ePerformance: Full User Navigation Presentation

~UC Santa Cruz SHR~
“The purpose of staff human resources (SHR) is to build a strong and healthy University.”

(SHR Inspirational Slug, courtesy of Detmar Finke)
Participant Agreements

- Confidentiality
- Principles of Community
- Agree to Disagree Respectfully and Constructively
- Active Listening when others are speaking
- Active Participation to the extent you are comfortable
- Eliminate/mitigate electronic interruptions
Course Agenda

01. ePerformance Overview
02. Defining Criteria
03. Performance Notes
04. Nominating Participants
05. Employee Self Evaluation
06. Review Participant and Employee Evaluations
07. Completing the Manager Evaluation
08. View Historical Performance Evaluations
Module Objectives

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

- Describe the ePerformance module of UCPath
- Describe the two evaluation types used in ePerformance
- Explain the business process around annual performance evaluations
- Explain the business process around probationary performance evaluations
2 Document Types

• Annual Performance Evaluations
  ▪ SCCMP Annual Performance Docs

• Probationary Performance Evaluations
  ▪ SCCMP Probationary Documents
Annual Performance Evaluations

• Created by ELR ePerformance administrator at the beginning of the performance cycle*

• Assigned to the supervisor based on position hierarchy

• Supervisor and Employee receive email notification only when a performance evaluation has been created
  ▪ ePerformance does not send reminder notifications

• Define Criteria step may be started when the evaluation is created, and finalized and approved at the end of the performance cycle, just before nominating participants/employee evaluation steps

• Different approval processes for Annual versus Probationary
Annual Performance Evaluations - Workflow

1. **ELR ePerformance Administrator**
   - Creates Annual Performance Documents

2. **Supervisor and Employee**
   - 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
Probationary Evaluations

• Created by ELR ePerformance Administrator upon hire. Then ELR creates Annual evaluations after probation is completed
• Assigned to supervisor based on position hierarchy
• Supervisors receive an email from UCPath when Probationary Evaluation is created
  ▪ Email will contain probationary end date information
  ▪ ePerformance does not send reminder notifications
• Criteria only include Job Functions and Common Standards
• Does not allow employee self evaluation or participant feedback
Probationary Evaluations - Workflow

- ELR 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
# Annual vs. Probationary Evaluations

<table>
<thead>
<tr>
<th>Annual</th>
<th>Probationary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ELR ePerformance administrator</strong> creates annual performance documents according to the approval type determined by the division.</td>
<td><strong>ELR ePerformance administrator</strong> creates probationary performance documents. ELR will also create the annual evaluation after probation is complete.</td>
</tr>
<tr>
<td>Annual performance evaluation has Functions, Goals and Common Standards tabs.</td>
<td>Probationary performance evaluation only has a Functions and a Common Standards tab.</td>
</tr>
<tr>
<td>Supervisors &amp; employees can nominate people to participate in the employee's annual performance evaluation.</td>
<td>There is no option to nominate a participant for probationary performance evaluations.</td>
</tr>
<tr>
<td>Employee completes a self evaluation for annual performance evaluations.</td>
<td>Employee does not complete a self evaluation for probationary performance evaluations.</td>
</tr>
<tr>
<td>Annual performance evaluation is first acknowledged by the employee and then approved by the approver.</td>
<td>Probationary evaluation is first approved by the approver and then acknowledged by the employee.</td>
</tr>
<tr>
<td>Employee has the option to leave comments when acknowledging an annual performance evaluation.</td>
<td>Employee does not have an option to leave comments when acknowledging a probationary performance evaluation.</td>
</tr>
</tbody>
</table>
Annual Evaluation Document Type/Template ID

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
VIEW ALL EE PERFORMANCE DOCS

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 Development Docs
- Approve Perform/Develop Docs
- Transfer Development Documents
- View Approval Workflow Status
- Maintain Teams Performance Notes

View-Only Documents
Employee Selection Criteria
Select the employee you would like to view documents for.

As Of Date: 09/10/2021

Michele Smith's employees
- Sonya Zhang

View Performance Documents
Listed are all the performance documents for the employee you selected.

