Wolfpack Performance Program SHRA Performance Management Cycle Timeline

Cycle Activity Dates

- **Start of SHRA PM Cycle — April 1**
- **Complete PM Goal Setting (Define Criteria) — June 1**
- **Conduct Interim Reviews (Checkpoints 1-3) — Sept - December**
- **Prepare for Year End Evaluations (Finalize) — Feb - March**
- **End of PM Cycle — March 31**
- **Complete Manager Evaluations — March - April**
- **Submit Final Overall Ratings — May 15**

Immediate Supervisors

- Supervisor begins to establish goals and professional development objectives
- Supervisor meets with employee(s), refines goals and professional development, and completes the performance planning stage
- Up to 3 checkpoints of any type (Interim, Probationary, and Employee-Requested reviews) may be conducted and entered into the "Checkpoint" step in the WPP during this time period. These reviews should be completed by the end of January of the plan year.
- Supervisor prepares for the end of the performance cycle. This is the last opportunity to make changes to the performance plan goals or professional development objectives.
- Supervisor enters final comments, attachments, and reviews the document with employee. This is the last chance for the employee to add comments (Note: overall rating entry occurs after this step, but no additonal employee comments can be made later)
- Supervisor enters final ratings, final comments, nominates particpants (dotted line, prior supervisors, and/or next level managers) and completes the flexible work arrangements annual review. All final entries should be discussed with the employee.
- Final overall ratings must be entered into the WPP.

Next Level Supervisors

- Next Level Managers can view performance plans for their indirect reports once the supervisor has made entries in the Define Criteria step in the WPP.
- Supervisors share their planned comments and projected overall ratings for the emplyee with their next level manager prior to completing the evaluation.
- Supervisor can use the "Nominate Particpants" step to invite Next Level Managers to enter comments directly onto the employee's performance plan. This is not required, but must be done before the plan is completed by the supervisor.

PM Coordinators

1. PM Coordinators remind supervisors to begin their new performance plans on or after April 1 but not before!
2. PM Coordinators run queries periodically to make sure the employees hired after April 1 have plans created by their supervisors
3. PM Coordinators run queries periodically to ensure that plans for transferred or separated employees are appropriately closed or canceled in WPP
4. PM Coordinators run queries to see what supervisors have not reached the Checkpoint step in WPP
5. PM Coordinators remind supervisors to prepare to finalize their employees' performance plans
6. PM Coordinators run weekly queries or use the dashboard to determine what plans have not been completed.
7. PM Coordinators work with UHR-ER to address missing ratings or plans that are stuck at a Step due to an employee or supervisor absence.