

# UCPath ePerformance

## Annual Staff Performance Appraisal Process (2024) Supervisor Focus

Presented by ANR Human Resources  
March 2024

# Expected Outcomes of Today's Session

- 1) Learn how to access and use the ePerformance (web-based) system
- 2) Obtain the information, tools, and resources you need to make the Performance Evaluation process meaningful and productive.

Zoom Information sessions:

*Employee Role:* Wednesday, March 6, | 1-2pm

*Supervisor Role:* Tuesday, March 20, | 1-2pm

# Agenda

1. Overview - Annual Staff Performance Evaluation Process
2. Roles and Responsibilities
3. Annual Evaluation Timeline
4. Practical Tips for Supervisors and Employees
5. UCPATH ePerformance System
6. Employee Process
7. Supervisor Process
8. Resources

Helpful resources are available on the Supervisor Resources > Performance Management web page.  
[\(https://ucanr.edu/sites/ANRSPU/SupervisorResources/Performance Management/\)](https://ucanr.edu/sites/ANRSPU/SupervisorResources/Performance%20Management/)

# Overview of the Annual Staff Performance Evaluation Process

- Why do we prepare performance evaluations?
  - Required and appropriate
- What period is under review?
  - April 1, 2023 through March 31, 2024
- When does the process take place?
  - Annual review process runs from March 6, 2024 through June 30, 2024
- Where do we complete the review process?
  - Web-based ePerformance System
- Who will be evaluated?
  - All non-represented and represented career and contract staff employees  
(only contract employees appointed 6 months +)

## **This process does not apply to the following:**

Academics	Limited Term Employees (optional) Separating/Retiring (optional)
Student Employees	Per Diem Employees
Rehired Retirees (optional)	Contract Employees ( <i>less than 6 month appt.</i> )
Temp Employment Service	Employees hired on or after to Sep. 30, 2023 (mid pt. review will suffice for probationary employees)

# Roles and Responsibilities

## Manager's Role

- **Set** goals and expectations
- **Give** employees the insight needed to achieve key outcomes
- **Hold** employees accountable
- **Enable** meaningful performance conversations
- **Support** employees' development plans

## Employee's Role

- **Understand** what performance management means
- **Participate** actively in the ongoing process
- **Discuss** performance expectations
- **Own** their performance and career development
- **Ask** for performance feedback

## Human Resources

- **Act** as an objective 3<sup>rd</sup> party
- **Support** managers and employees in understanding performance management and differentiated pay for relative performance
- **Provide** tools, training, and coaching.

# Annual Evaluation Timeline

Mar 6-Apr 2	<ul style="list-style-type: none"><li>• Employee completes the ePerformance self-evaluation</li></ul>
April 3 -May 10	<ul style="list-style-type: none"><li>• Supervisor meets with employee to review the ePerformance self-evaluation</li><li>• Supervisor completes the manager evaluation fields</li><li>• <b>Supervisor routes ePerformance evaluation to second level approver</b></li><li>• <b>Second level approver reviews and approves evaluation</b></li></ul>
May 10	<ul style="list-style-type: none"><li>• <b>Deadline for ePerformance evaluations with proposed overall ratings</b></li></ul>
May 11 -June 3	<ul style="list-style-type: none"><li>• Calibration committee reviews proposed ratings for consistency and confirms final ratings</li></ul>
By June 16	<ul style="list-style-type: none"><li>• HR communicates to unit directors/ dept. heads that calibration is complete</li><li>• HR approves the final evaluations in ePerformance</li></ul>
By June 30	<ul style="list-style-type: none"><li>• Supervisors share final results with employees</li><li>• Employees acknowledge receipt</li></ul>

# Practical Tips for Supervisors

- Review and share the Guidelines and FAQs with your staff and supervisors
- Confirm with your staff that they are able to log into UCPATH
- Confirm that your direct reports are listed in your UCPATH Online Dashboard
- When you receive an email notification that a performance document has been created for your employee check in with them to ensure they received their notice. Remind them of their deadline to complete their self-evaluation.
- Plan to meet with the employee when you receive notification that they have completed their self-evaluation for clarification purposes
  - Performance and ratings are not discussed at this stage. It is merely to obtain clarification on any items you want to address. This is not required, but encouraged.
- As you prepare to draft the evaluation for your staff, review previous performance appraisals, including-
  - Expectations and Goals
  - Opportunities for improvement and training plans
- Refer to ANR Performance Standards when rating core competencies
- Identify key organizational and unit goals in Strategic Plans, work plans, your PR, etc.
  - Ensure your employees are aware of how they support your mission and the division as a whole.
- Plan to provide feedback when you get to the final stage. Discuss evaluation and future direction/ goals.

<b>ANR Performance Standards</b>					
<b>Competency</b>	<b>Exceptional</b>	<b>Exceeds Expectations</b>	<b>Meets Expectations</b>	<b>Partially Meets Expectations</b>	<b>Improvement Needed</b>
<b>Communication</b>	Is an excellent communicator, both verbally and in writing	Is a strong communicator, both verbally and in writing	Consistently uses clear and appropriate language, both verbally and in writing. Readily shares work-related information.	Sometimes unclear in verbal or written communication	Verbal and/or written communications often are unclear or inaccurate
<b>Diversity and Inclusion</b>	Appropriately encourages and incorporates diverse points of view for enhanced results  Actively seeks opportunities to incorporate diversity of ideas into projects and processes	Promotes inclusivity of diverse opinions/ideas among colleagues  Promotes equity and inclusion by actively seeking ideas and insights from diverse groups	Values differences and applies others' perspectives to get results  Sensitive to cultural norms, expectations, and ways of communicating  Uses inclusive and non-offensive language and behaviors	Inconsistently involves a diversity of people and ideas in making decisions  Discourages different points of view  Expects everyone to adapt to their way of thinking and communicating	Does not value, encourage, or adapt to different perspectives  Lacks sensitivity of other cultural norms or ways of communicating  Uses language and behavior that is exclusionary or offensive
<b>Employee Engagement</b>	Is a model employee in exhibiting behaviors of mutual respect, cooperation, professionalism and fairness. Actively promotes a positive work environment.	Is proactive in demonstrating high standards of mutual respect, cooperation, professionalism and fairness.	Builds productive rapport with employees at all levels within and outside the department. Treats others with fairness, dignity and respect.	Occasionally exhibits behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others	Exhibits behaviors of disrespect and/or a lack of professionalism and fairness.



