PMDP

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM

Division & Department HR Administrative Training

Talent Recruitment and Engagement
OFFICE OF HUMAN RESOURCES
UNIVERSITY OF WISCONSIN–MADISON

Table of Contents

PERFORMANCE MANAGEMENT & DEVELOPMENT PROGRAM (PMDP)

PMDP is a software program available to campus to streamline and track the activities and conversations required by UW–Madison's [performance management policy](#). The Performance Management and Development Program (PMDP) provides UW–Madison with a centralized system for tracking and documenting these actions, providing the campus with greater consistency in how performance management is recorded.

PURPOSE

The purpose of this guide is to introduce you to the PMDP administrative environment and the procedures for setting up individuals in the system as well as sustaining, maintaining and tracking Division/Department performance management activities in compliance with the performance management policy. Division/Department responsibilities within the performance management policy include:

- Monitor and maintain a performance management system that complies with the policy and supports employee and College/School/Division/Department needs
- Oversee performance management document workflow and retention programs within the division
- Provide guidance and support to supervisors and employees with the unit's specific performance management processes including cycle timelines, documentation requirements and process questions
- Consult with Division HR and OHR as needed

LEARNING OUTCOMES

At the end of this module, you will be able to:
- Identify where to access PMDP
- Define the differences in user access and permission structure
- View how to navigate the dashboard and menu structure within PMDP
- Perform admin functions such as setting up users and monitoring performance activities
- Identify additional functionality to assist managers/supervisors/employees

What are your expectations for this class?

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- -

SYSTEM ACCESS

PMDP is accessed at **pmdp.hr.wisc.edu** or through MyUW portal. The system requires single sign on with your UW-Madison NetID and password.

Go to **pmdp.hr.wisc.edu** and you will be directed to log in with your NetID and password

OR add PMDP to your MyUW portal home page.
Go to MyUW Home and type **PMDP** in the search box
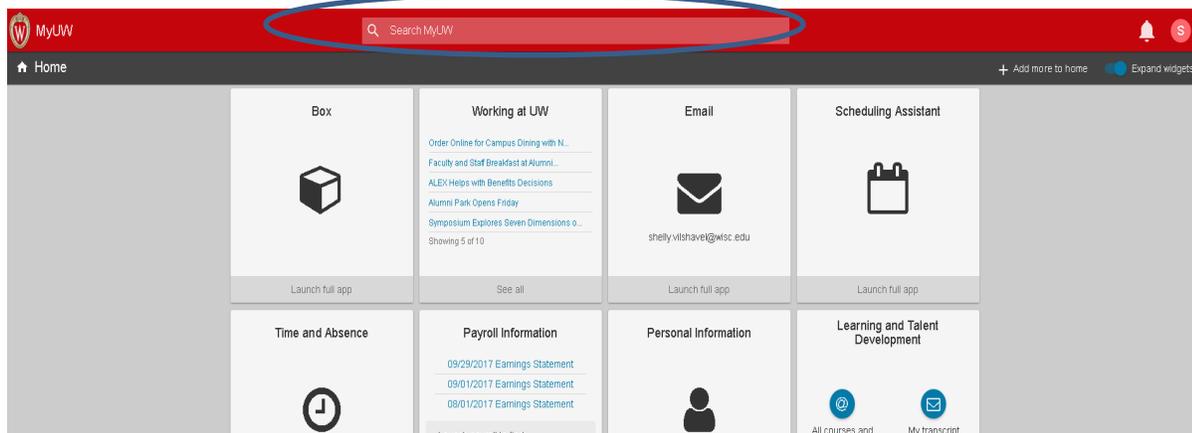
Click +Add to home to add PMDP as a widget on your home page.
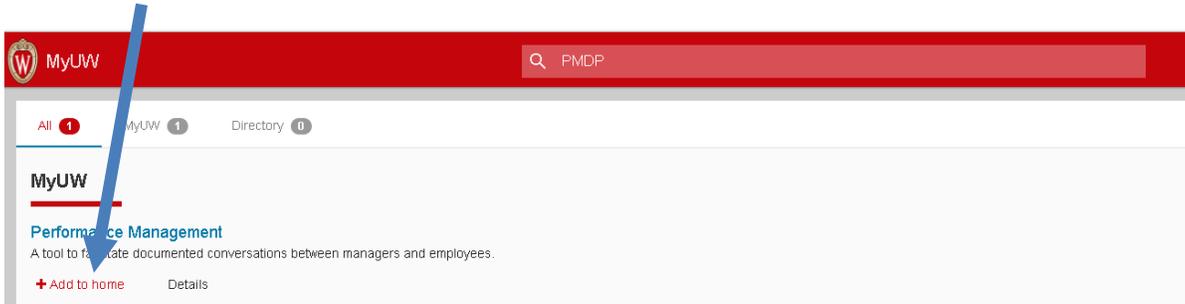
PERMISSION GROUPS

