# 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

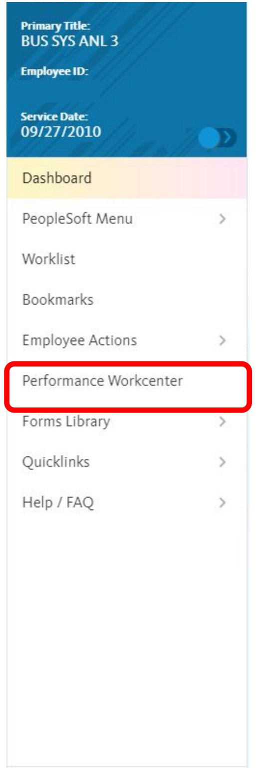
# Module Objectives

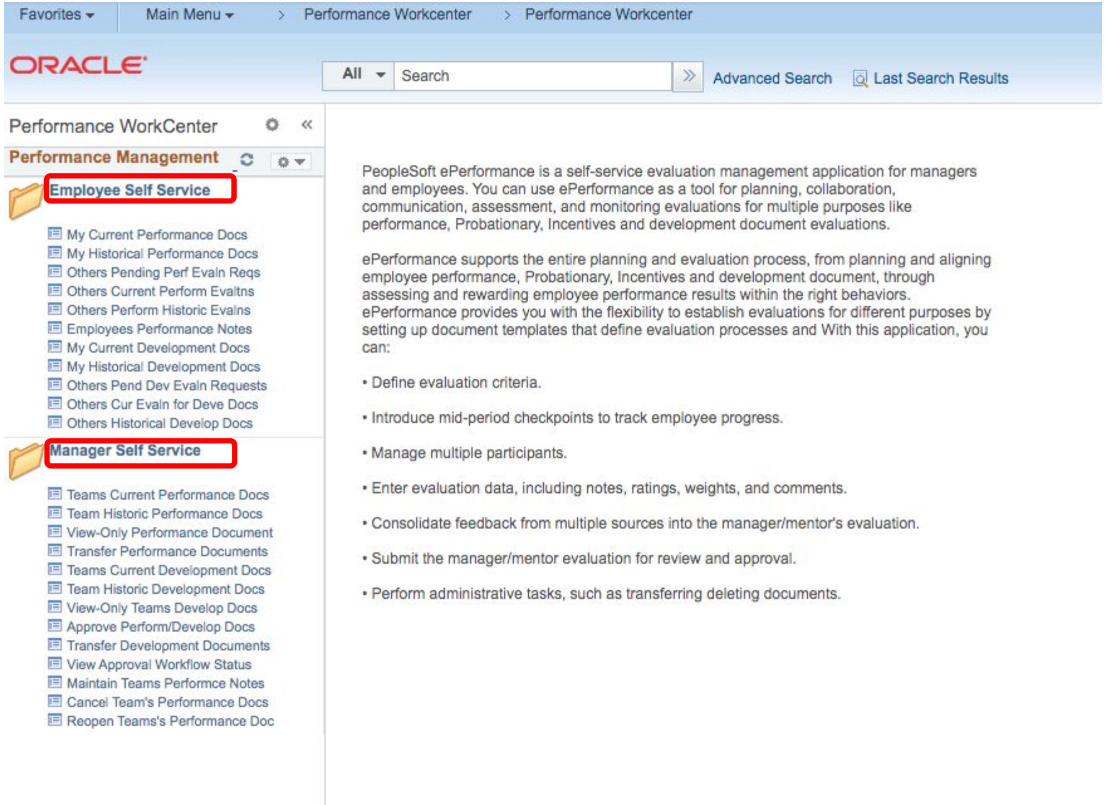


At the end of this module you should understand the following:

- 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

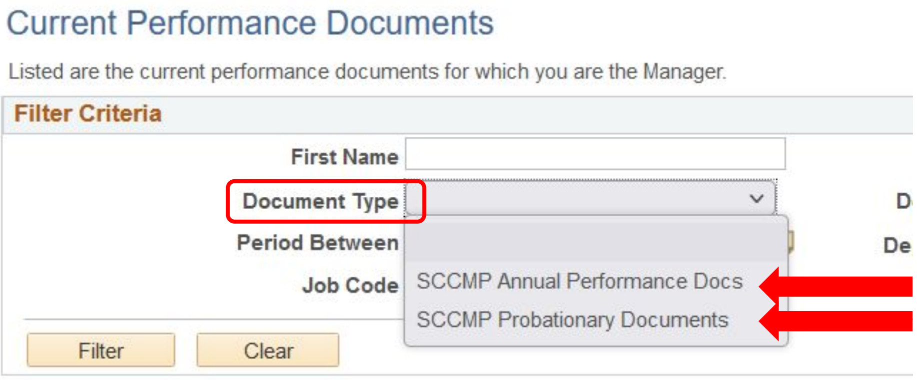
# Performance Workcenter – Navigation



# 2 Document Types

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



# Annual Performance Evaluations

- Created by ELR ePerformance administrator at the beginning of the performance cycle*
- Assigned to the supervisor based on position hierarchy
- Supervisor and Employee receive email notification only when a performance evaluation has been created
    - **ePerformance does not send reminder notifications**
- Define Criteria step may be started when the evaluation is created, and finalized and approved at the end of the performance cycle, just before nominating participants/employee evaluation steps

# Annual Performance Evaluations - Workflow

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

# Probationary Evaluations

- Created by ELR ePerformance Administrator upon hire. Then ELR creates annual evaluations after probation is completed
- Assigned to 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

1. ELR ePerformance Administrator in SHR Creates Probationary Performance Documents
2. Supervisor Defines Criteria
3. Supervisor Completes Probationary Evaluation
4. Supervisor Submits Probationary Evaluation for Approval
5. Approver Approves Probationary Evaluation
6. Supervisor Shares Evaluation with Employee
7. Employee Acknowledges Probationary Evaluation

# Annual vs. Probationary Evaluations

| Annual | Probationary |
|---|---|
| **ELR ePerformance administrator** creates annual performance documents according to the approval type determined by the division. | **ELR ePerformance administrator** creates probationary performance documents.ELR will also create the annual evaluation after probation is complete |
| Annual performance evaluation has Functions, Goals and Common Standards tabs. | Probationary performance evaluation only has a Functions and a Common Standards tab. |
| Supervisors & employees can nominate people to participate in the employee's annual performance evaluation. | There is no option to nominate a participant for probationary performance evaluations. |
| Employee completes a self evaluation for annual performance evaluations. | Employee does not complete a self evaluation for probationary performance evaluations. |
| Annual performance evaluation is first acknowledged by the employee and then approved by the approver. | Probationary evaluation is first approved by the approver and then acknowledged by the employee. |
| Employee has the option to leave comments when acknowledging an annual performance evaluation. | 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

**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-Only Documents

**Employee Selection Criteria**

Select the employee you would like to view d uments for.

As Of Date 09/10/2021 | Refresh Employees

**Michele S s employees**

| Select | Name | Empl ID |
|---|---|---|
| Select | Sonya Zhang | 1029[illegible] |

## View Performance Documents

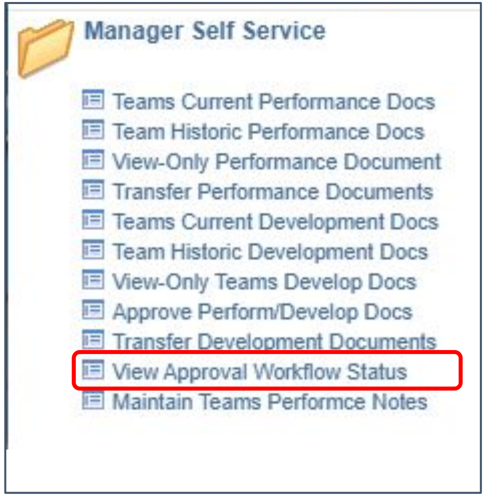
Listed are all the performance docu ts for the employee you selected.

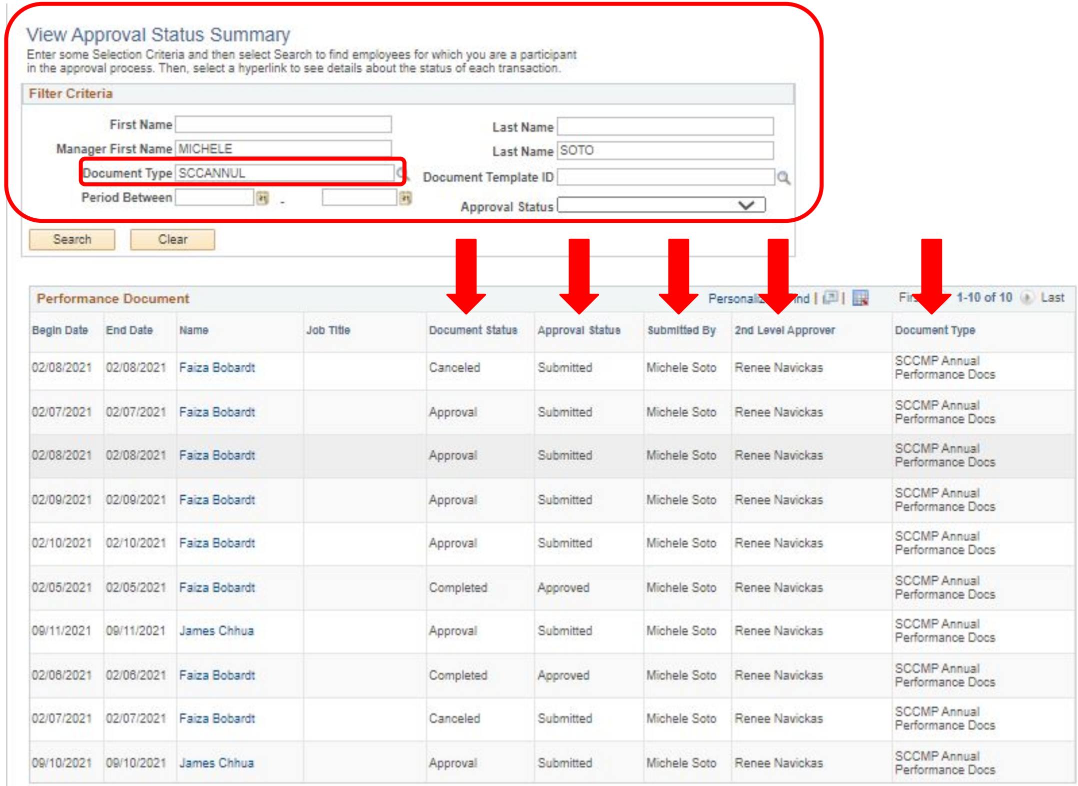
**Performance Documents**

Personaliz Find |

| 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 |
| 10[illegible]50 | Sonya Zhang | SCCMP Annual Performance Docs | Completed | SCCMP | 07/01/2019 | 06/30/2020 | EMPLOYEE REL REPR 2 | Completed | Chris Cao |

# View Approval Workflow Status





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: MICHELE
Last Name: SOTO
Document Type: SCCANNUL
Document Template ID:
Period Between: -
Approval Status:

Search | Clear

Performance Document

1-10 of 10 Last

| 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

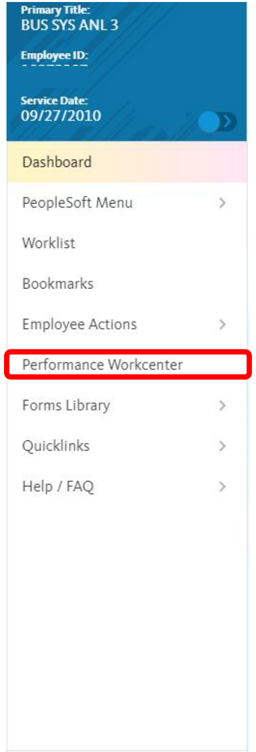
# Module Objectives

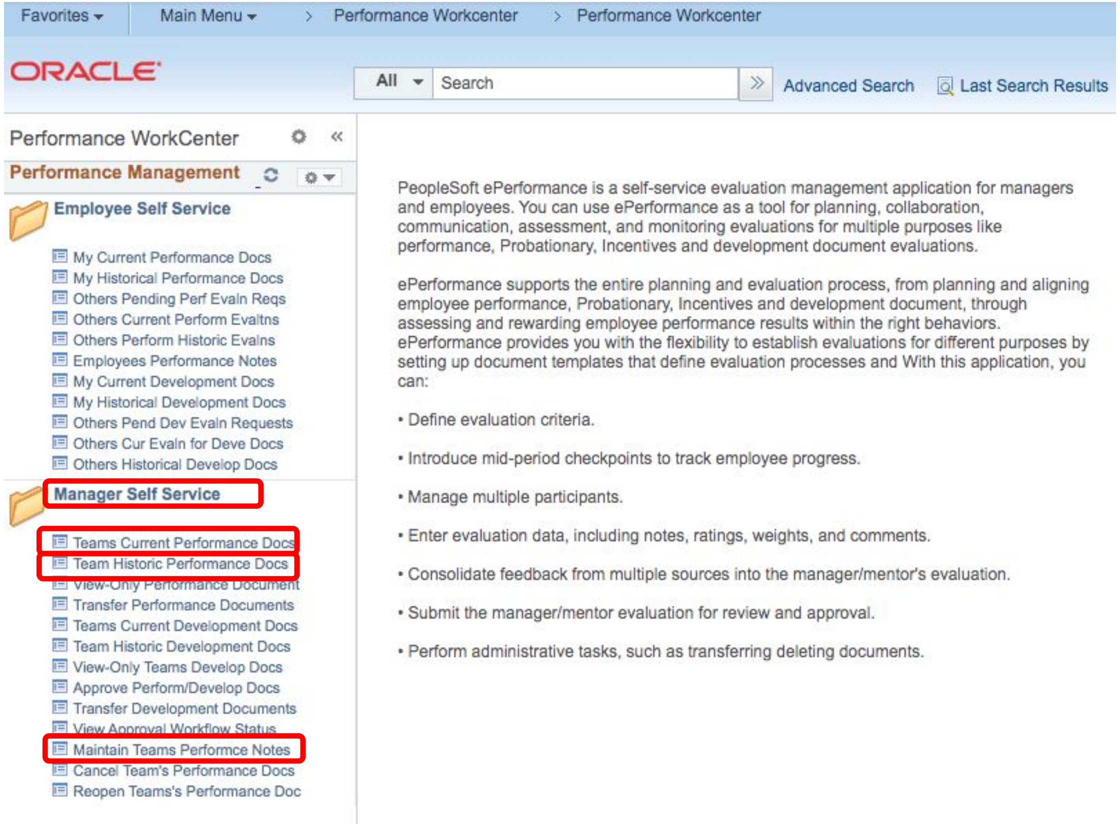


At the end of this module you should be able to do the following:

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

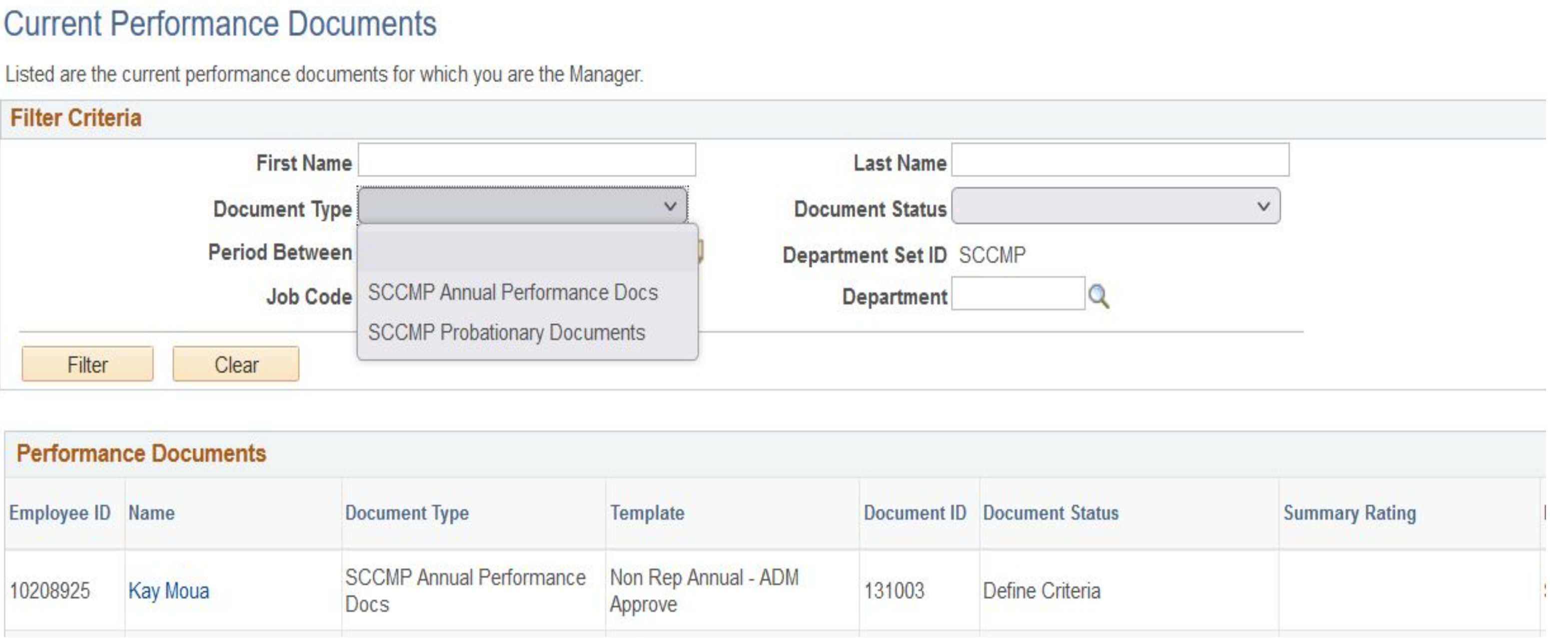
# Supervisor Navigation



# Supervisor Navigation

Supervisors enters desired Filter Criteria






UC SANTA CRUZ

# Supervisor Navigation

Select the evaluation you wish to work on

## 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

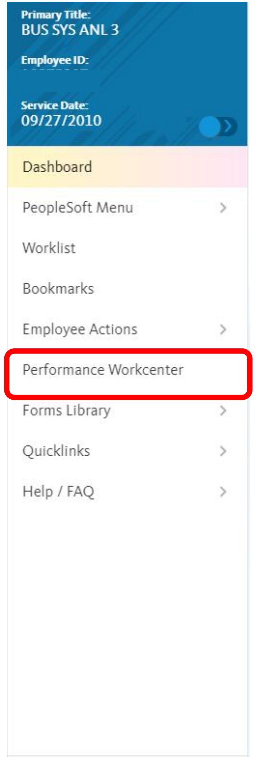
Filter | Clear

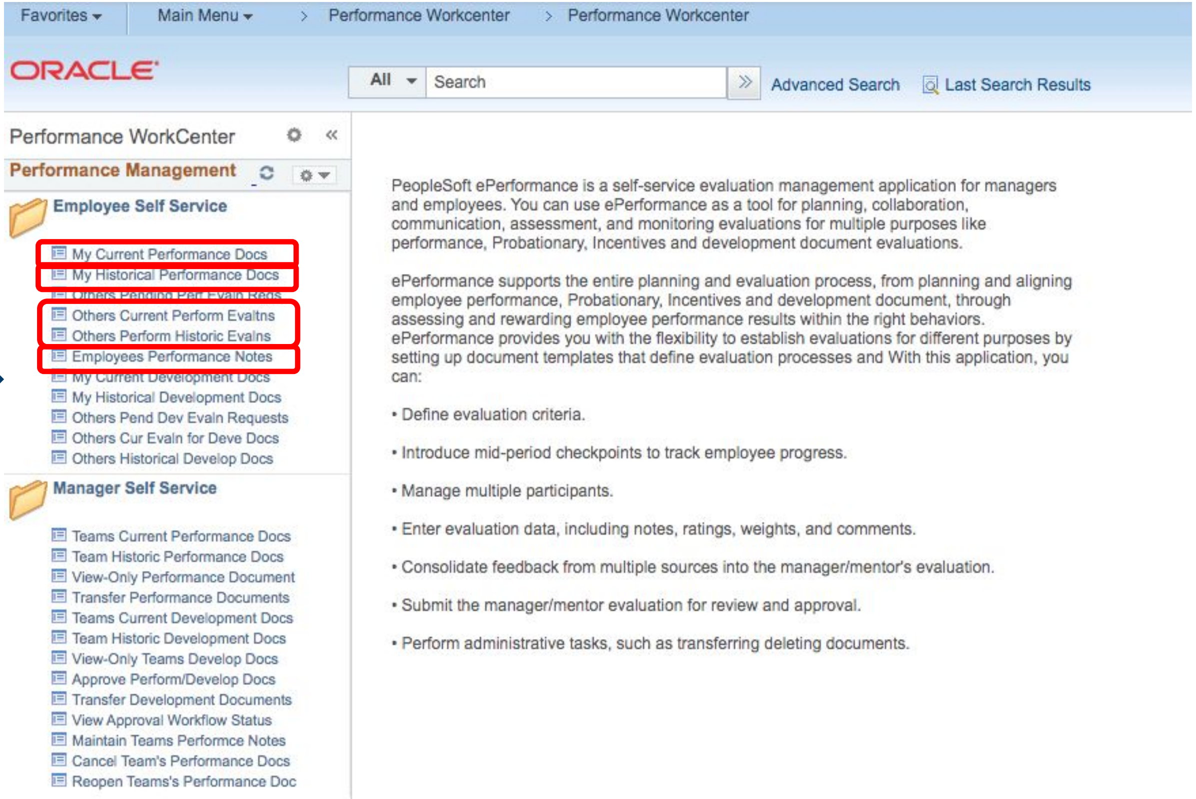
**Performance Documents**

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 |

# Employee Navigation



# Employee Navigation

Employee can select an evaluation by document type

New Window | Help | Personalize Page

## Current Performance Documents

Lorenzo Lama

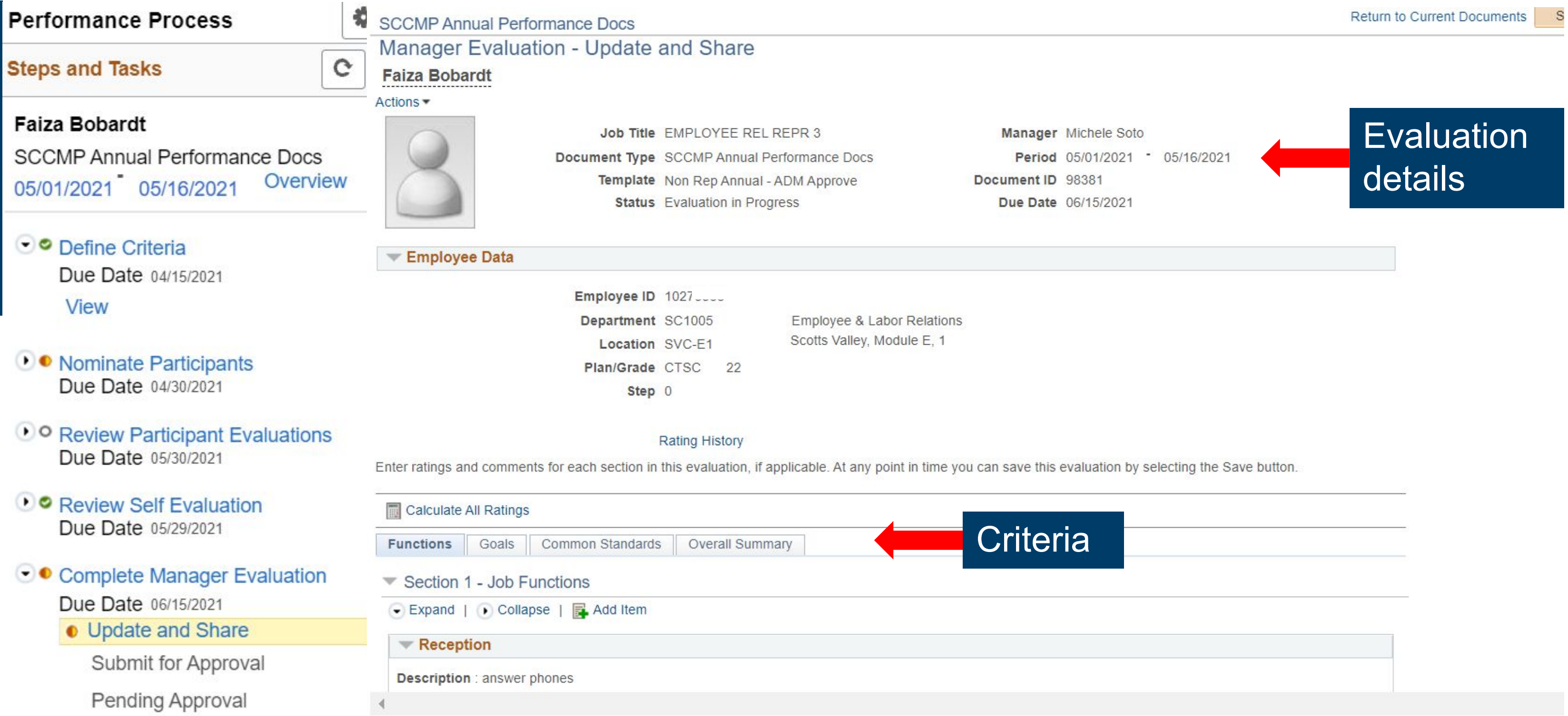
Listed are your current performance documents.

**Performance Documents** Personalize | Find | 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 |

# Evaluation General Overview

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




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 <u>current</u> performance cycle
- **Common Standards** tab
  - Pre-populated criteria about Diversity and Principles of Community
  - Cannot be modified

# Define Criteria

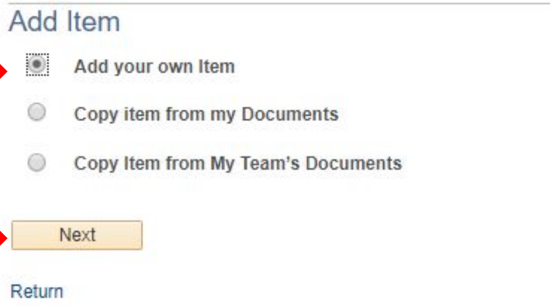

Criteria display on three tabs:

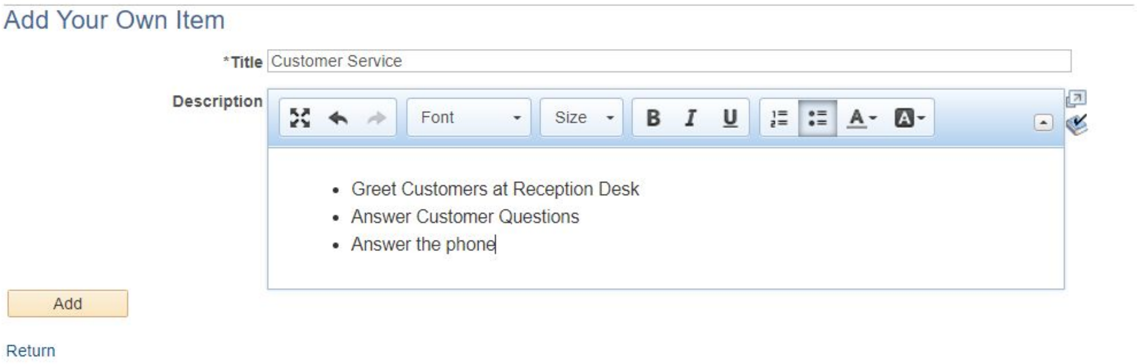
- Functions
- Goals
- Common Standards

To add criteria, click **Add Item**

# Define Criteria – Add Your Own Item

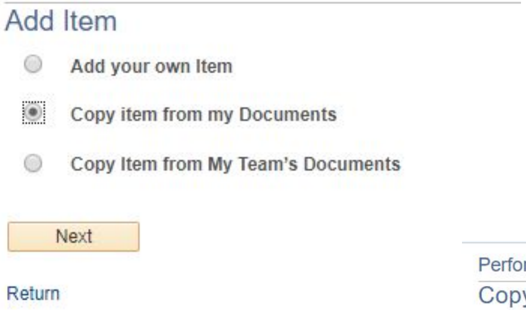
**Add your own item**
Allows you to write custom criteria



