

**UNIVERSITY
OF
CALIFORNIA**

Using ePerformance for STEP

Reference Guide

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Glossary

Checkpoint – The quarterly check-in between Employee and Manager. The majority of time is spent discussing the “Feedback” section.

Competencies – Abilities and behaviors the employee demonstrates in their day-to-day work.

Discussion Questions – These are the 4 questions in the “Feedback” tab that will be the focus of the quarterly check-in conversations.

Document – The annual performance appraisal form.

Define Criteria – Defining your goals and selecting your 2-3 focus competencies. Employee starts this process and Manager approves it.

ePerformance – The name of the new system UCOP is using for performance management.

Finalize Criteria – This is the exact same process as a normal checkpoint, except it is the final checkpoint before the annual evaluation. This is the last chance the employee has to make changes to their document.

Manager Evaluation – The yearend appraisal, at which point the manager selects an overall performance rating.

Nominee – Multi-rater

Nominate Participants – Process of selecting multi-raters and sending out invitations. Also referred to as “multi-rater feedback”.

Participant Evaluations – Formerly known as “multi-rater feedback.”

Proficiencies – Overall rating options (Outstanding, Exceeds Expectations, Solid Performance, Needs Development/New and Learning, Needs Attention).

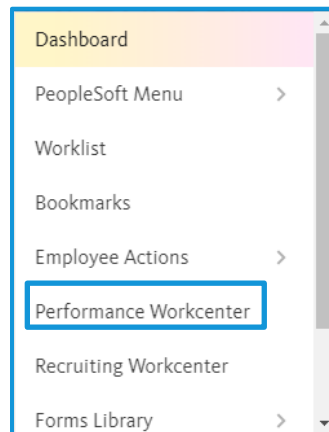
Second-level approver – The individual approving the Manager Evaluation and rating choice prior to the Manager and Employee meeting to review the yearend appraisal.

SMART Goals – Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound.

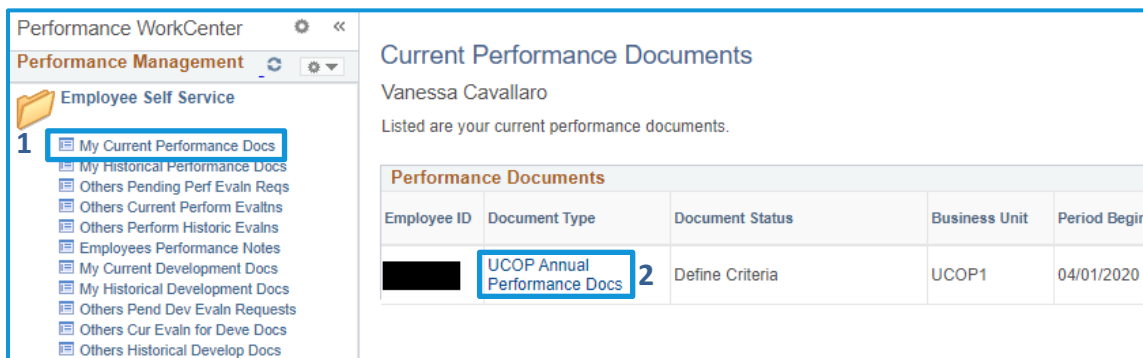
Define Criteria (Set Goals)

Employee Goes First

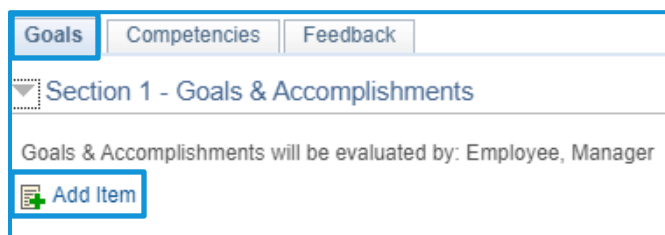
1. Log into UCPATH and select **Performance Workcenter** in the left menu.



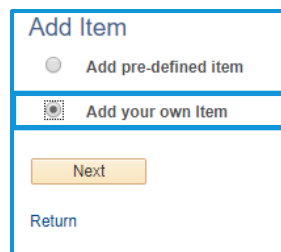
2. Click **My Current Performance Docs (1)**. Click on the **document name** you wish to view (2).



3. Click on **Add Item** in the **Goals** tab.



4. Choose **Add your own item** to add your goals.
TIP: Use **SMART** language!



5. Write your goal title and description. We recommend three to five goals.
6. Change the **Status** of your goal.

TIP: Save often! Consider writing your goals in MS Word and copy/paste them in.

Add Your Own Item

*Title Learning and Development System Ownership

Description

By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on time and effective logistics for all classes/rooms/materials

Status

Complete
In Progress
Not Applicable

Add

Return

7. Navigate to **Competencies** tab and select **Add Competency**.

Goals Competencies Feedback

▼ Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager

Add Competency

8. Select **Add pre-defined competency**. Click **Next**.

Note: For Competencies, always select "Add pre-defined competency".

Add Competency

Select an option to add the new competency.

☒ Add pre-defined competency

☐ Add your own competency

Next

9. Leave all fields blank and click **Search** to view the full list of Competencies.

Add a Pre-Defined Competency

To search for Competencies to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria

Competency

Content Group Type

Content Group

Search

Clear

10. Choose 2-3 competencies to add to your evaluation. Click **Add**.

Search Results

Personalize

1-10 of 10

Competencies	
<input type="checkbox"/>	Belonging & Community: Demonstrates respect for all people
<input type="checkbox"/>	Communication: Clearly and effectively shares information
<input type="checkbox"/>	Change Agility: Anticipates and adapts to change
<input type="checkbox"/>	Collaboration: Builds partnerships to achieve results
<input type="checkbox"/>	Continuous Improvement: Strives for high-quality performance
<input type="checkbox"/>	Continuous Learning: Works to learn and increase knowledge
<input type="checkbox"/>	Mission & Vision Focus: Committed to the UC mission & vision
<input type="checkbox"/>	Problem Solving: Anticipates and conducts analysis
<input type="checkbox"/>	Service Focus: Delivers professional and responsive service
<input type="checkbox"/>	Stewardship: Demonstrates accountability and judgment

Select All

Deselect All

Add

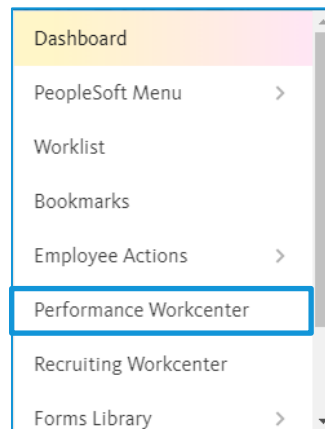
11. Click **Save**. The system will not notify your manager when you complete, so you must notify your Manager that you have completed the Define Criteria step via email, phone, etc.

