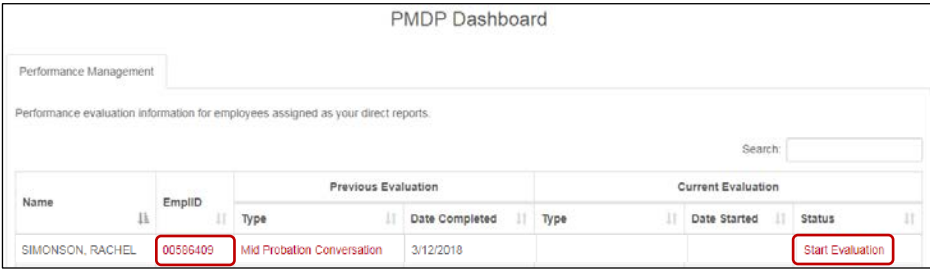
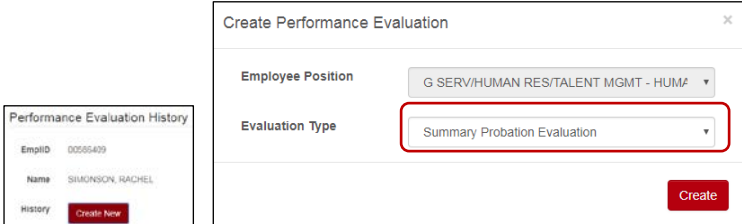


Summary Probation Evaluation – Job Aid

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 <https://kb.wisc.edu/ohr/policies/page.php?id=49583>. Consult with your school/college/division/department human resources to determine the summary timing.

Supervisor Action	Employee Action
<p>1. Supervisor logs into PMDP with NetID. (Available at pmdp.hr.wisc.edu 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 Create New. Select Summary Probation Evaluation and Create.</p> 	<p>3. 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.</p>

4. Revise the Evaluation Period Start Date and Evaluation Period End Date to reflect the employee start date to probation end date. (Consult with your unit human resources contact to confirm dates.) Click **Save & Next**.

5. Expectations carry forward from the Mid Probation Conversation. Update if needed and **indicate rating** for each. Click **Save & Next**.

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.

7. Criteria for Success is a section that only appears on summary evaluations. **Indicate current rating** for each. Click **Save & Next**.

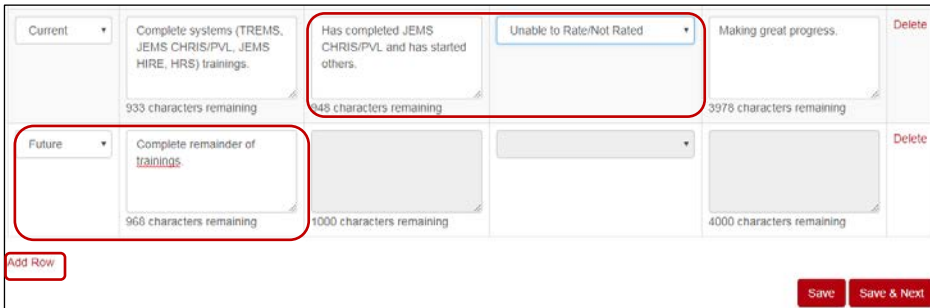
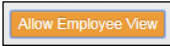
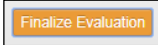

4. Complete your self-appraisal. You do not have to complete all at once. You can log back in at any time. Your supervisor cannot view your answers until you Allow Supervisor View. Click **Save**.

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

[Allow Supervisor View](#)

6. No action required.

7. No action required.

<p>8. 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 & Next.</p> 	<p>8. No action required.</p>
<p>9. Upload attachment if needed. Click Save & Next.</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 Allow Employee View. 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>
<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.)</p> 	<p>13. Employee receives email notification that an evaluation has been completed and is waiting for acknowledgement.</p>
<p>14. No action required.</p>	<p>14. Open evaluation and click Employee Acknowledgement and select Reviewed and AGREE or Reviewed and DISAGREE.</p> 
<p>15. Supervisor and HR receive email that evaluation is final/acknowledged.</p>	<p>15. Employee receives email that evaluation is final/acknowledged.</p>
<p>16. END OF PROCESS</p>	<p>16. END OF PROCESS</p>