

UCPath ePerformance

Annual Staff Performance Appraisal Process (2021) Supervisor Focus

Presented by ANR Human Resources
March 2021

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: Monday, March 15, 2-3pm

Supervisor Role: Wednesday, March 17, 3-4:30pm

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, 2020 through March 31, 2021
- When does the process take place?
 - Annual review process runs from March 2, 2021 through June 30, 2021
- 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 +)

Oakland based ANR employees refer to Office of the President process and timeline

This process does not apply to the following:

Academics	Limited Term Employees
Student Employees	Per Diem Employees
Rehired Retirees	Contract Employees (<i>less than 6 month appt.</i>)
Temp Employment Service	<i>Probationary employees as of March 31, 2021</i> (midpt. review will suffice)

How are annual evaluations impacted by the COVID-19 pandemic?

- Annual reviews were not required for April 2019 – March 2020 review period
 - UC-wide Presidential directive
- Supervisors and employees are asked to acknowledge the negative impact of the pandemic when reviewing accomplishments during the last year and setting goals for the coming year
- Supervisors can use the opportunity to ask staff if they are encountering obstacles to getting their work done, and to explore potential solutions together.

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 3rd party
- **Support** managers and employees in understanding performance management and differentiated pay for relative performance
- **Provide** tools, training, and coaching.

Annual Evaluation Timeline

Mar 1-Mar 19	<ul style="list-style-type: none">Employee completes the ePerformance self-evaluation
Mar 22-May 7	<ul style="list-style-type: none">Supervisor meets with employee to review the ePerformance self-evaluationSupervisor completes the manager evaluation fieldsSupervisor routes ePerformance evaluation to second level approverSecond level approver reviews and approves evaluation
May 7	<ul style="list-style-type: none">Deadline for ePerformance evaluations with proposed overall ratings
May 8-May 31	<ul style="list-style-type: none">Calibration committee reviews proposed ratings for consistency and confirms final ratings
By June 18	<ul style="list-style-type: none">HR communicates to unit directors/ dept. heads that calibration is completeHR approves the final evaluations in ePerformance
By June 30	<ul style="list-style-type: none">Supervisors share final results with employeesEmployees acknowledge receipt

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.

ANR Performance Standards

- Common descriptions for each job competency in ePerformance
- Changes in 2021:
 - Re-ordered to match the ePerformance system
 - Expanded examples for Diversity and Inclusion competency
- Used as the basis for performance discussions and ratings

http://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Performance_Management/

ANR Performance Standards					
Competency	Exceptional	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Improvement Needed
Communication	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
Diversity and Inclusion	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
Employee Engagement	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

- Verify *Reports To* information is correct in UCPath
- Supervisors

➔ UCPath Online > Dashboard

– OR –

➔ UCPath Online > Manager Actions > View Employee Information

Submit a Zendesk ticket to the HR Help Center if the “Reports To” information needs to be corrected.
humanresources@ucanr.edu

Confirming *Reports To* Info in UCPATH

➤ Supervisors

➔ UCPATH Online > Dashboard

– OR –

➔ UCPATH Online > Manager Actions > View Employee Information

The image displays three sequential screenshots of the UCPATH system interface, illustrating the navigation path for supervisors to view employee information.

Screenshot 1 (Left): Shows the user's profile for Darlene Dolan (Primary Title: ACQUISITIONS MGR 1, Employee ID: 10000452, Service Date: 08/01/2013) and the main navigation menu. The 'Manager Actions' option is highlighted.

Screenshot 2 (Middle): Shows the 'Manager Actions' page with the 'View Employee Information' option highlighted. The 'Direct Reports' section lists employees: Charleen Garcia Jimenez, Harley Goggins, Honglin Fraysse, Kirk Han, Mike Mccahon, Steven Clark, Todd Mbatha, and Veronica Smith.

Screenshot 3 (Right): Shows the 'VIEW EMPLOYEE PERSONAL INFORMATION' page. It includes a search filter for '10/04/2017' and a 'REFRESH EMPLOYEES' button. Below, it displays 'Darlene Dolan's employees' with details for 'Empty Position (40001724)', 'Empty Position (40000824)', 'Kirk Han' (Empl ID: 10002415, Job: 0, Empl Status: Active, HR Status: Active, Position: 40000664), and 'Mike Mccahon' (Empl ID: 10000301, Job: 0).

