

**UNIVERSITY
OF
CALIFORNIA**

Using ePerformance for STEP

Reference Guide

Contents

Table of Contents	2
Glossary	3
Step 1: Define Criteria (Set Goals)	4
Employee Goes First	4
Manager Reviews and Edits	7
Sit down together!	8
Step 2: Checkpoints (Check-Ins)	9
Employee Goes First	9
Manager Reviews and Comments	12
Sit down together!	14
Step 3: Finalize Criteria (Employee Self-Appraisal)	15
Employee Goes First	15
Manager Reviews.....	17
Step 4a: Nominate Participants (Optional Multi-Rater)	18
Employee and Managers nominate participants.....	18
Manager approves nominated participants	20
Nominated Participants Complete Evaluations	21
Step 4b: Review Participant Evaluations (Optional Multi-Rater)	24
Manager Reviews.....	24
Step 5: Complete Manager Evaluation (Yearend Appraisal)	25
Manager Goes First.....	25
2nd Level Approvals.....	28
Sit down together!.....	32
Employee Acknowledgement	34

Glossary

Checkpoint – The quarterly check-in between Employee and Manager. The majority of time is spent discussing the “Feedback” section.

Competencies – Abilities and behaviors the employee demonstrates in their day-to-day work.

Discussion Questions – These are the 4 questions in the “Feedback” tab that will be the focus of the quarterly check-in conversations.

Document – The annual performance appraisal form.

Define Criteria – Defining your goals and selecting your 2-3 focus competencies. Employee starts this process and Manager approves it.

ePerformance – The name of the new system UCOP is using for performance management.

Finalize Criteria – This is the exact same process as a normal checkpoint, except it is the final checkpoint before the annual evaluation. This is the last chance the employee has to make changes to their document.

Manager Evaluation – The yearend appraisal, at which point the manager selects an overall performance rating.

Nominee – Multi-rater

Nominate Participants – Process of selecting multi-raters and sending out invitations. Also referred to as “multi-rater feedback”.

Participant Evaluations – Formerly known as “multi-rater feedback.”

Proficiencies – Overall rating options (Outstanding, Exceeds Expectations, Solid Performance, Needs Development/New and Learning, Needs Attention).

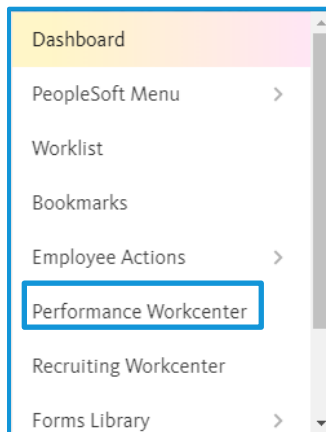
Second-level approver – The individual approving the Manager Evaluation and rating choice prior to the Manager and Employee meeting to review the yearend appraisal.

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

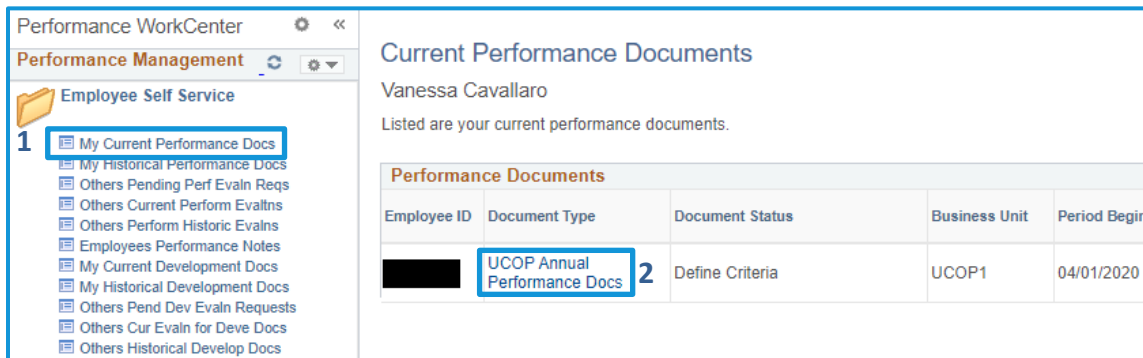
Step 1: Define Criteria (Set Goals)

Employee Goes First

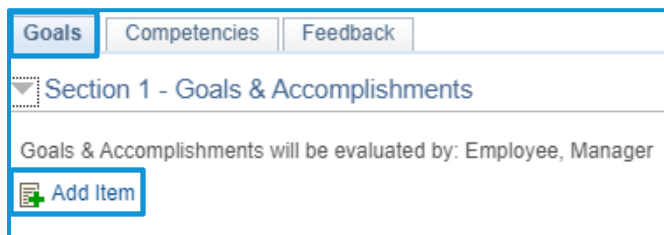
1. Log into UCPATH and select **Performance Workcenter** in the left menu.



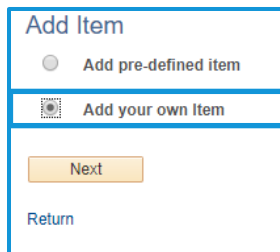
2. Click **My Current Performance Docs (1)**. Click on the **document name** you wish to view (2).



3. Click on **Add Item** in the **Goals** tab.



4. Choose **Add your own item** to add your goals.
TIP: Use **SMART** language!



- 5. Write your goal title and description. We recommend three to five goals.
- 6. Change the **Status** of your goal.

TIP: Save often! Consider writing your goals in MS Word and copy/paste them in.

The screenshot shows a form titled "Add Your Own Item". The title field contains "Learning and Development System Ownership". The description field contains a rich text editor with the text: "By March 2020, I will contribute to the L&D department systems as evidenced by:" followed by a bulleted list: "Finalizing monthly class schedules at least one month ahead" and "Implementing and coordinating the Learning and Development Smartsheet system". Below the description is a status dropdown menu with options: "Complete", "In Progress" (highlighted), and "Not Applicable". There are "Add" and "Return" buttons at the bottom left.

- 7. Navigate to **Competencies** tab and select **Add Competency**.

The screenshot shows a navigation bar with tabs for "Goals", "Competencies", and "Feedback". Below the tabs is a section titled "Section 2 - Competencies" with the text "Competencies will be evaluated by: Employee, Manager". A button labeled "Add Competency" with a plus icon is highlighted with a red box.

- 8. Select **Add pre-defined competency**. Click **Next**.

Note: For Competencies, always select "Add pre-defined competency".

The screenshot shows a dialog titled "Add Competency" with the instruction "Select an option to add the new competency." There are two radio button options: "Add pre-defined competency" (which is selected and highlighted with a red box) and "Add your own competency". A "Next" button is at the bottom, also highlighted with a red box.

