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**Filling Out Your Summary of Accomplishments** ............................................................................................. 24

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Accessing the Application

To complete the EPAR or Summary of Accomplishments (SOA) select the link below:
http://epar.ucdavis.edu

This application requires CAS authentication. If you are a supervisor and cannot access the supervisor functions, you may not be a supervisor in the PPS system. You will not have access to supervisor functions until your PPS status is updated. If you are a new employee, you will not have access to the system until your supervisor sets you up and you receive notification to begin your SOA for the current year.

User Roles

Described below are four different user roles that exist in the EPAR application. The use of all four roles is not required.

NOTE: To facilitate the proper routing of the appraisal it is critical that departmental leadership team think through the routing/signature process they want their supervisors to follow and communicate this information to all supervisors prior to them going through the employee setup process.

Supervisor
The supervisor is by default assigned to be the person who creates the EPAR setup for the employee(s). To be assigned as a supervisor you must have a supervisory role in the PPS system. Supervisors can transfer an assigned setup or individual employee(s) to another supervisor. Supervisors will no longer be able to view or edit the transferred setup/employee(s).

Employee(s)
The employee or list of employees, are people under the supervisor’s supervision which needs to be reviewed. Once they are set up in the EPAR application these employees will have the opportunity to fill out their Summary of Accomplishments and the supervisor can complete the EPAR for them. When you see the word employee in this document, it can also apply to all the employees in the setup.

Reviewer - (Optional)
A reviewer is an individual selected by a supervisor to review the EPAR. In order for the supervisor to benefit most from the feedback the “Reviewer” might provide, the “Reviewer” should provide feedback prior to the Supervisor sending the draft appraisal to the employee. Reviewers will have access to view an appraisal even after the appraisal has been finalized.

Typically, you assign this role to your organizations internal HR person. However, the role is flexible and depending on routing requirements, you may find it necessary to select some other person. A reviewer may also serve as an Approver 1 or 2.
Approver(s) - (Optional)
You can have up to three approvers. Use of these roles is dependent upon your particular organizational structure/hierarchy and the process established for appraisal signatures. An Approver 1 is an individual one level above the supervisor who must sign and comment on an employee’s written evaluation. In our organization, typical working titles for these employees are Department Head, Division Head, and Assistant Dean. An Approver 2 is an individual two levels above the supervisor who must sign and comment on an employee’s written evaluation. In our organization, typical working titles for these employees are Director, Dean, or Associate Vice Chancellor. Approver 3 is a role held by an individual, at least one level above the Approver 2.

Process Overview

The graphic above displays the basic EPAR process. First, the Supervisor sets up a single or several employees in a setup. Instructions for this are available in the Employee Setup section. Next, each employee fills out and submits their Summary of Accomplishments by following the directions in the Filling out Your Summary of Accomplishments section. Then, the supervisor completes the EPAR as described in the section titled Filling out Your Employee’s Performance Appraisal. When you are ready to submit your appraisal in its final form, you can refer to Completing the EPAR Review Process for the details on how to do that. If you are a reviewer or approver, these can also be useful sections to cover.
Employee Setup

Adding a New Setup

If you are entering the EPAR application for the first time this year, your setup will start out blank as shown below.

To add a new setup for the current year you can select the Add New Setup button. You will then enter the People Search & Set Structures page shown below.

Note – Please select the appropriate appraisal period from the drop down menu.

On this page, you will need to set up the roles for each person involved in the EPAR process. You can use the Add to Employees List (These are employees you supervise), Add as Reviewer, Add as Approver 1, Add as Approver 2, or Add as Approver 3 (This is the approval chain) buttons to assign the correct role to the individual selected.

MSO's and CAO's can create employee setup(s) on behalf of a supervisor and transfer the setup(s) to the supervisor and still remain in the approval process.