Return to Current Documents

Save

Manager Reviews and Edits

1. Log into UCPATH and select **Performance Workcenter** in the left menu.



2. Click **Teams Current Performance Docs**. Click on the document name you wish to view. (For example, we'll view Vanessa Cavallaro's performance document.)

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 Evalns
- 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

- 1 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

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 Job Code Department Set ID UCOP1 Department

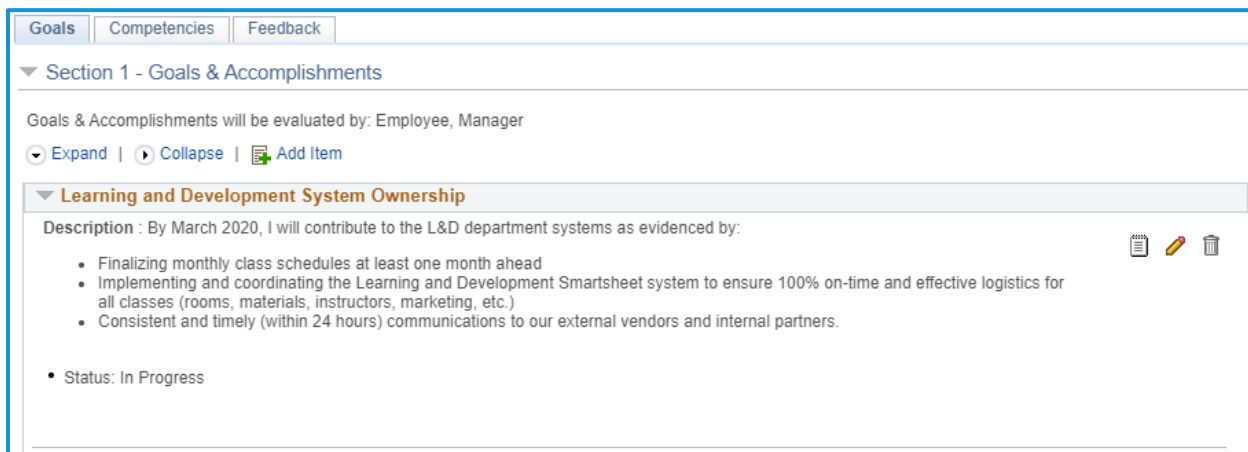
Filter Clear

Performance Documents

Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin
	Vanessa Cavallaro	UCOP Annual Performance Docs	Define Criteria	UCOP1	04/01/2020

3. Review **Goals** and **Competencies tab**. Edit as needed using the button (). When finished, click **Save**.


Note: The employee gets an email notification when you complete the checkpoint.



Goals Competencies Feedback

▼ Section 1 - Goals & Accomplishments

Goals & Accomplishments will be evaluated by: Employee, Manager

▼ Expand | ► Collapse |  Add Item


▼ **Learning and Development System Ownership**

Description : By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)
- Consistent and timely (within 24 hours) communications to our external vendors and internal partners.

• Status: In Progress


Sit down together!

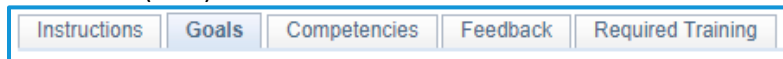
1. Manager and employee sit down together to review the goals. Edit goals as needed using the edit button (). When goals are finalized, Manager clicks **Approve**.

[Return to Current Documents](#) Save | Approve

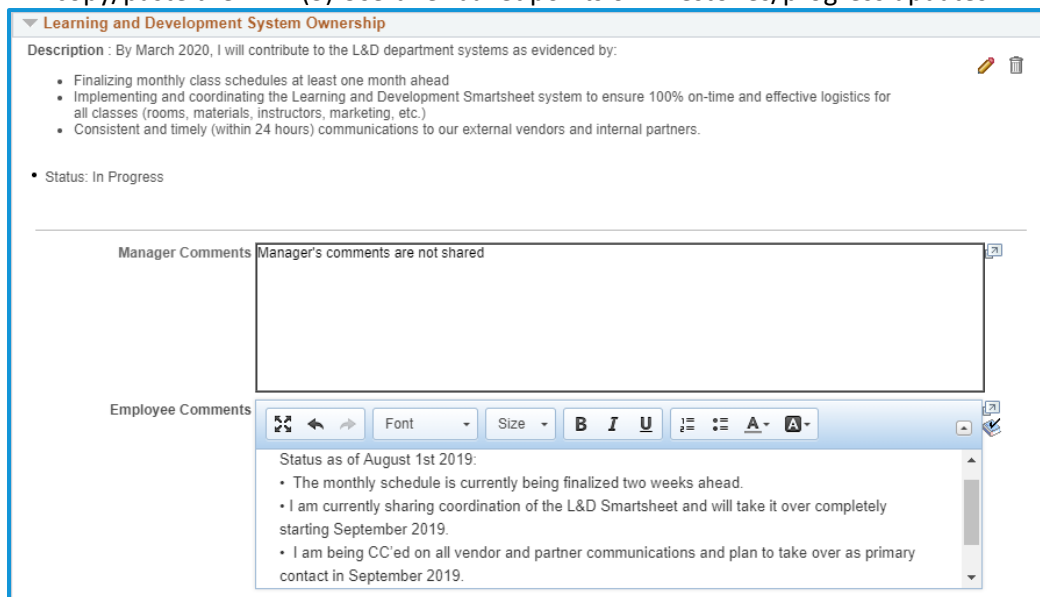
Checkpoints (Check-Ins)

Employee Goes First

1. Add comments on **Goals tab**. If needed, edit your goals or update the goal status using the edit button ().



Best Practices: (1) **Date your comments**, (2) **Save often!** Or write your goals in MS Word and copy/paste them in. (3) Use brief bullet points of milestones/progress updates



▼ Learning and Development System Ownership

Description : By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)
- Consistent and timely (within 24 hours) communications to our external vendors and internal partners.

• Status: In Progress

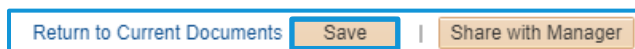
Manager Comments: Manager's comments are not shared

Employee Comments:

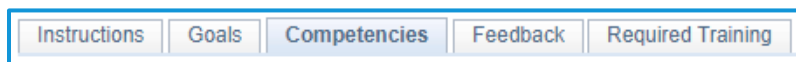
Status as of August 1st 2019:

- The monthly schedule is currently being finalized two weeks ahead.
- I am currently sharing coordination of the L&D Smartsheet and will take it over completely starting September 2019.
- I am being CC'ed on all vendor and partner communications and plan to take over as primary contact in September 2019.

Save the document.



2. Add comments in **Competencies tab**. Remember to date your comments.



▼ Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager

▼ Expand | ▼ Collapse | + Add Competency

▼ Competency 1: Collaboration

Description : Interacts with others in a way that demonstrates collaboration and cooperation. Builds partnerships with others to achieve organizational results. Cultivates, builds and maintains positive relationships across the organization.

