

2024 - 2025

UMB Performance Management Program Evaluation Form Instructions for Staff

This document in its entirety is guidance. It is not intended to replace existing policies, procedures, practices, or MOUs.

The Performance Management Program (PMP) is UMB's formal, annual process for employee evaluation and development. Participating in the PMP process is a critical responsibility for every supervisor, and it is expected that an evaluation be completed at the end of the performance cycle for each eligible employee. By using the process, employees are clear about goals, objectives, and expectations that are essential to an employee's development and overall success.

Performance Management Cycle: April 1 st – March 31 st					
Employee Class	Performance Planning Phase 1	Performance Feedback and Development Phase 2	Mid-Cycle Review	Performance Evaluation Phase 3	Performance Evaluation Due Date
Non-Exempt	May 1 st – May 31 st	Ongoing	October	April 1 st – 30 th	April 30 th
Exempt	June 1 st – June 30 th	Ongoing	November 30 th	April 1 st – June 1 st	June 1 st

The electronic performance evaluation forms will be available through the online portal below:

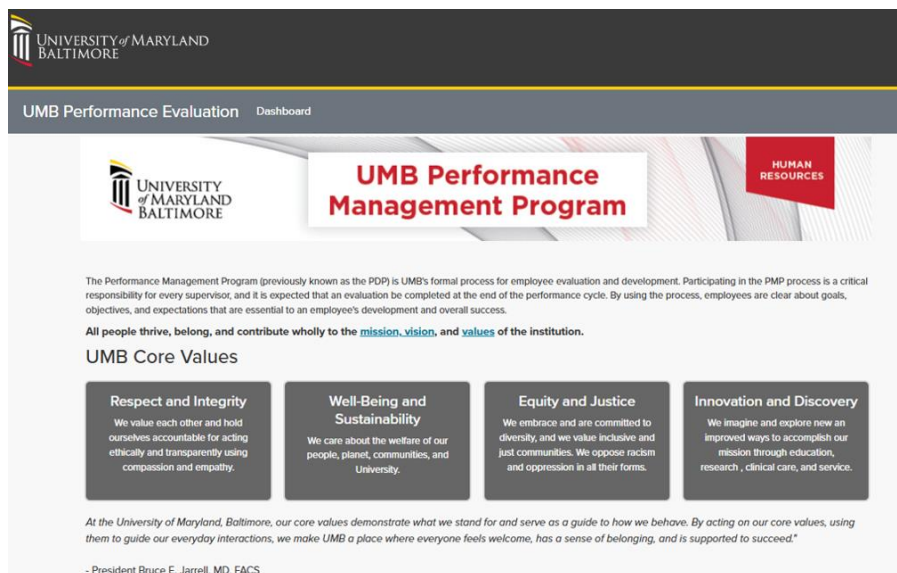
- Human Resource Services (HRS)-Employee and Labor Relations (ELR) website:
- [UMB Performance Management Program](#)
- HR widget on [myUMB](#) labeled UMB PMP Evaluation Form
- Preferred web browsers: Edge, Chrome, Firefox

Tools and Resources:

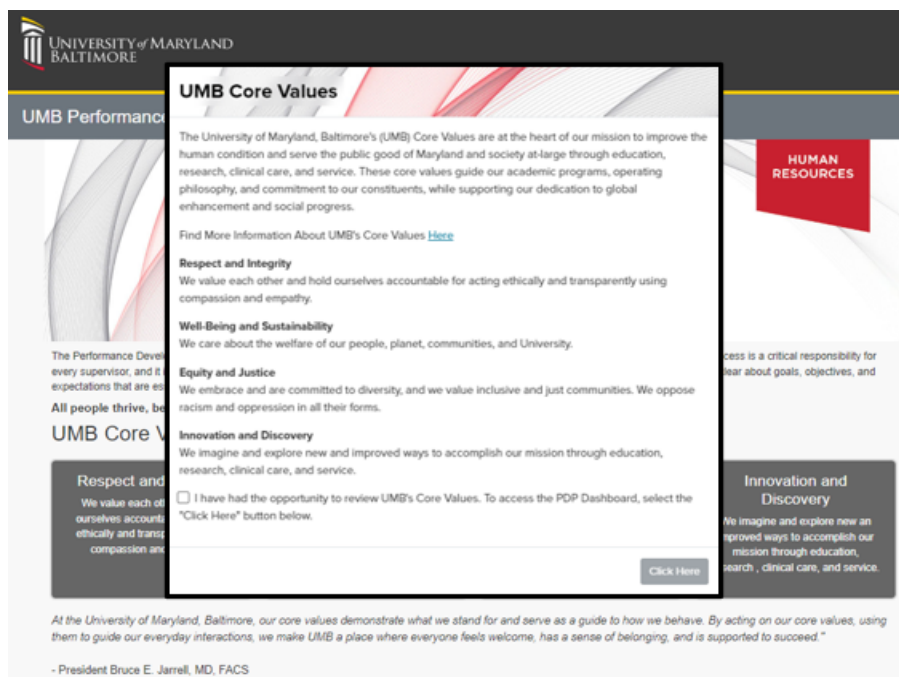
- Tools and resources will be available at the HRS-ELR website [UMB Performance Management Program](#) link.