Before you start, you should review the User Roles to be clear what actions each role can take. Additionally, to ensure proper routing of the appraisal it is critical that you understand departmental specific information about the required approval/routing sequence, or who must serve in one of these roles.
Here are some tips to help you get started:

- If you have multiple employees with the same setup you can add them all to one setup.
- If you have employees where the reviewers/approvers are different, you will need to add them in an additional setup. As an example, suppose that you supervise a few employees who frequently work with a faculty member you wish to identify as one of their approvers, while other employees under your supervision work with a different faculty member. You are able to set up separate Supervisor Setup “pages” enabling each group’s record to be reviewed and approved by the appropriate individuals according to the situation.
- A reviewer can also be an approver.
- If you have an employee that has already been set up by another Supervisor, they will be added to the list of employees, but an error message will display with the name of the other Supervisor. If this employee does not have a split appointment you will want to discuss with the other supervisor which of you will complete the EPAR for this employee.
- If you change the supervisor, the current setup will be transferred to them. You will no longer see it listed in your setups or be able to edit the setup. If you accidentally transfer a setup to another supervisor they can transfer it back to you at any time as long as you still have a supervisor role in PPS.

**NOTE:** If you select a button to add an individual to a role and nothing happens, check the error message displayed in red text below the button for an explanation of why the individual cannot be added to that role.

**Searching for an Person**

To search for a person you would like to assign to a role, you can enter their Last Name, First Name, or Employee ID and select the search button. The search results display in a list to the right of the search menu.
When there are multiple people returned from a search, you can select which employee you want to choose. When the search returns only one person, the application assumes them as the choice. Now when you click one of the buttons to assign a role, the application assigns the person to that role. Upon completion of the EPAR setup, select the **Back to Supervisor Setup** link. You should now see the setup listed under the **Add New Setup** button as shown below.

### Notifying Your Employee(s)

From this screen, you can notify them of the date on which their Summary of Accomplishments (SOA) is due to you. You have the option of selecting a different date for each employee, or sending the same SOA Due date to every employee in the list. If your employee does not complete their SOA seven days before the due date, they will receive a single reminder notification once the due date has passed. Sending a notification of SOA due date is not required for your employee to begin their SOA, but we highly recommend you send one before starting the employee’s evaluation. Regardless of whether you notify the employee of their SOA due date, an employee is not required to complete a SOA. You will still be able to complete their appraisal regardless of the SOA status.
Editing an Existing Setup
If you forgot to add someone to a role or need to edit the list of employees, you can return to a setup by selecting the edit link next to the setup you wish to change (see below).

It is a good idea to not make any changes unless absolutely necessary after the EPAR process has officially begun. Also you cannot delete an employee if you have already started their EPAR.

Changing the Reviewer - EPAR Routed to Reviewer
Once the EPAR process has been routed to the reviewer, you can change the reviewer but a replacement reviewer must be identified. From the Supervisor Setup screen, select the Edit button. Search for the new reviewer and select them. Select the Add as Reviewer button.

Changing the Approver – EPAR Routed to Approver
Once the EPAR process has been routed to the Approver, you can change the approver but a replacement must be identified. From the Supervisor Setup screen, select the Edit button. Search for the new approver and select them. Select the Add as Approver 1 and/or 2 button.
Deleting the Reviewer or Approver
The supervisor has the option to delete the Reviewer or Approver as long as the EPAR has not been routed to the Reviewer or Approver.

Changing the Supervisor for Entire Setup
There are some situations where you would need to re-assign an EPAR setup to a supervisor other than yourself. A typical situation might be when Supervisor A started the process and in the middle of the process is leaving that position. In this instance, it would be appropriate to transfer these employees to new Supervisor B. To do this you will need to search for the new supervisor and select them. Next, select the Change Supervisor button, the new supervisor will be listed under the button. If you are a MSO or CAO creating employee setups for other supervisors, you can now set yourself as a reviewer and/or approver. You must then select Transfer Setup To link to transfer the entire setup.

