Non-Instructional Staff
Electronic Supplemental Review Guide

Introduction

A supplemental review provides feedback from colleagues, students, community partners, and others to a staff member for a holistic view of their performance. In accordance with the UW-Stevens Point Performance Management Policy, all on-going non-instructional staff (Academic Staff and University Staff) are expected to complete a supplemental review during their 2nd and 5th years of their current title.

Timeline

Supplemental reviews should be completed at the same time the 2nd and 5th annual performance review are completed. An annual and supplemental review tracking document is provided to supervisors on an annual basis (at minimum). A supplemental review timeline for those due within a particular calendar is available on the Performance Management webpage.

Individuals up for promotion (as an Academic Staff member within a promotional series), must complete a supplemental review prior to the date in which the promotion packet is due. This process is separate from the performance review process, please refer to the Career Development webpage for the promotion information.

Timeline Examples

Reference the below examples, *if* the performance review is completed in a month that is **not** based on the staff member's hire/anniversary date.

Example 1:
- Staff member hired April 2018; 2nd year supplemental review is considered due by/roughly April 2020
- The department normally completes performance reviews in May
- New staff member has an initial review completed May 2019
- In May 2020, the supplemental review is conducted to ensure it is assessed with the annual review and submitted by the supplemental review "due date"

Example 2:
- Staff member hired April 2018; 2nd year supplemental review is considered due by/roughly April 2020
- The department normally completes performance reviews in October
- New staff member should have a review done in October 2018 to be aligned with department reviews and not wait almost 2 years to have a review
- In October 2019, the supplemental review is conducted to ensure it is assessed with the annual review and submitted by the supplemental review "due date"

Prepare for the Survey

Complete the following items prior to creating the survey.

The employee and supervisor, collaboratively:

❑ Obtain the most current position description in Microsoft Word or PDF
❑ Create an introductory communication to the survey recipients (see Sample Introductory Communication)
❑ Create a list of questions for the survey
  o The survey system has a large bank of questions to review/choose
    ▪ There are two questions the system populates; no action is needed to ensure they are included:
      • What are this individual's strengths in performing the duties in the job description?
      • What suggestions can you make for improvement in the individual's job performance?
  o Survey Sample is available on the Performance Management webpage
  o Use questions which are relevant to the position
  o Dean/Directors and Executive Leadership: Use the prepopulated leadership questions in the survey system
  o Best practice: Ask a maximum of 10-15 quality questions total
❑ Create a list of survey recipients
  o Choose at least 15 individuals who can assess how the employee is carrying out day-to-day responsibilities of their job description
    ▪ Include the employee and supervisor in the list of recipients
  o Document the recipients' email addresses in an electronic document (ex: Word)
    ▪ Use the correct format separated by a comma and a space:
      • jdoe@uwsp.edu, msmith@uwsp.edu, bjones@hotmail.com
  o Include students and/or individuals off campus as appropriate
❑ Identify a one to two-week time period for recipients to complete the survey

Sample Introductory Communication

Subject: (Reviewee's name) Supplemental Review Request

You have been selected as a person who has knowledge of (Reviewee's name) and their work habits. Please take a few moments to complete the electronic supplemental survey by (Date).

Your comments will be confidential and will be reported in aggregate with other reviewers. Your comments will assist in providing critical feedback to (Reviewee's name) about their performance within their role as (Job title).

I thank you in advance for your participation in this process.

(Signature information)

Self-Assessment and Supervisor Assessment

The employee and supervisor also complete the survey. Ensure the employee and supervisor emails are included in the created email listing.

Access the Review Online

To gain access to the online review set up, go to https://asreview.uwsp.edu.

1. Depending on the browser/settings, you may be prompted to log into the system.

   a. Enter your credentials. Click **OK**.

