

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)

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



EPERFORMANCE OVERVIEW

MODULE 1



Module Objectives

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

At the end of this module you should understand the following:

- the ePerformance module of UCPath
- the two evaluation types used in ePerformance
- the business process for annual performance evaluations
- the business process for probationary performance evaluations

Performance Workcenter – Navigation

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 Last Search Results

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

- 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
- Cancel Team's Performance Docs
- Reopen Teams's Performance Doc

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.

2 Document Types

- **Annual Performance Evaluations**
 - SCCMP Annual Performance Docs
- **Probationary Performance Evaluations**
 - SCCMP Probationary Documents

Current Performance Documents

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

Filter Criteria

First Name	<input type="text"/>	
Document Type	<input type="text"/>	D
Period Between	<input type="text"/>	De
Job Code	<input type="text"/>	

Filter Clear

Document Type dropdown menu:
SCCMP Annual Performance Docs
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

Annual Performance Evaluations - Workflow



Probationary Evaluations

- Created by ELR ePerformance Administrator upon hire. Then ELR creates annual evaluations after probation is completed
- Assigned to designated supervisor within UCPath
- Supervisors receive an email from UCPath when Probationary Evaluation is created
 - Email will contain probationary end date information
 - **ePerformance does not send reminder notifications (google calendar reflects upcoming probationary end dates)**
- Criteria only include Job Functions and Common Standards
- Does not allow employee self evaluation or participant feedback

Probationary Evaluations - Workflow



Annual vs. Probationary Evaluations

Annual

ELR ePerformance administrator creates annual performance documents according to the approval type determined by the division.

Annual performance evaluation has Functions, Goals and Common Standards tabs.

Supervisors & employees can nominate people to participate in the employee's annual performance evaluation.

Employee completes a self evaluation for annual performance evaluations.

Annual performance evaluation is first acknowledged by the employee and then approved by the approver.

Employee has the option to leave comments when acknowledging an annual performance evaluation.

Probationary

ELR ePerformance administrator creates probationary performance documents.ELR will also create the annual evaluation after probation is complete

Probationary performance evaluation only has a Functions and a Common Standards tab.

There is no option to nominate a participant for probationary performance evaluations.

Employee does not complete a self evaluation for probationary performance evaluations.

Probationary evaluation is first approved by the approver and then acknowledged by the employee.

Employee does not have an option to leave comments when acknowledging a probationary performance evaluation.

Annual Evaluation Template Types

Manager (MGR)
Approve: Approved by the supervisor's supervisor

Administrator (ADM)
Approve: Approved by divisional ePerformance Administrator

Document Type	Template ▼
SCCMP Annual Performance Docs	Non Rep Annual - MGR Approve
SCCMP Annual Performance Docs	Represent Annual - MGR Approve
SCCMP Annual Performance Docs	Represent Annual - ADM Approve
SCCMP Annual Performance Docs	Non Rep Annual - ADM Approve

VIEW ALL EE PERFORMANCE DOCUMENT

View-Only Documents

Employee Selection Criteria

Select the employee you would like to view documents for.

As Of Date

Michele S...s employees

Select	Name	Empl ID
<input type="button" value="Select"/>	<input type="checkbox"/> Sonya Zhang	1029...

View Performance Documents

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

Performance Documents									
Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Action	Manager
5050	Sonya Zhang	SCCMP Annual Performance Docs	Evaluation in Progress	SCCMP	03/02/2021	03/02/2021	EMPLOYEE REL REPR 2	Update and Submit	James Chhua
5050	Sonya Zhang	SCCMP Annual Performance Docs	Define Criteria	SCCMP	03/01/2021	03/01/2021	EMPLOYEE REL REPR 2	Update and Approve	James Chhua
050	Sonya Zhang	SCCMP Annual Performance Docs	Define Criteria	SCCMP	07/01/2020	06/30/2021	EMPLOYEE REL REPR 2	Update and Approve	Junyu Hingorani
10290050	Sonya Zhang	SCCMP Annual Performance Docs	Completed	SCCMP	07/01/2019	06/30/2020	EMPLOYEE REL REPR 2	Completed	Chris Cao

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 Performce Notes

View Approval Workflow Status

Manager Self Service

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

View Approval Status Summary

Enter some Selection Criteria and then select Search to find employees for which you are a participant in the approval process. Then, select a hyperlink to see details about the status of each transaction.