Performance Management Program Platform

Using their UMB username and password to log-in, employees will be directed to the Landing Page of the Performance Management Platform.

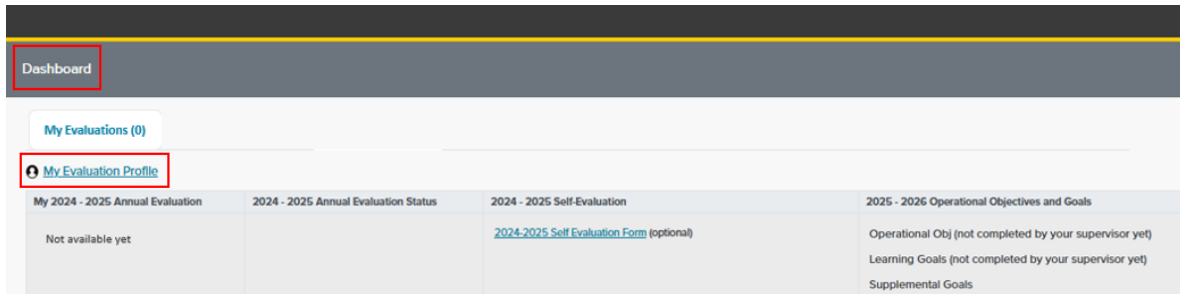


Employees will then have an opportunity to review the UMB Core Values. To access the portal, employees will check the box and select the “Click Here” button.

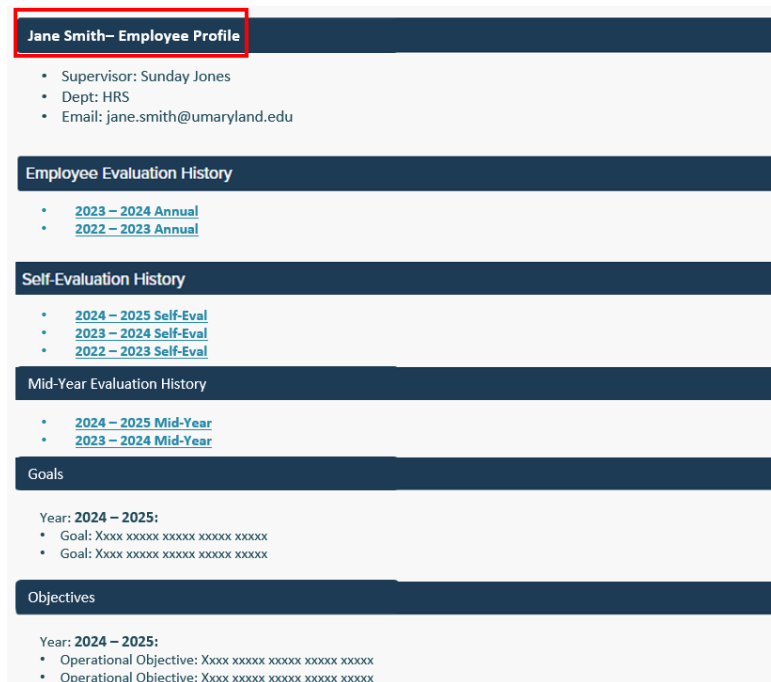


Accessing Historical PMP Documents

From the Dashboard, employees can access their prior PMP evaluations by selecting My Evaluation Profile.



Once selected, a new window will display showing available PMP documents starting with the 2022 – 2023 cycle.



