At the end of this training, as an ePerformance Administrator, you should be able to do the following:

• Distinguish between the Divisional vs. the ELR Administrator roles
• View and Understand:
  – Evaluation Approval Workflow and Status
    ▪ Where do I come in as an Administrator?
  – All employee’s historical evaluations
• Distinguish between evaluation templates and types
• Perform Divisional Administrative functions:
  – Create, Transfer, Reopen, Cancel, and Approve
Roles/Document Types/Approver Templates
# Roles: Division vs. ELR

<table>
<thead>
<tr>
<th>Divisional ePerformance Administrator</th>
<th>ELR ePerformance Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Divisional ePerformance Administrators</strong> can cancel and create new annual templates, if necessary (eg. if a unit or manager needs to have a different approver type than the rest of the division).</td>
<td><strong>ELR ePerformance Administrator</strong> creates group annual evaluations in the fall of each year according to template type requested by Division.</td>
</tr>
<tr>
<td><strong>Divisional ePerformance Administrators</strong> can cancel and create new probationary templates, if necessary (eg. if a unit or manager needs to have a different approver type than the rest of the division).</td>
<td><strong>ELR ePerformance Administrator</strong> creates probationary performance documents 1-2 months after hire.</td>
</tr>
<tr>
<td><strong>Divisional ePerformance Administrators</strong> may only transfer, reopen, and approve evaluations</td>
<td><strong>ONLY the ELR ePerformance Administrator</strong> can delete evaluations, after consultation.</td>
</tr>
</tbody>
</table>
Annual Performance Evaluations - Workflow
“SCCMP Annual Performance Docs”

1. ePerformance Administrator Creates Annual Performance Documents
2. Supervisor Defines Criteria
3. Participants are Nominated
4. Employee Completes Self Evaluation
5. Supervisor Reviews Self Evaluation and Participant Evaluations
6. Supervisor Completes Evaluation
7. Supervisor Shares Evaluation with Employee
8. Employee Acknowledges Evaluation
9. Supervisor Submits Evaluation for Approval
10. Approver Approves Evaluation
First, select SCCMP Annual Performance Docs

Then, select by employee and approval type

Administrator (ADM) Approve: Approved by divisional ePerformance Administrator
Manager (MGR) Approve: Approved by the supervisor’s supervisor
Probationary Evaluations - Workflow “SCCMP Probationary Documents”

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
Probationary Evaluation Selection

First, select SCCMP Probationary Documents

Then, select Template ID type by Manager or Admin Approve
View Documents and Navigation
Administrative Functions - Navigation

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks
View Performance Documents

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > View Documents
**Manager Self Service**
- Teams Current Performance Docs
- Team Historic Performance Docs
- View-Only Performance Document
- Transfer Performance Documents
- Teams Current Development Docs
- Team Historic Development Docs
- View-Only Teams Develop Docs
- Approve Perform/Develop Docs
- Transfer Development Documents
- View Approval Workflow Status
- Maintain Teams Performance Notes

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**View All EE Performance Docs**

### View Only Documents

**Employee Selection Criteria**
Select the employee you would like to view documents for.

**As Of Date**: 09/10/2021

![Select Employee](image)

**Michele's employees**

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Empl ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sonya Zhang</td>
<td>10295050</td>
</tr>
</tbody>
</table>

---

**View Performance Documents**

Listed are all the performance documents for the employee you selected.

### Performance Documents

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Document Type</th>
<th>Document Status</th>
<th>Business Unit</th>
<th>Period Begin</th>
<th>Period End</th>
<th>Job Title</th>
<th>Next Action</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>10295050</td>
<td>Sonya Zhang</td>
<td>SCCMP Annual Performance Docs</td>
<td>Evaluation in Progress</td>
<td>SCCMP</td>
<td>03/02/2021</td>
<td>03/02/2021</td>
<td>EMPLOYEE REL REP 2</td>
<td>Update and Submit</td>
<td>James Chiuas</td>
</tr>
<tr>
<td>10295050</td>
<td>Sonya Zhang</td>
<td>SCCMP Annual Performance Docs</td>
<td>Deltra Criteria</td>
<td>SCCMP</td>
<td>03/01/2021</td>
<td>03/01/2021</td>
<td>EMPLOYEE REL REP 2</td>
<td>Update and Approve</td>
<td>James Chiuas</td>
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<td>10290550</td>
<td>Sonya Zhang</td>
<td>SCCMP Annual Performance Docs</td>
<td>Deltra Criteria</td>
<td>SCCMP</td>
<td>07/01/2020</td>
<td>06/09/2021</td>
<td>EMPLOYEE REL REP 2</td>
<td>Update and Approve</td>
<td>Janny Hingorani</td>
</tr>
<tr>
<td>10295050</td>
<td>Sonya Zhang</td>
<td>SCCMP Annual Performance Docs</td>
<td>Completed</td>
<td>SCCMP</td>
<td>07/01/2019</td>
<td>08/06/2020</td>
<td>EMPLOYEE REL REP 2</td>
<td>Completed</td>
<td>Chris Cao</td>
</tr>
</tbody>
</table>
Manager Self Service: View Approval Workflow Status

Supervisors, Managers, Administrators with Manager Self Service folder access can view the approval workflows and statuses for all employees assigned to them in the View Approval Workflow Status.