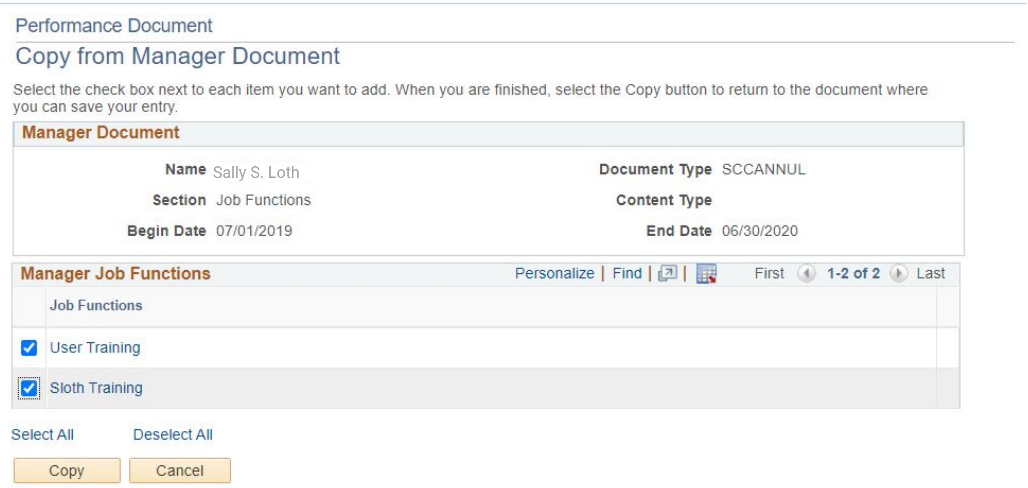



# Define Criteria – Copy Item from My Documents

**Copy item from my Documents**
Supervisors can add an item from their own evaluation to an employee's




Supervisor selects one or more criteria



# 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 |
|---|---|
| ☐ | Create Performance Management Training Materials |
| ☐ | Create Employee Action Database |

Select All Deselect All

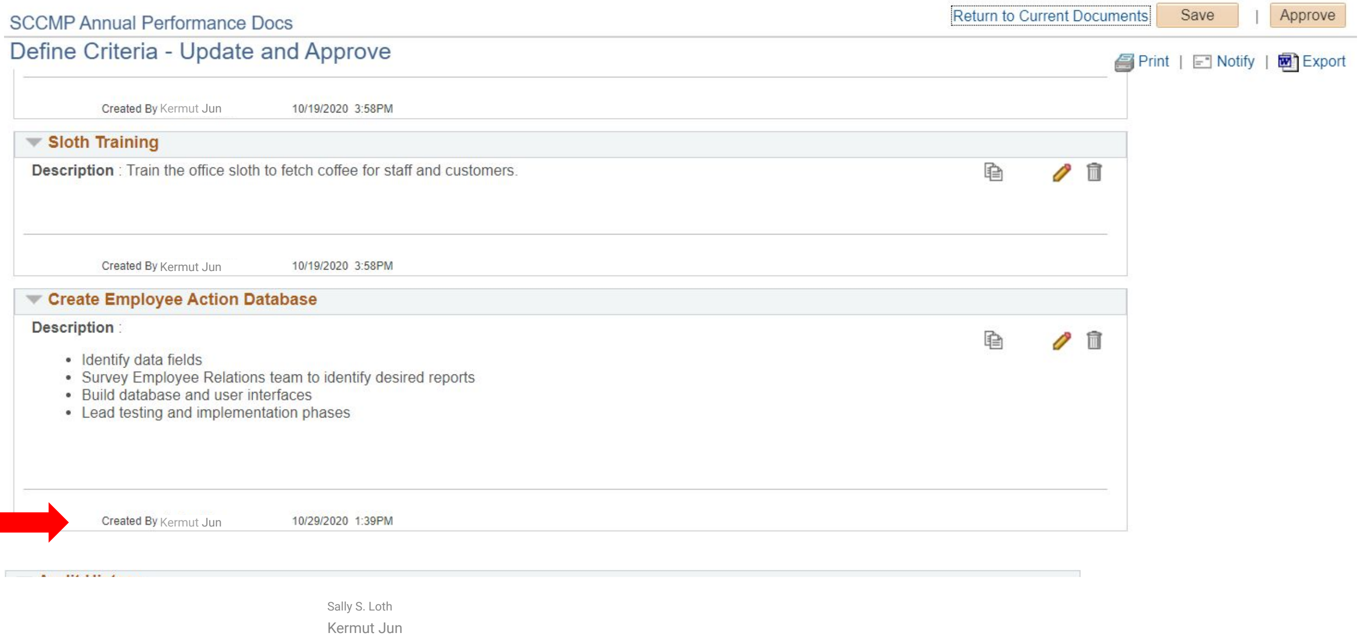
Copy Cancel

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



# Define Criteria

**Create Employee Action Database**

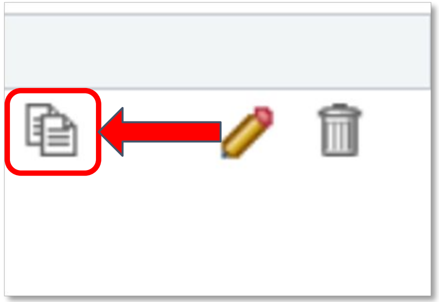
**Description** :

- 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

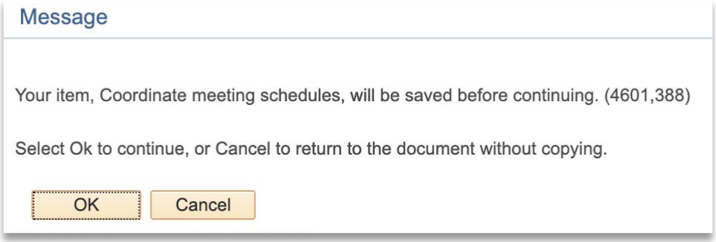
Created By Kermut Jun    10/29/2020 1:39PM

# Define Criteria – Copy to Other Documents

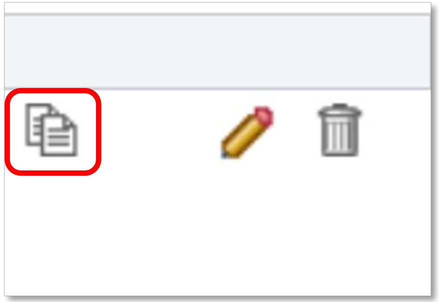


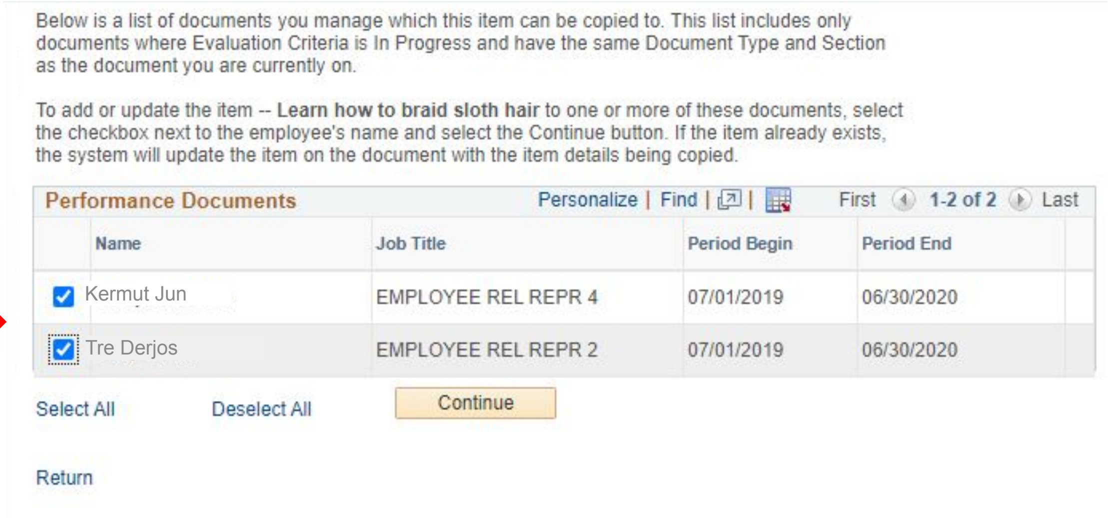
**Copy to Other Documents**
Supervisor can copy the current item **to** another performance evaluation

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



# Define Criteria – Copy to Other Documents





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

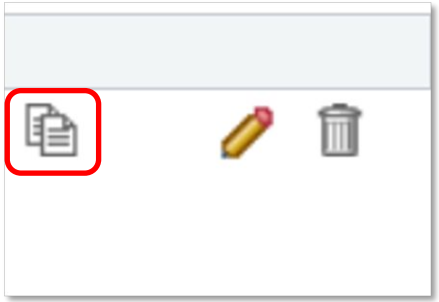
| | Name | Job Title | Period Begin | Period End |
|---|---|---|---|---|
| ☑ | Kermut Jun | EMPLOYEE REL REPR 4 | 07/01/2019 | 06/30/2020 |
| ☑ | Tre Derjos | EMPLOYEE REL REPR 2 | 07/01/2019 | 06/30/2020 |

Select All   Deselect All   Continue

Return

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

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

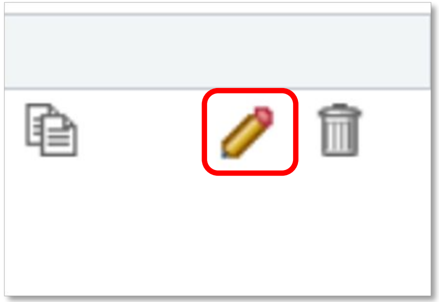
| Name | Job Title | Period Begin | Period End |
|---|---|---|---|
| Tre Derjos | EMPLOYEE REL REPR 4 | 07/01/2019 | 06/30/2020 |
| Kermut Jun | EMPLOYEE REL REPR 2 | 07/01/2019 | 06/30/2020 |

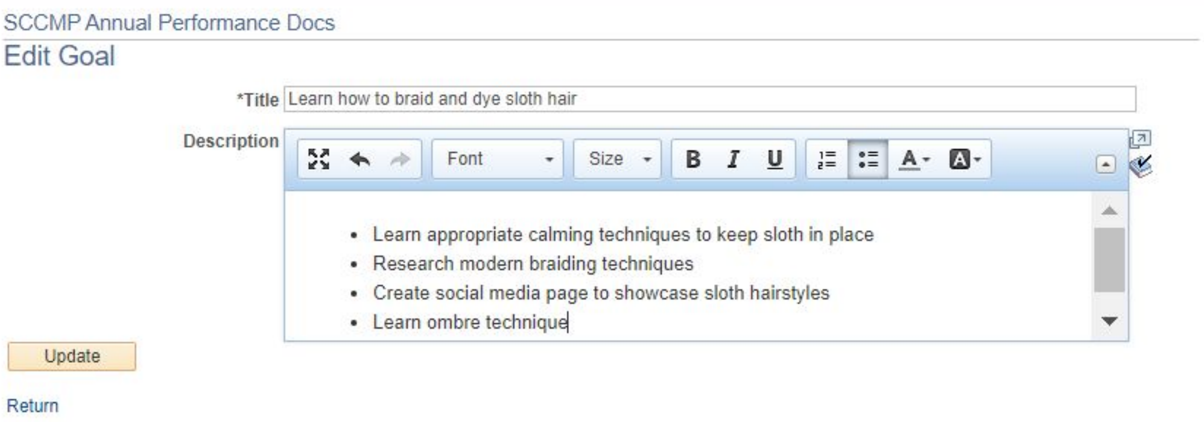
Save

Return

Supervisors confirm the action by clicking **Save**

# Define Criteria – Edit

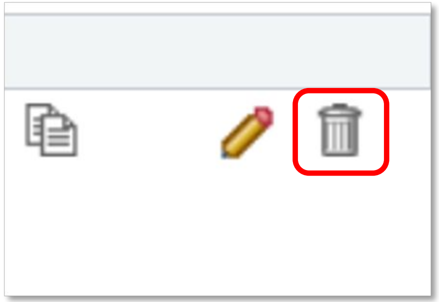




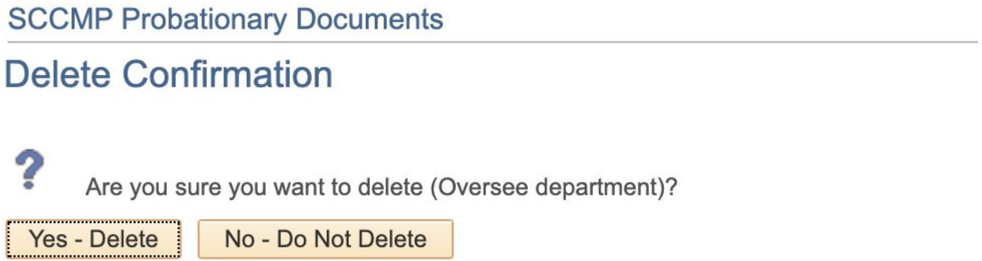

Supervisors can edit the title and the description

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

# Define Criteria – Delete



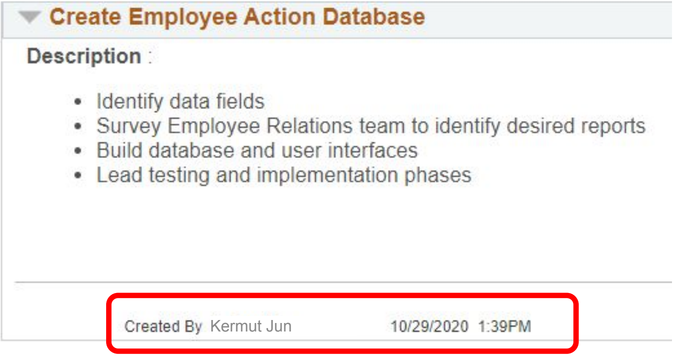
Supervisors can delete an existing item




Supervisors are prompted to confirm the deletion

# Define Criteria

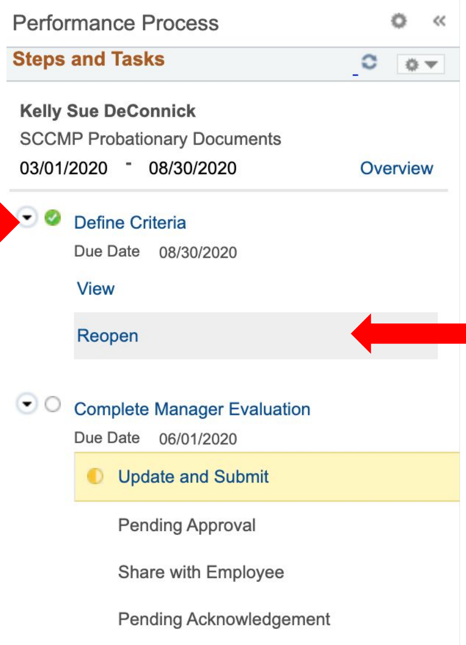
- During the Define Criteria step, employees and supervisors are both able to add items to the evaluation, and to edit existing items, as determined by the supervisor
- The author's name will display at the bottom of newly added item following the words "Created By"
- The author's name will display at the bottom of an item when criteria is modified, following the words "Last Modified By"