Employee Annual Performance Notification

This automatic notification is to alert you that ANR Annual Performance Docs document have been created for the period beginning 04/01/2020 and ending 03/31/2021. This document should be completed and approved by 03/19/2021.

Document was successfully created for the following employee:



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=82897&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=82897&EP_REVIEWER_ID=10205449&EP_ROLE=E&EP_USER_ROLE=E&TRANS_NAME=BASELINE-CREATE)

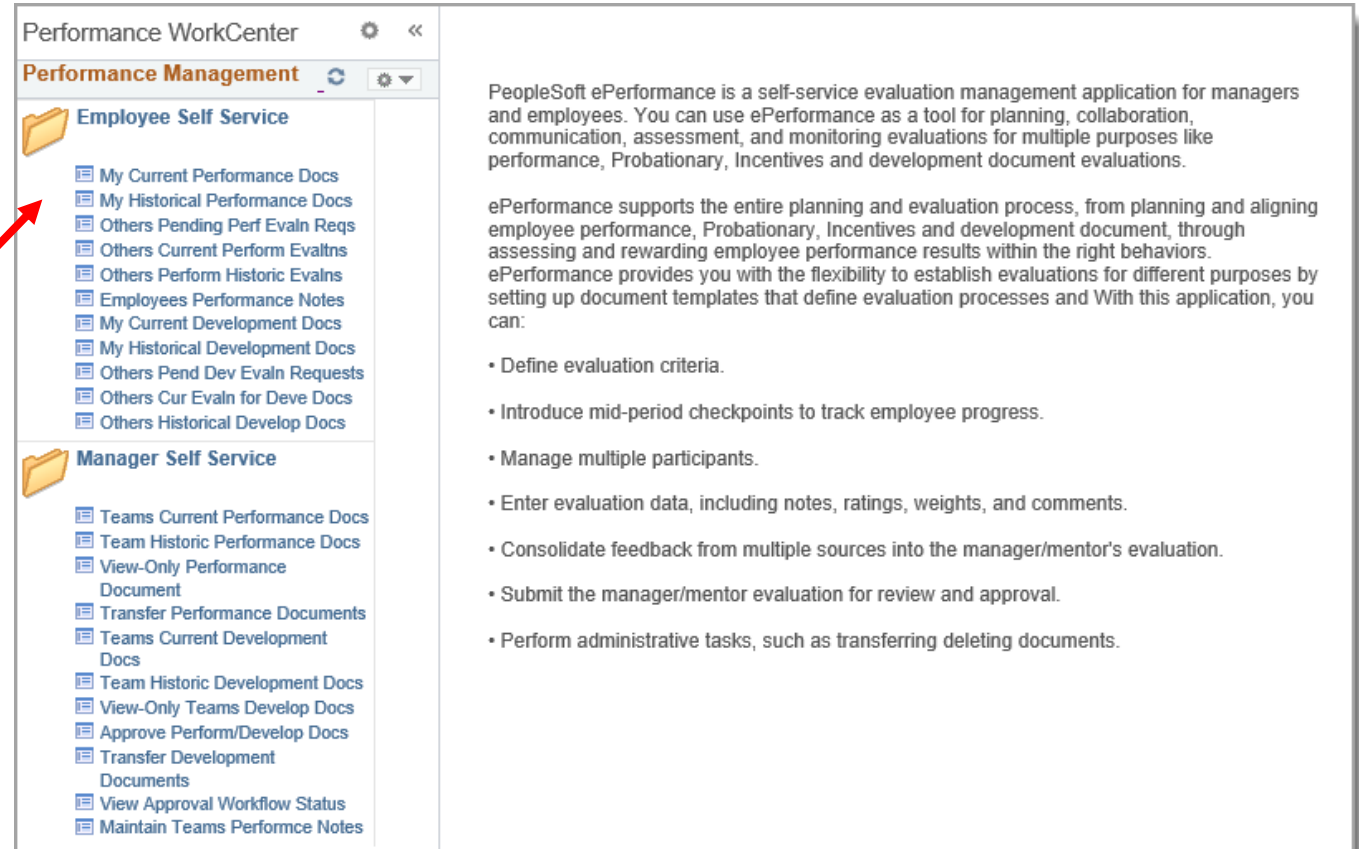
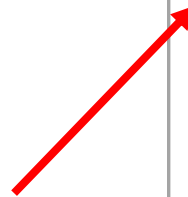
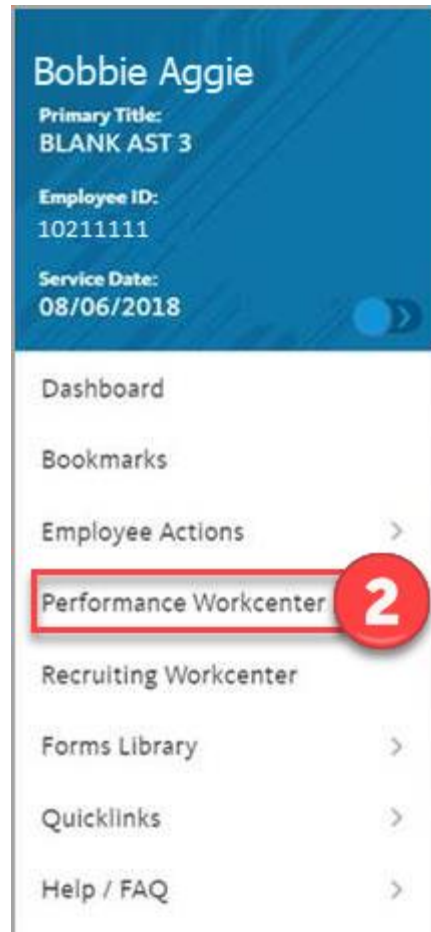
(Please do not respond to this automatic notification.)

