

# UCPath ePerformance

## Annual Staff Performance Appraisal Process (2022) Employee Focus

Presented by ANR Human Resources  
March 2022

# 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:* Tuesday, March 8, 2-3pm

*Supervisor Role:* Wednesday, March 23, 2-3 pm

# 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, 2021 through March 31, 2022
- When does the process take place?
  - Annual review process runs from March 8, 2022 through June 25, 2022
- 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 (optional)	Separating/Retiring (optional)
Student Employees	Per Diem Employees	
Rehired Retirees (optional)	Contract Employees ( <i>less than 6 month appt.</i> )	
Temp Employment Service	<i>Probationary employees as of March 31, 2021</i> (mid pt. review will suffice)	

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

- Supervisors and employees are asked to acknowledge the challenges and impacts 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 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 8-Mar 25	<ul style="list-style-type: none"><li>Employee completes the ePerformance self-evaluation</li></ul>
April 1-May 9	<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 9	<ul style="list-style-type: none"><li><b>Deadline for ePerformance evaluations with proposed overall ratings</b></li></ul>
May 10-May 31	<ul style="list-style-type: none"><li>Calibration committee reviews proposed ratings for consistency and confirms final ratings</li></ul>
By June 17	<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 25	<ul style="list-style-type: none"><li>Supervisors share final results with employees</li><li>Employees acknowledge receipt</li></ul>

# 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




<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.

# UCPath ePerformance System Employee Evaluations

# What's New in 2022

- Attachments from employee can be transferred to the supervisor's evaluation
- Managers MUST complete Leadership Skills for all their employees (N/A if direct report is not a supervisor; score if they are.)
- Manager shares and requests acknowledgement at the same time.
- You should have a document in the My Historical Performance Docs if you submitted an evaluation last year and it went completely through the process.

# Employee Annual Performance Notification

 Reply  Reply All  Forward  IM



Mon 2/28/2022 11:31 AM

ucpath-notifications@universityofcalifornia.edu

**ANR Annual Performance Docs documents have been created**

To  Patricia Glass

 Follow up. Start by Monday, February 28, 2022. Due by Monday, February 28, 2022.

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

Document was successfully created for the following employee:

Patricia Glass (1[REDACTED])

You may select this link to access the document:

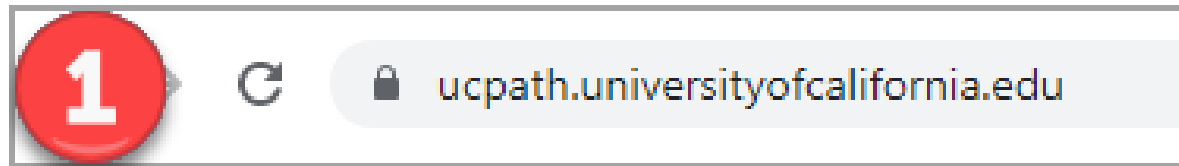
[https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=121094&EP\\_REVIEWER\\_ID=10205449&EP\\_ROLE=E&EP\\_USER\\_ROLE=E&TRANS\\_NAME=BASELINE-CREATE](https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=121094&EP_REVIEWER_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