- Employees are able to delete items that they themselves added to the evaluation, but cannot delete items added by their supervisor

# Approving Criteria - Do at the end of Eval period


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 if no further action has been taken

## PERFORMANCE NOTES

# MODULE 4

# Module Objectives



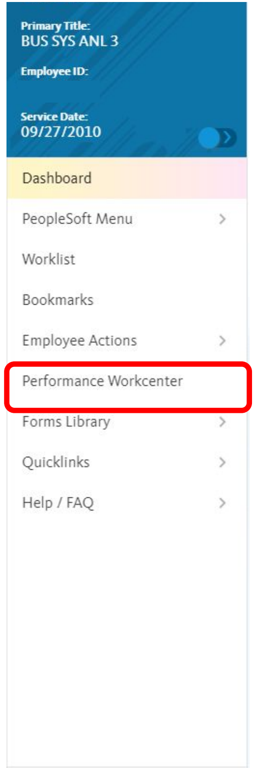
At the end of this module you should be able to do the following:

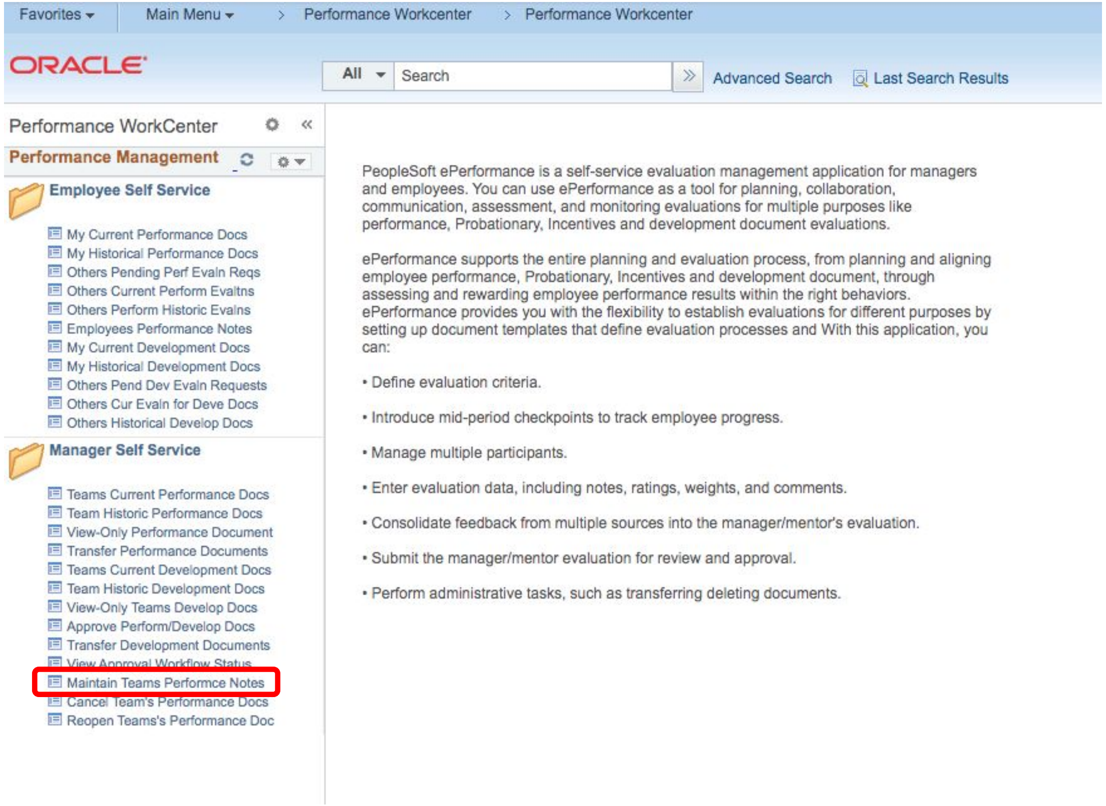
- Create and edit performance notes

# 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.**

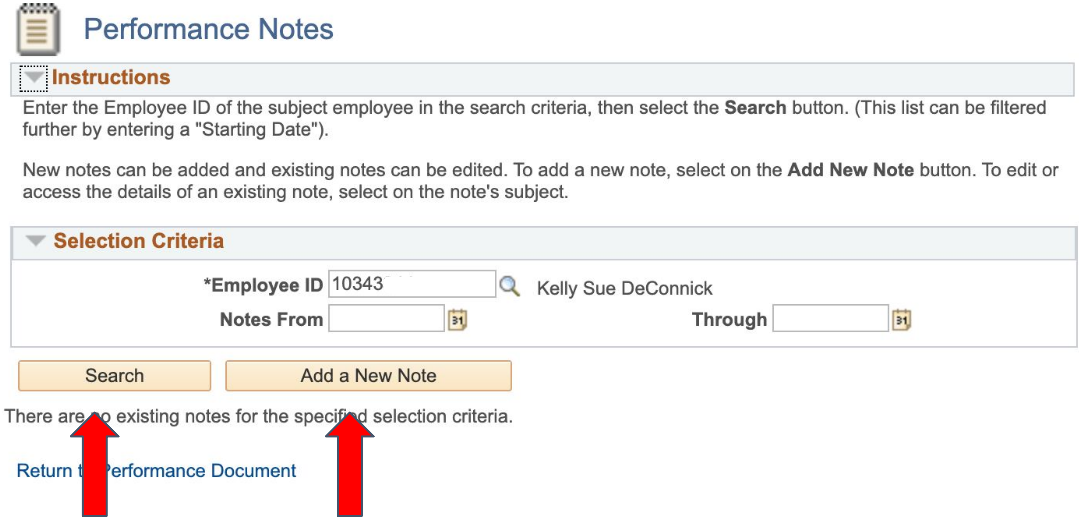
# Performance Notes – Supervisor Navigation



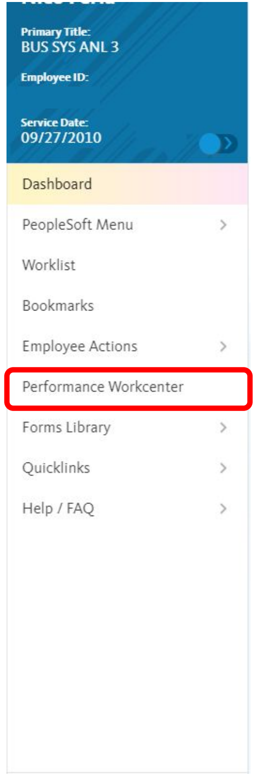



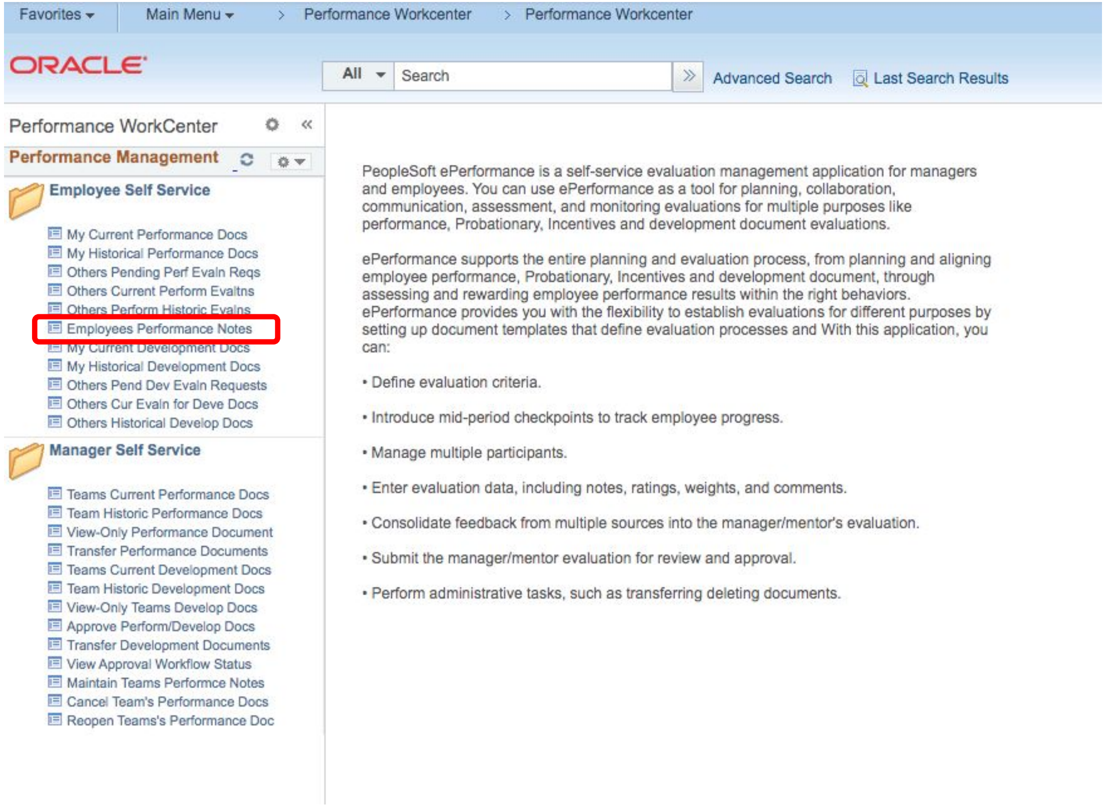
# Performance Notes

Supervisors can search for their performance notes by employee ID and date range, or they can add a new note



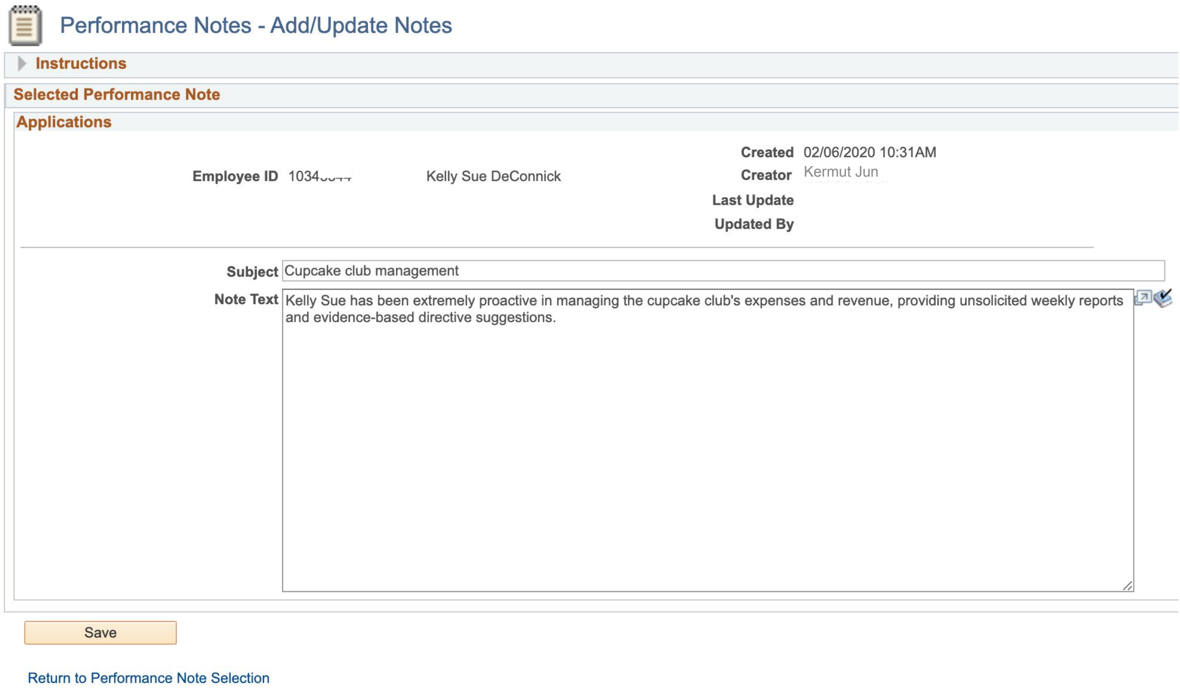
# Performance Notes – Employee Navigation



# Performance Notes

- Performance Notes consist of a Subject and Note Text
- When viewing an existing performance note, supervisors can edit or add to the note