Access by email link above or go directly to UCPath.

Accessing Directly in UCPath Online



2. Click on Performance WorkCenter



This will open a new tab

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

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

- Define evaluation criteria.
- Introduce mid-period checkpoints to track employee progress.
- Manage multiple participants.
- Enter evaluation data, including notes, ratings, weights, and comments.
- Consolidate feedback from multiple sources into the manager/mentor's evaluation.
- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring deleting documents.

Accessing Directly in UCPATH Online

1. Navigate to 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' sidebar contains a list of links, with 'My Current Performance Docs' highlighted by a red box and a red circle with the number '3'. A red arrow points from this link to the 'Current Performance Documents' section on the right. The main content area shows the 'Current Performance Documents' page for user 'Bobbie Aggie'. A red box highlights the text 'Listed are your current performance documents.' above a table of performance documents. The table has columns for Employee ID, Document Type, Document Status, Business Unit, Period Begin, Period End, Job Title, Next Due Date, and Manager. The first row shows an 'Annual Performance Documents' entry for Employee ID 581, with a status of 'Evaluation in Progress' and a due date of 01/09/2018.

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

Employee's Summary of Accomplishments

ANR Annual Performance Docs

Self-Evaluation - Update and Complete



Job Title
Document Type ANR Annual Performance Docs
Template Staff Annual Perf Eval - 2020
Status Evaluation in Progress

Manager
Period 04/01/2019 - 03/31/2020
Document ID 29000
Due Date 03/05/2020

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

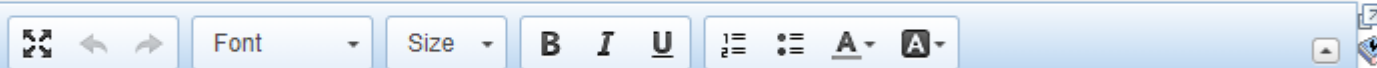
▼ Section 1 - Accomplishments

▼ 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



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

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

Expansion Tool












Created By Template

03/06/2020 11:21AM

▼ Areas for Development

Description : Highlight one or two areas for further development.