Manager Comments Manager's comments are not shared

Employee Comments

Update August 1, 2019

I am continuing to meet with the HR Business Partners to learn more about their needs. I consistently check in with team members on how to best support them in their role. I ask for help when needed.

Save the document.

[Return to Current Documents](#) [Save](#) | [Share with Manager](#)

3. Add comments in **Feedback tab**. Remember to date your comments.

[Instructions](#) [Goals](#) [Competencies](#) [Feedback](#) [Required Training](#)

▼ Section 3 - Discussion Questions

Discussion Questions will be evaluated by: Employee, Manager

▼ Expand | ▼ Collapse

▼ Fulfilling Accomplishments

Description : What accomplishment(s) felt the most fulfilling and what additional accomplishments have you achieved in this quarter?

Manager Comments Manager's comments are not shared

Employee Comments

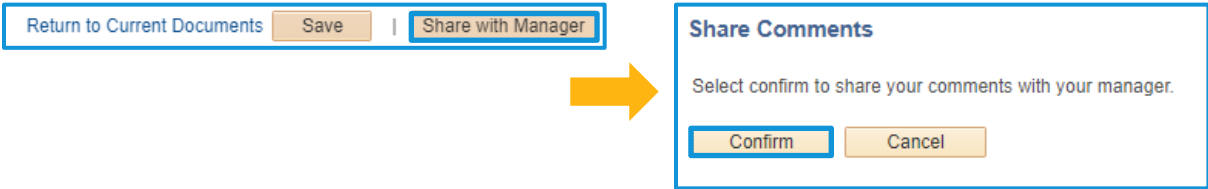
Update August 1st, 2019

I am building relationships with my colleagues and am now a resource for some of their questions. I have developed a familiarity with the Smartsheet process and feel more comfortable coordinating the process.

Save the document.

[Return to Current Documents](#) [Save](#) | [Share with Manager](#)

4. When finished, click **Share with Manager** in the menu bar.



Manager Reviews and Comments

1. Following the same login instructions from [Define Criteria](#): Log into UC Path and select **Performance Workcenter** and then **Teams Current Performance Docs**. Select the employee document you are reviewing.
2. Review Employee comments on the **Goals tab**. Add your own comment above the Employee's. Remember to **date your comments!**

Learning and Development System Ownership

Description : By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)
- Consistent and timely (within 24 hours) communications to our external vendors and internal partners.

• Status: In Progress

Manager Comments

8/2/19 – Great. Let's talk about where you need support.

Employee Comments

Status as of August 1st 2019:

- The monthly schedule is currently being finalized 2 weeks ahead
- I am sharing coordination of the L&D Smartsheet and will take it over starting Sept. 2019
- I am being CCed on all vendor and partner communications, and plan to take over as primary contact in September 2019

Save the document.

[Return to Current Documents](#) **Save**

3. Review the Employee's comments on the **Competencies tab**. Add your own comment above the Employee's. Remember to **date your comments!**

▼ **Competency 1: Collaboration**

Description : Interacts with others in a way that demonstrates collaboration and cooperation. Builds partnerships with others to achieve organizational results. Cultivates, builds and maintains positive relationships across the organization.

Manager Comments

8/2/19 – I am consistently getting positive feedback from other departments about how much they enjoy working with you!

Employee Comments

Update August 1, 2019

I am continuing to meet with the HR Business Partners to learn more about their needs. I consistently check in with team members on how to best support them in their role. I ask for help when needed.

Save the document.

[Return to Current Documents](#) [Save](#)

4. Review the Employee's comments for each question on the **Feedback tab**. Add your own comment above the Employee's. Remember to **date your comments**!

▼ **Manager Accountability**

Description : What else can I do to help you be successful? Start, stop, keep doing?

Manager Comments

Great idea! Let's talk about which ones interest you the most.

Employee Comments

I appreciate our weekly meetings and your coaching approach. I would like to start accompanying you to meetings with department leaders to observe how you consult with our internal partners.

Created By: Template 01/30/2020 3:42PM

Save the document.

[Return to Current Documents](#) [Save](#)

5. When you have finished adding your comments, **Save** the document. Then click **Share with Employee**.

[Return to Current Documents](#) [Save](#) [Skip Checkpoint](#) | [Share with Employee](#)



Share Comments
Select confirm to share your comments with the employee.
[Confirm](#) [Cancel](#)

6. The Employee receives an email notification and can review all of the manager's comments prior to meeting together.

Sit down together!

7. After Manager and Employee sit down together for your check-in, the Manager clicks **Complete Checkpoint** in the menu bar.

[Return to Current Documents](#) [Save](#) [Skip Checkpoint](#) [Stop Sharing](#) | [Complete Checkpoint](#)



Complete Checkpoint
Select confirm to indicate a review was held with the employee and this checkpoint is complete.
[Confirm](#) [Cancel](#)

Note: Checkpoints 2 and 3 follow the exact same process as Checkpoint 1.


8. Optional: You may need to skip a Checkpoint. You can do so by clicking **Skip Checkpoint** in the menu bar.

[Return to Current Documents](#) [Save](#) [Skip Checkpoint](#) | [Share with Employee](#)

Finalize Criteria (Final Checkpoint)

Finalize Criteria operates as another checkpoint. However, once the Manager completes this step, the Employee can no longer edit their document.

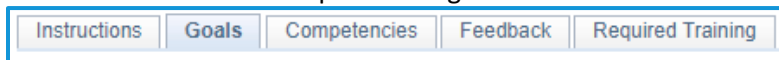
Employee Goes First


1. Navigate to **Finalize Criteria** in the left-hand navigation menu. Add your final comments on **Goals tab**. If needed, edit your goals using the edit button ().

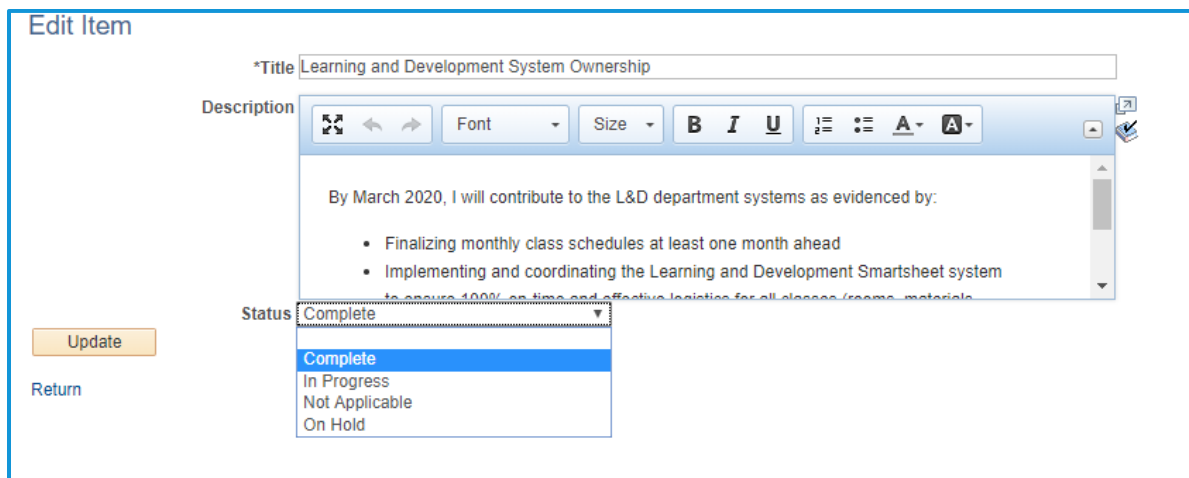
Note: This is the last time the employee is able to add their comments before the final yearend appraisal and overall rating.