# Calibration Review

- Second-level supervisors and Unit Heads are expected to promote consistent ratings based on ANR Performance Standards
- HR reviews appraisals for employees with a PROPOSED OVERALL RATING of “Exceptional”, “Does Not Meet” or “Partially Meets Expectations”
  - In some cases, HR may ask supervisors for clarification and direct that performance ratings change to be consistent with division-wide standards

# Exceptional Performance



# Practical Tips for Employees

- Keep an eye out for an email notification that your performance document has been created
  - Follow up with supervisor so he/ she knows that you are now working on your self-evaluation
- Review goals and expectations in your previous performance appraisal
- Look back over your notes, emails, to do lists, meetings you held or attended
- Think about how your role fits into the bigger picture (relate individual work to unit goals)
- Describe how you make a difference
- Review ANR Performance Standards
- Review training sites for professional development opportunities (UC Learning Center, LinkedIn learning)
- Keep your self assessment brief and use bullet points
- Think about how you receive feedback
  - Listen to understand
  - Consider requesting time to follow-up and develop a plan

# UCPath ePerformance System Supervisor's Role

# Confirming Reports To Info in UCPATH

Supervisors, log in: [UCPath.universityofcalifornia.edu](https://UCPath.universityofcalifornia.edu)

For more info about your direct reports, go to: Manager Actions > View Employee Information

The screenshot displays the UCPATH interface for a supervisor named Darlene Dolan. On the left, a navigation menu includes 'Dashboard', 'Employee Actions', 'Manager Actions', 'Forms Library', 'Quicklinks', and 'Help / FAQ'. The main content area is titled 'Direct Reports' and lists several employees: Charleen Garcia Jimenez, Harley Goggins, Honglin Fraysse, Kirk Han, Mike Mccahon, Steven Clark, Todd Mbatha, and Veronica Smith. A 'View All' link is also present. The right-hand side of the interface shows the 'VIEW EMPLOYEE PERSONAL INFORMATION' page, which includes a search filter for '10/04/2017' and a 'FIND EMPLOYEE' button. Below this, a list of 'Darlene Dolan's employees' is shown, including two 'Empty Position' entries and three active employees: Kirk Han, Mike Mccahon, and another Kirk Han. Each employee entry includes their name, job ID, position, and a 'SELECT' button. The top of the page features the UCPATH logo and a 'Log out' button.

## Correcting *Reports To* Info in UCPath

- If the “Reports To” is incorrect, submit a Data Changes Request form at [wfa.ucanr.edu](http://wfa.ucanr.edu). (Issues? Email [support@ucanr.edu](mailto:support@ucanr.edu))
- If several employees under same supervisor are affected, attach a spreadsheet. Complete the form for one employee and in the justification, explain the attachment.
- If the previous supervisor is no longer at UCANR, do not list them in the form; just note it in the justification section.
- Open a Zendesk ticket ([humanresources@ucanr.edu](mailto:humanresources@ucanr.edu)) with the Task ID number and in the subject line, note that it is a Supervisor Change (cc [pglass@ucanr.edu](mailto:pglass@ucanr.edu)).
- Effective Date is the current date.
- If the manager will be out on an extended leave.

# Employee Annual Performance Notification



 Reply  Reply All  Forward  IM



ucpath-notifications@universityofcalifornia.edu

ANR Annual Performance Docs documents have been created


To  Patricia Glass

 Follow up. 

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This automatic notification is to alert you that ANR Annual Performance Docs document have been created for the period beginning 04/01/2023 and ending 03/31/2024.

Document was successfully created for the following employee:

Patricia Glass ()

You may select this link to access the document:

[https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=121094&EP\\_REVIEWER\\_ID=10205449&EP\\_ROLE=E&EP\\_USER\\_ROLE=E&TRANS\\_NAME=BASELINE-CREATE](https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=121094&EP_REVIEWER_ID=10205449&EP_ROLE=E&EP_USER_ROLE=E&TRANS_NAME=BASELINE-CREATE)