Employee Comments

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

Overall Summary

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

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.

[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

Performance Process

Complete Evaluation

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.

[Confirm](#) [Cancel](#)

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

To see favorites here, select ☆ then ☆, and drag to the Favorites Bar folder. Or import from another browser. [Import favorites](#)

Performance Process

ANR Annual Performance Docs [Return to Current Documents](#)

Confirmation - Document Completed

✔ You have successfully completed your evaluation.

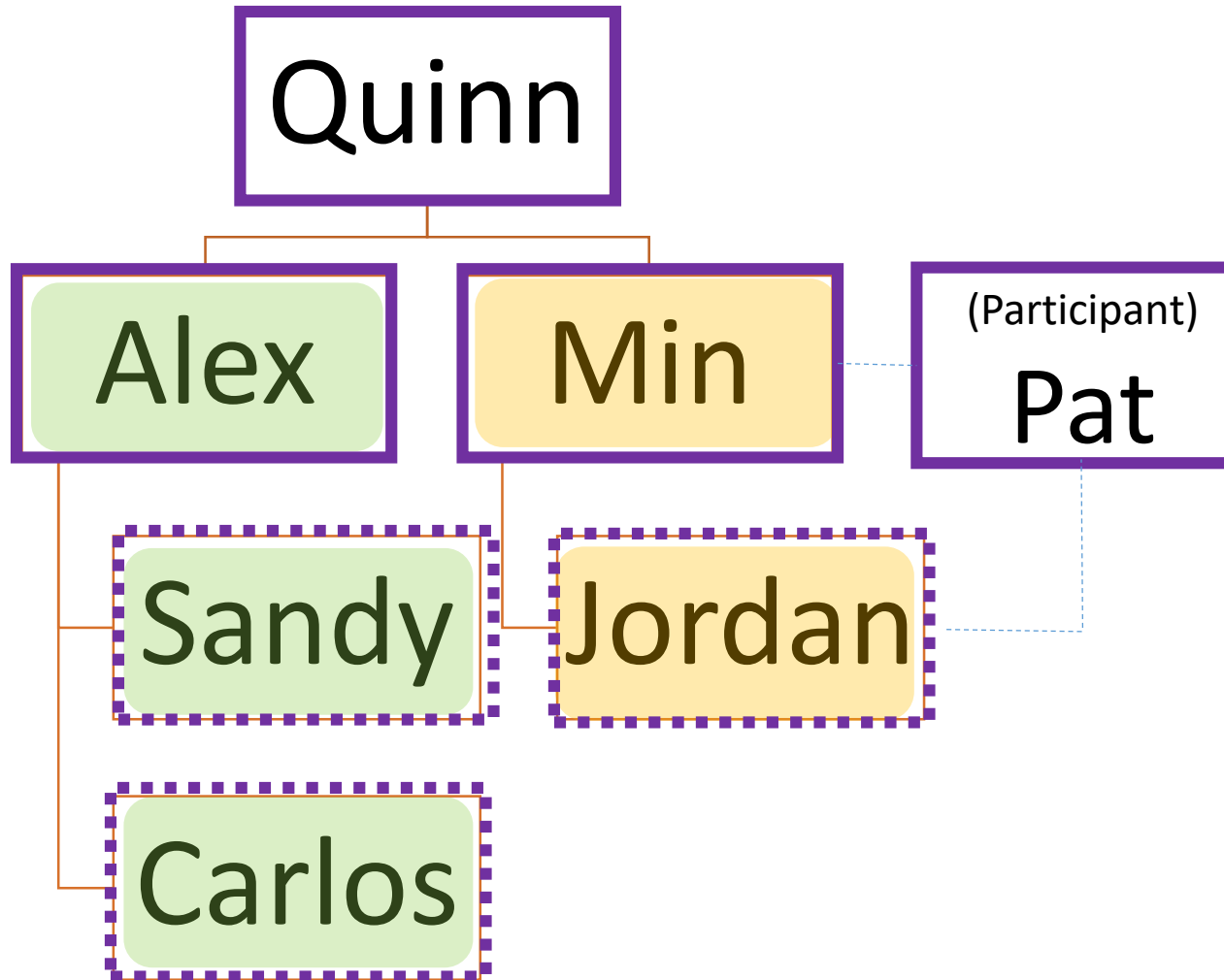
ANR Annual Performance Docs
04/01/2019 - 03/31/2020 [Overview](#)