9. Leave all fields blank and click **Search** to view the full list of Competencies.

Add a Pre-Defined Competency

To search for Competencies to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria

Competency

Content Group Type

Content Group

Search **Clear**

10. Choose 2-3 competencies to add to your evaluation. Click **Add**.

Search Results

Personalize | 1-10 of 10

Competencies		
<input type="checkbox"/> Belonging & Community: Demonstrates respect for all people		
<input type="checkbox"/> Communication: Clearly and effectively shares information		
<input type="checkbox"/> Change Agility: Anticipates and adapts to change		
<input type="checkbox"/> Collaboration: Builds partnerships to achieve results		
<input type="checkbox"/> Continuous Improvement: Strives for high-quality performance		
<input type="checkbox"/> Continuous Learning: Works to learn and increase knowledge		
<input type="checkbox"/> Mission & Vision Focus: Committed to the UC mission & vision		
<input type="checkbox"/> Problem Solving: Anticipates and conducts analysis		
<input type="checkbox"/> Service Focus: Delivers professional and responsive service		
<input type="checkbox"/> Stewardship: Demonstrates accountability and judgment		

Select All Deselect All

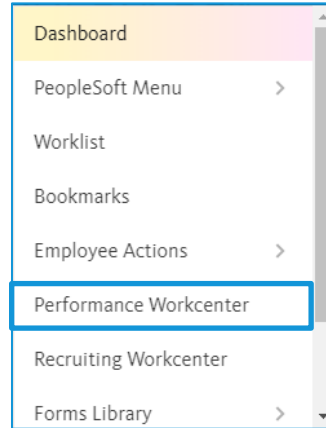
Add

11. Click **Save**. The system will not notify your manager when you complete, so you must notify your Manager that you have completed the Define Criteria step via email, phone, etc.

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

Manager Reviews and Edits


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



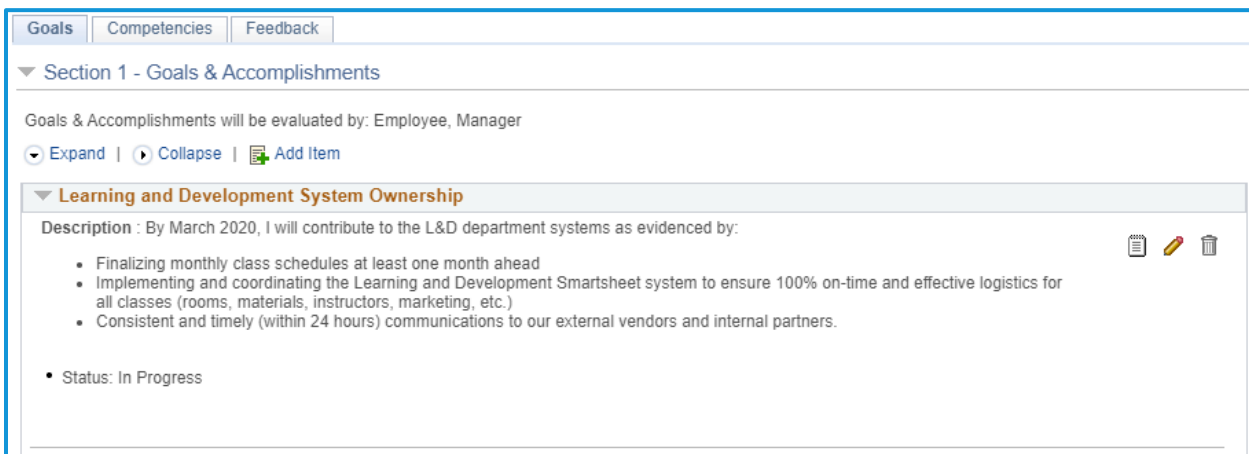
2. Click **Teams Current Performance Docs**. Click on the document name you wish to view. (For example, we'll view Vanessa Cavallaro's performance document.)

The screenshot shows the Oracle Performance Workcenter interface. On the left is a navigation pane with 'Performance Management' selected. Under 'Employee Self Service' and 'Manager Self Service', 'Teams Current Performance Docs' is highlighted with a blue box and a '1'. The main area is titled 'Current Performance Documents' and contains a 'Filter Criteria' section with fields for First Name, Last Name, Document Type, Document Status, Period Between, Job Code, and Department Set ID. Below this is a table of performance documents. The first row is highlighted with a blue box and a '2', showing a document for Vanessa Cavallaro.

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

3. Review **Goals** and **Competencies** tab. Edit as needed using the button (). When finished, click **Save**.


Note: The employee gets an email notification when you complete the checkpoint.



Goals | Competencies | Feedback

▼ Section 1 - Goals & Accomplishments

Goals & Accomplishments will be evaluated by: Employee, Manager

▼ Expand | ► Collapse |  Add Item


▼ **Learning and Development System Ownership**

Description : By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)
- Consistent and timely (within 24 hours) communications to our external vendors and internal partners.

• Status: In Progress


Sit down together!

1. Manager and employee sit down together to review the goals. Edit goals as needed using the edit button (). When goals are finalized, Manager clicks **Approve**.

Return to Current Documents |

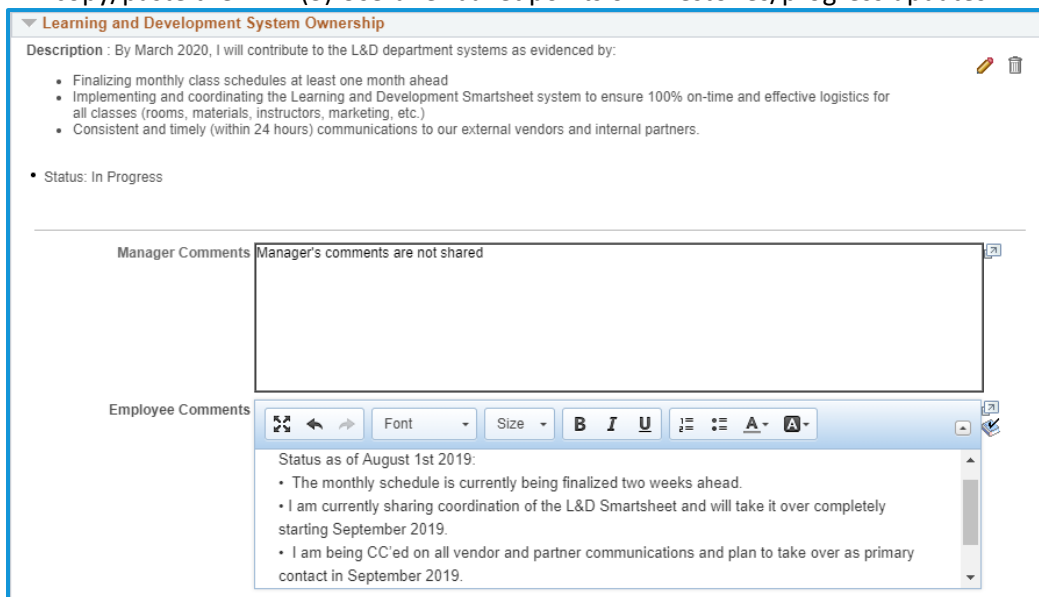
Step 2: Checkpoints (Check-Ins)

Employee Goes First

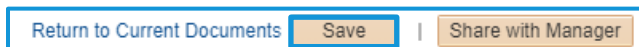
1. Add comments on **Goals tab**. If needed, edit your goals or update the goal status using the edit button ().



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

A screenshot of a web interface for a goal titled 'Learning and Development System Ownership'. The 'Description' field contains a text box with the following content: 'By March 2020, I will contribute to the L&D department systems as evidenced by:' followed by a bulleted list: 'Finalizing monthly class schedules at least one month ahead', 'Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)', and 'Consistent and timely (within 24 hours) communications to our external vendors and internal partners.' Below the description is a 'Status' field set to 'In Progress'. There are two comment sections: 'Manager Comments' (containing the text 'Manager's comments are not shared') and 'Employee Comments' (containing a rich text editor with the following content: 'Status as of August 1st 2019:', 'The monthly schedule is currently being finalized two weeks ahead.', 'I am currently sharing coordination of the L&D Smartsheet and will take it over completely starting September 2019.', and 'I am being CC'ed on all vendor and partner communications and plan to take over as primary contact in September 2019.').

Save the document.



