EPAR User Guide for an EMPLOYEE

Table of Contents
Accessing the Application .................................................................................................................................... 1
Employee Role .............................................................................................................................................. 1
Process Overview .......................................................................................................................................... 1

Filling Out Your Summary of Accomplishments .................................................................................................... 2
How to Begin ...................................................................................................................................................... 2
How to Copy Last Year’s EPAR Goals to Your Summary of Accomplishments (SOA) ............................................................... 4
How to Edit an Entry ......................................................................................................................................... 5
How to Add a New Entry ................................................................................................................................... 6
How to Add Future Goals to Your SOA ............................................................................................................... 8
How to Delete an Entry ....................................................................................................................................... 9
Previewing your SOA ...................................................................................................................................... 9

Completing the EPAR Review Process ........................................................................................................... 11
For Employees - Review and Signature Process .............................................................................................. 12
Accessing the Application

To complete the EPAR or Summary of Accomplishments (SOA) select the link below:  http://epar.ucdavis.edu

This application requires CAS authentication. If you are a new employee, you will not have access to the system until your supervisor sets you up and you receive notification to begin your SOA for the current year.

Employee Role

Employee(s)

Once you are set up in the EPAR application, you will have the opportunity to fill out your Summary of Accomplishments.

Process Overview

The graphic above displays the basic EPAR process. First, the Supervisor sets up a single or several employees in a setup. Instructions for this are available in the Employee Setup section. Next, each employee fills out and submits their Summary of Accomplishments by following the directions in the Filling out Your Summary of Accomplishments section. Then, the supervisor completes the EPAR.
Filling Out Your Summary of Accomplishments

How to Begin
You will receive an email notification with a deadline for completing your SOA. The link in the email will display the page below after have logged in. You can enter the EPAR at any time prior to receiving your notification as long as your supervisor has set you up in the system. In addition to using the link in the email notification, you can also access the EPAR application directly off the HR home page or by typing in http://epar.ucdavis.edu in your web browser.

Select the link that says Enter the EPAR System to begin your SOA for the current year.

On the EPAR Management screen (shown below), select View SOA/Appraisal to open the SOA screens. If no SOA/Appraisal is available for the current year you should contact your direct supervisor and make sure they have set you up properly in the system.
When you enter the EPAR application for the first time, the SOA page (shown below) will be displayed. Notice that the first tab displayed is the **Part I – Last Year’s Performance** tab.

On the **Part I – Last Year’s Performance** tab you will need to add any Job Functions, Goals, or Achievements you have completed. If you are entering a Job Function, Goal, or Achievement the form is set up to enter one item at the time. To save data entry, most people begin this step by copying goals they set with their supervisor the previous year.
How to Copy Last Year’s EPAR Goals to Your Summary of Accomplishments (SOA)

Part of the previous year’s appraisal process included working with your supervisor to establish goals for the next appraisal period. You should address these goals as part of completing your current year’s SOA. You can avoid having to retype these goals by copying them from the previous EPAR. To do this, select the **Copy Last year’s Goals** button. The button is available only if the previous year’s EPAR was completed.

You will be presented with a pop-up (shown below). Select OK to proceed with the copy.

The newly added entries will be displayed in a grid below the buttons on the bottom of the page (as seen below). Notice the column labeled “Copied”. The Yes in this column indicates that these items have not changed since copying occurred. When you save an entry, which you have edited, the Copied column will display No for that entry. You will need to be update or edit each goal with comments on your performance over the past year before you can move on to Part II.
How to Edit an Entry

Once you have copied goals from last year’s EPAR you will need to edit each entry to add comments on your performance for that entry. This is also your opportunity to edit the description if the scope or details of an entry have changed over the course of the year. Select View/Edit to display the entry you wish to edit.

Follow these steps to update the entries:

1. Update the description if necessary.
2. Select one or more demonstrated competencies you think you exhibited.
3. Add Supporting Comments.
   
   **Note:** Supporting comments should provide the detail and/or context that explain the significance of that particular item (Job Function, Goal, or Achievement)

4. Save your entry
NOTE: Make sure you hit the Save button when you complete your entry!
How to Add a New Entry

Select the Add New button to add a new entry of your own to your SOA. This will then display a new blank entry for you to fill in. Follow these steps to complete the entry:

1. Choose the type of entry. (Job Function, Goal, or Achievement)
2. Add a description for the entry.
3. Choose any demonstrated competencies.
4. Add Supporting Comments.

**Note:** Supporting comments should provide the detail and/or context that explain the significance of that particular item (Job Function, Goal, or Achievement).

5. Save your entry.

Each step is identified in the image shown below.

1. Choose type of entry
2. Add the description
3. Choose any Demonstrated
4. Add supporting comments
5. Save your entry
How to Add Future Goals to Your SOA

The Future Goals section of your SOA is accessible by selecting the **Part II – Future Goals** tab (see below). Here you have the opportunity to suggest “Future Goals” to your supervisor for the coming appraisal period.

You can add multiple goals one at a time. Make sure to save your entry using the **Save** button, and the **Add New** button to add each new goal. Your supervisor can later choose copy these goals and include them in the EPAR for discussion with you. The buttons on this page work the same as they did in Part I of your SOA.
How to Delete an Entry
There may be entries, which you add to your SOA, that you no longer want to include or you may accidentally add duplicate entries that you wish to delete. Selecting the Delete link next to the entry in the grid that you want to remove will delete that entry.

<table>
<thead>
<tr>
<th>View/Edit</th>
<th>Type</th>
<th>Description</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Edit</td>
<td>Goal</td>
<td>Goal From Last Year</td>
<td>Comments that describe performance.</td>
</tr>
<tr>
<td>View/Edit</td>
<td>Goal</td>
<td>Another Goal From Last Year</td>
<td>Comments that describe performance.</td>
</tr>
</tbody>
</table>

In case you accidentally selected to delete an entry you will be prompted to confirm your decision. Be careful because deleted entries cannot be recovered. To confirm deletion select OK.

Previewing your SOA
To preview your entire SOA select the Preview Entire Document tab at any time.

This will generate a PDF preview in another window which you can review, save, and/or print. This tab is available at times. Here is a sample of the PDF which is generated:
Note: If you have problems viewing the PDF and you are using Google Chrome as your browser try disabling both the Chrome PDF plug-in and the Adobe PDF plug-in (This is a known Google Chrome issue). If you are using Safari on a Mac there can be a long delay, wait for one minute if you still cannot see the PDF try using Firefox instead. If neither situation apply to you, check your browser settings or re-install Adobe Acrobat Reader for your browser.
Completing the EPAR Review Process

Submitting your SOA

You should submit your SOA to your supervisor on or before the deadline stated in the electronic notification. To submit your SOA select the **Submit to Supervisor** tab (shown below).

Once you have “submitted” the SOA it is considered final, and you will no longer be able to edit the document. If you would like to share a draft of the SOA before “submitting” it, you will need to do this outside the EPAR system by providing a hard copy to your supervisor to review. See the previous section titled *Previewing your SOA* for instructions.

You will be prompted to confirm this choice. Select OK to confirm.
For Employees - Review and Signature Process

You will receive a notification when your supervisor has signed and submitted your final EPAR for your review and signature. After notification, you will need to enter the EPAR application and select the Overall Rating & Signatures tab (see below).

On the page displayed above, follow these steps:

1. Add any final comments (optional).
2. Electronically sign your EPAR by checking the signature box.
3. Select the Submit to Supervisor button.

If you do not have time to complete your comments and want to return later to submit your EPAR make sure you save your comments by selecting the Save button. Do not select the Submit to Supervisor button until you are ready for final submission.