

**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).

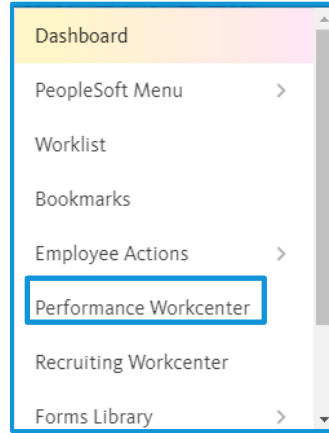
**Second-level approver** – The individual approving the Manager Evaluation and rating choice prior to the Manager and Employee meeting to review the yearend appraisal.

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

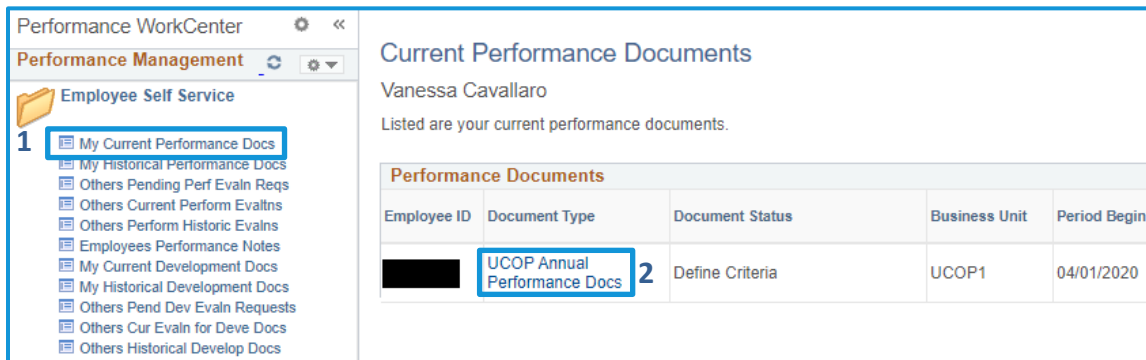
## Step 1: Define Criteria (Set Goals)

### Employee Goes First

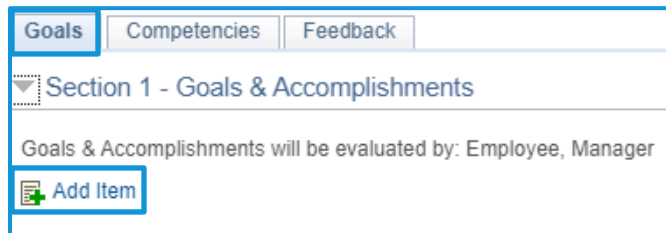
1. Log into UCPATH and select **Performance Workcenter** in the left menu.



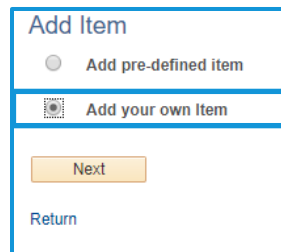
2. Click **My Current Performance Docs (1)**. Click on the **document name** you wish to view (2).



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.  
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

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

Goals Competencies Feedback

▼ Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager

**Add Competency**

7. 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**

8. 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**

9. 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

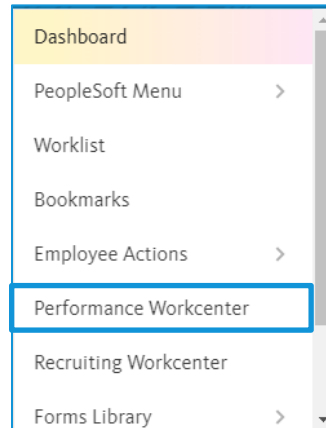
**Add**

10. 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.)

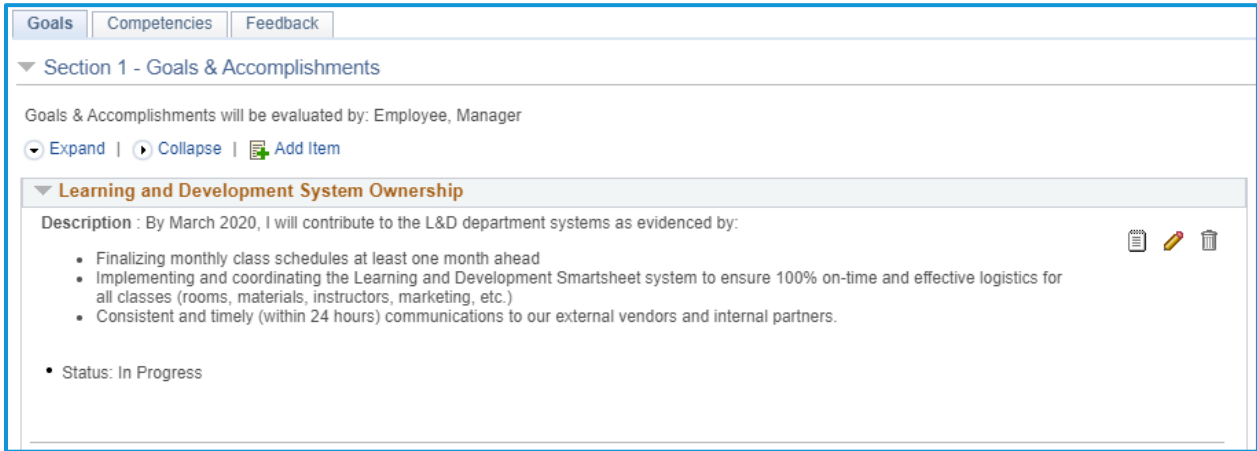
The screenshot shows the Oracle Performance Workcenter interface. The left sidebar has 'Performance Management' selected, with 'Employee Self Service' and 'Manager Self Service' sub-sections. Under 'Manager Self Service', 'Teams Current Performance Docs' is highlighted with a blue box and a '1'. The main content area is titled 'Current Performance Documents' and includes a 'Filter Criteria' section with fields for First Name, Last Name, Document Type, Document Status, Period Between, Job Code, Department Set ID, and Department. Below the filters is a table of 'Performance Documents'.

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

The name 'Vanessa Cavallaro' in the table is highlighted with a blue box and a '2'.

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.



The screenshot shows a web interface with three tabs: 'Goals', 'Competencies', and 'Feedback'. The 'Goals' tab is active. Below the tabs is a section titled 'Section 1 - Goals & Accomplishments'. Underneath, it says 'Goals & Accomplishments will be evaluated by: Employee, Manager'. There are three buttons: 'Expand', 'Collapse', and 'Add Item'. A goal titled 'Learning and Development System Ownership' is expanded. Its description is: 'By March 2020, I will contribute to the L&D department systems as evidenced by:'. To the right of the description are three icons: a calendar, a pencil, and a trash can. The goal has a bulleted list of three items: '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.)', and 'Consistent and timely (within 24 hours) communications to our external vendors and internal partners.'. Below the list, it says '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  |