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



Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager

Expand | Collapse | Add Competency

Competency 1: Collaboration

Description : Interacts with others in a way that demonstrates collaboration and cooperation. Builds partnerships with others to achieve organizational results. Cultivates, builds and maintains positive relationships across the organization.

Manager Comments: Manager's comments are not shared

Employee Comments:

Update August 1, 2019

I am continuing to meet with the HR Business Partners to learn more about their needs. I consistently check in with team members on how to best support them in their role. I ask for help when needed.

Save the document.

Return to Current Documents | Save | Share with Manager

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

Instructions | Goals | Competencies | **Feedback** | Required Training

Section 3 - Discussion Questions

Discussion Questions will be evaluated by: Employee, Manager

Expand | Collapse

Fulfilling Accomplishments

Description : What accomplishment(s) felt the most fulfilling and what additional accomplishments have you achieved in this quarter?

Manager Comments: Manager's comments are not shared

Employee Comments:

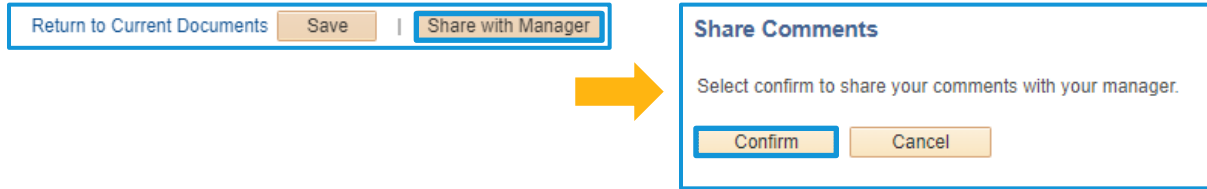
Update August 1st, 2019

I am building relationships with my colleagues and am now a resource for some of their questions. I have developed a familiarity with the Smartsheet process and feel more comfortable coordinating the process.

Save the document.

Return to Current Documents | Save | Share with Manager

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



Manager Reviews and Comments

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

Learning and Development System Ownership

Description : By March 2020, I will contribute to the L&D department systems as evidenced by:

- Finalizing monthly class schedules at least one month ahead
- Implementing and coordinating the Learning and Development Smartsheet system to ensure 100% on-time and effective logistics for all classes (rooms, materials, instructors, marketing, etc.)
- Consistent and timely (within 24 hours) communications to our external vendors and internal partners.

• Status: In Progress

Manager Comments

8/2/19 – Great. Let's talk about where you need support.

Employee Comments

Status as of August 1st 2019:

- The monthly schedule is currently being finalized 2 weeks ahead
- I am sharing coordination of the L&D Smartsheet and will take it over starting Sept. 2019
- I am being CCed on all vendor and partner communications, and plan to take over sas primary contact in September 2019

Save the document.

[Return to Current Documents](#)

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

Competency 1: Collaboration

Description : Interacts with others in a way that demonstrates collaboration and cooperation. Builds partnerships with others to achieve organizational results. Cultivates, builds and maintains positive relationships across the organization.

Manager Comments

8/2/19 – I am consistently getting positive feedback from other departments about how much they enjoy working with you!

Employee Comments

Update August 1, 2019

I am continuing to meet with the HR Business Partners to learn more about their needs. I consistently check in with team members on how to best support them in their role. I ask for help when needed.

Save the document.

[Return to Current Documents](#)

- 4. Review the Employee’s comments for each question on the **Feedback tab**. Add your own comment above the Employee’s. Remember to **date your comments!**

Manager Accountability

Description : What else can I do to help you be successful? Start, stop, keep doing?

Manager Comments

Great idea! Let's talk about which ones interest you the most.

Employee Comments

I appreciate our weekly meetings and your coaching approach. I would like to start accompanying you to meetings with department leaders to observe how you consult with our internal partners.

Created By: Template 01/30/2020 3:42PM

Save the document.

[Return to Current Documents](#)

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

[Return to Current Documents](#) |



Share Comments

Select confirm to share your comments with the employee.

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

Sit down together!

- After Manager and Employee sit down together for your check-in, the Manager clicks **Complete Checkpoint** in the menu bar.

[Return to Current Documents](#) |



Complete Checkpoint

Select confirm to indicate a review was held with the employee and this checkpoint is complete.


Note: Checkpoints 2 and 3 follow the exact same process as Checkpoint 1.

- Optional: You may need to skip a Checkpoint. You can do so by clicking **Skip Checkpoint** in the menu bar.

[Return to Current Documents](#) |

Step 3: Finalize Criteria (Employee Self-Appraisal)

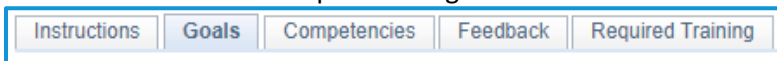
Employee Goes First


1. Navigate to **Finalize Criteria** in the left-hand navigation menu. Add your final comments on **Goals tab**. If needed, edit your goals using the edit button ().

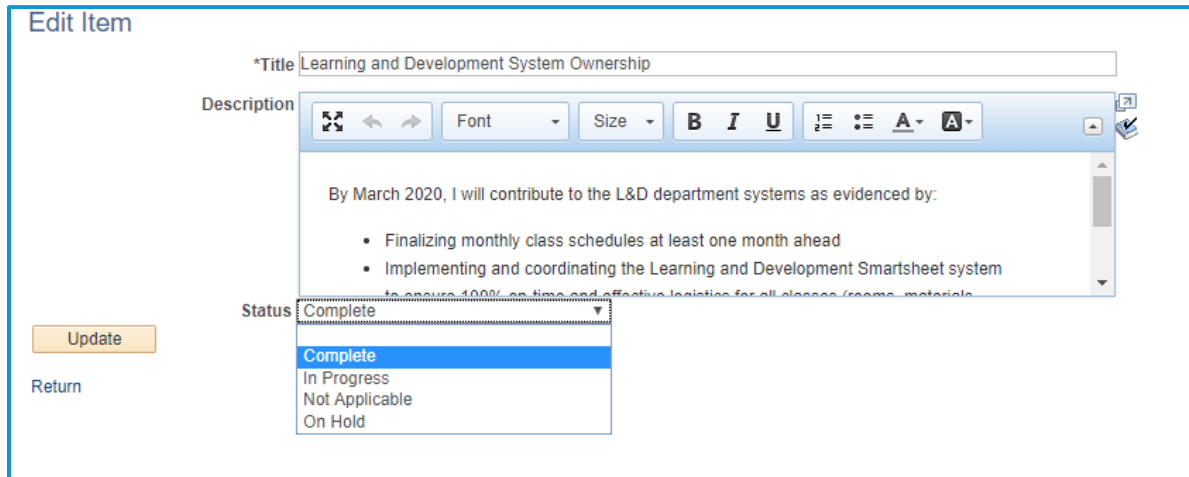
Note: This is the last time the employee is able to add their comments before the final yearend appraisal and overall rating. Manager comments will not be shared at this step.

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

2. Add final comments and updates for goals on the **Goals tab**.



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



Save the document.