Performance Documents
- Employee ID: 5950
  - Name: Sonya Zhang
  - Document Type: SCCMP Annual Performance Docs
  - Document Status: Evaluation in Progress
  - Business Unit: SCCMP
  - Period Begin: 03/02/2021
  - Period End: 03/02/2021
  - Job Title: EMPLOYEE REL REPR 2
  - Next Action: Update and Submit
  - Manager: James Chihua

- Employee ID: 5950
  - Name: Sonya Zhang
  - Document Type: SCCMP Annual Performance Docs
  - Document Status: Definition Criteria
  - Business Unit: SCCMP
  - Period Begin: 03/01/2021
  - Period End: 03/01/2021
  - Job Title: EMPLOYEE REL REPR 2
  - Next Action: Update and Approve
  - Manager: James Chihua

- Employee ID: 900
  - Name: Sonya Zhang
  - Document Type: SCCMP Annual Performance Docs
  - Document Status: Definition Criteria
  - Business Unit: SCCMP
  - Period Begin: 07/01/2020
  - Period End: 07/01/2020
  - Job Title: EMPLOYEE REL REPR 2
  - Next Action: Update and Approve
  - Manager: Janene Hargrave

- Employee ID: 1029
  - Name: Sonya Zhang
  - Document Type: SCCMP Annual Performance Docs
  - Document Status: Completed
  - Business Unit: SCCMP
  - Period Begin: 07/01/2019
  - Period End: 07/01/2019
  - Job Title: EMPLOYEE REL REPR 2
  - Next Action: Completed
  - Manager: Chris Cao
View Approval Workflow Status
Module Objectives

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

- Navigate to the Performance Workcenter
- Locate performance evaluations
- Define functions and goals for a performance cycle
Supervisor Navigation
Supervisor Navigation

Supervisors enters desired Filter Criteria

Be sure to select a Document Type that starts with SCCMP
Select the evaluation you wish to work on
Employee Navigation

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's evaluation.
- Submit the manager's evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.
## Employee Navigation

**Current Performance Documents**

Lorenzo Lama

Listed are your current performance documents.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Document Status</th>
<th>Business Unit</th>
<th>Period Begin</th>
<th>Period End</th>
<th>Job Title</th>
<th>Next Due Date</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>10200</td>
<td>SCCMP Probationary</td>
<td></td>
<td>03/01/2020</td>
<td>08/30/2020</td>
<td>HR GENERALIST 5</td>
<td>08/30/2020</td>
<td>Sally S. Loth</td>
</tr>
<tr>
<td>10200</td>
<td>SCCMP Annual</td>
<td>Define Criteria</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10200</td>
<td>Performance Docs</td>
<td>Evaluation in Progress</td>
<td>06/30/2019</td>
<td>07/01/2020</td>
<td>HR GENERALIST 5</td>
<td>07/08/2020</td>
<td>Sally S. Loth</td>
</tr>
</tbody>
</table>

Employee can select an evaluation by document type
Evaluation General Overview

The Performance Process bar shows where in the process the evaluation is.

- **Define Criteria**
  - Due Date: 04/15/2021
  - View

- **Nominate Participants**
  - Due Date: 04/30/2021

- **Review Participant Evaluations**
  - Due Date: 05/30/2021

- **Review Self Evaluation**
  - Due Date: 05/29/2021

- **Complete Manager Evaluation**
  - Due Date: 06/15/2021
    - Update and Share
      - Submit for Approval
      - Pending Approval

**Criteria**

- **Employee Data**
  - Employee ID: 1027
  - Department: SC1085 - Employee & Labor Relations
  - Location: BVC-E1 - Scotts Valley, Module E, 1
  - Plan/Grade: CTSC 22
  - 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**
  - Functions
  - Goals
  - Common Standards
  - Overall Summary

**Section 1 - Job Functions**

- Expand
- Collapse
- Add Item

**Reception**

- Description: answer phones
Define Criteria

• Defining Criteria should begin when the evaluation is created, toward the start of the performance cycle, and may wait to be approved just prior to completing the manager evaluation

• **Functions** tab
  ▪ General summary of job duties

• **Goals** tab
  ▪ Goals for the *current* performance cycle

• **Common Standards** tab contain
  ▪ Prepopulated criteria about diversity and principles of community
  ▪ Cannot be modified
Save! Don’t get logged out!

• UCPath will log you out of all tabs after ~20 minutes of inactivity
  – From the dashboard, accessing the Performance Workcenter opens a new window. If you have multiple tabs open to UCPath, each tab is running its own timer
  – If any browser tab open to UCPath is left untouched for ~20 minutes, it will log you out of all tabs (even if you are actively working in another UCPath tab!)