Currently, six distinct permission groups are assigned in PMDP. A combination of the permission group, the team to which you belong (based on UDDS), and the role you play, determine the actions that are available to you. The primary roles/permission groups involved in the administration include "Division HR" and "Department HR". The six permission groups include:

Permission Group	Description
Employee	Access to the employee's performance activities only. Additionally, all performance activities completed for the employee within PMDP will be available to the employee within PMDP on demand (24/7) through the website and MyUW portal.
Supervisor	Has access to performance activities for only those employees they supervise (direct reports). Additionally, will have access to their own employee performance activity (same as employee description).
Indirect Supervisor	Has viewing access only to evaluations and status of evaluations for the UDDS(s) assigned.
Department HR	Has access to view and maintain HR performance activity functions for the employees/supervisors within their assigned departments (by UDDS). Will also have access to the supervisor function if they have direct reports (same as supervisor description). Additionally, will have access to their own employee performance activity (same as employee description).
Division HR	Has all the capabilities of Department HR, as well as access to view and maintain HR performance activity functions for the entire division. Will also have access to the supervisor function if they have direct reports (same as supervisor description). Additionally, will have access to their own employee performance activity (same as employee description).
SuperUser / Administrator	Central OHR staff are the only users in this permission group. This allows full access to configure and troubleshoot the system.

Notes:

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PERMISSION GROUPS: ASSIGNING INDIRECT SUPERVISOR PERMISSION

Division and Department HR Administrators will be responsible for assigning and maintaining the Indirect Supervisor permission group.

From the top menu bar click on **Manage – Admin – Security**
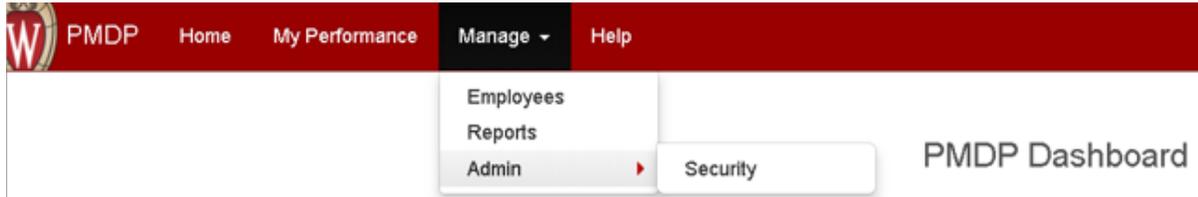
Search for the employee you wish to give Indirect Access to in the Search field.

If the employee isn't already a supervisor, you will need to click Add New User on the bottom of the screen.

1. Select Indirect Supervisor for the Role.
2. Enter the specific UDDS(s) the Indirect Supervisor should be able to see – then Add.
3. Enter comments (required) in the comments field. Your name or initials and date and any specific division information your area may require.
4. Click Save User.

User Information

Name HUTCHINSON, BRIAN

NetID ebhutchinson

1. Choose Indirect Supervisor from Role Choices

Role IndirectSupervisor

Email brian.hutchinson@wis

2. Enter specific UDDS and click Add

UDDS Access [   ] Add

*You may assign UDDS Access under A0220, A03.

A036500 ✖

Comments [   ]

3. Enter comments – name or initials and date

4000 characters remaining
This field is required

4. Click Save User on bottom right of screen

Cancel   Save User

PERMISSION GROUPS: REMOVING INDIRECT SUPERVISOR PERMISSION

From the top menu bar click on **Manage – Admin – Security**

Search by last name for the employee in the Search field.

Click delete

Click delete if you are sure you want to delete the user

HR AMIN DASHBOARD

HR Department and Division Administrators will have four tabs to view on the PMDP Dashboard.

The four tabs all HR Admin will have are:
- HR Admin
- Performance Management
- Needing Creation
- Changed Supervisors

PMDP Dashboard

HR Admin   Performance Management   Needing Creation   Changed Supervisors

HR AMIN TAB

The HR Admin tab gives a snapshot view of the divisions and/or departments that you have access to see. It allows the HR Admin to see the performance activity statistics for the calendar year. Additionally, you can drill down into each of the UDDS that you have access to in order to view that specific UDDS snapshot.