# BREAK TIME!

NOMINATING PARTICIPANTS

# MODULE 5

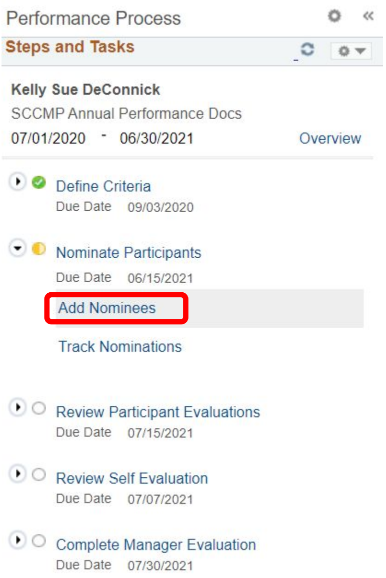
# Module Objectives



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

# Participant feedback - Overview




- 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

Document Type SCCMP Annual Performance Docs

Template Non Rep Annual - MGR Approve

Status In Progress

Manager Kermut Jun

Period 07/01/2020 - 06/30/2021

Document ID 16527

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

Person Search

Nominate Participants

Instructions

Search Criteria

Last Name FRACTION

Business Unit

First Name

Search

Search Results

Matthew Fraction

OK

Return to Previous Page

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

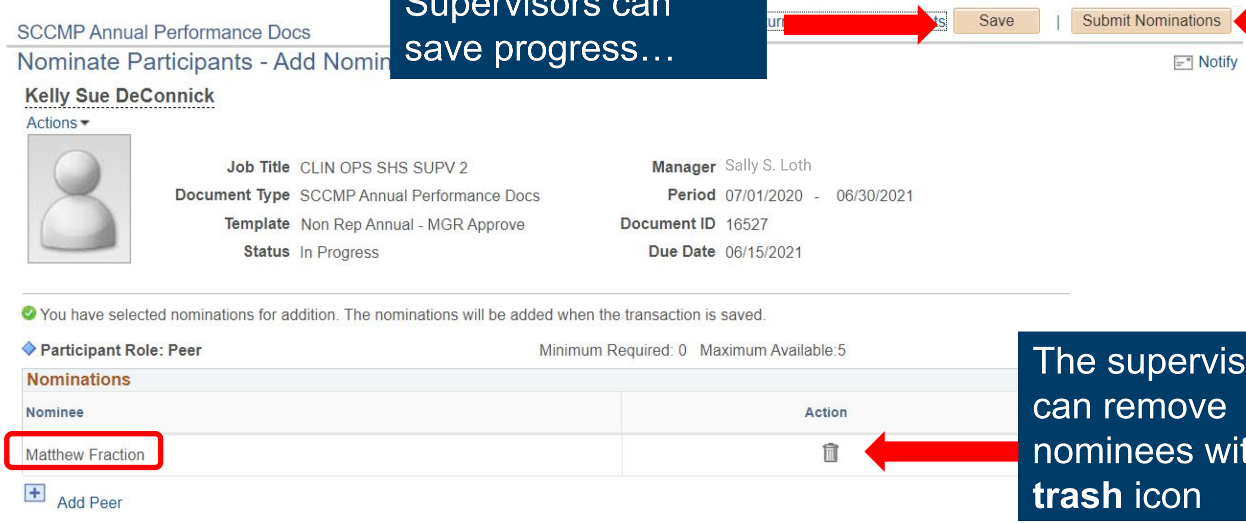
Select the desired nominee

Click **OK**

# Participants - Viewing and Acting on Nominations

Supervisors can save progress…

…or **Submit Nominations**



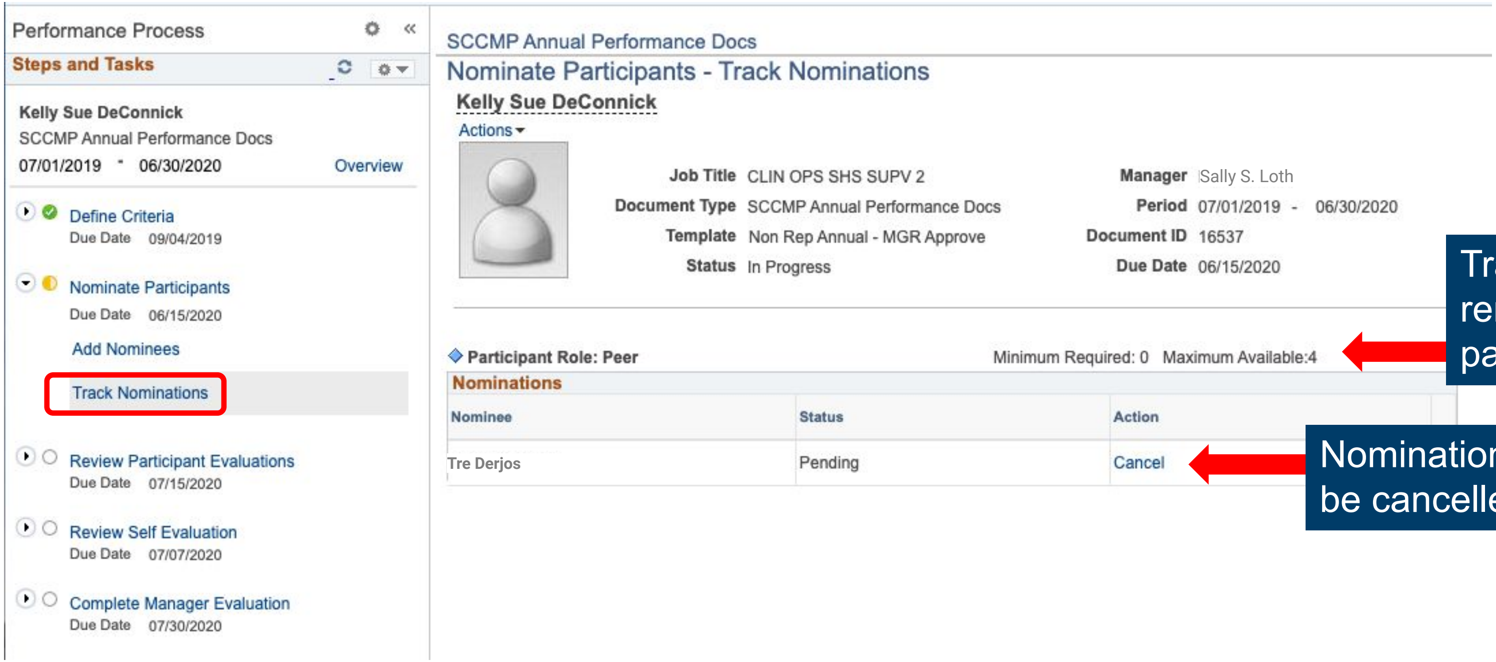

Names of nominees that both supervisor and employee added are listed here

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



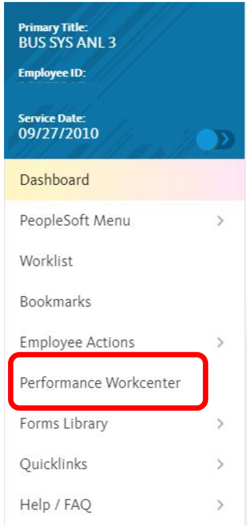

Tracks # of remaining participants

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

Pending Evaluation Requests

**Pending Evaluation Requests**

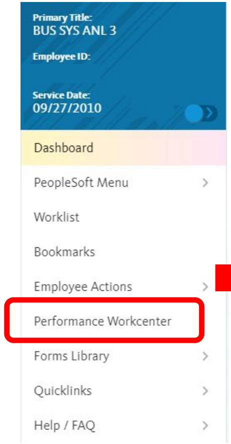
| | Name | Document Type | Due Date |
|---|---|---|---|
| ☑ | Kelly Sue DeConnick | SCCMP Annual Performance Docs | 07/15/2020 |

Select All Deselect All

Accept Decline

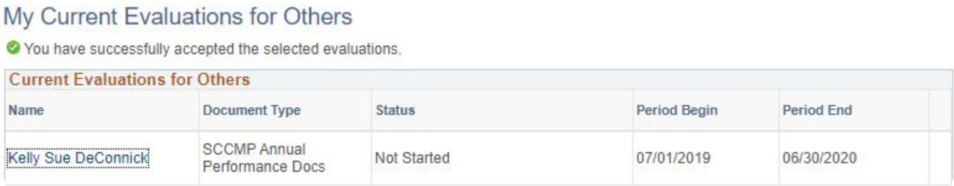
# Participants – Navigation

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





Participants can select an evaluation by employee name




| Name | Document Type | Status | Period Begin | Period End |
|---|---|---|---|---|
| Kelly Sue DeConnick | SCCMP Annual Performance Docs | Not Started | 07/01/2019 | 06/30/2020 |

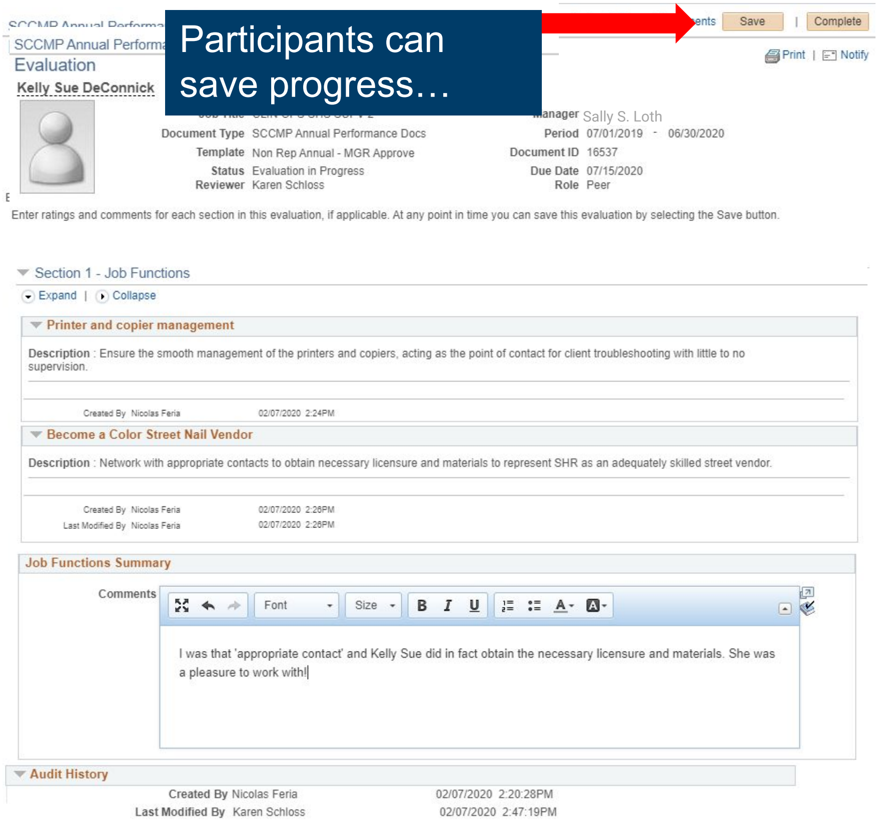
# Participants - Evaluation

Participants can save progress…

…or **complete the feedback**

Participants only see an employee's Functions

Participants are only able to give summary comments



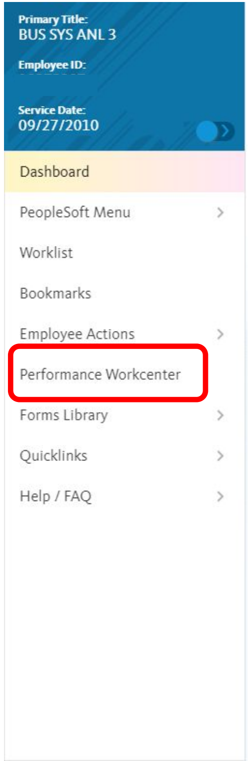
# Module Objectives

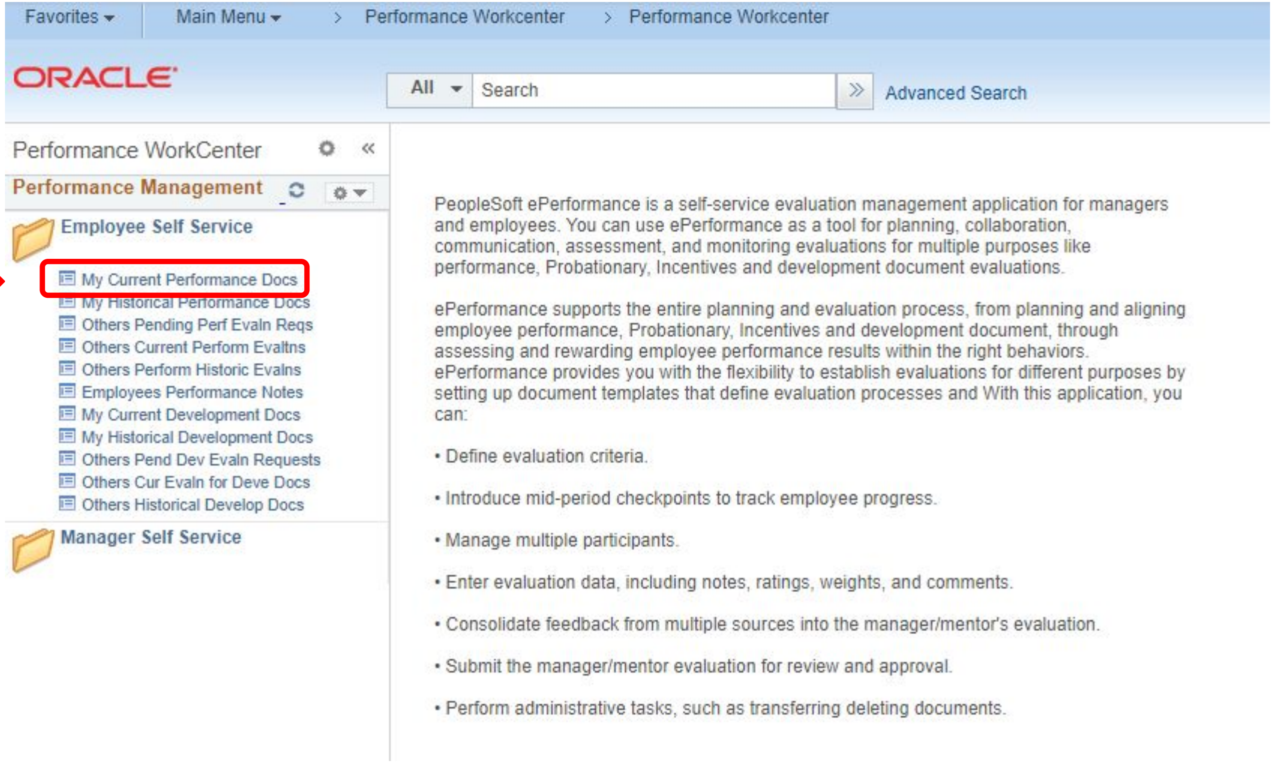
- 01. ePerformance Overview
- 02. Defining Criteria
- 03. Performance Notes
- 04. Nominating Participants
- 05. Employee Self Evaluation
- 06. Review Participant and Employee Evaluations
- 07. Completing the Manager Evaluation
- 08. View Historical Performance Evaluations

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

- Complete an employee self evaluation

# Employee Self Evaluation - Navigation



# Employee Self Evaluation

New Window | Help | Personalize Page

## Current Performance Documents

Sally S. Loth

Listed are your current performance documents.

