

ePerformance for Employees



Process Overview

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

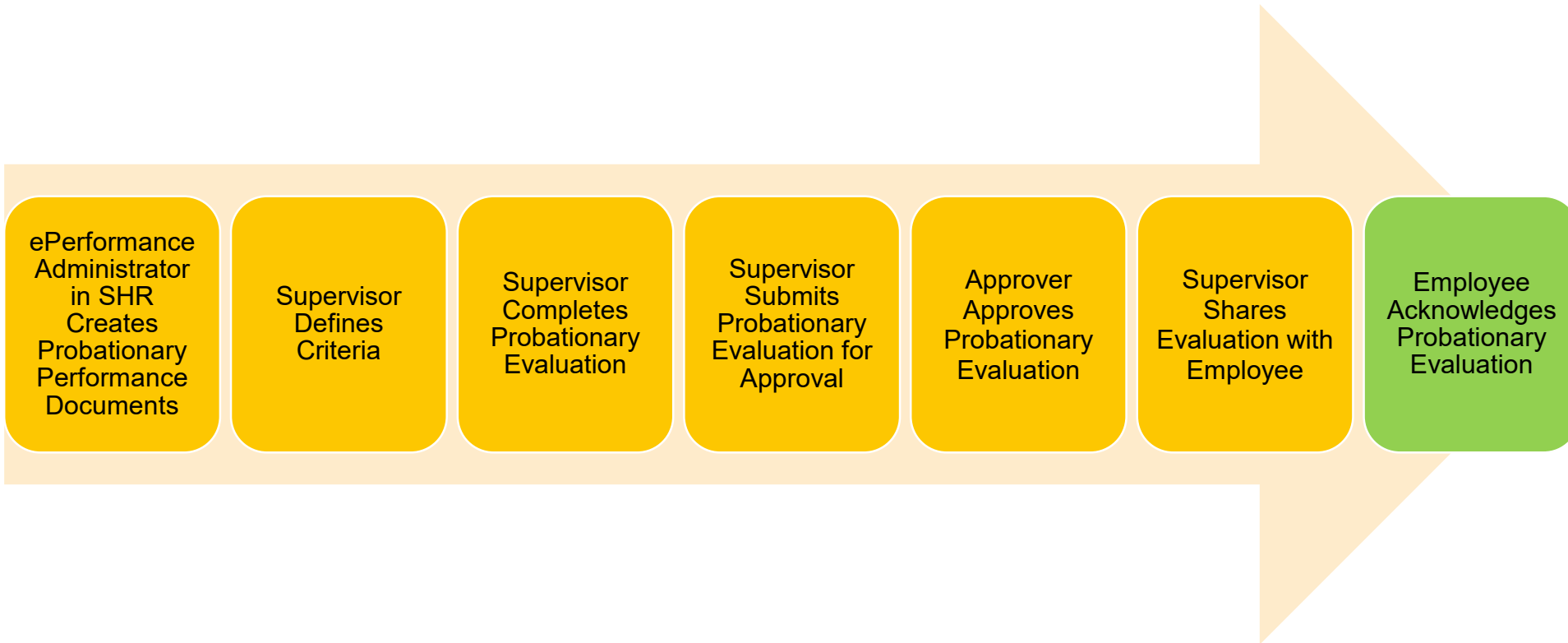
Document Types

- **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

Probationary Evaluations

- 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

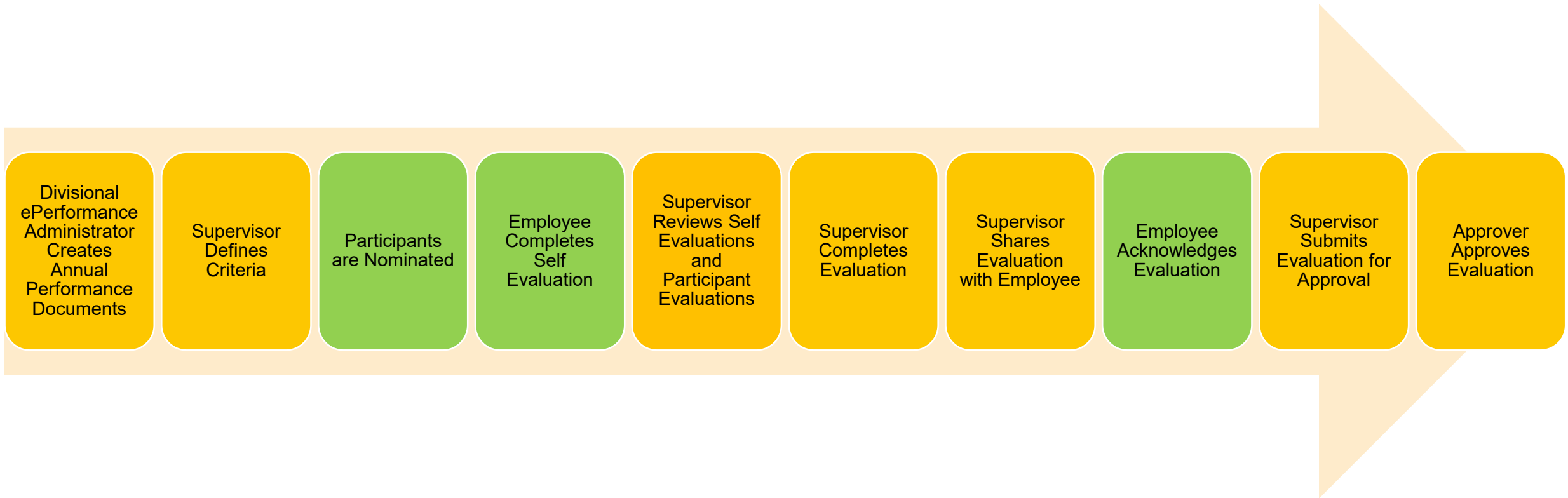
ePerformance Process Flows: Probationary Evaluations



Annual Performance Evaluations

- 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

ePerformance Process Flows: Annual Evaluations



Differences between Annual and Probationary Evaluations

Probationary	Annual
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 approved.
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.

Navigation

Employee 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.

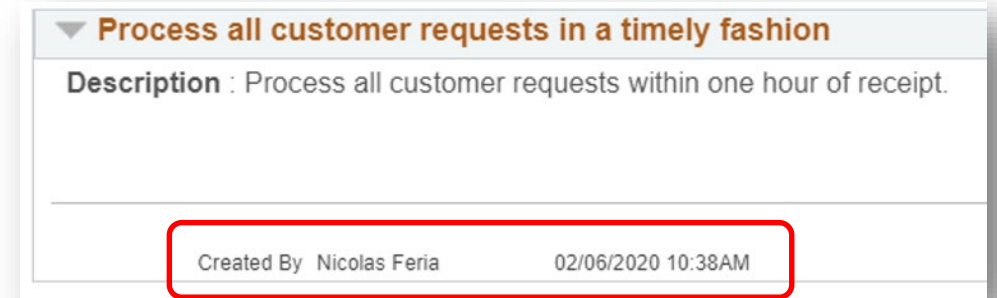
ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development document, through assessing and rewarding employee performance results within the right behaviors. ePerformance provides you with the flexibility 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.

Define Criteria

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



Nominating Participants

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

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



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



Select the desired nominee



Click **OK**



Person Search

Nominate Participants

► **Instructions**

Search Criteria

Last Name
Business Unit
First Name

Search

Search Results

Matthew Fraction i

OK

[Return to Previous Page](#)

Participants - Nominating

SCCMP Annual Performance Docs

[Return to Current Documents](#)

Save

When you are done, click **Save**

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

✔ 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



The names of are listed here

You can remove nominees with the trash icon

+ Add Peer

Completing Your Self Evaluation

Employee Self Evaluation

Performance Process

Steps and Tasks

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

Define Criteria
Due Date 05/31/2020
Update

Nominate Participants
Due Date 06/15/2020
Add Nominees

Complete Self Evaluation
Due Date 07/07/2020
Update and Complete

Review Manager Evaluation
Due Date 07/31/2020

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

Participants can save their progress...

...or complete the evaluation

Employee can leave comments for each Function or Goal

Reviewing and Acknowledging Your Evaluation

Employee Acknowledges Evaluation

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

Performance Process

Steps and Tasks

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

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

Print | Notify | Export

Karen Schloss

Job Title HR GENERALIST 5
Document Type SCCMP Probationary Documents
Template Probation Review - MGR Approve
Status Pending Acknowledgement

Manager Nicolas Feria
Period 07/01/2021 - 06/30/2022
Document ID 16538
Due Date 04/01/2022

Employee Data

Empl ID 10200383
Department SC4037
Location SVC-E1
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!

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