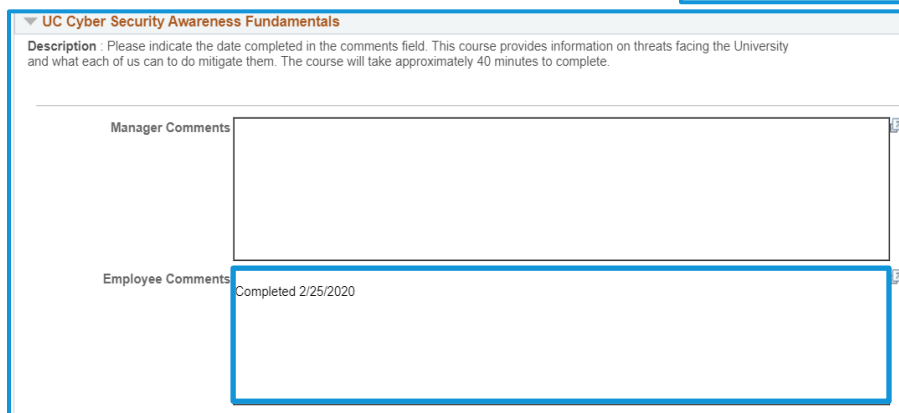
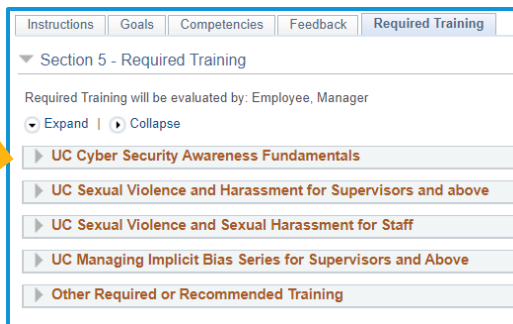
3. Add final comments in **Competencies and Feedback tabs**. Remember to date your comments.



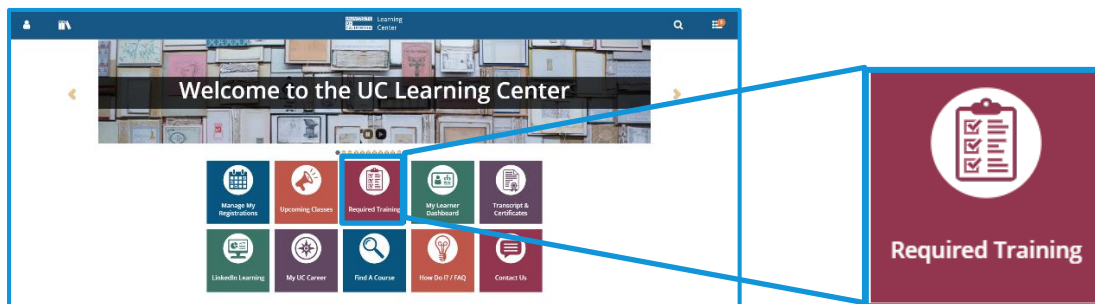
Save the document.



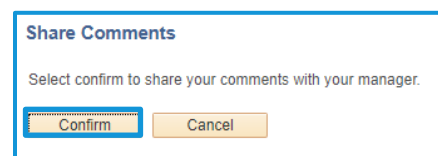
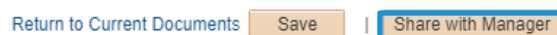
- 4. Add the dates of completion for the compliance trainings in the comment boxes in the **Required Training** tab.



Tip: To check the status and completion date of your required training, log into the UC Learning Center at ucop.edu/ucoplearningcenter/ using your Single Sign-On.



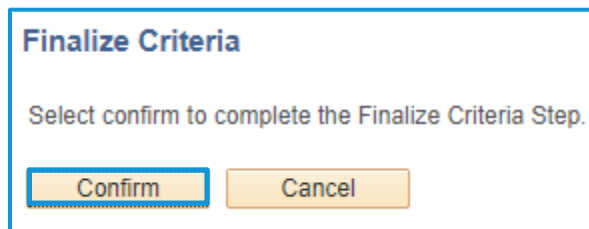
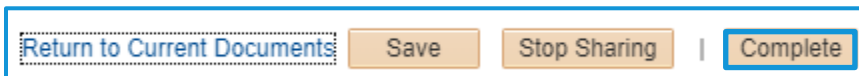
- 5. Once you add your final comments and update your goal status, click **Share with Manager** in the menu bar. On the next screen, **Confirm** share.



Manager Reviews

1. Navigate to the performance document and review the Employee’s updated status and comments on **Goals, Competencies, Feedback, and Required Training**.
2. Comment on the Employee’s progress on **Goals, Competencies, Feedback, and Required Training**. Be sure your comments support an overall rating for the performance cycle.
3. **Save** the document after your entry on each tab.
4. **Do not submit yet**. You must notify your employee outside of the system that you completed entering your comments. .
5. Meet with your Employee for your final checkpoint meeting of this performance cycle. Add any final comments, if needed.
6. **Save** the document.
7. When all edits have been made, select the **Complete** button in the upper-right-hand menu. Select **Confirm**.

Note: Clicking **Complete** moves the document into the formal “Manager Evaluation” stage. At this point, all of the goals and comments are locked in, and the employee can no longer make edits. The manager can now progress to the final yearend appraisal and overall rating.



8. Select **Return to Current Documents**.

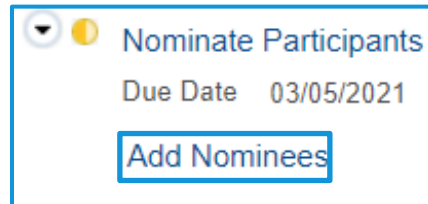
Step 4a: Nominate Participants (Optional Multi-Rater)

Participants Evaluators (formerly known as “multi-raters”) can be selected by both manager and employee. The manager has final approval on the selected participants and generates the invitation to complete the feedback questions. The feedback provided by the nominated participants is anonymous to the employee and it is up to the manager to determine how the feedback is shared in the yearend appraisal.

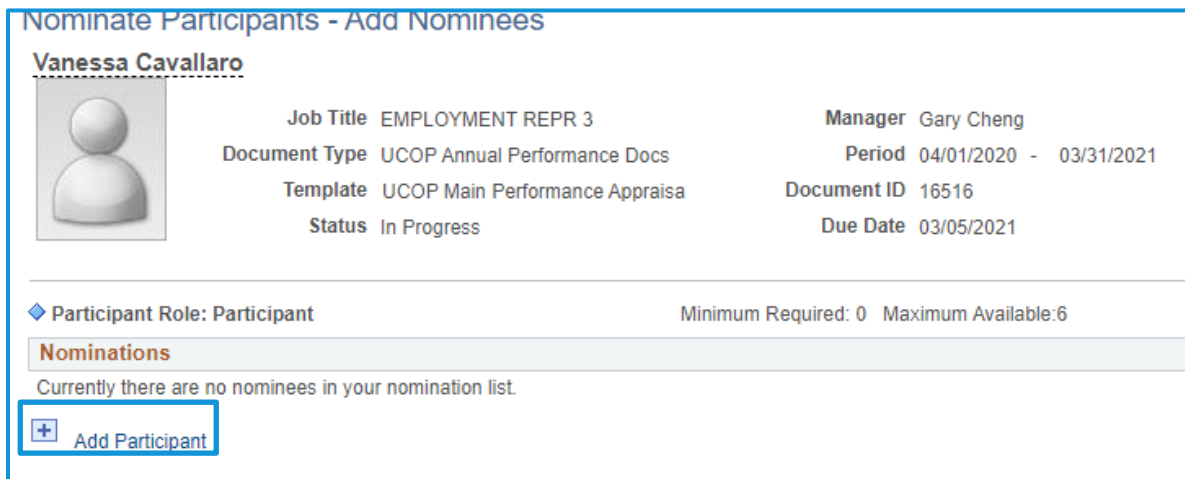
Employee and Managers nominate participants

1. Employee and Manager meet to discuss and agree on who they will nominate as multi-raters for the Employee.

2. To add a multi-rater or “Nominee”, Employee clicks **Nominate Participants** on the left-hand task bar and selects **Add Nominee**.



