UCPath ePerformance

Annual Staff Performance Appraisal Process (2024)
Employee Focus

Presented by ANR Human Resources
March 2024

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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 | 1-2 pm

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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/Supervisor Resources/Performance_Management/)

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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 (*less than 6 month appt.*)	
Temp Employment Service	Employees hired Sep. 30, 2023 or after (mid pt. review will suffice for probationary employees)	

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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.

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Annual Evaluation Timeline

Mar 6-Apr 2	• Employee completes the ePerformance self-evaluation
April 3 -May 10	• Supervisor meets with employee to review the ePerformance self-evaluation • Supervisor completes the manager evaluation fields • **Supervisor routes ePerformance evaluation to second level approver** • **Second level approver reviews and approves evaluation**
May 10	• **Deadline for ePerformance evaluations with proposed overall ratings**
May 11 - June 3	• Calibration committee reviews proposed ratings for consistency and confirms final ratings
By June 16	• HR communicates to unit directors/ dept. heads that calibration is complete • HR approves the final evaluations in ePerformance
By June 30	• Supervisors share final results with employees • Employees acknowledge receipt

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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

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.

UCPath ePerformance System Employee Evaluations

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.

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

(Please do not respond to this automatic notification.)

Access by email link above or go directly to UCPath.

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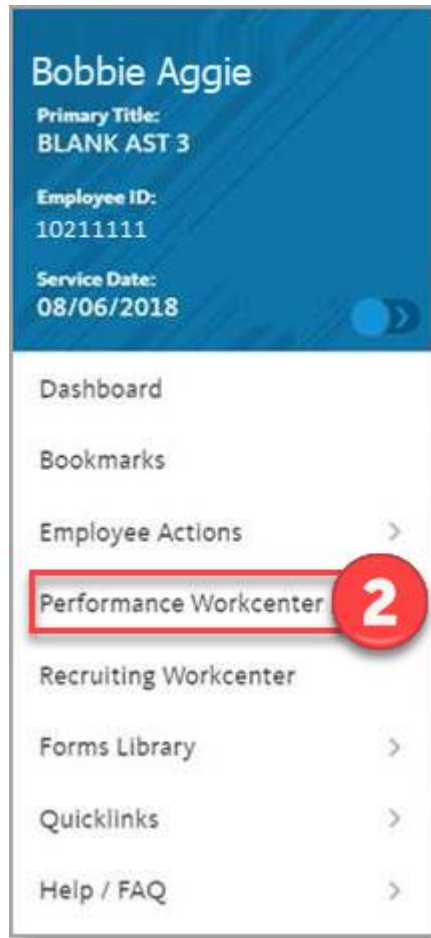
Accessing Directly in UCPath Online

