



## Performance Management Plan

Frequently Asked Questions (FAQs)

Updated 7-12-10

Answers to frequently asked questions about the new Performance Management Plan are provided below for your information. If you have a question that's not included here, please email us at [PerformanceMgmt@uah.edu](mailto:PerformanceMgmt@uah.edu). Questions are divided into five categories:

1. General Questions
2. Personal Review Worksheet
3. Performance Evaluation Form
4. Development Plan
5. Other Questions

### General Questions

Q	<b>What is the new Performance Management Plan (PMP)?</b>
A	<ul style="list-style-type: none"><li>• This is a fully electronic performance evaluation tool that may be accessed through Banner Self-Service. The PMP replaces the old performance appraisal forms.</li><li>• The PMP includes three forms:<ul style="list-style-type: none"><li>○ Personal Review Worksheet</li><li>○ Performance Evaluation Form</li><li>○ Professional Development Plan</li></ul></li><li>• The PMP is used for full-time, non-faculty employees. Full-time employees are considered to have an FTE of at least .80.</li></ul>
Q	<b>Can this Performance Management Plan be used for other positions such as Part-time employees, On-Call, and Students?</b>
A	<ul style="list-style-type: none"><li>• Yes. Even though the PMP is required only for all full-time, non faculty employees with an FTE of at least .80, it may be used for other positions at the manager's discretion. (e.g. permanent part-time employees)</li></ul>
Q	<b>Where can I find more information on the Performance Management Process?</b>
A	<ul style="list-style-type: none"><li>• We have prepared a Human Resources web page <a href="http://www.uah.edu/admin/HR/performancemgt.php">http://www.uah.edu/admin/HR/performancemgt.php</a> that provides information on many of topics associated with the Performance Management Process.</li><li>• The Human Resources team is also available to answer any questions you may have or assist you in completing the evaluation forms.</li></ul>



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Q	<b>Are employees able to make comments or suggestions about the new Performance Management Process?</b>
A	<ul style="list-style-type: none"> <li>• Yes! We want your feedback on the new PMP. Send your questions, comments, or suggestions to <a href="mailto:PerformanceMgmt@uah.edu">PerformanceMgmt@uah.edu</a>. We are already working on enhancements for Version 2.0, so your input is important.</li> </ul>
Q	<b>Who do I contact if I need training?</b>
A	<ul style="list-style-type: none"> <li>• If you have questions on the training schedule or want to arrange training session, please contact Debra R. Carter at 824-2281 or <a href="mailto:carterd@uah.edu">carterd@uah.edu</a>. Instructions and sample forms are also available on the HR website at <a href="http://www.uah.edu/admin/HR/performancegmt.php">http://www.uah.edu/admin/HR/performancegmt.php</a>.</li> </ul>
Q	<b>What is the rating period for this year's evaluation?</b>
A	<ul style="list-style-type: none"> <li>• The performance evaluation covers the period from June 1– May 31.</li> </ul>
Q	<b>What is the deadline to complete the evaluation?</b>
A	<ul style="list-style-type: none"> <li>• Evaluations should be completed by <b>August 31</b>.</li> </ul>
Q	<b>How do I get started?</b>
A	<ul style="list-style-type: none"> <li>• The Personal Review Worksheet is the first step in the evaluation process. To access your Personal Review Worksheet, log in Banner Self-Service, click on the <b>"Employee"</b> tab, then click on <b>"Personal Review Worksheet."</b></li> </ul>
Q	<b>I don't have access to Banner Self Service, how will I complete the online Performance Management Process?</b>
A	<ul style="list-style-type: none"> <li>• If you do not have access to Banner Self-Service or don't remember your PIN, send an email with your name and A# to <a href="mailto:PerformanceMgmt@uah.edu">PerformanceMgmt@uah.edu</a>.</li> </ul>
Q	<b>I don't have access to a computer, how will I complete the online PMP?</b>
A	<ul style="list-style-type: none"> <li>• If you don't have access to a computer or aren't comfortable using a web-based application, please contact Human Resources and we will assist you in completing a hard copy evaluation form.</li> </ul>
Q	<b>I am having technical problems with the online PMP. Who should I contact?</b>
A	<ul style="list-style-type: none"> <li>• Send a detailed description of your problem to <a href="mailto:PerformanceMgmt@uah.edu">PerformanceMgmt@uah.edu</a>.</li> </ul>



