UNIVERSITY OF WISCONSIN
PARKSIDE

Dear Colleagues:

Thank you for attending the E-Performance training. During the sessions, a number of questions were raised about the existing/old process, as well as the new. Below is information to help clarify some of your questions.

<u>Evaluation Process for the January 1, 2020 – December 31, 2020 Performance Year</u>

Many of you, including your direct reports, have questions about performance evaluations covering last year's performance (January 1 – December 31, 2020 calendar year). We previously discussed modifying the old evaluation documents to accommodate for COVID-19 as many of us were working remotely. After further discussion, we discovered that many of you have either started, and in some cases, completed the performance evaluation for last year, using the old paper/electronic documents. Therefore, we have decided to use the existing performance documents to complete the evaluation process for the January 1, 2020 – December 31, 2020 performance year. Links to the documents are below. Please have your direct reports complete the self-evaluation and return to you for your feedback and evaluation. Remember, you will be evaluating last year's performance and last year's goals. The 2020 evaluation process should be completed no later than May 31, 2021.

[Non-Instructional Academic and University Staff Evaluation Document](#)

[Supervisory Staff Evaluation Document](#)

<u>Evaluation Process for the January 1, 2021 – December 31, 2021 Performance Year</u>

As shared, the new electronic/HRS template will be used to evaluate employee performance next year. Effective March 1, you and your direct reports will be able to log in to the system to set and approve performance goals for this performance year (January 1, 2021 – December 31, 2021). **These goals will be evaluated beginning January 2022 in the new system.**

Below is a list of frequently asked questions presented during the E-Performance training sessions:

<u>Frequently Asked Questions</u>

Are we completing Performance Reviews for 2020?

Yes. We will be using the previous electronic paper format. Please see attached documents for Academic and University Staff and Management. The performance period is 1/1/2020 – 12/31/2020.

When are 2020 evaluations due?

May 31, 2021

Will we continue to conduct 3- or 6-month probationary reviews?

Yes, however, as of today, Shared Services has not developed a probationary template. In the meantime, continue to handle probation evaluations the same way we do today in the paper (word document) format.

Who is excluded from using the new 2021 Electronic Performance System?

Faculty, Instructional Academic Staff, Custodians, Grounds, and Maintenance Staff

Are the Managers lined up correctly with the employees they supervise?

If you have made changes to the reporting structure, please make sure that you submit an Employee Change Form to have the employee record updated. If you have any questions about your direct reports, please email Human Resources at hr@uwp.edu.

If the backup person supervises the employee, will they be completing the e-Performance?

The individual responsible for completing the evaluation is the supervisor ("Reports To") of record. There is only one individual with the title of "Reports To" for each employee/assignment, unless they have multiple assignments (see next question). An employee will not have a back-up "Reports To."

"Reports To" should not be confused with the back-up "Time and Labor" approver. An employee may have more than one back-up "Time and Labor" approver. The back-up "Time and Labor" approver should not complete the evaluation.

Some of the College Advisors have dual reporting relationships. Who does the review?

Each employee has a supervisor of record. The evaluation will be assigned to the supervisor ("Reports To") of record. If an employee has a dual reporting relationship, the supervisor of record will complete the evaluation, with input from the second supervisor. In rare cases, an employee may have two separate, unique assignments, i.e. 60% in HR and 40% in Admissions. In this case, the employee will have two supervisors of record for each assignment and both supervisors will complete an evaluation for the employee. If you have questions about "Reports To" or assignments, please contact hr@uwp.edu.

What if a manager changes in the middle of the year, how do they get access to the individuals review.

Any changes should be submitted to HR via an Employee Change Form as soon as possible. After the change is entered, the system will automatically update and the evaluation form will route to the new supervisor/"Reports To."

Can the Job Description be attached with e-Performance?

With the new Title and Total Compensation (TTC) system, there is no need to attach job descriptions.

Where can we upload certifications, requirements to complete the job.

At the Checkpoint 1 – Development – Growth area/tab (noted below) you will be able to add comments information about required certifications, trainings, professional development sessions, webinars, conferences (internal & external), committees. Note: list dates of attendance

Note: The *Mandatory Training* tab is view-only (for all templates, all institutions) and currently restricted to only display training courses that are mandatory for all employee's system-wide.
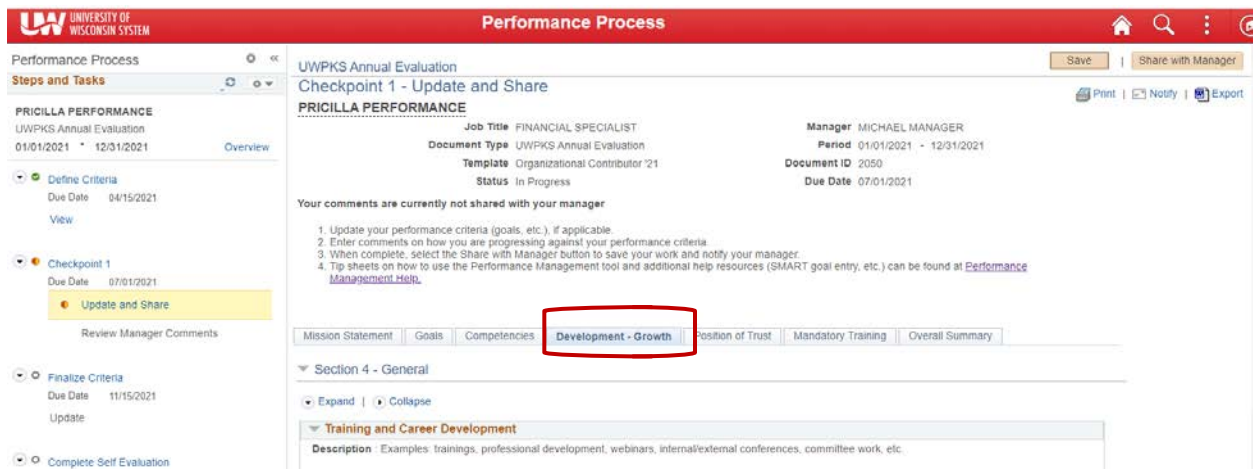
Please refer to the Performance Management Help for clarifications.
- Performance Management Help

Refer to the SMART Goals to write your goals. Located on the HR Website.
- SMART GOALS

If you have any questions about the above information, please do not hesitate to email hr@uwp.edu and we will respond to your questions as soon as possible.

Thank you!

Sheronda Glass
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