



# **e-Performance Training**

**Human Resources**

July 2022

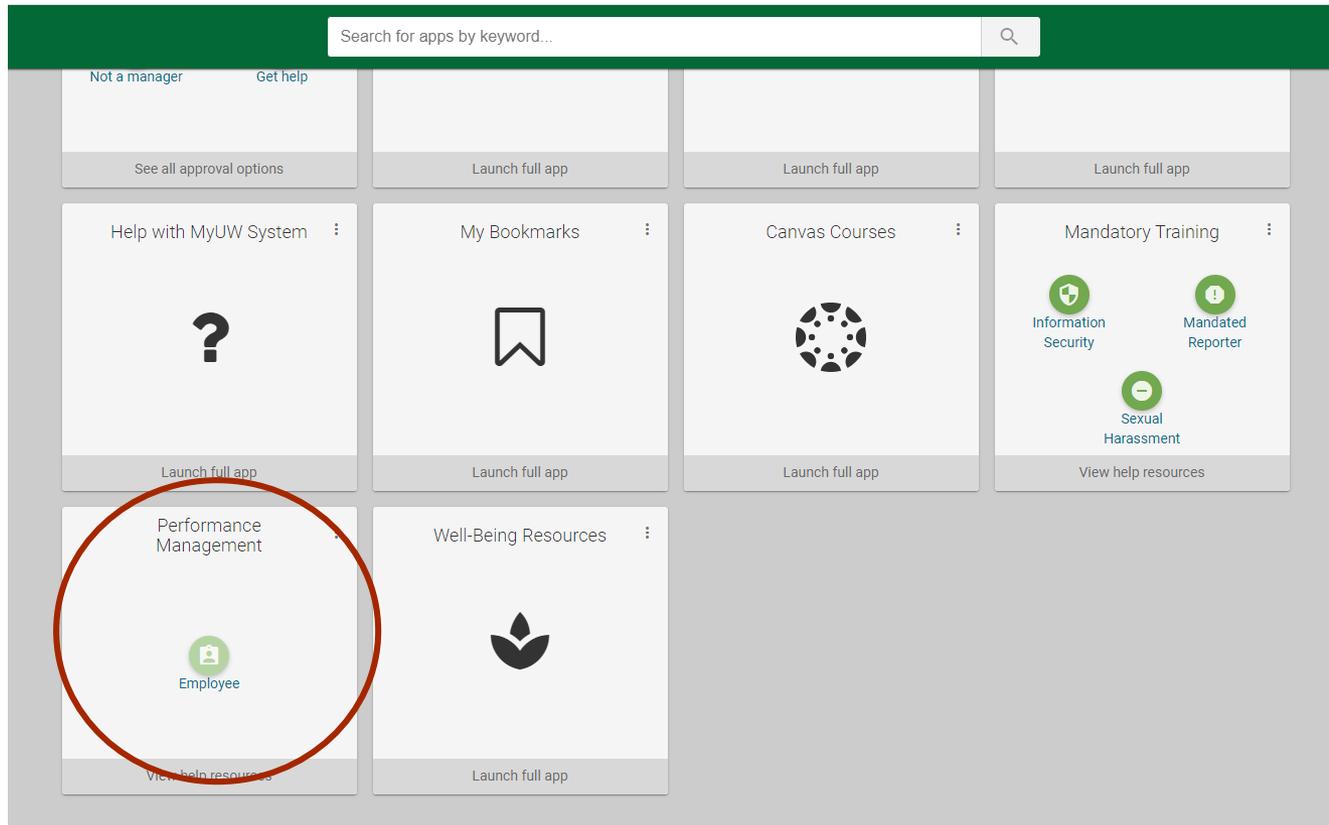
# Timeline for 2022 Performance Reviews

Steps	What do employees and managers do during steps?	How long is the step typically open?	Due Date	Comments
<b>Define Criteria</b>	Employee sets up their SMART Goals	Dec 2022 – April 15, 2022	April 15, 2022	This is the first step of the evaluation process. This step establishes the performance criteria that the employee will be evaluated against.
<b>Checkpoint</b>	Employee add, update goals. Review comments from Manager	April 15, 2022 – July 1, 2022	July 1, 2022	The Checkpoint phase is when the employee and manager meet to discuss performance year-to-date and adjust performance criteria, if needed. Commonly referred to as the “mid-point” meeting.
<b>Finalize Criteria</b>	Add or Edit Goals and finalize	July 1, 2022 – November 15, 2022	November 15, 2022	The Finalize Criteria step is the last opportunity to adjust performance criteria and add comments on performance year to-date.
<b>Self-Evaluation</b>	Employee will rate their Competencies, Add Development/Growth tab, and any documents and/or attachments	November 15, 2022 thru January 15, 2023	January 15, 2023	Completing the Self Evaluation allows employees to provide input and feedback on their performance. Comments, ratings and attachments from a completed Self Evaluation are visible in the Manager Evaluation.
<b>Manager Evaluation</b>	Manager will sit with the employee and share comments, ratings with employee.	January 15, 2023- March 31, 2023	March 31, 2023	The manager will complete the evaluation and share the document with the employee. Once the document has been shared all comments, ratings and attachments can be reviewed.
<b>Acknowledge &amp; Sign</b>				Verify you have reviewed the document with your manager.

[Performance Management Help](#)

# EMPLOYEE – Entering your Goals in Define Criteria status

1. Log in My UW Portal, you will find the Performance Management tile below. Click on the Employee Icon.



## 2. Click on UWPKS Annual Evaluation

Document Type	Document Status	Period Begin / Period End	Next Due Date
UWPKS Annual Evaluation	Define Criteria	01/01/2021 12/31/2021	04/15/2021 >

### 3. Employee will see this.

**Performance Process**

UWPKS Annual Evaluation

Define Criteria - Update

PRICILLA PERFORMANCE

Job Title FINANCIAL SPECIALIST  
Document Type UWPKS Annual Evaluation  
Template Organizational Contributor '21  
Status In Progress

Manager MICHAEL MANAGER  
Period 01/01/2021 - 12/31/2021  
Document ID 2050  
Due Date 04/15/2021

1. Add the performance criteria (goals, etc.) that you plan to accomplish during the performance period, if applicable.  
2. Once you have completed this step, select the Ready for Manager Review button to notify your manager.  
3. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).

Mission Statement | Goals | Competencies | Mandatory Training