Optional Self-Evaluation Form

Employees can complete a self-evaluation in the evaluation platform should they choose to do so. If an employee would like to complete a self-evaluation, they can access the evaluation through the My Evaluations tab.

To access the optional Self-Evaluation, employees will select the 2024 – 2025 Self-Evaluation link from their Dashboard.

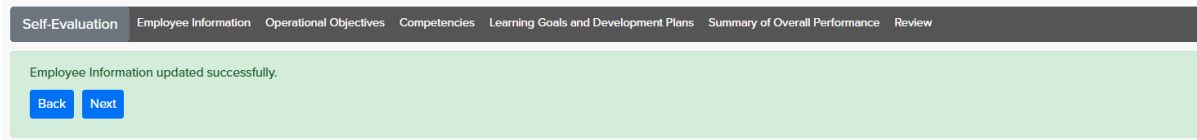
The screenshot shows a dashboard with a 'Dashboard' tab highlighted. Below it, there's a 'My Evaluations (0)' section. Under this section, there's a 'My Evaluation Profile' link highlighted. Below that, there's a table with four columns: 'My 2024 - 2025 Annual Evaluation', '2024 - 2025 Annual Evaluation Status', '2024 - 2025 Self-Evaluation', and '2025 - 2026 Operational Objectives and Goals'. The '2024 - 2025 Self-Evaluation' column has a link '2024-2025 Self Evaluation Form (optional)' highlighted.

Once selected, the employee will be directed to the evaluation and complete each screen making sure to select Save before moving forward.

The screenshot shows the 'Self-Evaluation' form with the 'Employee Information' tab selected. The form contains several fields: 'Employee Last Name' (Smith), 'Employee First Name' (Jane), 'Mi' (empty), 'Employee ID#' (012345), 'Job Title' (Specialist, Employee Rel Sr), 'School/Division' (dropdown menu), 'Department' (Human Resources), 'Do you supervise other employees?' (radio buttons for Yes/No), 'Type of Evaluation' (Annual), 'Period Covered' (2024 - 2025), 'Supervisor of Record: (Last Name, First Name)' (Jones, Sunday), 'Supervisor of Record EMPL ID' (012346), 'Supervisor of Record Email Address' (sunday.jones@umaryland.edu), and 'Supervisor of Record Ext' (410 706 7302). A 'Save Employee Information' button is at the bottom.

Fields that are greyed out will have pre-populated information. Areas that are not greyed-out will need to be completed.

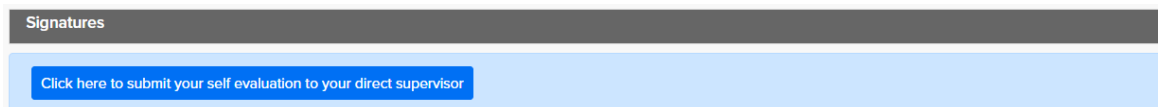
Employees will move throughout each screen by selecting the Back and Next buttons. Employees should select Save at the bottom of each screen before moving on to the next screen.



The screenshot shows a navigation bar at the top with the following tabs: Self-Evaluation, Employee Information, Operational Objectives, Competencies, Learning Goals and Development Plans, Summary of Overall Performance, and Review. Below the navigation bar, a green message box states "Employee Information updated successfully." At the bottom of the message box are two buttons: "Back" and "Next".

NOTE – Operational Objectives and Learning Goals that were created with their Supervisor during the Planning Phase and entered into the electronic platform will auto-populate on the respective Operational Objectives and Learning Goals screens. Employees should review the auto-populated content to ensure the accuracy and familiarity with the content.

Once completed the self-evaluation, employees will review and submit.