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

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 employees create their own self-evaluation

▶ Alex meets with Sandy and Carlos and then completes their evaluation

▶ Min meets with Jordan and then completes that evaluation

▶ Quinn meets with Alex & Min and completes their evaluations

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

Supervisor Annual Performance Notification

-----Original Message-----

From: ucpath-notifications@universityofcalifornia.edu <ucpath-notifications@universityofcalifornia.edu>

Sent: Friday, February 26, 2021 9:21 AM

To: 

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 04/01/2020 and ending 03/31/2021. Documents should be completed and approved by 05/07/2021

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

(Please do not respond to this automatic notification.)

Supervisor Notification

-----Original Message-----

From: ucpath-notifications@universityofcalifornia.edu <ucpath-notifications@universityofcalifornia.edu>

Sent: Tuesday, March 3, 2020 4:07 PM

To: [REDACTED]@ucanr.edu>

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)

[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
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 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

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

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

Favorites ▾Main Menu ▾> Performance Workcenter> Document Selection

ORACLE

All ▾Search>>Advanced Search🔍Last Search Results

Home | Worklist | Performance Trace | Add to Favorites

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

New Window | Help

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 -

Department Set ID DVCMP

Job Code

Department

FilterClear

Performance Documents

Employee ID	Name	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	No
10213196	Bobbie Aggie	UCD Campus Staff Appraisal	Evaluation in Progress	DVCMP	01/01/2019	12/31/2019	INSTRUCTIONAL DESIGNER 4	U

UNIVERSITY OF CALIFORNIA
Agriculture and Natural Resources

Viewing Employee Self-Evaluation

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 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.

Select the Start button to be:

[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 year of absence.

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

Manager Comments

Creating eLearning Courses as Requested.

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

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

▼ Diversity and Inclusion

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

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

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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