Section 1 - Mission Statement

Expand | Collapse

Mission 1: Mission of the University of Wisconsin-Parkside

Description : Our M

Our Vision  
The University of Wis  
diversity, inclusion an  
serving as a focal po

Our Mission  
The University of Wis  
responsive to its dive

To fulfill this mission,  
- Offer high-quality a  
occupational, civic an  
- Generate, dissemi  
region and the world  
- Attract and retain a  
- Foster a teaching a  
excellence.  
- Utilize technology c  
- Prepare students tr

**Mission Statement:** This will not change

**Goals:** You will need to enter your goals

**Competencies:** Will not change

**Mandatory Training:** Shared Services will send you an email to complete.

# S.M.A.R.T. GOALS WORKSHEET

Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information. These are designed to help you succeed, so be positive when answering the questions.

<b>INITIAL GOAL</b>	Write the goal you have in mind
<b>S</b> <b>SPECIFIC</b>	What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
<b>M</b> <b>MEASURABLE</b>	How can you measure progress and know if you've successfully met your goal?
<b>A</b> <b>ACHIEVABLE</b>	Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
<b>R</b> <b>RELEVANT</b>	Why am I setting this goal now? Is it aligned with overall objectives?
<b>T</b> <b>TIME-BOUND</b>	What's the deadline and is it realistic?
<b>SMART GOAL</b>	Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed

**4. Prior to setting up your goals, you should complete this sheet to ensure you are following the SMART rules.**

**SMART Goals  
Development**

## 5. To enter your goals, click on Goals

The screenshot displays the 'Performance Process' interface for a 'UWPKS Annual Evaluation'. The left sidebar shows a 'Steps and Tasks' list with 'Define Criteria' selected and 'Update' highlighted. The main content area shows 'PRICILLA PERFORMANCE' details, including job title, manager, and document information. A red arrow points to the 'Goals' tab in the 'Section 2 - Employee Goals' area, which is circled in red. Below the tabs, there is an 'Add Goal' button and an 'Audit History' section showing a record created by ZACHARY HAAK on 02/01/2021 at 12:19:29PM.

UNIVERSITY OF WISCONSIN SYSTEM Performance Process

Performance Process UWPKS Annual Evaluation Save Ready for Manager Review

Steps and Tasks Define Criteria - Update Print Notify Export

PRICILLA PERFORMANCE

Job Title FINANCIAL SPECIALIST Manager MICHAEL MANAGER

Document Type UWPKS Annual Evaluation Period 01/01/2021 - 12/31/2021

Template Organizational Contributor '21 Document ID 2050

Status In Progress Due Date 04/15/2021

1. Add the performance criteria (goals, etc.) that you plan to accomplish during the performance period, if applicable.  
2. Once you have completed this step, select the Ready for Manager Review button to notify your manager.  
3. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).

