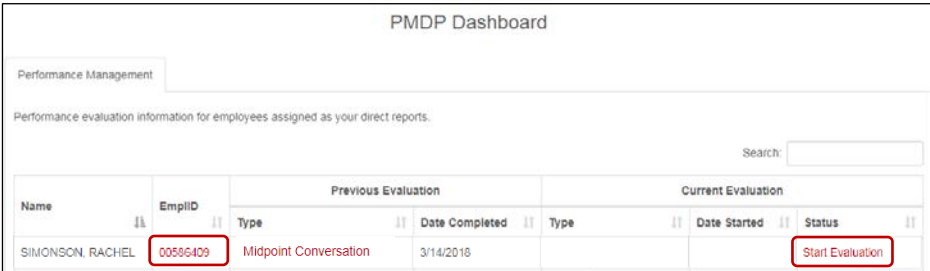



## HOW TO: COMPLETE A SUMMARY EVALUATION



A documented Summary Evaluation is required annually for employees as defined in the Performance Management Policy. See the Performance Management Policy at <https://kb.wisc.edu/ohr/policies/page.php?id=49583>. Cycle timing is determined and communicated by each school/college/division’s performance management program.

Supervisor Action	Employee Action
<p>1. Supervisor logs into PMDP with NetID. (Available at <a href="http://pmdp.hr.wisc.edu">pmdp.hr.wisc.edu</a> or by adding the PMDP widget to your MyUW portal.)</p>	<p>1. No action required.</p>
<p>2. Start the evaluation by clicking either the EmplID or Start Evaluation.</p> 	<p>2. No action required.</p>
<p>3. Select <b>Create New</b>. Select <b>Summary Evaluation</b> and <b>Create</b>.</p> 	<p>3. Employee receives email indicating an evaluation has been started. You can now log in to PMDP with your NetID. (Available from link in email or at <a href="http://pmdp.hr.wisc.edu">pmdp.hr.wisc.edu</a> or by adding the PMDP widget to your MyUW portal.) You may complete your self-appraisal. Self-appraisal is only included in summary evaluations.</p>

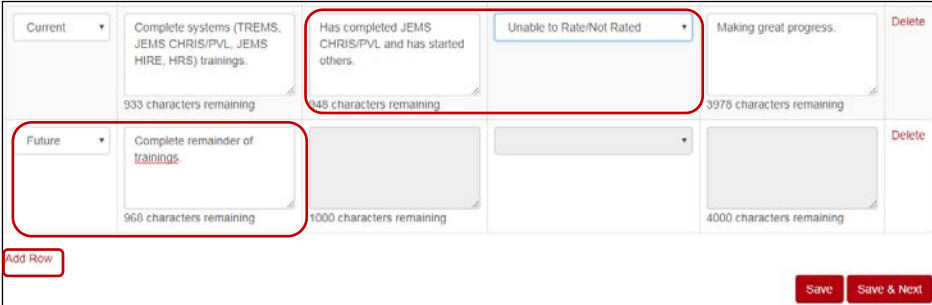

4. Revise the Evaluation Period Start Date and Evaluation Period End Date to reflect the cycle dates that your human resources office has communicated. (Consult with your unit human resources contact to confirm dates.) Click **Save & Next**.

4. 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**.

5. If this is the first evaluation, use Add Row to enter each Job Function and Expectation and **indicate rating**. If these carried forward from a previous evaluation, adjust if needed and **indicate rating**. Click **Save & Next**.

5. Add attachment if desired. When you have completed the Self-Appraisal and added an attachment (if desired) click **Allow Supervisor View**.

[Allow Supervisor View](#)

<p>6. 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.</p>	<p>6. No action required.</p>
<p>7. Criteria for Success is a section that only appears on summary evaluations. <b>Indicate current rating</b> for each. Click <b>Save &amp; Next</b>.</p>	<p>7. No action required.</p>
<p>8. If this is the first evaluation, you will need to add current goals, note progress, and <b>rate each</b>. If the goals carried forward from a previous evaluation, <b>rate each</b> and <b>add at least one Future Goal</b>. (This may be a current goal that is copied and moved to future.) Click <b>Save &amp; Next</b>.</p> 	<p>8. No action required.</p>
<p>9. Upload attachment if needed. Click <b>Save &amp; Next</b>.</p>	<p>9. No action required.</p>
<p>10. Review Employee Self-Appraisal to prepare for conversation. (If self-appraisal is not there, ask employee to allow supervisor view.)</p>	<p>10. No action required unless supervisor asks you to allow supervisor view.</p>
<p>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.</p> 	<p>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.</p>
<p>12. Meet with employee and have conversation.</p>	<p>12. Meet with supervisor for conversation.</p>

13. After (or during) conversation, open the evaluation and record the **Overall Rating** (either Meeting or Not Meeting Expectations) and **Conversation Date**. Click **Save**. Click **Finalize Evaluation**. (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 and click **Employee Acknowledgement** and select **Reviewed and AGREE** or **Reviewed and DISAGREE**.



15. Supervisor and Human Resources receive email that evaluation is final and acknowledged.

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16. END OF PROCESS

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