Performance Evaluation Portal: Employee and Supervisor Guide

The performance evaluation (PE) process is an opportunity for employees and supervisors to engage in constructive conversations to support the job performance and development of the employee. The PE portal was designed to facilitate this process. The PE process on the portal has 5 steps:

1) Employee submits optional self-assessment and/or draft of the employee development plan.
2) Supervisor completes supervisor portion of the PE and meets with the employee to discuss the PE and the employee development plan.
3) Employee completes optional employee section and signs (or declines to sign) the PE.
4) Supervisor reviews employee section and signs the PE.
5) Unit manager reviews and finalizes the PE, submitting it to HR.

Important! If you ever lose or misplace an email from the PE portal, you can always find direct links to any necessary actions on the portal itself. The employee, supervisor, and manager dashboards all highlight necessary actions near the top of the page. The portal can also be found on MyAccess under “Staff Performance Evaluation.”

**Supervisor Dashboard**

Draft Your Employee’s Performance Evaluation

Click on the employee’s name to start the supervisor portion of the performance review for the following employee(s):

Sarina Tsel

**Step 1: Employee’s optional self-assessment and draft of the employee development plan**

Once the unit manager begins the PE process for an employee, the employee will receive an email with a direct link to the PE portal where he/she can complete the first step, which includes an optional self-assessment and draft of the employee development plan.

The self-assessment is not part of the official PE form, but is an opportunity for the employee to reflect on his/her work over the performance period and to inform the supervisor of successes/highlights during the performance period, actions the supervisor can take to help the employee, as well as any additional relevant information. The self-assessment is recommended but optional; there is no penalty for declining to answer the questionnaire.
Step 1a: Self-Assessment (Optional)

To get started with the performance evaluation process, complete the optional self-assessment questions to provide your supervisor with additional information regarding the past year. If you don't wish to complete this section, please click "Decline to Answer" below.

Your supervisor on file is Sarina Tsoi. You may have additional reviewers/supervisors who will also provide input via this portal, but Sarina Tsoi will be the primary person completing your performance evaluation for the period of 01/01/19 - 12/31/19. Please contact your unit/division manager if you believe that this is not accurate.

Please complete or decline to complete your self-assessment by XYZ date. After this date, your supervisor Sarina Tsoi will have the ability to start their portion of the performance evaluation. It is in your best interest to complete the self-assessment before XYZ date, as your information may provide valuable context for your overall evaluation.

This self-assessment is not part of the official performance evaluation form, but serves to help inform your supervisor.

After answering or declining to answer the self-assessment, the employee can begin working on an optional draft of his/her employee development plan. This is part of the official PE form and the employee will have the opportunity to revise it after meeting with his/her supervisor. At this point, the employee may also choose to defer working on the employee development plan.

1b) Employee Development Plan (Draft)

The employee development plan is part of your official performance evaluation and should be discussed with your supervisor. This is only a draft; you will have the opportunity to revise the plan after your meeting.

If you prefer to meet with your supervisor first, you may defer filling out your employee development plan until after your meeting. This option is available at the bottom of this page.

Please describe your development plan for the coming year, how you plan to complete it, and how successful completion will be measured.
**Important!** Employees can complete their self-assessment up until the time the PE is sent to them for completion of the employee comments section. This step is after the supervisor has completed their evaluation section. Because the self-assessment is optional and the employee will have another opportunity to revise and submit the employee development plan, the supervisor will have the opportunity to begin the PE after 15 business days from the time the PE was launched.

**Step 2: Supervisor fills out supervisor section of the performance evaluation and meets with employee**

Once the employee submits (or declines to submit) a self-assessment and/or draft of the employee development plan, the supervisor will receive an email from the portal informing him/her that the supervisor section of the PE must be completed. There will be a direct link on the email that the supervisor can take to the portal. After reviewing the self-assessment and draft of the employee development plan (if submitted by the employee), the supervisor will continue to the PE form. This is the same as HR's form for all UCSF staff, just presented in a web form. Links to the employee's self-assessment and employee development plan (if any), supervisor guidelines to completing a PE, and any feedback from employees' additional supervisors/reviewers (if any) will be at the top of the page. The supervisor will select a rating and enter comments for each relevant job factor before proceeding to the overall comments and overall rating. The supervisor will be able to refer to the ratings matrix during this process.
On the final page of the supervisor portion, **BOTH overall comments and rating are required to move forward.** The rating summary of performance factors is a reminder of all ratings assigned to each individual job factor on the previous page.
After submitting overall comments and selecting an overall rating, the supervisor will be directed to a page where he/she can review a current draft of the PE form, follow a link to make any necessary edits to the PE form, and request a meeting with the employee to discuss the PE and optional employee development plan.

At this point, it is unlikely that the employee and supervisor have already met to discuss the PE and employee development plan. Selecting "no" in step three on the page will give the supervisor the option of requesting a meeting with the employee with a copy of the draft PE or without a copy of the draft PE. Selecting one of these options will send an email to the employee (cc'ing the supervisor), asking him/her to schedule a meeting with the supervisor.

