CALL FOR PERFORMANCE APPRAISALS
Physicians and Dentists (DX)
Health Care Professionals (HX)
Research Support Professionals (RX)
and Technical Employees (TX)

SUPERVISORS AND MANAGERS:

This is the official call for performance appraisals for the following collective bargaining units:
Physicians and Dentists (DX), Health Care Professionals (HX), Research Support Professionals (RX), and
Technical Employees (TX) for the July 1, 2015 – June 30, 2016 Review Period.

Employee Performance Appraisal Report (EPAR)
All supervisors are expected to complete EPAR’s for their staff. The reporting period for DX, HX, RX
and TX staff is July 1, 2015 through June 30, 2016.

The stipulations of each contract are as follows:
• DX = the July 2016 increase is a Range Adjustment and not associated with the completion
  and ranking of the appraisal.
• HX = the January 2017 merit is associated with the completion and ranking of the
  appraisal.
• RX = the October 2016 increase is a Range Adjustment and not associated with the
  completion and ranking of the appraisal.
• TX - the October 2016 increase is a Range Adjustment and not associated with the
  completion and ranking of the appraisal.

Completed performance appraisals for the DX, HX, RX, and TX Unit staff are due no later
than Friday, September 9, 2016.

When working with your employees to assess 2015/16 performance and establish 2016/17 goals, be sure
to address the accomplishments and goals from both an operational and professional development
perspective. For reflecting on the 2015/16 performance, specific accomplishments that support the
departments’ goals as well as actions taken during the year to refine and grow professional skills should
be highlighted. For the 2016/17 year, operational goals should cascade from organizational priorities and
leaderships’ goals taking into careful consideration ways to make the goals specific, measurable,
achievable, results-focused, and time-bound. Employees and supervisors should collaborate to identify
attainable actions to help employees be successful in their current role and prepare them for their next
career aspiration.

If you have questions about the program deadlines or instructions:
Davis Campus – Terri De La Mora, ER Policy Analyst, 530-752-9279
Health System – Travis Lindsey, Health System E&LR Manager, 916-734-8878
RESOURCES & GUIDELINES FOR EPAR RATINGS

Appraisal Tools
At UCD, the online application is open now. It can be accessed through the web link [http://epar.ucdavis.edu](http://epar.ucdavis.edu) and can be accessed from the HR home page “Quick Links” section under, “Online EPAR Tool”. User support in the form of an online user guide and other on-demand training materials are also available and can be accessed from within the online application as well as from the Human Resources home page.

At UCDHS, you will receive an email alerting you when performance documents are available for your employees. All appraisals must be completed on-line in PeopleSoft and can be accessed from [http://ehr/psp/hrprod/EMPLOYEE/HRMS/?cmd=login](http://ehr/psp/hrprod/EMPLOYEE/HRMS/?cmd=login). Navigation is Main Menu > Manager Self Service > Performance Management > Maintain Documents. User support in the form of an online user guide and other on-demand training materials is also available at [http://intranet.ucdmc.ucdavis.edu/hr/ePerformance/stepbystep.shtml](http://intranet.ucdmc.ucdavis.edu/hr/ePerformance/stepbystep.shtml), as well as from the Human Resources home page.

The Annual Evaluation process/steps/timelines:

It is expected that Davis location appraisals be completed using the online Employee Performance Appraisal Report (EPAR), and the Health System in PeopleSoft.

- **Applicable:** All career non-probationary DX, HX, RX, and TX employees

- **Review time period:** July 1, 2015 to June 30, 2016

- **Deadline for completed EPAR Appraisals:** Friday, September 9, 2016

- **Employee Role:** Employees should prepare and submit their Summary of Accomplishments (SOA) to Supervisor (dates for employees to submit SOA is determined by supervisors in conjunction with their department review process).

- **Supervisor Role:** Performance management is a year-long responsibility. Supervisors are encouraged to meet quarterly with employees to review goals and progress. Specific to this EPAR reporting period:
  - Supervisors/Managers prepare draft evaluations for discussion with their staff.
  - Face-to-Face discussion and review of staff members performance, future goals, professional development goals, and diversity and inclusion (new additions to the process this year)
  - This is also a time when we ask managers to ensure that employee’s position descriptions for their staff are current and accurate as the evaluation is based on the work assigned to the employee
  - Supervisor finalizes appraisal