ePerformance
for Managers and Supervisors
Introductions

Instructor

• Name
• UCPath role
• Functional experience
Training Logistics

Safety & Housekeeping

• Breaks

Classroom Etiquette

• Please silence cell phones
• No email or web surfing
• Return from breaks on time
Questions & Parking Lot

Questions

• If you have a burning question, please stop and ask
• Let the instructors provide the answers

Parking Lot

• Questions we can’t answer right away
• Questions requiring a lengthy response
• Questions beyond the scope of this training
Course Agenda

1: ePerformance Overview
2: Probationary Evaluations
3: Annual Evaluations
Course Objectives

By the end of this course, you should be able to:

• Describe the ePerformance module of UCPath
• Describe how to create and complete performance criteria
• Describe the business process around probationary evaluations
• Describe the business process around annual evaluations
Module Objectives

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

- Describe the ePerformance module of UCPath
- Describe the two document types used in ePerformance
- Explain the business process around probationary performance evaluations
- Explain the business process around annual performance evaluations
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

• ePerformance administrator (in ELR) creates probationary evaluations at the beginning of the probationary period

• 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

- ePerformance Administrator in SHR Creates Probationary Performance Documents
- Supervisor Defines Criteria
- Supervisor Completes Probationary Evaluation
- Supervisor Submits Probationary Evaluation for Approval
- Approver Approves Probationary Evaluation
- Supervisor Shares Evaluation with Employee
- Employee Acknowledges Probationary Evaluation
## What’s New: Probationary Period Evaluations

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probationary evaluation is created by the supervisor.</td>
<td>Probationary evaluation is created by <strong>the ePerformance administrator in ELR</strong>.</td>
</tr>
<tr>
<td>Divisional Administrator manually creates signature hierarchy in the appraisal system.</td>
<td>UCPath automatically creates the signature relationships between supervisor and employee based on position hierarchy.</td>
</tr>
<tr>
<td>Once evaluation is created, daily reminders are sent until completion of evaluation.</td>
<td>System-generated daily reminders will no longer be sent.</td>
</tr>
<tr>
<td>System notifies ER Analysts if an Unsatisfactory or Improvement Needed overall rating has been provided by the supervisor, and ER Analyst must review before the evaluation is sent to the employee for signature.</td>
<td>Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.</td>
</tr>
</tbody>
</table>
Annual Performance Evaluations

- Divisional ePerformance administrators create evaluations for employees within their division at the beginning of the performance cycle – Can be done for a group or individual

- 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

1. Divisional ePerformance Administrator Creates Annual Performance Documents
2. Supervisor Defines Criteria
3. Participants are Nominated
4. Employee Completes Self Evaluation
5. Supervisor Reviews Self Evaluations 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
### What’s New: Annual Performance Evaluations

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual performance evaluation is created by the supervisor toward the end of the performance period.</td>
<td>Annual performance evaluation is created by the ePerformance administrator at the divisional level at the beginning of the performance period.</td>
</tr>
<tr>
<td>Divisional Administrator manually creates signature hierarchy in the appraisal system.</td>
<td>UCPPath automatically creates the signature relationships between supervisor and employee based on position hierarchy.</td>
</tr>
<tr>
<td>Once evaluation is created, daily reminders are sent until completion of evaluation.</td>
<td>System-generated daily reminders will no longer be sent.</td>
</tr>
<tr>
<td>Goals for the upcoming performance cycle are entered toward the end of the current performance cycle.</td>
<td>Goals for the current performance cycle are entered at the beginning of the current performance cycle.</td>
</tr>
<tr>
<td>Participant nomination functionality does not exist in current appraisal system.</td>
<td>Supervisors &amp; employees can nominate people to participate in the employee’s performance evaluation.</td>
</tr>
<tr>
<td>System notifies ER Analysts if an Unsatisfactory or Improvement Needed overall rating has been provided by the supervisor, and ER Analyst must review before the evaluation is sent to the employee for signature.</td>
<td>Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.</td>
</tr>
</tbody>
</table>
# Differences between Annual and Probationary Evaluations