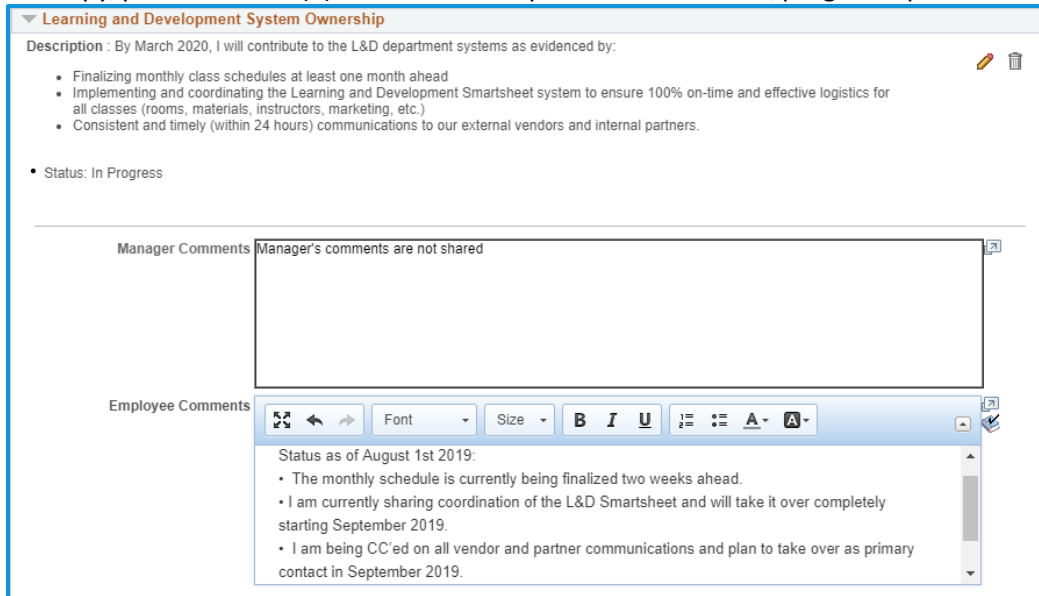


## Step 2: Checkpoints (Check-Ins)

### 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

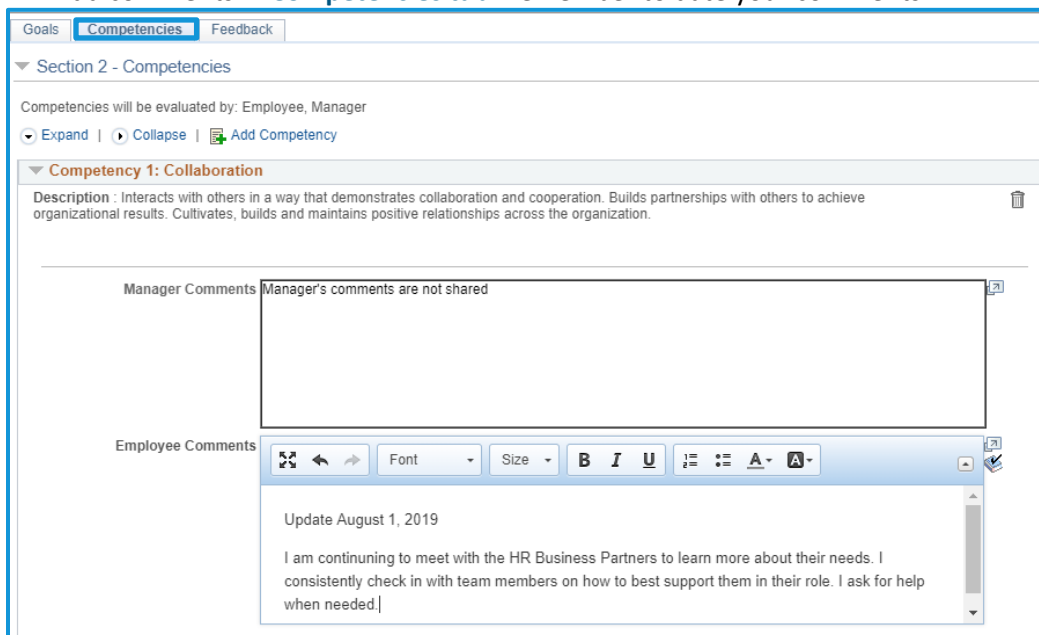
Manager Comments: Manager's comments are not shared

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.

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



Goals **Competencies** Feedback

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.

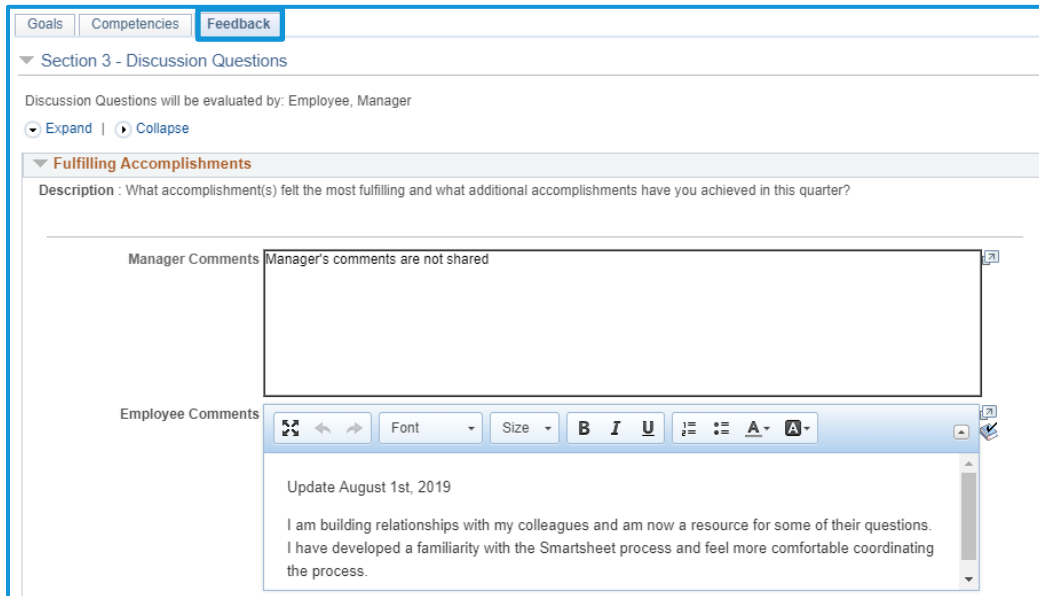
Manager Comments: Manager's comments are not shared

Employee Comments

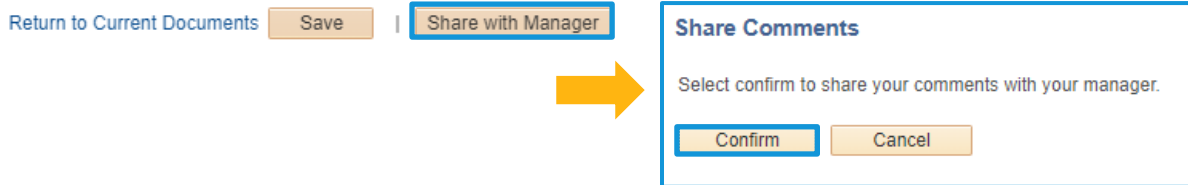
Update August 1, 2019

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!

