ePerformance
for Managers and Supervisors

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Introductions

Instructor

- Name
- UCPath role
- Functional experience

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Training Logistics

Safety & Housekeeping

- Breaks

Classroom Etiquette

- Please silence cell phones

- No email or web surfing

- Return from breaks on time

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Questions & Parking Lot

Questions

- If you have a burning question, please stop and ask

- Let the instructors provide the answers

Parking Lot

- Questions we can't answer right away

- Questions requiring a lengthy response

- Questions beyond the scope of this training

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Course Agenda

- 1: ePerformance Overview
- 2: Probationary Evaluations
- 3: Annual Evaluations

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Course Objectives

By the end of this course, you should be able to:

- Describe the ePerformance module of UCPath

- Describe how to create and complete performance criteria

- Describe the business process around probationary evaluations

- Describe the business process around annual evaluations

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EPERFORMANCE OVERVIEW
MODULE 1

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Module Objectives

1: ePerformance Overview

2: Probationary Evaluations

3: Annual Evaluations

At the end of this module you should be able to do the following:

- Describe the ePerformance module of UCPath

- Describe the two document types used in ePerformance

- Explain the business process around probationary performance evaluations

- Explain the business process around annual performance evaluations

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What is ePerformance?

- ePerformance is the performance management module in UCPath

- ePerformance replaces appraisals.ucsc.edu

- ePerformance will be used for the creation and completion of both annual and probationary performance evaluations
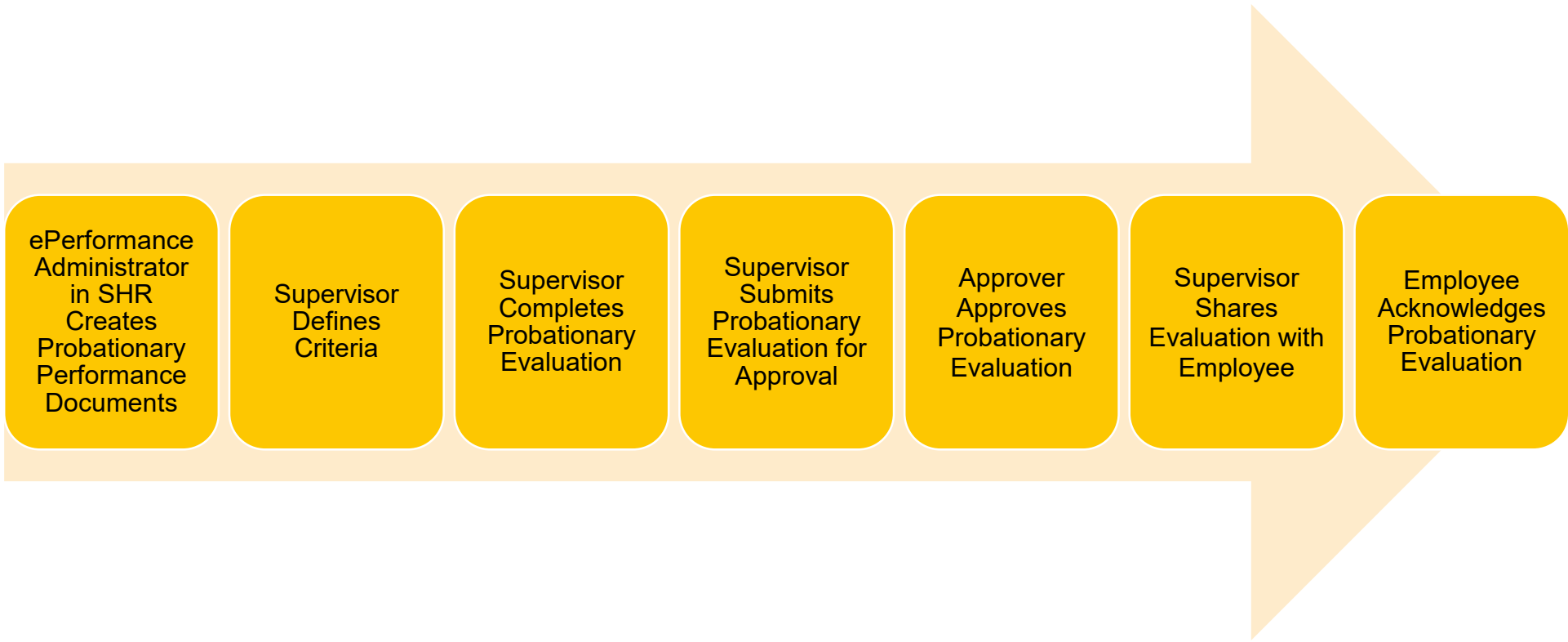
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Document Types

- **Probationary Performance Evaluations** are used to evaluate a new employee's performance during the defined probationary period
  - Completed once, unless there is break in service, usually within the first six months of employment

- **Annual Performance Evaluations** are used to rate an employee's performance against specific performance criteria and goals
  - Completed once a year

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Probationary Evaluations

- ePerformance administrator (in ELR) creates probationary evaluations at the beginning of the probationary period

- Probationary period evaluations should be completed for **career and partial-year career** employees during their probationary period

- Student, contract, limited, per diem, MSP, and SMG employees do not serve a probationary period

- Academic evaluations are not completed using ePerformance

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ePerformance Process Flows: Probationary Evaluations

ePerformance Administrator in SHR Creates Probationary Performance Documents → Supervisor Defines Criteria → Supervisor Completes Probationary Evaluation → Supervisor Submits Probationary Evaluation for Approval → Approver Approves Probationary Evaluation → Supervisor Shares Evaluation with Employee → Employee Acknowledges Probationary Evaluation

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What's New: Probationary Period Evaluations

From	To
Probationary evaluation is created by the supervisor.	Probationary evaluation is created by **the ePerformance administrator in ELR**.
Divisional Administrator manually creates signature hierarchy in the appraisal system.	UCPath automatically creates the signature relationships between supervisor and employee based on position hierarchy.
Once evaluation is created, daily reminders are sent until completion of evaluation.	System-generated daily reminders will no longer be sent.
System notifies ER Analysts if an Unsatisfactory or Improvement Needed overall rating has been provided by the supervisor, and ER Analyst must review before the evaluation is sent to the employee for signature.	Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.