HR Admin   Performance Management   Needing Creation   Changed Supervisors

Performance evaluation statistics based on UDDS.

Search:

UDDS	Total Employees	Overdue	Notification	Week Out	Month Out	Completed in September	Completed in 2017
A480200	1	1	Send Communication	0	0	0	1
A483000	2	2	Send Communication	0	0	0	0
A484000	1	1	Send Communication	0	0	0	0
A484120	18	18	Send Communication	0	0	0	0
A484260	20	20	Send Communication	0	0	0	0
A484400	6	6	Send Communication	0	0	0	0
A484700	4	4	Send Communication	0	0	0	0
A484800	3	3	Send Communication	0	0	0	0
A484900	9	9	Send Communication	0	0	0	0
A485000	10	10	Send Communication	0	0	0	1
Total:	74 (160)	74 (160)		0 (0)	0 (0)	0 (0)	2 (7)

Supervisor Details   ✕

Search:

Supervisor	Number of Emloyees	Overdue	Week Out	Month Out
DAVIDSON, RICHARD J	1	1	0	0
DOLSKI, ISA V	1	1	0	0

Showing 1 to 2 of 2 entries   Previous   1   Next

When you drill down into each unit, you can also click on each supervisor within that unit to view the details of each supervisor's performance activities.

Supervisor Details

Search: [   ]

Supervisor	Number of Emloyees	Overdue	Week Out	Month Out
DAVIDSON, RICHARD J	1	1	0	0
DOLSKI, ISA V	1	1	0	0

Showing 1 to 2 of 2 entries

Previous **1** Next

Employee Details

Search: [   ]

Name	EmplID	Position Number	Previous Evaluation		Current Evaluation	
			Type	Date Completed	Type	Date Started
DOLSKI, ISA V	00161783	01348550				

Showing 1 to 1 of 1 entries

Previous **1** Next

Notes:

HR AMIN TAB – EMAIL COMMUNICATIONS:

You can choose to send email communications to supervisors from PMDP for the following:
- Overdue Notification (performance activities are past due)
- Start Evaluation (it is time to begin performance activities)
- Other (custom email communication)

Click Send Communication in the Notification column for the UDDS you need.

Select the supervisor(s) you wish to send the email to. Choose Communication Type and Click Send Communication.
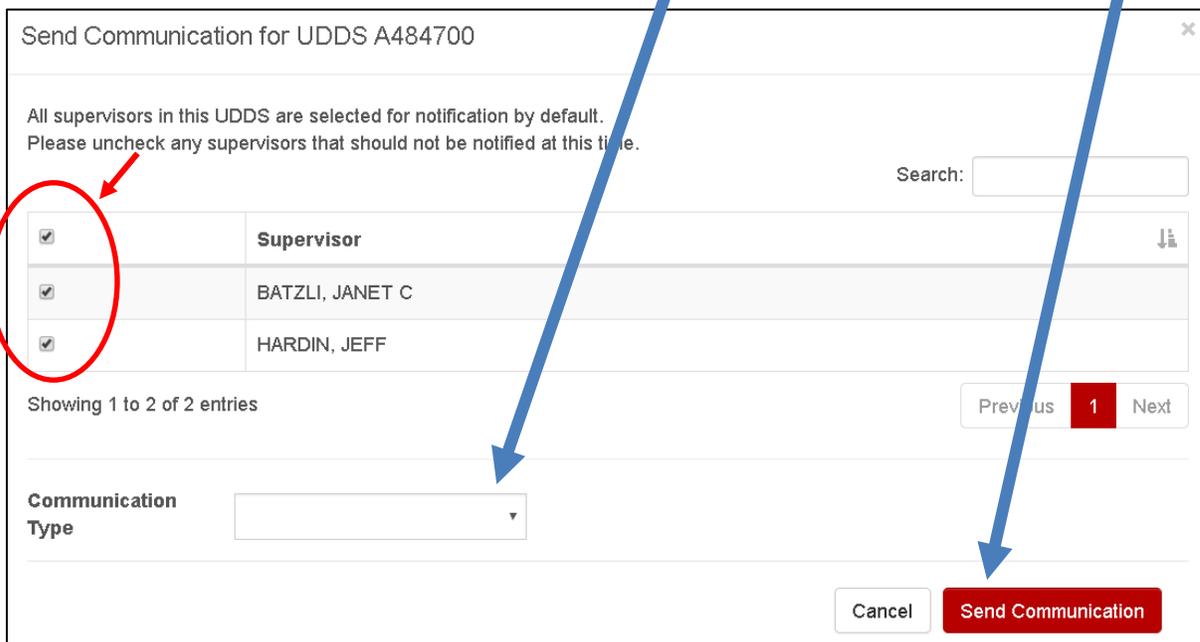
HR AMIN TAB – EMAIL COMMUNICATIONS:

The communication types are:
- Send Overdue Notification (performance activities are past due)
- Start Evaluation (it is time to begin performance activities)
- Other (custom email communication)

When you click on Send Communication, an outlook window will pop up and you will be able to edit or customize the message.