3. Select **Add Participant** and use the directory to select a UC employee as participant.



Nominate Participants

▶ **Instructions**

Search Criteria

Last Name

Business Unit

First Name

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

Person Search

Nominate Participants

▶ **Instructions**

Search Criteria

Last Name

Business Unit

First Name

Search Results

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

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

[Return to Current Documents](#)

✔ You have successfully saved your nominations.

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

Nominations

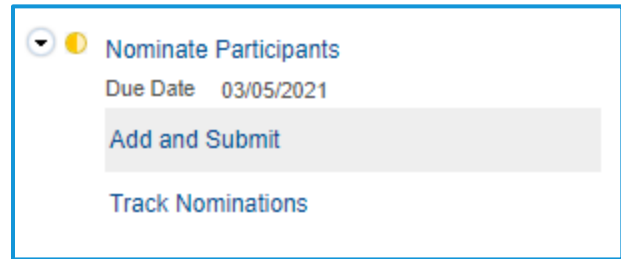
Nominee	Action
Miranda Josafat	<input type="button" value="trash"/>


Add Participant

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

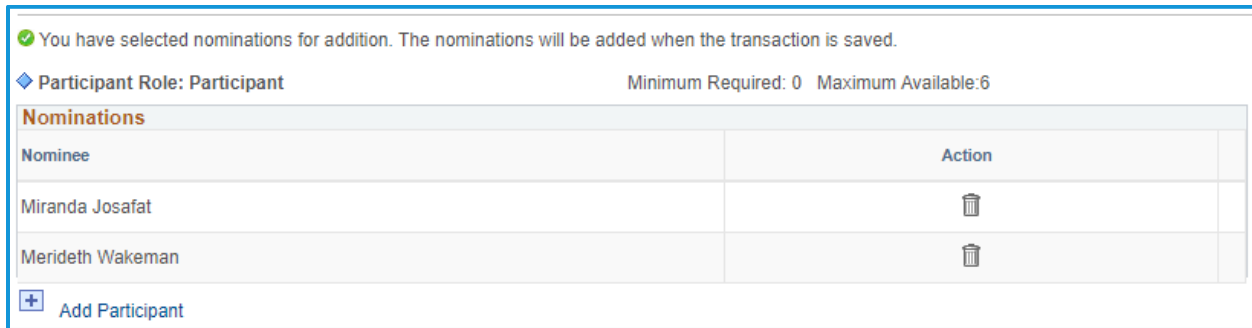
Manager approves nominated participants

1. Manager logs in and selects the employee document they are reviewing. Navigate to the left-hand task bar to Nominate Participants. To add nominees, select **Add and Submit**. To track pending requests, select **Track Nominations**.



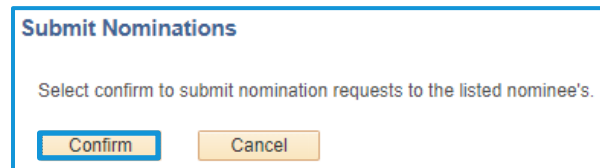
2. Manager can search and add nominees for Participant Evaluations using the same process as the Employee. Manager is able to remove any nominations using the **Delete** icon ().

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



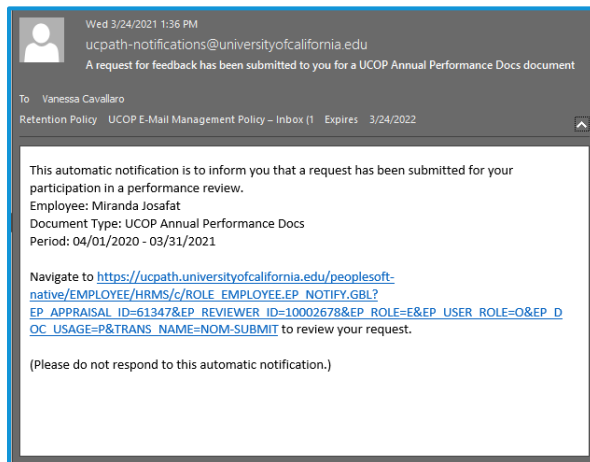
3. Once all Participant Evaluation nominees are listed, select **Save** and then **Submit Nominations**. Select **Confirm** to send nomination requests to the participants.

[Return to Current Documents](#) |

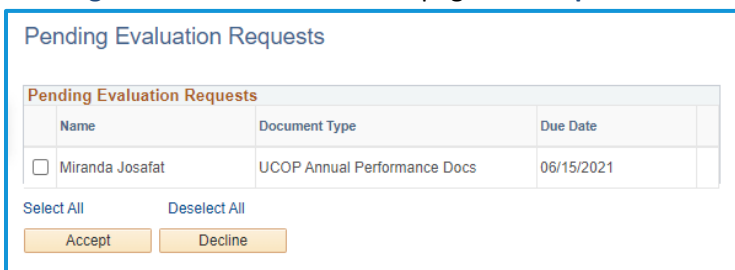


Nominated Participants Complete Evaluations

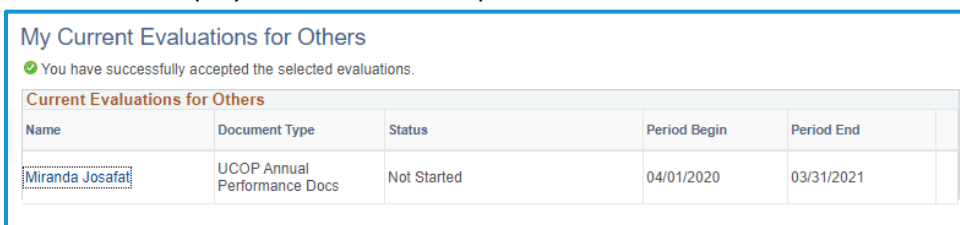
1. The nominated Participant will receive one system-generated email notification requesting their participation in the review process.
2. To access the multi-rater, click the link in the email.



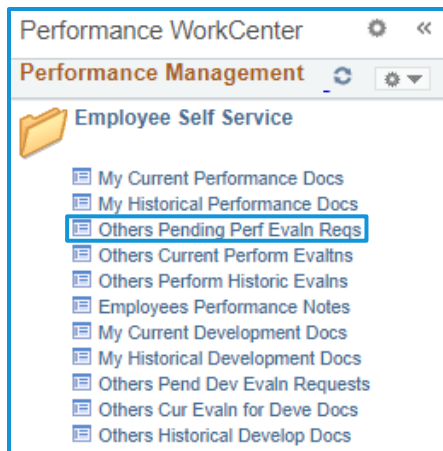
3. The link will take you to the UC Path login page. Once you login, you will be taken to your **Others Pending Performance Evaluations** page to **Accept** or **Decline** the nomination.