Best Practices: (1) **Date your comments**, (2) Use brief bullet points of milestones/progress updates, (3) **Save often!** Or write your goals in MS Word and copy/paste them in.

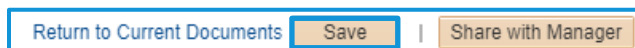
2. Add final comments and updates for goals on the **Goals tab**.



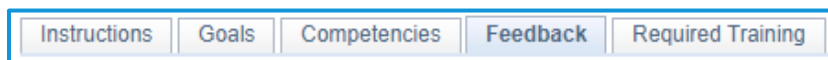
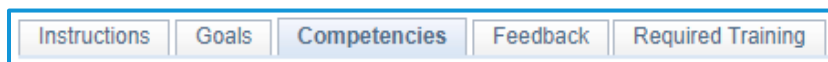
Employee can update the status of their goal using the edit button ().



Save the document.



3. Add final comments in **Competencies and Feedback tabs**. Remember to date your comments.



Save the document.



4. Add the dates of completion for the compliance trainings in the comment boxes in the **Required Training** tab.

Instructions Goals Competencies Feedback **Required Training**

▼ Section 5 - Required Training

Required Training will be evaluated by: Employee, Manager

Expand Collapse

- UC Cyber Security Awareness Fundamentals
- UC Sexual Violence and Harassment for Supervisors and above
- UC Sexual Violence and Sexual Harassment for Staff
- UC Managing Implicit Bias Series for Supervisors and Above
- Other Required or Recommended Training

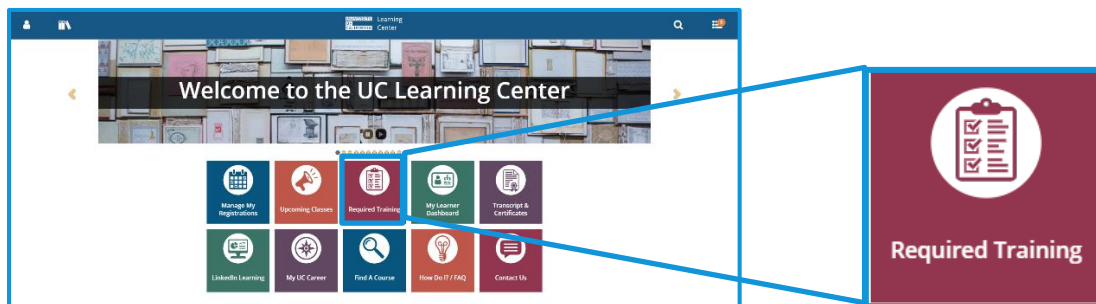
▼ UC Cyber Security Awareness Fundamentals

Description: Please indicate the date completed in the comments field. This course provides information on threats facing the University and what each of us can do to mitigate them. The course will take approximately 40 minutes to complete.

Manager Comments

Employee Comments
Completed 2/25/2020

Tip: To check the status and completion date of your required training, log into the UC Learning Center at ucop.edu/ucoplearningcenter/ using your Single Sign-On.



5. Once you add your final comments and update your goal status, click **Share with Manager** in the menu bar. On the next screen, **Confirm** share.

Return to Current Documents Save | **Share with Manager**

Share Comments

Select confirm to share your comments with your manager.

Confirm Cancel

Manager Reviews

1. Navigate to the performance document and review the Employee's updated status and comments on **Goals**, **Competencies**, **Feedback**, and **Required Training**.
2. Comment on the Employee's progress on **Goals**, **Competencies**, **Feedback**, and **Required Training**. Be sure your comments support an overall rating for the performance cycle.
3. **Save** the document after your entry on each tab.
4. Select **Share with Employee** when you are ready to share.

A rectangular button with a light orange background and a thin blue border, containing the text "Share with Employee" in a dark blue font.

Sit Down Together!

1. Meet with your Employee for your final checkpoint meeting of this performance cycle. Add any final comments after the meeting, if needed.
2. **Save** the document.
3. When all edits have been made, select the **Complete** button in the upper-right-hand menu. Select **Confirm**.

Note: Clicking **Complete** moves the document into the formal "Manager Evaluation" stage. At this point, all of the goals and comments are locked in, and the employee can no longer make edits. The manager can now progress to the Manager Evaluation stage, where they select the overall rating.

A rectangular button with a light blue background and a thin blue border, containing the text "Return to Current Documents" in a dark blue font.A rectangular button with a light orange background and a thin blue border, containing the text "Save" in a dark blue font.A rectangular button with a light orange background and a thin blue border, containing the text "Stop Sharing" in a dark blue font.A rectangular button with a light orange background and a thin blue border, containing the text "Complete" in a dark blue font.

Finalize Criteria

Select confirm to complete the Finalize Criteria Step.

A rectangular button with a light orange background and a thin blue border, containing the text "Confirm" in a dark blue font.A rectangular button with a light orange background and a thin blue border, containing the text "Cancel" in a dark blue font.

4. Select **Return to Current Documents** to repeat the process for other direct reports.

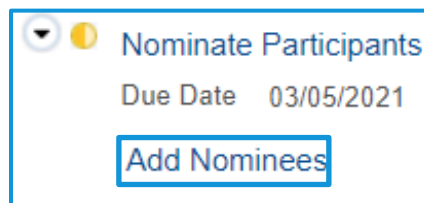
Nominate Participants (Optional Multi-Rater)

Participants Evaluators (formerly known as “multi-raters”) can be selected by both manager and employee. The manager has final approval on the selected participants and generates the invitation to complete the feedback questions. The feedback provided by the nominated participants is anonymous to the employee and it is up to the manager to determine how the feedback is shared in the yearend appraisal.

Employee and Managers Nominate Participants

1. Employee and Manager meet to discuss and agree on who they will nominate as multi-raters for the Employee.


2. To add a multi-rater or “Nominee”, Employee clicks **Nominate Participants** on the left-hand task bar and selects **Add Nominee**.