The supervisor(s) you select will be blind copied (Bcc) on the email message. The HR Administrator who initiated the communication will send it directly from outlook and therefore will have the message in their "sent" folder or can copy (Cc) themselves or others on the message. The email is sent to the supervisor and the employee is not copied.
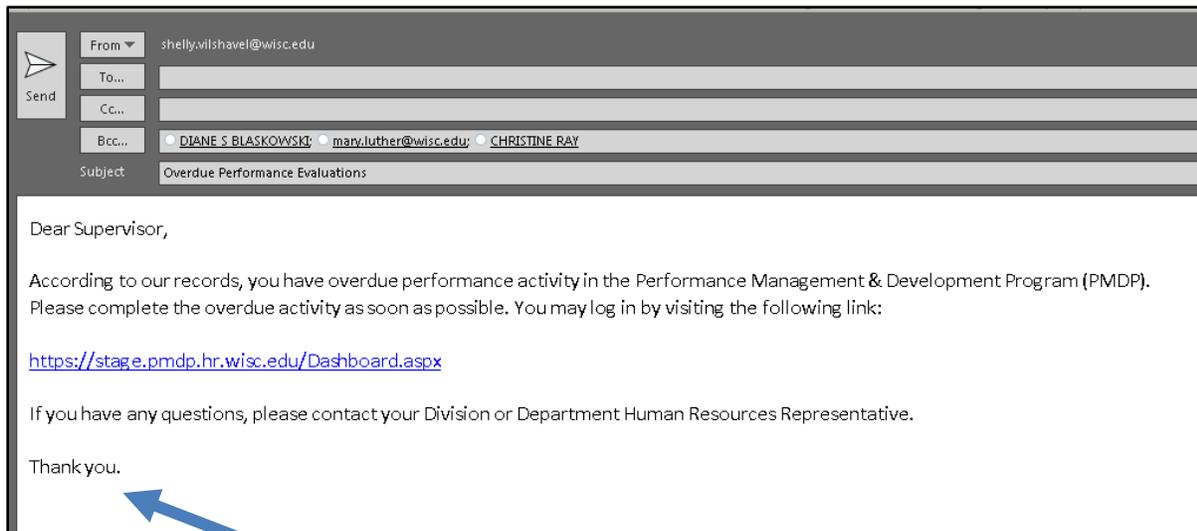
You can now put your signature on the email and modify as you see fit.

 Notes: _____

_____

HR AMIN TAB – EMAIL COMMUNICATIONS:

Send Overdue Notification (performance activities are past due)

Dear Supervisor,

According to our records, you have overdue performance activity in the Performance Management & Development Program (PMDP). Please complete the overdue activity as soon as possible. You may log in by visiting the following link:

https://stage.pmdp.hr.wisc.edu/Dashboard.aspx

If you have any questions, please contact your Division or Department Human Resources Representative.

Thank you.

Start Evaluation (it is time to begin performance activities)

Dear Supervisor,

It is time to begin the performance activity for the employees you supervise. You may log in to the Performance Management & Development Program (PMDP) by visiting the following link:

https://pmdp.hr.wisc.edu/Dashboard.aspx

If you have any questions, please contact your Division or Department Human Resources Representative.

Thank you.

Other (custom email communication)

From ▼ shelly.vilshavel@wisc.edu

To...

Cc...

Bcc... ○ DIANE S BLASKOWSKI; ○ mary.luther@wisc.edu; ○ CHRISTINE RAY

Subject

Shelly Vils Havel
Performance Management Consultant | Program Manager
Talent Recruitment & Engagement | Office of Human Resources
21 N. Park Street #5441, Madison, WI 53715
608.890.2540 | shelly.vilshavel@wisc.edu | jobs.wisc.edu

Customize your email from a blank email template

TOUR THE EMPLOYEE DETAILS

From the HR Dashboard, you can continue to drill down into the specific employees under each supervisor as well as the details of each employee's performance activities. Like most software, actions can be found in multiple places.