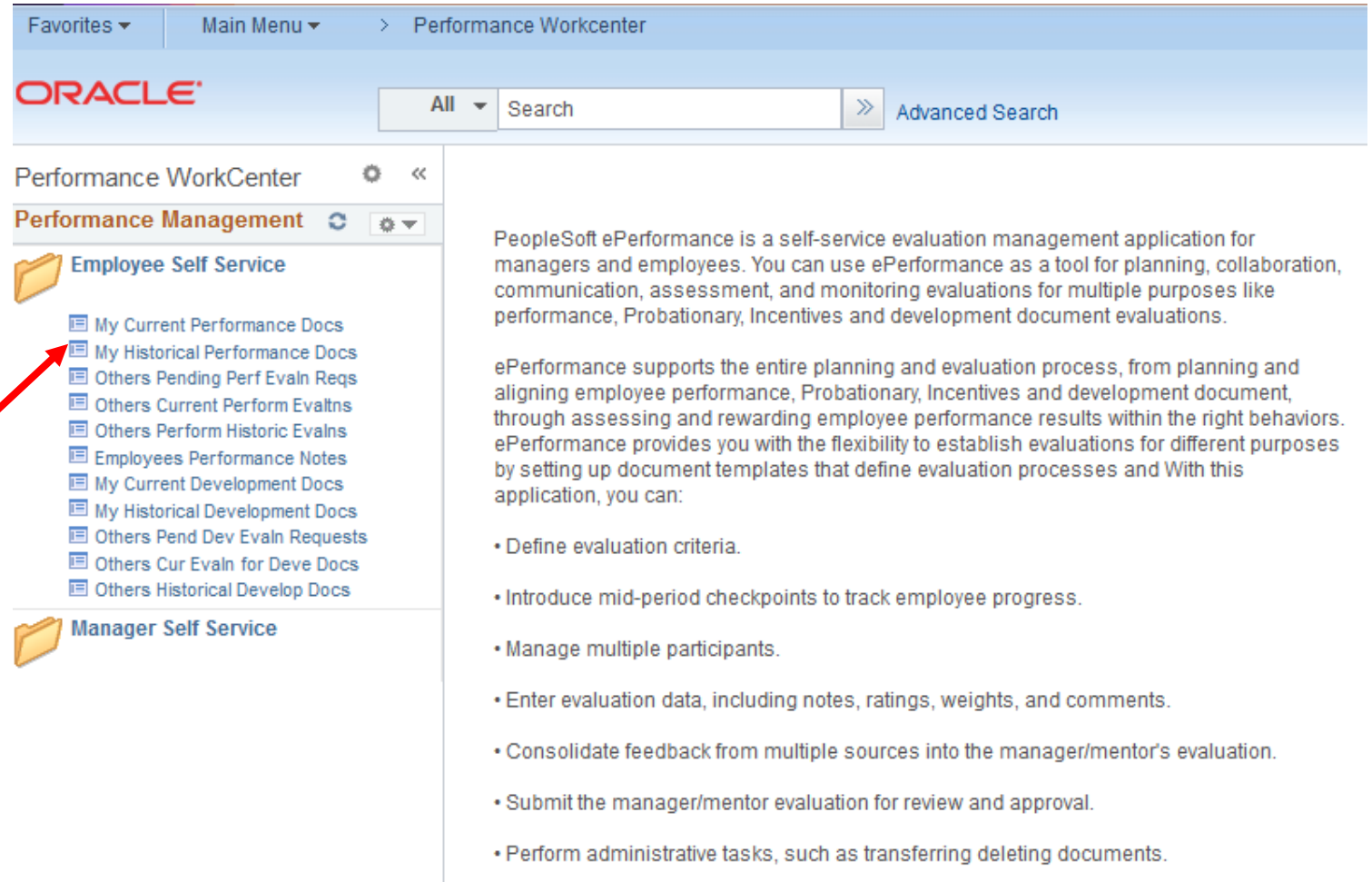
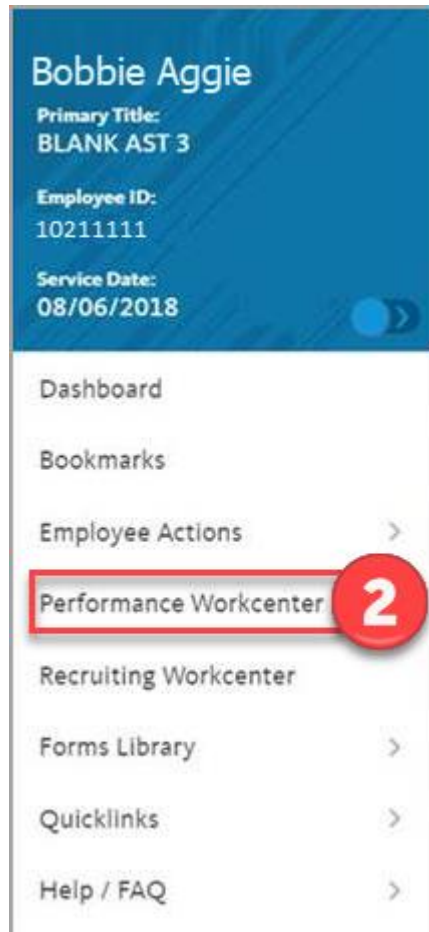
# Accessing Directly in UCPATH Online