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Annual Performance Evaluations

- Divisional ePerformance administrators create evaluations for employees within their division at the beginning of the performance cycle
  - Can be done for a group or individual

- Annual evaluations are required for active **career** and **partial-year career** employees

- Annual evaluations are required for **contract** employees only if specified in the contract

- Academic, student, limited, and per diem employees are not required nor expected to participate in the ePerformance process

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ePerformance Process Flows: Annual Evaluations

Divisional ePerformance Administrator Creates Annual Performance Documents → Supervisor Defines Criteria → Participants are Nominated → Employee Completes Self Evaluation → Supervisor Reviews Self Evaluations and Participant Evaluations → Supervisor Completes Evaluation → Supervisor Shares Evaluation with Employee → Employee Acknowledges Evaluation → Supervisor Submits Evaluation for Approval → Approver Approves Evaluation

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What's New: Annual Performance Evaluations

From	To
Annual performance evaluation is created by the supervisor toward the end of the performance period.	Annual performance evaluation is created by the **ePerformance administrator at the divisional level** at the beginning of the performance period.
Divisional Administrator manually creates signature hierarchy in the appraisal system.	UCPath automatically creates the signature relationships between supervisor and employee based on position hierarchy.
Participant nomination functionality does not exist in current appraisal system.	Supervisors & employees can nominate people to participate in the employee's performance evaluation.
Once evaluation is created, daily reminders are sent until completion of evaluation.	System-generated daily reminders will no longer be sent.
System notifies ER Analysts if an Unsatisfactory or Improvement Needed overall rating has been provided by the supervisor, and ER Analyst must review before the evaluation is sent to the employee for signature.	Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.

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Differences between Annual and Probationary Evaluations

Probationary	Annual
ePerformance administrator in Staff Human Resources creates probationary performance documents.	**Divisional ePerformance administrator** creates annual performance documents for their division.
Probationary performance evaluation only has a Functions and a Common Standards tab.	Annual performance evaluation has Functions, Goals and Common Standards tabs.
There is no option to nominate a participant for probationary performance evaluations.	Supervisors & employees can nominate people to participate in the employee's annual performance evaluation.
Employee does not complete a self evaluation for probationary performance evaluations.	Employee completes a self evaluation for annual performance evaluations.
Probationary evaluation is first approved by the approver and then acknowledged by the employee.	Annual performance evaluation is first acknowledged by the employee and then approved by the approver.
Employee does not have an option to leave comments when acknowledging a probationary performance evaluation.	Employee has the option to leave comments when acknowledging an annual performance evaluation.

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About Low-Scoring Evaluations

- Supervisors **must** inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations.

- UCPath **will not** stop the supervisor from sending a low-scoring evaluation directly to the employee without ER Analyst review.

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Module 1 Quiz

- You now have the opportunity to assess your knowledge of the information presented in this module

- The questions and answers presented in this review help you to determine whether you remember and understand the important points

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Multiple Choice

Who creates probationary evaluations?

A. The supervisor

B. The divisional ePerformance Administrator

C. The ePerformance Administrator in SHR

D. None of the above

The ePerformance Administrator in SHR will create probationary evaluations and the divisional ePerformance Administrator will create annual evaluations.

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True or False

UCPath sends daily email reminders to supervisor and employee once a performance evaluation is created.

True

False

FALSE. UCPath sends **one** email to notify supervisors and employees that a performance evaluation has been created.

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Multiple Choice

If a supervisor intends to rate an employee's overall performance as anything less than a Met Expectations, what action must they take?

A. Delete the evaluation

B. Notify their supervisor

C. Notify their Employee Relations Analyst

D. Send a formal apology to the employee

Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.

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PROBATIONARY EVALUATIONS

MODULE 2

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Module Objectives

1: ePerformance Overview

2: Probationary Evaluations

3: Annual Evaluations

At the end of this module you should be able to do the following:

- Describe how to create and complete performance criteria

- Describe how to view, add, and edit Performance Notes

- Describe how to complete a probationary performance evaluation

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Probationary Evaluation – Supervisor Navigation

Probationary Evaluation – Supervisor Navigation

Supervisors can search and filter evaluation results from their employees' current evaluations

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

First Name | Last Name
Document Type | Document Status
Period Between | Department Set ID
Job Code | Department

Filter | Clear

Define Criteria

The Performance Process bar on the left shows supervisors where they are in the evaluation process
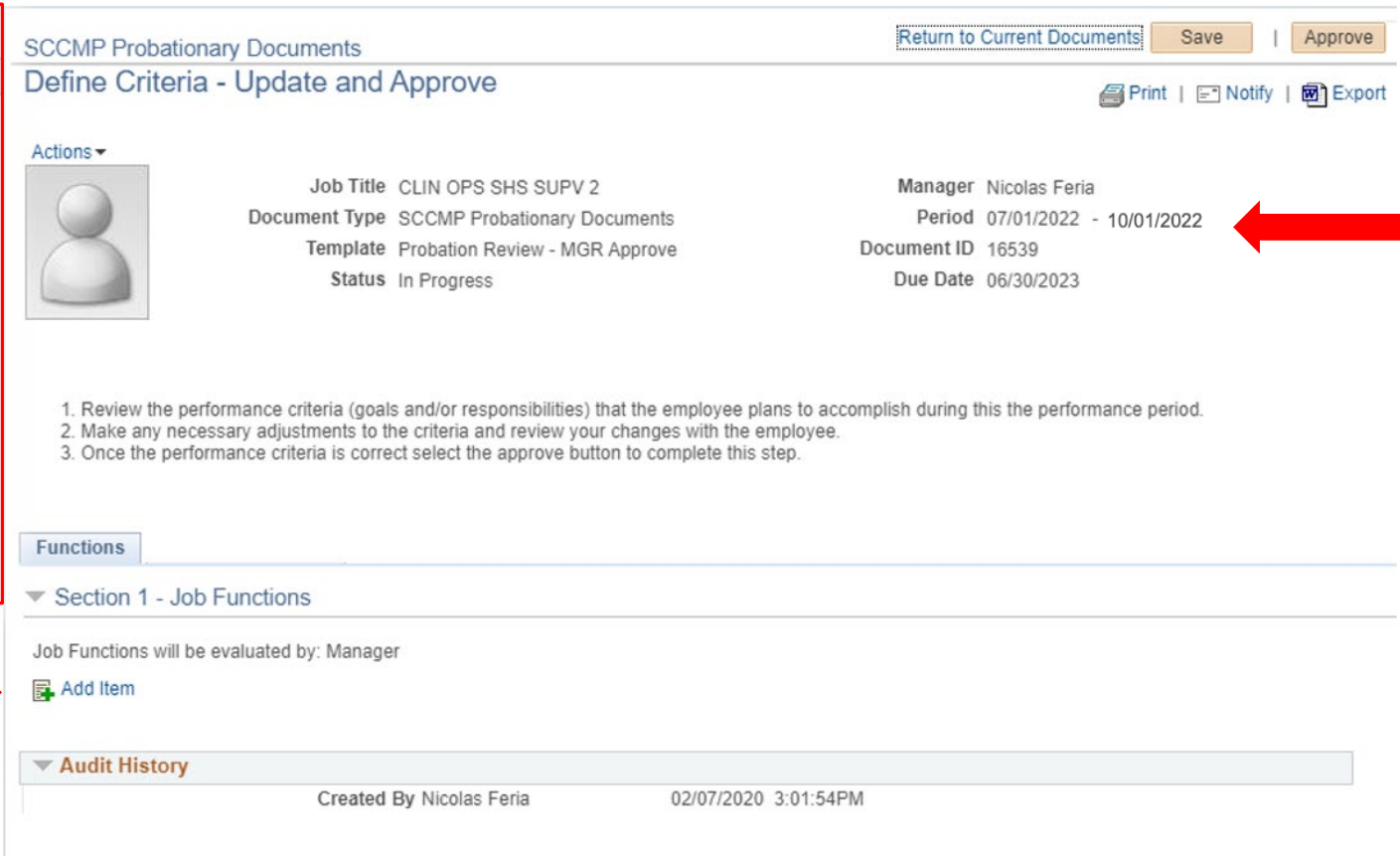
Supervisors can click **Add Item** to add to the Functions tab