1. Navigate to **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**
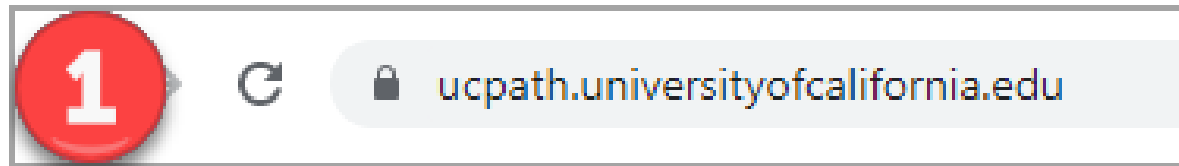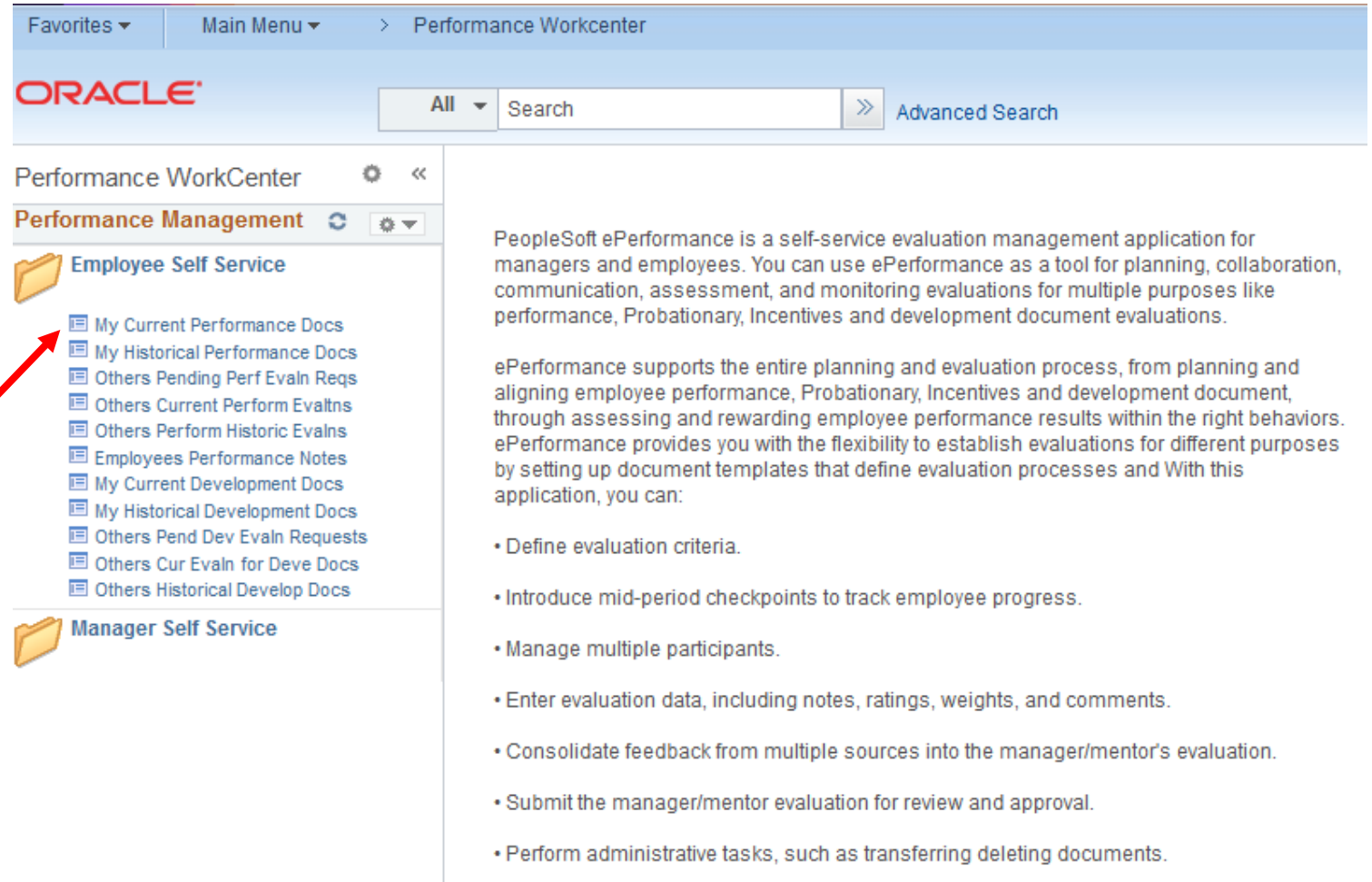
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Accessing Directly in UCPath Online

1. Navigate to ucpath.universityofcalifornia.edu

2. Click on **Performance WorkCenter**

Bobbie Aggie
Primary Title:
BLANK AST 3

Employee ID:
10211111

Service Date:
08/06/2018

Dashboard

Bookmarks

Employee Actions

Performance Workcenter

Recruiting Workcenter

Forms Library

Quicklinks

Help / FAQ

Favorites ▾ | Main Menu ▾ | > Performance Workcenter

ORACLE®

All ▾ | Search | ≫ | Advanced Search

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**

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.

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Accessing Directly in UCPath Online

1. Navigate to ucpath.universityofcalifornia.edu

2. Click on Performance WorkCenter

3. Employees: Click on **My Current Performance Docs**

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 - 2021
Status Evaluation in Progress

Manager
Period 04/01/2020 - 03/31/2021
Document ID 82897
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

