ePerformance
for Employees
Process Overview
What is ePerformance?

- ePerformance is the performance management module in UCPath

- ePerformance replaces appraisals.ucsc.edu

- ePerformance will be used for the creation and completion of both annual and probationary performance evaluations
Document Types

- **Probationary Performance Evaluations** are used to evaluate a new employee’s performance during the defined probationary period
  - Completed once, unless there is break in service, usually within the first six months of employment

- **Annual Performance Evaluations** are used to rate an employee’s performance against specific performance criteria and goals
  - Completed once a year
Probationary Evaluations

- Probationary period evaluations should be completed for career and partial-year career employees during their probationary period

- Student, contract, limited, per diem, MSP, and SMG employees do not serve a probationary period

- Academic evaluations are not completed using ePerformance
ePerformance Process Flows: Probationary Evaluations

1. 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 Performance Evaluations

• Annual evaluations are required for active career and partial-year career employees

• Annual evaluations are required for contract employees only if specified in the contract

• Academic, student, limited, and per diem employees are not required nor expected to participate in the ePerformance process
**ePerformance Process Flows: Annual Evaluations**

- **Divisional ePerformance Administrator Creates Annual Performance Documents**
- **Supervisor Defines Criteria**
- **Participants are Nominated**
- **Employee Completes Self Evaluation**
- **Supervisor Reviews Self Evaluations and Participant Evaluations**
- **Supervisor Completes Evaluation**
- **Supervisor Shares Evaluation with Employee**
- **Employee Acknowledges Evaluation**
- **Supervisor Submits Evaluation for Approval**
- **Approver Approves Evaluation**
## Differences between Annual and Probationary Evaluations

<table>
<thead>
<tr>
<th>Probationary</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probationary performance evaluation only has a Functions and a Common Standards tab.</td>
<td>Annual performance evaluation has Functions, Goals and Common Standards tabs.</td>
</tr>
<tr>
<td>There is no option to nominate a participant for probationary performance evaluations.</td>
<td>Supervisors &amp; employees can nominate people to participate in the employee's annual performance evaluation.</td>
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<tr>
<td>Employee does not complete a self evaluation for probationary performance evaluations.</td>
<td>Employee completes a self evaluation for annual performance evaluations.</td>
</tr>
<tr>
<td>Probationary evaluation is first approved by the approver and then acknowledged by the employee.</td>
<td>Annual performance evaluation is first acknowledged by the employee and then approved by the approved.</td>
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<tr>
<td>Employee does not have an option to leave comments when acknowledging a probationary performance evaluation.</td>
<td>Employee has the option to leave comments when acknowledging an annual performance evaluation.</td>
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Navigation
Employee Navigation

PeopleSoft ePerformance is a self-service evaluation management application for managers and employees. You can use ePerformance as a tool for planning, collaboration, communication, assessment, and monitoring evaluations for multiple purposes like performance, Probationary, Incentives and development document evaluations.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development document, through assessing and rewarding employees performance results within the right behaviors. ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes 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.
Define Criteria
Define Criteria – Employee Interaction

• During the Define Criteria step, employees are able to add items to the evaluation, and to edit existing items.

• When an employee adds a new item to an evaluation, their name will display at the bottom of that item following the words “Created By”.

• When an employee edits an existing item in an evaluation, their name will display at the bottom of that item 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.

• It is up to the supervisor whether or not they would like their employee to add or edit items to the performance evaluation. When starting a performance evaluation, the supervisor should clearly communicate with their employee their expectations around employee involvement during the Define Criteria step.
Nominating Participants
Participants - Nominating

- Both supervisors and employees can nominate peers to participate in the employee’s annual performance evaluation.

- When an employee nominates a participant, the supervisor has the option to accept or reject the nomination.

- The employee cannot see which nominees participated, nor can they see any participant’s evaluation of them.

- A maximum of five participants are possible.
To nominate a participant, click the Add Peer link.

Enter search criteria for your nominee and click Search.

Select the desired nominee.

Click OK.
Participants - Nominating

The names of nominees are listed here.

You can remove nominees with the trash icon.

When you are done, click Save.
Completing Your Self Evaluation
Employee Self Evaluation

Participants can save their progress...

...or complete the evaluation

Employee can leave comments for each Function or Goal
Reviewing and Acknowledging Your Evaluation
Employee Acknowledges Evaluation

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

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