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



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



## Manager Reviews and Comments

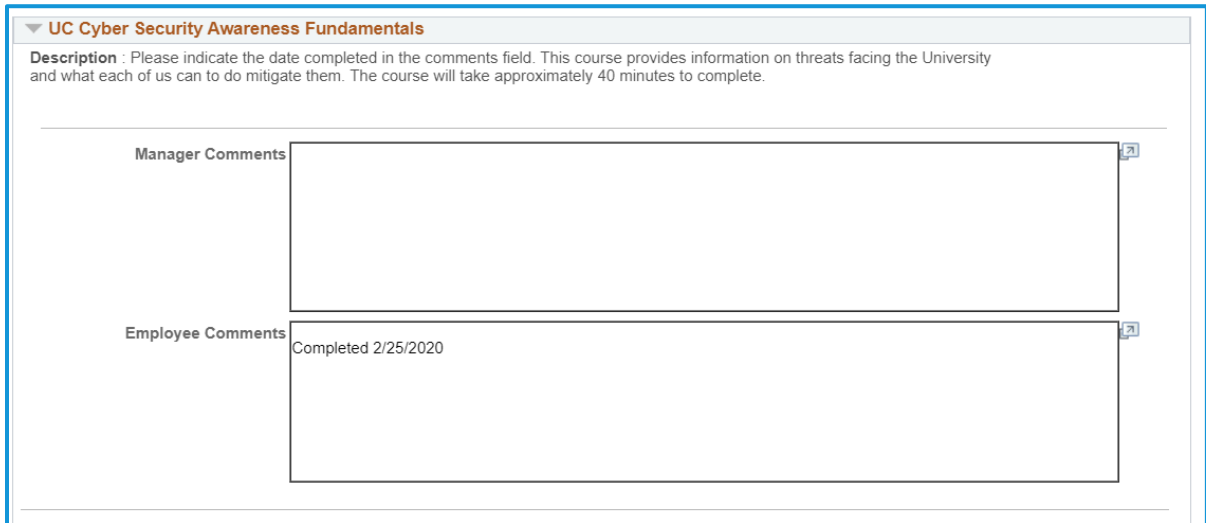
1. Following the same login instructions from [Define Criteria](#): Log into UC Path and select **Performance Workcenter** and then **Teams Current Performance Docs**. Select the employee document you are reviewing.
2. Review Employee comments on the **Goals tab**. Add your own comment above the Employee's.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

When finished, click **Save**.

The screenshot displays a goal titled "Learning and Development System Ownership". The description states: "By March 2020, I will contribute to the L&D department systems as evidenced by:" followed by a bulleted list of tasks: "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.)", and "Consistent and timely (within 24 hours) communications to our external vendors and internal partners." The status is "In Progress".

Below the description is a "Manager Comments" section with a rich text editor toolbar (including icons for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, text color, and background color). A comment is entered: "8/2/19 – Great. Let's talk about where you need support." Below this is an "Employee Comments" section with the text: "Status as of August 1st 2019:" followed by a bulleted list: "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", and "I am being CCed on all vendor and partner communications, and plan to take over sas primary contact in September 2019".

3. Review the status of the required compliance trainings on the **Required Training** tab and add comments if needed.



**UC Cyber Security Awareness Fundamentals**

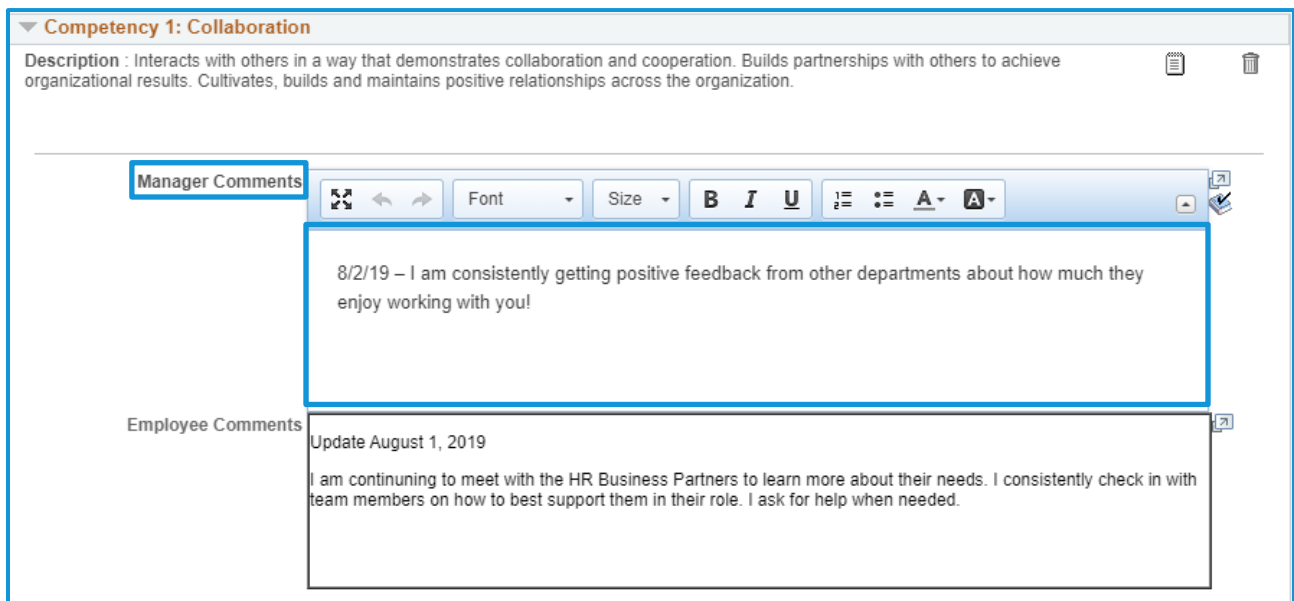
**Description :** Please indicate the date completed in the comments field. This course provides information on threats facing the University and what each of us can do to mitigate them. The course will take approximately 40 minutes to complete.

Manager Comments

Employee Comments  
Completed 2/25/2020

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

When finished, click **Save**.



**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!

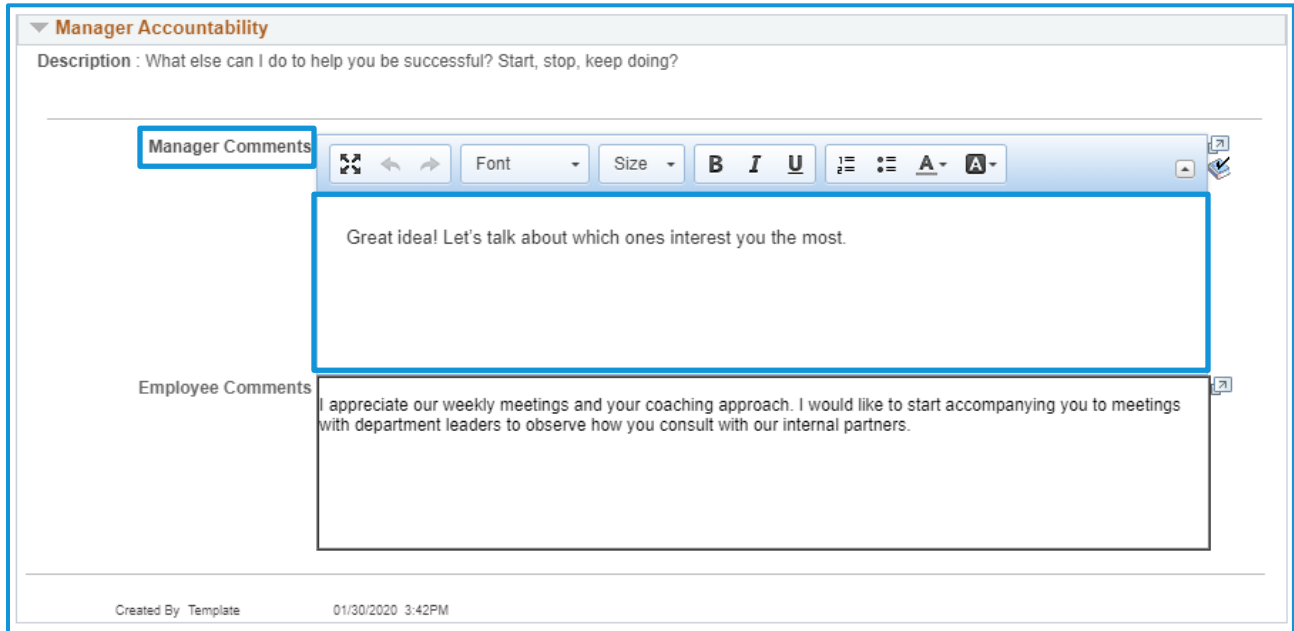
Employee Comments

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.