Filter Criteria

First Name Last Name

Manager First Name Last Name

Document Type Document Template ID

Period Between -

Approval Status

Performance Document

Begin Date	End Date	Name	Job Title	Document Status	Approval Status	Submitted By	2nd Level Approver	Document Type
02/08/2021	02/08/2021	Faiza Bobardt		Canceled	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/07/2021	02/07/2021	Faiza Bobardt		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/08/2021	02/08/2021	Faiza Bobardt		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/09/2021	02/09/2021	Faiza Bobardt		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/10/2021	02/10/2021	Faiza Bobardt		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/05/2021	02/05/2021	Faiza Bobardt		Completed	Approved	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
09/11/2021	09/11/2021	James Chhua		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/06/2021	02/06/2021	Faiza Bobardt		Completed	Approved	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
02/07/2021	02/07/2021	Faiza Bobardt		Canceled	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs
09/10/2021	09/10/2021	James Chhua		Approval	Submitted	Michele Soto	Renee Navickas	SCCMP Annual Performance Docs





DEFINING CRITERIA

MODULE 3



Module Objectives

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

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

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 [] Last Search Results []

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

- 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
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- View Approval Workflow Status
- Maintain Teams Performance Notes**
- Cancel Team's Performance Docs
- Reopen Teams's Performance Doc

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- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.

Supervisor Navigation

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 SCCMP

Job Code Department

SCCMP Annual Performance Docs

SCCMP Probationary Documents

Performance Documents

Employee ID	Name	Document Type	Template	Document ID	Document Status	Summary Rating
10208925	Kay Moua	SCCMP Annual Performance Docs	Non Rep Annual - ADM Approve	131003	Define Criteria	

Supervisors enters desired Filter Criteria

Supervisor Navigation

Current Performance Documents

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

Filter Criteria

First Name	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text"/>	Document Status	<input type="text"/>
Period Between	<input type="text"/> - <input type="text"/>	Department Set ID	SCCMP
Job Code	<input type="text"/>	Department	<input type="text"/>

Performance Documents Personalize | Find | | First 1-10 of 10

Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Action	Next Due Date
10273	Faiza Bobardt	SCCMP Annual Performance Docs	Evaluation in Progress	SCCMP	05/01/2021	05/16/2021	EMPLOYEE REL REPR 3	Update and Submit	06/15/2021

Select the evaluation you wish to work on

Employee Navigation

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 Last Search Results

Performance WorkCenter

Performance Management

Employee Self Service

- My Current Performance Docs
- My Historical Performance Docs
- Others Current Perform Evaln Docs
- 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

- Teams Current Performance Docs
- Team Historic Performance Docs
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- Define evaluation criteria.
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- 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 Navigation

[New Window](#) | [Help](#) | [Personalize Page](#)

Current Performance Documents

Lorenzo Lama

Listed are your current performance documents.

Performance Documents									Personalize	Find	Print	First	1-2 of 2	Last
Employee ID	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Due Date	Manager						
10200	SCCMP Probationary Documents	Define Criteria	SCCMP	03/01/2020	08/30/2020	HR GENERALIST 5	08/30/2020	Sally S. Loth						
10200	SCCMP Annual Performance Docs	Evaluation in Progress	SCCMP	06/30/2019	07/01/2020	HR GENERALIST 5	07/08/2020	Sally S. Loth						

