## **Summary Probation Evaluation – Job Aid**



## HOW TO: COMPLETE A SUMMARY PROBATION EVALUATION



A documented Summary Probation Evaluation is required upon completion of a new employee's probationary period. See the Performance Management Policy at <u>https://kb.wisc.edu/ohr/policies/page.php?id=49583</u>. Consult with your school/college/division/department human resources to determine the summary timing.

Supervisor Action	Employee Action
<ol> <li>Supervisor logs into PMDP with NetID. (Available at pmdp.hr.wisc.edu or by adding the PMDP widget to your MyUW portal.)</li> </ol>	1. No action required.
2. Start the evaluation by clicking either the EmplID or Start Evaluation.  PMDP Dashboard  Performance Management  Performance evaluation information for employees assigned as your direct reports.  Search  Name  I EmpliD  Previous Evaluation  Current Evaluation  Current Evaluation  Starts  St	2. No action required.
SIMONSON, RACHEL       00556409       Mid Probation Conversation       3/12/2018       Start Evaluation         3. Select Create New. Select Summary Probation Evaluation and Create.            Performance Evaluation History         Rame SINONSON, RACHEL         Name SINONSON,	<ol> <li>Employee receives email indicating an evaluation has been started. Log in to PMDP with your NetID. (Available from link in email or at pmdp.hr.wisc.edu or by adding the PMDP widget to your MyUW portal.) You may complete your self-appraisal. Self-appraisal is only included in summary evaluations.</li> </ol>



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Supervisor Action	Employee Action
<ol> <li>Evaluation Period Start Date will reflect the start date in HRS – no change needed. Evaluation Period End Date will reflect the probation end date in HRS – no change needed. Click Save &amp; Next.</li> </ol>	<ol> <li>Complete your self-appraisal. You do not have to complete all at once. You can log back in at any time. Your supervisor cannot view your answers until you Allow Supervisor View. Click Save.</li> </ol>
Performance Evaluation       Back to Performance List         Employee EmpliD       00596409         Employee Vinit       G SERVIH/UMAN RESOURCES SPEC         Evaluation Type       Summary Probation Evaluation (3/1/2017 - 3/1/2016)         Evaluation Status       Walling on Supervisor         Ceneral       Expectations         Criteria for Success       Goals         Attachments       Overall Rating         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.	Performance Evaluation     Back to Performance List       Employee Employ     00056409       Employee Vanie     SIMONSON, RACHEL       Employee Vanit     G SERV/HUMAN RESOURCES SPEC       Evaluation Type     Summary Probation Evaluation (3/1/2017 - 2/28/2018)       Evaluation Status     Walling on Supervisor       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.
Supervisor Tyler Wood Evaluation Type * Summary Probation Evaluation Evaluation Period Start Date * 03/01/2017. Evaluation Period End Date * 02/20/2019. Save & Next	Question         Answer           Outside of the 2017-2019 strategic plan, list the goals you would like to work on for the next evaluation period if any.         Image: Comparison of the compariso
5. Expectations carry forward from the Mid Probation Conversation. Update if needed and <b>indicate rating</b> for each. Click <b>Save &amp; Next</b> .	<ol> <li>Add attachment if desired. When you have completed the Self-Appraisal and added an attachment (if desired) click <b>Allow Supervisor View</b>.</li> <li>Allow Supervisor View</li> </ol>
<ol> <li>Supervisor receives email notification when employee allows supervisor view. The Employee Self-Appraisal tab will now be visible to you. You cannot change any information the employee has entered.</li> </ol>	6. No action required.
<ol> <li>Criteria for Success is a section that only appears on summary evaluations.</li> <li>Indicate current rating for each. Click Save &amp; Next.</li> </ol>	7. No action required.



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Supervisor Action	Employee Action
<ol> <li>Goals carry forward. Note progress on current goal(s) and rate each. Click Add Row and indicate at least one Future Goal. (This may be a current goal that is copied and moved to a future goal.) Click Save &amp; Next.</li> </ol>	8. No action required.
Current       Complete systems (TREMS, JELMS CHIRIS/PVL, JEMS HIRE, HRS) trainings.       Has completed JEMS CHIRIS/PVL and has started others.       Unable to Rate/Not Rated       Making great progress.       Delete         933 characters remaining       933 characters remaining       948 characters remaining       3978 characters remaining       Delete         Future       Complete remainder of trainings.       000 characters remaining       000 characters remaining       Delete         968 characters remaining       1000 characters remaining       000 characters remaining       Save & Mext	
9. Upload attachment if needed. Click Save & Next.	9. No action required.
10. Review Employee Self-Appraisal to prepare for conversation. (If self- appraisal is not there, ask employee to allow supervisor view.)	10. No action required unless supervisor asks you to allow supervisor view.
11. Schedule conversation with employee. When prepared (before, during or after conversation), click <b>Allow Employee View</b> . Employee can view, but cannot edit your information.	11. Employee receives email that supervisor has allowed view. You can review all information and ratings, but can only make changes to the self-appraisal or upload an attachment.
12. Meet with employee and have conversation.	12. Meet with supervisor for conversation.
13. After (or during) conversation, open the evaluation and record the <b>Overall</b> <b>Rating</b> (either Meeting or Not Meeting Expectations) and <b>Conversation</b> <b>Date</b> . Click <b>Save</b> . Click <b>Finalize Evaluation</b> . (Employee has to "Allow Supervisor View" in order to Finalize. An error message will indicate if the employee needs to allow view.)	13. Employee receives email notification that an evaluation has been completed and is waiting for acknowledgement.
14. No action required.	14. Open evaluation, click Employee Acknowledgement. Select Reviewed and AGREE or Reviewed and DISAGREE.
15. Supervisor and HR receive email that evaluation is final/acknowledged.	15. Employee receives email that evaluation is final/acknowledged.
16. END OF PROCESS	16. END OF PROCESS