<table>
<thead>
<tr>
<th>Probationary</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ePerformance administrator in Staff Human Resources</strong> creates probationary performance documents.</td>
<td><strong>Divisional ePerformance administrator</strong> creates annual performance documents for their division.</td>
</tr>
<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>
</tr>
<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 approver.</td>
</tr>
<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>
</tr>
</tbody>
</table>
About Low-Scoring Evaluations

- **Supervisors** must inform ER Analyst if they intend to give an overall rating of 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.
Module 1 Quiz

• You now have the opportunity to assess your knowledge of the information presented in this module

• The questions and answers presented in this review help you to determine whether you remember and understand the important points
Multiple Choice

Who creates probationary evaluations?

A. The supervisor
B. The divisional ePerformance Administrator
C. The ePerformance Administrator in SHR
D. None of the above

The ePerformance Administrator in SHR will create probationary evaluations and the divisional ePerformance Administrator will create annual evaluations.
FALSE. UCPath sends one email to notify supervisors and employees that a performance evaluation has been created.
In an annual performance evaluation, goals for the upcoming performance cycle are entered toward the end of the current performance cycle.

False. Goals for the upcoming performance cycle are entered at the beginning of that performance cycle.
Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.

If a supervisor intends to rate an employee’s overall performance as anything less than a Met Expectations, what action must they take?

A. Delete the evaluation
B. Notify their supervisor
C. Notify their Employee Relations Analyst
D. Send a formal apology to the employee

Supervisors must inform ER Analyst if they intend to give an overall rating of anything less than a Met Expectations. UCPath will not stop the supervisor from sending a low-scoring evaluation directly to the employee without ER review.
PROBATIONARY EVALUATIONS
MODULE 2
Module Objectives

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

- Describe how to create and complete performance criteria
- Describe how to view, add, and edit Performance Notes
- Describe how to complete a probationary performance evaluation
Probationary Evaluation – Supervisor Navigation

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

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development document, through assessing and rewarding employee performance results within the right behaviors.

ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes and with this application, you can:

1. Define evaluation criteria.
2. Introduce mid-period checkpoints to track employee progress.
3. Manage multiple participants.
4. Enter evaluation data, including notes, ratings, weights, and comments.
5. Consolidate feedback from multiple sources into the manager/mentor’s evaluation.
6. Submit the manager/mentor evaluation for review and approval.
7. Perform administrative tasks, such as transferring deleting documents.
Supervisors can search and filter evaluation results from their employees' current evaluations.
Define Criteria

The Performance Process bar on the left shows supervisors where they are in the evaluation process.

Supervisors can click Add Item to add to the Functions tab.

At the top, supervisors can see details about the document.
Define Criteria – Add Your Own Item

There are three ways to add criteria to a performance evaluation:

- **Add your own item** allows supervisors to write custom criteria.

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

2. **Titles** are required for **Add your own items**:
   - Supervisors can add more details in the description section.
Define Criteria – Copy Item from My Documents

There are three ways to add criteria to a performance evaluation:

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

Copy item from my Documents allows supervisors to add an item from their current performance evaluation to their employee’s performance evaluation.

Supervisors can select one or more criteria from their performance evaluation to copy to their employee’s performance evaluation.
Define Criteria – Copy Item from My Team’s Documents

There are three ways to add criteria to a performance evaluation:

1. Add your own item
2. Copy item from my Documents
3. Copy item from My Team’s Documents

Copy item from My Team’s Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee’s performance evaluation.

Supervisors can search for a specific performance evaluation among their employees’ evaluations.

Select an evaluation.
Define Criteria – Copy Item from My Team’s Documents

There are three ways to add criteria to a performance evaluation:

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

Copy item from My Team’s Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee’s performance evaluation.