Mission Statement **Goals** Competencies Mandatory Training

Section 2 - Employee Goals

Add Goal

Audit History

Created By ZACHARY HAAK 02/01/2021 12:19:29PM

## 5. Enter the Title of your Goal and Description

The screenshot shows the 'Performance Process' interface for 'UWPKS Annual Evaluation'. The main heading is 'Add Your Own Goal'. Below this, there is a form with a '\*Title' field and a 'Description' field. The 'Title' field is circled in red, and a red arrow points to it from the section header above. The 'Description' field has a rich text editor toolbar above it. On the left side, there is a sidebar with a 'Steps and Tasks' section, including 'Define Criteria', 'Checkpoint 1', 'Finalize Criteria', and 'Complete Self Evaluation'. The 'Define Criteria' step is currently active, showing a due date of 04/15/2021 and an 'Update' button.

**NOTE: Enter at least three goals and ensure they follow the SMART goal rule.**

6. To add more goals, click on Add your own Goal and click on

Next

UW UNIVERSITY OF WISCONSIN SYSTEM Performance Process

Performance Process UWPKS Annual Evaluation

Steps and Tasks Add Goal

Select an option to add the new goal.

Add your own Goal

Copy Goal from My Documents

Next

Click Next to move forward

Return

PRICILLA PERFORMANCE  
UWPKS Annual Evaluation  
01/01/2021 - 12/31/2021 Overview

Define Criteria  
Due Date 04/15/2021  
Update

Checkpoint 1  
Due Date 07/01/2021  
Update and Share

# 7. When employee has entered their goals, click on **Save** or **Ready for Manager Review**

Ready for Manager Review

The screenshot displays the 'Performance Process' interface for 'UWPKS Annual Evaluation'. The main header is red with the University of Wisconsin logo and the text 'Performance Process'. Below the header, there are navigation icons and a 'Ready for Manager Review' button circled in red. The left sidebar shows a list of steps: 'Define Criteria' (selected), 'Checkpoint 1', 'Finalize Criteria', 'Complete Self Evaluation', and 'Review Manager Evaluation'. The main content area shows 'Define Criteria - Update' for 'PRICILLA PERFORMANCE'. It includes fields for Job Title (FINANCIAL SPECIALIST), Document Type (UWPKS Annual Evaluation), Template (Organizational Contributor '21), Status (In Progress), Manager (MICHAEL MANAGER), Period (01/01/2021 - 12/31/2021), Document ID (2050), and Due Date (04/15/2021). Below these fields are instructions and a 'Management Help' link. At the bottom, there are tabs for 'Mission Statement', 'Goals', 'Competencies', and 'Mandatory Training'. The 'Goals' tab is active, showing 'Section 2 - Employee Goals' with two goals: 'Goal 1: Trainings for Academic and University Staff' and 'Goal 2: Employee Engagement'. Each goal has a description and a list of tasks.

## 8. The employee will see this. At this time, the Manager is reviewing your goals. The Manager will review and will respond under Manager Comments.

The screenshot displays the 'Performance Process' interface for the University of Wisconsin System. The main header is 'Performance Process' with navigation icons for home, search, and user profile. The left sidebar shows a 'Steps and Tasks' list for 'PRICILLA PERFORMANCE' with the following items:

- Define Criteria (Due Date: 04/15/2021, Update button)
- Checkpoint 1 (Due Date: 07/01/2021, Update and Share, Review Manager Comments)
- Finalize Criteria (Due Date: 11/15/2021, Update)
- Complete Self Evaluation (Due Date: 01/15/2022, Update and Complete)
- Review Manager Evaluation (Due Date: 03/31/2022, Acknowledge, View)

The main content area is titled 'UWPKS Annual Evaluation' and 'Define Criteria - Update'. It includes a 'PRICILLA PERFORMANCE' header and a table of details:

Job Title	FINANCIAL SPECIALIST	Manager	MICHAEL MANAGER
Document Type	UWPKS Annual Evaluation	Period	01/01/2021 - 12/31/2021
Template	Organizational Contributor '21	Document ID	2050
Status	In Progress	Due Date	04/15/2021

A success message states: 'You have successfully saved this document.' Below this are three numbered instructions:

1. Add the performance criteria (goals, etc.) that you plan to accomplish during the performance period, if applicable.
2. Once you have completed this step, select the Ready for Manager Review button to notify your manager.
3. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).