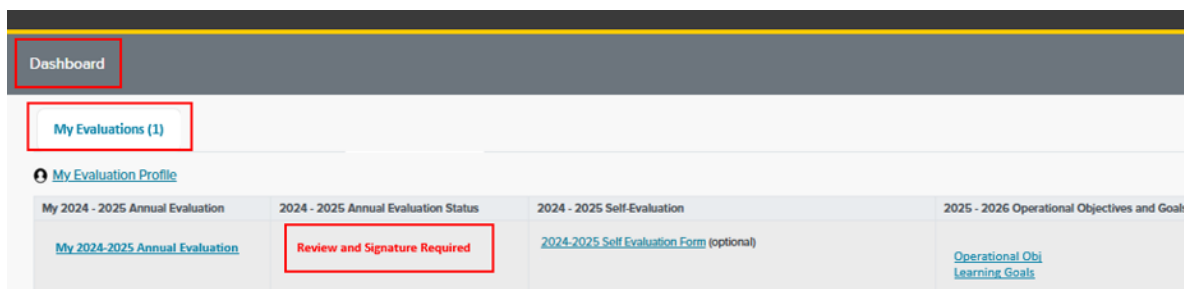


The screenshot shows a section titled "Signatures". Below the title is a blue button that reads "Click here to submit your self evaluation to your direct supervisor".

Submitted self-evaluations will be available for the supervisor to review.

Performance Evaluation Form

To access their evaluation, employees will select the Dashboard link from the Landing Page.



The screenshot shows a dashboard with a "Dashboard" link highlighted in a red box. Below it is a "My Evaluations (1)" link, also highlighted in a red box. Under "My Evaluations (1)" is a "My Evaluation Profile" link. Below the profile link is a table with four columns: "My 2024 - 2025 Annual Evaluation", "2024 - 2025 Annual Evaluation Status", "2024 - 2025 Self-Evaluation", and "2025 - 2026 Operational Objectives and Goals". The first column contains a link "My 2024-2025 Annual Evaluation". The second column contains a link "Review and Signature Required" highlighted in a red box. The third column contains a link "2024-2025 Self Evaluation Form (optional)". The fourth column contains a link "Operational Obj Learning Goals".

From the Dashboard link, employees will select the My Evaluations tab to select their “My 2024 – 2025 Annual Evaluation” for review.

Once “My 2024 – 2025 Annual Evaluation” is selected, employees are directed to a new screen to review the evaluation completed by their supervisor and/or rating official.

Jane Smith

Employee Information Operational Objectives Competencies Learning Goals and Development Plans Summary of Overall Performance Review Print

Employees should be evaluated on performance from April 1, 2024 – March 31, 2025.

Please review the evaluation below.

Employee Information

Employee Last Name Smith	Employee First Name Jane	MI	Employee ID# 012334
Job Title Specialist, Employee Labor Rel	School/Division Administration and Finance	Department HRS	
Does this employee supervise other employees? ☒ Yes ☐ No	Type of Evaluation Annual	Period Covered 2023	
Supervisor of Record: (Last Name, First Name) ¹ Sunday Jones	Supervisor of Record EMPL ID 012346	Supervisor of Record Email Address sunday.jones@umaryland.edu	Supervisor of Record Ext 410 706 7302
Is there a rating official other than the supervisor of record? ¹ ☒ Yes ☐ No			
Rating official: Lisset Escobar	Rating official EMPL ID 012347	Rating Official's Email Address lisset.escobar@umaryland.edu	Rating Official's Ext 410-706-1470

Operational Objectives

Objective: Teambuilding

Rating: ☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Although Jane completes her day-to-day duties while also assisting her team as needed, there are areas of opportunity that Jane can improve on including xxxxx, xxxxx, and xx. During this evaluation cycle, we have discussed this need for improvement on multiple occasions including our weekly 1-1 meetings on November 11, 2023, and January 6, 2024. xxxxx xxxxx xxxxx xxxxx xxx.

Supervisor Objectives

A. Interact effectively and maintain positive relationships with peers, subordinates and customers

Rating: ☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments:

Jane interacts effectively and in a positive manner with her staff as well as with all colleagues/co-workers and others throughout campus. She strives to provide a positive environment where all are welcome. Jane is the first to volunteer to assist her colleagues with trainings and understanding new items. I can always count on Jane to go above and beyond.

B. Use appropriate resources to make decisions and provide information and feedback in a timely manner

Rating: ☐ Outstanding ☒ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments:

Jane uses all applicable resources when making decisions and always provides feedback or other information in a timely manner. Jane has proactively created standard operating procedures to be shared amongst her team. Jane's budget review resulted in a surplus of 50K this year.

Competencies

Basic work factors: Quality of work, quantity of work and timeliness

Rating: ☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments:

Jane's work is always delivered by established deadlines. The quality of her work is consistent as she always meets self expectations.

Employees should be evaluated from April 1, 2024 – March 31, 2025.

Please review the evaluation below.