5. 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!**

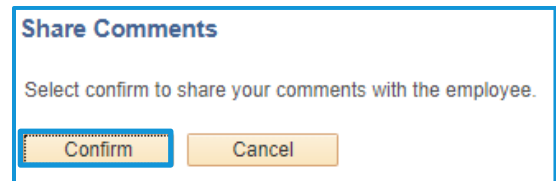
When finished, click **Save**.



The screenshot shows a feedback form titled "Manager Accountability" with the description: "What else can I do to help you be successful? Start, stop, keep doing?". It features two text input areas. The "Manager Comments" area contains the text: "Great idea! Let's talk about which ones interest you the most." The "Employee Comments" area contains the text: "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." The form also includes a rich text editor toolbar and a footer with "Created By: Template" and "01/30/2020 3:42PM".

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

Return to Current Documents   |



The "Share Comments" dialog box contains the text: "Select confirm to share your comments with the employee." Below this text are two buttons: "Confirm" and "Cancel".

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

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## Sit down together!

8. 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.**

9. 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


## Step 3: Finalize Criteria (Employee Self-Appraisal)

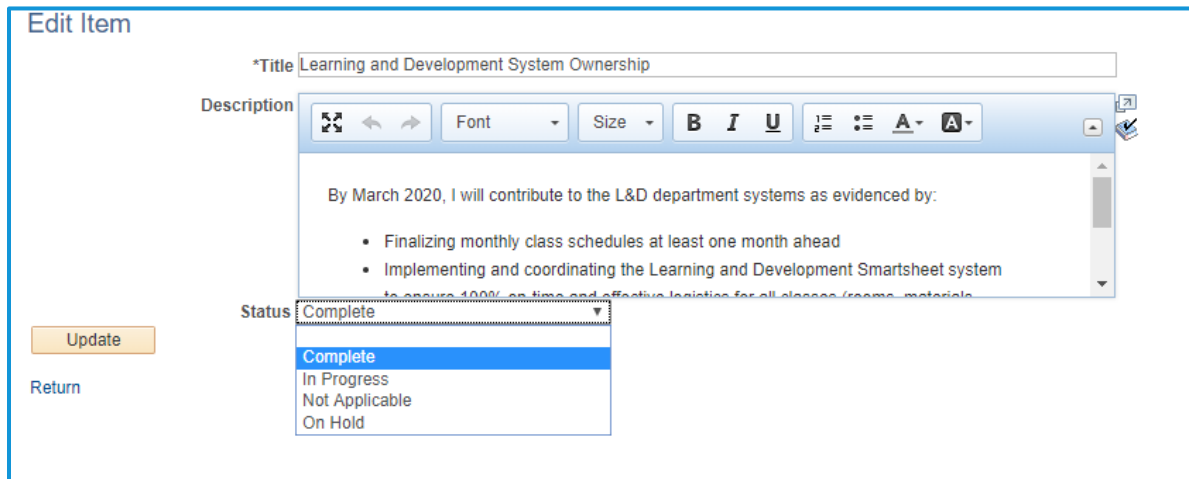
### Employee Goes First

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. Manager comments will not be shared at this step.**

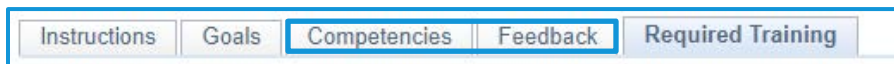
**Best Practices:** (1) **Date your comments**, (2) Use brief bullet points of milestones/progress updates, (3) **Save often!** Or write your goals in MS Word and copy/paste them in.

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



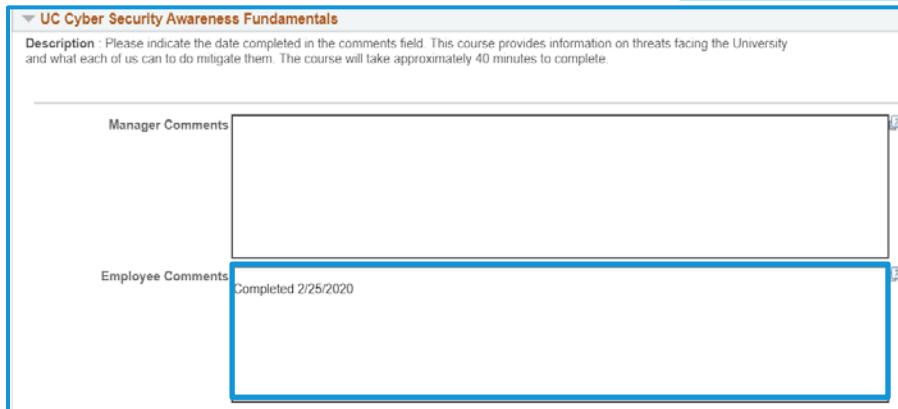
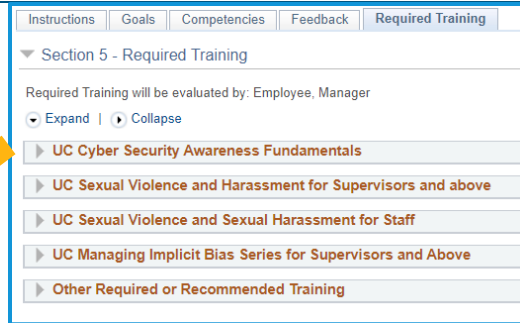
The screenshot shows the 'Edit Item' form. At the top, the title is 'Learning and Development System Ownership'. Below the title is a rich text editor for the description, containing the text: 'By March 2020, I will contribute to the L&D department systems as evidenced by:' followed by two bullet points: 'Finalizing monthly class schedules at least one month ahead' and 'Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on time and effective logistics for all classes (rooms, materials...'. Below the description is a 'Status' dropdown menu with options: 'Complete', 'In Progress', 'Not Applicable', and 'On Hold'. The 'Complete' option is currently selected. To the left of the status dropdown are an 'Update' button and a 'Return' link.

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

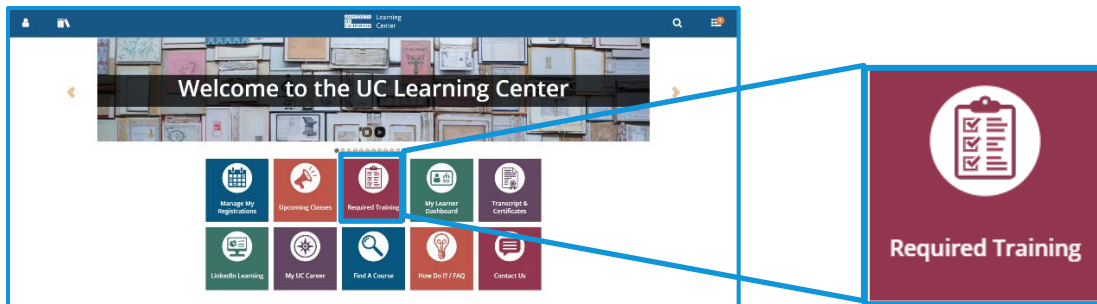


The screenshot shows a horizontal navigation bar with five tabs: 'Instructions', 'Goals', 'Competencies', 'Feedback', and 'Required Training'. The 'Competencies' and 'Feedback' tabs are highlighted with a blue border, indicating they are the active sections for adding comments.