• We recommend closing the first UCPath tab, containing your Dashboard, to avoid an unwanted logout

• Don’t forget to save your work frequently!
Define Criteria

To add criteria, click Add Item

Criteria display on three tabs:
- Functions
- Goals
- Common Standards
Define Criteria – Add Your Own Item

Add your own item
Allows you to write custom criteria

Add Item

- Add your own item
- Copy item from my Documents
- Copy Item from My Team’s Documents

Next

Add Your Own Item

Title: Customer Service

Description:

- Greet Customers at Reception Desk
- Answer Customer Questions
- Answer the phone

Add

Return
Copy item from my Documents
Supervisors can add an item from their own evaluation to an employee’s

Supervisor selects one or more criteria

Add Item
- Add your own Item
- Copy item from my Documents
- Copy item from My Team’s Documents

Next

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: Sally S. Loth
Section: Job Functions
Begin Date: 07/01/2019
End Date: 08/31/2020
Document Type: SCCANNUL

Manager Job Functions
- User Training
- Sloth Training

Select All
Deselect All
Copy
Cancel
Define Criteria – Copy Item from My Team’s Documents

Copy item from My Team’s Documents

Supervisors can copy items from another report’s evaluation to the current evaluation.

Enter desired criteria to filter

Select an evaluation

Add Item

- Add your own item
- Copy item from my Documents
- Copy Item from My Team’s Documents

Performance Document
Select a Document

Below is a list of documents you own. Select the document you want to copy items from.
Define Criteria – Copy Item from My Team’s Documents

Select desired criteria to Copy

Click on title to View item description:
Define Criteria

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

Create Employee Action Database

Description:

- Identify data fields
- Survey Employee Relations team to identify desired reports
- Build database and user interfaces
- Lead testing and implementation phases

Criteria may be copied, edited or deleted

Created By Kermut Jun 10/29/2020 1:38PM
Copy to Other Documents
Supervisor can copy the current item to another performance evaluation

When selected, the supervisor will see a pop up message letting them know the item will be saved.
Supervisors can select one or more performance evaluations that the item can be added to and then click Continue.
Define Criteria – Copy to Other Documents

Copy to Other Documents
Supervisor can copy the selected item from the current evaluation to others

Supervisors confirm the action by clicking Save
Define Criteria – Edit

Supervisors can edit the title and the description.
- Supervisors confirm their edits with the **Update** button.
Define Criteria – Delete

Supervisors can delete an existing item

Supervisors are prompted to confirm the deletion

SCCMP Probationary Documents
Delete Confirmation

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

Yes - Delete  No - Do Not Delete
Define Criteria

• During the Define Criteria step, employees and supervisors are both able to add items to the evaluation, and to edit existing items, as determined by the supervisor.

• The author’s name will display at the bottom of newly added item following the words “Created By”.

• The author’s name will display at the bottom of an item when criteria is modified, 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.
Approving Criteria

Click Approve to finalize criteria and move to next step

The icon next to that step or task will turn into a green checkmark when complete

Supervisors can reopen (only) the last completed step
Module Objectives

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

- Create and edit performance notes
Performance Notes

• Employees and supervisors can document the employee’s performance using Performance Notes

• Employees and supervisors can use Performance Notes throughout the performance cycle

• Performance Notes are only visible to the author of the note and will not be part of the final evaluation

• However, Performance Notes will be permanently retained in the system upon manager or admin approval of the completed evaluation
  
  - If you want to delete performance notes, you’ll need to delete them prior to submitting the evaluation for approval.
Performance Notes – Supervisor Navigation

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.
Supervisors can search for their performance notes by employee ID and date range, or they can add a new note.
Performance Notes – Employee Navigation

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- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.
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
BREAK TIME!
At the end of this module you should be able to do the following:

- Nominate Participants
- Approve Participant Nominations
- Track Participant Evaluation Status
- Respond to a Nomination
- Provide Participant Feedback
Participants - Nominating

- Both supervisors and employees can nominate peers to provide general feedback
- Supervisors can accept or reject employee nominations
- Employees cannot view/access participant information
- A maximum of five participants
- The Police templates do not allow the nomination of participants
To nominate a participant, click the Add Peer link.

Enter search criteria for your nominee and click Search.

Select the desired nominee.

Click OK.
Participants - Nominating

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

The supervisor can remove nominees with the trash icon.

Supervisors can save progress...

...or Submit Nominations

Upon submission, nominees receive an email inviting them to participate in the employee’s performance evaluation.
Participants – Tracking Nominations

Supervisors can track the status of each nomination.