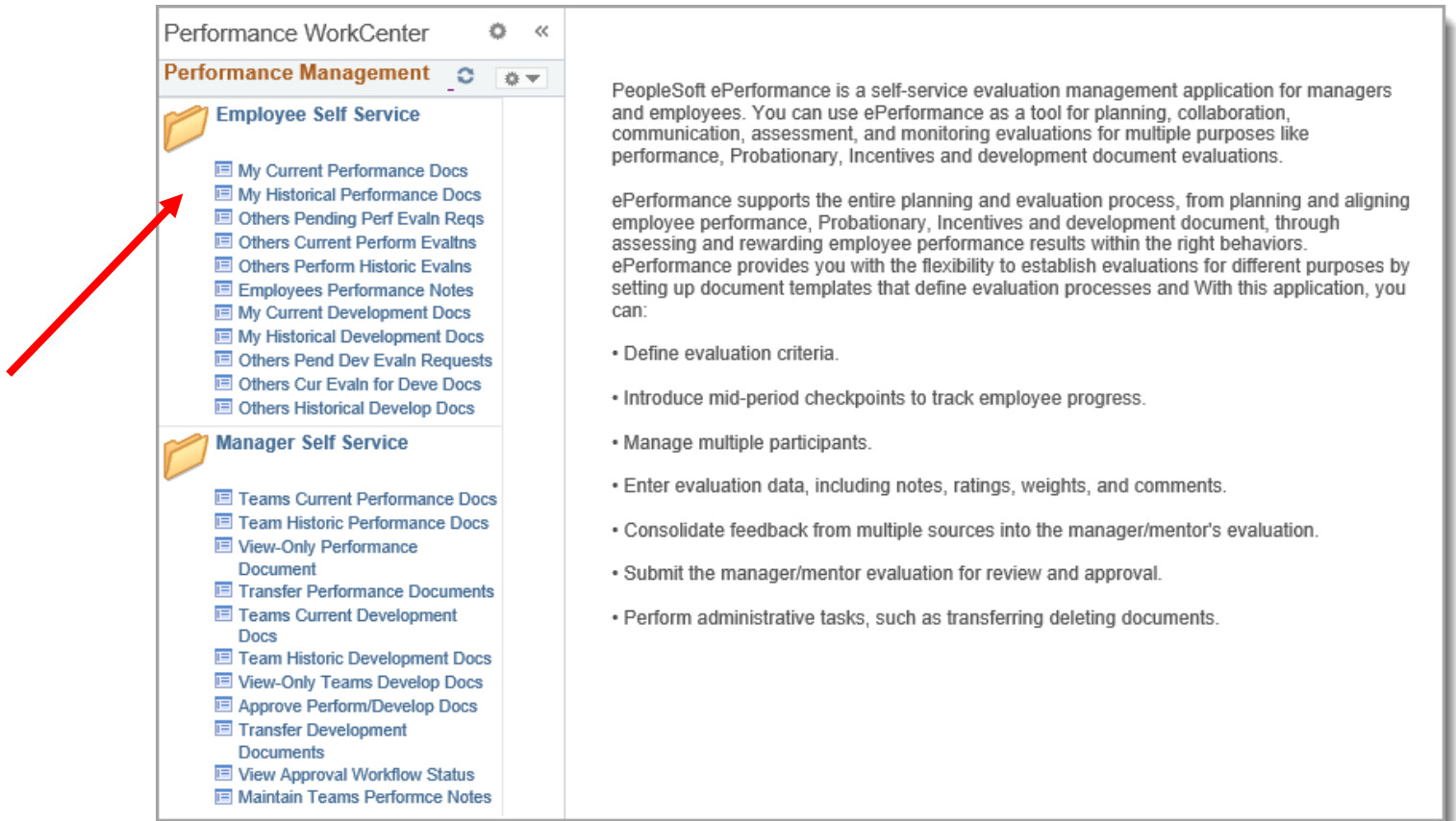
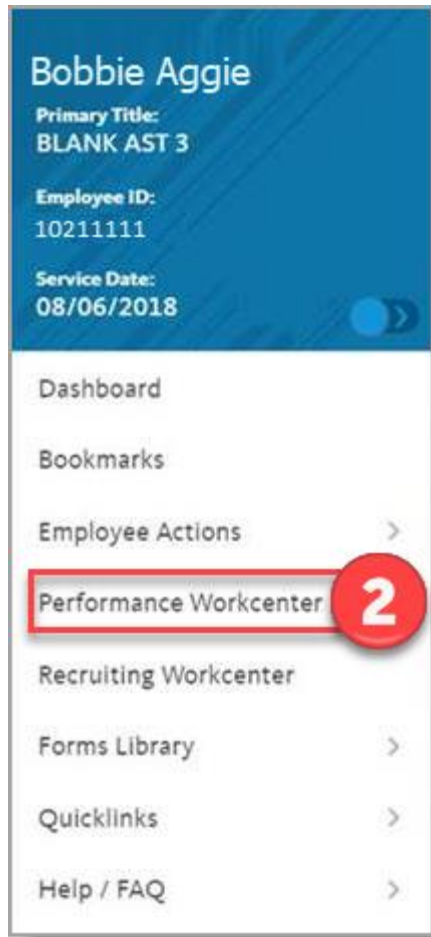
(Please do not respond to this automatic notification.)

Access by email link above or go directly to UCPath.

# Accessing Directly in UCPath Online



## 2. Click on Performance WorkCenter





# Accessing Directly in UCPATH Online

1. Navigate to [ucpath.universityofcalifornia.edu](http://ucpath.universityofcalifornia.edu)
2. Click on Performance WorkCenter
3. Employees: Click on **My Current Performance Docs**

The screenshot displays the Performance WorkCenter interface. On the left, the 'Employee Self Service' menu is visible, with 'My Current Performance Docs' highlighted by a red box and a red circle containing the number '3'. A red arrow points from this menu item to the 'Current Performance Documents' page. The main content area shows the 'Current Performance Documents' page for user Bobbie Aggie, with a red box around the text 'Listed are your current performance documents.' Below this is a table of performance documents.

Employee ID	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Due Date	Manager
581	<a href="#">Annual Performance Documents</a>	Evaluation in Progress	RVCMP	01/01/2018	01/09/2018	INFO SYS ANL 3	01/09/2018	Shi Bow

# Employee's Summary of Accomplishments

Self-Evaluation - Update and Complete

 Long Format |  Calculate All Ratings

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | Comments


▼ Section 1 - Accomplishments

▼ Expand | ► Collapse

## ▼ Summary of Accomplishments

**Description :** Use this space to describe progress and achievements in relation to pre-established organizational or unit goals and/or performance expectations. Include goals documented in the prior year's performance appraisal (if any), as well as new goals added during the year.