3. Select **Add Participant** and use the directory to select a UC employee as participant.

Nominate Participants - Add Nominees

Vanessa Cavallaro



Job Title	EMPLOYMENT REPR 3	Manager	Gary Cheng
Document Type	UCOP Annual Performance Docs	Period	04/01/2020 - 03/31/2021
Template	UCOP Main Performance Appraisa	Document ID	16516
Status	In Progress	Due Date	03/05/2021

◆ Participant Role: Participant Minimum Required: 0 Maximum Available:6

Nominations

Currently there are no nominees in your nomination list.

[+ Add Participant](#)

Nominate Participants

Instructions

Search Criteria

Last Name

Business Unit

First Name

Search

Once you select the intended participant, click **OK**.

Person Search

Nominate Participants

Instructions

Search Criteria

Last Name

Business Unit

First Name

Search

Search Results

☒

Miranda Josafat

i

OK

Select **Save**. The Manager will receive a notification.

Return to Current Documents

Save

✔ You have successfully saved your nominations.

◆ Participant Role: Participant

Minimum Required: 0 Maximum Available: 5

Nominations

Nominee	Action
Miranda Josafat	

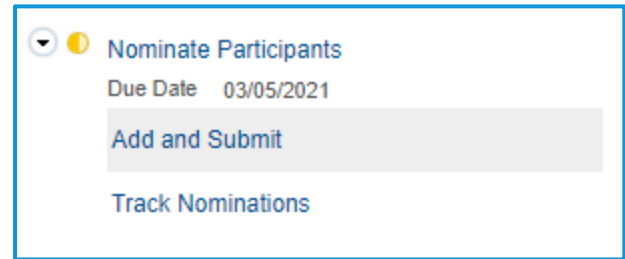
+


Add Participant

The Employee can nominate up to **five** participants for the Participant Evaluations.

Manager Approves Nominated Participants

1. Manager logs in and selects the employee document they are reviewing. Navigate to the left-hand task bar to Nominate Participants. To add nominees, select **Add and Submit**. To track pending requests, select **Track Nominations**.





2. Manager can search and add nominees for Participant Evaluations using the same process as the Employee. Manager is able to remove any nominations using the **Delete** icon ().

It is recommended that Manager communicates any nominees they are adding to or removing from the list.

✓ You have selected nominations for addition. The nominations will be added when the transaction is saved.

◆ Participant Role: Participant Minimum Required: 0 Maximum Available:6

Nominations	
Nominee	Action
Miranda Josafat	
Merideth Wakeman	

+ Add Participant

3. Once all Participant Evaluation nominees are listed, select **Save** and then **Submit Nominations**. Select **Confirm** to send nomination requests to the participants.

Return to Current Documents |



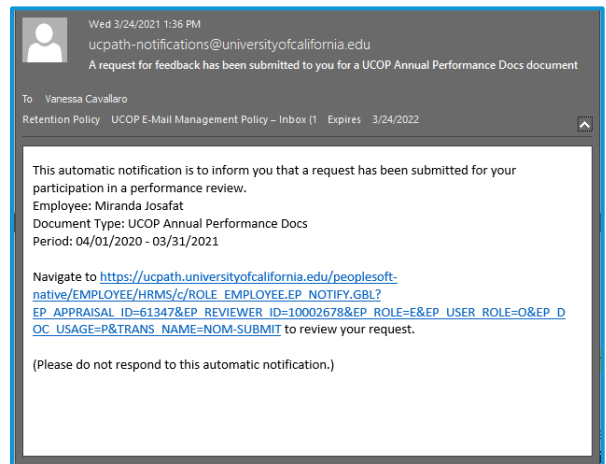
Submit Nominations

Select confirm to submit nomination requests to the listed nominee's.

Please note: Managers cannot submit the multi-rater nominations until the Finalize Criteria stage is complete in the ePerformance system.

Nominated Participants Complete Evaluations

1. The nominated Participant will receive one system-generated email notification requesting their participation in the review process.
2. To access the multi-rater, click the link in the email.



3. The link will take you to the UC Path login page. Once you login, you will be taken to your **Others Pending Performance Evaluations** page to **Accept** or **Decline** the nomination.

Pending Evaluation Requests

Pending Evaluation Requests		
Name	Document Type	Due Date
<input type="checkbox"/> Miranda Josafat	UCOP Annual Performance Docs	06/15/2021

Select All Deselect All

Accept Decline

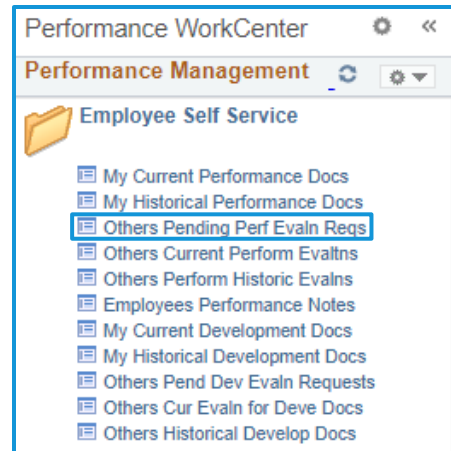
4. If you accept, you will be taken to your **Others Current Performance Evaluations** page. Click on the name of the employee to view and complete the multi-rater form.

My Current Evaluations for Others

✓ You have successfully accepted the selected evaluations.

Current Evaluations for Others				
Name	Document Type	Status	Period Begin	Period End
Miranda Josafat	UCOP Annual Performance Docs	Not Started	04/01/2020	03/31/2021

- To access the multi-rater without the notification email, log into UC Path and select Performance Work Center. Navigate to the left-hand menu and select **Others Pending Perf Evaluation Requests**.



- You can accept or decline nominations from this window.

Pending Evaluation Requests

Pending Evaluation Requests			
	Name	Document Type	Due Date
<input checked="" type="checkbox"/>	Vanessa Cavallaro	UCOP Annual Performance Docs	04/24/2021
<input type="checkbox"/>	Alfred Garrett	UCOP Annual Performance Docs	04/24/2021

Select All Deselect All

Accept Decline

- If declining, enter a comment and submit.

Accept Decline



Decline Evaluation Requests

⚠ Are you sure you want to decline these evaluation requests?

Pending Evaluation Requests		
Name	Document Type	Due Date
Alfred Garrett	UCOP Annual Performance Docs	04/24/2021

Enter Comments:

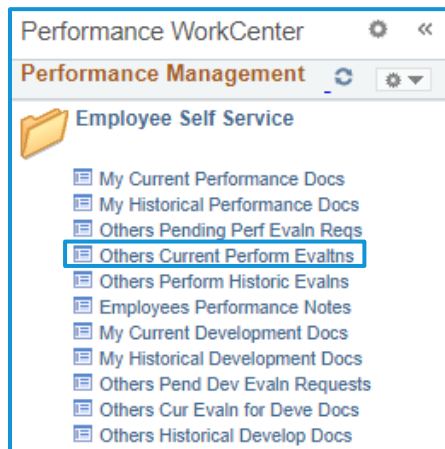
I don't feel like i have worked with this individual enough to provide pertinent feedback

Yes No

8. If accepting, **Accept** the nomination.



9. To fill out the evaluation, navigate back to the main ePerformance menu and select **Others Current Performance Evaluations**.