1. Navigate to [ucpath.universityofcalifornia.edu](https://ucpath.universityofcalifornia.edu)  
(Contact IT Help from portal if you cannot get in.)  
<https://ucanr.zendesk.com/hc/en-us>
2. Click on **Performance WorkCenter**  
*This will open a new tab*
3. Click on **My Current Performance Doc**



# Accessing Directly in UCPATH Online

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



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](https://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 with the number '3'. A large red arrow points from this link to the main content area. The main content area shows the 'Current Performance Documents' section for user 'Bobbie Aggie'. A red box highlights the text 'Listed are your current performance documents.' Below this is a table titled 'Performance Documents'.

Employee ID	Document Type	Document Status	Business Unit	Period Begin	Period End	Job Title	Next Due Date	Manager
	ANR Annual Performance Docs	Evaluation in Progress	UCANR	04/01/2021	03/31/2022	BUS SYS ANL 4	05/07/2022	Karla Cynar
1020449	ANR Annual Performance Docs	Approval - Approved	UCANR	04/01/2020	03/31/2021	BUS SYS ANL 4	05/07/2021	Yiqian Jiang

# Employee's Summary of Accomplishments

ANR Annual Performance Docs

## Self-Evaluation - Update and Complete



Job Title

[Redacted]

Manager

[Redacted]

Document Type ANR Annual Performance Docs

Period 04/01/2020 - 03/31/2021

Template Staff Annual Perf Eval - 2021

Document ID 82897

Status Evaluation in Progress

Due Date 03/19/2021

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

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#### 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 

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### ▼ 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

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### ▼ 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 

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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

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### ▼ Strengths

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

Employee Comments

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





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### ▼ Areas for Development

Description : Highlight one or two areas for further development.

Employee Comments


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# Highlights

▼ Summary

**Description :** Discuss future goals, expectations, development opportunities, training recommendations, and any action plans. The ANR Learning & Development website is a resource for identifying training and professional development opportunities. This is critical where performance deficiencies have been noted, especially for those performance elements that have been rated "Partially Meets" or "Does Not Meet" job expectations.



Employee Comments




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Expansion Tool

 **UNIVERSITY OF CALIFORNIA**  
Agriculture and Natural Resources

# 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.

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

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# 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](#)