Employee can select an evaluation by document type

Evaluation General Overview

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

Performance Process

Steps and Tasks

Faiza Bobardt
SCCMP Annual Performance Docs
05/01/2021 - 05/16/2021 [Overview](#)

- 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

SCCMP Annual Performance Docs
Manager Evaluation - Update and Share
Faiza Bobardt

Actions

Job Title	EMPLOYEE REL REPR 3	Manager	Michele Soto
Document Type	SCCMP Annual Performance Docs	Period	05/01/2021 - 05/16/2021
Template	Non Rep Annual - ADM Approve	Document ID	98381
Status	Evaluation in Progress	Due Date	06/15/2021

Employee Data

Employee ID	1027 ----	
Department	SC1005	Employee & Labor Relations
Location	SVC-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

Return to Current Documents

Evaluation details

Criteria

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
 - Pre-populated criteria about Diversity and Principles of Community
 - Cannot be modified

Define Criteria

Performance Process

Steps and Tasks

Sally S. Loth
SCCMP Annual Performance Docs
07/01/2019 - 06/30/2020 Overview

Define Criteria
Due Date 05/31/2020
Update and Approve

Nominate Participants
Due Date 06/15/2020

Review Participant Evaluations
Due Date 07/15/2020

Review Self Evaluation

SCCMP Annual Performance Docs

Define Criteria - Update and Approve

Return to Current Documents Save Approve

Print Notify Export

Actions

Job Title EMPLOYEE REL REPR 4
Document Type SCCMP Annual Performance Docs
Template Non Rep Annual - MGR Approve
Status In Progress

Manager Lorenzo Lama
Period 07/01/2019 - 06/30/2020
Document ID 58303
Due Date 05/31/2020

1. Review the performance criteria (goals and/or responsibilities) that t
2. Make any necessary adjustments to the criteria and review your cha
3. Once the performance criteria is correct select the approve button to

Criteria display on three tabs:

- Functions
- Goals
- Common Standards

To add criteria, click Add Item

Functions Goals Common Standards

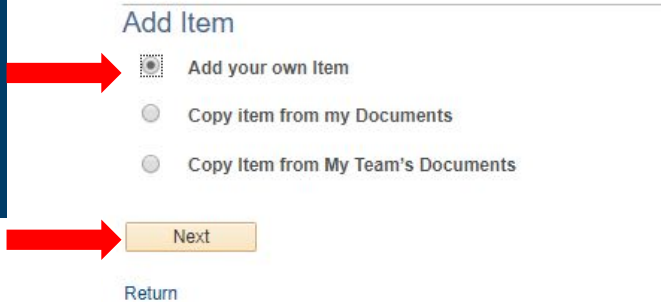
Section 1 - Job Functions

Job Functions will be evaluated by: Employee, Manager, Peer

Add Item

Define Criteria – Add Your Own Item

Add your own item
Allows you to write custom criteria



Add Item

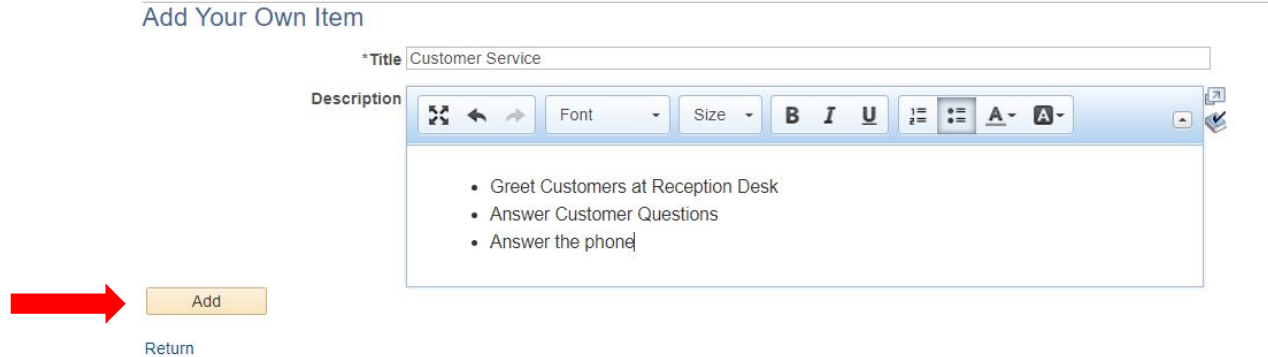
Add your own Item

Copy item from my Documents

Copy Item from My Team's Documents

Next

Return



Add Your Own Item

*Title Customer Service

Description

Font Size **B** *I* U [List icons]

- 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

Add Item

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

Next

Return

Supervisor selects one or more criteria

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

Document Type SCCANNUL

Section Job Functions

Content Type

Begin Date 07/01/2019

End Date 06/30/2020

Manager Job Functions

Personalize | Find | First 1-2 of 2 Last

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 reports’ evaluation or a previous ev to the current evaluation



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

Next

Return

Enter desired criteria to filter (make sure to indicate date range)



Performance Document
Select a Document

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

Filter Criteria

First Name Last Name

Document Type Document Status

Period Between -

Filter Clear

Performance Documents Personalize | Find | First 1-2 of 2 Last

Select	Name	Document Type	Document Status	Period Begin	Period End
Select	Tre Derjo	SCCMP Annual Performance Docs	Define Criteria	07/01/2019	06/30/2020
Select	Lorenzo Lama	SCCMP Annual Performance Docs	Define Criteria	07/01/2019	06/30/2020

Select an evaluation



Return

Define Criteria – Copy Item from My Team’s Documents

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 Sally S. Loth **Document Type** SCCANNUL
Section Job Functions **Content Type**
Begin Date 07/01/2019 **End Date** 06/30/2020

Job Functions to be copied

Personalize | Find | First 1-2 of 2 Last

Job Functions	
<input type="checkbox"/> Create Performance Management Training Materials	
<input type="checkbox"/> Create Employee Action Database	

Select All Deselect All

Copy

Cancel

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



SCCMP Annual Performance Docs [Return to Current Documents](#) [Save](#) | [Approve](#)

Define Criteria - Update and Approve

[Print](#) | [Notify](#) | [Export](#)

Created By Kermit Jun 10/19/2020 3:58PM

▼ Sloth Training

Description : Train the office sloth to fetch coffee for staff and customers. [Print](#) [Edit](#) [Delete](#)

Created By Kermit Jun 10/19/2020 3:58PM

▼ 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

[Print](#) [Edit](#) [Delete](#)

Created By Kermit Jun 10/29/2020 1:39PM

Sally S. Loth
Kermit Jun

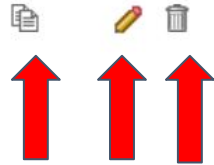
Define Criteria

▼ 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

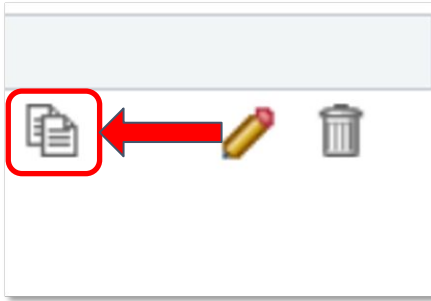
Criteria may be copied, edited or deleted