Navigation tabs include 'Mission Statement', 'Goals', 'Competencies', and 'Mandatory Training'. The 'Goals' section is expanded to show 'Section 2 - Employee Goals' with two goals:

- Goal 1: Trainings for Academic and University Staff**  
Description: Schedule Professional Development training for Academic and University Staff.
  - Creating a Customer Service Culture
  - Technology Training 101
- Goal 2: Employee Engagement**  
Description: Update staff on employee engagement events

Metadata for Goal 1 includes: Created By PRICILLA PERFORMANCE, 02/03/2021 10:18AM.

# EMPLOYEE - CHECKPOINT

## 1. Click on UWPKS Annual Evaluation

UW UNIVERSITY OF WISCONSIN SYSTEM Performance

PRICILLA PERFORMANCE  
FINANCIAL SPECIALIST

My Current Documents 1

My Historical Documents

Evaluations of Others 0

Historical Evaluations of Others

Document Type	Document Status	Period Begin / Period End	Next Due Date
UWPKS Annual Evaluation	Track Progress - Checkpoint 1	01/01/2021 12/31/2021	07/01/2021 >

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**

Performance Process

UWPKS Annual Evaluation

Checkpoint 1 - Update and Share

PRICILLA PERFORMANCE

Job Title FINANCIAL SPECIALIST  
Document Type UWPKS Annual Evaluation  
Template Organizational Contributor '21  
Status In Progress

Manager MICHAEL MANAGER  
Period 01/01/2021 - 12/31/2021  
Document ID 2050  
Due Date 07/01/2021

Your comments are currently not shared with your manager

1. Update your performance criteria (goals, etc.), if applicable.
2. Enter comments on how you are progressing against your performance criteria.
3. When complete, select the Share with Manager button to save your work and notify your manager.
4. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).

Mission Statement | Goals | Competencies | **Development - Growth** | Position of Trust | Mandatory Training | Overall Summary

Section 4 - General

Expand | Collapse

Training and Career Development

Description : Examples: trainings, professional development, webinars, internal/external conferences, committee work, etc.

Manager Comments Manager has either not commented or has not shared their comments

Employee Comments

4. The employee will review any comments from the Manager.

5. Once employee reviews, they can save and/or send to Share with Manager

# MANAGEMENT – DEFINE CRITERIA

1. This is the email sent from Shared Services to Managers to view activity in My UW Portal

**From:** UWSystemHR@uwss.wisconsin.edu

**Sent:** Monday, June 22, 2020 3:04 AM

**To:** [manager's business address in Modify a Person]

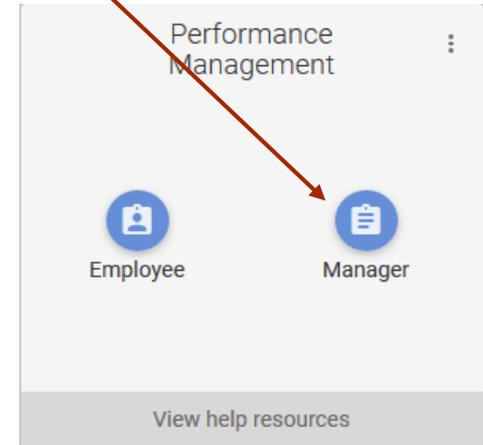
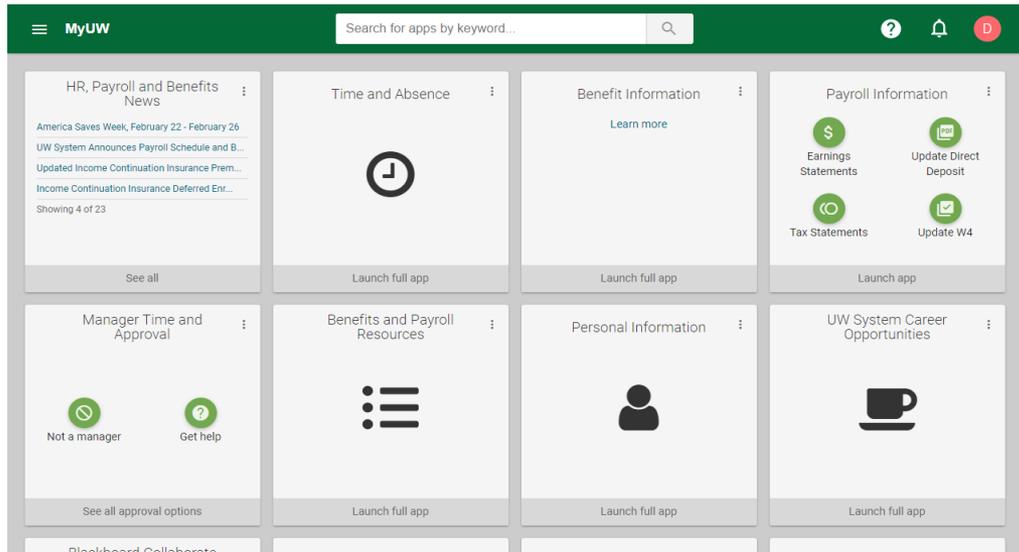
**Subject:** The **Manager Evaluation** step for your employee performance reviews is due soon