Employee Comments



A rich text editor toolbar with various icons for text formatting and editing. The icons include undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, text color, background color, and a table icon. Below the toolbar is a large empty text area for entering comments.

Created By Template

03/07/2022 3:16PM

## Attachments

No Attachments have been added to this document

 Add Attachment

# Core Competencies

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

 Long Format |  Calculate All Ratings

Accomplishments | **Core Competencies** | Leadership Skills | Highlights | Overall Rating | Comments

## ▼ Section 2 - Core Competencies

▼ Expand | ► Collapse

### ▼ Communication

**Description** : Shares and receives information using clear oral, written and interpersonal communication skills.

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Employee Rating

0.00 

Created By Template

03/06/2020 11:21AM

### ▼ Diversity and Inclusion

**Description** : Models and promotes the University of California Principles of Community and complies with UC policies on Diversity and Non Discrimination.

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Employee Rating

0.00 

Created By Template

03/06/2020 11:21AM

### ▼ Employee Engagement

**Description** : Demonstrates commitment to the job, colleagues, the University and its mission by acting in ways that further the accomplishment of its goals.

# Core Competencies

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

 Long Format |  Calculate All Ratings

Accomplishments | Core Competencies | **Leadership Skills** | Highlights | Overall Rating | Comments

## ▼ Section 3 - People Management

▼ Expand | ▶ Collapse

### ▼ Resource Management

**Description** : \*Required for Supervisors Only\* Demonstrates integrity, accountability and efficient stewardship of university resources in a manner consistent with the UC Standards of Ethical conduct and other policies.

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Employee Rating 0.00 

Created By: Template

03/06/2020 11:21AM

### ▼ People Management

**Description** : \*Required for Supervisors Only\* Leads and engages people to maximize organizational and individual performance through alignment with the University mission and attainment of strategic and operational goals.

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Employee Rating 0.00 

Created By: Template

03/06/2020 11:21AM

# Highlights

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

Long Format | Calculate All Ratings

Accomplishments | Core Competencies | Leadership Skills | **Highlights** | Overall Rating | Comments

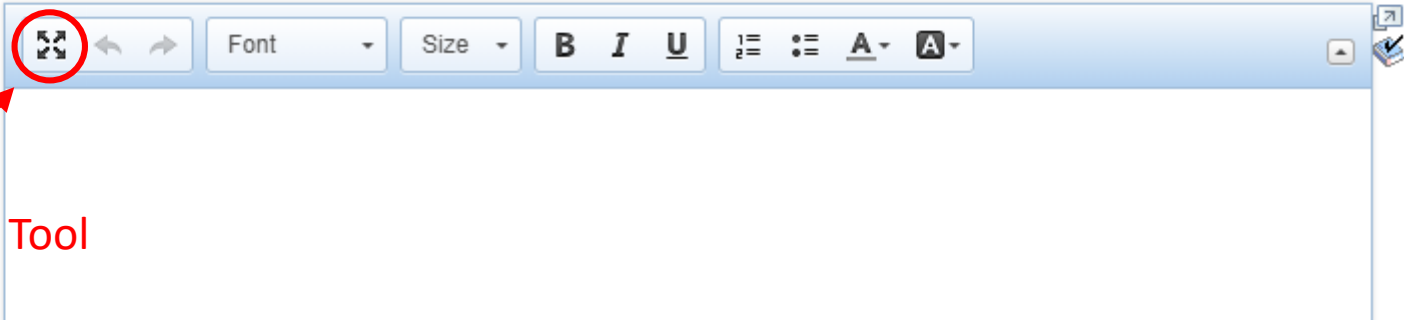
## Section 4 - Strengths

Expand | Collapse

### Strengths

Description : Summarize the employee's key strengths, describe two or three core competencies that represent particular strengths.

Employee Comments



A rich text editor interface for the Strengths section. It features a toolbar with various icons: a square with four arrows pointing outwards (highlighted with a red circle and a red arrow), left and right arrow icons, a 'Font' dropdown menu, a 'Size' dropdown menu, and buttons for bold (B), italic (I), and underline (U). There are also icons for bulleted and numbered lists, and two 'A' icons with color selection arrows. On the right side of the toolbar, there are icons for undo, redo, and a checkmark. The main text area below the toolbar is currently empty.

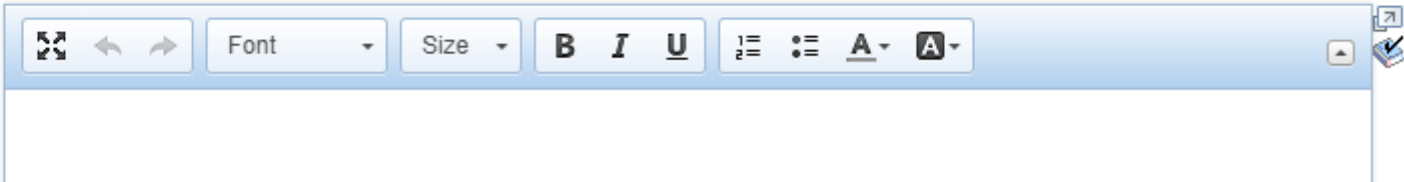
Created By Template

03/06/2020 11:21AM

### Areas for Development

Description : Highlight one or two areas for further development.

Employee Comments



A rich text editor interface for the Areas for Development section. It features a toolbar with various icons: a square with four arrows pointing outwards, left and right arrow icons, a 'Font' dropdown menu, a 'Size' dropdown menu, and buttons for bold (B), italic (I), and underline (U). There are also icons for bulleted and numbered lists, and two 'A' icons with color selection arrows. On the right side of the toolbar, there are icons for undo, redo, and a checkmark. The main text area below the toolbar is currently empty.