Created By Kermut Jun

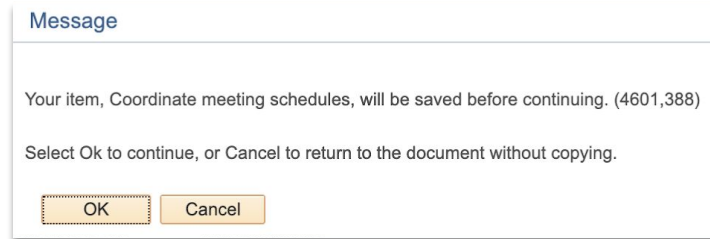
10/29/2020 1:39PM

Define Criteria – Copy to Other Documents

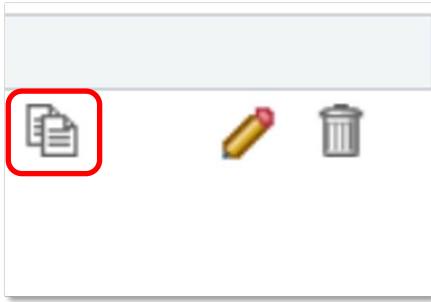


Copy to Other Documents
Supervisor can copy the current item to another performance evaluation

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



Define Criteria – Copy to Other Documents



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



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 – Learn how to braid sloth hair 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.

Performance Documents				Personalize	Find	First	1-2 of 2	Last
	Name	Job Title	Period Begin	Period End				
<input checked="" type="checkbox"/>	Kermut Jun	EMPLOYEE REL REPR 4	07/01/2019	06/30/2020				
<input checked="" type="checkbox"/>	Tre Derjos	EMPLOYEE REL REPR 2	07/01/2019	06/30/2020				

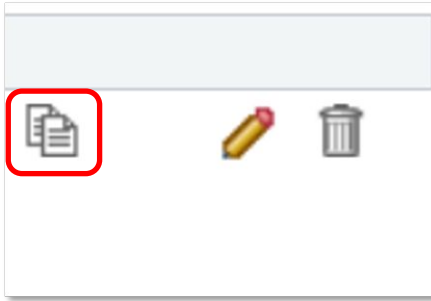
Select All

Deselect All

Continue

Return

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**

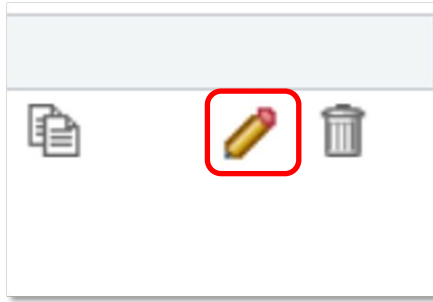
You have chosen to add the Item -- [Learn how to braid sloth hair](#) to the performance documents listed.
To confirm this assignment, select the Save button.

Performance Documents				Personalize	Find	First	1-2 of 2	Last
Name	Job Title	Period Begin	Period End					
Tre Derjos	EMPLOYEE REL REPR 4	07/01/2019	06/30/2020					
Kermut Jun	EMPLOYEE REL REPR 2	07/01/2019	06/30/2020					

Save

Return

Define Criteria – Edit



SCCMP Annual Performance Docs
Edit Goal

Supervisors can edit the title and the description

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



Update

Return

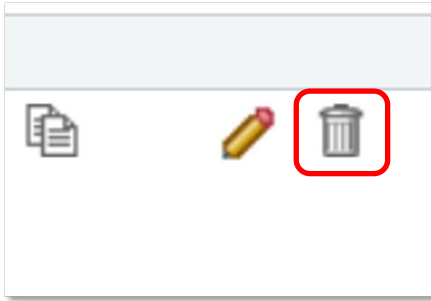
*Title

Description

Font Size **B** *I* U

- Learn appropriate calming techniques to keep sloth in place
- Research modern braiding techniques
- Create social media page to showcase sloth hairstyles
- Learn ombre technique

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

▼ **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 Kermut Jun 10/29/2020 1:39PM

Approving Criteria - Do at the end of Eval period

Return to Current Documents

Save

Approve

Click Approve to finalize criteria and move to next step

Print | Notify | Export

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

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

Supervisors can reopen (only) the last completed step if no further action has been taken



PERFORMANCE NOTES

MODULE 4



Module Objectives

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

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

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 Last Search Results

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

- 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**
- Cancel Team's Performance Docs
- Reopen Teams's Performance Doc

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.