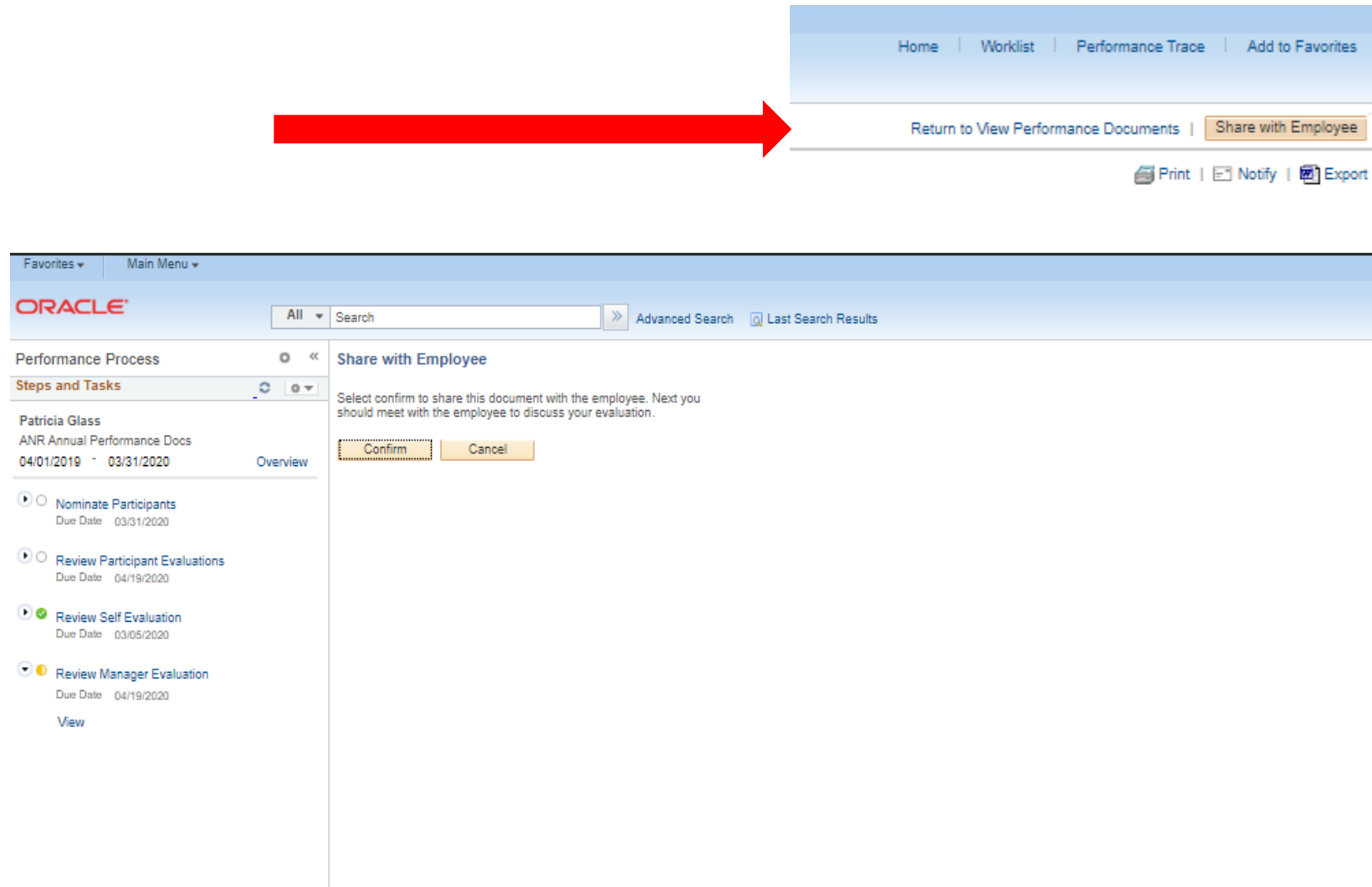
03/03/2020 12:59:15PM

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Agriculture and Natural Resources

Secondary and HR Approvals

- The supervisor submits evaluation to the Secondary Approver (generally the supervisor's supervisor) (Suggested due date 4/19)
- 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



The screenshot displays the Oracle HR system interface. At the top, a navigation bar includes links for Home, Worklist, Performance Trace, and Add to Favorites. Below this, a red arrow points to a 'Share with Employee' button. The main content area shows the 'Performance Process' section with a list of tasks: Nominate Participants, Review Participant Evaluations, Review Self Evaluation, and Review Manager Evaluation. A dialog box titled 'Share with Employee' is open, prompting the user to confirm sharing the document with the employee. The dialog includes 'Confirm' and 'Cancel' buttons.

Home | Worklist | Performance Trace | Add to Favorites

Return to View Performance Documents | **Share with Employee**

Print | Notify | Export

Favorites ▾ Main Menu ▾

ORACLE® All Search Advanced Search Last Search Results

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 << <<

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](#)

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
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 comments and “save” evaluation
- The supervisor selects “request acknowledgement” from employee
- The employee selects “acknowledge”
- Supervisor finalizes process by selecting “complete”
(Confirmation will appear to ensure process has been finalized.)

Screenshots of the Rest of the Process

Oracle Performance Process sidebar. The 'Request Acknowledgement' step is highlighted in yellow. The sidebar shows a list of steps: Nominate Participants, Review Participant Evaluations, Review Self Evaluation, and Complete Manager Evaluation. The 'Request Acknowledgement' step is currently in progress, indicated by a yellow circle with an exclamation mark.

Supervisor Action



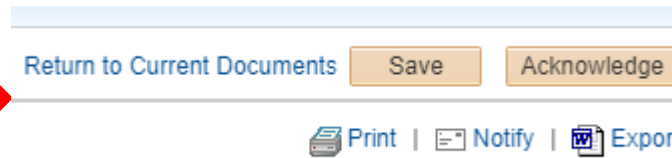
Oracle Performance Process top navigation bar. The 'Request Acknowledgement' button is highlighted. The navigation bar includes links for Home, Worklist, Performance Trace, and Add to Favorites. The 'Request Acknowledgement' button is located next to the 'Save' button.