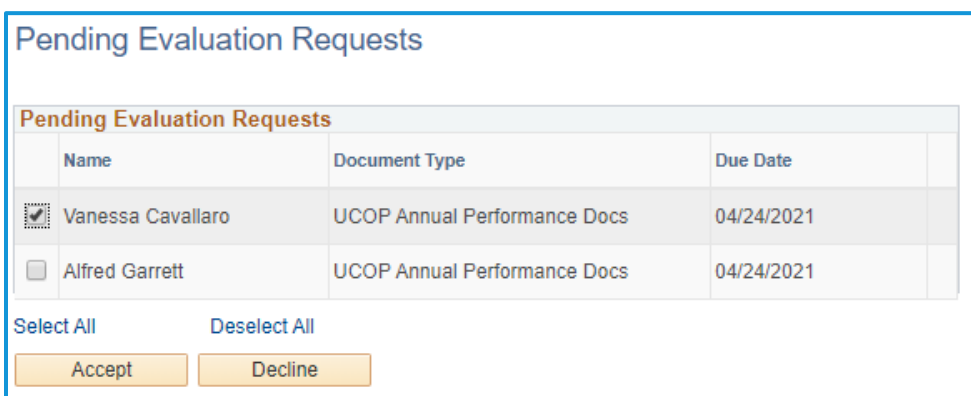
4. If you accept, you will be taken to your **Others Current Performance Evaluations** page. Click on the name of the employee to view and complete the multi-rater form.



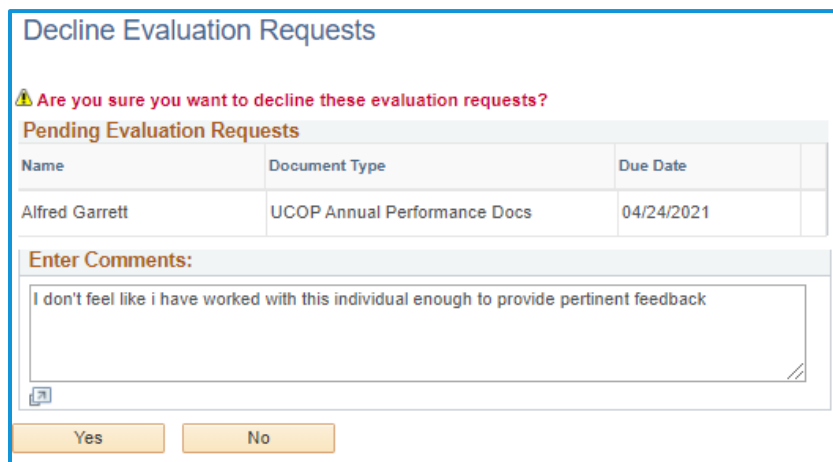
- 5. To access the multi-rater without the notification email, log into UC Path and select Performance Work Center. Navigate to the left-hand menu and select **Others Pending Perf Evaluation Requests**.



- 6. You can accept or decline nominations from this window.



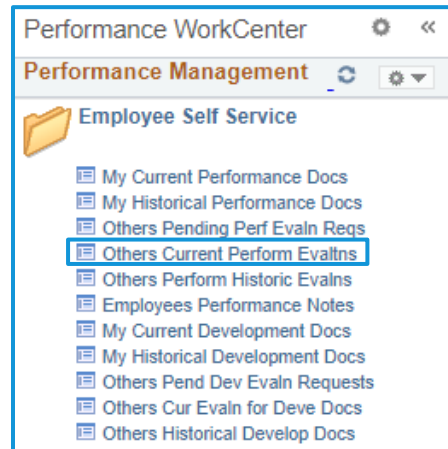
- 7. If declining, enter a comment and submit.



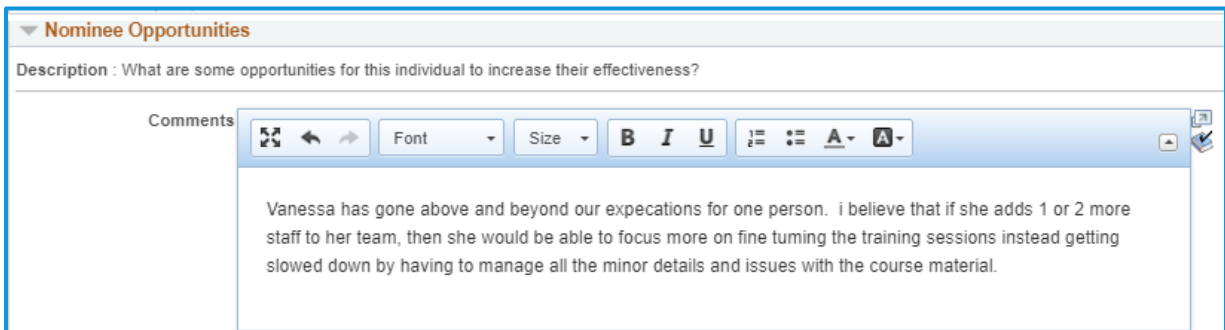
8. If accepting, **Accept** the nomination.



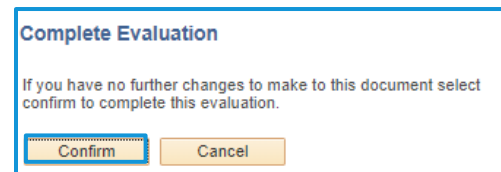
9. To fill out the evaluation, navigate back to the main ePerformance menu and select **Others Current Performance Evaluations**.



10. Respond to the four discussion questions. Remember to **Save** your progress!
You can leave and return to the form after saving by clicking **Return to Current Documents**, and then selecting the Employee name when you are ready to return to the form.



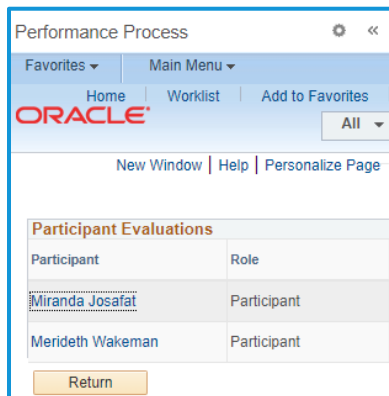
11. To complete and submit, select **Complete** in the upper-right menu, then select **Confirm**.



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

Manager Reviews

1. Navigate to the left-hand menu to **Review Participant Evaluations**. Select the Participant Evaluation you want to view.



2. Review the feedback from the Participant Evaluations. You can incorporate the feedback into the Manager Evaluation.

Note: The Manager should paraphrase or aggregate the feedback data rather than directly quoting or cutting and pasting the responses.

UCOP Annual Performance Docs

Evaluation

The document status is Completed.

Long Format | Reopen

Section 1 - Nominations

Expand | Collapse

Nominee Feedback

Description : You have been identified as someone who has had regular interactions with this employee. Please describe the nature of your interactions and provide feedback on the quality and effectiveness of your work together, highlighting any specific areas of performance that stand out.

Comments

Vanessa is great to work with, she always responds in a timely manner and is professional and detail oriented

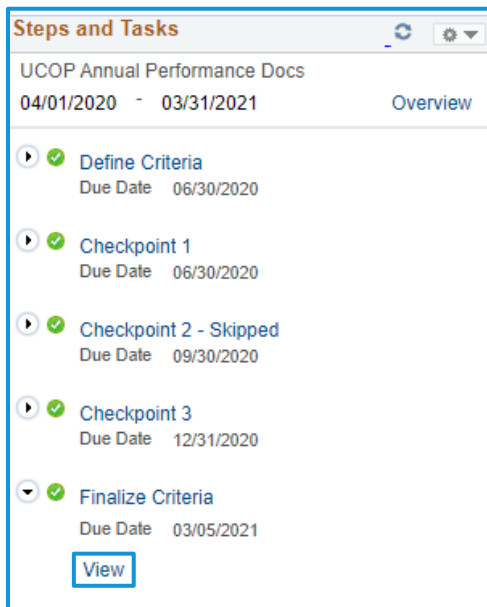
Created By: Template 01/30/2020 3:42PM

Step 5: Complete Manager Evaluation (Yearend Appraisal)

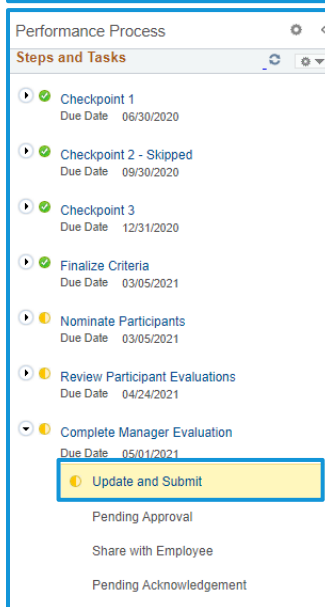
Manager Goes First

1. Navigate into the performance document.

Tip: To review the Employee comments that have been documented over all of the checkpoints, Navigate to “Finalize Criteria” on the left side of the task bar and click on “View” which will provide a view of the cascading comments for Goals, Competencies, and Feedback questions, as well as Required Training completion dates.