Performance Notes

Supervisors can search for their 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



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](#)



Performance Notes – Employee Navigation

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 Last Search Results

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

- 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
- Cancel Team's Performance Docs
- Reopen Teams's Performance Doc


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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.

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	1034	Kelly Sue DeConnick	Created	02/06/2020 10:31AM
			Creator	Kermut Jun
			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](#)

BREAK TIME!





NOMINATING PARTICIPANTS

MODULE 5



Module Objectives

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

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

Participant feedback - Overview

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 provide general feedback
- Supervisors can accept or reject employee nominations
- Employees cannot view/access participant information
- A maximum of five participants per evaluation

Note: Police templates do not allow the nomination of participants

Participants - Nominating

SCCMP Annual Performance Docs

Nominate Participants - Add Nominees

Kelly Sue DeConnick

Actions ▾



Job Title CLIN OPS SHS SUPV 2

Manager Kermut Jun

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



OK

[Return to Previous Page](#)

Participants - Viewing and Acting on Nominations

SCCMP Annual Performance Docs

Nominate Participants - Add Nominees

Kelly Sue DeConnick

Actions ▾



Job Title CLIN OPS SHS SUPV 2

Manager Sally S. Loth

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



Add Peer

Supervisors can save progress...

Save

Submit Nominations

...or Submit Nominations

Names of nominees that both supervisor and employee added are listed here

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

Participants – Tracking Nominations

Supervisors can track the status of each nomination

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
[Add Nominees](#)
Track Nominations
- Review Participant Evaluations
Due Date 07/15/2020
- Review Self Evaluation
Due Date 07/07/2020
- Complete Manager Evaluation
Due Date 07/30/2020

SCCMP Annual Performance Docs

Nominate Participants - Track Nominations

Kelly Sue DeConnick
Actions



Job Title CLIN OPS SHS SUPV 2
Document Type SCCMP Annual Performance Docs
Template Non Rep Annual - MGR Approve
Status In Progress

Manager Sally S. Loth
Period 07/01/2019 - 06/30/2020
Document ID 16537
Due Date 06/15/2020

◆ Participant Role: Peer Minimum Required: 0 Maximum Available:4

Nominations

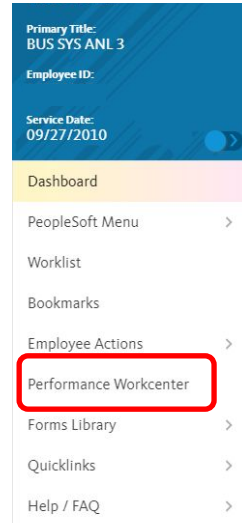
Nominee	Status	Action
Tre Derjos	Pending	Cancel

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

Pending Evaluation Requests

Nominees can select an evaluation and **Accept**

Pending Evaluation Requests		
Name	Document Type	Due Date
<input checked="" type="checkbox"/> Kelly Sue DeConnick	SCCMP Annual Performance Docs	07/15/2020

Select All Deselect All

Or Decline

Participants – Navigation

- Participants can complete the evaluation by going to **Others Current Perform Evaluations in Employee Self Service**

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 >

ORACLE

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 Evaltns
- 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

Participants can select an evaluation by employee name

My Current Evaluations for Others

✔ You have successfully accepted the selected evaluations.

Current Evaluations for Others				
Name	Document Type	Status	Period Begin	Period End
Kelly Sue DeConnick	SCCMP Annual Performance Docs	Not Started	07/01/2019	06/30/2020

Participants - Evaluation

Participants only see an employee's Functions

Participants are only able to give summary comments

Participants can save progress...

...or complete the feedback

SCCMP Annual Performance Evaluation
Kelly Sue DeConnick

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

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

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

Module Objectives

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

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

- Complete an employee self evaluation

Employee Self Evaluation - Navigation

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

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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.

Employee Self Evaluation

[New Window](#) | [Help](#) | [Personalize Page](#)

Current Performance Documents

Sally S. Loth

Listed are your current performance documents.

