eHR ePerformance
User Guide for Evaluators
Introduction to eHR ePerformance

eHR ePerformance is a web-based, self-service, performance management solution that streamlines the performance review process. Managers and employees can collaborate on performance evaluations, managers and HR Administrators can review performance, and monitor and manage the overall performance process. Automated e-mail workflow notifications keep all interested parties up-to-date throughout the performance cycle.

Terms and Symbols

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔍</td>
<td>Opens lookup page</td>
</tr>
<tr>
<td>✅</td>
<td>Spell check</td>
</tr>
<tr>
<td>⌚</td>
<td>Opens calendar prompt</td>
</tr>
<tr>
<td>OK</td>
<td>Accepts entry on page</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels entry on page</td>
</tr>
<tr>
<td>Continue</td>
<td>Continue on to the next page</td>
</tr>
<tr>
<td>📡 Save</td>
<td>Save a page</td>
</tr>
<tr>
<td>🔍 Return to Search</td>
<td>Return to search list</td>
</tr>
<tr>
<td>🔍 Search</td>
<td>Initiates search</td>
</tr>
</tbody>
</table>

- **Employee(s) / Direct Report(s)**: The person or people who are being evaluated.
- **Performance Evaluation**: Terms interchangeably used as reference to the main document that contains all the information relevant to the employee’s performance.
- **Performance Review**
- **Performance Document**
- **Template**: All performance evaluation documents are generated from templates. A template defines the sections that are included in a performance review document, and the processing and usage rules.
General Information and Instructions

At the beginning of each performance evaluation cycle, you will receive an automated email notification from the eHR system informing you that performance documents have been created for your employees.

This automatic notification is to alert you that the HR Department has created evaluation forms for your team for the performance evaluation period beginning May, 2011 and ending April, 2012. You may click on this link to access the forms for your team:


Evaluation forms were successfully created for the following employees:

Daffy Duck  
Mickey Mouse  
Thomas Edison

Performance documents are initially created by HR Performance Administrators. If you have any questions regarding the process, please send an email to with your question to HSEvaluations@ucdmc.ucdavis.edu.
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Getting Started with ePerformance

1. Log in to eHR at [http://eHR/psp/hrprod/EMPLOYEE/HRMS/?cmd=login](http://eHR/psp/hrprod/EMPLOYEE/HRMS/?cmd=login)

2. Enter your eHR User ID and Password (same as UCDHS computer account)

3. Click the ‘Sign In’ button
Locating the ePerformance Module

- Navigate to Main Menu > Manager Self Service > Performance Management.

Accessing Performance Documents

- Click the 'Maintain Documents' link to access performance documents you own.
The Employee Self-Appraisal Document

- The employee self-appraisal, indicated by Employee in the Author Type column, is available for you to view, but is read-only.

- Select the hyperlinked employee name to view the document.

### Employee Self-Appraisal Due Dates

#### Performance Document

- **Document Type:** Non-Rep 2013 Performance
- **Author Type:** Employee
- **Author:** Snow White
- **Begin Date:** 07/01/2012
- **End Date:** 06/30/2013
- **Job Title:** HR Analyst I
- **Document ID:** 19755
- **Template ID:** PSS
- **Employee ID:**
- **Due Date:** 07/31/2013
- **Document Status:** In Progress

### Notes:

- When documents are initially created by HR, the due date of the employee self-appraisal is the same as the due date for the supervisor document.

- To alter the due date of the employee self-appraisal, read the section on changing the document due date.

- Only HR can alter the due date of the manager document.
Performance Documents That You “Own”

Maintain Documents
Listed below are the performance documents that you “own”. To filter this list, enter a Document Type, Earliest End Date and/or Author Type in the "Search Criteria" box, then click on the "Refresh" button.
To access a particular author’s portion of one of these documents, click on the document’s “Author” hyperlink.

Search Criteria

<table>
<thead>
<tr>
<th>Document Type:</th>
<th>Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Earliest End Date</th>
<th>Author Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Select your name under the Author column, where Author Type is Manager, to access a document and begin the evaluation process.

Notes:

Documents that you “own” refers to performance documents that have been created by HR and assigned to you or documents that have been transferred to you.

- The supervisor document is indicated by Manager in the Author Type column.
- To filter the list, enter a Document Type, Earliest End Date and/or Author Type in the "Search Criteria" box, then click on the "Refresh" button.
- The employee self-appraisal document is indicated by Employee in the Author Type column.