10. Respond to the four discussion questions. Remember to **Save** your progress!
You can leave and return to the form after saving by clicking **Return to Current Documents**, and then selecting the Employee name when you are ready to return to the form.

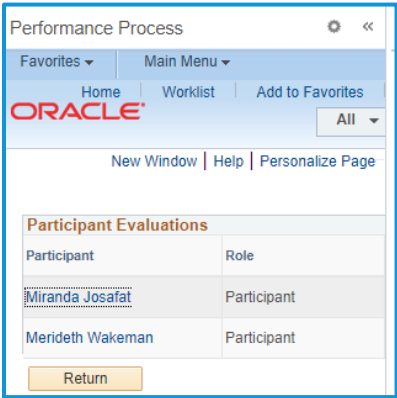
A screenshot of the 'Nominee Opportunities' form. The 'Description' field contains the text: 'What are some opportunities for this individual to increase their effectiveness?'. The 'Comments' field is active, showing a rich text editor with a toolbar. The text in the comments field is: 'Vanessa has gone above and beyond our expectations for one person. i believe that if she adds 1 or 2 more staff to her team, then she would be able to focus more on fine tuning the training sessions instead getting slowed down by having to manage all the minor details and issues with the course material.'

11. To complete and submit, select **Complete** in the upper-right menu, then select **Confirm**.

A screenshot of the 'Complete Evaluation' dialog box. It contains the text: 'If you have no further changes to make to this document select confirm to complete this evaluation.' Below the text are two buttons: 'Confirm' and 'Cancel'. The 'Confirm' button is highlighted with a blue border.

Manager Reviews Participant Evaluations (Optional Multi-Rater)

- 1. Navigate to the left-hand menu to **Review Participant Evaluations**. Select the Participant Evaluation you want to view.



- 2. Review the feedback from the Participant Evaluations. You can incorporate the feedback into the Manager Evaluation.

Note: The Manager should paraphrase or aggregate the feedback data rather than directly quoting or cutting and pasting the responses.

UCOP Annual Performance Docs

Evaluation

The document status is Completed.

Long Format | Reopen

Section 1 - Nominations

Expand | Collapse

Nominee Feedback

Description : You have been identified as someone who has had regular interactions with this employee. Please describe the nature of your interactions and provide feedback on the quality and effectiveness of your work together, highlighting any specific areas of performance that stand out.

Comments

Vanessa is great to work with, she always responds in a timely manner and is professional and detail oriented

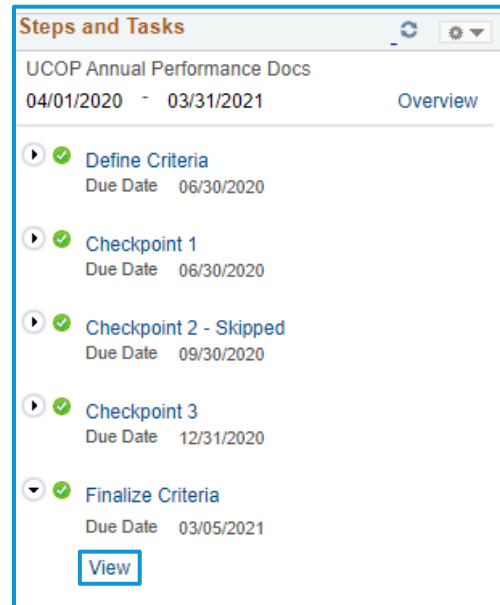
Created By: Template 01/30/2020 3:42PM

End of Year Process (Yearend Appraisal)

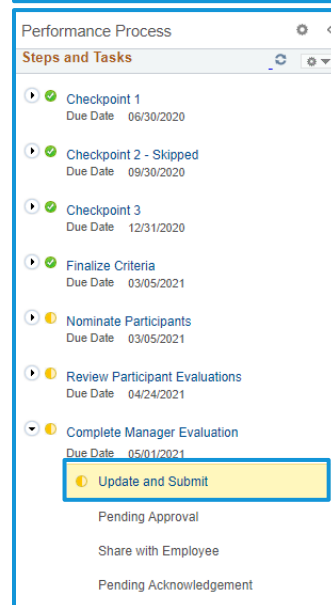
Manager Evaluation

1. Navigate into the performance document.

Tip: To review the Employee comments that have been documented over all of the checkpoints, Navigate to “Finalize Criteria” on the left side of the task bar and click on “View” which will provide a view of the cascading comments for Goals, Competencies, and Feedback questions, as well as Required Training completion dates.



2. When ready to complete, navigate to **Complete Manager Evaluation** in the left-hand menu and select **Update and Submit**.




Adding Overall Comments

- If you want to add supporting comments for your overall rating, please note there is **no overall comment box** for the Manager. The manager can add any general overall comments to support their rating or comments from the multi-rater feedback in any one of the **Goals** comment boxes. Remember to date your comments.

Choosing an Overall Rating

- To submit overall rating, navigate to **Goals** tab and scroll down to **Goals and Accomplishments Summary**, where you will see the **Manager Rating**. Select the overall rating from the drop-down menu of proficiencies.

- Click the **Ratings Descriptions** button to the right of the drop-down () for detailed descriptions of each rating to ensure accuracy. You can select the rating from this screen as well and then click **Select Proficiency**.

Proficiencies	
Rating	Description
<input type="radio"/> Outstanding	<ul style="list-style-type: none"> Consistently role models and exhibits mastery of core job knowledge and functions, responsibilities, and continually proposes enhancement recommendations in current job and new work opportunities. Consistently produces exceptionally high quality work exceeding expectations on all goals within control, in planned timelines. Consistently seeks value-added opportunities for new responsibilities and challenges. Demonstrates superior interpersonal skills, is respected by others, and is sought after to participate in or lead projects and work groups
<input type="radio"/> Exceeds Expectations	<ul style="list-style-type: none"> Very high level of contribution Consistently performed above and beyond all defined expectations
<input type="radio"/> Solid Performance	<ul style="list-style-type: none"> Consistently demonstrates core job knowledge, skills, and abilities to effectively perform job functions. May occasionally exceed expected performance Consistently achieves all goals within control, in planned timelines Shares ideas, information, skills, and knowledge; listens and is responsive to manager and others; maintains a positive attitude
<input type="radio"/> Need Development/New & Learning	<ul style="list-style-type: none"> Performance expectations partially met Moderate level of contribution Some critical goals completed Achievement below expectations Improvement needed in the position New in position, developing appropriately; Performance was good given time in the position
<input type="radio"/> Needs Attention	<ul style="list-style-type: none"> Does not consistently demonstrate core job knowledge and competencies required to perform job functions effectively Fails to consistently achieve expected goals, within control, in planned timelines. Does not consistently demonstrate interest in or ability to collaborate and share information with others to deliver results Additional training or commitment is required



Select Proficiency

- Once you select the rating, click the **Submit for Approval** button in the upper-right-hand menu.