# Overall Summary

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

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

Print | Notify

Long Format | Calculate All Ratings

Accomplishments | Core Competencies | Leadership Skills | Highlights | **Overall Rating** | Comments

## ▼ Section 5 - Overall Summary

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Employee Rating

0.00

# Employee Comments

Long Format | Calculate All Ratings

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | **Comments**

## ▼ Section 6 - Employee Comments

Employee Comments

Font  Size  **B** *I* U A

# Best Practices

- Save the document throughout so you don't lose your work
- Work in a Word document first and copy and paste your text boxes
  - Accomplishments
  - Strengths
  - Areas of Improvement
  - Summary
- Mandatory items: system requires radio button completion, but finishing the text boxes is just as important

# Confirmation and Document Completed

The screenshot shows the Oracle HR system interface. At the top, there are navigation links for 'Home', 'Worklist', 'Performance Trace', and 'Add to Favorites'. Below the Oracle logo is a search bar with 'All' and 'Advanced Search' options. The main content area is titled 'Complete Evaluation' and contains the following text: 'You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.' Below this text are two buttons: 'Confirm' and 'Cancel'. On the left side, there is a sidebar with 'Performance Process' and 'Steps and Tasks' sections. The 'Steps and Tasks' section lists 'Complete Self Evaluation' (Due Date: 03/05/2020) and 'Review Manager Evaluation' (Due Date: 04/19/2020). The 'Performance Process' section shows 'ANR Annual Performance Docs' for the period 04/01/2019 to 03/31/2020, with an 'Overview' link.

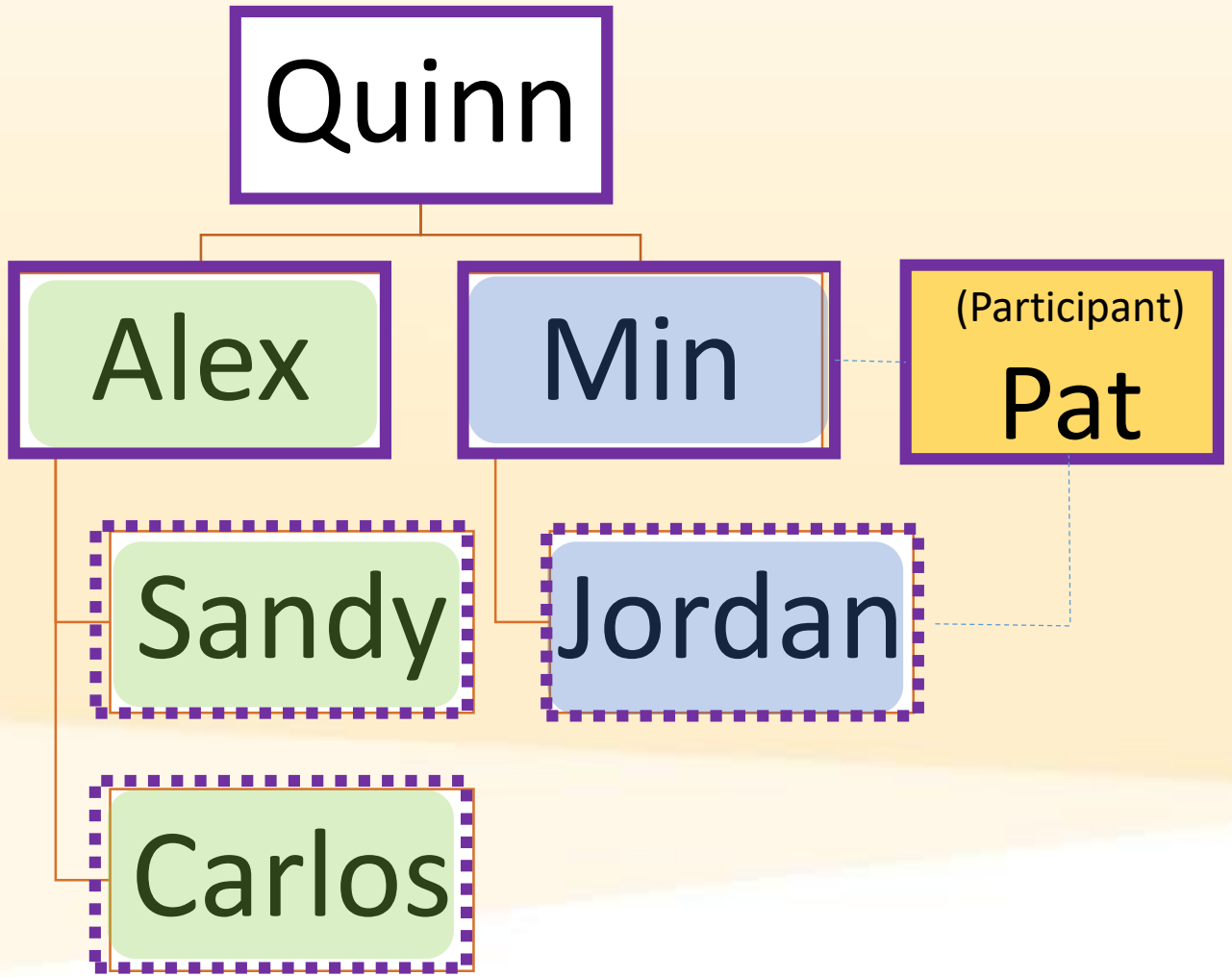
This screenshot shows the same Oracle HR system interface after the evaluation is completed. A message box at the top reads: 'To see favorites here, select ☆ then ☆, and drag to the Favorites Bar folder. Or import from another browser. Import favorites'. The main content area now displays a green checkmark icon and the text: 'You have successfully completed your evaluation.' Below this message is a link labeled 'Return to Current Documents'. The sidebar on the left remains the same, showing the 'Complete Self Evaluation' task as completed.