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



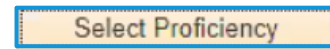
3. If needed, add additional comments to support your overall rating.

4. To submit overall rating, navigate to **Goals** tab and scroll down to **Goals and Accomplishments Summary**, where you will see the **Manager Rating**. Select the overall rating from the drop-down menu of proficiencies.

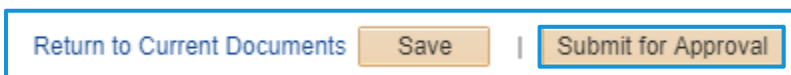


5. Click the **Ratings Descriptions** button to the right of the drop-down () for detailed descriptions of each rating to ensure accuracy. You can select the rating from this screen as well and then click **Select Proficiency**.

Proficiencies	
Rating	Description
<input type="radio"/> Outstanding	<ul style="list-style-type: none"> Consistently role models and exhibits mastery of core job knowledge and functions, responsibilities, and continually proposes enhancement recommendations in current job and new work opportunities. Consistently produces exceptionally high quality work exceeding expectations on all goals within control, in planned timelines. Consistently seeks value-added opportunities for new responsibilities and challenges. Demonstrates superior interpersonal skills, is respected by others, and is sought after to participate in or lead projects and work groups
<input type="radio"/> Exceeds Expectations	<ul style="list-style-type: none"> Very high level of contribution Consistently performed above and beyond all defined expectations
<input type="radio"/> Solid Performance	<ul style="list-style-type: none"> Consistently demonstrates core job knowledge, skills, and abilities to effectively perform job functions. May occasionally exceed expected performance Consistently achieves all goals within control, in planned timelines Shares ideas, information, skills, and knowledge; listens and is responsive to manager and others; maintains a positive attitude
<input type="radio"/> Need Development/New & Learning	<ul style="list-style-type: none"> Performance expectations partially met Moderate level of contribution Some critical goals completed Achievement below expectations Improvement needed in the position New in position, developing appropriately; Performance was good given time in the position
<input type="radio"/> Needs Attention	<ul style="list-style-type: none"> Does not consistently demonstrate core job knowledge and competencies required to perform job functions effectively Falls to consistently achieve expected goals, within control, in planned timelines. Does not consistently demonstrate interest in or ability to collaborate and share information with others to deliver results Additional training or commitment is required



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



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

Submit for Approval

Select confirm to submit this document for approval.

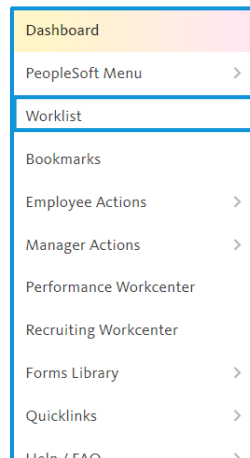
Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

The overall rating you have assigned to this employee is **Solid Performance**.

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

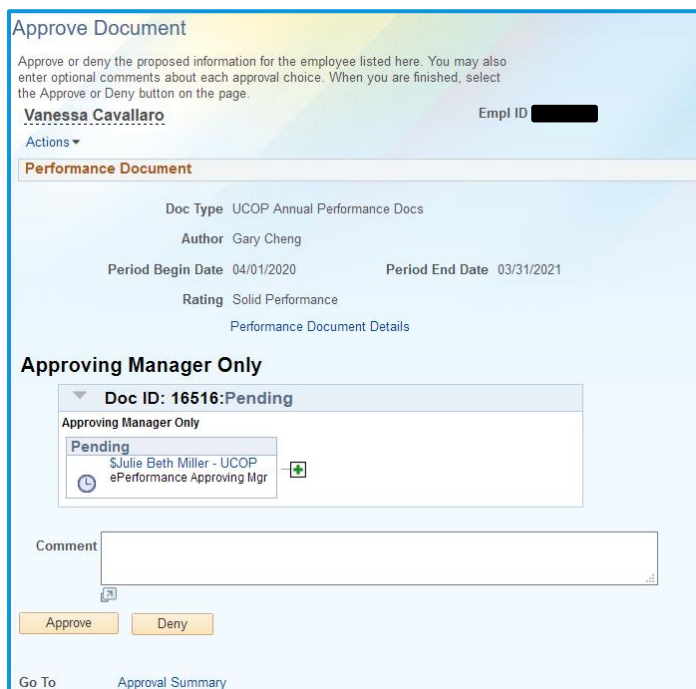
2nd Level Approvals

1. Second-level Approver logs into UC Path and selects **Worklist** in the left-hand navigation menu.

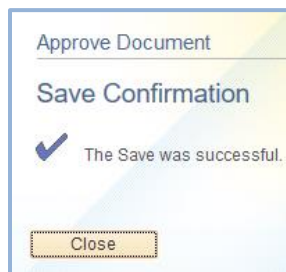


2. Select the appropriate performance document to review. You can **Approve** or **Deny** from the main worklist screen.

If you are denying the document, leave a **comment** for the Manager on your reasoning for the denial.



3. Save the status.



Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Vanessa Cavallaro Empl ID [REDACTED]

Actions ▾

Performance Document

Doc Type UCOP Annual Performance Docs
 Author Gary Cheng
 Period Begin Date 04/01/2020 Period End Date 03/31/2021
 Rating Solid Performance
 Performance Document Details

Approving Manager Only

Doc ID: 16516:Approved

Approving Manager Only

Approved
 ✓ Julie Beth Miller - UCOP
 ePerformance Approving Mgr
 02/07/20 - 11:50 AM

- A second-level approver can also access performance documents through the **Manager Self-Service Menu** of the **Performance Workcenter**. Select **Approve Perform/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

- Enter the information for the employee. Then select the magnifying glass next to **Document Type**.

Select Transaction to Approve

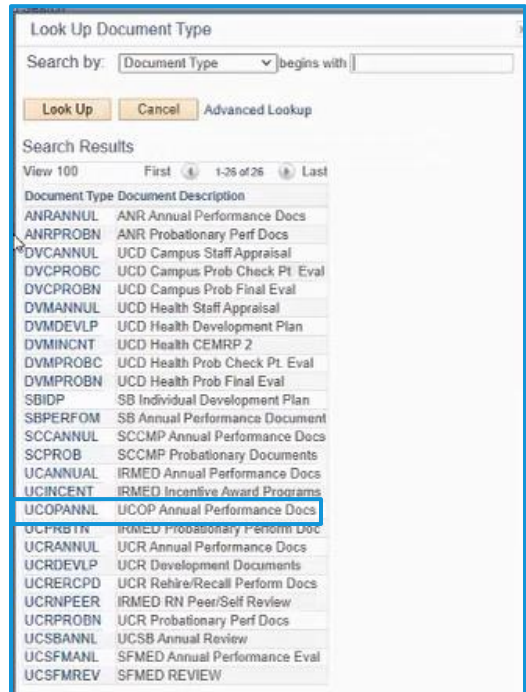
Whenever Managers access this Page, they have to enter Document Type to filter Pending Approvals.