The screen will display the overall rating you selected for the Employee. Select **Confirm** to move forward, or **Cancel** to return to the document and edit.

Submit for Approval

Select confirm to submit this document for approval.

Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

The overall rating you have assigned to this employee is **Solid Performance**.

Confirm

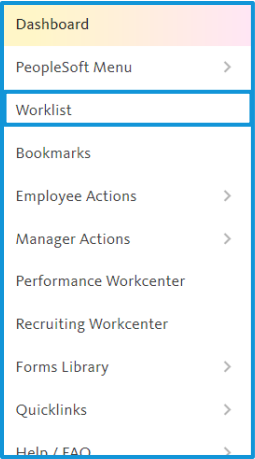
Cancel

7. The left-hand menu will now be at the **Pending Approval** step under **Complete Manager Evaluation**.
8. Once the manager assigns and submits the rating to the next level manager, the next level manager will work with UCOP HR to engage in the department/division ratings review process **before** approving the document.

2nd Level Approvals

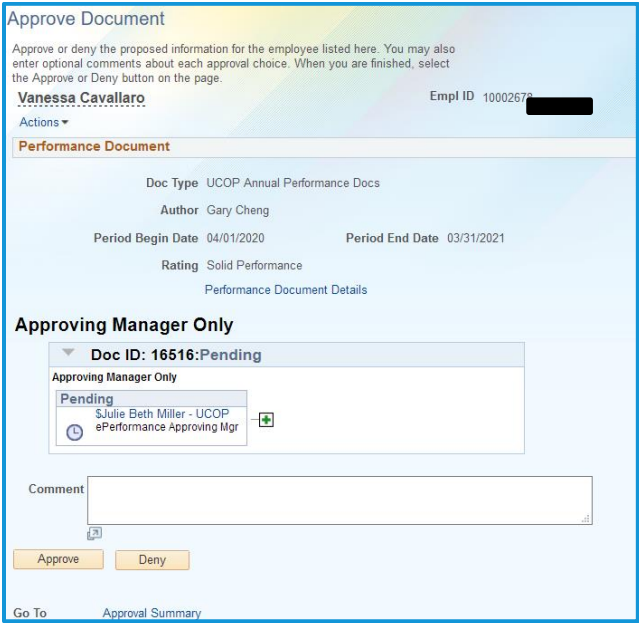
Once the manager assigns and submits the rating to the next level manager, the next level manager will work with UCOP HR to engage in the department/division ratings review process **before** approving the document.

- 1. After the review process is over, the Second-level Approver logs into UC Path and selects **Worklist** in the left-hand navigation menu.

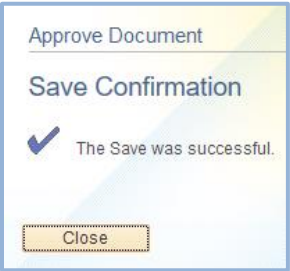


- 2. Select the appropriate performance document to review. You can **Approve** or **Deny** from the main worklist screen.

If you are denying the document, leave a **comment** for the Manager on your reasoning for the denial.



- 3. Save the status.



Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Vanessa Cavallaro Empl ID [REDACTED]

Actions ▾

Performance Document

Doc Type UCOP Annual Performance Docs
 Author Gary Cheng
 Period Begin Date 04/01/2020 Period End Date 03/31/2021
 Rating Solid Performance
[Performance Document Details](#)

Approving Manager Only

Doc ID: 16516: **Approved**

Approving Manager Only

Approved
 ✓ Julie Beth Miller - UCOP
 ePerformance Approving Mgr
 02/07/20 - 11:50 AM

- A second-level approver can also access performance documents through the **Manager Self-Service Menu** of the **Performance Workcenter**. Select **Approve Perform/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

- Enter the information for the employee. Then select the magnifying glass next to **Document Type**.

Select Transaction to Approve

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

Filter Criteria

First Name GARY Last Name Cheng
 Manager First Name Last Name
Document Type Document Template ID
 Period Between [] - []

Search Clear

6. Clicking the magnifying glass will bring up the Lookup Document Type menu. Select **UCOPANNL – UCOP Annual Performance Docs.**

Look Up Document Type

Search by: Document Type | begins with |

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-26 of 26 Last

Document Type	Document Description
ANRANNUL	ANR Annual Performance Docs
ANRPROBN	ANR Probationary Perf Docs
DVCANNUL	UCD Campus Staff Appraisal
DVCPROBC	UCD Campus Prob Check Pt Eval
DVCPROBN	UCD Campus Prob Final Eval
DVMANNUL	UCD Health Staff Appraisal
DVMDEVL	UCD Health Development Plan
DVMINCNT	UCD Health CEMRP 2
DVMPROBC	UCD Health Prob Check Pt Eval
DVMPROBN	UCD Health Prob Final Eval
SBIDP	SB Individual Development Plan
SBPERFOM	SB Annual Performance Document
SCCANNUL	SCCMP Annual Performance Docs
SCPROB	SCCMP Probationary Documents
UCANNUL	IRMED Annual Performance Docs
UCINCENT	IRMED Incentive Award Programs
UCOPANNL	UCOP Annual Performance Docs
UCPRBTR	IRMED Probationary Perform Doc
UCRANNUL	UCR Annual Performance Docs
UCRDEVL	UCR Development Documents
UCRECPD	UCR Rehire/Recall Perform Docs
UCRNPEER	IRMED RN Peer/Self Review
UCRPROBN	UCR Probationary Perf Docs
UCSBANNL	UCSB Annual Review
UCSFMANL	SFMED Annual Performance Eval
UCSFMREV	SFMED REVIEW

7. Click **Search**.

Search Clear

8. The performance document(s) matching the filter criteria will come up. The table will show the overall performance rating for the document(s) You can **Approve** or **Deny** from here, or click on the employee name to go to the Approvals page.

Performance Document

Select	Empl ID	Name	Job Title	Department
<input type="checkbox"/>		Gary Cheng	TRAINER 4	816200

Approve Deny

Document ID	Begin Date	End Date	Document Status	Approval Status	Submitted By	2nd Level Approver	Document Type	Summary Rating	Goals & Accomplishments
61839	04/01/2020	03/31/2021	Approval	Pending Approval	Vanessa Cavallaro	Merideth Wakeman	UCOP Annual Performance Docs	Solid Performance	Solid Performance

9. Click on the **Employee Name**. You will be taken to the **Approval Screen**.

Click on **Performance Document Details** to view the performance document. Otherwise, leave your comment in the **Comments** field and **Approve** or **Deny** the document.