# Who Can View or Approve Evaluations?

- There are two levels of approval in ePerformance: the employee's supervisor who is providing their evaluation and the next level up, who is generally the supervisor's supervisor.
- Supervisors can view evaluations for staff of any supervisors who report to them.
- HR Employee & Labor Relations & Management
- Supervisors can request input from another "participant" (i.e. secondary supervisor); however, the participant cannot view the employee's evaluation or what the primary supervisor has written

# Who Creates, Views or Approves Evaluations?



- ▶ Each of these staff employees completes a self-evaluation

- ▶ If needed, Alex meets with Sandy and Carlos for clarification on their self-evaluations
- ▶ Alex completes evaluations for Sandy and Carlos

- ▶ If needed, Min meets with Jordan for clarification
- ▶ Min reviews input by Pat and may incorporate
- ▶ Min completes an evaluation for Jordan

- ▶ If needed, Quinn meets with Alex & Min for clarification on their self-evaluations
- ▶ Quinn completes their evaluations

- ▶ Quinn provides secondary approval for Sandy, Carlos, & Jordan

# Employee Annual Performance Notification

Subject: ANR Annual Performance Docs Document has Been Created

This automatic notification is to alert you that the HR Department has created ANR Annual Performance Docs document for the period beginning 04/01/2021 and ending 03/31/2022.

ANR Annual Performance Docs documents were successfully created for the following employees:



You may select this link to access the documents for your team:

[https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE\\_MANAGER.EP\\_CURRENT\\_MY\\_PRF.GBL](https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_CURRENT_MY_PRF.GBL)

(Please do not respond to this automatic notification.)

Access by email link above or go directly to UCPath.

# Supervisor Notification

Subject: [REDACTED] has completed self evaluation ANR Annual Performance Docs

[REDACTED] has completed the self-evaluation ANR Annual Performance Docs for the period ending 03/31/2020.

Please click the link below to access the document [https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?](https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?)

[EP\\_APPRAISAL\\_ID=28443&EP\\_REVIEWER\\_ID=10205527&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=EMPDOC-COMPLETE](https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=28443&EP_REVIEWER_ID=10205527&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EMPDOC-COMPLETE)

(Please do not respond to this automatic notification.)

# Supervisor Access Directly in UCPATH Online

1. Navigate to [ucpath.universityofcalifornia.edu](http://ucpath.universityofcalifornia.edu)
2. Click on Performance WorkCenter
3. Employees: Click on My Current Performance Docs
4. Supervisors: Click on **Teams Current Performance Docs**

Performance WorkCenter

Performance Management

Employee Self Service

- My Current Performance Docs
- My Historical Performance Docs
- Others Pending Perf Evaln Reqs
- Others Current Perform Evaltns
- Others Perform Historic Evaltns
- 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

- 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

### 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 DVCMP Department

Filter Clear

**Performance Documents** Personalize | Find | First 1-2 of 2 Last

Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Action	Next Due Date
10233333	Alex Employee	UCD Health Prob Check Pt Eval	Evaluation in Progress	DVMED	08/01/2019	10/31/2019	INFO SYS ANL 3	Update and Submit	10/31/2019
10211111	Bobbie Aggie	UCD Health Staff Appraisal	Evaluation in Progress	DVMED	04/30/2019	04/30/2020	INFO SYS ANL 3	Update and Submit	06/14/2020

# Supervisor View of Performance WorkCenter

Performance WorkCenter > Document Selection

ORACLE

Home | Worklist | Performance Trace | Add to Favorites

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 Evaltns
- 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

- 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 DVCMP Department

Filter Clear

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Ne
10213196	Bobbie Aggie	UCD Campus Staff Appraisal	Evaluation in Progress	DVCMP	01/01/2019	12/31/2019	INSTRUCTIONAL DESIGNER 4	U

# Viewing Employee Self-Evaluation

ORACLE

All Search Advanced Search

Performance Process

Steps and Tasks

ANR Annual Performance Docs  
04/01/2019 - 03/31/2020 Overview

- Nominate Participants  
Due Date: 03/31/2020
- Review Participant Evaluations  
Due Date: 04/19/2020
- Review Self Evaluation  
Due Date: 03/05/2020
- Complete Manager Evaluation  
Due Date: 04/19/2020
  - Update and Submit
  - Pending Approval
  - Share with Employee
  - Request Acknowledgement
  - Pending Acknowledgement
  - Complete

ANR Annual Performance Docs  
Start Document

Select the Start button to begin the evaluation process.  
Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings | Cancel Evaluation

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | Comments

Section 1 - Accomplishments

Expand | Collapse

Summary of Accomplishments

Description : Use this space to describe progress and achievements in relation to pre-established organizational or unit goals and/or performance expectations. Include goals documented in the prior year's performance appraisal (if any), as well as new goals added during the year.

Employee Comments

For the 2019-2020 period I have accomplished the goals set in my previous EPAR of leading the UC Path crossov of absence.

Manager Comments

Font Size B I U

Creating eLearning Courses as Requested.

Complete your assessment of the employee's accomplishments in this long-text field.

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	Save to Manager Evaluation
FAQs_2022.docx	Test Attachment	Employee and Manager	02/18/2022 2:28:59PM	Chona Gable	Save

Message

Attachment FAQs\_2022.docx successfully copied (4600,377)

File was successfully copied to the manager evaluation.  
Refresh the manager evaluation to see the file.

OK

# Core Competencies

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings | Cancel Evaluation

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | Comments

## Section 2 - Core Competencies

Expand | Collapse

**Communication**

Description : Shares and receives information using clear oral, written and interpersonal communication skills.