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

| Employee ID | Document Type | Document Status | Business Unit | Period Begin | Period End | Job Title | Next Due Date | Manager |
|---|---|---|---|---|---|---|---|---|
| 1020___ | 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 |

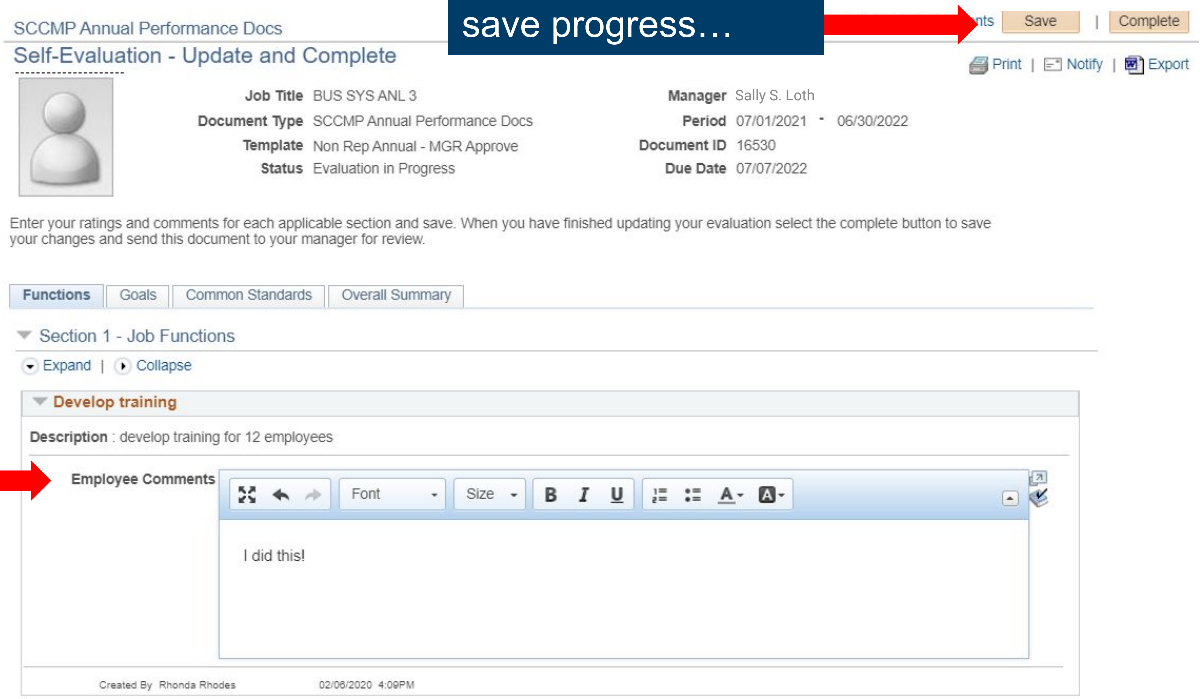
Employee can select an evaluation by document type

# Employee Self Evaluation

Participants can save progress…

…or **complete the evaluation**

Employee can leave comments for each Function or Goal



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REVIEW PARTICIPANT AND EMPLOYEE EVALUATIONS

# MODULE 7

# Module Objectives

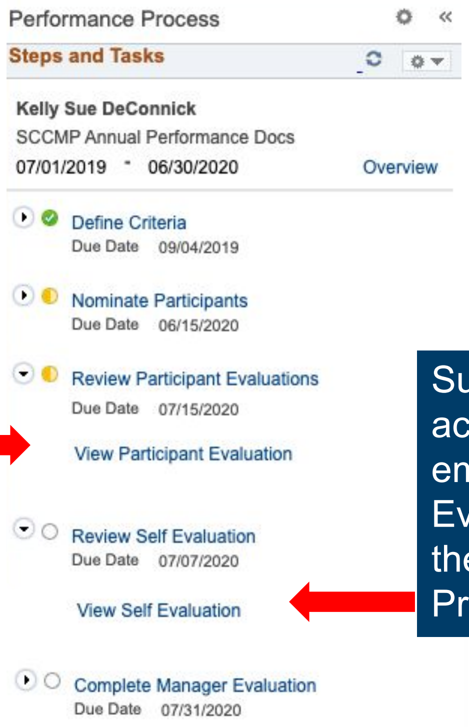


At the end of this module a manager should be able to do the following:

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

# Reviewing Participant Evaluations and Self Evaluation

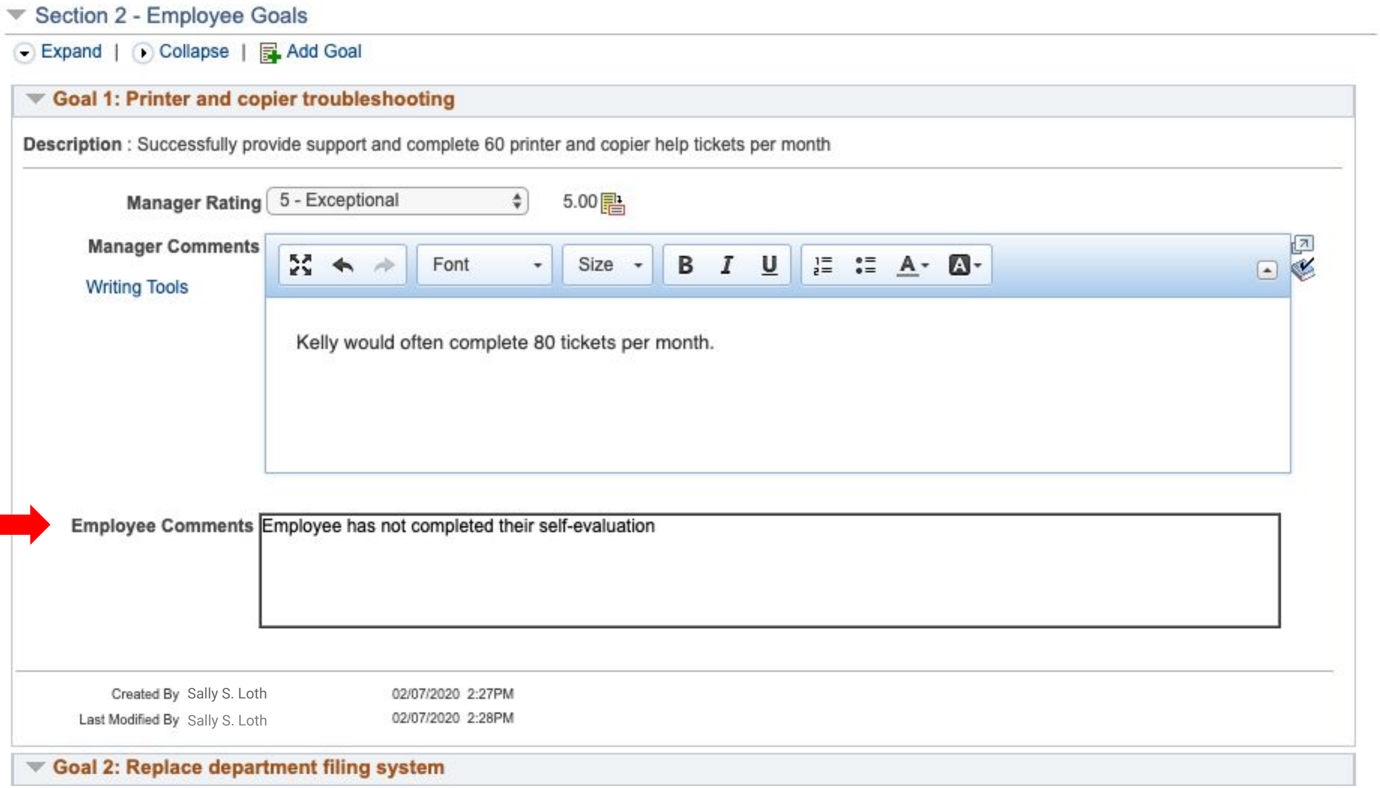
Supervisors can access Participant Evaluations from the Performance Process bar




Supervisors can access the employee’s Self Evaluation from the Performance Process bar

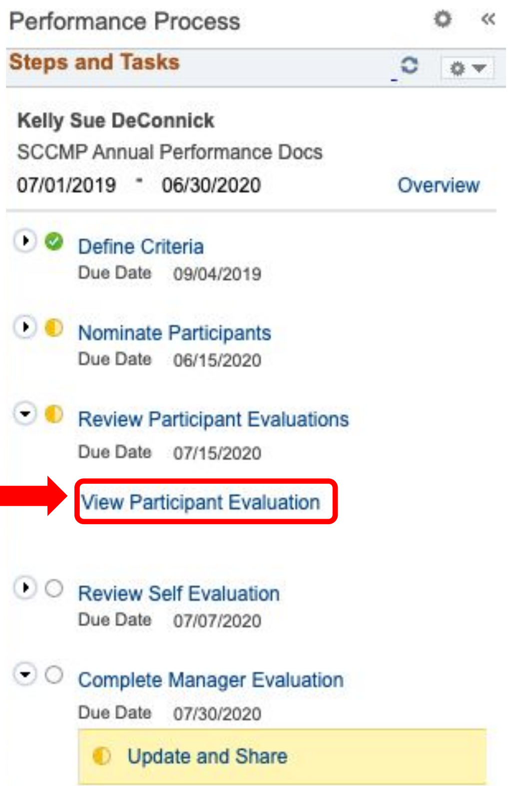
# Reviewing Participant Evaluations and Self Evaluation

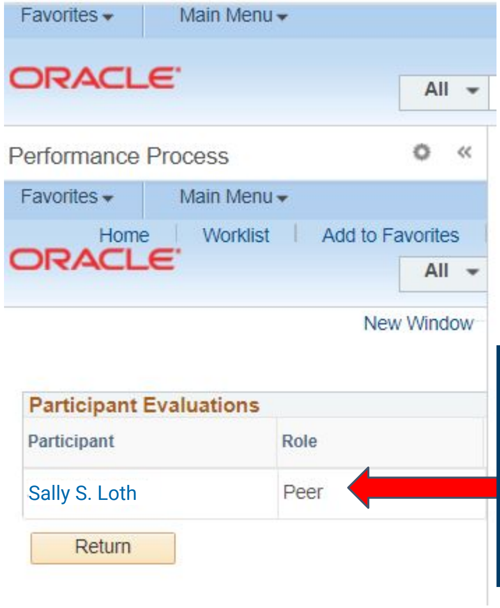
Supervisors can also see employee comments from their self evaluation under each function or goal when they are completing their evaluation of the employee