By clicking on the EmplID you will see the Performance Evaluation History for the employee

By clicking on the Evaluation type, you will go into that specific evaluation

TOUR THE EMPLOYEE DETAILS

Another way to find the employee details is to go on the top menu bar and select Manage – Employees

Type in the EmplID or the employee last name and click search.

Clicking on **Performance Evaluation History** will take you to Employee's Evaluation Activity History

HR NEEDING CREATION TAB

The HR Needing Creation Tab will be used two ways:

1. Initially to set up your department's supervisor / employee relationship structure into PMDP
2. As new employees are hired to assign a supervisor / employee relationship structure

INITIAL DEPARTMENT/DIVISION SET UP

Initially to set up your department's supervisor / employee relationship structure into PMDP enter the department or division into the Field and click "Search".

Review the information and click "Add All"

If you have a smaller unit and need to review the information individually, you can also click "Add" to add each employee individually.

Employees who have no supervisor listed **will not** automatically be added when selecting "Add All"

If an employee has no supervisor listed in PMDP, click "View"

DAUSCHMIDT, CARL E		02134548	BUDGET PLANNER/M	A0228	View

Employee

Search	[EmplID or Last Name] [Search]
EmplID	00603936
Name	DAUSCHMIDT, CARL E
Nickname	[Nickname]
Position Number	02134548 [...]
Start Date	2/1/2016
Probation End Date	1/31/2017
Employee Type	Academic Staff ▼
Probation Period	12 Months ▼ ❓
Supervisor	Supervisor [...]

Performance Review

Click … next to Supervisor

Begin typing supervisor's last name and if they do not appear click New Supervisor.

Assign Supervisor ✕

Search: [_____]

	NetID	Name
Select	aaarnold	ARNOLD, ALISHA A
Select	abharris3	HARRIS, ANNE B
Select	abhattachary	BHATTACHARYYA CONSIGNY, ANITA
Select	abradshaw	BRADSHAW, ANN E
Select	acpalmen	PALMENBERG, ANN C
Select	adlyle	LYLE, AMY DYANE
Select	adwhiteh	WHITEHEAD, AMY D
Select	aejunker	JUNKER, AXEL E
Select	aewendt	WENDT, AMY E
Select	aewer	EWER, ALISSA A

Showing 1 to 10 of 412 er | Previous | 1 | 2 | 3 | 4 | 5 | ... | 42 | Next |

[Remove Supervisor] [New Supervisor]

Add New Supervisor   ×

Supervisor   mather

MATHER, KATHRYN JEAN ([Undefined])

Select the appropriate supervisor

Employees

Add, View, or Update PMDP Employees

Search Employee   EmplID or Last Name   Search

Name   DAUSCHMIDT, CARL

UDDS   A022011

EmplID   00603936

Position Number   02134548

PMDP Employee Status   √ -- Exists in PMDP System.

PMDP Position Status   √ -- Exists in PMDP System.

Start Date   2/1/2016

Probation End Date   1/31/2017

Employee Type   Academic Staff ▼

Probation Period   ▼

Supervisor   MATHER, KATHY   ...

Performance Review   Performance Evaluation History

Click Save Update

Cancel Update   Save Update

Notes:

CHANGE SUPERVISORS TAB:

The Change Supervisors Tab will populate from HRS looking at PMDP. When a supervisor in the reports to field in HRS is different than the supervisor in PMDP it will show up on the changed supervisors tab.

- Very what is correct (HRS or PMDP)
- Click View next to employee
- This will bring up the employee record and if you need to change the supervisor, click on the tab next to supervisor

PMDP Dashboard

HR Admin   Needing Creation   Changed Supervisors

Employees that have different assigned supervisors in HRS

Show 10 ▾ entries   Search: [   ]

Name	Position Number	UDDS	PMDP Supervisor	HRS Supervisor	
BROADBERRY, SUZANNE E	02084606	A055000	ABING,VERA A	HULL,PHILLIP W	View
KRAUS, WILLIAM	02144996	A062080	ZOELLNER,RUSSELL PAUL	FIELD,MARK E	View
MESSING, ALBEE	02112780	A348700	SCHROEDER,PETRA	GOLDEN,ROBERT N	View
NOVAK, NICHOLAS N	02077360	A340256	RICHARDS,ANDREW J	SCHROEDER,PETRA	View
RIELLY, JULIA B	02117996	A340215	BAUER,TRISHA L	KARPELENIA,JULIE A	View
SIMONSON, RACHEL A	02070899	A340215	BAUER,TRISHA L	KARPELENIA,JULIE A	View

Showing 1 to 6 of 6 entries   Previous 1 Next

Employee

Search	[EmplID or Last Name] [Search]
EmplID	00300546
Name	RIELLY, JULIA B
Nickname	[Nickname]
Position Number	02117996 ...
Start Date	6/14/2015
Probation End Date	[Probation End Date]
Employee Type	University Staff ▾
Probation Period	6 Months ▾ ❓
Supervisor	BAUER, TRISHA L ...
Performance Review	Performance Evaluation History

CLOSING AND RE-OPENING AN EVALUATION

There are certain circumstances in which HR Administrators need to close and re-open evaluations.

