

Tips for 2020-2021 Performance Evaluations

Navigate to 2020-2021 Performance Evaluation:

Once you receive the email that an evaluation has been created, you can follow the link given in the email to access the evaluation, or you can look at all evaluations assigned to you directly in UCPATH. To access performance evaluations through UCPATH, please take the following steps:

1. Go to <https://ucpath.universityofcalifornia.edu>
2. Log in with your CruzID and gold password
3. In the left navigation panel, click Performance Workcenter
4. Under the Manager Self Service section, click on the Teams Current Performance Docs link

Define Criteria and Goals:

Once an evaluation has been created, the supervisor should go in and define the criteria against which you wish to evaluate your employee. Both the supervisor and the employee are able to add and edit criteria during the Define Criteria step. It is up to the supervisor whether or not they would like to collaborate with the employee at this step in the process.

Criteria should include general job duties on the Functions tab, and any goals you have set for your employees for 20/21 on the Goals tab. This will allow your employee to see what they will be evaluated on early in the performance cycle.

Don't Approve Your Criteria Yet:

You do not need to Approve the criteria at this time. We recommend waiting to approve the criteria until the end of the performance cycle when you are ready for your employee to start their self-evaluation. By not approving the criteria now, you grant yourself the ability to add, remove and update criteria as needed throughout the year.

Save Your Work Often:

Be sure to close any UCPATH tabs in your browser that you are not actively using. Inactivity in these other tabs may result in you being logged out of UCPATH. Be sure to save your work often. If you don't click the yellow 'Save' button in the upper right corner, your criteria will be lost.

Performance Notes:

Performance Notes allows supervisors to document and employee's performance throughout the performance period.

As performance evaluations are created at the beginning of the performance period, supervisors can use Performance Notes throughout the performance period to document their employee's performance and progress.

Supervisors can then use these notes as reference when completing a Performance Evaluation.

Navigate to Performance Notes:

UCPATH→Performance Workcenter→Maintain Teams Performance Notes

Performance Notes - Navigation

The screenshot shows the Oracle Performance Workcenter interface. On the left is a navigation sidebar for user Nico Feria. The main content area is divided into 'Employee Self Service' and 'Manager Self Service'. A red arrow points from the 'Performance Workcenter' link in the sidebar to the 'Maintain Teams Performance Notes' link in the 'Manager Self Service' section.

Supervisors can search for existing performance notes by employee ID and date range, or they can add a new note

Performance Notes

Instructions

Enter the Employee ID of the subject employee in the search criteria, then select the **Search** button. (This list can be filtered further by entering a "Starting Date").

New notes can be added and existing notes can be edited. To add a new note, select on the **Add New Note** button. To edit or access the details of an existing note, select on the note's subject.

Selection Criteria

*Employee ID Peppermint, Patty

Notes From

Through

There are no existing notes for the specified selection criteria.

[Return to Performance Document](#)

Define Criteria – Performance Notes

- Performance Notes consist of a Subject and Note Text
- When viewing an existing performance note, supervisors can edit or add to the note

The screenshot shows the 'Performance Notes - Add/Update Notes' form. It includes fields for Employee ID (12345678), Subject (Cupcake club management), and Note Text (Peppermint Patty has been extremely proactive in managing the cupcake club's expenses and revenue, providing unsolicited weekly reports and evidence-based directive suggestions). A 'Save' button is located at the bottom of the form.

Navigate to Employee's Historical Performance Documents:

1. UCPath → Performance Workcenter → Manager Self-Service → View-Only Performance Docs
 - This will list the employees under the supervisor's purview.
 - Click "SELECT" next to the employee's name to view the historical performance documents under this employee.

Last Updated 12.2.2020