At the top supervisors can see details about the document

Performance Process

Steps and Tasks

Kelly Sue DeConnick
SCCMP Probationary Documents
07/01/2022 - 10/01/2022   Overview

Define Criteria
Due Date   06/30/2023
  ● Update and Approve

Complete Manager Evaluation
Due Date   04/01/2023

SCCMP Probationary Documents

Return to Current Documents | Save | Approve

Define Criteria - Update and Approve

Print | Notify | Export

Actions ▾

Job Title CLIN OPS SHS SUPV 2
Document Type SCCMP Probationary Documents
Template Probation Review - MGR Approve
Status In Progress

Manager Nicolas Feria
Period 07/01/2022 - 10/01/2022
Document ID 16539
Due Date 06/30/2023

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Functions

▼ Section 1 - Job Functions

Job Functions will be evaluated by: Manager

Add Item

▼ Audit History

Created By Nicolas Feria   02/07/2020 3:01:54PM

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Define Criteria – Add Your Own Item

There are three ways to add criteria to a performance evaluation

Add your own item allows supervisors to write custom criteria

Add Item

- ⦿ Add your own Item
- ○ Copy item from my Documents
- ○ Copy Item from My Team's Documents

Next

Return

Titles are required for **Add your own items**

- Supervisors can add more details in the description section

Add Your Own Item

*Title: Process an average of fifty customer requests per day

Description

Process an average of fifty customer requests per day without error.

Add

Return

Define Criteria – Copy Item from My Documents

There are three ways to add criteria to a performance evaluation

Add Item

○ Add your own Item

◉ Copy item from my Documents

○ Copy Item from My Team's Documents

Next

Return

Copy item from my Documents allows supervisors to add an item from their current performance evaluation to their employee's performance evaluation

Supervisors can select one or more criteria from their performance evaluation to copy to their employee's performance evaluation

Performance Document

Copy from Manager Document

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Manager Document

Name	Nicolas Feria	**Document Type**	SCCANNUL
Section	Job Functions	**Content Type**	
Begin Date	07/01/2020	**End Date**	06/30/2021

Manager Job Functions   Personalize | Find | ⧉ | 🔢   First ◄ 1-2 of 2 ► Last

	Job Functions
☐	UC Path training
☐	Donut delivery

Select All   Deselect All

Copy   Cancel

UC SANTA CRUZ

Define Criteria – Copy Item from My Team's Documents

There are three ways to add criteria to a performance evaluation

Add Item

⦿ Add your own Item

⦿ Copy item from my Documents

⦾ Copy Item from My Team's Documents

Next

Return

Copy item from My Team's Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee's performance evaluation

Performance Document
Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Supervisors can search for a specific performance evaluation among their employees' evaluations

▼ **Filter Criteria**

First Name		Last Name
Document Type	▼	Document Status ▼
Period Between	-	

Filter   Clear

Select an evaluation

Performance Documents   Personalize | Find | 🔲 | 🔢   First ◀ 1 of 1 ▶ Last

Select	Name	Document Type	Document Status	Period Begin	Period End
Select	Kelly Sue DeConnick	SCCMP Probationary Documents	Define Criteria	03/01/2020	08/30/2020

Return

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Define Criteria – Copy Item from My Team's Documents

There are three ways to add criteria to a performance evaluation

Copy item from My Team's Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee's performance evaluation

Supervisors can select one or more criteria from their employee's performance evaluation to copy them to the current employee's performance evaluation

Add Item

○ Add your own Item

○ Copy item from my Documents

⊙ Copy Item from My Team's Documents

Next

Return

Performance Document

Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

Name	Kelly Sue DeConnick	**Document Type**	SCPROB
Section	Job Functions	**Content Type**	
Begin Date	03/01/2020	**End Date**	08/30/2020

Job Functions to be copied   Personalize | Find | ▣ | ▦   First ◁ 1-2 of 2 ▷ Last

	Job Functions
☐	Coordinate meeting schedules
☐	Budget management

Select All   Deselect All

Copy   Cancel

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Define Criteria

All criteria added display on the current tab in the order created with a timestamp at the bottom

Define Criteria

▼ **Process all customer requests in a timely fashion**

Description : Process all customer requests within one hour of receipt.

Created By Nicolas Feria   02/06/2020 10:38AM

There are three buttons available to supervisors in each item:

- Copy to Other Documents
- Edit
- Delete

Define Criteria – Copy to Other Documents
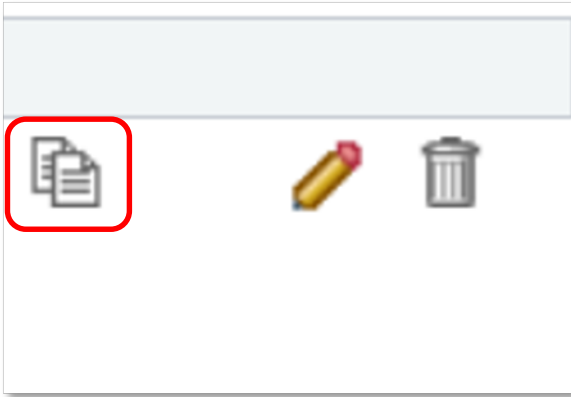
Copy to Other Documents allows the supervisor to copy the selected item to another performance evaluation

When selected, the supervisor will see a pop up message letting them know the item will be saved

Message

Your item, Coordinate meeting schedules, will be saved before continuing. (4601,388)

Select Ok to continue, or Cancel to return to the document without copying.

OK   Cancel

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Define Criteria – Copy to Other Documents

Copy to Other Documents allows the supervisor to copy the selected item to another performance evaluation

Below is a list of documents you manage which this item can be copied to. This list includes only documents where Evaluation Criteria is In Progress and have the same Document Type and Section as the document you are currently on.

To add or update the item -- **Coordinate meeting schedules** to one or more of these documents, select the checkbox next to the employee's name and select the Continue button. If the item already exists, the system will update the item on the document with the item details being copied.