- Supervisor started in error and cannot delete – move forward – and evaluation is not able to be finalized.
- Supervisor or employee left the department prior to evaluation being completed.
- Employee or supervisor needed to attach or re-attach a document
- Open evaluation and supervisor has changed – You cannot change the supervisor if there is an open evaluation
- Other as needed by division/department

HOW TO: CLOSE AN EVALUATION

- From your dashboard click on Manage – Employee – Search Employee – Click on Performance History

- or From the HR Admin tab click on the UDDS of the department and drill down to the supervisor and then to the employee – Click on either the EmplID or the Evaluation Type

- Click Close Eval

Comments are required for the reason evaluation is being closed by HR

HOW TO: RE-OPEN AN EVALUATION

- From your dashboard click on Manage – Employee – Search Employee – Click on Performance History

- or From the HR Admin tab click on the UDDS of the department and drill down to the supervisor and then to the employee – Click on either the EmplID or the Evaluation Type

- View the evaluation

- Click on Re-Open Eval

Performance Evaluation

Employee EmplID	00030691
Employee Name	MOY, DEBBIE M
Evaluation Type	Midpoint Conversation
Evaluation Status	Closed By HR

General   Expectations   Goals   Attachments   Overall Rating

Re-Open Eval

Human Resources Re-opening Evaluation   ✕

◉ Human Resources is re-opening this evaluation. (Please add comments below.)

Comments

4000 characters remaining

Re-Open Evaluation

Comments are required for the reason evaluation is being re-opened by HR

Once Evaluation has been re-opened:

- Supervisor and employee can make changes to any sections they are responsible for completing
- Supervisor and employee need to allow each other to view (Go through process again to confirm they are both aware of any changes)
- Supervisor finalizes, and employee acknowledges

ATTACHING A DOCUMENT

- The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachments examples: letter of commendation, certificate of training, customer feedback or other templates such as SMART Goal template.

- Attachment file size may not exceed 2MB

- HR Admins can also attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

Performance Evaluation   Back to Performance List

Employee EmplID   00030691
Employee Name   MOY, DEBBIE M
Evaluation Type   Midpoint Conversation
Evaluation Status   Closed By HR   Re-Open Eval

General   Expectations   Goals   Attachments   Overall Rating

The supervisor and employee may each upload one document (multiple documents must be combined in a single PDF or ZIP file). Attachment examples: letter of commendation, certificate of training, resume, customer feedback. Attachment file size may not exceed 2MB.

Human resources can attach one additional document after an evaluation is complete. All attachments are visible to the employee, supervisor, and human resources.

The uploaded file must not exceed 2MB in size.

Attachment   Browse...

Supervisor Attachment   Sample Summary Performance Evaluation 2.17.pdf

Employee Attachment   Final Midpoint Conversation 3.17.pdf

                                                                              Save

Click on browse to select the file you wish to upload and then click Save

ACKNOWLEDGING ON BEHALF OF THE EMPLOYEE

- If an employee refuses to acknowledge receipt of the evaluation, HR Admin has the capability to acknowledge on behalf of the employee

- This functionality should only be used in cases where employee will not sign off on the evaluation