Oracle Performance Process 'Request Acknowledgement' dialog box. The dialog box prompts the user to 'Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.' The 'Confirm' button is highlighted. The dialog box also includes a 'Cancel' button.

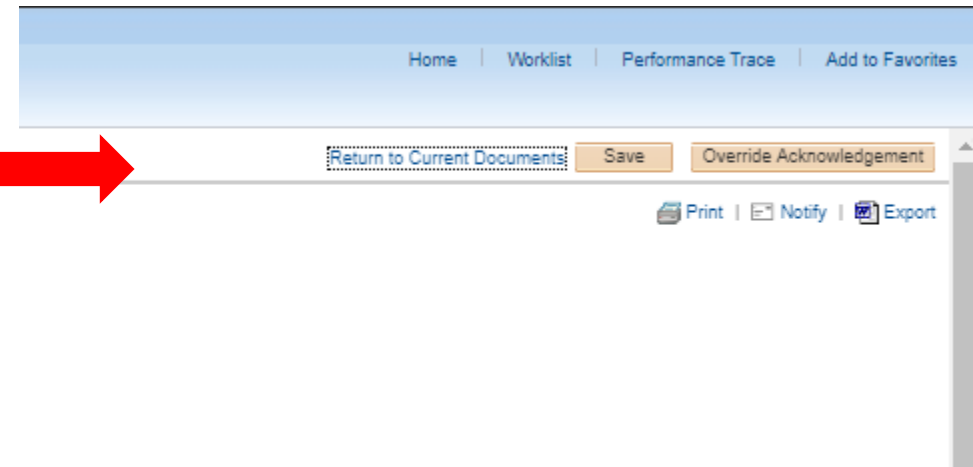
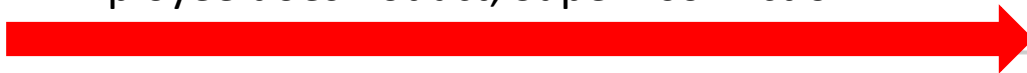
Oracle Performance Process 'Confirmation - Acknowledgement Requested' message. The message states: 'You have successfully requested that the employee acknowledge this document.' The 'Overview' link is highlighted. The message is displayed in a blue box with a green checkmark icon.