Supervisors can select one or more performance evaluations that the item can be added to and then click **Continue**

Performance Documents		Personalize | Find | ⬚ | ▦	First ◀ 1 of 1 ▶ Last
Name	**Job Title**	**Period Begin**	**Period End**
☐ Karen Schloss	HR GENERALIST 5	03/01/2020	08/30/2020

Select All   Deselect All   Continue

Return
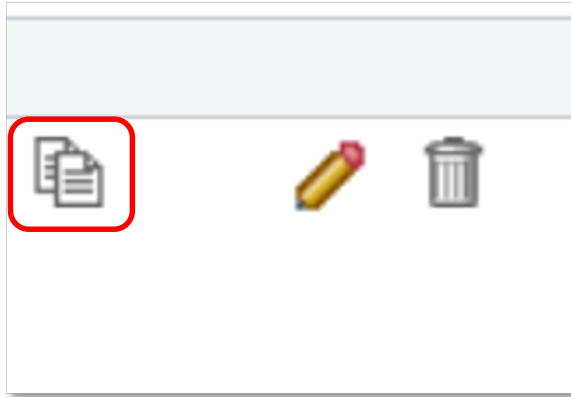
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Define Criteria – Copy to Other Documents

Copy to Other Documents allows the supervisor to copy the selected item to another performance evaluation

You have chosen to add the Item -- **Budget management** to the performance documents listed.
To confirm this assignment, select the Save button.

Performance Documents	Personalize	Find			First	1 of 1	Last	
Name	**Job Title**	**Period Begin**	**Period End**	
Karen Schloss	HR GENERALIST 5	03/01/2020	08/30/2020	

Supervisors confirm the action by clicking **Save**

Save

Return

Define Criteria – Edit
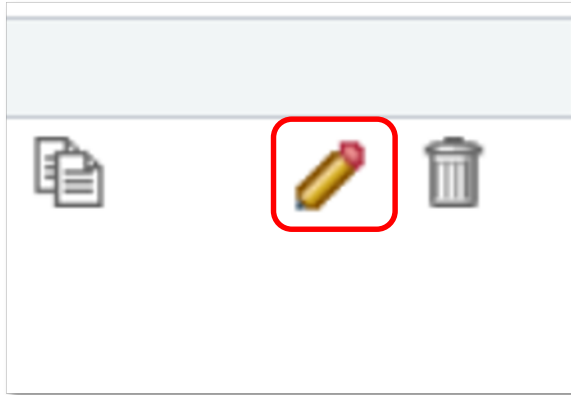
Supervisors can edit an existing item

Supervisors can make changes to both the title and the description of existing items

- Supervisors confirm their edits with the **Update** button

SCCMP Probationary Documents

Edit Item

*Title   Coordinate meeting schedules

Description

Coordinate department meeting schedule with little to no supervision

Update

Return

UC SANTA CRUZ

Define Criteria – Delete
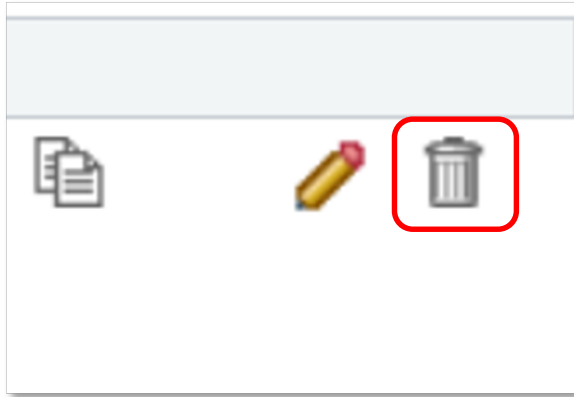
Supervisors can delete an existing item

SCCMP Probationary Documents

Delete Confirmation

? Are you sure you want to delete (Oversee department)?

Supervisors are prompted to confirm the deletion

Yes - Delete   No - Do Not Delete

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Define Criteria – Employee Interaction

- During the Define Criteria step, employees are able to add items to the evaluation, and to edit existing items

- When an employee adds a new item to an evaluation, their name will display at the bottom of that item following the words "Created By"

- When an employee edits an existing item in an evaluation, their name will display at the bottom of that item following the words "Last Modified By"

- Employees are able to delete items that they themselves added to the evaluation, but cannot delete items added by their supervisor

- It is up to the supervisor whether or not they would like their employee to add or edit items to the performance evaluation. When starting a performance evaluation, the supervisor should clearly communicate with their employee their expectations around employee involvement during the Define Criteria step

Process all customer requests in a timely fashion
Description : Process all customer requests within one hour of receipt.
Created By Nicolas Feria   02/06/2020 10:38AM

UC SANTA CRUZ
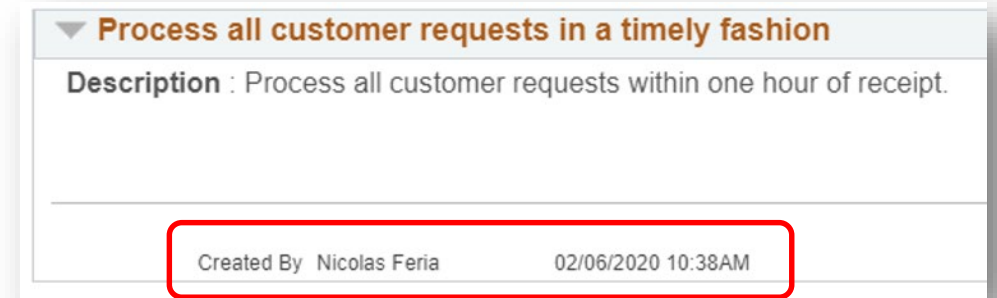
Define Criteria

Supervisors can save their progress…

…or approve the completed criteria

SCCMP Probationary Documents
Define Criteria - Update and App...

Re... ...ents   Save | Approve

Print | Notify | Export

Actions ▾

Job Title CLIN OPS SHS SUPV 2
Document Type SCCMP Probationary Documents
Template Probation Review - MGR Approve
Status In Progress

Manager Nicolas Feria
Period 07/01/2022 - 06/30/2023
Document ID 16539
Due Date 06/30/2023

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Functions

▼ Section 1 - Job Functions

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Reopen Previous Step

When a step or task in the Performance Process bar is completed, the icon next to that step or task will turn into a green checkmark

Refresh window

- Supervisors can reopen the previously completed step through the Performance Process bar

- Only the last completed step can be reopened

Performance Process

Steps and Tasks

Kelly Sue DeConnick
SCCMP Probationary Documents
03/01/2020 - 08/30/2020   Overview

Define Criteria
Due Date   08/30/2020
View

Reopen

Complete Manager Evaluation
Due Date   06/01/2020

Update and Submit

Pending Approval

Share with Employee

Pending Acknowledgement

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Performance Notes

- Performance Notes allows supervisors to document an employee's performance throughout the performance period

- As performance evaluations are created at the beginning of the performance period, supervisors can use Performance Notes throughout the performance period to document their employee's performance and progress

- Supervisors can then use these notes as reference when completing a performance evaluation

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Performance Notes

- Employees can also keep performance notes about themselves

- Performance notes are only visible to the author of the note

- Once the relevant performance evaluations is completed, supervisors should delete the associated performance notes

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Performance Notes - Navigation

Performance Notes

Supervisors can search for existing performance notes by employee ID and date range, or they can add a new note

Performance Notes

Instructions

Enter the Employee ID of the subject employee in the search criteria, then select the **Search** button. (This list can be filtered further by entering a "Starting Date").

New notes can be added and existing notes can be edited. To add a new note, select on the **Add New Note** button. To edit or access the details of an existing note, select on the note's subject.