If this is the first time you are creating a supplemental review, the window displays:

Supplemental Review Administration
Create New Supplemental Review

If you completed a review previously or have a survey in progress to edit, the window displays something similar to:
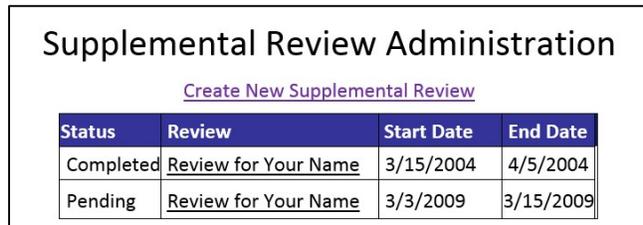
Supplemental Review Administration
Create New Supplemental Review

Status	Review	Start Date	End Date
Completed	Review for Your Name	3/15/2004	4/5/2004
Pending	Review for Your Name	3/3/2009	3/15/2009

2. Click **Create New Supplemental Review** or click on **Review for "Your Name"** to review a completed survey or edit a pending survey.

The Supplemental Review Administration Page displays.
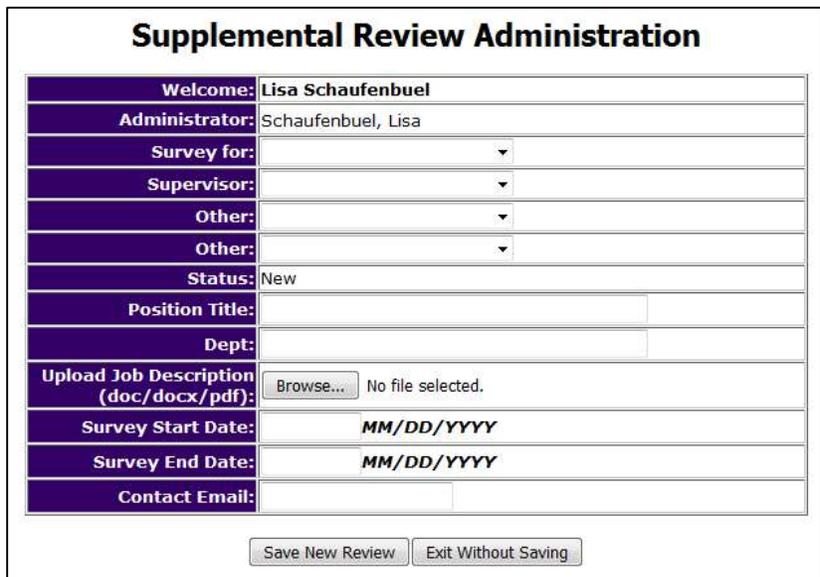
Supplemental Review Administration

Welcome:	Lisa Schaufenbuel
Administrator:	Schaufenbuel, Lisa
Survey for:	
Supervisor:	
Other:	
Other:	
Status:	New
Position Title:	
Dept:	
Upload Job Description (doc/docx/pdf):	Browse... No file selected.
Survey Start Date:	MM/DD/YYYY
Survey End Date:	MM/DD/YYYY
Contact Email:	

Save New Review   Exit Without Saving

Supplemental Review Administration Page

Below are the descriptions for each field. Some fields may be pre-populated*.

Choose from the drop-downs or enter the correct information into the fields to complete the form.

- **Administrator**: Name of the person logged into the system (may be the department assistant [or other delegated administrator for the survey], supervisor, or employee)

- **Survey for:** Name of the individual for review
  - Choose the appropriate employee name from the drop-down

- **Supervisor**: Select the supervisor's name of the employee being reviewed
  - Choose the appropriate supervisor from the drop-down

Supplemental Review Administration

Welcome:	Lisa Schaufenbuel
Administrator:	Schaufenbuel, Lisa
Survey for:	▼
Supervisor:	▼
Other:	▼
Other:	▼
Status:	New
Position Title:	
Dept:	
Upload Job Description (doc/docx/pdf):	Browse... No file selected.
Survey Start Date:	MM/DD/YYYY
Survey End Date:	MM/DD/YYYY
Contact Email:	

Save New Review   Exit Without Saving

- **Other**: (Two fields) Name(s) of other individual(s) who should have edit access to the survey; i.e. name of the Supervisor, Department Assistant, Program Manager, Office Manager, etc.