Supervisors can select one or more criteria from their employee’s performance evaluation to copy them to the current employee’s performance evaluation.
Define Criteria

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

There are three buttons available to supervisors in each item:

- Copy to Other Documents
- Edit
- Delete
Define Criteria – Copy to Other Documents

Copy to Other Documents allows the supervisor to copy the selected item to another performance evaluation.

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

Message

Your item, Coordinate meeting schedules, will be saved before continuing. (4601,388)

Select Ok to continue, or Cancel to return to the document without copying.
Copy to Other Documents allows the supervisor to copy the selected item to another performance evaluation.

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 -- Coordinate meeting schedules 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.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Job Title</td>
<td>Period Begin</td>
<td>Period End</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Karen Schloss</td>
<td>HR GENERALIST 5</td>
<td>03/01/2020</td>
<td>08/30/2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 allows the supervisor to copy the selected item to another performance evaluation.

You have chosen to add the Item -- Budget management to the performance documents listed. To confirm this assignment, select the Save button.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Period Begin</th>
<th>Period End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Schloss</td>
<td>HR GENERALIST 5</td>
<td>03/01/2020</td>
<td>08/30/2020</td>
</tr>
</tbody>
</table>

Supervisors confirm the action by clicking Save.
Supervisors can edit an existing item

Supervisors can make changes to both the title and the description of existing items.

- Supervisors confirm their edits with the **Update** button.
Define Criteria – Delete

Supervisors can delete an existing item

Supervisors are prompted to confirm the deletion

SCCMP Probationary Documents

Delete Confirmation

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

Yes - Delete  No - Do Not Delete
Define Criteria – 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.
Define Criteria

Supervisors can save their progress...

...or approve the completed criteria
Reopen Previous Step

When a step or task in the Performance Process bar is completed, the icon next to that step or task will turn into a green checkmark.

- Supervisors can reopen the previously completed step through the Performance Process bar.
- Only the last completed step can be reopened.

Refresh window
Performance Notes

• Performance Notes allows supervisors to document an employee’s performance throughout the performance period.

• As performance evaluations are created at the beginning of the performance period, supervisors can use Performance Notes throughout the performance period to document their employee’s performance and progress.

• Supervisors can then use these notes as reference when completing a performance evaluation.
Performance Notes

- Employees can also keep performance notes about themselves

- Performance notes are only visible to the author of the note

- Once the relevant performance evaluations is completed, supervisors should delete the associated performance notes
Performance Notes - Navigation

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

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development document, through assessing and rewarding employee performance results within the right behaviors. ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes and With this application, you can:

- Define evaluation criteria.
- Introduce mid-period checkpoints to track employee progress.
- Manage multiple participants.
- Enter evaluation data, including notes, ratings, weights, and comments.
- Consolidate feedback from multiple sources into the manager/mentor’s evaluation.
- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.
Supervisors can search for existing performance notes by employee ID and date range, or they can add a new note.
Define Criteria – 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
In the **Complete Manager Evaluation** step, the supervisor will have the opportunity to rate and comment on the employee’s performance for each of the previously defined criteria.

The two evaluation fields for each item are:
- **Manager Rating**
- **Manager Comments**

Two new tabs:
- **Common Standards**
- **Overall Summary**
The Manager Rating is required

Each rating has an associated value

Supervisors can enter comments in the Manager Comments box

Kelly coordinated the meeting schedule, though she required input and supervision about 40% of the time.
At the bottom of each tab is a **Summary** 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.

