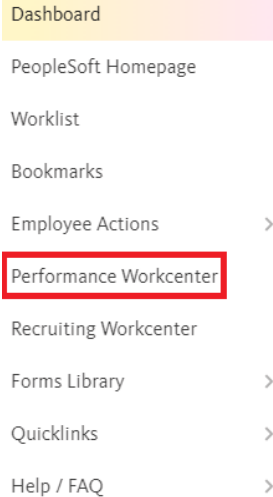


Annual ePerformance Document Walkthrough for Employees & Supervisors

How to Access the Current ePerformance Document

UCPath Dashboard



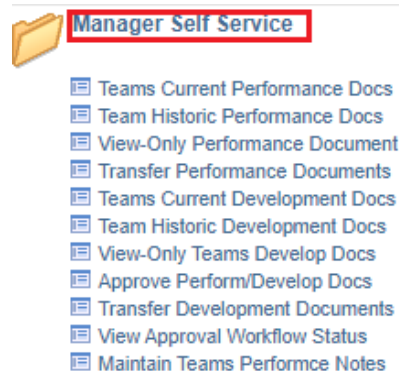
- Navigation: *UCPath Dashboard > Performance Workcenter > My Current Performance Docs*

Employee



- Employees can access their evaluations in the 'Employee Self Service' folder under "My Current Performance Docs"
- Select the UCSB Annual Review link from the available documents, and make sure you're selecting the correct evaluation year

Supervisor



- Supervisors can access their Team's evaluation documents in the 'Manager Self Service' folder under "Teams Current Performance Docs"

Annual ePerformance Document Walkthrough for Employees & Supervisors

Define Criteria (Due 1 month after evaluation cycle begins)

Overview: Once the document opens, you should see the Document Status at the top of the page. The Define Criteria step is the first step of the evaluation process and in a new document.

The **Goals** tab is mandatory for evaluation compliance. Entries on the Strengths, Responsibilities, or Development tabs are not required during this stage.

All Annual Documents will have 'Complete Mandatory Training' as the first **Goal**. Both employees and supervisors can enter goals in this step.

Employee:

The screenshot shows the 'Performance Process' interface for an employee. The 'Steps and Tasks' sidebar on the left lists: Define Criteria (Due Date: 03/31/2025), Check-in 1 (Due Date: 06/01/2024), Check-in 2 (Due Date: 09/01/2024), Finalize Criteria (Due Date: 03/31/2025), Complete Self Evaluation (Due Date: 03/31/2025), and Review Manager Evaluation (Due Date: 03/31/2025). The 'Define Criteria' step is highlighted. The main content area shows the 'UCSB Annual Review' document for LVD-Ellen LVD-Sandhar. The 'Goals' tab is selected, showing 'Section 3 - GOALS' with the text 'GOALS will be evaluated by: Employee, Manager' and a description about mandatory UC training. An 'Add Item' button is visible. The top right contains buttons for 'Return to Current Documents', 'Save', 'Print', 'Notify', and 'Export'.

Using the “**Add Item**” option under the Goals tab, enter in performance criteria for the year. Once you are ready for supervisor review, press “**Save**”.

Utilize the “Notify” button to draft an email notification to your supervisor signaling the document is ready for their attention.

Supervisor:

The screenshot shows the 'Performance Process' interface for a supervisor. The 'Steps and Tasks' sidebar on the left lists: Define Criteria (Due Date: 03/31/2025), Check-in 1 (Due Date: 06/01/2024), Check-in 2 (Due Date: 09/01/2024), Finalize Criteria (Due Date: 03/31/2025), Complete Self Evaluation (Due Date: 03/31/2025), and Review Manager Evaluation (Due Date: 03/31/2025). The 'Define Criteria' step is highlighted. The main content area shows the 'UCSB Annual Review' document for LVD-Ellen LVD-Sandhar. The 'Goals' tab is selected, showing 'Section 3 - GOALS' with the text 'GOALS will be evaluated by: Employee, Manager' and a description about mandatory UC training. An 'Add Item' button is visible. The top right contains buttons for 'Return to Current Documents', 'Save', 'Approve', 'Print', 'Notify', and 'Export'.

Once the employee has entered their information on the Goals tab, the supervisor will review and add any additional information. Select “**Save**” and “**Approve**” once you are ready to move the document onto the next stage.

Annual ePerformance Document Walkthrough for Employees & Supervisors

Check-In 1 (Due October 1st) & Check-In 2 (Due December 18th)

Overview:

Supervisor and employee meet to discuss progress of ePerformance Goals, areas of development, and review responsibilities for the remainder of the performance cycle. The steps for Check-In 1 and Check-In 2 are the same.

