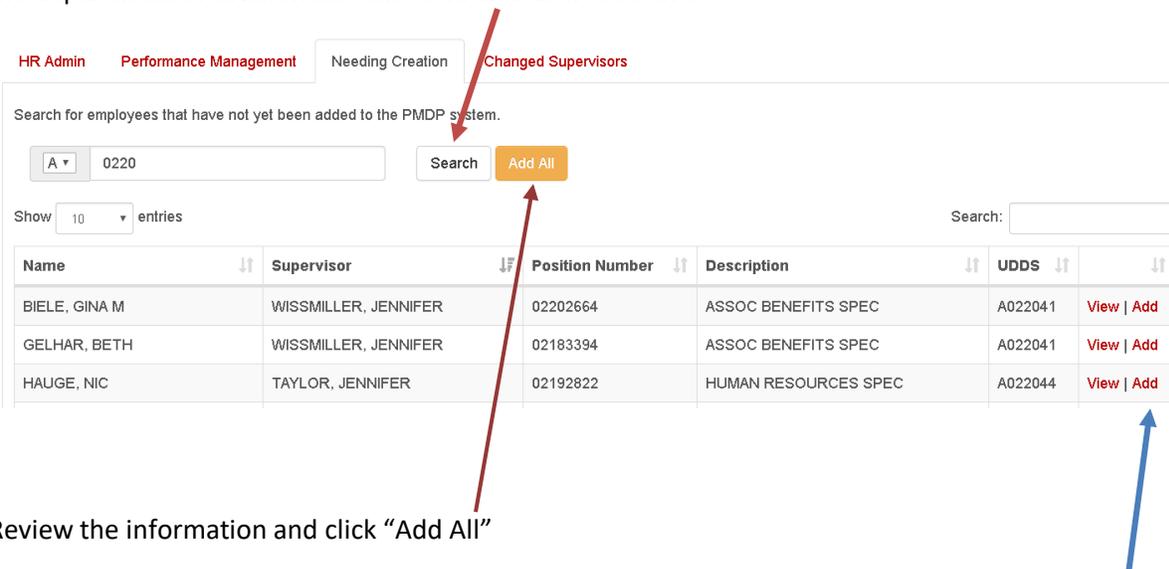
A0220 Search Add All

Show 10 entries Search:

Name	Supervisor	Position Number	Description	UDDS	
BIELE, GINA M	WISSMILLER, JENNIFER	02202664	ASSOC BENEFITS SPEC	A022041	View Add
GELHAR, BETH	WISSMILLER, JENNIFER	02183394	ASSOC BENEFITS SPEC	A022041	View Add
HAUGE, NIC	TAYLOR, JENNIFER	02192822	HUMAN RESOURCES SPEC	A022044	View Add
KIM, THERESA	SWENSON, JESSICA E	02209498	ADMIN PROGRAM SPEC	A022050	View Add

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".



HR Admin Performance Management **Needing Creation** Changed Supervisors

Search for employees that have not yet been added to the PMDP system.

A 0220 Search Add All

Show 10 entries Search:

Name	Supervisor	Position Number	Description	UDDS	
BIELE, GINA M	WISSMILLER, JENNIFER	02202664	ASSOC BENEFITS SPEC	A022041	View Add
GELHAR, BETH	WISSMILLER, JENNIFER	02183394	ASSOC BENEFITS SPEC	A022041	View Add
HAUGE, NIC	TAYLOR, JENNIFER	02192822	HUMAN RESOURCES SPEC	A022044	View Add

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.

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	A0228	View
--------------------	--	----------	------------------	-------	----------------------

Employee

Search

EmpID 00603936

Name DAUSCHMIDT, CARL E

Nickname

Position Number ...

Start Date

Probation End Date

Employee Type

Probation Period ?

Supervisor ...

Performance Review

Click ... next to Supervisor

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

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

Showing 1 to 10 of 412 entries **1** ...

Add New Supervisor

Supervisor

MATHER, KATHRYN JEAN ([Undefined])

Select the appropriate supervisor

Employees

Add, View, or Update PMDP Employees

Search Employee

Name DAUSCHMIDT, CARL

UDDS A022011

EmpID 00603936

Position Number 02134548

PMDP Employee Status ✓ -- Exists in PMDP System.

PMDP Position Status ✓ -- Exists in PMDP System.

Start Date

Probation End Date

Employee Type

Probation Period

Supervisor

Performance Review [Performance Evaluation History](#)

Click Save Update



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.

- Verify 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

EmpID 00300546

Name RIELLY, JULIA B

Nickname

Position Number ...

Start Date

Probation End Date

Employee Type ▼

Probation Period ▼ ⓘ

Supervisor ...

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

A screenshot of a web application interface showing a 'Performance Evaluation' record. The record details include: Employee EmplID: 00231029, Employee Name: SWENSON, JESSICA E, Evaluation Type: Thirty Day Conversation, and Evaluation Status: Waiting on Supervisor. A red box highlights a 'Close Eval' button on the right side of the record. Below the record are several tabs: 'General' (selected), 'Expectations', 'Goals', 'Attachments', 'Overall Rating', and 'Status'. A red arrow points from the 'Click Close Eval' step in the list above to the 'Close Eval' button.A screenshot of a dialog box titled 'Human Resources Closing Evaluation'. It contains a radio button selected for 'Human Resources is closing this evaluation. (Please add comments below.)'. Below this is a text area labeled 'Comments'. At the bottom right of the dialog is a red button labeled 'Close Evaluation'. A red arrow points from the 'Comments' text area to the callout box on the right.