Learning Goals and Development

Learning goal/development activity:

Activity Category	Activity:
Customer Focus	By February 3, 2024, Jane will create a presentation on Employee Investigations and train three of her assigned customer groups.
	1. ABC.
	2. DEF.

Rating: ☒ Met ☐ In-Process ☐ Not Met ☐ Not Applicable

Summary of Overall Performance

Overall Rating and Comments:

Overall Rating: ☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments:

Jane did a great job this cycle.

- You did this.
- You did this.
- You did the other thing.
- And you did it well.

Signatures

Jane Smith (Employee):

Employee signature: My signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.

Comments

Type Your Name (Employee Signature) Today's Date

04/15/2025

Sign and Submit My Evaluation

Employee signature: my signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.

Employee Comments:

Employee Name: Jane Smith	Employee Signature: <i>Jane Smith</i>	Employee Title: Specialist, Employee Rel Sr	Date:
Supervisor of Record Name: Sunday Jones	Supervisor of Record Signature: <i>Sunday Jones</i>	Supervisor of Record Title: Dir, Employee/Labor Rel	Date: 04/07/2025
Other Rating Official: Lisbet Escobar	Other Rating Official Signature: <i>Lisbet Escobar</i>	Other Rating Official Title: Administrator, EE Rel/Lv Mgmt	Date: 04/09/2025
2nd Level Reviewer Name: Sandra Jessee	2nd Level Reviewer Signature: <i>Sandra Jessee</i>	2nd Level Reviewer Title: Manager, Employee/Labor Rel	Date: 04/10/2025

Employee Signature: My signature below is to verify that I have reviewed the performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply agreement or disagreement.

Employees should receive the evaluation at least 3 days prior to the scheduled review meeting with their supervisor to allow time to formulate any comments and/or questions.

NOTE: Employees are able to sign the evaluation once they receive it for review, however they may choose to wait to sign until after the evaluation meeting with the supervisor.

During this evaluation meeting, the supervisor should review and consider any employee comments and make changes as necessary. While supervisors should engage in conversation and consider the employee perspective, they are not required to change their ratings.

Signatures

Jane Smith (Employee):

Employee signature: My signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.

Comments

This has been a great year full of many accomplishments. I look forward to the next!

Type Your Name (Employee Signature) Today's Date

Jane Smith 4/30/2025

Sign and Submit My Evaluation

What My Signature Means

Signing the evaluation does not imply that the employee agrees, but indicates they reviewed the evaluation. If an employee disagrees with the evaluation, it is recommended that they enter a comment about their disagreement and sign that they have received the evaluation.

NOTE - Once the employee electronically signs the evaluation, the evaluation is submitted. No changes can be made to the evaluation after this point.

Dashboard			
My Evaluations (0)			
My Evaluation Profile			
My 2024 - 2025 Annual Evaluation	2024 - 2025 Annual Evaluation Status	2024 - 2025 Self-Evaluation	2025 - 2026 Operational Objectives and Goals
My 2024-2025 Annual Evaluation	Reviewed and Signed	2024-2025 Self Evaluation Form	Operational Obj Learning Goals

Once signed, the My Evaluations tab notates a (0) indicating the employee has no outstanding items to complete. Note that once the employee signs off on the evaluation, the status will change. The 2024 Annual Evaluation Status now reflects “Reviewed and Signed”.

Future Review

Employees can log into the Performance Management Platform at any time in the future to access their evaluation(s) for review.

Operational Objectives and Learning Goals

After the evaluation phase ends, supervisors should initiate the Planning Phase with their employees. During the Planning Phase, supervisors should meet with their employees to discuss operational objectives and set learning goals to achieve during the plan cycle.

To review established operational objectives and learning goals, employees will select the “Operational Obj” and “Learning Goals” links from the dashboard.

Dashboard			
My Evaluations (0)			
My Evaluation Profile			
My 2024 - 2025 Annual Evaluation	2024 - 2025 Annual Evaluation Status	2024 - 2025 Self-Evaluation	2025 - 2026 Operational Objectives and Goals
My 2024-2025 Annual Evaluation	Reviewed and Signed	2024-2025 Self Evaluation Form	Operational Obj Learning Goals

Employees can confirm they were made aware and received a copy of the established Operational Objectives and Learning Goals by signing off on the respective screens.