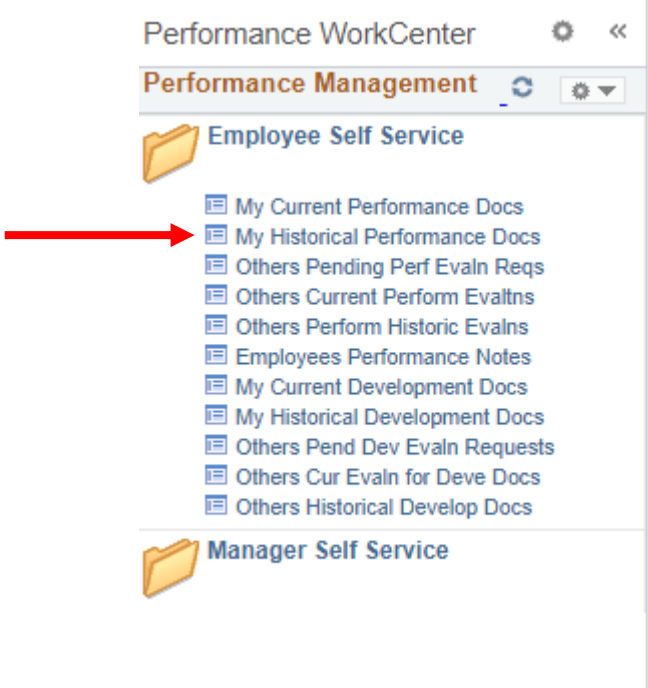
**Confirmation - Document Completed**

✔ You have successfully completed your evaluation.

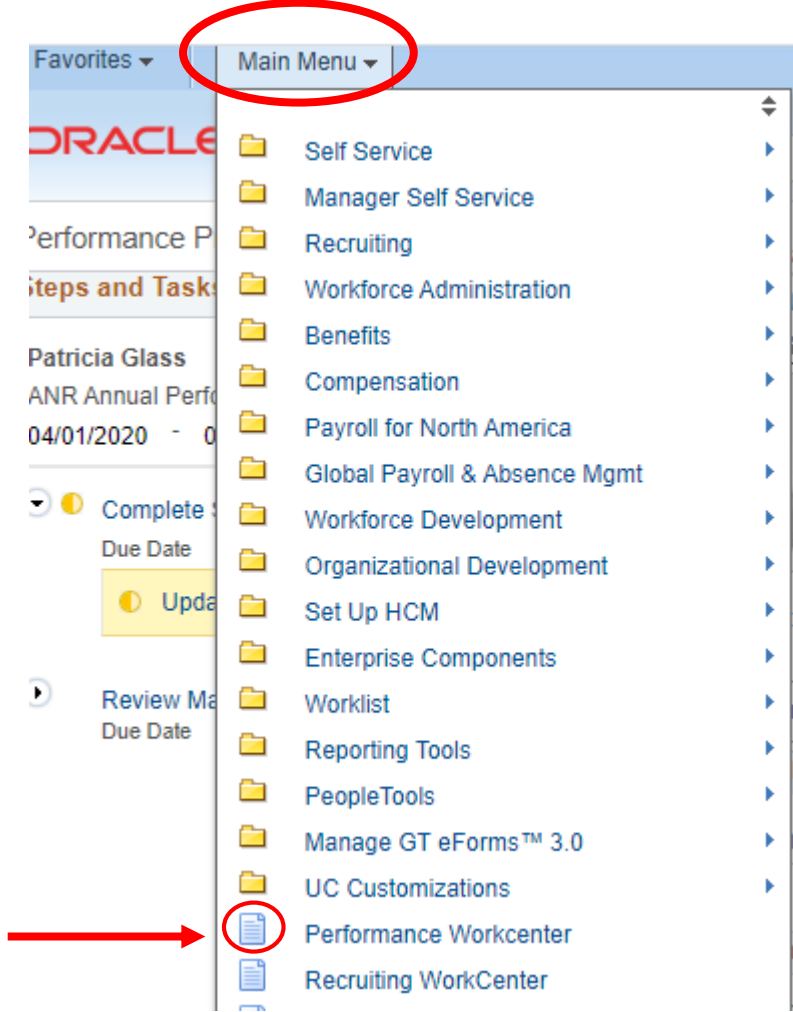
ANR Annual Performance Docs  
04/01/2019 - 03/31/2020 [Overview](#)

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

# Historical Documents



Or





# Who Can View Your Evaluation?

There are two levels of approval in ePerformance: your supervisor who is providing their evaluation and the next level up, who is generally your 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 your evaluation or what your primary supervisor has written

# Secondary and HR Approvals

- The supervisor submits evaluation to the Secondary Approver (the supervisor's supervisor)
- Secondary Approvers have ability to select “Approve” or “Deny” only
- Once approved, evaluation routes to HR for calibration review
- Human Resources approves and releases evaluation to the supervisor
- The supervisor selects “share” evaluation with employee