# Review Participant Evaluation- Supervisor Navigation

Supervisors can review participant evaluations

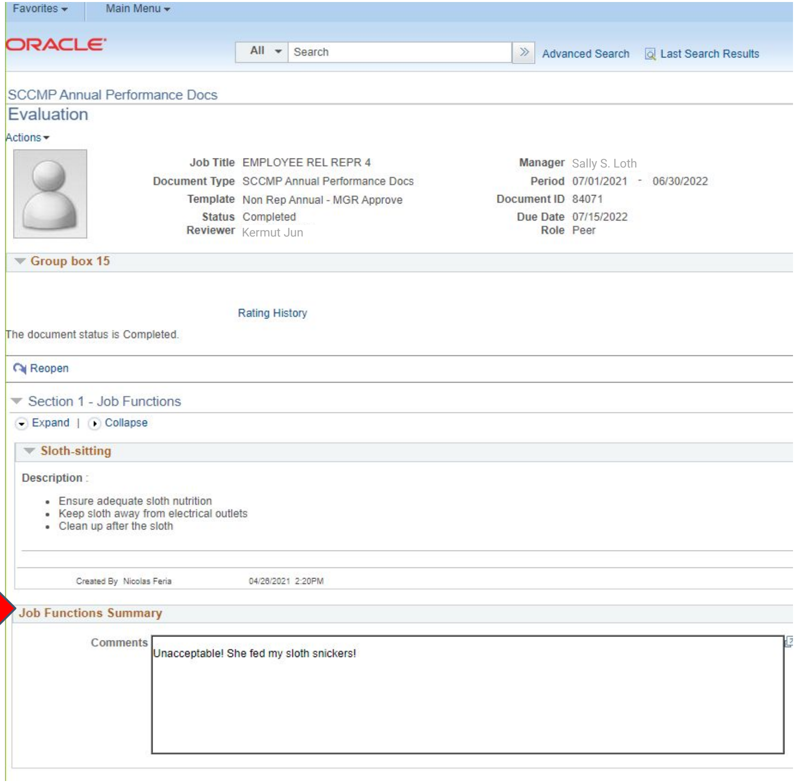


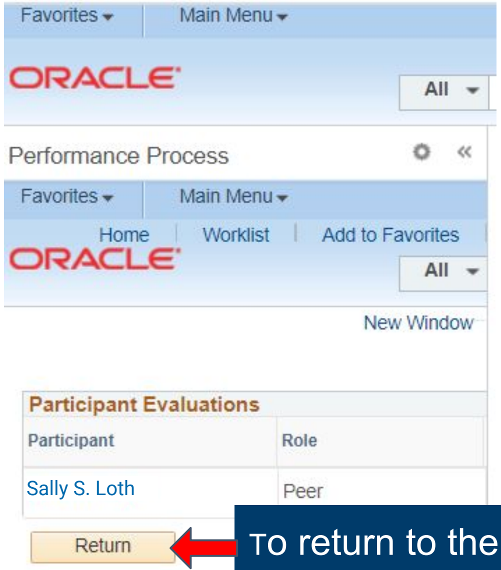

Select desired Participant's name to open their evaluation

# View the Participant Evaluation-Supervisor

The participant evaluation opens in a new tab




Manager 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

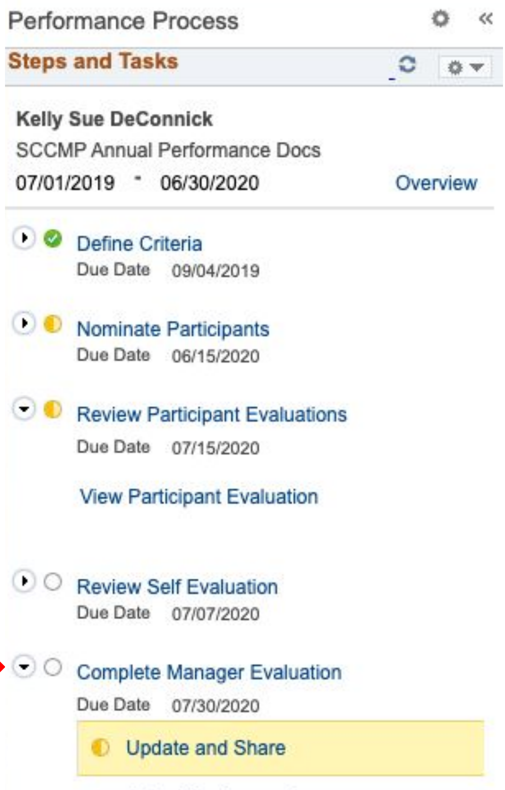
# Module Objectives

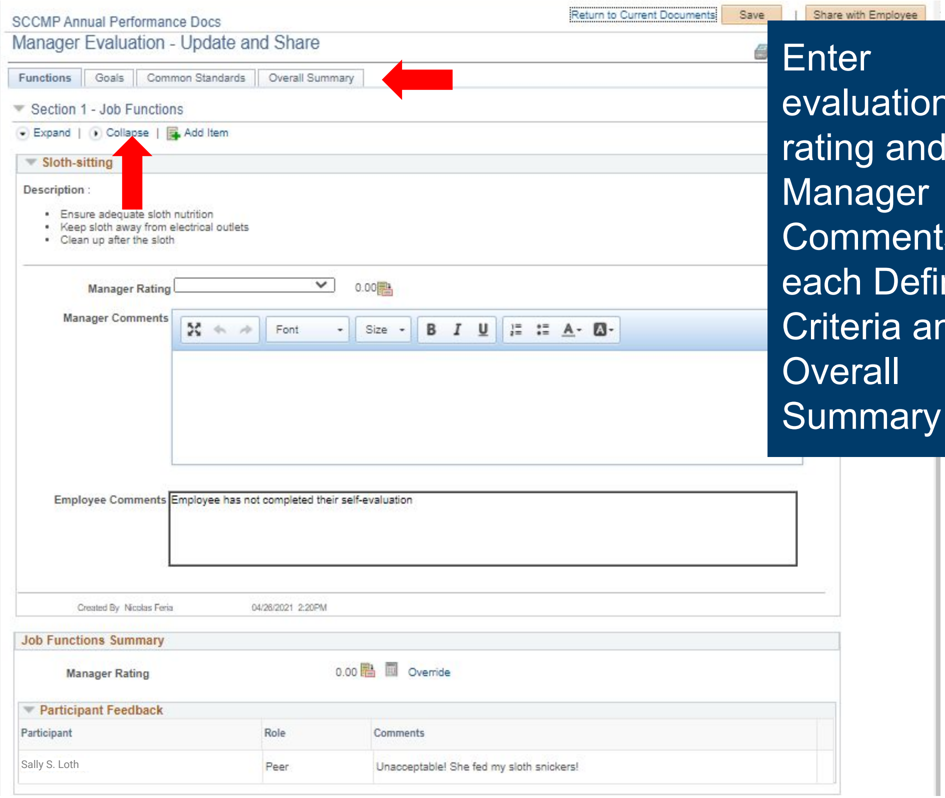


At the end of this module you should be able to do the following:

- Complete the Manager Evaluation

# Complete Manager Evaluation




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

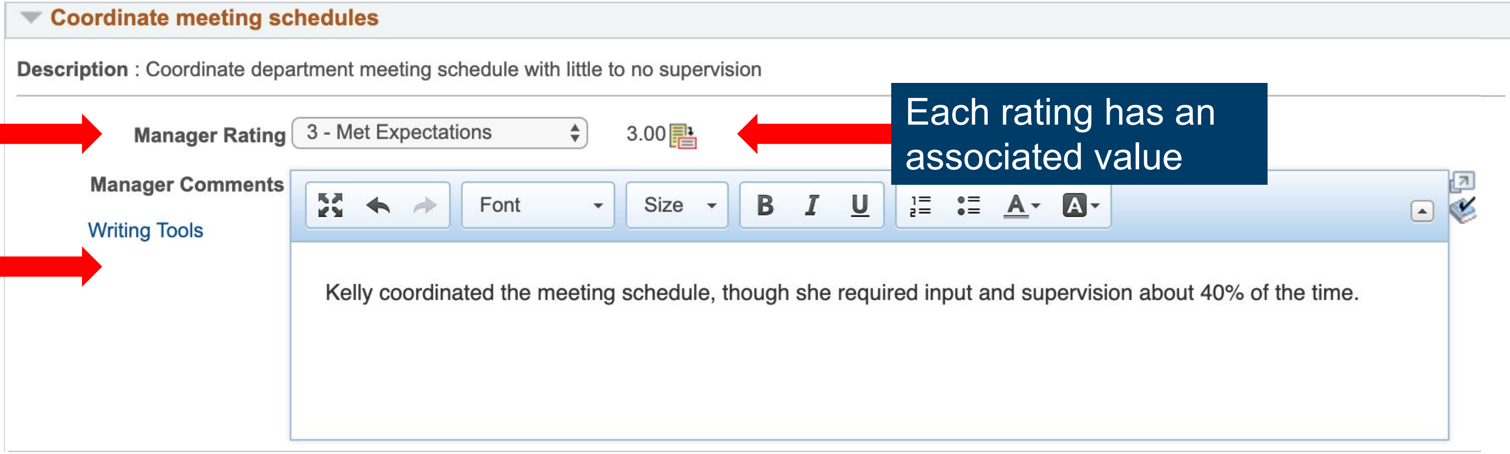
Enter Manager Evaluation

# Complete Manager Evaluation – Ratings and Comments

The **Manager Rating** is required

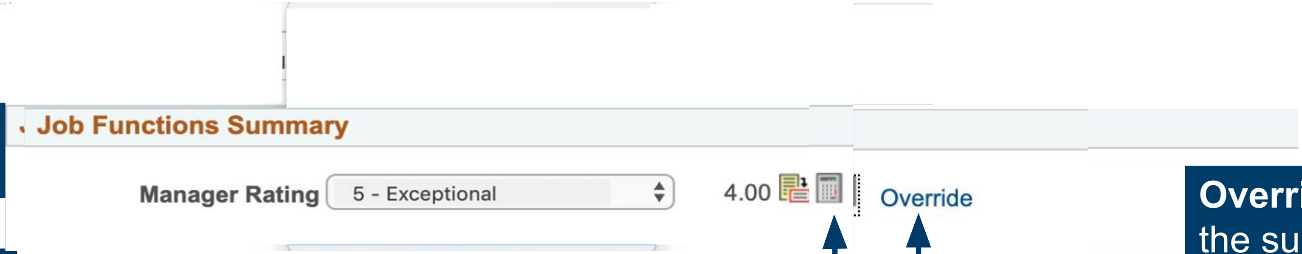
Supervisors can enter comments in the **Manager Comments** box

Each rating has an associated value



# Complete Manager Evaluation – Tab Summary

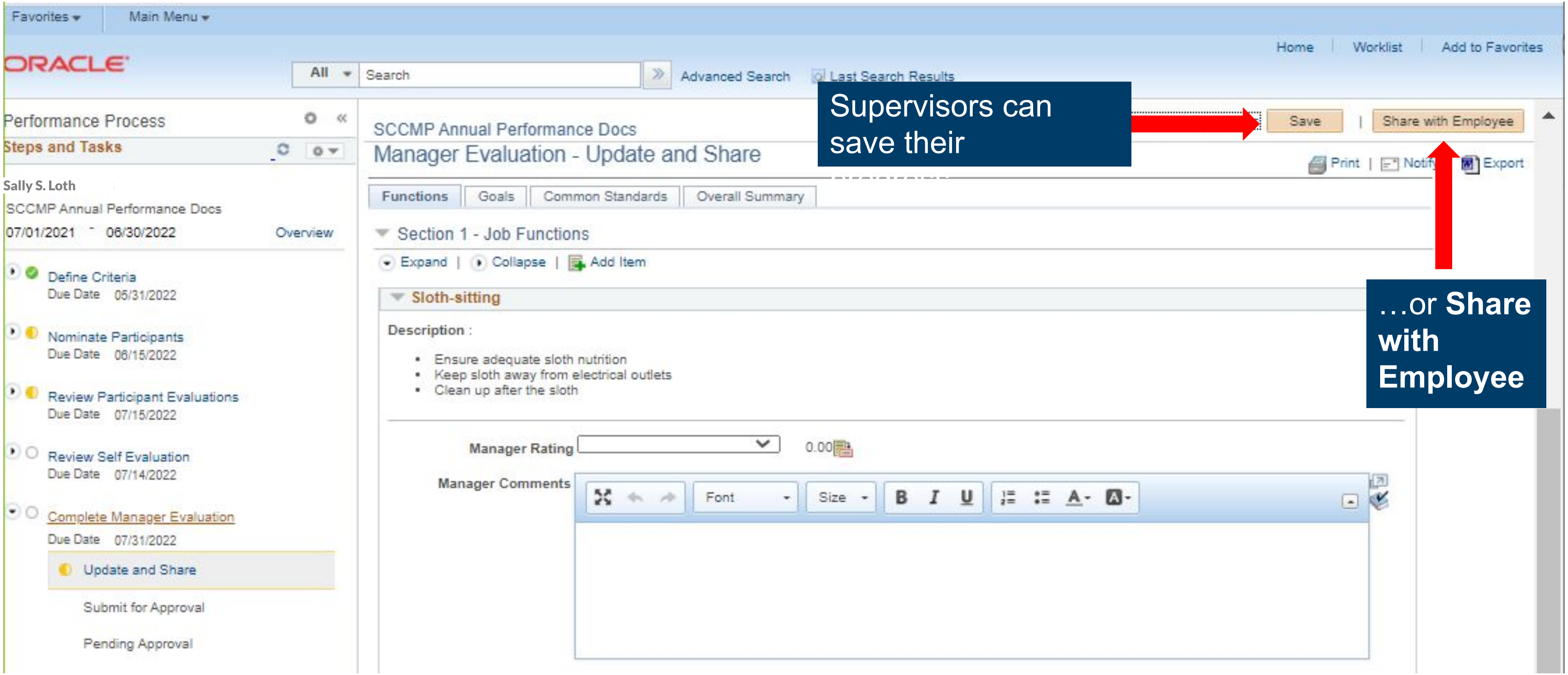
Overall Manager Rating section




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

**Override** allows the supervisor to manually select a summary rating different from the one automatically calculated by the system

# Complete Manager Evaluation

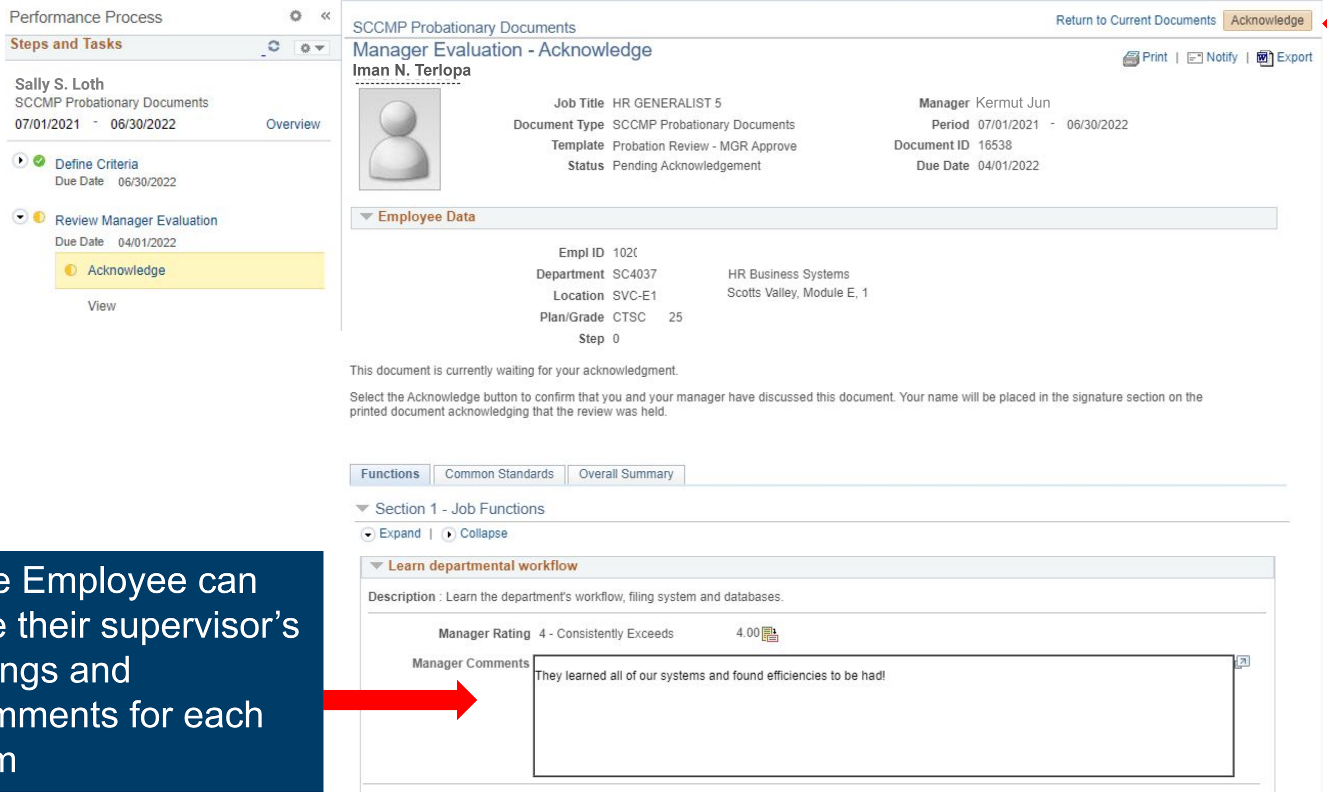


# About Low-Scoring Evaluations

- Supervisor **<u>must</u>** inform ER Analyst if they intend to rate the employee anything less than a Met Expectations.

