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Glossary

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

Document — The annual performance appraisal form.

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

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.
Step 1: Employee Completes Year-End Evaluation in ePerformance

Logging In

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).

This will bring you to the Performance Document. There are four tabs: Instructions, Goals, Competencies, Final Comments, and Future Goals.
3. Note that the menu on the far left of the screen displays **Nominate Participants** first. This is because you can nominate participants at any time during the performance year.
Self-Assessment of Goals and Accomplishments

1. Go to the Goals tab. Write your self-assessment in the Employee Comments field.

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

2. Click Save when complete.
Competencies

1. Go to the Competencies tab. There are 12 competencies:
   a. Vision
   b. Leadership
   c. Accountability and Governance
   d. People Management
   e. Creativity and Innovation
   f. Interpersonal and Communication Skills
   g. Work Productivity and Quality
   h. Diversity
   i. Principles of Community
   j. Resource Management and Financial Budget
   k. Client Service
   l. Health and Safety

2. Write your self-assessment for each competency in the Employee Comments field.

3. Go to the Employee Rating drop-down menu to rate each competency. For a detailed definition of each rating, click on the notes icon next to the Employee Rating menu.

4. Repeat Steps 2 and 3 for all competencies.

5. Save when complete.
Final Comments

1. Go to the Final Comments tab. In the Employee Rating drop-down, select your overall rating for your performance year. Select the icon next to the rating box for descriptions of each rating.

2. Save when complete.
Future Performance Goals and Objectives

1. Go to the Future Goals tab.

2. Select Add Item.

3. Enter a title for your goal. Write your goal clearly in the Description field. Establish a goal that is specific, measurable, achievable, relevant, and time-based.

4. Repeat steps 1-3 above for each new goal.

5. Save when complete.
Step 2a: 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.

Note: If you want to select a rater outside of UCOP, you must communicate via email for their multi-rater contribution. You can only use the ePerformance system for multi-rater participants at UCOP.
Once you select the intended participant, click **OK**.

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

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.

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

1. The nominated Participant will receive an email requesting their participation in the review process.

2. Log into UC Path and selects Performance Work Center. Navigate to the left-hand menu and select Others Pending Perf Evaluation Requests.

3. You can accept or decline nominations from this window.

4. If declining, enter a comment and submit.
5. If accepting, **Accept** the nomination.

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

7. 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.

8. To complete and submit, selects **Complete** in the upper-right menu, then select **Confirm**.
Step 2b: Review Participant Evaluations (Optional Multi-Rater)

Manager Reviews

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.
Step 3: Manager Evaluation

Logging In

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.

Note: Two people cannot be in the same performance document at a time. If one person is in the document, a second person trying to access the same document will receive an error message.
3. To review the employee’s progress on their goals in their self-evaluation, go to the left-hand menu and click the arrow next to Review Self Evaluation. Then click View Self Evaluation.

4. The employee’s self-evaluation will open in a separate tab for you to review.
Goals

1. After you are finished reviewing the employee’s goals, return to the document. Go to the Goals tab. Enter your comments on the employee’s progress in the Manager Comments field.

2. Save when complete.
Competencies

1. Go to the **Competencies** tab. There are twelve competencies.
   a. Vision
   b. Leadership
   c. Accountability and Governance
   d. People Management
   e. Creativity and Innovation
   f. Interpersonal and Communication Skills
   g. Work Productivity and Quality
   h. Diversity
   i. Principles of Community
   j. Resource Management and Financial Budget
   k. Client Service
   l. Health and Safety

2. Review the employee’s comments and ratings on their progress for each of the twelve competencies.

3. For each of the twelve competencies, submit your rating in the **Manager Rating** drop-down menu.

4. Click the **Ratings Descriptions button** to the right of the drop-down ( ) for detailed descriptions of each rating to ensure accuracy.

5. **Save** when complete.
Final Comments

1. Go to the Final Comments Tab.

2. Submit your rating in the Manager Rating drop-down menu. Click the Ratings Descriptions button to the right of the drop-down ( ) for detailed descriptions of each rating to ensure accuracy.

3. Write your comments in the Manager Comments field. Please note, the Employee Comments section below will be filled out by the employee after the final evaluation meeting, when the employee acknowledges the document in the system.

4. Save when complete.
Future Performance Goals and Objectives

1. Return to the tab with the employee’s self-evaluation document to review their entries for the Future Goals and Objectives.

2. Review the entry.
Submit for Approval

1. When you have completed the Manager Evaluation, click the Submit for Approval button

![Submit for Approval button]

2. Then select Confirm. Select Cancel to return to the document.

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 Outstanding Top Performer.

![Submit for Approval button]

![Confirm and Cancel buttons]
2nd Level Approvals

1. Second-level Approver logs into UC Path and selects **Worklist** in the left-hand navigation menu.

2. Select the document in the worklist.

3. Select the appropriate performance document to review.

4. To review the performance document, select **Performance Document Details**.
5. When you have finished reviewing the document, select Return to Performance Document Approval at the bottom of the screen.

6. You can Approve or Deny from the main worklist screen.

Enter your comment in the Comment field for the Manager on your reasoning for the approval or denial.

7. Select Close.
Manager Checks Approval Status

1. Once the second-level approver has approved or denied 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.

Click on the arrow next to Doc ID to expand the box and view comments.
Manager and Employee Discuss Evaluation

3. Once the performance document is approved, the Manager returns to the performance document in the system. The document menu will now be at the Share with Employee status.

4. Select the Share with Employee button in the top right, then Confirm.
Step 4: Final Discussion and Employee Acknowledgement

Sit Down Together!

1. Manager and Employee meet to discuss the yearend appraisal. You will share the overall yearend appraisal and rating.

Employee Acknowledgement

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

2. Review the Goals and Competencies tabs for your manager’s final ratings and comments.
3. Go to the **Final Comments** tab. You will see your rating and comments from your manager.

4. Enter your final comments about the evaluation in the **Employee Comments** field.

5. When you are finished entering your final comments, select the **Acknowledge** button in the upper right-hand corner. Select **Confirm**.
6. 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.

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