Tip: Filter the list by evaluation cycle and manager documents only. The employee self-appraisal can be viewed from within the manager document.
Performance Evaluation Sections

Note: The performance evaluation sections available to you may vary depending on the job classification of the employee being evaluated. The sections shown below are from the Non-Represented employee performance evaluation.

- Select **Expand All Sections** to open the evaluation sections
- To expand or minimize individual sections of an evaluation, click on the triangle.

![Performance Evaluation Document](image)

![Employee Self-Assessment](image)
Employee Self-Assessment

- Select the View Employee Self-Appraisal link to view performance and accomplishments results from the employee self-appraisal.

- You may also add your own items into the comments box relating to employee accomplishments from the past year.
Performance Competencies

- Enter a rating for each competency as it pertains to employee performance and accomplishments.
- Select *Not Applicable* if the competency does not relate to the employee’s position and/or duties.
Mandatory Training

- Select Yes or No indicating if the employee has completed the listed Mandatory Training courses
- Each employee is required to complete Safety Training and Privacy and Security Training each year
- Supervisors and Managers are also required to complete Sexual Harassment Prevention Training every two years. N/A is available as a selection for employees who are not in a supervisory position.
**Patient Care**

If the employee is responsible for human patient care, enter evaluation information for each applicable population type in the comments box, as appropriate.

**Manager Action:** Complete this section only for individuals with responsibility for human patient assessment, treatment or care. Please comment on the age group(s) served if the individual has responsibility to assess, treat or care for patient populations.

**Age Guidelines:**
- Infants (0 - 12 months)
- Children (12 months - 15 1/2 years)
- Adolescents (16 / 18 years)
- Adults (18 - 64 years)
- Geriatrics (65 years and older)

**Comments:**

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**Focus for Next Review Period**

Identify the area in which you would like the employee to focus and improve upon during the upcoming year.

**Future Focus:** I recommend the employee focus on the following:

**Select One:**
- Communication
- Decision Making
- Health and Safety
- Leadership
- Managing People
- Principles of Community
- Problem Solving/Innovation
- Quality Improvement
- Service Focus
- Stewardship
- Strategic Planning
- Teamwork
Future Goals and Expectations

- Enter future goals/expectations in this section. It is recommended that each employee have three (3) goals for the upcoming review period.

- Click “View Employee Self-Appraisal” link to view the employee’s goals from the self-appraisal.

Supervisor/Manager Comments

- Any additional comments on employee performance can be entered in this section.
Employee Comments

- No action is required for this section.
- Once the employee has reviewed the evaluation and acknowledged it, you will be able to view any comments the employee has entered.

Overall Summary

- Select the appropriate rating from the selection menu

Note: A rating must be selected before the evaluation can be made available to an employee. It cannot be left blank.
Check Language Functionality

**Step 1:** Click the **Check Language** button

![Check Language button](image1)

**Step 2:** Review the suggested changes and accept or decline

![Check Language window](image2)

- **Click “Change” to make changes or “Ignore/ Ignore All/Close” to return to previous screen.**
Schedule a Meeting with Employee

Once you have completed the performance evaluation, save it and schedule a meeting with the employee to review the performance evaluation.

After the review has been held, you can make any agreed upon changes to the performance evaluation document as needed.

Release to Employee

- Select the *Release to Employee* button to make the evaluation available to the employee.
- This allows the employee to review the evaluation, add comments and acknowledge.


**Acknowledge Review**

After the employee acknowledges the review was held, you will receive an email notification of the acknowledgment.

**Note:** If the employee does not want to or is unable to acknowledge the review, follow the instructions below to acknowledge in place of the employee.

Navigate back to the document, open it and click ‘**Acknowledge Review**’.

- Select the reason why you are acknowledging the review in place of the employee
- Click the “OK” button to complete the process.
Submit for Approval

- Submit the performance evaluation to next-level management by selecting the ‘Submit for Approval’ button.

  Note: MSP evaluations do not require additional approval and will have a Complete button only.

  ![Overall Summary](image)

  Save for Later  Submit for Approval

  [Return to Performance Document Selection](link)

- Click the “Submit” button to finalize the submission process.

  ![Maintain Performance Document](image)

  Submit for Approval

  Mickey Mouse

  You have chosen to submit the performance document for approval. To confirm that you would like to submit the performance document for approval, click the Submit button.

  Do not submit this document until you have completed each section. Once you click Submit the document will be routed through the approval process to the appropriate individuals. You will then be notified through email on the approval status.

  [Submit] [Cancel]

  Note: Evaluations for PSS employees who report directly to an Associate Director, or Dept Manager in the Schools of Health, will have a Submit for Approval button but will be approved automatically and will not require additional approval.
View Approval Status

- Once the performance evaluation has been submitted for approval, you can check the status through the ePerformance View Approval Status feature.