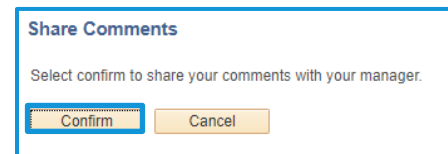
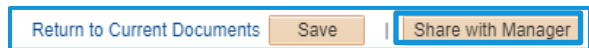
4. Add the dates of completion for the compliance trainings in the comment boxes in the **Required Training** tab.



Tip: To check the status and completion date of your required training, log into the UC Learning Center at [ucop.edu/ucoplearningcenter/](http://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.





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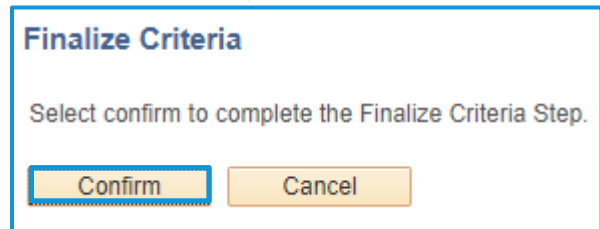
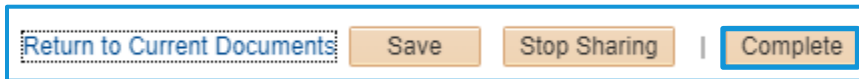
## Manager Reviews

1. Navigate to the performance document and review the Employee’s updated status and comments on **Goals**, **Competencies**, **Feedback**, and **Required Training**.

**Note:** It is not necessary to add comments during this step as there is a separate step for managers after criteria are finalized and approved

2. When ready to complete, **Save** and then 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 final yearend appraisal and overall rating.



3. Select **Return to Current Documents**.

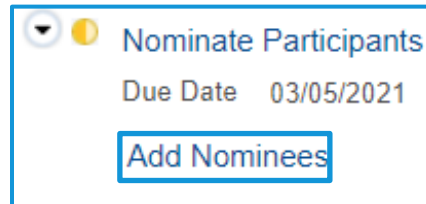
## Step 4a: Nominate Participants (Optional Multi-Rater)

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.

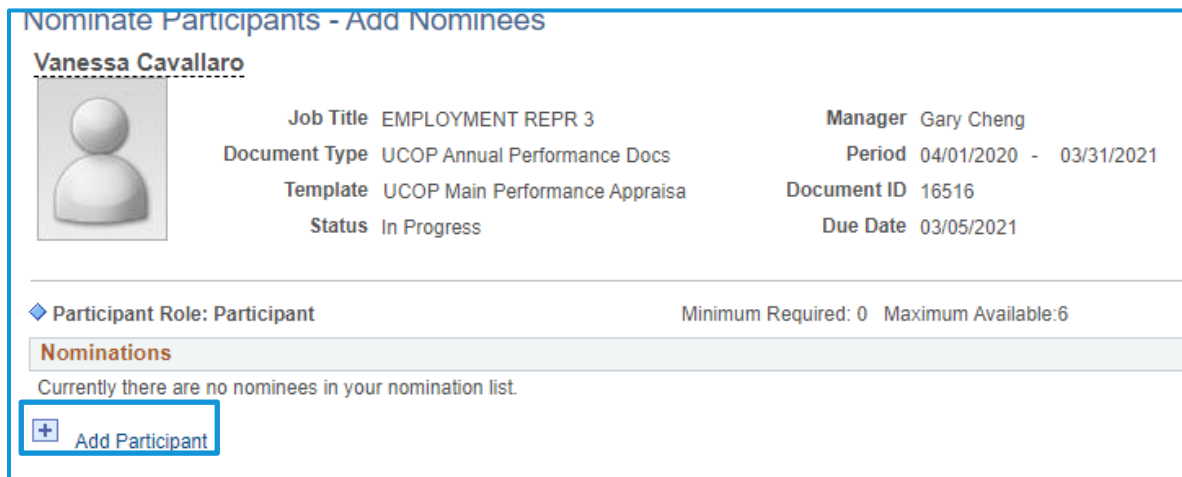
### Employee and Managers nominate participants

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.

A screenshot of a web application interface titled 'Nominate Participants - Add Nominees'. At the top, the name 'Vanessa Cavallaro' is displayed above a grey placeholder icon. To the right of the icon, several fields are listed: 'Job Title' (EMPLOYMENT REPR 3), 'Document Type' (UCOP Annual Performance Docs), 'Template' (UCOP Main Performance Appraisa), and 'Status' (In Progress). Further right, 'Manager' (Gary Cheng), 'Period' (04/01/2020 - 03/31/2021), 'Document ID' (16516), and 'Due Date' (03/05/2021) are shown. Below this information, a section titled 'Participant Role: Participant' includes the text 'Minimum Required: 0 Maximum Available:6'. A 'Nominations' section follows, stating 'Currently there are no nominees in your nomination list.' At the bottom left, a blue button with a plus sign and the text 'Add Participant' is highlighted with a blue rectangular border.

Nominate Participants

▶ **Instructions**

**Search Criteria**

Last Name

Business Unit

First Name

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

Person Search

Nominate Participants

▶ **Instructions**

**Search Criteria**

Last Name

Business Unit

First Name

**Search Results**

<input checked="" type="checkbox"/> Miranda Josafat	<input type="button" value="i"/>
-----------------------------------------------------	----------------------------------

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

[Return to Current Documents](#)

✔ You have successfully saved your nominations.

◆ Participant Role: Participant Minimum Required: 0 Maximum Available:5

**Nominations**

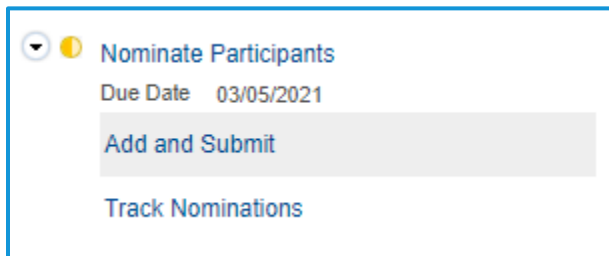
Nominee	Action
Miranda Josafat	<input type="button" value="trash"/>


Add Participant

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

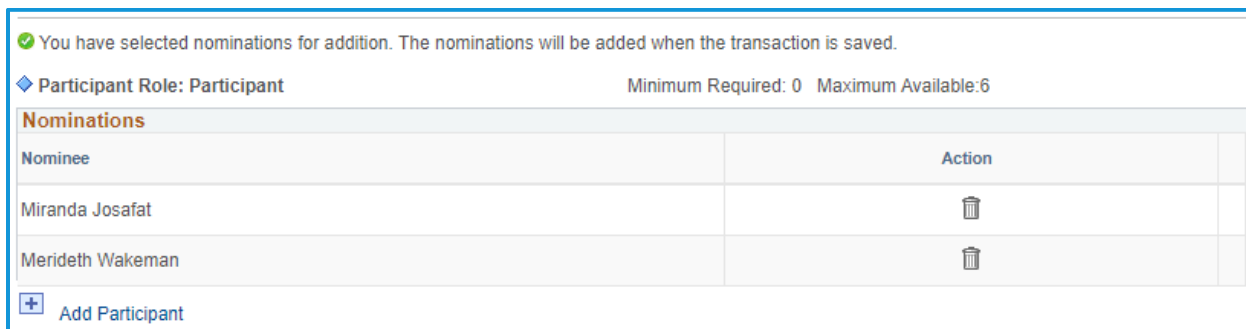
## Manager approves nominated participants

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**.