The following dialogue box will display:

Search for the new approver and select them.
Select the OK button to confirm the transfer of the setup. If successful, you will be brought back to the supervisor setup page. You will no longer be able to view/edit this setup once the supervisor has been changed. The new supervisor will receive notification that you have transferred ownership of this setup to them via email.

If you remain on the current page, check the error message in red below the Change Supervisor button. The person you selected is not eligible to be a supervisor if they do not have supervisor status in the PPS system.

**Transferring Individual Employee(s)**
Supervisors may also transfer individual employees to another supervisor. To transfer an individual employee to another supervisor, search for the new supervisor and select them. Select the Transfer button next to the employee you wish to transfer.
When you select ok, a dialogue box will display confirming the employee has been transferred to the new supervisor. The new supervisor will receive notification that you have transferred ownership of this EPAR to them via email. When you return to the Supervisor Setup tab, the employee will no longer be listed in your setup on your setup page.

If you remain on the current page, check the error message in red below the Add to Employees List. The person you selected is not eligible to be a supervisor if they do not have supervisor status in the PPS system.

Deleting a Setup
You can delete an entire setup by selecting the Delete link next to the setup you wish to delete (see below). Remember, if an employee has entered any information on their SOA or the supervisor has begun an appraisal for any employee listed, you will not be able to delete the setup.

Multiple Setups
If you have an employee or set of employees who need their EPAR approved by an Approver who is different from the rest of the employees you need to set up, you will need to create an additional setup for them. You can have as many setups as you need to cover the different reviewer/approver scenarios for all of your employees. You can only add each employee to a single setup that you own.
Employee Already Added/Split Appointments
If an employee has a split appointment and reports to two different supervisors, each supervisor needs to complete an EPAR for the employee. Employees with split appointments will have two separate SOAs and appraisals, however, one of the departments derived on the EPAR will be incorrect. The supervisor with the EPAR listing the incorrect department can select the correct department from the drop down menu on the Employee Info tab. The correct department will also reflect on the SOA and appraisal.

Historical Records
If you are an employee writing your Summary of Accomplishments, a supervisor writing an EPAR for an employee who is new to you, or a supervisor who supervises many employees you may want to review past EPAR appraisals. You can access historical records for yourself or any employee you have setup for the current year. Historical records for a given employee will display even if you were not the supervisor to complete previous evaluations. To view historical records make sure you are on the EPAR Management tab, and then select the Historical tab.
Below is an example of what you might see on the **Historical** tab; viewing a historical SOA/Appraisal works the same as on the **Current** tab.

**Employee Performance Appraisal Report (EPAR)**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Appraisal Period</th>
<th>SOA</th>
<th>EPAR Status</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twin</td>
<td>Mark</td>
<td>7/1/2010 - 6/30/2011</td>
<td>Completed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twin</td>
<td>Mark</td>
<td>7/1/2011 - 6/30/2012</td>
<td>Completed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filling out Your Employee’s Performance Appraisal**

**How to Begin**

To complete the EPAR go to [epar.ucdavis.edu](http://epar.ucdavis.edu). The screen shown below will display, once login is complete. If you have not set up your employees for this year please refer to the **Employee Setup** section of this document. Otherwise, select the link that says Enter the EPAR System.
The **EPAR Management** tab displays the records that correspond to the setup you created.

On the **EPAR Management** screen (shown above), select **View SOA/Appraisal** to see what has currently been entered. If no SOA/Appraisal is available for the current year, you still need to **setup** your employees. Please see the previous section titled Employee Setup for instructions.

Once you’ve selected an employee’s appraisal, the Employee Info page (below) should appear. All required fields **must** be completed before you can continue to the next step.
When you have completed the required fields, you will need to select the Part I – Last Year’s Performance tab to continue. This tab will allow you to enter information about the employee’s performance over the last year. You should start by copying the goals set for your employee in the previous year’s appraisal. You may also copy everything that the employee has entered in their SOA for this year.
How to Copy Last Year’s Goals from Previous EPAR

When you first view the Part I: Last Year’s Performance tab of an employee’s performance appraisal (as seen below) there are no job function, goal, or achievement entries added. You should start the new EPAR by copying the performance goals set for your employee in the previous year’s EPAR. You can copy these goals by selecting the Copy last year’s Goals button.

