Division of Research – Personnel Management Calendar

(Revised 9/19/24)

To ensure that compensation and classification changes are processed in a timely manner and do not conflict with the budget and merit cycle, please refer to the dates below for requesting personnel actions and maintaining the performance management process. This does not apply to student workers, graduate assistants, or temporary employees.

Preferred Deadline	Action
Sept 15 – April 1	**Requests for promotions or compensation increases are submitted for Oct 1 – May 31** • Requests can be effective Oct 1 through May 31. • Exceptions outside these dates will be considered on a case-by-case basis by the VPR. • Follow established HR processes and procedures for requests.
Jan 1 – Feb 15	**Requests for Out-of-Cycle merit are submitted** • Out-of-cycle merit requests can be effective March 1. • Exceptions outside a March 1 eff date will be considered on a case-by-case basis by the VPR. • Follow the established HR process using the Compensation Change Form.
Feb 1 – Mar 31	**Supervisors Prepare for Annual Performance Evaluation Process** • Ensure all position descriptions are accurate in preparation for the evaluation process. • Recommend *Performance Management Best Practices* in TrainTraq, #2112082. • HR team can provide supervisor training on evaluation ratings and processes if requested.
April 16	**Employee Self-Evaluation** • On April 1, employees receive a task in their Workday inbox to complete the self-evaluation. • Managers can decide whether or not they want their employees to complete the self-evaluation. Here are self-evaluation instructions for regular and attachment-only templates. • Forms are available for researchers and applicable staff who have the attachment-only template. • Although completing the self-evaluation is optional, the **employee must submit** the self-evaluation (even if leaving it blank) to initiate the subsequent steps.
April 30	**Manager Drafts Evaluation** • Managers will receive an inbox task to "Complete Manager Evaluation." • Here are instructions for completing the regular and attachment-only evaluations. • For the attachment-only templates, use these forms for researchers and applicable staff. **TIP:** Understand the Competencies and Ratings before completing performance reviews. **IMPORTANT: DO NOT SUBMIT** the evaluation until you have a discussion with the employee; use of remote technology such as Zoom is allowable.
May 16 **Final/Hard Deadline** May 31	**Performance Evaluation Meetings and Acknowledgements Completed** 1. Manager and employee meet to discuss the evaluation. 2. Manager finalizes and submits evaluation in Workday. 3. Employee acknowledges evaluation in Workday. 4. Manager acknowledges the employee review in Workday. **PLEASE NOTE:** More time will be needed to complete evaluations with a rating of "Partially Meets" or "Does Not Meet," as these must also route to the next-level supervisor.

June – July 31	**Goals entered for next evaluation cycle** • These are the goals for the upcoming evaluation period. Goals should have a due date of March 31 of the following year. • Managers or employees can enter goals.
June/July	**Merit spreadsheets distributed and completed by deadline established from budget office.** • Merit increases will be effective September 1. • No other personnel or compensation actions allowed during this time; exceptions must be approved by the VPR.
August	**End of Year Reminders** • Update External Employment requests. • Review and update Alternate Work Location and/or Flexible Schedule requests. • Submit FMLA Recertifications. • Review and update contact information in Workday.