Click on Employee Acknowledgement

Type in comments and click acknowledge

LOG: HISTORY AND COMMENT TRACKER

The Log tab is an administrative tab that only Department / Division HR will see. The Log captures certain evaluation status history and serves as a comment area for HR Administration to keep notes pertaining to the evaluation if necessary.
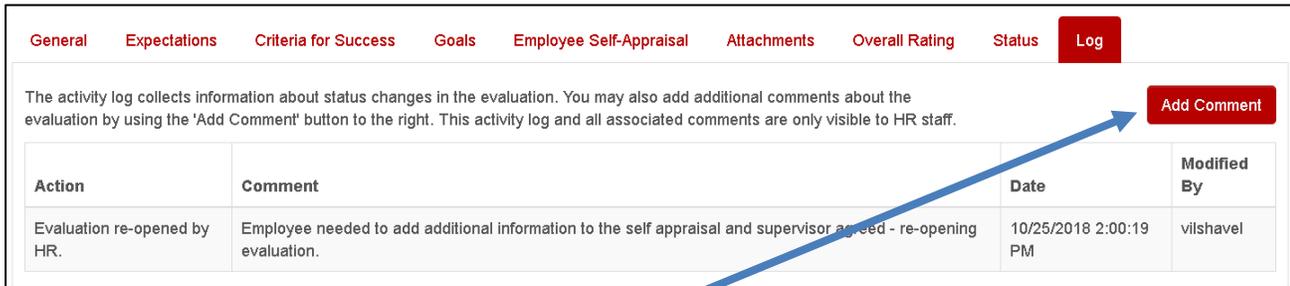
General	Expectations	Criteria for Success	Goals	Employee Self-Appraisal	Attachments	Overall Rating	Status	**Log**

The activity log collects information about status changes in the evaluation. You may also add additional comments about the evaluation by using the 'Add Comment' button to the right. This activity log and all associated comments are only visible to HR staff.

Add Comment

Action	Comment	Date	Modified By
Evaluation re-opened by HR.	Employee needed to add additional information to the self appraisal and supervisor agreed - re-opening evaluation.	10/25/2018 2:00:19 PM	vilshavel

To Add a comment click Add Comment

Type in the comment and click Submit
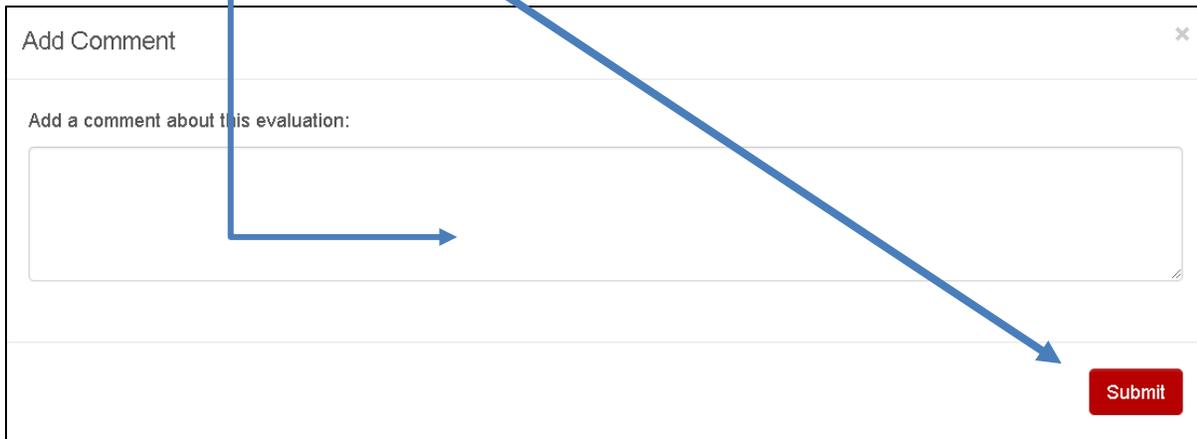
Add Comment ✕

Add a comment about this evaluation:

Submit

Notes:

_____

_____

_____

_____

SAMPLE EMAIL COMMUNICATIONS

Performance Activity Ready to View	Supervisor Complete

Dear {{EMPLOYEE_NAME}},

Your supervisor has allowed you to view your {{EVALUATION_TYPE}} and can be accessed via this link:
{{PERFORMANCE_LINK}}

You can review all information and ratings but can only make changes to the self-appraisal and/or upload an attachment. (The self-appraisal tab is only included on Summary Evaluation and Summary Probation Evaluation types.) The next step is to have a conversation with your supervisor. If you have any changes to make you will need to complete those prior to your supervisor finalizing the evaluation. Your supervisor will then finalize their portion. You will receive an email notification when the evaluation has been finalized and is waiting for your acknowledgement.

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Performance Activity Started	Evaluation Started (Thirty Day, Mid Probation, and Midpoint)

Dear {{EMPLOYEE_NAME}},

A performance activity has been started by your supervisor {{MANAGER}}. Once your supervisor is ready for you to view the information you will receive an email with a link to the evaluation. There is no action needed on your part until you receive the email.

Thank you. If you have any questions, please contact your supervisor or your Human Resources unit.