NOTE: You will not be able to copy Last Year’s Goals for employees if the previous appraisal period is different from the current appraisal period. For example, employee A’s previous appraisal period was 7/1/2012 – 6/30/2013 and this year employee A’s appraisal is now 5/1/2013 – 4/30/2014.

The pop-up box shown below will display. Select OK to proceed with the copy.
The newly added entries display in a grid below the buttons on the bottom of the page (as seen below). Notice the column labeled **Copied**. The Yes in this column indicates that these items are a copy. You **must** edit each one before continuing to the next section. When you save an entry, the Copied column will display No for that entry.

![Grid of entries](image)

### How to Copy Information from the Employee’s Summary of Accomplishments (SOA)

When you first view the “Part I: Last Year’s Performance” tab of an employee’s performance appraisal (as seen below) there are no job function, goal, or achievement entries added. If an employee has completed the Summary of Accomplishments (SOA) for the current year, you **may** copy this information into their Employee Performance Appraisal Report. Select the **Copy from SOA** button to copy all job functions, goals, and achievements they have entered.

![Employee Performance Appraisal Report](image)

To copy the employee’s entries to their SOA select “**Copy from SOA**.”

Copying does not alter the employee’s SOA.
You will need to confirm your choice, before the copy completes. If you have accidentally, selected the button you can choose Cancel and the entries will not be copied. Pressing OK will copy all SOA entries.

The newly added entries will display in a grid below the buttons on the bottom of the page (as seen below). Notice the column labeled Copied. The Yes in this column indicates that these items have been copied and you must edit each one before continuing to the next section. When you save an entry which you have edited the Copied column will display No for that entry.

<table>
<thead>
<tr>
<th>Add New</th>
<th>Copy From SOA</th>
<th>Copy Last Year’s Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copied</td>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>View/Edit Delete Yes</td>
<td>Achievement</td>
<td>Achievement</td>
</tr>
<tr>
<td>View/Edit Delete Yes</td>
<td>Goal</td>
<td>Goal</td>
</tr>
<tr>
<td>View/Edit Delete Yes</td>
<td>Job Function</td>
<td>Job Function</td>
</tr>
</tbody>
</table>

**How to Edit an Entry**

After copying entries from an employee’s goals from last year’s EPAR or SOA information, you need to edit or modify each entry in some way. You must also assess the applicability of the “Demonstrated Competencies” and rate each entry.

Select View/Edit to display the entry you wish to edit.

Follow these steps to update the entries:

1. Update the description.
2. Review then add/delete any demonstrated competencies.
3. Add a Rating.
4. Update the Supporting Comment to reflect your evaluation.
Each step is shown in the image below.

1. Update a description
2. Review then add/delete any demonstrated
3. Add a Rating
4. Update the Supporting Comments

NOTE: Make sure you hit the Save & Close button when you complete your entry!
How to Add a New Entry
Select the Add New button to add a new entry of your own to the current employee’s appraisal. This will then display a new blank entry for you to fill in. Follow these steps to complete the entry:

1. Choose the type of entry. (Job Function, Goal, or Achievement)
2. Add a description for the entry.
3. Choose any demonstrated competencies.
4. Select a Rating.
5. Add Supporting Comments.

**Note:** Supporting comments should provide the detail and/or context that explain the significance of that particular item (Job Function, Goal, or Achievement).

6. Save your entry.

The image below shows these steps.
How to Delete an Entry

There may be entries that you wish not to include in the EPAR, or you may accidentally add duplicate entries that you wish to delete. Selecting Delete next to the entry in the grid that you want to remove will delete that entry.