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Gary Cheng Empl ID

Actions ▼

Performance Document

Doc Type UCOP Annual Performance Docs

Author Vanessa Cavallaro

Period Begin Date 04/01/2020 Period End Date 03/31/2021

Rating Solid Performance

[Performance Document Details](#)

Evaluation Approval Chain

▼ Doc ID: 61839:Pending

Evaluation Approval Chain

Pending

Merideth Wakeman
ePerformance Approving Mgr

Comment

Approve

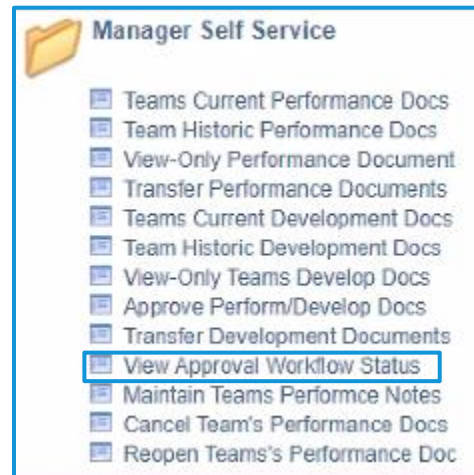
Deny

Go To [Approval Summary](#)

Sharing the Overall Rating with the Employee

1. Once the second-level approver has approved the performance evaluation, the Manager will receive a notification.
2. You can view the comments and the Approval Status by navigating to the Manager Self-Service menu and selecting **View Approval Workflow Status**.

Enter the filter criteria for the document you are seeking. Select the appropriate document and then click on the arrow next to **Doc ID** to expand the box and view comments.



View Approval Status Detail
Review the status of each transaction request.

Miranda Josafat Empl ID [REDACTED]

Performance Document

Doc Type UCOP Annual Performance Docs
Author Merideth Wakeman
Period Begin Date 04/01/2020 Period End Date 03/31/2021
Rating Outstanding
[Performance Document Details](#)

Approving Manager Only

Doc ID: 16520:Denied [View/Hide Comments](#)

Approving Manager Only

Denied
\$Nancy Lynn Pluzdrak - UCOP
ePerformance Approving Mgr
02/04/20 - 2:27 PM

Comments
\$Nancy Lynn Pluzdrak - UCOP at 02/04/20 - 2:27 PM
I am not in agreement with this rating and would suggest you consider an Exceeds expectations.

Go To [Approval Summary](#)

3. **Please note:** The Executive Director of UCOP HR will notify managers via email when the ratings review process is complete and to schedule the final meeting with their employees. The final meeting consists of the managers sharing the overall rating, reviewing and reviewing any multi-rater feedback if applicable.
4. Manager and Employee meet to discuss the yearend appraisal. You will share the overall yearend appraisal and rating.
5. Once the meeting is complete, return to the document. Select the **Share with Employee** button in the top right, then **Confirm**.

[Return to Current Documents](#) |

[Share with Employee](#)



Share with Employee

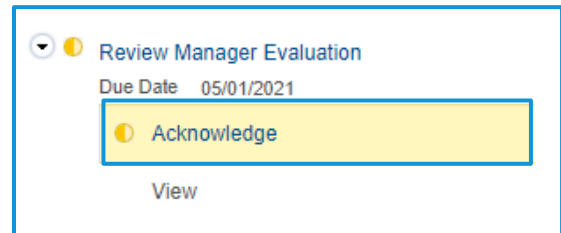
Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

[Confirm](#)

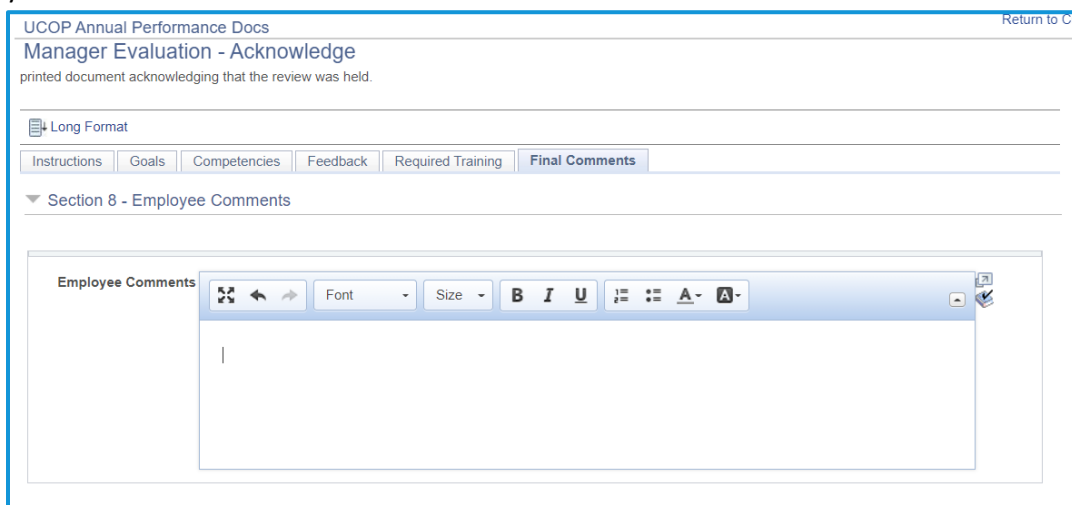
[Cancel](#)

Employee Acknowledgement

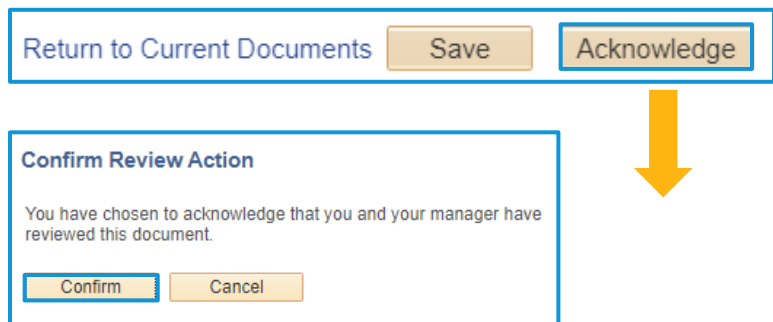
1. Return to your document within the system. Navigate to **Review Manager Evaluation** in the left-hand menu. Click **Acknowledge**.



2. You can review the document if needed. Otherwise, navigate to the **Final Comments** tab and enter your final comments about the evaluation.



3. When you are finished entering your final comments, select the **Acknowledge** button in the upper right-hand corner. Select **Confirm**.



4. You will see a confirmation.

At this point, once you select **Return to Current Documents**, you will no longer have a current document to view.

5. You can access your past performance documents in the main **Performance Workcenter** page under **My Historical Performance Documents**.