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Q	<b>I received a list of employees for my department, but the list is not accurate. Who do I contact to make the corrections?</b>
A	<ul style="list-style-type: none"> <li>• Complete the <b>Routing Request Form</b> located on the HR webpage:  <a href="http://www.uah.edu/admin/HR/performancegmt.php">http://www.uah.edu/admin/HR/performancegmt.php</a>.</li> </ul>
Q	<b>How did you determine which employees a manager/supervisor is to evaluate?</b>
A	<ul style="list-style-type: none"> <li>• The list sent to managers/supervisors is based on the approval queues established for web time entry.</li> </ul>
Q	<b>My immediate supervisor does not sign my Web Time Entry timesheet, how can I correct the routing process?</b>
A	<ul style="list-style-type: none"> <li>• Complete the <b>Routing Request Form</b> located on the HR webpage:  <a href="http://www.uah.edu/admin/HR/performancegmt.php">http://www.uah.edu/admin/HR/performancegmt.php</a>.</li> </ul>
Q	<b>Our department uses manual/hardcopy timesheets, how will I complete the evaluations?</b>
A	<ul style="list-style-type: none"> <li>• If your department is not set-up on web time entry, you have two options for completing the performance evaluation: <ul style="list-style-type: none"> <li>◇ Contact Human Resources so we can set-up an approval queue for your department.</li> <li>◇ Complete a hard copy of the evaluation form.</li> </ul> </li> </ul>
Q	<b>Will my overall performance rating be tied to my merit increase?</b>
A	<ul style="list-style-type: none"> <li>• Yes, in the future, the performance evaluation score will be linked to the employee's merit increase.</li> </ul>
Q	<b>How will merit increases link to performance?</b>
A	<ul style="list-style-type: none"> <li>• The Performance Management Task Force is continuing to develop this phase of the project. We will share more information as soon as these decisions are finalized.</li> </ul>
Q	<b>I've been employed with UAHuntsville less than six months. Am I required to complete this process?</b>
A	<ul style="list-style-type: none"> <li>• Employees who have been employed with UAHuntsville for less than six months do not have to complete the PMP. They should be evaluated using the Probationary/Orientation Performance Review Form which can be found here:  <a href="http://www.uah.edu/admin/HR/forms.php">http://www.uah.edu/admin/HR/forms.php</a>.</li> </ul>



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Q	What are <a href="#">Performance Elements</a> ?
A	<ul style="list-style-type: none"><li>• Performance elements are attributes of job performance that an employee exhibits in performing job responsibilities. Each performance element is assigned a weight between a specified range. The weight ranges are indicated on the evaluation form.</li> <li>• The seven performance elements included in the new PMP are:<ol style="list-style-type: none"><li>1. <b>Technical Knowledge and Skills Competence</b></li><li>2. <b>Working Relationships</b></li><li>3. <b>Communications</b></li><li>4. <b>Engagement and Accountability</b></li><li>5. <b>Customer Relations</b></li><li>6. <b>Management and Leadership</b></li><li>7. <b>Diversity/EEO</b></li></ol></li></ul>

Q	What are Performance Ratings?
A	<ul style="list-style-type: none"><li>• The performance rating is a numerical representation of the manager's assessment of an employee's performance in each performance element. Each employee may be rated between 1 and 5 for each performance element and will also be assessed an overall performance rating based on the total final score of the performance evaluation.</li> <li>• The five performance rating options are:<ol style="list-style-type: none"><li>5 - <b>Exceptional</b></li><li>4 - <b>Commendable</b></li><li>3 - <b>Satisfactory</b></li><li>2 - <b>Marginal</b></li><li>1 - <b>Unsatisfactory</b></li></ol></li></ul>



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Q	<b>What are the three electronic forms included in the PMP?</b>
A	<ol style="list-style-type: none"> <li><b>1. Personal Review Worksheet</b> <ul style="list-style-type: none"> <li>○ This form should be completed by both supervisory and non-supervisory personnel.</li> <li>○ This is a self-assessment form which the employee uses to assess their performance during the rating period, develop goals and planned accomplishments for the next review period, and identify barriers that affect their performance.</li> </ul> </li> <li><b>2. Performance Evaluation Form</b> <ul style="list-style-type: none"> <li>○ This is the evaluation form that should be completed by manager/supervisors for each employee.</li> </ul> </li> <li><b>3. Development Plan</b> <ul style="list-style-type: none"> <li>○ This form should be completed by supervisory personnel for employees who receive an overall evaluation score of (2) Marginal or (1) Unsatisfactory.</li> </ul> </li> </ol>
Q	<b>I don't agree with my supervisor's evaluation of my performance. Do I still have to sign the evaluation form?</b>
A	<ul style="list-style-type: none"> <li>• By signing your evaluation, you are <b>only</b> acknowledging that you have received and reviewed the evaluation. It does not mean that you agree with the evaluation.</li> <li>• Once you have signed the form, you will have the option to submit the reasons why you disagree with your supervisor's assessment. Your rebuttal will be emailed to your supervisor and will also become a part of your performance evaluation record that is kept in your personnel file.</li> </ul>
Q	<b>What's the difference between performance goals and a development plan?</b>
A	<ul style="list-style-type: none"> <li>• Performance goals are targets that are set for each performance element. These goals should be developed collaboratively between the employee and their manager/supervisor. The Professional Development Plan is a specific tool used to assist in remediating employees who have received a poor performance evaluation.</li> </ul>
Q	<b>What happens if I change jobs or my supervisor changes?</b>
A	<ul style="list-style-type: none"> <li>• The change in supervisor will be updated based on information on the Personnel Action Form.</li> </ul>