In case you accidentally selected an entry, you will be prompted to confirm your decision. Be careful because deleted entries cannot be recovered. To confirm deletion select OK.
How to Return a Finalized SOA to an Employee

If an employee has completed their SOA, the supervisor may return an SOA to an employee to make the necessary updates or corrections. Select the **Return SOA to Employee** button on the Summary of Accomplishments page. An email notification will be sent to the employee informing their SOA was returned. Once all appropriate changes are made, the SOA will need to be resubmitted to the supervisor.

Select “Return SOA to Employee” button
How to Copy Information from the Employee’s Future Goals (current SOA)

When you have completed Part I – Last Year’s Performance. You will need to select Part II – Future Goals tab to continue. This tab will allow you to enter information about goals you and the employee have set for the coming year. You may copy any future goals entered by the employee in their SOA for next year, by selecting the Copy From SOA button. Use the Add New button to add a new future goal.

These buttons behave just like the buttons from Part I, if you have questions refer to the previous sections titled How to Copy Information from the Employee’s Summary of Accomplishments (SOA), and How to Add a New Entry. See the image below as a reference.

You will still need to edit each entry that you copied from the SOA before you can continue. Simply select the edit link to display the entry and select the Save button after you have made changes. If you do not wish to use the copied entry, you can delete the entry.
How to Return a Finalized EPAR to an Employee

If an EPAR needs to be returned to the employee for any reason (corrections, updates, etc.) after an EPAR has been approved and finalized, the supervisor can select the Reset This Appraisal button. The appraisal will reset and all signatures are blanked out. Once the appropriate changes have been made, the appraisal will again route through the approval process and approvers will receive new email notifications.

Select OK from the dialogue box below to proceed.

Are you sure you want to reset this appraisal?

The confirmation dialogue box below will display confirming the Appraisal was reset. Select OK. Once the appropriate changes have been made, the appraisal will again route through the approval process and approvers will receive new email notifications.
Previewing the Entire Document

To preview the entire EPAR in its completed form select the Preview Entire Document tab.

This will generate a PDF preview in another window that you can review, save, and/or print. This tab is available at all routing stages of the EPAR process for any user. Here is a sample of the PDF that is generated:

---

**University of California, Davis**

**Employee Performance Appraisal**

**for PSS and MSP employees**

---

**Employee name:** Mark Twain

**Title:** 7234 - ANL 1

**Bargaining unit:** 99 - NO BARGAINING UNIT

**Working title:**

**Supervisor name:** Diana Cox

---

**Employee ID:** 1111111111

**Percent appointment:**

**Department:** 061100 - GRADUATE SCHOOL OF MANAGEMENT

**Length of time:** 12

---

**Supervised length:**

---

**Job Functions, Goals, Last Period's Achievements and Supporting comments**
Filling Out Your Summary of Accomplishments

How to Begin
You will receive an email notification with a deadline for completing your SOA. The link in the email will display the page below after you have logged in. You can enter the EPAR at any time prior to receiving your notification as long as your supervisor has set you up in the system. In addition to using the link in the email notification, you can also access the EPAR application directly off the HR home page or by typing in http://epar.ucdavis.edu in your web browser.

Select the link that says Enter the EPAR System to begin your SOA for the current year.

On the EPAR Management screen (shown below), select View SOA/Appraisal to open the SOA screens. If no SOA/Appraisal is available for the current year you should contact your direct supervisor and make sure they have set you up properly in the system.
When you enter the EPAR application for the first time, the SOA page (shown below) will be displayed. Notice that the first tab displayed is the **Part I – Last Year’s Performance** tab.

On the **Part I – Last Year’s Performance** tab you will need to add any Job Functions, Goals, or Achievements you have completed. If you are entering a Job Function, Goal, or Achievement the form is set up to enter one item at the time. To save data entry, most people begin this step by copying goals they set with their supervisor the previous year.
How to Copy Last Year’s EPAR Goals to Your Summary of Accomplishments (SOA)

Part of the previous year’s appraisal process included working with your supervisor to establish goals for the next appraisal period. You should address these goals as part of completing your current year’s SOA. You can avoid having to retype these goals by copying them from the previous EPAR. To do this, select the Copy Last year’s Goals button (as seen below).