# 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**   
**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

# The Rest of the Process




- The supervisor and employee meet to discuss the evaluation details
- The employee **can** enter comments on Tab 6 and clicks “Acknowledge”
- The supervisor can go back in and read the final comments, if desired

# Final Comments

Accomplishments	Core Competencies	Leadership Skills	Highlights	Overall Rating	Comments
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▼ Section 6 - Employee Comments





Employee Comments



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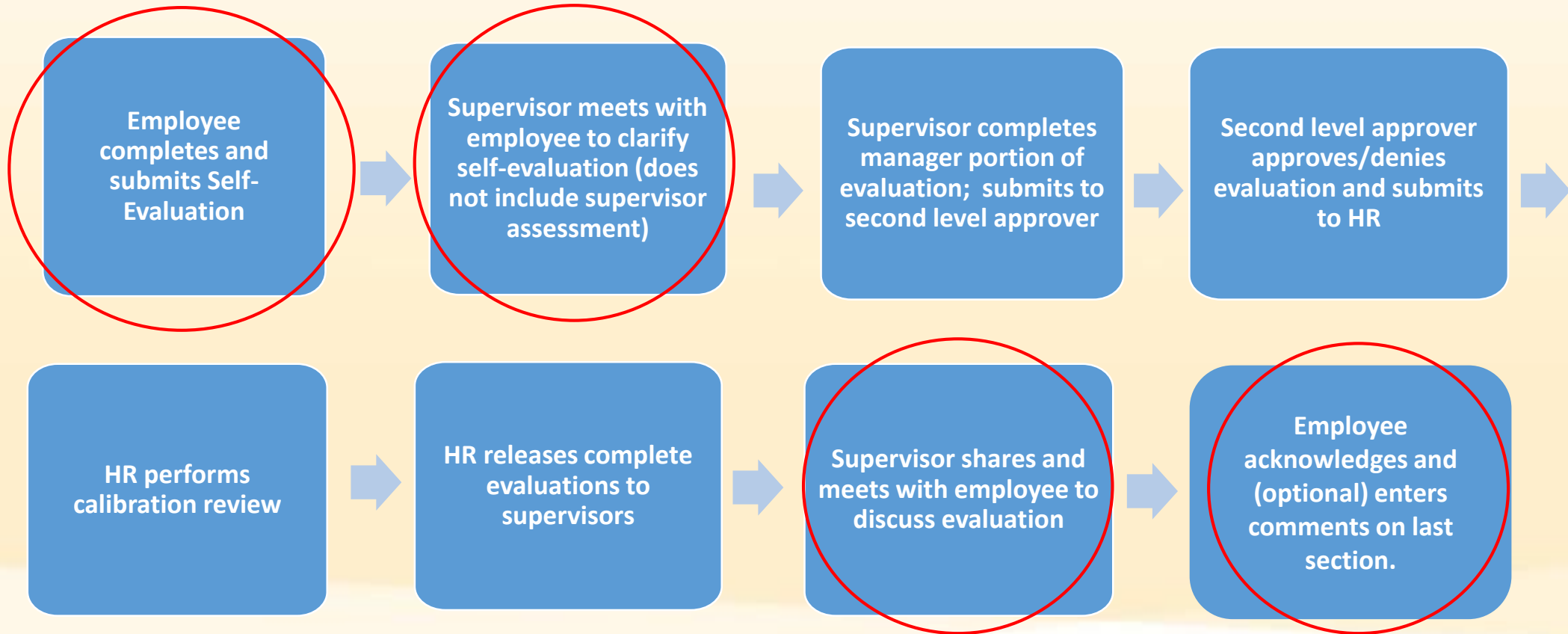
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Employee Comments

# ePerformance Workflow



# Resources

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

# 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).