A summary section is shown with a job functions summary table where the manager rating is set to 5 - Exceptional with an overall rating of 4.00. The override function is highlighted in the diagram.
Supervisors can save their progress… or Submit 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
Document Approval

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

- **MGR Approve**
  - Evaluation is approved by the supervisor’s supervisor
  - Evaluation is found through Manager Self Service > **Approve Perform/Develop Docs**
  - When searching for evaluations to approve, they must specify the Document Type as **SCCANNUL**
Once the evaluation is approved, the supervisor can share it with the employee.
Probationary Evaluation – Employee Navigation

1. Click on "Employee Self Service" under the Performance Workcenter section.

Employee Acknowledges Evaluation

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

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

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

The supervisor selects the reason they are overriding the acknowledgement.
Module 2 Quiz

• You now have the opportunity to assess your knowledge of the information presented in this module

• The questions and answers presented in this review help you to determine whether you remember and understand the important points
Multiple Choice

If a supervisor wants to copy one or more criteria from another employee’s evaluation to the current evaluation, which option would they choose after clicking “Add Item”?

A. Add your own item
B. Copy Item from my Documents
C. Copy Item from My Team’s Documents
D. None of the above

Copy item from My Team’s Documents allows supervisors to copy items from other performance evaluations among their employees to the current employee’s performance evaluation.
Multiple Choice

Who can view performance notes entered by a supervisor?

A. The supervisor who wrote them
B. The employee who the note is about
C. The supervisor of the supervisor who wrote them
D. All of the above
True or False

A supervisor has no option to override employee acknowledgment if an employee is unavailable to acknowledge the evaluation.

FALSE. The supervisor can use the Override Acknowledgment function.
Module Objectives

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

- Describe how employees and supervisors can nominate participants
- Describe how employees complete their self evaluation

1: ePerformance Overview
2: Probationary Evaluations
3: Annual Evaluations
ePerformance Process Flows: Annual Evaluations

1. **Divisional Administrator** creates annual performance documents.
2. **Supervisor** defines criteria.
3. Participants are nominated.
4. **Employee** completes self-evaluation.
5. **Supervisor** reviews self-evaluations and participant evaluations.
6. **Supervisor** completes evaluation.
7. **Supervisor** shares evaluation with the employee.
8. Employee acknowledges evaluation.
9. **Supervisor** submits evaluation for approval.
10. **Approver** approves evaluation.

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.
Annual Evaluation – Supervisor Navigation

Performance WorkCenter

- My Current Performance Docs
- My Historical Performance Docs
- Others Pending Perf Eval Reqs
- Others Perform Historic Evals
- Others Perform Historic Notes
- My My Current Development Docs
- My Historical Development Docs
- Others Perform Development Docs
- Others Perform Dev Eval Requests
- Others My Current Dev Docs
- Others Submit Doc for Dev Docs

Manager Self Service

- Teams Current Performance Docs
- Teams Historic Performance Docs
- Team View-Only Performance Docs
- Team Transfer Performance Documents
- Team Current Development Docs
- Team Historic Development Docs
- Team View-Only Development Docs
- Team Approve/Develop Docs
- Team Transfer Development Documents
- Team View Approval Workflow Status
- Team Maintain Team Performance Notes
- Team Cancel Team’s Performance Docs
- Team Reopen Team’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 selecting 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.
Annual Evaluation – 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 documents evaluations.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance, Probationary, Incentives and development documents, 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. 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.
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.

- The Police templates do not allow the nomination of participants.
Participants - Nominating

To nominate a participant, click the Add Peer link.

Enter search criteria for your nominee and click Search.

Select the desired nominee.

Click OK.

More Information
Participants - Nominating

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

Supervisors can save their progress…

The supervisor can remove nominees with the trash icon

…or Submit Nominations

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

Supervisors can track the status of each nomination.

The available number of participants decreases.

Nominations can be cancelled.
Participants – Navigation

- Nominated participants receive an email inviting them to participate in the evaluation with a link to the evaluation.

- Nominated participants can also navigate to their pending evaluation requests through the Performance Workcenter.
Participants – Accept or Decline

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

- Participants can complete the evaluation by going to **Others Current Perform Evaltns**

![Diagram showing navigation steps]

Participants can select an evaluation by employee name
Participants - Evaluation

Participants only see an employee’s Functions tab.