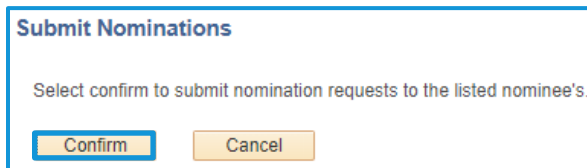
2. Manager can search and add nominees for Participant Evaluations using the same process as the Employee. Manager is able to remove any nominations using the **Delete** icon (  ).

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



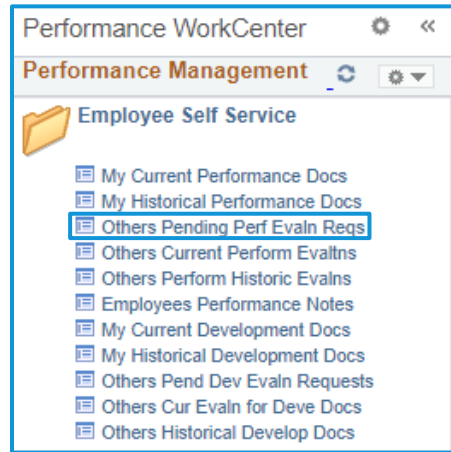
3. Once all Participant Evaluation nominees are listed, select **Save** and then **Submit Nominations**. Select **Confirm** to send nomination requests to the participants.

[Return to Current Documents](#)  |



## 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.

The screenshot shows the 'Pending Evaluation Requests' window. It contains a table with the following data:

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

Below the table are 'Select All' and 'Deselect All' links, and 'Accept' and 'Decline' buttons.

4. If declining, enter a comment and submit.



The screenshot shows the 'Decline Evaluation Requests' window. It contains a warning message: **Are you sure you want to decline these evaluation requests?** Below this is a table with the following data:

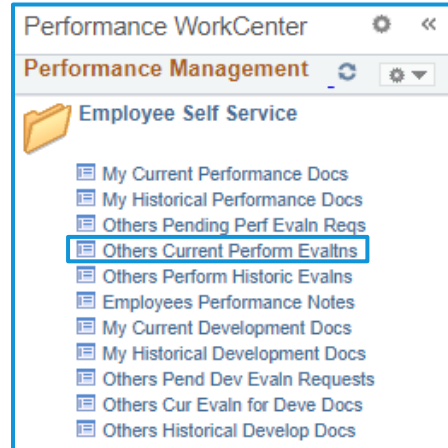
Name	Document Type	Due Date
Alfred Garrett	UCOP Annual Performance Docs	04/24/2021

Below the table is a text area for 'Enter Comments:' with the text: 'I don't feel like i have worked with this individual enough to provide pertinent feedback'. At the bottom are 'Yes' and 'No' buttons.

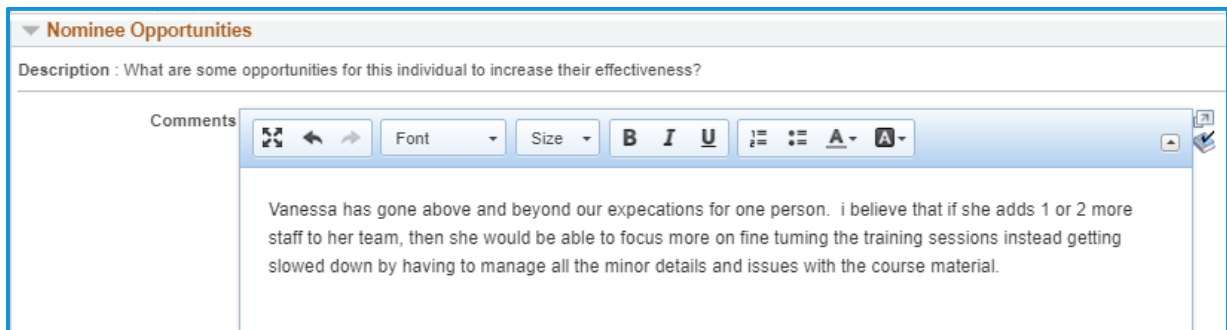
5. If accepting, **Accept** the nomination.



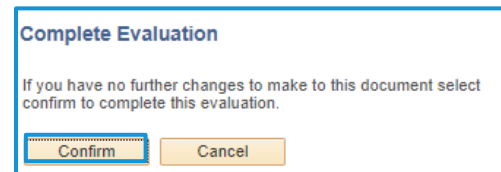
6. To fill out the evaluation, navigate back to the main ePerformance menu and select **Others Current Performance Evaluations**.



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.



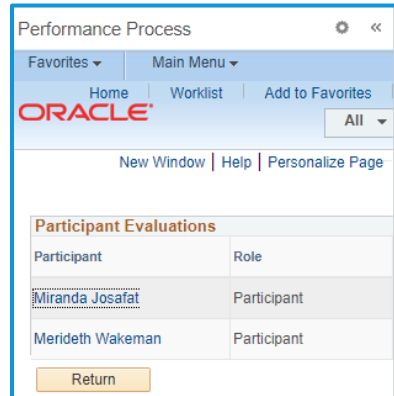
8. To complete and submit, selects **Complete** in the upper-right menu, then select **Confirm**.