Selection Criteria

*Employee ID 10343344 🔍 Kelly Sue DeConnick
Notes From [   ] 📅   Through [   ] 📅

[Search]   [Add a New Note]

There are no existing notes for the specified selection criteria.

Return to Performance Document

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Define Criteria – Performance Notes

- Performance Notes consist of a Subject and Note Text
- When viewing an existing performance note, supervisors can edit or add to the note

Performance Notes - Add/Update Notes

▶ Instructions

Selected Performance Note

Applications

Employee ID	10343344	Kelly Sue DeConnick	Created 02/06/2020 10:31AM
			Creator Nicolas Feria
			Last Update
			Updated By

Subject Cupcake club management

Note Text Kelly Sue has been extremely proactive in managing the cupcake club's expenses and revenue, providing unsolicited weekly reports and evidence-based directive suggestions.

Save

Return to Performance Note Selection

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Complete Manager Evaluation

In the **Complete Manager Evaluation** step, the supervisor will have the opportunity to rate and comment on the employee's performance for each of the previously defined criteria

The two evaluation fields for each item are
- **Manager Rating** and
- **Manager Comments**

Two new tabs
- **Common Standards**
- **Overall Summary**

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Complete Manager Evaluation – Ratings and Comments

The **Manager Rating** is required

Supervisors can enter comments in the **Manager Comments** box

Each rating has an associated value

Coordinate meeting schedules

Description : Coordinate department meeting schedule with little to no supervision

Manager Rating 3 - Met Expectations 3.00

Manager Comments

Writing Tools

Font Size B I U A A

Kelly coordinated the meeting schedule, though she required input and supervision about 40% of the time.

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Complete Manager Evaluation – Tab Summary

At the bottom of each tab is a **Summary** section

The supervisor selects the **Calculator** icon to calculate the overall rating for the tab

Override allows the supervisor to manually select a summary rating

Job Functions Summary

Manager Rating   [5 - Exceptional   ⬍]   4.00 🗐 🔢 Override

Complete Manager Evaluation

Supervisors can save their progress…

…or **Submit for Approval**

SCCMP Probationary Documents
Manager Evaluation - Update and
Kelly Sue DeConnick

Save | Submit for Approval

Print | Notify | Export

Actions ▼

Job Title	CLIN OPS SHS SUPV 2
Document Type	SCCMP Probationary Documents
Template	Probation Review - MGR Approve
Status	Evaluation in Progress

Manager	Nicolas Feria
Period	07/01/2022 - 06/30/2023
Document ID	16539
Due Date	04/01/2023

▼ **Employee Data**

Empl ID	10343344	
Department	SC2939	Student Health Services
Location	CSHS-1	Cowell Student Health, 1
Plan/Grade	CTSC 21	
Step	0	

Rating History

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings | ⓧ Cancel Evaluation

| Functions | Common Standards | Overall Summary |

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Document Approval

Depending on the template, the document will be approved in one of two ways:

- **ADM Approve**
  - Evaluation is approved by a divisional ePerformance administrator
  - Evaluation is found in the Worklist
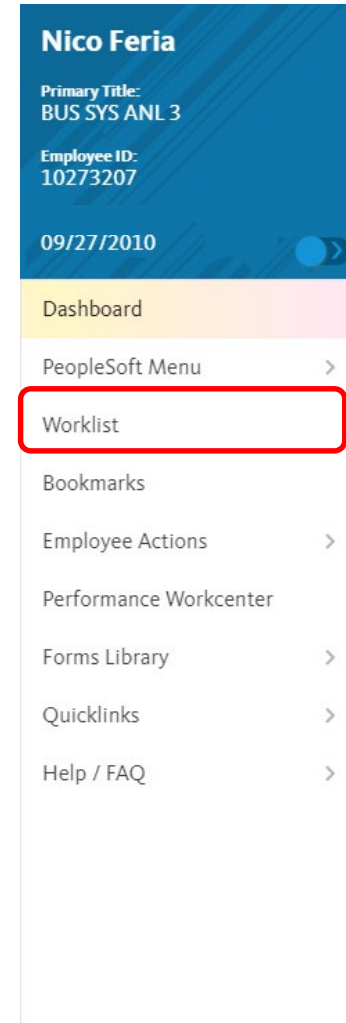
Nico Feria

Primary Title:
BUS SYS ANL 3

Employee ID:
10273207

09/27/2010

Dashboard

PeopleSoft Menu   >

Worklist

Bookmarks

Employee Actions   >

Performance Workcenter

Forms Library   >

Quicklinks   >

Help / FAQ   >

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Document Approval

Depending on the template, the document will be approved in one of two ways:

- **MGR Approve**
  - Evaluation is approved by the supervisor's supervisor

  - Evaluation is found through Manager Self Service > **Approve Perform/Develop Docs**

  - When searching for evaluations to approve, they must specify the Document Type as **SCCMP Annual Performance Docs**
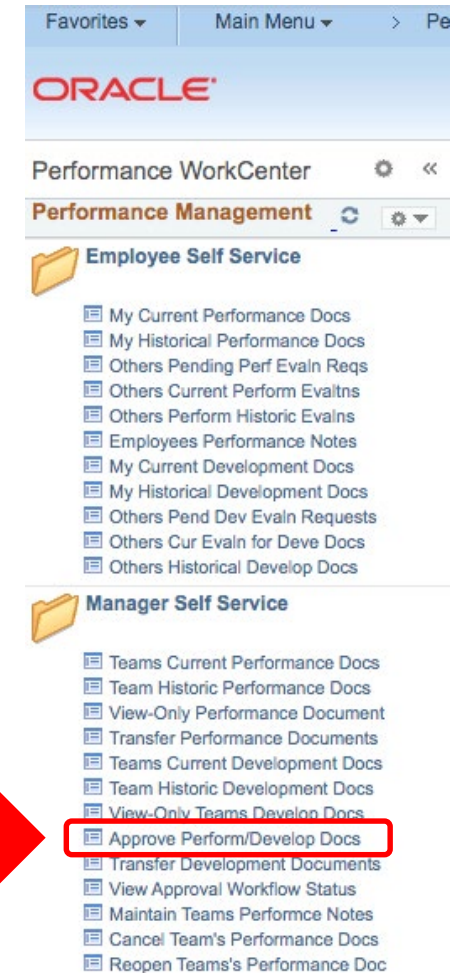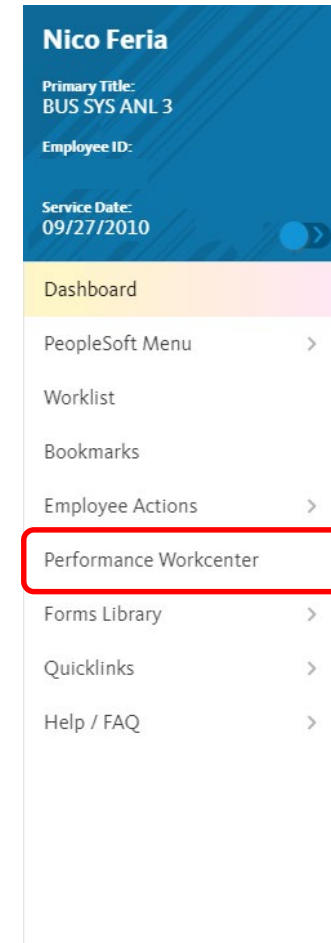
Share with Employee