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

Manager Rating 0.00

Employee Rating 3 Meets Expectations

Created By Template 03/03/2020 12:33PM

See definitions of the ANR Performance Standards  
<https://ucanr.edu/sites/ANRSPU/files/238148.pdf>

## Diversity and Inclusion



# Highlights and Areas for Development

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings | Cancel Evaluation

Accomplishments | Core Competencies | Leadership Skills | **Highlights** | Overall Rating | Comments

▼ Section 4 - Strengths

▼ Expand | ► Collapse

▼ **Strengths**

**Description :** Summarize the employee's key strengths, describe two or three core competencies that represent particular strengths.

Manager Comments

Employee Comments

Great communication, team player, completes tasks quickly.

# Enter Overall Rating

 Long Format |  Calculate All Ratings |  Cancel Evaluation

Accomplishments | Core Competencies | Leadership Skills | Highlights | **Overall Rating** | Comments

## ▼ Section 5 - Overall Summary

1 Does Not Meet Expectations  2 Partially Meets Expectations  3 Meets Expectations  4 Exceeds Expectations  5 Exceptional Performance  6 Not Applicable

**Manager Rating** 0.00 

**Employee Rating** 3 Meets Expectations

## Attachments

No Attachments have been added to this document

 Add Attachment

## ▼ Audit History

Created By	Scott Leaf	03/03/2020 12:33:32PM
Last Modified By	Mary Vlandis	03/03/2020 12:59:15PM

# Submit Evaluation to HR

Performance Process

Performance Process ANR Annual Performance Docs [Return to Current Document](#) **Save** | **Submit for Approval**

Steps and Tasks **Manager Evaluation - Update and Submit** [Print](#) | [Notify](#) | [Export](#)

Priscilla Passionfruit

ANR Annual Performance Docs  
07/28/2023 - 09/30/2023 [Overview](#)

**Actions**

<b>Job Title</b>	FINANCIAL SVC BU M 1	<b>Manager</b>	Subway/sandwich/co
<b>Document Type</b>	ANR Annual Performance Docs	<b>Period</b>	07/28/2023 - 09/30/2023
<b>Template</b>	ANR Annual Eval - 2023	<b>Document ID</b>	224719

# Secondary and HR Approvals

- The supervisor submits evaluation to the Secondary Approver (the supervisor's supervisor) (in time for them to approve by 5/10)
- Secondary Approvers have ability to select “Approve” or “Deny” only
- When approved, evaluation routes to HR for calibration review
- Human Resources approves and releases evaluation to the supervisor
- The supervisor selects “share” evaluation with employee

# Supervisor Shares



Home | Worklist | Performance Trace | Add to Favorites

Return to View Performance Documents | [Share with Employee](#)

Print | Notify | Export

Favorites ▾ | Main Menu ▾

**ORACLE**

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Performance Process ⊙ <<

**Steps and Tasks** ↻ ⊙ ▾

Patricia Glass  
ANR Annual Performance Docs  
04/01/2019 - 03/31/2020 [Overview](#)

- Nominate Participants  
Due Date 03/31/2020
- Review Participant Evaluations  
Due Date 04/19/2020
- Review Self Evaluation  
Due Date 03/05/2020
- Review Manager Evaluation  
Due Date 04/19/2020  
[View](#)

**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](#)

# Reviewing Supervisor Input

ORACLE® All Search >> Advanced Search

Performance Process << ANR Annual Performance Docs Return


**Steps and Tasks** [Refresh] [Settings]

ANR Annual Performance Docs  
04/01/2019 - 03/31/2020 Overview

- Complete Self Evaluation  
Due Date 03/05/2020
- Review Manager Evaluation  
Due Date 04/19/2020
  - Review with Manager  
Acknowledge  
View

**Manager Evaluation - Review with Manager**

[Redacted Name]



Job Title HR GENERALIST 2  
Document Type ANR Annual Performance Docs  
Template Staff Annual Perf Eval - 2020  
Status Shared with Employee

**Employee Data**

Empl ID [Redacted]  
Department 205100 IMM OFFICE OF HR  
Location DAVIS2801 2801 2ND STREET  
Plan/Grade CT3 20  
Step 0

This document is available for your review. You should review this document with your manager.

Long Format

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overview

Section 1 - Accomplishments  
Expand | Collapse

# Reviewing Supervisor Input

Long Format | Change Due Date

Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | Comments

Section 1 - Accomplishments

Expand | Collapse

Summary of Accomplishments

Description : Use this space to describe progress and achievements in relation to pre-established organizational or unit goals and/or performance expectations. Include goals documented in the prior year's performance appraisal (if any), as well as new goals added during the year.

Employee Comments

Listing of progress and achievements in relation to pre-established organizational or unit goals and/or performance expectations. Included are goals documented in the prior year's performance evaluation, as well as new goals added during the year.

Created By: Template      03/06/2020 11:21AM

Accomplishments Summary

Manager Comments

Excellent work so far in the cycle for meeting the established organizational goals.  
A pro at ePerformance.

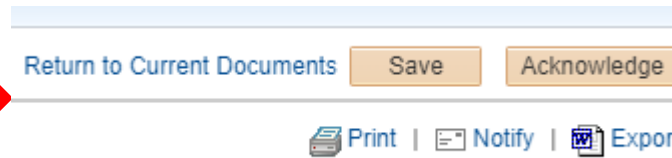
# The Rest of the Process

- The supervisor and employee meet to discuss the evaluation details
- The employee may enter final comments
- The employee selects “acknowledge” and the process is complete