You will be presented with a pop-up (shown below). Select OK to proceed with the copy.
The newly added entries will be displayed in a grid below the buttons on the bottom of the page (as seen below). Notice the column labeled “Copied”. The Yes in this column indicates that these items have not changed since copying occurred. When you save an entry, which you have edited, the Copied column will display No for that entry. You will need to be update or edit each goal with comments on your performance over the past year before you can move on to Part II.

<table>
<thead>
<tr>
<th>Add New</th>
<th>Copy Last Year’s Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copied</td>
<td>Type</td>
</tr>
<tr>
<td>View/Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>View/Edit</td>
<td>Delete</td>
</tr>
</tbody>
</table>

**How to Edit an Entry**

Once you have copied goals from last year’s EPAR you will need to edit each entry to add comments on your performance for that entry. This is also your opportunity to edit the description if the scope or details of an entry have changed over the course of the year. Select View/Edit to display the entry you wish to edit.

Select the “View/Edit” to display entry.

Follow these steps to update the entries:

1. Update the description if necessary.
2. Select one or more demonstrated competencies you think you exhibited.
3. Add Supporting Comments.

**Note:** Supporting comments should provide the detail and/or context that explain the significance of that particular item (Job Function, Goal, or Achievement)

4. Save your entry
How to Add a New Entry

Select the Add New button to add a new entry of your own to your SOA. This will then display a new blank entry for you to fill in. Follow these steps to complete the entry:

1. Choose the type of entry. (Job Function, Goal, or Achievement)
2. Add a description for the entry.
3. Choose any demonstrated competencies.
4. Add Supporting Comments.

**Note:** Supporting comments should provide the detail and/or context that explain the significance of that particular item (Job Function, Goal, or Achievement).

5. Save your entry.

**NOTE:** Make sure you hit the **Save** button when you complete your entry!
Each step is identified in the image shown below.

1. Choose type of entry
2. Add the description
3. Choose any Demonstrated Competencies
4. Add supporting comments
5. Save your entry
How to Add Future Goals to Your SOA

The Future Goals section of your SOA is accessible by selecting the Part II – Future Goals tab (see below). Here you have the opportunity to suggest “Future Goals” to your supervisor for the coming appraisal period.

You can add multiple goals one at a time. Make sure to save your entry using the Save button, and the Add New button to add each new goal. Your supervisor can later choose copy these goals and include them in the EPAR for discussion with you. The buttons on this page work the same as they did in Part I of your SOA.
How to Delete an Entry
There may be entries, which you add to your SOA, that you no longer want to include or you may accidentally add duplicate entries that you wish to delete. Selecting the **Delete link** next to the entry in the grid that you want to remove will delete that entry.

<table>
<thead>
<tr>
<th>View/Edit</th>
<th>Delete</th>
<th>Copied</th>
<th>Type</th>
<th>Description</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Goal</td>
<td>Goal From Last Year</td>
<td>Comments that describe performance.</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Goal</td>
<td>Another Goal From Last Year</td>
<td>Comments that describe performance.</td>
<td></td>
</tr>
</tbody>
</table>

In case you accidentally selected to delete an entry you will be prompted to confirm your decision. Be careful because deleted entries cannot be recovered. To confirm deletion select OK.

Previewsing your SOA
To preview your entire SOA select the **Preview Entire Document** tab at any time.