Once the evaluation is approved, the supervisor can share it with the employee

Share with Employee

Performance Process

Steps and Tasks

Kelly Sue DeConnick

SCCMP Probationary Documents

03/01/2020 " 08/30/2020   Overview

✓ Define Criteria
Due Date 08/30/2020

◑ Complete Manager Evaluation
Due Date 06/01/2020

✓ Update and Submit

✓ Pending Approval

◑ Share with Employee

Pending Acknowledgement

SCCMP Probationary Documents

Manager Evaluation - Share with Employee

Kelly Sue DeConnick

Actions ▾

Print | Notify | Export

Job Title	CLIN OPS SHS SUPV 2
Document Type	SCCMP Probationary Documents
Template	Probation Review - MGR Approve
Status	Approval - Approved

Manager	Nicolas Feria
Period	03/01/2020 " 08/30/2020
Document ID	16526
Due Date	06/01/2020

▼ **Employee Data**

Empl ID	10343344	
Department	SC2939	Student Health Services
Location	CSHS-1	Cowell Student Health, 1
Plan/Grade	CTSC	21
Step	0	

Rating History

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Probationary Evaluation – Employee Navigation

Employee Acknowledges Evaluation

The employee clicks the **Acknowledge** button when they've finished reviewing the evaluation

The Employee can see their supervisor's ratings and comments for each item

Performance Process

Steps and Tasks

Karen Schloss
SCCMP Probationary Documents
07/01/2021 - 06/30/2022   Overview

Define Criteria
Due Date   06/30/2022

Review Manager Evaluation
Due Date   04/01/2022

Acknowledge

View

SCCMP Probationary Documents   Return to Current Documents   Acknowledge
Manager Evaluation - Acknowledge
Karen Schloss   Print | Notify | Export

Job Title	HR GENERALIST 5	Manager	Nicolas Feria
Document Type	SCCMP Probationary Documents	Period	07/01/2021 - 06/30/2022
Template	Probation Review - MGR Approve	Document ID	16538
Status	Pending Acknowledgement	Due Date	04/01/2022

Employee Data

Empl ID   10200383
Department   SC4037   HR Business Systems
Location   SVC-E1   Scotts Valley, Module E, 1
Plan/Grade   CTSC   25
Step   0

This document is currently waiting for your acknowledgment.

Select the Acknowledge button to confirm that you and your manager have discussed this document. Your name will be placed in the signature section on the printed document acknowledging that the review was held.

Functions	Common Standards	Overall Summary

Section 1 - Job Functions
Expand | Collapse

Learn departmental workflow

Description : Learn the department's workflow, filing system and databases.

Manager Rating   4 - Consistently Exceeds   4.00

Manager Comments   They learned all of our systems and found efficiencies to be had!

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Acknowledgement Override

SCCMP Probationary Documents
Return to Current Documents | Save | Override Acknowledgement

Manager Evaluation - Share with Employee

Print | Notify | Export

Kelly Sue DeConnick
Actions ▾

Job Title	CLIN OPS SHS SUPV 2	Manager	Rhonda Rhodes
Document Type	SCCMP Probationary Documents	Period	07/01/2021 - 06/30/2022
Template	Probation Review - MGR Approve	Document ID	16530
Status	Approval - Approved	Due Date	07/30/2022

▼ **Employee Data**

Empl ID 10343344
Department SC2939   Student Health Services
Location CSHS-1   Cowell Student Health, 1
Plan/Grade CTSC   21
Step 0

Rating History

This document is currently awaiting the employee's acknowledgement.

If the employee can not or does not acknowledge this document you ca...
overriding the employee's acknowledgment.

Reopen

Functions | Common Standards | Overall Summary

▼ Section 1 - Job Functions
Expand | Collapse

If the employee is unwilling or unable to acknowledge the evaluation, the supervisor can override the acknowledgement

The supervisor selects the reason they are overriding the acknowledgement

Acknowledge

You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so.

◉ Employee Not Available

○ Employee Refused

Select confirm to move the document to the next status.
Upon selecting confirm your electronic signature will be placed in the employee's signature section on this document with the reason why you are overriding the employee acknowledgement.

Confirm | Cancel

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Module 2 Quiz

- You now have the opportunity to assess your knowledge of the information presented in this module

- The questions and answers presented in this review help you to determine whether you remember and understand the important points

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Multiple Choice

If a supervisor wants to copy one or more criteria from another employee's evaluation to the current evaluation, which option would they choose after clicking "Add Item"?

A. Add your own item

B. Copy Item from my Documents

C. Copy Item from My Team's Documents

D. None of the above

Copy item from My Team's Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee's performance evaluation

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Multiple Choice

Who can view performance notes entered by a supervisor?

A. The supervisor who wrote them

B. The employee who the note is about

C. The supervisor of the supervisor who wrote them

D. All of the above

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True or False

A supervisor has no option to override employee acknowledgment if an employee is unavailable to acknowledge the evaluation.

True	False

FALSE. The supervisor can use the **Override Acknowledgment** function.

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ANNUAL EVALUATIONS

MODULE 3

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Module Objectives

1: ePerformance Overview

2: Probationary Evaluations

3: Annual Evaluations

At the end of this module you should be able to do the following:

- Describe how employees and supervisors can nominate participants

- Describe how employees complete their self evaluation

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ePerformance Process Flows: Annual Evaluations

Divisional ePerformance Administrator Creates Annual Performance Documents → Supervisor Defines Criteria → Participants are Nominated → Employee Completes Self Evaluation → Supervisor Reviews Self Evaluations and Participant Evaluations → Supervisor Completes Evaluation → Supervisor Shares Evaluation with Employee → Employee Acknowledges Evaluation → Supervisor Submits Evaluation for Approval → Approver Approves Evaluation

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Annual Evaluation – Supervisor Navigation

Annual Evaluation – Employee Navigation

Participants - Nominating

Performance Process

Steps and Tasks

Kelly Sue DeConnick
SCCMP Annual Performance Docs
07/01/2020 - 06/30/2021   Overview

- Define Criteria
  Due Date   09/03/2020

- Nominate Participants
  Due Date   06/15/2021
  Add Nominees
  Track Nominations

- Review Participant Evaluations
  Due Date   07/15/2021

- Review Self Evaluation
  Due Date   07/07/2021

- Complete Manager Evaluation
  Due Date   07/30/2021

- Both supervisors and employees can nominate peers to participate in the employee's annual performance evaluation

- When an employee nominates a participant, the supervisor has the option to accept or reject the nomination

- The employee cannot see which nominees participated, nor can they see any participant's evaluation of them

- A maximum of five participants are possible

- The Police templates do not allow the nomination of participants

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Participants - Nominating

SCCMP Annual Performance Docs
Nominate Participants - Add Nominees

Kelly Sue DeConnick
Actions ▼

Job Title CLIN OPS SHS SUPV 2	**Manager** Nicolas Feria
Document Type SCCMP Annual Performance Docs	**Period** 07/01/2020 - 06/30/2021
Template Non Rep Annual - MGR Approve	**Document ID** 16527
Status In Progress	**Due Date** 06/15/2021

◆ **Participant Role: Peer**   Minimum Required: 0   Maximum Available:5

Nominations
Currently there are no nominees in your nomination list.