- **Position Title**: Position title of the individual being reviewed
- **Department**: Department name of the individual being reviewed
- **Upload Job Description**:

Upload Job Description (doc/docx/pdf): Browse...

  a. Click **Browse**.

  b. Select the job description file. The file may be in PDF or Word .doc format

     i. To replace a file, repeat the above steps.

- **Survey Start Date**: Date in which the survey is sent to its recipients
  - Enter a date in the future to ensure enough time to create the survey. Once the survey is sent, no editing can be made

- **Survey End Date**: Date in which the survey can no longer be completed by recipients
  - Provide at least 7 days (including the start date) for recipients to complete the survey and no more than 14 days
  - Most recipients complete a survey within the first 3-4 days of receiving it
  - Respondents who have not completed the survey will be sent a reminder email when 24 hours remain to take the survey

The survey will lock once the start date entered occurs.

- **Contact email**: The email address (not of the person being evaluated) that respondents can contact if they have questions about the process

- **Save New Review/Save Changes**: Click to save the review

- **Exit Without Saving:** Click to exit without saving the review

The Supplemental Review Administration window refreshes.

*Refer to the last page of this document for technical assistance if any of the pre-populated fields are inaccurate.

Create the Survey

1. Click **Review for "Your Name"**.

The Supplemental Review Administration page refreshes.

2. Click **Create/Edit Survey**.

The Supplemental Review Setup Form window displays.

Basic Review Information is the survey's basic information.

Mandatory Questions lists the questions that automatically appear on all supplemental review surveys.

SUPPLEMENTAL REVIEW SETUP FORM

BASIC REVIEW INFORMATION

Name	Lisa Schaufenbuel
Position Title	Associate Director
Department / Office	Human Resources-UWSP
Review Start Date	Wednesday, October 12, 2016
Review End Date	Thursday, October 20, 2016

MANDATORY QUESTIONS

The following questions are mandatory and will be included in your supplemental review:

1. "What are this individual's strengths in performing the duties in the job description?"

2. "What suggestions can you make for improvement in the individual's job performance?"

3. There is a question asking the reviewer to assess how familiar he or she is with your job performance.

4. **Directors must** include all of the general questions listed in the next section, "General Questions."

In all of the following questions, the reviewer is asked to assess you on a scale ranging from "Strongly Agree" to "Strongly Disagree." The reviewer may also indicate that they have "No Opinion."

To return to the previous page without saving, click **Return to the Review Setup Page** at the bottom of the window.

[Return To Review Setup Page]

Questions are categorized by pre-populated header statements.

3. To edit or remove the heading, click in the field and type a new word or leave blank.

General **STATEMENTS**

Each category has pre-populated questions.

4. To remove a pre-populated question, click the checkbox associated with that question.

5. To add a new question to a category, type the question into the field and check the checkbox.

Mark all of the statements you wish to include in your review.

- ☑ This individual is competent in dealing with personnel matters.
- ☑ This individual provides strong leadership for the unit.
- ☑ This individual communicates information accurately and clearly.
- ☑ This individual performs administrative tasks efficiently.
- ☑ This individual in general, is an effective administrator.
- ☐
- ☐
- ☐

6. Each section has an Include a box for comments regarding this area. For the most effective feedback, check the box at the end of each section.

- ☐ Include a box for comments regarding this area.

7. General Statements:
   a. The checked questions must be asked on surveys for individuals in a Director level position and above.

8. Leadership, Communication, Administration, Personnel, and Miscellaneous Statements
   a. Edit as appropriate.

9. Email Addresses:
   a. Enter the email list.

   b. Use the correct email format and separate each email address by a comma and a space.

EMAIL ADDRESSES

Type the email addresses of who the supplemental review questionnaire should be sent to. Separate email addresses by commas and be sure to type in the whole email address (e.g., "jsmith@uwsp.edu" *not* just "jsmith").

[Submit This Form / Preview Assessment]

[Return To Review Setup Page]

💡 Copy and paste the email addresses from Outlook into Word. Separate the email addresses with a comma and a space. Then copy all of the email addresses into the Supplemental Survey system. Do not use a distribution list!

