ePerformance
ePerformance Tool Navigation

~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
- 09. Administrative Functions
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 divisional ePerformance administrators at the beginning of the performance cycle*

• Assigned to the supervisor based on position hierarchy

• Supervisor and Employee receive email notification 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

* Divisional Administrator actions are temporarily completed by ELR for the 2020-21 evaluation period
Annual Performance Evaluations - Workflow

1. Divisional 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
Probationary Evaluations

- Created by ELR ePerformance Administrator upon hire
- 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

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><em>Divisional ePerformance administrator</em> creates annual performance documents for their division.</td>
<td>ePerformance administrator in Staff Human Resources creates probationary performance documents.</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>

* Divisional Administrator actions are temporarily being completed by ELR for the 2020-21 evaluation period
VIEW ALL EE PERFORMANCE DOCS
DEFINING CRITERIA

MODULE 3
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

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 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

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- 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 Navigation

Employee can select an evaluation by document type.
Evaluation General Overview

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

Criteria

Evaluation details
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
Define Criteria – Copy Item from My Documents

Copy item from my Documents

Supervisors can add an item from their own evaluation to an employee’s

Supervisor selects one or more criteria

Copy item from my Documents

Add Item

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

Next

Return

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: Janice Lizaso
Section: Job Functions
Begin Date: 07/01/2019
End Date: 09/30/2020

Document Type: SCCANNUL

Manager Job Functions

- User Training
- Sloth Training

Select All
Deselect All
Copy
Cancel
Copy item from My Team’s Documents

Supervisors can copy items from another reports' 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

Next

Select a Document

Filter Criteria
- First Name
- Last Name
- Document Type
- Document Status
- Period Between

Filter

Performance Documents
- Select
- Name
- Document Type
- Document Status
- Period Begin
- Period End

Select
- Cristy Sorerson
- SCGMP Annual Performance Docs
- Define Criteria
- 07/01/2019 to 06/30/2020

Select
- Molly Heath
- SCGMP Annual Performance Docs
- Define Criteria
- 07/01/2010 to 06/30/2020
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

Criteria may be copied, edited or deleted

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

Created By: Janice Lizaso  10/29/2020  1:39PM
Define Criteria – Copy to Other Documents

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

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.
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

You have chosen to add the item – Learn how to braid sloth hair to the performance documents listed. To confirm this assignment, select the Save button.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1-2 of 2</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Job Title</td>
<td>Period Begin</td>
<td>Period End</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cristy Sorensen</td>
<td>EMPLOYEE REL REPR 4</td>
<td>07/01/2019</td>
<td>05/30/2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Molly Heath</td>
<td>EMPLOYEE REL REPR 2</td>
<td>07/01/2019</td>
<td>05/30/2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save

Return
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.
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
Performance Notes – Employee Navigation

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- 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.
Performance Notes

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

MODULE 5
Module Objectives

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.

Supervisors can save progress...

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.

...or Submit Nominations
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 Evalns**

  ![Diagram showing navigation steps](image)

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

Participants only see an employee’s Functions

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

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- 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

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.
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.
Enter evaluation rating and Manager Comments for each Defined Criteria and Overall Summary.
Complete Manager Evaluation – Ratings and Comments

<table>
<thead>
<tr>
<th>Coordinate meeting schedules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description: Coordinate department meeting schedule with little to no supervision</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manager Rating</th>
<th>Manager Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 - Met Expectations</td>
<td>Kelly coordinated the meeting schedule, though she required input and supervision about 40% of the time.</td>
</tr>
</tbody>
</table>

The Manager Rating is required.

Each rating has an associated value.

Supervisors can enter comments in the Manager Comments box.
The overall manager rating section is displayed. The supervisor selects the "Calculator" icon to calculate the overall rating for the tab. "Override" allows the supervisor to manually select a summary rating.
Supervisors can save their progress or share with an Employee.
Exercise!