➕ Add Peer

To nominate a participant, click the **Add Peer** link

Person Search

Nominate Participants
▶ **Instructions**

Search Criteria

Enter search criteria for your nominee and click **Search**

Last Name FRACTION
Business Unit
First Name

Search

Search Results

Select the desired nominee

☑ Matthew Fraction   ℹ

More Information

Click **OK**

OK

Return to Previous Page

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Participants - Nominating

Supervisors can save their progress…

Save | Submit Nominations

…or **Submit Nominations**

SCCMP Annual Performance Docs
Nominate Participants - Add Nomin...

Notify

Kelly Sue DeConnick
Actions ▼

Job Title CLIN OPS SHS SUPV 2	**Manager** Nicolas Feria
Document Type SCCMP Annual Performance Docs	**Period** 07/01/2020 - 06/30/2021
Template Non Rep Annual - MGR Approve	**Document ID** 16527
Status In Progress	**Due Date** 06/15/2021

The names of nominees for both the supervisor and employee are listed here.

✓ You have selected nominations for addition. The nominations will be added when the transaction is saved.

◆ **Participant Role: Peer**   Minimum Required: 0 Maximum Available:5

Nominations

Nominee	Action
Matthew Fraction	🗑

➕ Add Peer

The supervisor can remove nominees with the **trash** icon

Upon submission, nominees receive an email inviting them to participate in the employee's performance evaluation

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Participants – Tracking Nominations

Supervisors can track the status of each nomination

The available number of participants decreases

Nominations can be cancelled

Participants – Navigation

- Nominated participants receive an email inviting them to participate in the evaluation with a link to the evaluation

- Nominated participants can also navigate to their pending evaluation requests through the Performance Workcenter
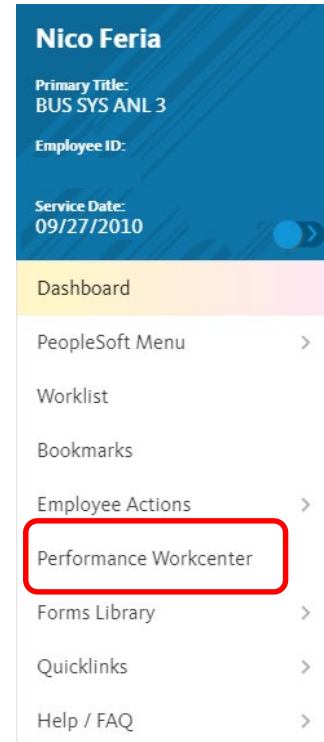
Participants – Accept or Decline

Pending Evaluation Requests

Pending Evaluation Requests

	Name	Document Type	Due Date
☑	Kelly Sue DeConnick	SCCMP Annual Performance Docs	07/15/2020

Select All   Deselect All

Accept   Decline

Nominees can select an evaluation

and **Accept**

Or Decline

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Participants – Navigation

- Participants can complete the evaluation by going to **Others Current Perform Evaltns**

Participants can select an evaluation by employee name

Participants - Evaluation

Participants can save their progress…

…or complete the evaluation

Participants only see an employee's Functions tab

Participants are only able to give summary comments

SCCMP Annual Performa...
Evaluation
Kelly Sue DeConnick

Document Type	SCCMP Annual Performance Docs	Manager Nicolas Feria
Template	Non Rep Annual - MGR Approve	Period 07/01/2019 - 06/30/2020
Status	Evaluation in Progress	Document ID 16537
Reviewer	Karen Schloss	Due Date 07/15/2020
		Role Peer

Save | Complete

Print | Notify

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

▼ Section 1 - Job Functions

Expand | ▶ Collapse

▼ **Printer and copier management**

Description : Ensure the smooth management of the printers and copiers, acting as the point of contact for client troubleshooting with little to no supervision.

Created By Nicolas Feria   02/07/2020 2:24PM

▼ **Become a Color Street Nail Vendor**

Description : Network with appropriate contacts to obtain necessary licensure and materials to represent SHR as an adequately skilled street vendor.

Created By Nicolas Feria   02/07/2020 2:26PM
Last Modified By Nicolas Feria   02/07/2020 2:26PM

Job Functions Summary

Comments

Font   Size   **B** *I* U

I was that 'appropriate contact' and Kelly Sue did in fact obtain the necessary licensure and materials. She was a pleasure to work with!

▼ **Audit History**

Created By Nicolas Feria   02/07/2020 2:20:28PM
Last Modified By Karen Schloss   02/07/2020 2:47:19PM

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Employee Self Evaluation - Navigation

Nico Feria

Primary Title:
BUS SYS ANL 3

Employee ID:

Service Date:
09/27/2010

- Dashboard
- PeopleSoft Menu
- Worklist
- Bookmarks
- Employee Actions
- Performance Workcenter
- Forms Library
- Quicklinks
- Help / FAQ

Favorites ▾   Main Menu ▾   >   Performance Workcenter   >   Performance Workcenter

ORACLE   All ▾   Search   »   Advanced Search

Performance WorkCenter ⚙ «

Performance Management ⟳ ⚙▾

📁 **Employee Self Service**
- ▦ My Current Performance Docs
- ▦ My Historical Performance Docs
- ▦ Others Pending Perf Evaln Reqs
- ▦ Others Current Perform Evaltns
- ▦ Others Perform Historic Evalns
- ▦ Employees Performance Notes
- ▦ My Current Development Docs
- ▦ My Historical Development Docs
- ▦ Others Pend Dev Evaln Requests
- ▦ Others Cur Evaln for Deve Docs
- ▦ Others Historical Develop Docs

📁 **Manager Self Service**

PeopleSoft ePerformance is a self-service evaluation management application for managers and employees. You can use ePerformance as a tool for planning, collaboration, communication, assessment, and monitoring evaluations for multiple purposes like performance, Probationary, Incentives and development document evaluations.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development document, through assessing and rewarding employee performance results within the right behaviors. ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes and With this application, you can:

- Define evaluation criteria.

- Introduce mid-period checkpoints to track employee progress.

- Manage multiple participants.

- Enter evaluation data, including notes, ratings, weights, and comments.

- Consolidate feedback from multiple sources into the manager/mentor's evaluation.

- Submit the manager/mentor evaluation for review and approval.

- Perform administrative tasks, such as transferring deleting documents.