Tracks # of remaining participants

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

Nominees can select an evaluation and **Accept** or **Decline**
Participants – Navigation

• Participants can complete the evaluation by going to **Others Current Perform Evalsns**

Participants can select an evaluation by employee name.
Participants - Evaluation

Participants only see an employee’s Functions tab

Participants are only able to give summary comments

Participants can save progress…

...or complete the evaluation
Module Objectives

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

- Complete an employee self evaluation
Employee Self Evaluation - Navigation

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 employees 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. 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.
## Employee Self Evaluation

### Current Performance Documents

Sally S. Loth

Listed are your current performance documents.

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<td>08/30/2020</td>
<td>HR GENERALIST 5</td>
<td>08/30/2020</td>
<td>Nicolas Feria</td>
</tr>
<tr>
<td>SCCMP Annual Performance Docs</td>
<td>Evaluation in Progress</td>
<td>SCCMP</td>
<td>06/30/2019</td>
<td>07/01/2020</td>
<td>HR GENERALIST 5</td>
<td>07/08/2020</td>
<td>Nicolas Feria</td>
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</tbody>
</table>

Employee can select an evaluation by document type.
Employee Self Evaluation

Participants can save progress... or complete the evaluation

Employee can leave comments for each Function or Goal
REVIEW PARTICIPANT AND EMPLOYEE EVALUATIONS

MODULE 7
Module Objectives

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

- Review Nominated Participant Feedback
- Review Employee’s Self Evaluations
Reviewing Participant Evaluations and Self Evaluation

Supervisors can access Participant Evaluations from the Performance Process bar.

Supervisors can access the employee's Self Evaluation from the Performance Process bar.
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.
Supervisors can review participant evaluations.

Select desired Participant’s name to open their evaluation.
View the Participant Evaluation-Supervisor

The participant evaluation opens in a new tab.

Supervisor reviews overall participant job function summary.

To return to the evaluation, close participant evaluation tab and click return on participant evaluations list page.
COMPLETING THE MANAGER EVALUATION

MODULE 8
Module Objectives

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

- Complete the Manager Evaluation
About Low-Scoring Evaluations

• Supervisor **must** inform ER Analyst if they intend to rate the employee 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.
Complete Manager Evaluation

Enter evaluation rating and Manager Comments for each Defined Criteria and Overall Summary

Define Criteria
- Due Date: 09/04/2019

Nominate Participants
- Due Date: 08/15/2020

Review Participant Evaluations
- Due Date: 07/15/2020

View Participant Evaluation

Review Self Evaluation
- Due Date: 07/07/2020

Complete Manager Evaluation
- Due Date: 07/30/2020

Update and Share
Complete Manager Evaluation – Ratings and Comments

The Manager Rating is required.

Each rating has an associated value.

Supervisors can enter comments in the Manager Comments box.

Manager Rating: 3 - Met Expectations

Manager Comments:
Kelly coordinated the meeting schedule, though she required input and supervision about 40% of the time.
Overall Manager Rating 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 different from the one automatically calculated by the system.
Complete Manager Evaluation

Supervisors can save their progress...

...or Share with Employee

Manager Rating

Manager Comments
Employee Acknowledges Evaluation

The employee can see their supervisor’s ratings and comments for each item.

The employee clicks the Acknowledge button when they’ve finished reviewing the evaluation.
Acknowledgement Override

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 acknowledgement, then confirms.
Submit for Approval

Once the evaluation has been acknowledged, the supervisor submits it for approval.
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

- **MGR Approve**
  - Evaluation is approved by the supervisor’s supervisor
  - Evaluation is found through Manager Self Service

* Divisional Administrator actions are temporarily being completed by ELR for the 2020-21 evaluation period
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.
Annual and Probationary Evaluation Approval Workflow

Reminder: The workflow differs between annual and probationary evaluations:

• Annual evaluations are first acknowledged by the employee and then approved by the approver.

• Probationary evaluations are first approved by the approver and then acknowledged by the employee.
Module Objectives

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

- View performance evaluations completed in ePerformance
Historic Performance Documents

Supervisors can access performance evaluations previously completed in ePerformance. 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.

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- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.
Additional ePerformance Tool Training:
  ● UCSC ePerformance Training for Managers and Supervisors (Full Tool Training)
  ● 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

SHR ePerformance Resources page:
https://shr.ucsc.edu/resources-forms/eperformance-performance-evaluations/index.html
Thank you all for coming to our training

Questions?