[manager's FIRST name]:

The **Manager Evaluation** step for the following employees is due soon:

- [EMPLOYEE NAME] due: 2020-06-26

2. Log in My UW Portal, you will find these tiles below.  
Manager will complete the tile listed here.



### 3. Manager will see a list of their employees. Click on Pricilla Performance.

The screenshot shows a web interface titled "Team Performance". On the left is a sidebar with navigation options: "Current Documents" (highlighted in green), "Delegated Documents", "Historical Documents", "Administrative Tasks", and "View-Only Documents". The main content area is titled "Current Documents" and displays a table with 2 rows. A red arrow points from the top right of the slide to the "PRICILLA PERFORMANCE" row in the table. A red bracket on the right side of the table highlights the two rows.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>PRICILLA PERFORMANCE</b> FINANCIAL SPECIALIST	UWPKS Annual Evaluation	Define Criteria	01/01/2021 12/31/2021	04/15/2021 >
<b>PARKER PERFORMANCE</b> FINANCIAL SPECIALIST	UWPKS Annual Evaluation	Define Criteria	01/01/2021 12/31/2021	04/15/2021 >

## 4. Manager will see Pricilla Performance's Goals

The screenshot displays the 'Performance Process' interface for 'PRICILLA PERFORMANCE'. The main header is 'UW UNIVERSITY OF WISCONSIN SYSTEM Performance Process'. The left sidebar shows a 'Steps and Tasks' list with 'Define Criteria' selected and 'Update and Approve' highlighted. The main content area is titled 'UWPKS Annual Evaluation Define Criteria - Update and Approve' and includes a 'PRICILLA PERFORMANCE' section with 'Actions' and a list of performance criteria. A red bracket highlights the 'Goal 1: Trainings for Academic and University Staff' section, which includes a description and a list of tasks: 'Creating a Customer Service Culture' and 'Technology Training 101'. The interface also shows a 'Mission Statement' tab, 'Section 2 - Employee Goals', and a 'Goal 2: Employee Engagement' section.

**Performance Process**

**UWPKS Annual Evaluation**

**Define Criteria - Update and Approve**

**PRICILLA PERFORMANCE**

Actions

**Job Title** FINANCIAL SPECIALIST  
**Document Type** UWPKS Annual Evaluation  
**Template** Organizational Contributor '21  
**Status** In Progress

**Manager** MICHAEL MANAGER  
**Period** 01/01/2021 - 12/31/2021  
**Document ID** 2050  
**Due Date** 04/15/2021

1. Review the performance criteria (goals, etc.) that the employee plans to accomplish during this performance period.
2. Make any necessary adjustments to the performance criteria and review your changes with the employee.
3. Once the performance criteria is finalized, select the Approve button to complete this step.
4. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).

