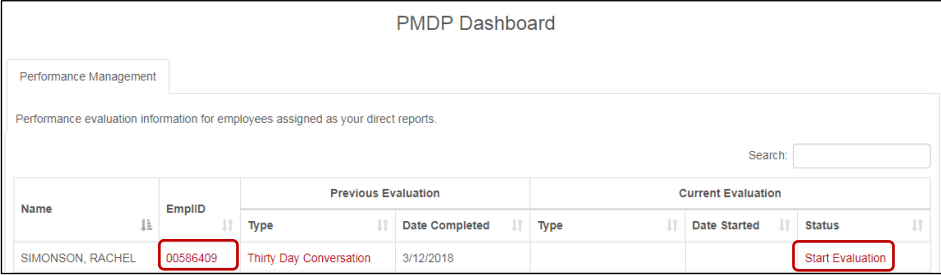

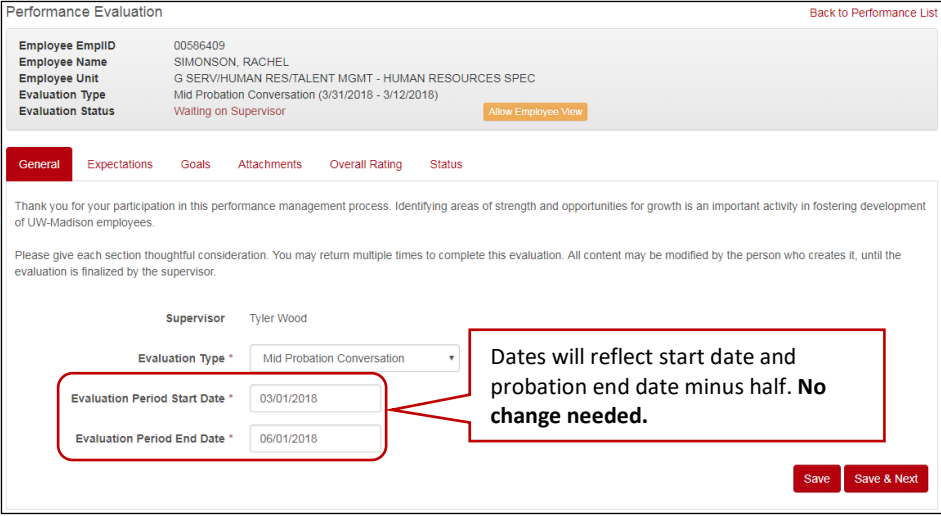


HOW TO: COMPLETE A MID PROBATION CONVERSATION



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
<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 Mid Probation Conversation and Create.</p> 	<p>3. Employee receives email indicating an evaluation has been started for them. No action required.</p>
<p>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.</p> 	<p>4. No action required.</p>

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 1073" 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 save and exit PMDP.
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 . <div data-bbox="889 1346 1045 1388" 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 1608 1406 1650" 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