## Step 4b: Review Participant Evaluations (Optional Multi-Rater)

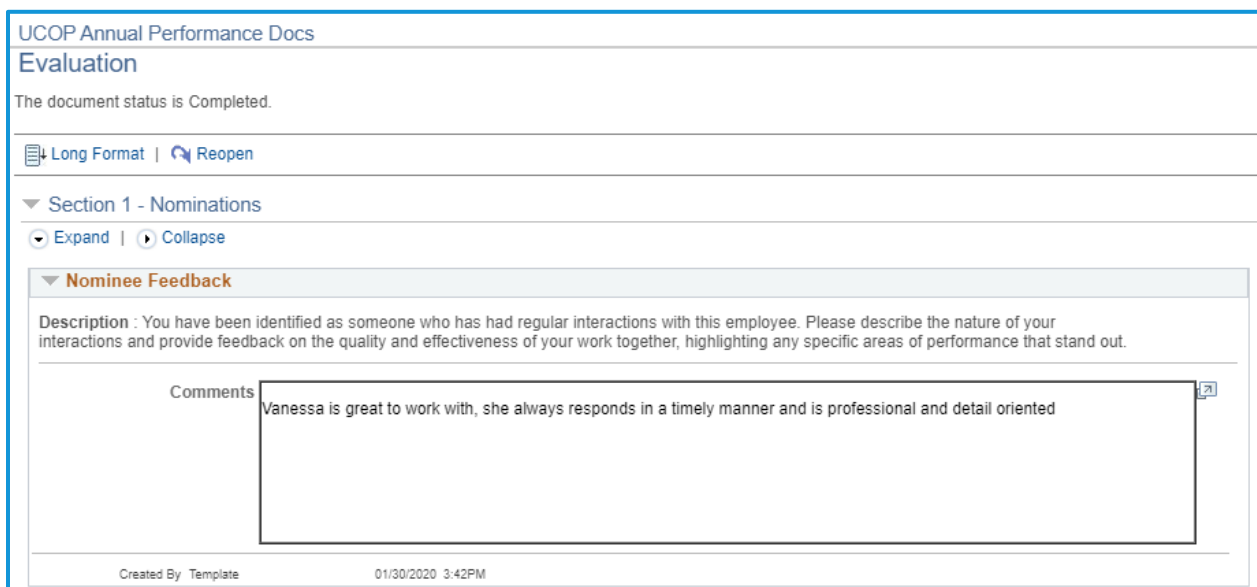
### Manager Reviews

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.**



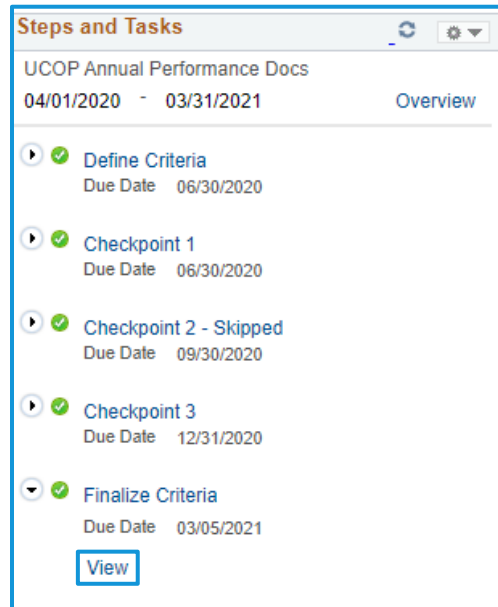
The screenshot shows the UCOP Annual Performance Docs Evaluation form. The document status is 'Completed'. There are options for 'Long Format' and 'Reopen'. The form is divided into sections, with 'Section 1 - Nominations' expanded. Under 'Section 1 - Nominations', there is a 'Nominee Feedback' section. The 'Description' for this section reads: '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.' Below the description is a 'Comments' text area containing the text: 'Vanessa is great to work with, she always responds in a timely manner and is professional and detail oriented'. At the bottom of the form, it shows 'Created By: Template' and the date '01/30/2020 3:42PM'.

## Step 5: Complete Manager Evaluation (Yearend Appraisal)

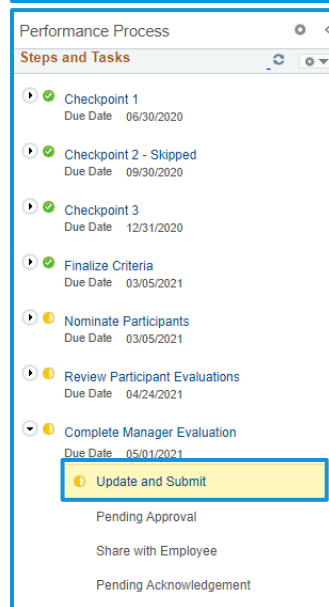
### Manager Goes First

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.



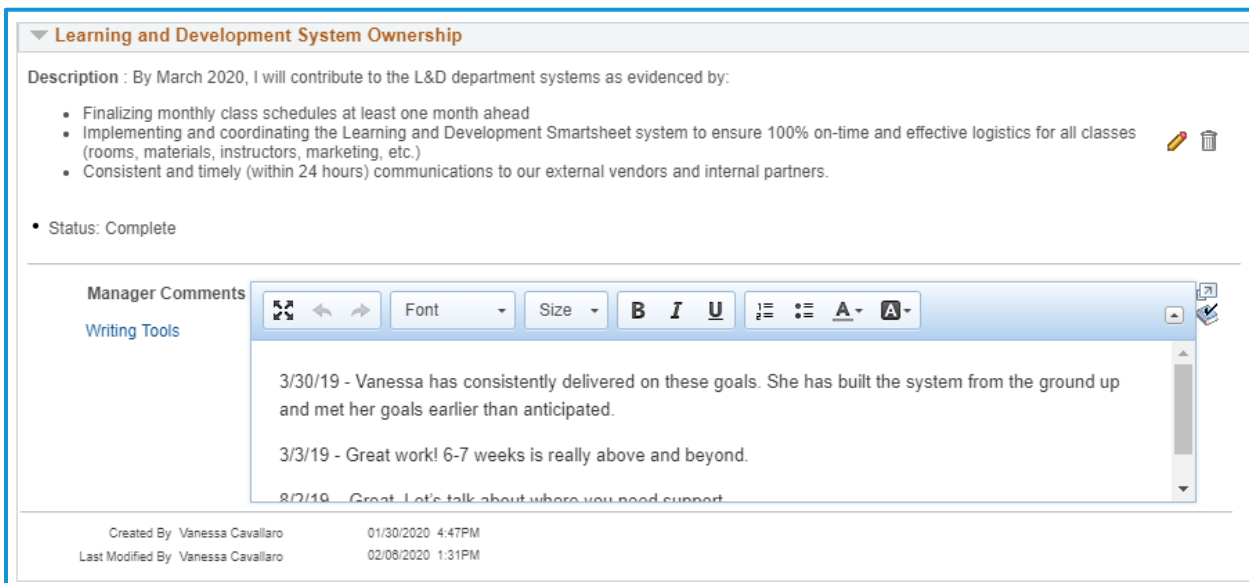
2. When ready to complete, navigate to **Complete Manager Evaluation** in the left-hand menu and select **Update and Submit**.



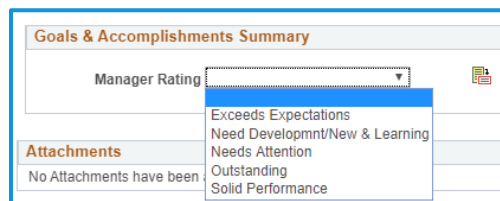



3. Enter your final comments that will justify the overall rating on the Employee’s **Goals**, **Competencies**, and **Feedback** tabs prior to submit your ratings.

**TIP:** Remember to **Save!**



4. 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.



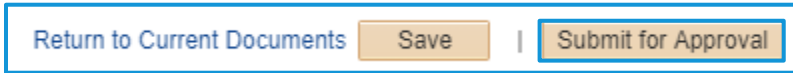
5. Click the **Ratings Descriptions** button to the right of the drop-down (  ) for detailed descriptions of each rating to ensure accuracy. You can select the rating from this screen as well and then click **Select Proficiency**.

Rating	Description
Outstanding	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>Demonstrates superior interpersonal skills, is respected by others, and is sought after to participate in or lead projects and work groups</li> </ul>
Exceeds Expectations	<ul style="list-style-type: none"> <li>Very high level of contribution</li> <li>Consistently performed above and beyond all defined expectations</li> </ul>
Solid Performance	<ul style="list-style-type: none"> <li>Consistently demonstrates core job knowledge, skills, and abilities to effectively perform job functions. May occasionally exceed expected performance</li> <li>Consistently achieves all goals within control, in planned timelines</li> <li>Shares ideas, information, skills, and knowledge; listens and is responsive to manager and others; maintains a positive attitude</li> </ul>
Need Development/New & Learning	<ul style="list-style-type: none"> <li>Performance expectations partially met</li> <li>Moderate level of contribution</li> <li>Some critical goals completed</li> <li>Achievement below expectations</li> <li>Improvement needed in the position</li> <li>New in position, developing appropriately.</li> </ul>

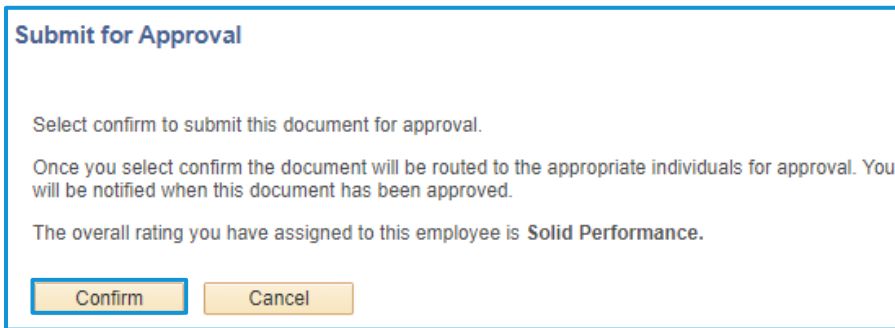


Select Proficiency

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



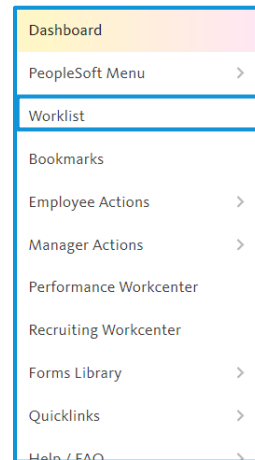
The screen will display the overall rating you selected for the Employee. Select **Confirm** to move forward, or **Cancel** to return to the document and edit.



