

HOW TO: COMPLETE A MID PROBATION CONVERSATION



A documented Mid Probation Conversation is required midway through 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 midpoint timing.

Supervisor Action	Employee Action																		
1. Supervisor logs into PMDP with NetID. (Available at pmdp.hr.wisc.edu or by adding the PMDP widget to your MyUW portal.)	1. No action required.																		
2. Start the evaluation by clicking either the EmplID or Start Evaluation. <div data-bbox="110 604 1047 877" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">PMDP Dashboard</p> <p>Performance Management</p> <p>Performance evaluation information for employees assigned as your direct reports.</p> <p style="text-align: right;">Search: <input type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>EmplID</th> <th>Previous Evaluation</th> <th>Current Evaluation</th> </tr> <tr> <th></th> <th></th> <th>Type</th> <th>Date Completed</th> <th>Type</th> <th>Date Started</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>SIMONSON, RACHEL</td> <td style="border: 2px solid red;">00596409</td> <td>Thirty Day Conversation</td> <td>3/12/2018</td> <td></td> <td></td> <td style="border: 2px solid red;">Start Evaluation</td> </tr> </tbody> </table> </div>	Name	EmplID	Previous Evaluation	Current Evaluation			Type	Date Completed	Type	Date Started	Status	SIMONSON, RACHEL	00596409	Thirty Day Conversation	3/12/2018			Start Evaluation	2. No action required.
Name	EmplID	Previous Evaluation	Current Evaluation																
		Type	Date Completed	Type	Date Started	Status													
SIMONSON, RACHEL	00596409	Thirty Day Conversation	3/12/2018			Start Evaluation													
3. Select Create New . Select Mid Probation Conversation and Create . <div data-bbox="243 955 966 1176" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 2px;"> <p>Performance Evaluation History</p> <p>EmplID: 00596409</p> <p>Name: SIMONSON, RACHEL</p> <p>History Create New</p> </div> <div style="border: 1px solid black; padding: 5px; flex-grow: 1;"> <p style="text-align: center;">Create Performance Evaluation</p> <p>Employee Position: G SERV/HUMAN RES/TALENT MGMT - HUMA</p> <p>Evaluation Type: Mid Probation Conversation</p> <p style="text-align: right;">Create</p> </div> </div> </div>	3. Employee receives email indicating an evaluation has been started for them. No action required.																		
4. 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 minus half – no change needed. Click Save & Next . <div data-bbox="110 1333 1047 1837" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Performance Evaluation Back to Performance List</p> <p>Employee EmplID: 00596409</p> <p>Employee Name: SIMONSON, RACHEL</p> <p>Employee Unit: G SERV/HUMAN RES/TALENT MGMT - HUMAN RESOURCES SPEC</p> <p>Evaluation Type: Mid Probation Conversation (3/31/2018 - 3/12/2018)</p> <p>Evaluation Status: Waiting on Supervisor Allow Employee View</p> <hr/> <p>General Expectations Goals Attachments Overall Rating Status</p> <p>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.</p> <p>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.</p> <p>Supervisor: Tyler Wood</p> <p>Evaluation Type: Mid Probation Conversation</p> <div style="border: 2px solid red; padding: 5px; display: inline-block;"> <p>Evaluation Period Start Date: 03/01/2018</p> <p>Evaluation Period End Date: 06/01/2018</p> </div> <div style="border: 2px solid red; padding: 5px; display: inline-block; margin-left: 10px;"> <p>Dates will reflect start date and probation end date minus half. No change needed.</p> </div> <p style="text-align: right;">Save Save & Next</p> </div>	4. No action required.																		

Supervisor Action	Employee Action
5. Expectations carry forward from the Thirty Day Conversation. Update if needed and indicate rating for each expectation. Click Save & Next .	5. No action required.
6. Goals carry forward from the Thirty Day Conversation. 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 . <div data-bbox="110 506 1045 814" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div>	6. No action required.
7. Upload attachment if needed. Click Save & Next .	7. No action required.
8. Schedule conversation with employee. When prepared (either before, during or after the in-person conversation), click Allow Employee View on the evaluation. Employee can view all information currently in the evaluation and can upload an attachment, but cannot edit information that you have entered. <div data-bbox="873 1024 1040 1066" style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 5px 0;"> Allow Employee View </div>	8. Employee receives email that supervisor allowed view. Log in to PMDP with NetID. (Use email link, pmdp.hr.wisc.edu or add PMDP widget to MyUW portal.)
9. No action required.	9. Review information, upload attachment if desired, click Allow Supervisor View . <div data-bbox="1211 1213 1382 1255" style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 5px 0;"> Allow Supervisor View </div>
10. Meet with employee and have conversation.	10. Meet for conversation.
11. 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.) <div data-bbox="889 1478 1044 1520" style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 5px 0;"> Finalize Evaluation </div>	11. Employee receives email notification that an evaluation has been completed and is waiting for acknowledgement.
12. No action required.	12. Open evaluation and click Employee Acknowledgement and select Reviewed and AGREE or Reviewed and DISAGREE . <div data-bbox="1187 1696 1406 1738" style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 5px 0;"> Employee Acknowledgement </div>
13. Supervisor and Human Resources receive email notification that evaluation is final and acknowledged.	13. Receive email that evaluation is final and acknowledged.
14. END OF PROCESS	14. END OF PROCESS