Understanding the evaluation process

Below are the high-level activities that take place before and during each evaluation period.

**HR Administration**
(2 weeks prior to cycle)

• Sends communication to all supervisors participating in the cycle
• Answers business and process-related questions

**HR Administration**
(Start of cycle)

• Creates supervisor and employee performance documents in eHR for the current evaluation cycle

**eHR**
(Start of cycle)

• Sends out automatic notifications to supervisors and employees that performance documents have been created

**Supervisor and employee**

• Supervisor notifies participating employees to complete their self-assessment and future goals
• Employees log into eHR and complete self-assessment and future goals
• Supervisor completes final evaluation and reviews with employee
• Departments monitor process through eHR ePerformance reports

**HR Administration**
(Cycle review)

• Monitors process through reports
• Communicates upcoming due dates to departments
• Answers business and process-related questions
**General Overview**

Below are some terms for reference while going through this document and the evaluation process:

<table>
<thead>
<tr>
<th>Employee(s)/Direct Report(s)</th>
<th>The person or people being evaluated</th>
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<tbody>
<tr>
<td>Supervisor/Manager</td>
<td>Person to whom the employee being evaluated reports to in the HR system of record</td>
</tr>
<tr>
<td>Evaluator</td>
<td>Person who owns the employee’s review in eHR. May or may not be the employee’s supervisor or manager</td>
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<tr>
<td>Performance Evaluation</td>
<td>Terms interchangeably used as reference to the main document that contains all of the information relevant to the employee’s performance</td>
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<tr>
<td>Performance Review</td>
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<td>Performance Document</td>
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**Step 1**

The HR Administrator sends a communication to supervisors with participating employees two weeks prior to the beginning of each cycle. The communication will include relevant information that will assist supervisors/evaluators in preparing for the upcoming cycle.

**Step 2**

The HR Administrator creates the supervisor and employee performance documents in PeopleSoft and notifies supervisors that the evaluation cycle has begun. A PeopleSoft notification will also be sent to all participants (supervisors and employees) when the documents have been created.

**Step 3**

The supervisor may decide to evaluate the employee or transfer the document to an alternate evaluator. All evaluators must be classified as a supervisor or manager in PeopleSoft. Exceptions are faculty wishing to evaluate their staff employees.

**Step 4**

The evaluator notifies participating employees to complete their self-assessment and future goals.
Step 5

Each employee completes their self-assessment and future goals and submits to their evaluator through PeopleSoft (review the Employee Toolkit for further details on this action)

Employees can access their version of the evaluation through PeopleSoft > Main Menu > Employee Self-Service > Performance Management > Performance Documents.

Note: Employees who do not have a UCDHS computer account and cannot get PeopleSoft access should meet with their evaluator to discuss the best method of providing a self-assessment and future goals.

Step 6

The evaluator completes the official review, incorporating the employee’s self-assessment and future goals as appropriate.

Employee self-assessment comments can be viewed by clicking on the View Employee Self-Appraisal link where it is available.
Step 7

The evaluator enters the Overall Performance Rating for each employee and saves the document.

Step 8

The evaluator meets with each employee to discuss their performance and accomplishments during the past year. At this time, the evaluator will also provide the employee with their Overall Rating.

Step 9

The evaluator then releases the performance evaluation to each employee by selecting the Release to Employee button
**Step 10**

The employee can review the entire performance document, add comments and acknowledge that they have had the opportunity to review the evaluation.

For employees without a UCDHS computer account and no PeopleSoft access, the evaluator can provide the employee with a printed copy of the evaluation.

**Step 11**

The evaluator submits the evaluation to the next level of management for approval. Manager/Senior Professional and Practice Manager evaluations do not require additional approval and can be marked as Complete after acknowledgment.

**Step 12**

The HR Administrator monitors the process throughout each cycle to ensure evaluations are being completed on schedule and answers business and process questions.

**Questions?**

If you have questions about the performance management process or the online forms, please contact the support desk at: hs-evaluations@ou.ad3.ucdavis.edu