Performance Documents									Personalize	Find	Print	Refresh	First	1-2 of 2	Last	
Employee ID	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Due Date	Manager								
1020L----	SCCMP Probationary Documents	Define Criteria	SCCMP	03/01/2020	08/30/2020	HR GENERALIST 5	08/30/2020	Nicolas Feria								
	SCCMP Annual Performance Docs	Evaluation in Progress	SCCMP	06/30/2019	07/01/2020	HR GENERALIST 5	07/08/2020	Nicolas Feria								

Employee can select an evaluation by document type



Employee Self Evaluation


Participants can save progress...

...or complete the evaluation

SCCMP Annual Performance Docs

Self-Evaluation - Update and Complete

Print | Notify | Export

 **Job Title** BUS SYS ANL 3 **Manager** Sally S. Loth
Document Type SCCMP Annual Performance Docs **Period** 07/01/2021 - 06/30/2022
Template Non Rep Annual - MGR Approve **Document ID** 16530
Status Evaluation in Progress **Due Date** 07/07/2022

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 02/05/2020 4:09PM

Employee can leave comments for each Function or Goal



REVIEW PARTICIPANT AND EMPLOYEE EVALUATIONS

MODULE 7



Module Objectives

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

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

- Review Nominated Participant Feedback
- Review Employee's Self Evaluations

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



Reviewing Participant Evaluations and Self Evaluation

▼ Section 2 - Employee Goals

▼ Expand | ▶ Collapse | ➕ Add Goal

▼ Goal 1: Printer and copier troubleshooting

Description : Successfully provide support and complete 60 printer and copier help tickets per month

Manager Rating 5.00

Manager Comments

Writing Tools

Rich text editor toolbar with icons for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, link, and unlink. The text area contains: Kelly would often complete 80 tickets per month.

Employee Comments

Employee has not completed their self-evaluation

Created By Sally S. Loth 02/07/2020 2:27PM
Last Modified By Sally S. Loth 02/07/2020 2:28PM

▼ Goal 2: Replace department filing system

Supervisors can also see employee comments from their self evaluation under each function or goal when they are completing their evaluation of the employee



Review Participant Evaluation- Supervisor Navigation

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
- Complete Manager Evaluation
Due Date 07/30/2020

Update and Share

Supervisors can review participant evaluations



Performance Process

Participant Evaluations

Participant	Role
Sally S. Loth	Peer

Return

Select desired Participant's name to open their evaluation



View the Participant Evaluation-Supervisor

The participant evaluation opens in a new tab

ORACLE

Search

Advanced Search Last Search Results

SCCMP Annual Performance Docs

Evaluation

Actions

Job Title EMPLOYEE REL REPR 4
Document Type SCCMP Annual Performance Docs
Template Non Rep Annual - MGR Approve
Status Completed
Reviewer Kermit Jun

Manager Sally S. Loth
Period 07/01/2021 - 06/30/2022
Document ID 84071
Due Date 07/15/2022
Role Peer

Group box 15

Rating History

The document status is Completed.

Reopen

Section 1 - Job Functions

Expand Collapse

Sloth-sitting

Description:

- Ensure adequate sloth nutrition
- Keep sloth away from electrical outlets
- Clean up after the sloth

Created By: Nicolas Feria 04/29/2021 2:20PM

Job Functions Summary

Comments: Unacceptable! She fed my sloth snickers!