Performance Activity Started	Evalutation Started (Summary and Summary Probation)

Dear {{EMPLOYEE_NAME}},

A performance evaluation activity has been started by your supervisor. You are now able to work on the self-appraisal portion of the evaluation. Your input in the self-appraisal will assist in conversations with your supervisor. You can also add an attachment if desired. You do not have to complete all at once. You can log back in at any time. Your supervisor will not be able to see your self-appraisal until you have allowed their access to view.

When you have completed the self-appraisal and added an attachment (if desired), click on the yellow box at the top of the page that says "Allow Supervisor View".

The evaluation can be accessed via this link:
{{PERFORMANCE_LINK}}

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Performance Evaluation Complete	Employee Acknowledgement

Dear {{EMPLOYEE_NAME}},

Your performance activity has been completed and is ready to view via this
link: {{PERFORMANCE_LINK}}

You can access the Performance Management & Development Program (PMDP) to view this or other evaluation activity completed in PMDP.

{{AGREES_OR_DISAGREES_STATEMENT}}

{{EVALUATION_PDF_LINK}}

{{EMPLOYEE_ATTACHMENT_LINK}}

{{MANAGER_ATTACHMENT_LINK}}

{{HR_ATTACHMENT_LINK}}

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Employee Self-Appraisal Complete	Employee Complete (Summary and Summary Probation)

Dear {{MANAGER}},

Your employee {{EMPLOYEE_NAME}} has completed the self-appraisal portion of the performance evaluation and you now have access to view. You can access via this link:
{{PERFORMANCE_LINK}}

The next step is to review the employee self-appraisal, complete your portions of the evaluation and allow employee to view/review the information. Your portions of the evaluation that need to be completed before allowing employee to view are: General, Expectations, Criteria for Success (if applicable) and Goals.

Once you have the performance conversation with {{EMPLOYEE_NAME}} you will need to make any changes (if applicable), complete the overall rating tab and when ready click "Finalize Evaluation."

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Employee Acknowledgement	Evaluation Complete

Dear {{EMPLOYEE_NAME}},

Your {{EVALUATION_TYPE}} has been finalized by your supervisor {{MANAGER}}. You are now able to view the information and acknowledge receipt. You can access via this link: {{PERFORMANCE_LINK}}

You will not be able to make any changes, but can add final comments when you acknowledge. Click on the "Employee Acknowledgement" and agree or disagree with the content. Add comments if desired. Click on "Acknowledge". Once this step has been completed you and your supervisor will receive an email with a link to the PDF of your evaluation and any attachments (if applicable).

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

Employee Complete (Thirty Day, Mid Probation, and Midpoint)	Employee Complete (Thirty Day, Mid Probation, and Midpoint)

Dear {{MANAGER}},

Your employee {{EMPLOYEE_NAME}} has had the opportunity to review the evaluation information, uploaded an attachment if desired and allowed supervisor view. You can access via this link: {{PERFORMANCE_LINK}}

The next step is to review the attachment (if applicable), meet with employee and have a performance conversation.

Once you have the performance conversation with {{EMPLOYEE_NAME}} you will need to make any changes (if applicable), complete the overall rating tab and when ready click "Finalize Evaluation."

Thank you. If you have any questions please contact your supervisor or your Human Resources unit.

If the employee receives a Not Meeting Expectation on any evaluation the following message is sent only to the HR Administrator team – not to the supervisor or employee:

Employee Is Not Meeting Expectations	Employee is Not Meeting Expectations

Dear Human Resources Representative:

A performance evaluation for {{EMPLOYEE_NAME}} has been completed and is ready to view via this link:
{{PERFORMANCE_LINK}}.

The Overall Rating is Not Meeting Expectations.

Thank you.

IMPORTANT REMINDERS:

- Once a supervisor and employee finalize the evaluation, an email will be sent with an attached PDF copy of the evaluation:
    - To: Employee
    - CC: Supervisor
    - BCC: Division/Department HR
- School/college/division human resources is responsible for ensuring a copy is transferred into the employee P-File (electronic or paper)

REPORTS:

PMDP administrators can generate a report to review performance activities within a specified date range. Instructions for creating and interpreting the report can be found at:

- https://hr.wisc.edu/docs/pmdp/performance-activity-report-job-aid.pdf

QUESTIONS:

- **All questions from supervisors and employees should first be directed to the Division/Department HR area**

TO REPORT SYSTEM PROBLEMS (DIVISION/DEPARTMENT HR ONLY):

- pmdp@wisc.edu

Christine Ray
Onboarding and Performance Management Specialist
Talent Recruitment and Engagement
Office of Human Resources
christine.ray@wisc.edu
pmdp@wisc.edu