Document Statuses:
- Acknowledged
- Approval
- Canceled
- Completed
- Define Criteria
- Evaluation in Progress
- Pending Acknowledgement
- Shared with Employee

Approval Statuses:
- Submitted
- Approved
- Denied
Creating Evaluations
Creating Evaluation Documents - Navigation

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Create Documents
Create Documents - Run Control IDs

- Used to create performance documents
- Arbitrary names for the document creation event that don’t drive anything in the system
- Click Search and all of your existing Run Control IDs will be returned, or...
- You can search for a specific Run Control ID in the Find an Existing Value tab, or...
- Create a new one in the Add a New Value tab
Create Documents - Run Request Parameters

Enter the performance evaluation Begin and End Dates

Select a Template ID
- ADM Approve approved via the Worklist
- MGR Approve approved via Manager Self Service

Select a Document Type
- SCCMP Annual Performance Docs, or
- SCCMP Probationary Documents
Create Documents - Run Request Parameters

Select a Manager Selection Method
- This determines which manager the performance document is assigned to
- Use By Reports To Position to assign the document to the employee’s Reports To supervisor

Performance documents can be created for predefined groups or for individual employees
Add individual employees or group ids
Create Documents - Run Request Parameters

Search by Employee ID

Or: click the magnifying glass icon to search by name
Create Documents – Group Build

Create batch evaluations by using predefined Group IDs

Click on the magnifying glass to search for a Group ID
Create Documents – Group Build

Search for the Group ID by ID or Description

Select the appropriate Group ID
Create Documents – Group Build

- Group IDs can target specific groups of people by department, supervisor, job code, etc.
- Group IDs can be reused year after year

Leave the **As Of Date** as today’s date
Create Documents - Run Request Parameters

You can save your parameters for the Run Control ID for future use.

When all parameters are completed, click Run.
Create Documents – Process Scheduler Request

Click OK
Create Documents – Process Scheduler Request

You will be brought back to the Create Documents page, and see a Process Instance number displayed.

NOW WAIT!

The system will take a few seconds to create an evaluation for one employee. Longer for a group of employees.
Create Documents - View Document Creation Results

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > View Document Creation Results
Create Documents - View Document Creation Results

Run Control ID

The Run Request Parameters
- Employee ID
- Employee Name
- Template
- Manager EID
- Supervisor Name

Document Creation Success and Status
- Document created successfully
Error Message

• Invalid or missing input parameter

• Document already exists.

Fix

• You may have entered a value that does not apply to the employee/group. Re-enter desired search criteria and rerun.

• The system only allows for one evaluation for any set evaluation period. If one was made in error, cancel the existing evaluation and create a new one.
Transfer Document
Use the Search for Documents window to find the evaluation you are looking for.

**Document Type** is a required search item.

EPerformance administrators can transfer a performance document to another supervisor.

Search for evaluations by employee or manager information.
Select the document you would like to transfer and click **Continue**.
Transfer Document

Click Select a Manager

Search for the manager who you want to transfer the evaluation to

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.
Transfer Document

You will see a confirmation that the document has been transferred.

The new manager’s name will display here.

Click Save
Reopen Document
Reopen an Evaluation

ePerformance administrators can reopen completed performance documents.

This reopens the evaluation at the “Manager Evaluation” step.

Use the Search for Documents window to find the evaluation you are looking for.

Document Type is a required search item.

Search for evaluations by employee or manager information.
Reopen an Evaluation

Select the document you would like to reopen and click Continue
Reopen an Evaluation

Reopen Document:

<table>
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<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Document Type</th>
<th>Document Status</th>
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<th>Period End</th>
<th>Job Title</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10343344</td>
<td>Kelly Sue DeConnick</td>
<td>SCCMP Annual Performance Docs</td>
<td>Approval - Approved</td>
<td>SCCMP</td>
<td>03/01/2020</td>
<td>02/28/2021</td>
<td>CLIN OPS HS SUPV 2</td>
<td>Share with Employee</td>
</tr>
</tbody>
</table>

You will see a confirmation that the document has been reopened.

Click Save to continue.
Cancel Document
Use the Search for Documents window to find the evaluation you are looking for.

**Document Type** is a required search item.

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be canceled except for already "Canceled" performance documents.

**Search for Documents**

- **First Name**
- **Manager First Name**
- **Document Type**
- **Period Between**
- **Job Code**
- **Last Name**
- **Document Status**
- **Department Set ID**
- **Department**

**Search** | **Clear**

Search for evaluations by employee or manager information.
Select the document you would like to cancel and click Continue.
Cancel Document

Confirm Cancellation

You have chosen to cancel the performance documents listed. To confirm this cancellation, select the "Save" button.

You will see a confirmation that the document has been cancelled.

Click Save

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<td>03/01/2020</td>
<td>02/28/2021</td>
<td>CLIN OPS SNS SUPV 2</td>
<td>Update and Submit</td>
<td>Nicolas Feria</td>
</tr>
</tbody>
</table>

Save Confirmation

The Save was successful.

OK
Approve Documents
Approve Documents

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Approve Documents (ALSO in the UCPath Dashboard Worklist)

At minimum, you must enter the Document Type and Document Template ID.

Select desired evaluation(s), then approve or deny.
REMINDER: Complete the Evaluation

Please remind your department supervisors and managers to complete all acknowledgement and approval steps.

Probationary Evaluations - Evaluation is acknowledged by the Employee after the Manager/Administrative Approval step

Annual Evaluations - Evaluation is approved by the Manager or Administrator after the Employee acknowledges it
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.

**SHR Process Pages/ePerformance Resources**

**Refresher and Content Training**

- **UCSC ePerformance Training for Managers and Supervisors**
- **UCSC ePerformance Training for Employees**

**Step by Step Tool Instructions:**

- **ePerformance Tool Instructions - Annual Evaluation**
- **ePerformance Navigation Guide**

**Content Guidance:**

- **Defining Criteria and Manager Evaluation**