

Guidelines for Employees/Managers Regarding the Performance Evaluation Process

The ePerformance system has deadlines that are set to keep employees and managers on task/flowing through the process throughout the year. It is important that these deadlines are met to ensure the performance document is ready for submission by the end of the year. Use the timelines listed below as more formal guidelines for submissions.

IMPORTANT: The latest deadline to completely finalize a prior year's performance documents is March 1st of the following year. For more information regarding goal setting, timelines, and guides please visit <https://uwosh.edu/hr/eperformance/>.

ePerformance Submission and Performance Review Timelines:

January 1 to March 1	Define Criteria (Set Goals) for year
March 1	Prior years evaluation due in ePerformance system
June 1	Mid-year checkpoint completed and reviewed with employee
November 1	Finalize Criteria (Finalize Goals)
January 1	Self-evaluations due
March 1	Prior calendar year review due

Define Criteria Deadline:

The Define Criteria step should be finalized by **March 1st**. The criteria entered are the goals that will be evaluated during the staff member's performance review. This step should be done regardless of the employee's start date unless the employee starts after November 1st.

- Hire date of January 1st through February 28th: complete this step by March 1
- Hire date of March 1st through October 31st: complete this step within the first 30 days of start date
- Hire date of November 1st through December 31st: no performance review needed. Review cycle will begin on January 1st of the following year
- The system will automatically pick a deadline of March 1 and send an email stating that this step is due. Disregard if hired after March 1st

Mid-year Checkpoint Deadline:

The deadline for the Mid-year Checkpoint step is **June 1st**. If you have a new employee who has started after May 1st you can skip this step.

- Hire date of January 1st through April 30th: complete this step by June 1st
- Hire date of May 1st, or later: skip this step; scroll to the bottom of the following for instructions on how to do this: [Checkpoint - Manager \(wisconsin.edu\)](https://uwosh.edu/hr/eperformance/guides/checkpoint-manager)

Human Resources

800 Algoma Blvd. | Oshkosh, WI 54901

PHONE (920) 424-1166 | FAX (920) 424-2021 | WEB uwosh.edu/hr

Finalize Criteria Deadline:

The deadline to Finalize Criteria is **November 1st**. If an employee has started from November 1-December 31 you do not need to complete the performance review process for that year.

Self-Evaluation Deadline:

All employees should complete their self-evaluation **by January 1st**. If an employee has started November 1-December 31 you do not need to complete the performance review process for that year.

Final Evaluation Deadline:

The evaluation is due to Human Resources in ePerformance by **March 1st**. If an employee has started November 1-December 31 you do not need to complete the performance review process for that year.

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