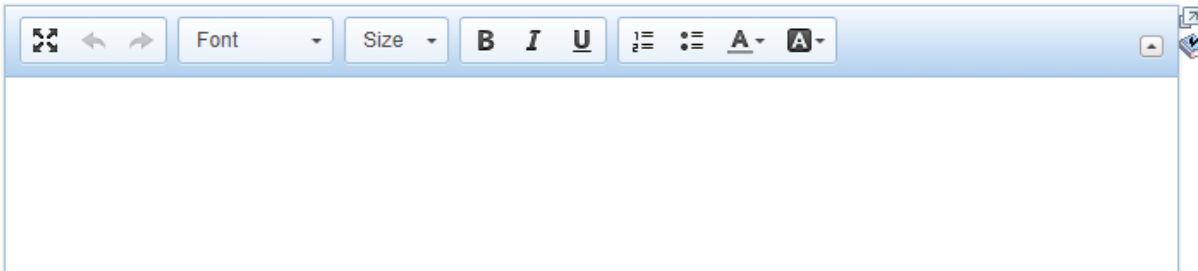| Accomplishments | Core Competencies | Leadership Skills | Highlights | Overall Rating | Comments |

▼ 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

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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 📋

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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.

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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

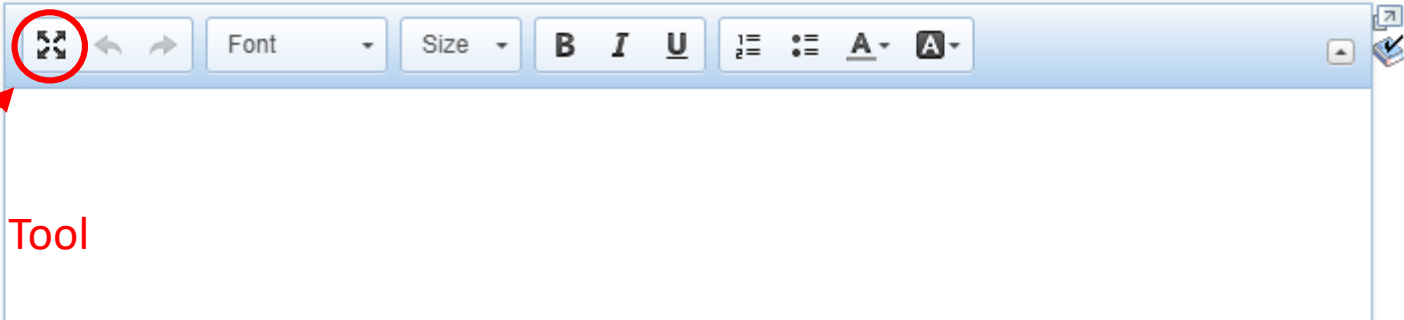| Accomplishments | Core Competencies | **Leadership Skills** | Highlights | Overall Rating | Comments |

▼ 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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▼ **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 📑

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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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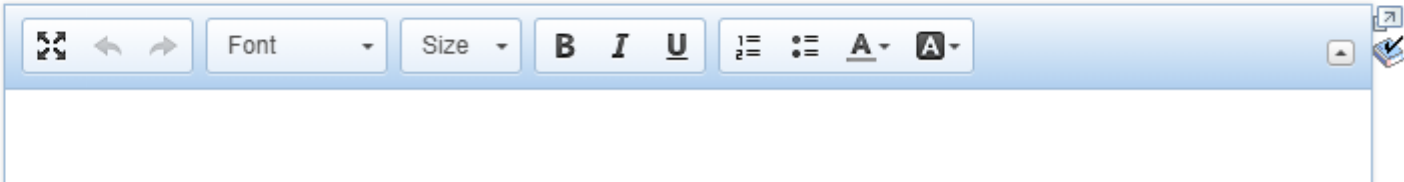
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| ▼ **Areas for Development** |

Description : Highlight one or two areas for further development.

Employee Comments
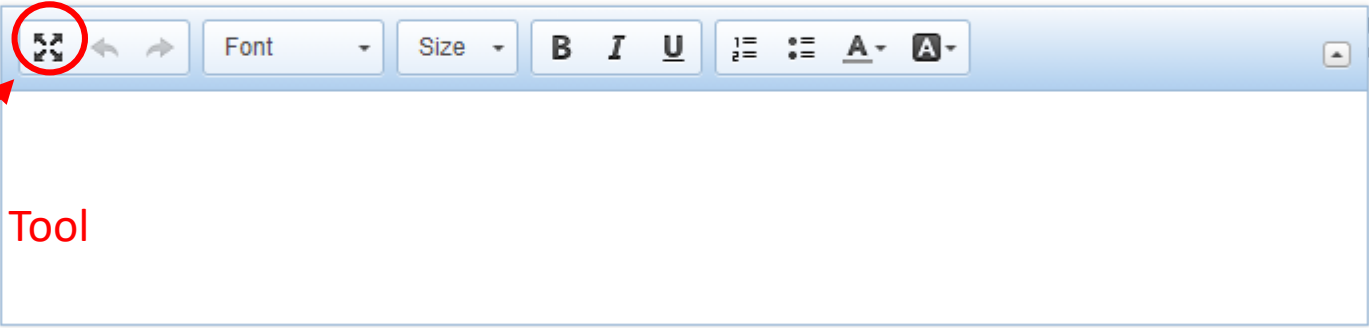
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Highlights