10. Click **Submit This Form / Preview Assessment.**

The Your Entries Have Been Saved window displays.

11. Carefully read the instructions on the page and review the information.

   a. Email errors are indicated with a red error message.

   📒 Off-campus addresses will always identify as an incorrect entry. Ensure the addresses are correct.

   b. Click **Go Back to Edit Questions** to return to the previous page to edit the survey information.

   c. The survey can be edited until 12:00 a.m. of the day the survey is scheduled to be sent.

YOUR ENTRIES HAVE BEEN SAVED

Your review information has been saved. Please read over this page carefully. If something does not look right, hit the back arrow of your browser and make changes. If everything looks OK, you're done! You can go ahead and close your web browser.

EMAIL ADDRESSES

Your invitation email will be sent to the following email addresses. Please look at them carefully and look for any errors. Correct email addresses are critical to this processes. If you spot an incorrect address, hit the back arrow, correct it, and resubmit that page.

INVITATION EMAIL PREVIEW

This is approximately what the email that gets mailed to your survey recipients will look like. Check to make sure the wording of the first paragraph sounds OK. If not, hit the back arrow and change the wording of your position title and/or department.

From: asreview@uwsp.edu
Subject: Supplemental Review for Lisa Schaufenbuel

Lisa Schaufenbuel, Associate Director for Human Resources-UWSP , is undergoing a supplemental review. Your name has been given as a colleague who has knowledge of this position and this person's performance.

Below is a link to a job description for Lisa Schaufenbuel. Please review this carefully and evaluate the individual's performance in relationship to this description.
   Click here for the job description.

Below is the address for the online supplemental review evaluation form. You may access this link as many times as needed to complete the survey. When you submit your final feedback, the address will no longer work for you. You may submit your feedback only once. (Please report any technical problems to sgile@uwsp.edu and all other questions to).
   Click here to take the survey.

Your participation in this process is greatly appreciated. Please complete the evaluation by Thursday, October 20, 2016. The survey will take about 10 minutes to complete.

This survey is web based and responses are confidential. There will be no links between an author's name or email address and their survey responses.

[Go Back To Edit Questions]

Survey Results

For assistance analyzing the data, contact Human Resources.

Human Resources does not have access to supplemental review results through the system.

Gather the Results

Survey results are anonymous for individuals completing the survey in the electronic system. Results are tabulated and emailed in report form to the supervisor listed on the review.

Any individual may request to complete a survey for an employee and should work with the supervisor or department assistant to complete the survey.
- If the individual is outside of the initial recipient list, the requestors name is shared with the employee (by supervisor or department assistant)
- If the request is outside of the initial electronic survey, the supervisor or department assistant sends a manual copy of the survey to the requestor
  - The completed survey is returned to the supervisor
  - The requestor's survey results may be tabulated with the other survey results
    - When this is not possible and at the discretion of the supervisor, the requestor's complete feedback may be shared with the employee

Review

The supervisor reviews the results and looks for themes. It is up to the supervisor's discretion to provide:
- A summary of themes *and/or*
- The tabulated results from the system to share directly with the employee

The employee may request to receive the full results. If the employee receives a copy of the full supplemental review results, they should also look for themes

Document

The supervisor (and employee, if they receive the full results) should document the themes, strengths, growth, and support areas within their evaluation portions of the annual performance review.

If using the Competency model, add the appropriate information to the applicable competency(ies).

If using the Goals model, add to a goal's results if applicable, otherwise, add it to the additional sections within the model template.

Discuss

During the performance review meeting, discuss the supplemental review themes, identified strengths, etc. as applicable.

Submit/Include with the Performance Review

Include important supplemental review information within the annual performance review after completion. This may include themes of positive or areas of development feedback received. Include actions items or goals to develop skills further and/or maintain performance.

The supplemental review itself may be submitted with the annual review. It is not required when themes and reflection are included within the annual performance review.

Additional Resources and Contacts

Human Resources

715-346-2606
hr@uwsp.edu

Electronic Supplemental Review Technical Assistance

Jack George
Information Technology
715-346-3789
jgeorge@uwsp.edu