Participants are only able to give summary comments.

Participants can save their progress…

…or complete the evaluation.
Employee Self Evaluation - Navigation

Performance WorkCenter

- Employee Self Service
  - My Current Performance Docs
  - My Historical Performance Docs
  - Others Pending Perf Eval Req
  - Others Current Perf Eval
  - Others Perform Historic Evals
  - Employees Performance Notes
  - My Current Development Docs
  - My Historical Development Docs
  - Others Pendl Dev Eval Requests
  - Others Cur Eval for Dev蒋 Docs
  - Others Historical Develop Docs

Manager Self Service

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.
# Employee Self Evaluation

## Current Performance Documents

**Karen Schloss**

Listed are your current performance documents.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Document Type</th>
<th>Status</th>
<th>Business Unit</th>
<th>Period Begin</th>
<th>Period End</th>
<th>Job Title</th>
<th>Next Due Date</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>10200383 SCCMP Probationary Documents</td>
<td>Define Criteria</td>
<td>SCCMP</td>
<td>03/01/2020</td>
<td>08/30/2020</td>
<td></td>
<td>HR GENERALIST 5</td>
<td>08/30/2020</td>
<td>Nicolas Fera</td>
</tr>
<tr>
<td>SCCMP Annual Performance Docs</td>
<td>Evaluation in Progress</td>
<td>SCCMP</td>
<td>06/30/2019</td>
<td>07/01/2020</td>
<td></td>
<td>HR GENERALIST 5</td>
<td>07/08/2020</td>
<td>Nicolas Fera</td>
</tr>
</tbody>
</table>

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

Participants can save their progress... or complete the evaluation.

Employee can leave comments for each Function or Goal.
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.

Goal 1: Printer and copier troubleshooting
Description: Successfully provide support and complete 60 printer and copier help tickets per month

Manager Rating: 5 - Exceptional
Manager Comments: Kelly would often complete 80 tickets per month.

Employee Comments: Employee has not completed their self-evaluation

Goal 2: Replace department filing system
Annual Evaluation – Historic Performance Documents

Supervisors can access performance evaluations previously completed in ePerformance.
Annual Evaluation – Historic Performance Documents

- Performance evaluations from the old appraisal system are not being converted into ePerformance.

- For performance evaluations completed in appraisals.ucsc.edu, supervisors should search their email for the emailed PDF, sent by the old appraisal system.

- If a supervisor needs a copy of a performance evaluation for which they were not the supervisor, and that predates ePerformance (e.g., due to a Reports To change), they can reach out to their ER Analyst.
Module 3 Quiz

• You now have the opportunity to assess your knowledge of the information presented in this module

• The questions and answers presented in this review help you to determine whether you remember and understand the important points
True or False

Only supervisors are able to nominate colleagues to participate in an employee’s annual evaluation.

FALSE. Both supervisors and employees can nominate participants.
Fill-In-The-Blank

Evaluations are set up to be approved by either managers or divisional ePerformance administrators.
Putting It All Together

• The ePerformance module in UCPath will be used to create and complete annual and probationary performance evaluations.

• Probationary period evaluations are completed for career and partial-year career employees during their probationary period.

• Annual performance evaluations are required for active career and partial-year career employees.
  – Some contract employees also require annual performance evaluations.

• Probationary performance evaluations will be created by an ePerformance administrator in ELR.

• Annual performance evaluations will be created by divisional ePerformance administrators.
Putting It All Together (cont.)

- Performance evaluations can be set up to be approved by
  - The supervisor’s supervisor, through Manager Self Service, or
  - A divisional ePerformance administrator, through the worklist

- Annual performance evaluations allow both the supervisor and the employee to nominate participants
Parking Lot

• Review parking lot
  – Have all questions been answered during our class?
  – Are there any new questions to add to the list?
Where to Get Help

• The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks

  – From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers

  – From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component