Employee:

The employee will add comments to the Goals added during the Define Criteria stage.

Once you have finished adding comments, press **"Save"** and **"Share with Manager"** to move to the Review Manager Comments Step.

Utilize the "Notify" button to draft an email to the supervisor to signify the document is ready for their attention.

Supervisor - 1st Step

After an employee has entered comments, the supervisor will have an opportunity to review, add comments, and share with the employee. Comments should be discussed between the supervisor and employee prior to moving the document to the next stage.

Press **"Save"** and **"Share with Employee"**.

Supervisor - 2nd Step

Once the employee has had a chance to review supervisor comments and the discussion has been completed, the supervisor will select **"Complete Check-In"** to move the document to the next stage: Check-In 2.

If you select **"Stop Sharing"**, the employee will no longer be able to see supervisor comments.

Annual ePerformance Document Walkthrough for Employees & Supervisors

Finalize Criteria (Due February 28th)

Overview:

The Finalize Criteria can be seen as the housekeeping step for supervisors. Commenting or making edits during this stage is optional and can be done by the employee or supervisor. The system requires supervisors to review and finalize the goals set during the Define Criteria stage.

If comments or goals are added, follow the steps above for Saving and Sharing with Manager/Employee.

Supervisor:

The screenshot displays the 'Performance Process' interface for a 'UCSB Annual Review'. The left sidebar lists the 'Steps and Tasks' with 'Finalize Criteria' highlighted. The main content area shows the 'Finalize Criteria' step with a 'Due Date' of 03/01/2025 and an 'Update and Complete' button. Below this, there are sections for 'Manager Comments' and 'Employee Comments'. The 'Manager Comments' section has a text area and a 'Save' button. The 'Employee Comments' section shows 'Employees comments are not shared'. At the top right, there are buttons for 'Save', 'Share with Employee', and 'Complete'. A purple box highlights the 'Finalize Criteria' step in the sidebar and the 'Update and Complete' button. Another purple box highlights the 'Save', 'Share with Employee', and 'Complete' buttons at the top right. A purple arrow points from the 'Update and Complete' button to the 'Complete' button at the top right.

Once you are ready to move on to the next stage or after comments are shared and reviewed, the supervisor will select **"Complete"**.

An auto-generated email will be sent to the employee upon completion of this step.

Annual ePerformance Document Walkthrough for Employees & Supervisors

Employee Self Evaluation and Manager Evaluation (Due March 31st)

Overview:

The last two stages of the Performance Evaluation cycle are the Employee Self-Evaluation and Manager Evaluation. For these stages, please utilize all of the tabs when entering information.

For the Manager Evaluation stage, it can be divided into 3 steps: Comments, Acknowledgment, and Completion.

After a document has moved through the final 2 stages to completion, the supervisor can utilize the **"Export"** function to download a Word Document. This can be added to the employee's file for compliance purposes.

Employee:

Performance Process

UCSB Annual Review

Self-Evaluation - Update and Complete

Employee ID: 10075420

Job Title: HR GENERALIST 2

Manager: LVD-Wyatt LVD-Ma

Period: 04/01/2024 - 03/31/2025

Document ID: 272362

Due Date: 03/31/2025

Save | Complete

Print | Notify | Export

Long Format

Strengths | Responsibilities | Goals | Development

Section 1 - EE's DEMONSTRATED STRENGTHS & ACCOMPLISHMENTS Summary

EE's DEMONSTRATED STRENGTHS & ACCOMPLISHMENTS Summary

Employee Comments

The employee will enter comments on all 4 tabs of the document to complete the Self-Evaluation.

After all comments have been entered, select **"Save"** and **"Complete"** to move the document to the Manager Evaluation Stage.

Supervisor - Share Comments

Performance Process

UCSB Annual Review

Manager Evaluation - Update and Share

Employee ID: 10075420

Job Title: HR GENERALIST 2

Manager: LVD-Wyatt LVD-Ma

Period: 04/01/2024 - 03/31/2025

Document ID: 272362

Due Date: 03/31/2025

Save | Share with Employee

Print | Notify | Export

Long Format

Strengths | Responsibilities | Goals | Development | Overall Rating

Section 5 - Overall Summary

Manager Rating: Successful

Manager Comments

Once the manager has reviewed employee comments, they will add their comments. Select **"Save"**, **"Share with Employee"**. The supervisor can also utilize the **"Notify"** button to draft an email to inform their employee that their document is ready for review.