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Employee Self Evaluation

Employee can select an evaluation by document type

Employee Self Evaluation

Participants can save their progress…

…or **complete the evaluation**

SCCMP Annual Performance Docs

Self-Evaluation - Update and Complete

Job Title	BUS SYS ANL 3
Document Type	SCCMP Annual Performance Docs
Template	Non Rep Annual - MGR Approve
Status	Evaluation in Progress

Manager	Rhonda Rhodes
Period	07/01/2021 - 06/30/2022
Document ID	16530
Due Date	07/07/2022

Print | Notify | Export

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

Functions | Goals | Common Standards | Overall Summary

Section 1 - Job Functions

Expand | Collapse

Develop training

Description : develop training for 12 employees

Employee Comments

I did this!

Created By Rhonda Rhodes   02/06/2020 4:09PM

Employee can leave comments for each Function or Goal

UCSC SHR

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Reviewing Participant Evaluations and Self Evaluation

Performance Process

Steps and Tasks

Kelly Sue DeConnick
SCCMP Annual Performance Docs
07/01/2019 * 06/30/2020   Overview

✓ Define Criteria
  Due Date   09/04/2019

◑ Nominate Participants
  Due Date   06/15/2020

◑ Review Participant Evaluations
  Due Date   07/15/2020

  View Participant Evaluation

○ Review Self Evaluation
  Due Date   07/07/2020

  View Self Evaluation

○ Complete Manager Evaluation
  Due Date   07/31/2020

Supervisors can access participant evaluations from the Performance Process bar

Supervisors can access the employee's self evaluation from the Performance Process bar

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Reviewing Participant Evaluations and Self Evaluation
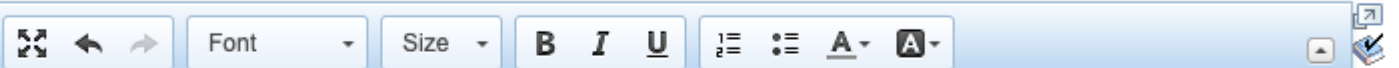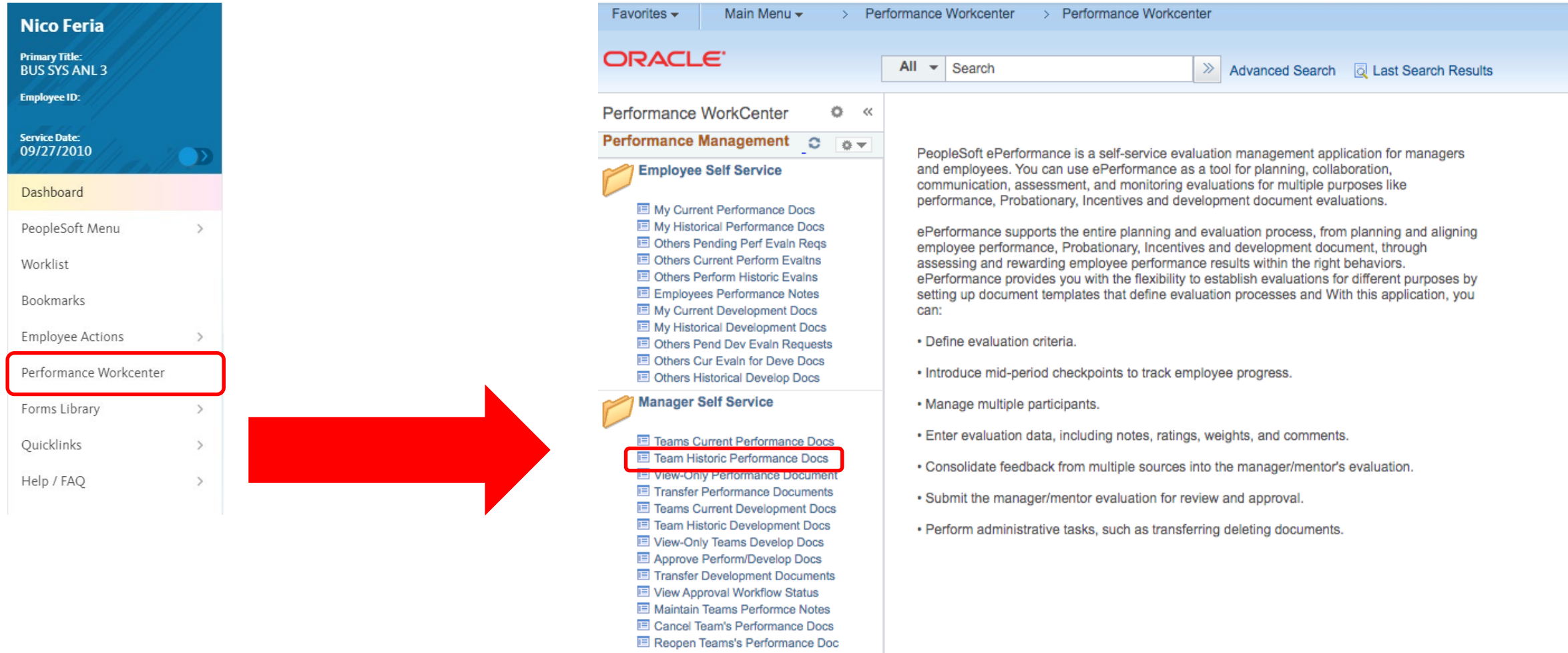
Supervisors can also see employee comments from their self evaluation under each function or goal when they are completing their evaluation of the employee

Annual Evaluation – Historic Performance Documents

Supervisors can access performance evaluations previously completed in ePerformance

Annual Evaluation – Historic Performance Documents

- Performance evaluations from the old appraisal system are not being converted in to ePerformance

- For performance evaluations completed in appraisals.ucsc.edu, supervisors should search their email for the emailed PDF, sent by the old appraisal system

- If a supervisor needs a copy of a performance evaluation for which they were not the supervisor, and that predates ePerformance (e.g., due to a Reports To change), they can reach out to their ER Analyst

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Module 3 Quiz

- You now have the opportunity to assess your knowledge of the information presented in this module

- The questions and answers presented in this review help you to determine whether you remember and understand the important points

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True or False

Only supervisors are able to nominate colleagues to participate in an employee's annual evaluation.

True	False

FALSE. Both supervisors and employees can nominate participants.

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Fill-In-The-Blank

Evaluations are set up to be approved by either **managers** or **divisional ePerformance administrators**.

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COURSE REVIEW

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Putting It All Together

- The ePerformance module in UCPath will be used to create and complete annual and probationary performance evaluations

- Probationary period evaluations are completed for **career and partial-year career** employees during their probationary period

- Annual performance evaluations are required for active **career** and **partial-year career** employees
  - Some contract employees also require annual performance evaluations

- Probationary performance evaluations will be created by an ePerformance administrator in ELR

- Annual performance evaluations will be created by divisional ePerformance administrators

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Putting It All Together (cont.)

- Performance evaluations can be set up to be approved by
  - The supervisor's supervisor, through Manager Self Service, or
  - A divisional ePerformance administrator, through the worklist

- Annual performance evaluations allow both the supervisor and the employee to nominate participants

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Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?

Where to Get Help

- The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks

  – From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers

  – From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component

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