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Q	<b>I'm a new supervisor, who would rate my employees on past year performance?</b>
A	<ul style="list-style-type: none"> <li>If you are a new supervisor, contact Human Resources for assistance in completing evaluations for your employees.</li> </ul>

Q	<b>How can I get a copy of my job description?</b>
A	<ul style="list-style-type: none"> <li>Job descriptions are available in Human Resources.</li> </ul>

Q	<b>How do I update my Job Description?</b>
A	<ul style="list-style-type: none"> <li>To update your job description, obtain your supervisor's approval and then complete a Staff Position Questionnaire (which can be found here: <a href="http://www.uah.edu/admin/HR/forms.php">http://www.uah.edu/admin/HR/forms.php</a> ). The completed form should be submitted to Cindy Backus at <a href="mailto:backusc@uah.edu">backusc@uah.edu</a> for review.</li> </ul>

Q	<b>What happens to my Performance Evaluation after it is completed?</b>
A	<ul style="list-style-type: none"> <li>Your completed performance evaluation will be attached electronically to your Banner personnel file using Web Xtender. In future years, these evaluations will be archived by year so that you can access a prior year's evaluation.</li> </ul>

Q	<b>Will there be further enhancements to the Performance Management Process?</b>
A	<ul style="list-style-type: none"> <li>Yes! The PMP Task Force already has a list of enhancements that we're working on for Version 2.0.</li> </ul>

### Personal Review Worksheet

Q	<b>Why should all employees complete the Personal Review Worksheet?</b>
A	<ul style="list-style-type: none"> <li>The Personal Review Worksheet serves two purposes. First, it gives employees an opportunity assess their performance during the rating period as well as indicate any concerns they may have. Second, the worksheet provides valuable feedback for managers to assist in establishing goals and performance objectives for the next rating period.</li> </ul>



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Q	<b>Is there a character limitation for each field within the forms?</b>
A	<ul style="list-style-type: none"> <li>The character limitation is 4,000 characters per question. In future versions, you will also have the option to upload an attachment.</li> </ul>

### Performance Evaluation

Q	<b>Should managers/supervisors enter comments, assign goals, and assess ratings for all seven Performance Elements?</b>
A	<ul style="list-style-type: none"> <li>Yes, the supervisor is required to enter written narrative statements for all seven Performance Elements, set goals for next rating period, assign weights for each performance element, and rate the employee using one of the five performance ratings. The feedback should be honest, accurate, timely and based upon job related objectives.</li> <li>The comments help the employee understand how they were assessed in each performance element and may also be used in establishing goals and performance objectives.</li> <li>You will not be able to submit the evaluation form if any of the comment fields are left blank.</li> </ul>

Q	<b>I don't believe my employee's position requires skill in one of the seven Performance Elements (e.g. Management and Leadership). Should I skip this field?</b>
A	<ul style="list-style-type: none"> <li>All employees should be rated on all seven Performance Elements.</li> </ul>

Q	<b>Who determines the assigned weights?</b>
A	<ul style="list-style-type: none"> <li>The supervisor should assign weights to each performance element based upon the employee's job description and the supervisor's assessment of how the job is performed.</li> </ul>



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Q	<b>Once I set up the assigned weights for a position, will I have to set them up again for next years evaluation?</b>
A	<ul style="list-style-type: none"> <li>The weights that you assign this year will be saved for you to access during the next rating period. At that point, you will have the option of continuing with the same weights or making adjustments.</li> </ul>

### Development Plan

Q	<b>Is the Development Plan required for all employees?</b>
A	<ul style="list-style-type: none"> <li>The Development Plan is required for employees that receive an overall final score of <b>(1) Unsatisfactory</b> or <b>(2) Marginal</b>.</li> </ul>

Q	<b>I want to improve my skills. How can I get a list of training resources and seminars available either on campus or in the area?</b>
A	<ul style="list-style-type: none"> <li>Human Resources is in the process of developing a Training Resources link that will be available on the HR web page. This link will list training seminars/workshops that are available in our area.</li> </ul>

### Other Questions

Q	<b>Are IPAs required to complete the evaluation?</b>
A	<ul style="list-style-type: none"> <li>You do not have to complete a PMP for an IPA.</li> </ul>

Q	<b>I just received a promotion and my position title changed, will the new title appear on the online evaluation?</b>
A	<ul style="list-style-type: none"> <li>Yes.</li> </ul>

Q	<b>I work for two supervisors (50% for each department). Will I receive two evaluations?</b>
A	<ul style="list-style-type: none"> <li>The supervisors should work collaboratively to complete the evaluation and determine which supervisor will actually enter the information into the online form.</li> </ul>