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

General Expectations Goals Attachments Overall Rating

Re-Open Eval

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). Attachment 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	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

Supervisor Attachment Sample Summary Performance Evaluation 2.17.pdf

Employee Attachment Final Midpoint Conversation 3.17.pdf

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

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

Performance Evaluation Back to Performance List

Employee EmplID: 00873914
Employee Name: DZYUBA, MEGAN AILEEN
Evaluation Type: Midpoint Conversation
Evaluation Status: Waiting on Employee Acknowledgement Employee Acknowledgement

General Expectations Goals 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.

1 Manager Content
1 Employee Content
2 Finalize Evaluation
3 Employee Acknowledgement

Evaluation Status: The evaluation has been finalized, but the employee still needs to sign the evaluation with an acknowledgement.

Expectations: All items complete.

Goals: All items complete.

Overall Rating: All items complete.

Click on Employee Acknowledgement

Employee Acknowledgement ×

Human Resources acknowledging evaluation for employee. (Please add comments below.)

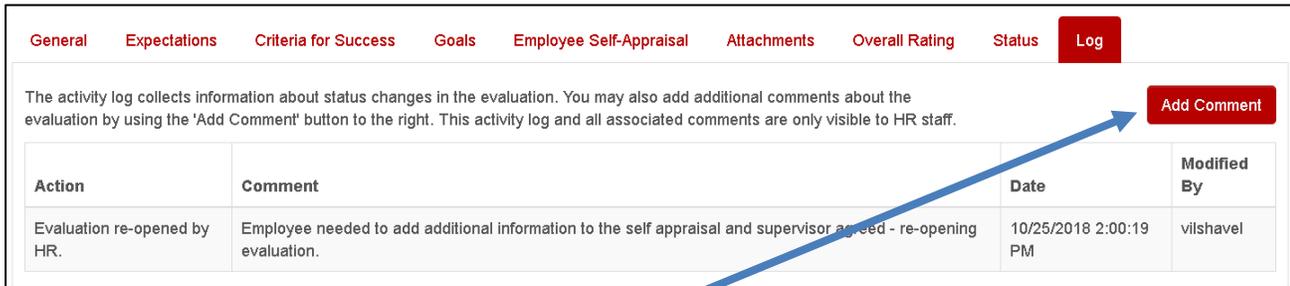
Comments

Type in comments and click acknowledge

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**

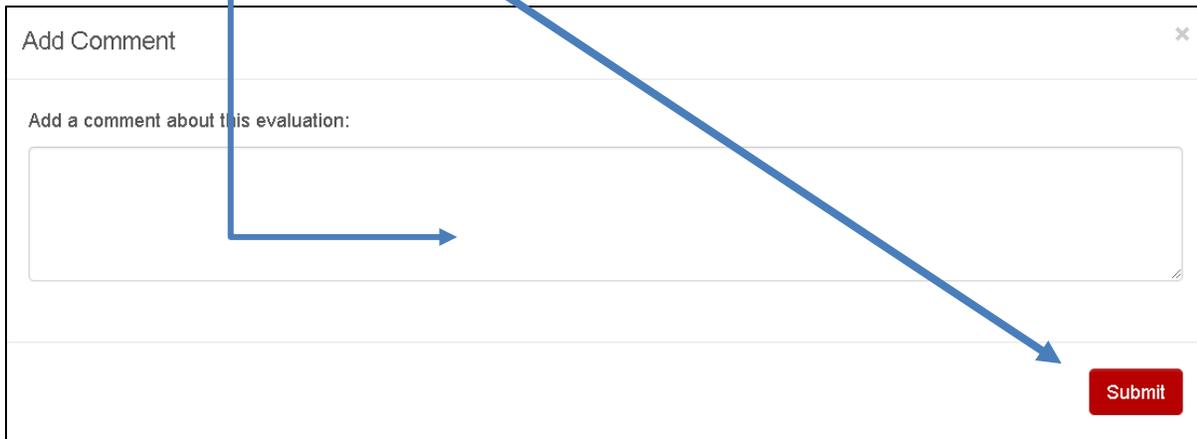
The activity log collects information about status changes in the evaluation. You may also add additional comments about the evaluation by using the 'Add Comment' button to the right. This activity log and all associated comments are only visible to HR staff.

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



SAMPLE EMAIL COMMUNICATIONS

Performance Activity Ready to View	Supervisor Complete
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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.

Performance Evaluation Complete	Employee Acknowledgement
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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.

Employee Acknowledgement	Evaluation Complete
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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.

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.

IMPORTANT REMINDERS:

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

REPORTS:

PMDP administrators can generate a report to review performance activities within a specified date range. Instructions for creating and interpreting the report can be found at:

- <https://hr.wisc.edu/docs/pmdp/performance-activity-report-job-aid.pdf>

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

Christine Ray

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Talent Recruitment and Engagement

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