Screenshots of the Rest of the Process

Employee Action



If Employee does not act, Supervisor Action



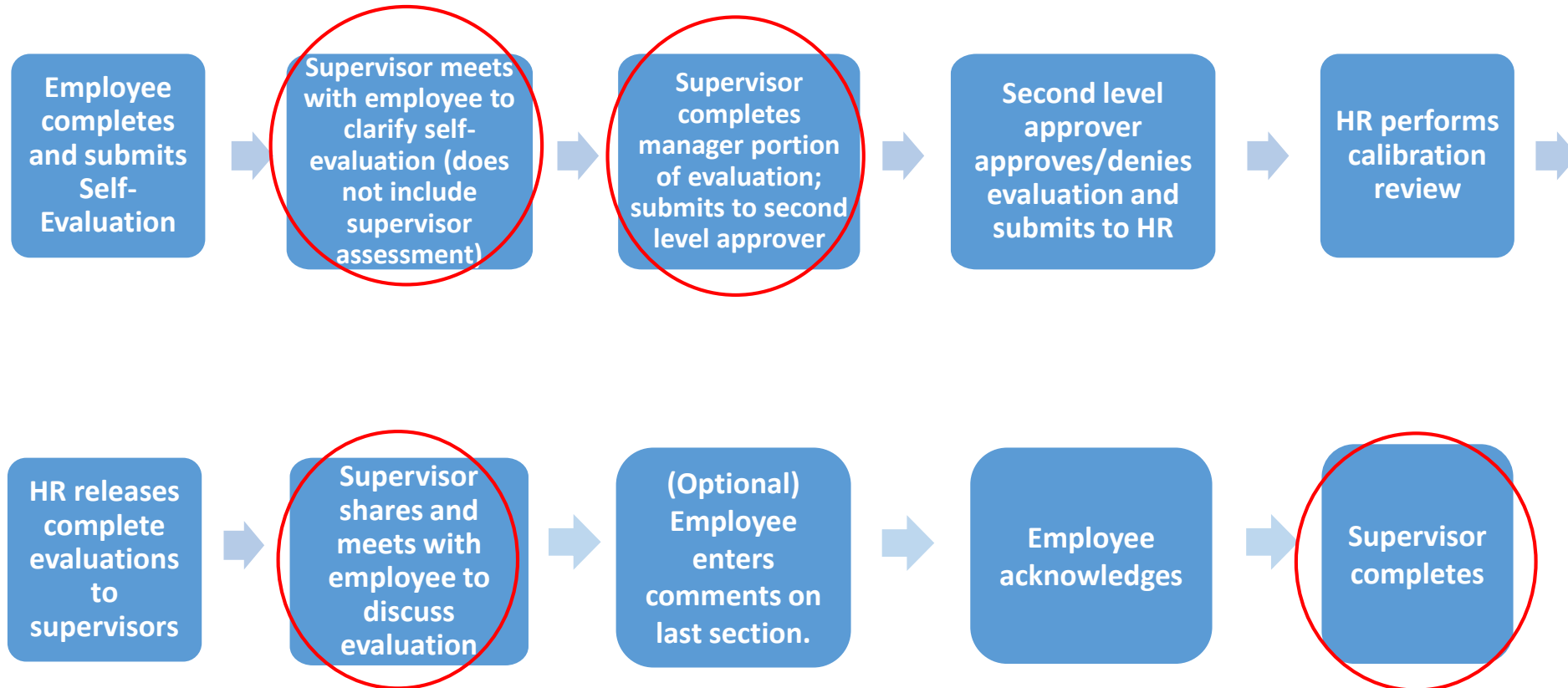
Screenshots of the Rest of the Process

This screenshot shows the Oracle Performance Process interface. The top navigation bar includes 'Favorites' and 'Main Menu'. The 'Performance Process' section is active, displaying a list of steps and tasks for Patricia Glass's ANR Annual Performance Docs (04/01/2019 - 03/31/2020). The steps are: Nominate Participants (Due Date: 03/31/2020), Review Participant Evaluations (Due Date: 04/19/2020), Review Self Evaluation (Due Date: 03/05/2020), and Complete Manager Evaluation (Due Date: 04/19/2020). The 'Complete Manager Evaluation' step is highlighted in yellow, indicating it is the current step.

This screenshot shows the Oracle Performance Process interface with the 'Complete Evaluation' dialog box open. The dialog box contains the text: 'You have almost finalized this document. If you have no further entries select confirm to complete this document. Upon selecting confirm your electronic signature will be added to this document.' Below the text are two buttons: 'Confirm' and 'Cancel'. A red arrow points from the 'Complete' button in the previous screenshot to the 'Confirm' button in this screenshot.

The background interface shows the 'Performance Process' section with the 'Steps and Tasks' list. The 'Complete Manager Evaluation' step is highlighted in yellow, indicating it is the current step.

ePerformance Workflow



Resources

https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Performance_Management/

[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](#)

Performance Management Webinar Resources

[2019-20 Staff Performance Eval Guidelines FAQ](#)

UC People Management Series

- We encourage all supervisors who are responsible for completing a performance review take two online people management courses:
 - **Setting Expectations and Individual Performance Goals**
(DAC-HRUCPM02; Estimated Duration: 1 hour)
 - **Giving & Receiving Feedback**
(DAC-HRUCPM03; 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. (The courses have not changed in the last year.)

Questions?

For future inquiries regarding the evaluation process, please contact Jodi Rosenbaum at jrosenbaum@ucanr.edu. If you have system-related questions, please contact Patricia Glass at pglass@ucanr.edu.

Giving and Receiving Feedback

- SARA: the natural response to feedback
 - **S**urprise
 - **A**nnoyance
 - **R**esistance
 - **A**cceptance



Reactions to Feedback: SARA Model