Mission Statement | **Goals** | Competencies | Mandatory Training

Section 2 - Employee Goals

Expand | Collapse | Add Goal

**Goal 1: Trainings for Academic and University Staff**

**Description** : Schedule Professional Development training for Academic and University Staff.

- Creating a Customer Service Culture
- Technology Training 101

Created By PRICILLA PERFORMANCE 02/03/2021 10:18AM

**Goal 2: Employee Engagement**

**Description** : Update staff on employee engagement events

## 5. If the Manager wants the employee to edit their goals, the Manager will make notes and Release to Employee

The screenshot shows the 'Performance Process' interface for 'UWPKS Annual Evaluation'. The top navigation bar includes 'Save', 'Release to Employee', and 'Approve' buttons. The left sidebar lists performance steps: 'Define Criteria' (due 04/15/2021), 'Checkpoint 1' (due 07/01/2021), 'Finalize Criteria' (due 11/15/2021), 'Review Self Evaluation' (due 01/15/2022), and 'Complete Manager Evaluation' (due 03/31/2022). The main content area displays 'PRICILLA PERFORMANCE' details, including Job Title (FINANCIAL SPECIALIST), Document Type (UWPKS Annual Evaluation), Template (Organizational Contributor '21), Status (In Progress), Manager (MICHAEL MANAGER), Period (01/01/2021 - 12/31/2021), and Document ID (2050). Below this, there are instructions for reviewing performance criteria and a 'Mission Statement' section. The 'Mission Statement' section is expanded to show 'Mission 1: Mission of the University of Wisconsin-Parkside' with a description: 'Our Mission, Our Vision, Our Values'. The description includes 'Our Vision' (The University of Wisconsin-Parkside is a dynamic learning community grounded in academic excellence and focused on student success, diversity, inclusion and community engagement. The campus will be a premier comprehensive public institution and a destination of choice, serving as a focal point of local, regional and global progress.) and 'Our Mission' (The University of Wisconsin-Parkside is committed to high-quality educational programs, creative and scholarly activities, and services responsive to its diverse student population, and its local, national and global communities. To fulfill this mission, the University of Wisconsin-Parkside will: - Offer high-quality academic programs rooted in the tradition of a liberal education in the arts, sciences and professions, responsive to the occupational, civic and cultural needs of the region, and actively seek the continued input of all stakeholders. - Generate, disseminate and apply knowledge through research, professional and creative activity that benefits communities throughout the

## 6. Otherwise, Manager will approve and the next step will move to Checkpoint 1.

The screenshot displays the 'Performance Process' interface for 'UWPKS Annual Evaluation'. The header includes the University of Wisconsin System logo and navigation icons. The main content area shows a confirmation message: 'You have successfully approved and completed the Define Criteria step. No additional action is required until the next step in the evaluation process.' Below this, a list of steps is shown, with 'Checkpoint 1' highlighted in yellow. The steps are:

- Define Criteria** (Completed): Due Date 04/15/2021. Actions: View, Reopen.
- Checkpoint 1** (Current Step): Due Date 07/01/2021. Action: Update and Share. Sub-step: Review with Employee.
- Finalize Criteria** (Pending): Due Date 11/15/2021. Action: Update and Complete.
- Review Self Evaluation** (Pending): Due Date 01/15/2022. Action: View.
- Complete Manager Evaluation** (Pending): Due Date 03/31/2022.

# MANAGEMENT - CHECKPOINT

1. At Checkpoint the Manager is able to add comments for the employee review then click on Share with Employee

The screenshot displays the 'Performance Process' interface for the University of Wisconsin System. The main header is red with the university logo and the text 'Performance Process'. Below the header, there are navigation icons (home, search, menu, refresh). The left sidebar shows a 'Performance Process' section with 'Steps and Tasks' and a list of tasks: 'Define Criteria' (due 04/15/2021) and 'Checkpoint 1' (due 07/01/2021). The 'Checkpoint 1' task is expanded to show 'Update and Share' and 'Review with Employee' options. The main content area is titled 'UWPKS Annual Evaluation' and 'Checkpoint 1 - Update and Share'. It shows details for 'PRICILLA PERFORMANCE' and 'MICHAEL MANAGER'. A 'Share with Employee' button is highlighted in orange. Below the button, there is a message: 'You have successfully saved this document. Your comments are currently not shared with your employee.' A list of instructions follows, including: '1. Review the performance criteria (goals, etc.) updates made by the employee, if applicable.', '2. Update the performance criteria, if applicable.', '3. Enter your comments on the employee's progress against their performance criteria and review with the employee.', '4. When complete, select the Share with Employee button to save your changes and notify the employee. This can be done before or after you meet with the employee to discuss their progress.', '5. After meeting with the employee to review, select the Complete Checkpoint button to mark this step as complete.', and '6. Tip sheets on how to use the Performance Management tool and additional help resources (SMART goal entry, etc.) can be found at [Performance Management Help](#).' At the bottom, there are tabs for 'Mission Statement', 'Goals', 'Competencies', 'Development - Growth', 'Position of Trust', 'Mandatory Training', and 'Overall Summary'.



[Performance Management Help](#)

[SMART GOALS](#)

**Questions, reach out to:**

**Human Resources**

**[hr@uwp.edu](mailto:hr@uwp.edu) or (262) 595-2204**

ANY  
QUESTIONS  
?

Thank You!