What process do you use when delivering the performance evaluation?
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

The supervisor selects the reason they are overriding the acknowledgement.
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
Document Approval: ADM and MGR Access

ADM Approve

MGR Approve

Performance Workcenter

Approve Perform/Develop Docs
Annual and Probationary Evaluation 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.
VIEW HISTORICAL PERFORMANCE EVALUATIONS

MODULE 9
Module Objectives

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

- View performance evaluations completed in ePerformance
Probationary Evaluation – Historic Performance Documents

Supervisors can access performance evaluations previously completed in ePerformance.
Additional Training Resources

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?
START

ADMIN ONLY TRAINING
ADMINISTRATIVE FUNCTIONS

MODULE 10
Module Objectives

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

• Create an evaluation
• Change the due date of an evaluation
• Change the document dates of an evaluation
• Transfer an evaluation to a new supervisor
• Reopen an evaluation
• Cancel an evaluation
• Delete an evaluation
CREATING EVALUATIONS

MODULE 2
VIEW ALL EE PERFORMANCE DOCS
Templates and Approvers

For most templates there are two approver types:

• **Administrator (ADM) Approve**
  – Evaluation is approved by a divisional ePerformance Administrator
  – Evaluation is found in the Worklist

• **Manager (MGR) Approve**
  – Evaluation is approved by the supervisor’s supervisor
  – Evaluation is found through Manager Self Service
Templates

Annual performance evaluations have six template options:

- **Non Rep Annual**
  - ADM Approve
  - MGR Approve
- **Police**
  - ADM Approve
  - MGR Approve
  - The templates for police do not allow for nominated participants
- **Represented Annual**
  - ADM Approve
  - MGR Approve
  - The templates for non-represented and represented employees differ in their due dates
Creating Evaluation Documents - Navigation

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Create Documents
ePerformance uses **Run Control IDs** to create performance documents.

Run Control IDs are arbitrary names for the document creation event that don’t drive anything in the system.

You can search for a specific Run Control ID in the **Find an Existing Value** tab.

If you don’t know the Run Control ID, you can just click Search and your existing Run Control IDs will be returned.
Create Documents – Add a New Value

• If you don’t have an applicable Run Control ID you can create a new one in the **Add a New Value** tab

• Run Control IDs can be reused

• Run Control IDs cannot contain
Create Documents - Run Request Parameters

Enter the performance evaluation Begin and End Dates

Select a Document Type
- SCCMP Annual Performance Docs, or
- SCCMP Probationary Documents

Only use documents starting with our business unit, SCCMP

Select a Template ID
- ADM Approve can be approved by a divisional ePerformance administrator via the Worklist
- MGR Approve can be approved by the supervisor’s supervisor via
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
Create Documents - Run Request Parameters

If you know the Employee’s Employee ID, you can type it in here.

If you don’t know the Employee ID, you can click the magnifying glass icon to search for the employee.
Create Documents - Run Request Parameters

- The default search operator in UCPath is **begins with**
- This tends to give more restricted results
- **Contains** generally yields more search result

**Note:** UCPath can only give 300 results in a search. If your search yields 300 results, you are likely missing more results.

Select the employee you are looking for.
Create Documents - Run Request Parameters

**Run Control ID**: annual_evaluation

**Period Begin Date**: 07/01/2020

**Document Type**: SCCMP Annual Performance Docs

**Manager Selection Method**: By Reports To Position

**Period End Date**: 06/30/2021

**Template ID**: Non Rep Annual - MGR Approve

**Create Documents Using**

- Group ID
- Employee ID

**Documents Using Employee ID**

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Emp ID</th>
<th>Name</th>
<th>Language Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>10342344</td>
<td></td>
<td>Kelly Sue DeConnick</td>
<td></td>
</tr>
</tbody>
</table>
Evaluations can also be batch created by using predefined Group IDs.
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**
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
Group IDs

• All annual appraisals will be created in batches via group ID
  ▪ You will not need to create individual evaluations in most cases

• Group IDs create evaluations for Career and Partial Year Career employees only. Evaluations for contract employees are not created automatically. Supervisors will need to reach out to their ER Analyst to request an annual evaluation for a contract employee.

