

March 2, 2022

TO: Campus Community (DList)

FR: Lisa Romero, Interim Director, Human Resources

RE: ePerformance Evaluation Cycle for Policy-Covered Employees

******This message is being sent to the dlistserv on behalf of UCSB's Human Resources Department. Please do not reply to this message.******

We are fast approaching the end of our first year of the new ePerformance Evaluation cycle. The cycle began on April 1, 2021 and is set to end on March 31, 2022. By now, you should have completed steps 1 and 2 and be ready to embark on steps 3 - 5 of the ePerformance Evaluation cycle.

- [Step 1: Define Criteria \(Goal Setting\)](#)
- [Step 2: Track Progress \(Performance check-in's 1 and 2\)](#)
- [Step 3: Finalize Criteria](#)
- [Step 4: Evaluation in Progress](#)
- [Step 5: The Approval Process](#)

NEXT STEPS FOR MANAGERS AND SUPERVISORS:

- [Step 3: Finalize criteria](#) - This is considered a supervisor's 'housekeeping' step.
 - Supervisor selects "Finalize Criteria," completing this phase. Adding goals/comments is neither expected nor required at this late stage of the performance evaluation cycle. The system notifies the employee that "Performance Criteria is complete."
 - The Self Evaluation and Manager Evaluation are now open and accessible.
 - No action is required by the employee.
- [Step 4 - Evaluation in Progress](#) - Supervisor enters the evaluations of their employees into ePerformance by March 31, 2022, or soon after.
 - Please remember to save the document regularly so as not to lose your work.
 - Or, you can create the final evaluation in a google or word document and cut and paste it into ePerformance.
- [Step 5: The Approval Process](#) - Be sure to follow the steps below in order to bring your team's performance evaluations to a completed status. The full description of these steps can be found on the [Performance Development](#) section of the HR website.
 - SUPERVISOR submits employee evaluation for Manager Approval.
 - MANAGER reviews and clicks "approve" on the Performance Document adding comments if needed.
 - **SUPERVISOR clicks "share with employee" and meets with the employee to discuss the evaluation.**
 - SUPERVISOR clicks "request acknowledgment" on the employee evaluation.
 - EMPLOYEE clicks "acknowledge" on their evaluation (see Next Steps for Employees below).

- SUPERVISOR clicks "complete" on the employee's evaluation.

Once these steps are completed, the evaluation is finished and you can begin planning for the next ePerformance evaluation cycle which goes from April 1, 2022 through March 31, 2023.

NEXT STEPS FOR EMPLOYEES:

- [Step 4 - Evaluation in Progress](#) - Employee enters their self-evaluation into ePerformance. The ePerformance system reflects a due date of March 15th however we understand that employees may want to wait until the end of the actual performance cycle to complete their self-evaluation.
 - Please remember to save the document regularly so as not to lose your work.
 - Or, you can create the final evaluation in a google or word document and cut and paste it into ePerformance.
- [Step 5: The Approval Process](#) - After supervisor and employee meet to discuss the evaluation, employee clicks on "acknowledge" to complete their part of the evaluation process.

ADDITIONAL RESOURCES AND FAQs:

- Have questions regarding performance development?
 - Review the resources on the [HR Performance Development](#) website
- Questions regarding how to use the ePerformance module?
 - For Managers: [ePerformance for Managers](#)
 - For Employees: [ePerformance for Employees](#)
- Need a demonstration of how to define criteria or conduct check-ins?
 - Check out the [recorded demonstrations](#)
- Has an employee transferred into your department during the ePerformance evaluation cycle?
 - Confirm that the 'reports to' field on the position in UCPath is up-to-date.
 - Submit a ServiceNow ticket via ucsb.service-now.com/hr > [Position Management/Workforce Administration > ePerformance Questions](#) requesting that HR transfer the evaluation document to the new supervisor.

THE NEXT PERFORMANCE EVALUATION CYCLE - 2022/23

A communication regarding the next performance evaluation cycle will be forthcoming in April 2022.

QUESTIONS

If you have any questions, please submit a ServiceNow ticket to the ePerformance Administrator at ucsb.service-now.com/HR > [Position Management/Workforce Administration > ePerformance Questions](#).

Thank you.