Filter Criteria

First Name: GARY Last Name: Cheng
 Manager First Name: Last Name:
 Document Type: [magnifying glass] Document Template ID: [magnifying glass]
 Period Between: [] - []

Search Clear

- Clicking the magnifying glass will bring up the Lookup Document Type menu. Select **UCOPANNL – UCOP Annual Performance Docs.**



- Click **Search.**



- The performance document(s) matching the filter criteria will come up. The table will show the overall performance rating for the document(s) You can **Approve** or **Deny** from here, or click on the employee name to go to the Approvals page.

Performance Document				
Select	Empl ID	Name	Job Title	Department
<input type="checkbox"/>		Gary Cheng	TRAINER 4	816200

Document ID	Begin Date	End Date	Document Status	Approval Status	Submitted By	2nd Level Approver	Document Type	Summary Rating	Goals & Accomplishments
61839	04/01/2020	03/31/2021	Approval	Pending Approval	Vanessa Cavallaro	Merideth Wakeman	UCOP Annual Performance Docs	Solid Performance	Solid Performance

9. Click on the **Employee Name**. You will be taken to the **Approval Screen**.
Click on **Performance Document Details** to view the performance document. Otherwise, leave your comment in the **Comments** field and **Approve** or **Deny** the document.

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Gary Cheng Empl ID [REDACTED]

Actions ▾

Performance Document

Doc Type UCOP Annual Performance Docs

Author Vanessa Cavallaro

Period Begin Date 04/01/2020 Period End Date 03/31/2021

Rating Solid Performance

[Performance Document Details](#)

Evaluation Approval Chain

▼ **Doc ID: 61839;Pending**

Evaluation Approval Chain

Pending

Merideth Wakeman
ePerformance Approving Mgr

Comment

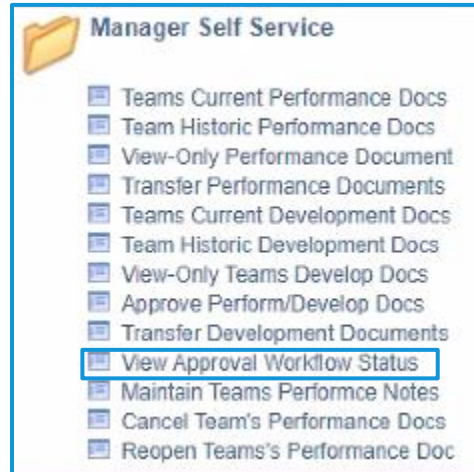
Approve Deny

Go To Approval Summary

Sit down together!

1. Once the second-level approver has approved the performance evaluation, the Manager will receive a notification.
2. You can view the comments and the Approval Status by navigating to the Manager Self-Service menu and selecting **View Approval Workflow Status**.

Enter the filter criteria for the document you are seeking. Select the appropriate document and then click on the arrow next to **Doc ID** to expand the box and view comments.



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

3. Manager and Employee meet to discuss the yearend appraisal. You will share the overall yearend appraisal and rating.
4. Once the meeting is complete, return to the document. Select the **Share with Employee** button in the top right, then **Confirm**.

[Return to Current Documents](#) |

Share with Employee



Share with Employee

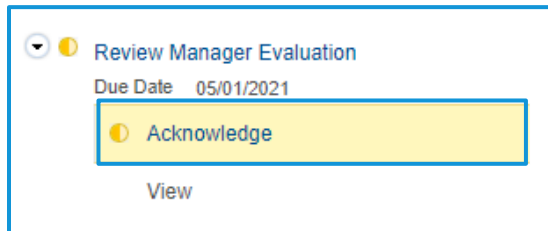
Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

Confirm

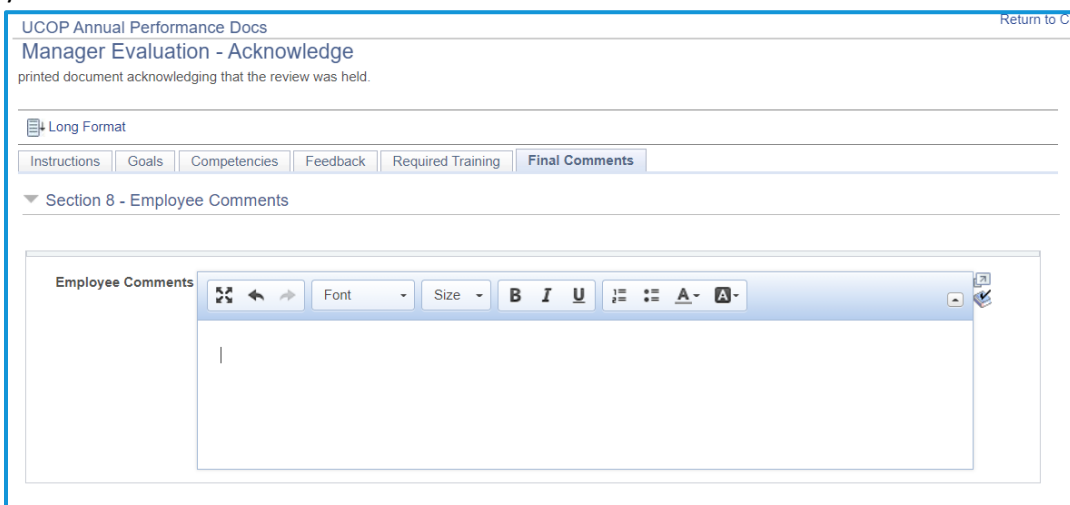
Cancel

Employee Acknowledgement

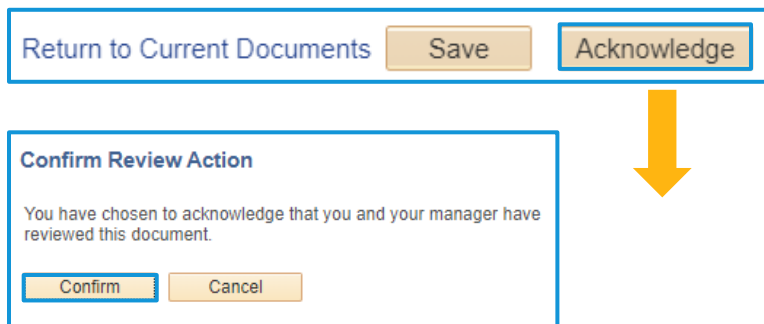
1. Return to your document within the system. Navigate to **Review Manager Evaluation** in the left-hand menu. Click **Acknowledge**.



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

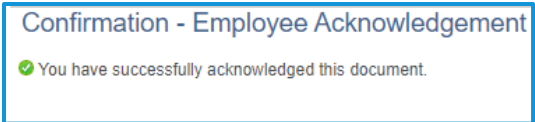


3. When you are finished entering your final comments, select the **Acknowledge** button in the upper right-hand corner. Select **Confirm**.



- 4. You will see a confirmation.

At this point, once you select **Return to Current Documents**, you will no longer have a current document to view.



- 5. You can access your past performance documents in the main **Performance Workcenter** page under **My Historical Performance Documents**.