• There will be two group IDs per division, one for represented employees and another for non-represented employees

• If there is more than one ePerformance admin assigned to a division/unit, only one will need to create evaluations per cycle
Create Documents - View Document Creation Results

Here you can see...

Run Control ID

The Run Request Parameters

- Employee ID
- Employee Name
- Template
- Manager EID
- Supervisor Name

Document Creation Success and Status

SCANNL

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Emp Name</th>
<th>Template ID</th>
<th>Manager ID / Mentor ID</th>
<th>Supervisor Name</th>
<th>Success</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10343344</td>
<td>Kelly Sue DeConnick</td>
<td>SCANNL Annual Performance Docs</td>
<td>102000626</td>
<td>Nicolas Feria</td>
<td>Yes</td>
<td>Document created successfully</td>
</tr>
</tbody>
</table>
Change Document Due Date

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

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.
Change Document Due Date

Click the **Change Due Date** link in the evaluation.
Change Document Due Date

Enter the new due date and click OK.
Administrative Functions - Navigation

**Navigation:** PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks
Change Document Date

ePerformance administrators can change the dates of a performance document.

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.
Change Document Date

Select a search result and click
Change Document Date

Enter the new evaluation period begin and end dates and click Save.

You will see a confirmation that the new dates for the document have been saved.
Use the Search for Documents window to find the evaluation you are looking for.

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

**Search for Documents**

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

- First Name
- Manager First Name
- Document Type: SCCMP Annual Performance Docs
- Period Between: 
- Job Code: 
- Last Name: deconnick
- Document Status
- Department: SCCMP

**Search for evaluations by employee or manager information**

**Transfer Document**

ePerformance administrators can transfer a performance document to another supervisor.
Select the document you would like to transfer and click Continue.
Click **Select a Manager**

Search for the manager who you want to transfer the evaluation to.
## Transfer Document

**Confirm Transfer**

### 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>10343344</td>
<td>Kelly Sue DeConick</td>
<td>SCCMP Annual Performance</td>
<td>Evaluation in Progress</td>
<td>SCCMP</td>
<td>03/01/2020</td>
<td>02/28/2021</td>
<td>CLIN OPS SHS SUPV 2</td>
<td>Update and Submit</td>
<td>Nicolas Pena</td>
</tr>
</tbody>
</table>

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.

**New Manager ID:** Brian Bendix

Click Save

The new manager's name will display

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

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

Click the Save button to confirm the change.
Cancel 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 cancel performance documents.

Search for evaluations by employee or manager information.
Cancel Document

Select the document you would like to cancel and click **Continue**.
Cancel Document

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

Click Save

You will see a confirmation that the document has been cancelled.
ePerformance administrators can delete performance documents

**Note:** Only cancelled documents can be deleted.

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.
Delete Document

Select the document you would like to delete and click.
Delete Document

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

Click Save

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

Save Confirmation

The Save was successful.
Putting It All Together (cont.)

- Probationary performance evaluations will be created by an ePerformance Administrator in ELR
- Annual performance evaluations will be created by divisional ePerformance Administrators*
- Run Control IDs are used to create performance documents and can be reused
- Performance evaluations can be set up to be approved by
  - The supervisor’s supervisor, as MGR Approve A divisional ePor ADM Approve by a Divisional Administrator
- Annual performance evaluations allow both the supervisor and the employee to nominate participants

* Divisional Administrator actions are temporarily completed by ELR for the 2020-21 evaluation period
Putting It All Together (cont.)

• ePerformance Administrators can
  – Change the due date of a performance document
  – Change the dates of a performance document
  – Transfer a performance document to a different supervisor
  – Reopen completed performance documents
  – Cancel a performance document
  – Delete a performance document
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](#)