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

Expansion Tool

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Overall Summary

Return to Current Documents | Save | Complete

Print | Notify

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
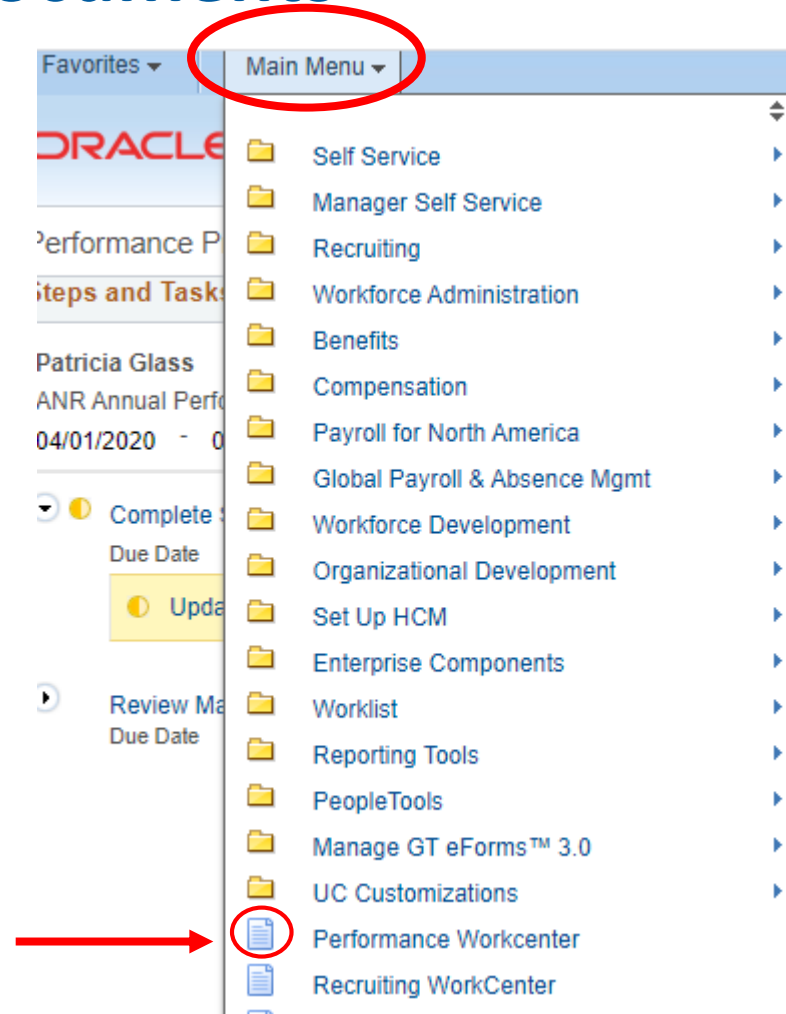
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Confirmation and Document Completed

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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

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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

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Reviewing Supervisor Input

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The Rest of the Process

- The supervisor and employee meet to discuss the evaluation details

- The employee **can** enter comments on Tab 6 if desired, and clicks "Acknowledge"

- The supervisor can go back in and read the final comments

- Once the evaluation has gone through the cycle completely, it can be found My Historical Performance Docs

ePerformance Workflow

Employee completes and submits Self-Evaluation

Supervisor meets with employee to clarify self-evaluation (does not include supervisor assessment)

Supervisor completes manager portion of evaluation; submits to second level approver

Second level approver approves/denies evaluation and submits to HR

HR performs calibration review

HR releases complete evaluations to supervisors

Supervisor shares and meets with employee to discuss evaluation

Employee acknowledges and (optional) enters comments on last section.

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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

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Questions?

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