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**What is My Next Step?**

**Have you already met with Sarina Tsoi to discuss the performance evaluation?**

- [ ] Yes
- [ ] No

**You indicated you have not yet met.**

At this time, a meeting with Sarina Tsoi is highly encouraged.

Please choose one of the options below:

**Option 1. Send a Request for a Meeting with the Employee WITH a Copy of the Draft PE**

Choose this option if you would like to send a request for a meeting with a draft of the PE for the employee's review. Note that you will either have to come back to the portal to send the PE to the employee after your meeting, or you will get a system notification 10 days after today to finalize the PE.

[Request Meeting and Attach PE]

**Option 2. Send a Request for a Meeting with the Employee WITHOUT a Copy of the Draft PE**

Choose this option if you would like to send a request for a meeting without a draft of the PE. You will then have an option to print an PDF version of the PE which you can share with the employee at the meeting. Note that you will either have to come back to the portal to send the PE to the employee after your meeting, or you will get a system notification 10 days after today.

[Request Meeting Without Attaching PE]

**Option 3. A Meeting is Not Necessary**

It is highly recommended that you meet with your employee to discuss the PE and Employee Development Plan. If you are sure a meeting is not necessary, click the button below to send a finalized version of the PE to the employee for his/her/their comments.

[Send PE to the Employee for Comments and Signature]
If the supervisor chooses to share a draft of the PE in the email request for a meeting, the employee will have access to a PDF draft on the portal with all of the supervisor’s ratings and comments.

**Important!** After meeting with the employee, the supervisor must return to the PE portal to finalize the employee’s PE. The supervisor portal will have a direct link that the supervisor can take to review and finalize the employee’s PE at this time.

The portal will direct the supervisor to a familiar page, where the supervisor can once again review the PE, make any changes as necessary, and now indicate that the supervisor has already met with the employee. This will finalize the PE and begin the approvals/signatures process.

**What is My Next Step?**

Have you already met with Sarina Tsoi to discuss the performance evaluation?

- Yes
- No

You indicated you have already met.

Click below to submit the supervisor portion and request that Sarina Tsoi complete the development plan.

*Send PE to the Employee for Comments and Signature*
Step 3: Employee section and signature

Once the supervisor finalizes the supervisor portion of the PE, the employee will receive an email from the portal asking him/her to complete the employee section. In this section, the employee can optionally revise and finalize the employee development plan, add any optional employee comments, attach a supporting document if necessary, and sign or decline to sign the PE.

Step 3: Employee Input

A) Review Your Supervisor's Feedback

A meeting with your supervisor is highly encouraged before finalizing your employee development plan (EDP).

Review the supervisor section of your performance evaluation

This will open the PE in a new tab that you may close at any time.

B) Finalize Your Employee Development Plan (EDP)

(Optional) EMPLOYEE'S DEVELOPMENT PLAN: You should describe your development plan for the coming year...

C) Include Attachment (optional)

If you would like to attach a supporting document to your PE, please click "Choose File" to select the document on your computer and then click "Upload File." Please note that only one file can be attached, so combine multiple documents into a single file if necessary.

Choose File

No file chosen

Upload File

Acceptable formats are: .docx (word document) or .pdf (PDF).

D) Sign or Decline to Sign Performance Evaluation

Finalize PE – Sign Performance Evaluation

Clicking "Finalize PE – Sign Performance Evaluation" serves as a digital signature and will send the completed performance evaluation back to your supervisor.

Finalize PE – Decline to Sign Performance Evaluation

Clicking "Finalize PE – Decline to Sign Performance Evaluation" will send the completed performance evaluation back to your supervisor without your signature.
STEP 4: Supervisor final review and signature

Once the employee has signed or declined to sign the PE, the supervisor will receive a notification from the portal asking him/her to review what the employee has submitted and sign the PE. The supervisor can then sign the PE and submit it to the unit manager for final review or “recall” the PE in case any edits are needed. Recalling a PE pushes the PE back to Step 2, meaning the PE will need to go through the entire approvals process again. This is important because the employee, supervisor, and unit manager must all sign off on the final version of the PE.

Finalize Performance Evaluation

Sanna Tsol's performance evaluation is ready to be finalized.

1) Review the performance evaluation (This will open in a new tab which you can close at any time.)
   - The supervisor Maria Novelero signed on 11/26/19
   - The employee Sarina Tsol signed on 11/25/19

2) After your review, choose one of the following options:

   If the Performance Evaluation is ready to be finalized, click the button below to send a copy of the PE to HR. This completes the PE process for this cycle and will notify the supervisor and employee with a copy of the PE.
   
   Sign and Submit to HR

   If you don’t want to take any action immediately, click the button below.

   Return to Dashboard

   If you feel there are issues with the Performance Evaluation, you can send it back to the supervisor for revision by clicking the button below.

   Recall Performance Evaluation for Further Edits

Once the supervisor signs the PE, the process is completed for the employee and supervisor unless the unit manager recalls the PE for further revision. Upon review, the unit manager can recall the PE or sign and submit it to HR, after which both the employee and supervisor will receive a final, signed version of the PE via email. The finalized PE will also be accessible through the employee’s history on the PE portal.