- UCPath **<u>will not</u>** stop the supervisor from sending a low-scoring evaluation directly to the employee without ER Analyst review.

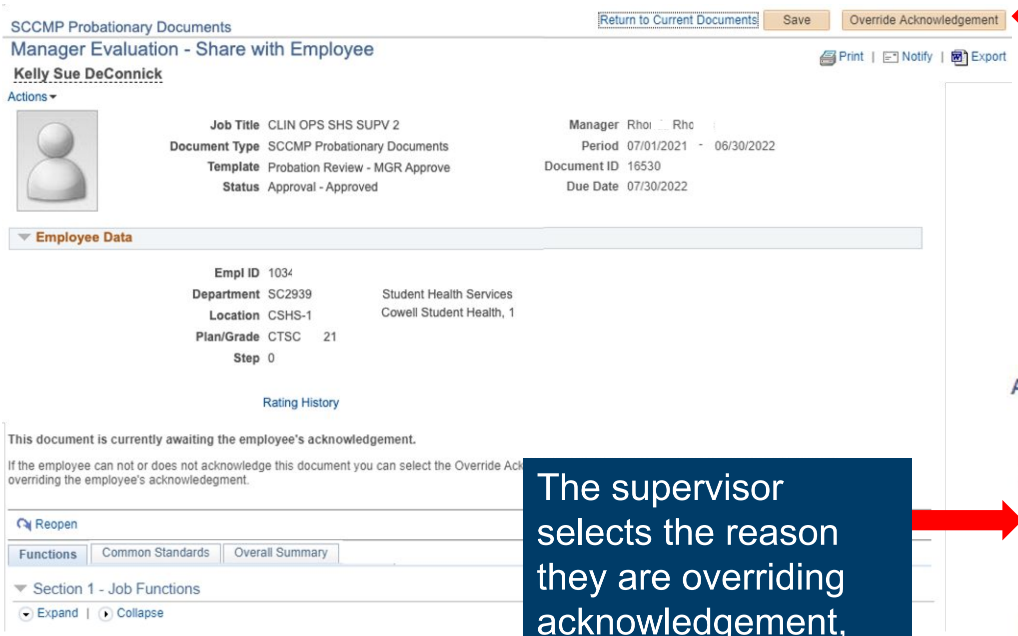
# Employee Acknowledges Evaluation




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

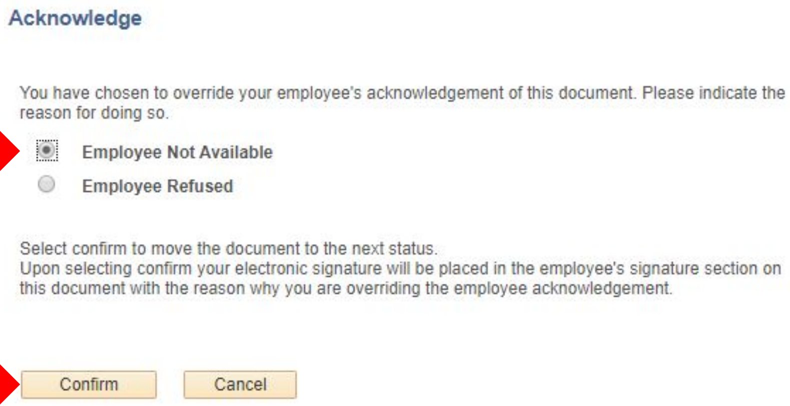
The Employee can see their supervisor's ratings and comments for each item

# Acknowledgement Override



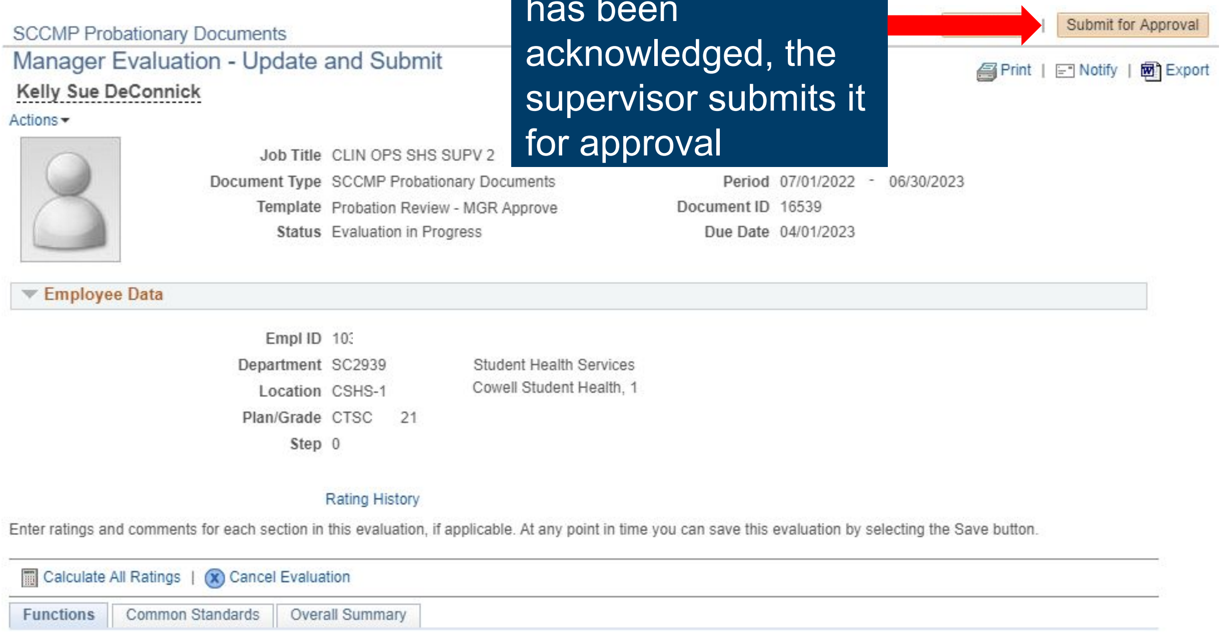

If the employee is unwilling or unable to acknowledge the evaluation, the supervisor can override the acknowledgement

The supervisor selects the reason they are overriding acknowledgement, then confirms



# Submit for Approval

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



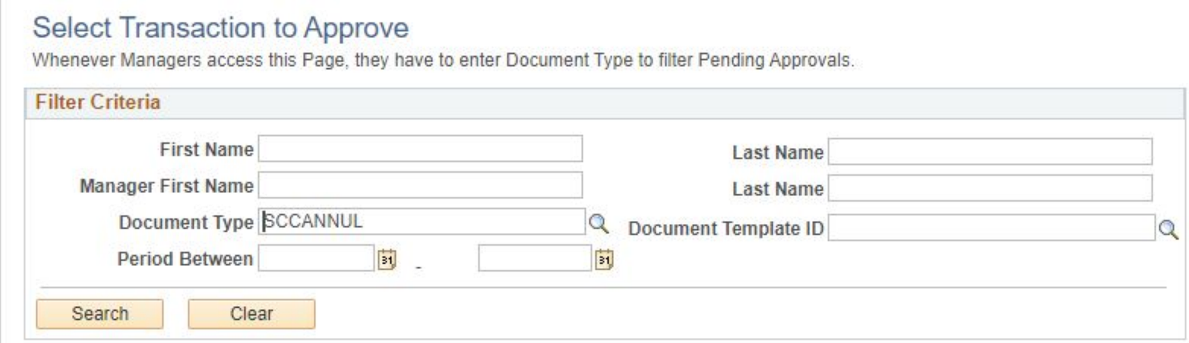
# Document Approval

Depending on the template, the document will be approved in one of two ways:

- **ADM Approve**
  - Evaluation is approved by a divisional ePerformance Administrator
  - Evaluation is found in the Worklist
- **MGR Approve**
  - Evaluation is approved by the supervisor’s supervisor
  - Evaluation is found through Manager Self Service

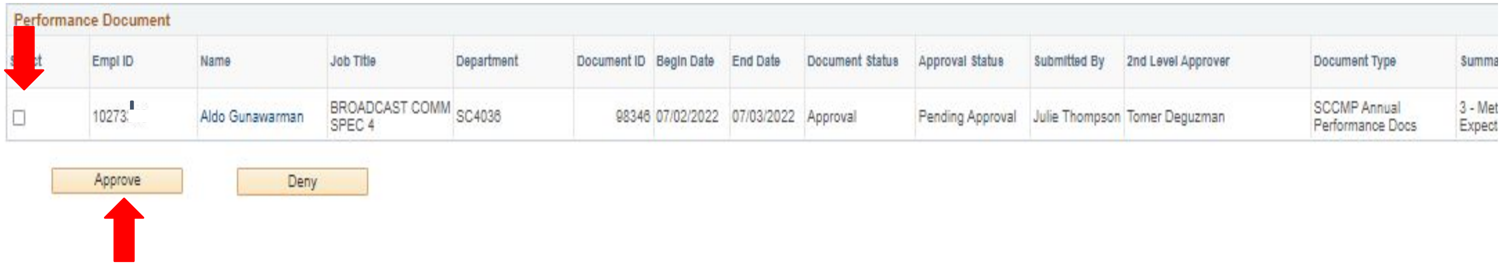
# Approve Documents

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


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

Select desired evaluation(s), then approve or deny



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# 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

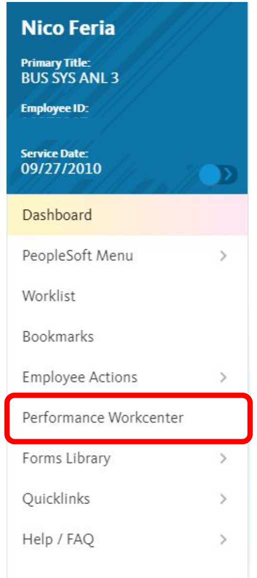


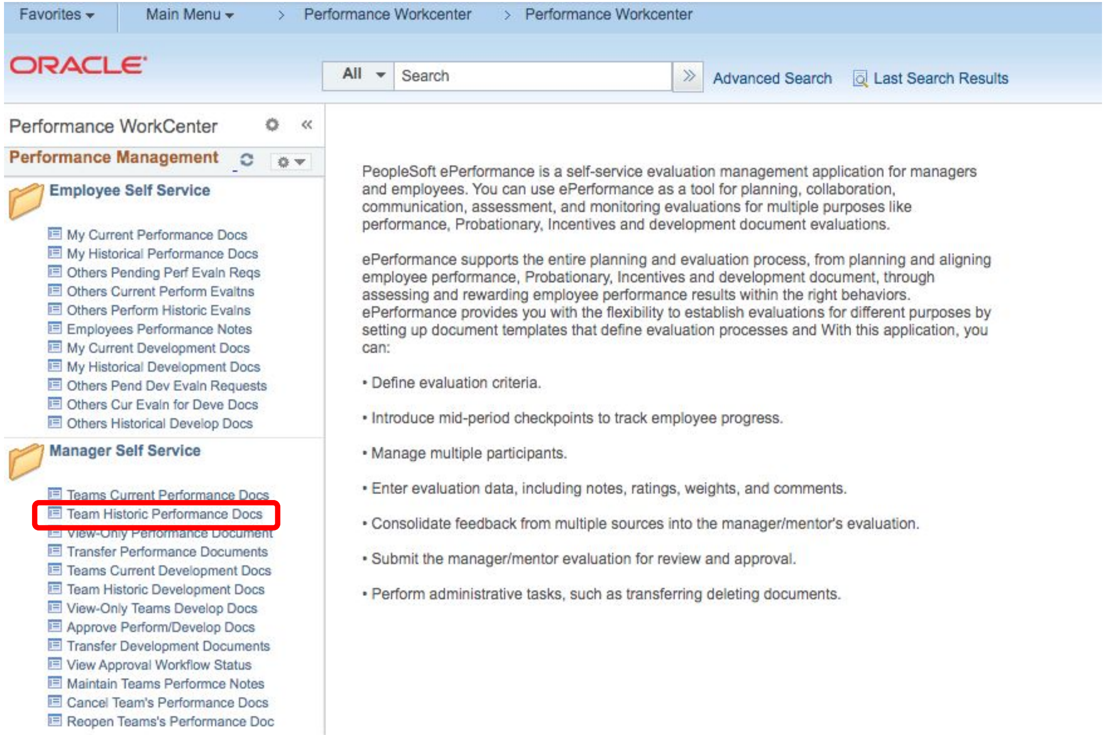
At the end of this module you should be able to do the following:

- View performance evaluations completed in ePerformance

# Historic Performance Documents

Supervisors can access performance evaluations previously completed in ePerformance



# 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!


THANK YOU
For coming to our training!