Manager reviews overall participant job function summary

ORACLE

Performance Process

Home Worklist Add to Favorites

ORACLE

New Window

Participant Evaluations

Participant	Role
Sally S. Loth	Peer

Return

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

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

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

- Complete the Manager Evaluation

Complete Manager 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
- Complete Manager Evaluation**
Due Date 07/30/2020
[Update and Share](#)

Enter
Manager
Evaluation

SCCMP Annual Performance Docs
Manager Evaluation - Update and Share

Functions | Goals | Common Standards | Overall Summary

Section 1 - Job Functions

Expand | Collapse | Add Item

Sloth-sitting

Description:

- Ensure adequate sloth nutrition
- Keep sloth away from electrical outlets
- Clean up after the sloth

Manager Rating: 0.00

Manager Comments

Employee Comments: Employee has not completed their self-evaluation

Created By: Nicolas Feria 04/26/2021 2:20PM

Job Functions Summary

Manager Rating: 0.00 Override

Participant Feedback

Participant	Role	Comments
Sally S. Loth	Peer	Unacceptable! She fed my sloth snickers!

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

Complete Manager Evaluation – Ratings and Comments

The **Manager Rating** is required

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

▼ **Coordinate meeting schedules**

Description : Coordinate department meeting schedule with little to no supervision

Manager Rating 3 - Met Expectations 3.00

Manager Comments

Writing Tools

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

Each rating has an associated value

Complete Manager Evaluation – Tab Summary

Overall Manager Rating section

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

Job Functions Summary

Manager Rating 5 - Exceptional

4.00

Override

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

...or Share with Employee

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.



Employee Acknowledges Evaluation

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

Performance Process

Steps and Tasks

Sally S. Loth
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**

Print | Notify | Export

Manager Evaluation - Acknowledge
Iman N. Terlopa

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

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

Employee Data

Empl ID 102C
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!

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

Acknowledgement Override

SCCMP Probationary Documents

Return to Current Documents Save Override Acknowledgement

Manager Evaluation - Share with Employee

Kelly Sue DeConnick

Print Notify Export

Actions

Job Title CLIN OPS SHS SUPV 2 Manager Rhoi Rhc
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 1034
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 can select the Override Acknowledgement button to override the employee's acknowledgement.

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 acknowledgement, then confirms

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

Submit for Approval

SCCMP Probationary Documents

Manager Evaluation - Update and Submit

Kelly Sue DeConnick

Actions ▾



Job Title CLIN OPS SHS SUPV 2
Document Type SCCMP Probationary Documents
Template Probation Review - MGR Approve
Status Evaluation in Progress
Period 07/01/2022 - 06/30/2023
Document ID 16539
Due Date 04/01/2023

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



Submit for Approval

Print | Notify | Export

Employee Data

Empl ID 10:
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

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

Approve Documents

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

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

Select Transaction to Approve

Whenever Managers access this Page, they have to enter Document Type to filter Pending Approvals.

Filter Criteria

First Name	<input type="text"/>	Last Name	<input type="text"/>
Manager First Name	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text" value="SCCANNUL"/>	Document Template ID	<input type="text"/>
Period Between	<input type="text"/>	<input type="text"/>	

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

Select desired evaluation(s), then approve or deny

	Empl ID	Name	Job Title	Department	Document ID	Begin Date	End Date	Document Status	Approval Status	Submitted By	2nd Level Approver	Document Type	Summa
<input type="checkbox"/>	10273	Aldo Gunawarman	BROADCAST COMM SPEC 4	SC4036	98348	07/02/2022	07/03/2022	Approval	Pending Approval	Julie Thompson	Tomer Deguzman	SCCMP Annual Performance Docs	3 - Met Expect



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.



VIEW PERFORMANCE DOCUMENTS

MODULE 9



Module Objectives

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

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

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 >

Performance Workcenter > Performance Workcenter

ORACLE

All Search >> Advanced Search Last Search Results

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

- 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
- Cancel Team's Performance Docs
- Reopen Teams's Performance Doc

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.

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>

[UPDATED FAQ](#)

ePerformance Training Sessions

ePerformance System:

- Full Tool Navigation
- Administrator Training (open to authorized divisional users - (Full Tool Navigation is the prerequisite for this course))

ePerformance Content training:

- Part 1: Defining Criteria (held in the Fall)
- Part 2: Completing the Manager Evaluation (held in Spring)

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!