Annual ePerformance Document Walkthrough for Employees & Supervisors

Employee Self Evaluation and Manager Evaluation (Due March 31st)

Supervisor - Request Acknowledgment

Performance Process

UCSB Annual Review

Manager Evaluation - Request Acknowledgement

LVD-Ellen LVD-Sandhar

UCSB Annual Review 04/01/2024 - 03/31/2025 Overview

Define Criteria Due Date 03/31/2024

Check-in 1 Due Date 03/31/2024

Check-in 2 Due Date 03/31/2024

Finalize Criteria Due Date 03/31/2025

Review Self Evaluation Due Date 03/31/2025

Complete Manager Evaluation Due Date 03/31/2025

Request Acknowledgement Pending Acknowledgement Complete

Job Title: HR GENERALIST 2

Document Type: UCSB Annual Review

Template: Perf Feedback v.2 CP NO MOM

Status: Shared with Employee

Manager: LVD-Wyatt LVD-Ma

Period: 04/01/2024 - 03/31/2025

Document ID: 273262

Due Date: 03/31/2025

Actions: **Request Acknowledgement** | Print | Notify | Export

Complete Manager Evaluation Due Date 03/31/2025

Update and Share

Request Acknowledgement

Pending Acknowledgement

Complete

EE's DEMONSTRATED STRENGTHS & ACCOMPLISHMENTS Summary

Manager Comments

After the employee has reviewed the supervisor's comments, the supervisor will then move to the acknowledgment step. Select **"Request Acknowledgement"** for an employee to acknowledge the Manager Evaluation prior to document completion.

Employee:

Performance Process

UCSB Annual Review

Manager Evaluation - Acknowledge

LVD-Ellen LVD-Sandhar

UCSB Annual Review 04/01/2024 - 03/31/2025 Overview

Define Criteria Due Date 03/31/2024

Check-in 1 Due Date 03/31/2024

Check-in 2 Due Date 03/31/2024

Finalize Criteria Due Date 03/31/2025

Complete Self Evaluation Due Date 03/31/2025

Review Manager Evaluation Due Date 03/31/2025

Acknowledge View

Job Title: HR GENERALIST 2

Document Type: UCSB Annual Review

Template: Perf Feedback v.2 CP NO MOM

Status: Pending Acknowledgement

Manager: LVD-Wyatt LVD-Ma

Period: 04/01/2024 - 03/31/2025

Document ID: 273262

Due Date: 03/31/2025

Actions: **Acknowledge** | Save | Print | Notify | Export

Review Manager Evaluation Due Date 03/31/2025

Review with Manager

Acknowledge

View

Manager Rating: Successful

Manager Comments

The employee will review supervisor comments added during this stage, and once complete, they will select **"Acknowledge"**.

Supervisor - Completion

Performance Process

UCSB Annual Review

Manager Evaluation - Complete

LVD-Ellen LVD-Sandhar

UCSB Annual Review 04/01/2024 - 03/31/2025 Overview

Define Criteria Due Date 03/31/2024

Check-in 1 Due Date 03/31/2024

Check-in 2 Due Date 03/31/2024

Finalize Criteria Due Date 03/31/2025

Review Self Evaluation Due Date 03/31/2025

Complete Manager Evaluation Due Date 03/31/2025

Complete

Job Title: HR GENERALIST 2

Document Type: UCSB Annual Review

Template: Perf Feedback v.2 CP NO MOM

Status: Acknowledged

Manager: LVD-Wyatt LVD-Ma

Period: 04/01/2024 - 03/31/2025

Document ID: 273262

Due Date: 03/31/2025

Actions: **Complete** | Return to Current Documents | Print | Notify | Export

Complete Manager Evaluation Due Date 03/31/2025

Update and Share

Request Acknowledgement

Pending Acknowledgement

Complete

Employee Data

Employee ID: 10075420

Department: PEERS

Plan/Grade: CTSS 20

Step: 0

Rating History

Long Format | % Responder

Strengths | Responsibilities | Goals | Development | Overall Rating

Section 5 - Overall Summary

Manager Rating: Successful

Manager Comments

Section 7 - Employee Comments

Once the employee has acknowledged the documents, the supervisor can proceed with completing the document. Select **"Complete,"** and that will finalize the evaluation cycle.

A confirmation window should appear, as well as removing the document from the *"Teams Current Performance Docs"* folder.

Annual ePerformance Document Walkthrough for Employees & Supervisors

For questions or concerns regarding ePerformance documents, please submit a ticket to ucsb.service-now.com/hr by navigating HRIS > ePerformance Questions.