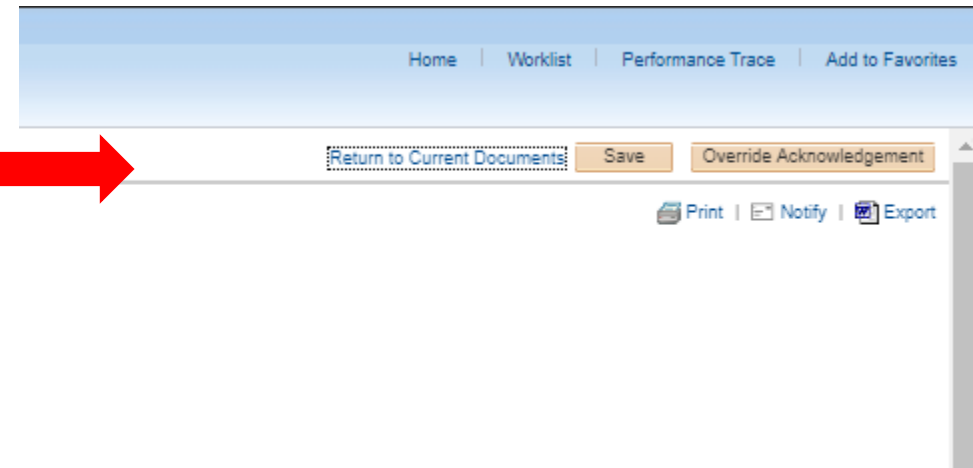


# Screenshots of the Rest of the Process

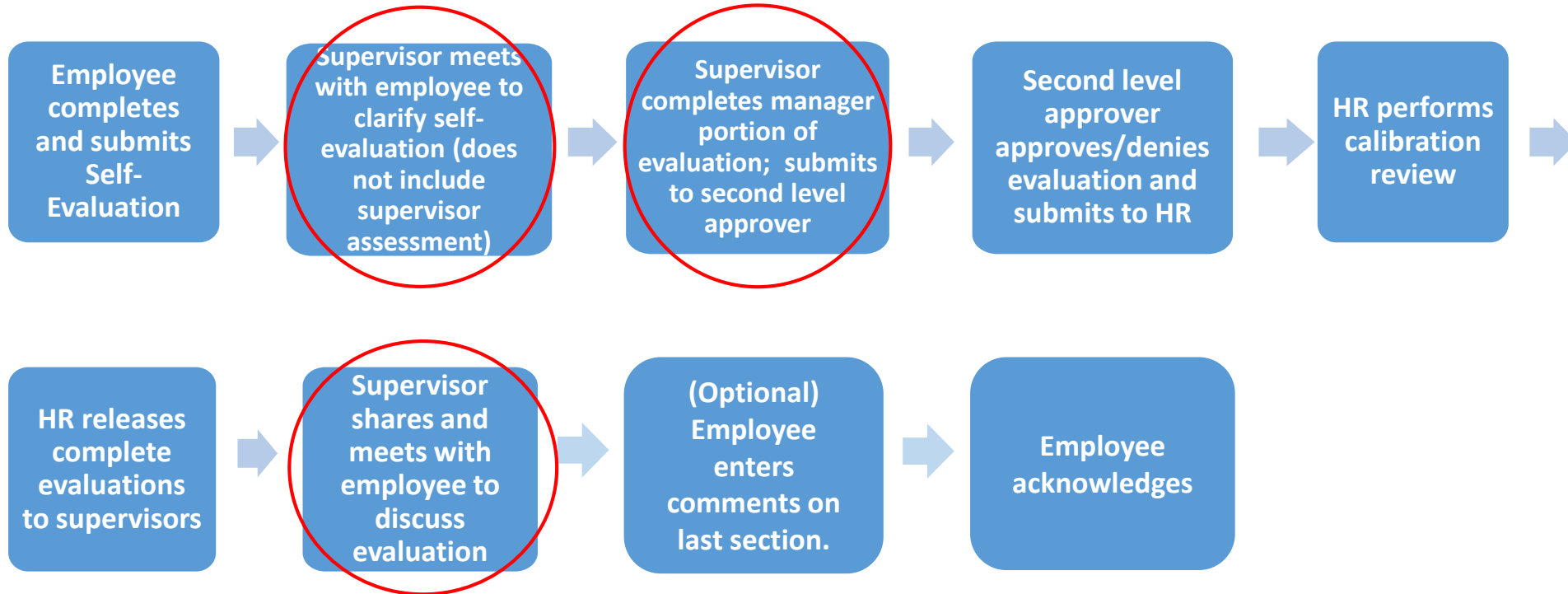
Employee Action



If Employee does not act, Supervisor Action



# ePerformance Workflow



# Resources

[https://ucanr.edu/sites/ANRSPU/Supervisor\\_Resources/Performance\\_Management/](https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Performance_Management/)

## **Resources**

[Evaluation Guidelines and FAQs 2023 2.0](#)

[ANR Performance Standards](#)

[Performance Elements mapped to UC Core Competencies](#)

[Career Planning Tools](#)

[People Management Resources](#)

[SMART Goals Worksheet](#)

[SMART Goals: Worksheet Example](#)

[SMART Goals Examples](#)

[SMART Goals: A How to Guide](#)

[Additional Performance Management Resources at UCnet](#)

# UC People Management Series

We encourage all supervisors who are responsible for completing a performance review take two online people management courses:

**UC Performance Management: Setting Expectations and Individual Performance Goals**

(DAC-HRUCPM02-PMC-DAAS; Estimated Duration: 1 hour)

**UC Performance Management: Giving & Receiving Feedback**

(DAC-HRUCPM03-PMC; Estimated Duration: 45 minutes)

Available on-demand through the UC Learning Center:

<http://lms.ucdavis.edu>

If you have completed these courses in the past, you may want to review again as a refresher.

# Questions?

For future inquiries regarding the evaluation process, please contact Ian Smith at [ijsmith@ucanr.edu](mailto:ijsmith@ucanr.edu). If you have system-related questions, please contact Patricia Glass at [pglass@ucanr.edu](mailto:pglass@ucanr.edu).