7. The left-hand menu will now be at the **Pending Approval** step under **Complete Manager Evaluation**.

## 2nd Level Approvals

1. 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.

The screenshot shows the 'Approve Document' interface for Vanessa Cavallaro. The document is titled 'Performance Document' and is in a 'Pending' status. The author is Gary Cheng, and the period is from 04/01/2020 to 03/31/2021. The rating is 'Solid Performance'. Under the 'Approving Manager Only' section, Julie Beth Miller is listed as the approving manager. A comment field is present but empty. 'Approve' and 'Deny' buttons are at the bottom.

- 3. Save the status.

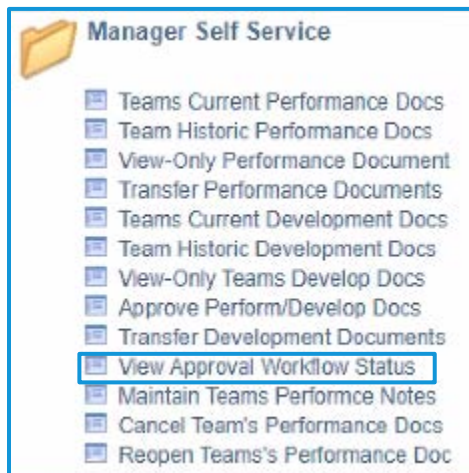
The screenshot shows a 'Save Confirmation' dialog box with a checkmark icon and the text 'The Save was successful.' A 'Close' button is located at the bottom.

The screenshot shows the 'Approve Document' interface for Vanessa Cavallaro, now in an 'Approved' status. The document details are the same as in the previous screenshot. Under the 'Approving Manager Only' section, Julie Beth Miller is listed as the approving manager with a green checkmark and a timestamp of 02/07/20 - 11:50 AM.

## Sit down together!

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.



The image shows a screenshot of the 'View Approval Status Detail' page. The page title is 'View Approval Status Detail' and the subtitle is 'Review the status of each transaction request.' The user name is 'Miranda Josafat' and the employee ID is redacted. The document type is 'UCOP Annual Performance Docs', the author is 'Merideth Wakeman', the period begins on '04/01/2020' and ends on '03/31/2021', and the rating is 'Outstanding'. The page is titled 'Approving Manager Only' and shows a document with 'Doc ID: 16520:Denied'. A yellow arrow points to the 'Doc ID' field. Below the document details, there is a 'Comments' section with a comment from 'Nancy Lynn Pluzdrak - UCOP ePerformance Approving Mgr' dated '02/04/20 - 2:27 PM' stating: 'I am not in agreement with this rating and would suggest you consider an Exceeds expectations.'

3. Manager and Employee meet to discuss the yearend appraisal. You will share the overall yearend appraisal and rating.
4. 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

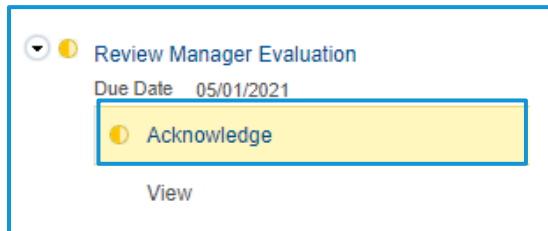
Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

**Confirm**

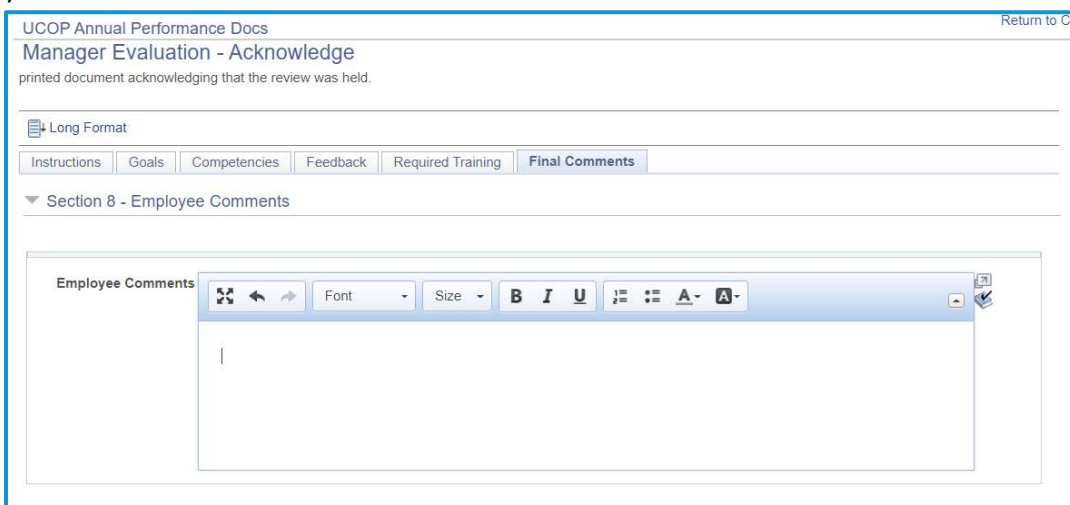
**Cancel**

## Employee Acknowledgement

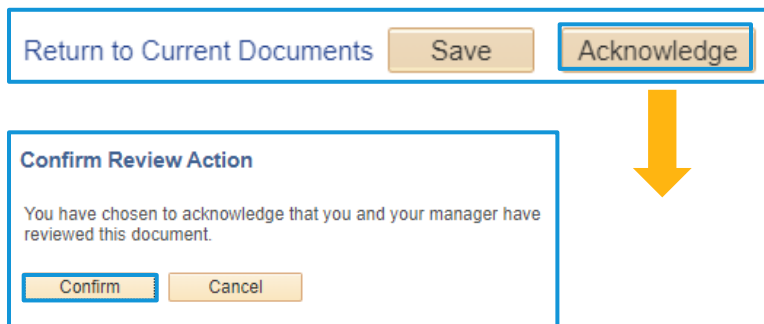
1. Return to your document within the system. Navigate to **Review Manager Evaluation** in the left-hand menu. Click **Acknowledge**.



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

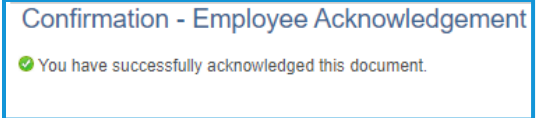


3. When you are finished entering your final comments, select the **Acknowledge** button in the upper right-hand corner. Select **Confirm**.



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**.