- Navigate to Performance Management > View Approval Status to view the status of a performance evaluation pending approval.
Tracking Performance with Performance Notes

- Click the ‘Maintain Performance Notes’ link to add a new note or to view existing notes.

- Enter the eHR Employee ID of the employee in the search criteria box or perform an advanced search by clicking the magnifying glass.

- Click the “Add New Note” button to add new note.
• Enter your notes in the comments box and click the "Save" button to save the note.

![Performance Notes Detail](image)

• Click "Edit Note" to edit a note.

![Search Criteria](image)

**Note:** Your performance notes are private and cannot be viewed by the employee.
Adding Performance Notes to an Evaluation

- To view existing notes for the employee you are currently evaluating, click the ‘Performance Notes’ link, located at the bottom of an open evaluation.

You have the option to limit the note selection by *Earliest Note Date*
- You can highlight and copy the text you wish to use in the performance document.
- Click *Cancel* to return to the open performance document.

**Maintain Performance Notes**

Snow White

Listed below are the performance notes you have recorded for this employee. To limit this list to more recent notes, enter a Starting Date in the *Search Criteria* box, then click on the "Refresh" button.

To edit or access the details of a note, click on the note’s "Edit Note" button.

**Search Criteria**

<table>
<thead>
<tr>
<th>Employee ID:</th>
<th>White, Snow J</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earliest Note Date:</td>
<td>30</td>
</tr>
</tbody>
</table>

**Performance Notes**

11/18/2011 12:51PM performance note for Snow White

**Cancel**  **Refresh**
Changing the Status of an Evaluation

- Once a document status has been changed to *Reviewed with Employee* or *Acknowledged*, you can no longer make edits to the content.

- If you wish to make changes to a document that is no longer *In Progress*, select *Change Document Status*.

- Select the document you wish to modify and click *Save* to change the document status back to *In Progress*.

**Note:**

- You can only change the status of a document that is in *Reviewed with Employee* or *Acknowledged* status.

- A document that is pending approval or complete can only be reopened by an HR Administrator.
Changing the Due Date of an Evaluation

- If desired, you can change the due date of the employee self-appraisal document. Only an HR Administrator can change the due date of the supervisor document.

- If you wish to change the due date of an employee self-appraisal, select *Change Document Due Date*.

- Select the document you wish to change, enter the new due date and click *Save*.
Transferring an Evaluation to another Supervisor

- If you wish to transfer an evaluation to another supervisor, select the *Transfer Document* link.

- Select the document you wish to transfer, enter the receiving supervisor's eHR ID and click *Save*.

- You may also select the magnifying glass to perform an advanced search on employee name.

### Transfer Document

<table>
<thead>
<tr>
<th>Employee</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Document Type</th>
<th>Document Status</th>
<th>Author</th>
<th>Author Status</th>
<th>Employee Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>White, Snow J</td>
<td>12/08/2011</td>
<td>12/08/2011</td>
<td>May 2012</td>
<td>InProgress</td>
<td>Charming, Prince</td>
<td>InProgress</td>
<td>Admin/Coordinator Officer</td>
</tr>
</tbody>
</table>

You have chosen to transfer the document indicated above to another manager. Enter the receiving manager’s Employee ID in the box below, then click the *Save* button to complete the transfer.
Viewing Evaluations for Direct Reports

Managers and supervisors can view read-only versions of the most recent evaluations for their direct reports. This is especially useful if a manager/supervisor has transferred an evaluation to an alternate evaluator and employee documents are no longer available in the Maintain Documents section.

- Go to Performance Management > View Performance Documents.

- To view the most recent performance document for a direct report, click the View Performance Document link for that employee.

- To view performance evaluations for employees who report to your supervisors, select the org chart icon to drill down to the next level.

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Department</th>
<th>Employee Class</th>
<th>View Performance Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>ResPhysSub</td>
<td>CIFellows</td>
<td>Academic</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>ResPhysSub</td>
<td>CIFellows</td>
<td>Academic</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>Manager</td>
<td>Human Res</td>
<td>Career</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>Manager</td>
<td>Human Res</td>
<td>Career</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>Manager</td>
<td>AA</td>
<td>Career</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>HRAnlstVII</td>
<td>Human Res</td>
<td>Career</td>
<td>View Performance Document</td>
</tr>
<tr>
<td>Manager</td>
<td>WCProgram</td>
<td>Career</td>
<td>View Performance Document</td>
</tr>
</tbody>
</table>