This will generate a PDF preview in another window which you can review, save, and/or print. This tab is available at times. Here is a sample of the PDF which is generated:
University of California, Davis
Summary of Accomplishments
for PSS and MSP employees

Period covered: 7/1/2012 to 6/30/2013

Employee name: Mark Twain
Title: 7234 - ANL 1
Employee ID: 111111111
Department: 061100 - GRADUATE SCHOOL OF
MANAGEMENT

Job Functions, Goals, Last Period’s Achievements and Supporting comments

Note: If you have problems viewing the PDF and you are using Google Chrome as your browser try
disable both the Chrome PDF plug-in and the Adobe PDF plug-in (This is a known Google Chrome
issue). If you are using Safari on a Mac there can be a long delay, wait for one minute if you still cannot
see the PDF try using Firefox instead. If neither situation apply to you, check your browser settings or re-
install Adobe Acrobat Reader for your browser.
Submitting your SOA

You should submit your SOA to your supervisor on or before the deadline stated in the electronic notification. To submit your SOA select the **Submit to Supervisor** tab (shown below).

Once you have “submitted” the SOA it is considered final, and you will no longer be able to edit the document. If you would like to share a draft of the SOA before “submitting” it, you will need to do this outside the EPAR system by providing a hard copy to your supervisor to review. See the previous section titled *Previewing your SOA* for instructions.

You will be prompted to confirm this choice. Select OK to confirm.

Completing the EPAR Review Process

**For Employees - Review and Signature Process**

You will receive a notification when your supervisor has signed and submitted your final EPAR for your review and signature. After notification, you will need to enter the EPAR application and select the Overall Rating & Signatures tab (see below).
On the page displayed above, follow these steps:

1. Add any final comments (optional).
2. Electronically sign your EPAR by checking the signature box.
3. Select the **Submit to Supervisor** button.

If you do not have time to complete your comments and want to return later to submit your EPAR make sure you save your comments by selecting the **Save** button. Do not select the **Submit to Supervisor** button until you are ready for final submission.
For Supervisor – Review, Signature and Approval Process

To begin this process, select Part III – Overall Ratings & Signatures. This will display the page shown below. You must select an overall rating and provide comments that support that selection (required). After completing this step you will be able to:

- Submit to Reviewer
- Submit Draft w/o Signature to Employee
- Submit Final to Employee

Note: Once the supervisor checks the supervisor signature box the final routing of the EPAR begins.
Reviewer Feedback
Before you send the draft EPAR to the employee, you can first send it to the person designated as the Reviewer in the EPAR setup for review. To do this, select the Send to Reviewer button. They will receive an email notification. When they have reviewed the EPAR you will receive an email notification as to whether they will contact you, or you can proceed with the rest of the EPAR process. If you do not receive a notification in a reasonable amount of time you may want to contact the reviewer directly.

Employee Draft
Before finalizing the EPAR, you should send the employee a draft of their EPAR for them to review. Select the Send Draft w/o Signature to Employee button to send the employee a notification that their EPAR is ready for review.

EPAR Review
After the supervisor has sent the draft EPAR, the supervisor should set up an in-person meeting with the employee to discuss/review and finalize the EPAR. Once this conversation is complete, the supervisor needs to take the following Actions:

1. Make any agreed upon changes to the EPAR
2. Electronically sign your EPAR by checking the signature box.
3. Select the Submit Final to Employee button.
Approver(s) Review and Signature
As an approver you will receive a notification when an EPAR is ready for your approval. You will need to enter the EPAR application using the link provided in the notification or access it directly from the HR home page. On the EPAR Management tab, select the appraisal that is ready for your signature. You will know which ones are ready because the Status column will show Approver. After you have previewed the appraisal, select the Overall Rating & Signatures tab (see below).
Follow these steps to sign and submit to EPAR:
1. Add any final comments (this field is optional).
2. Electronically sign your EPAR by checking the signature box.
3. Select the Submit to Supervisor button.

**Preparing for Next Year**

The EPAR application will allow supervisors to set up employees for next year. To do this on the Supervisor Setup page select the drop down for next year and complete an EPAR setup (shown below).

| Period: | 7/1/2013 - 6/30/2014 |
| Setups: | Add New Setup |
| Supervisor | Reviewer | Approver 1 | Approver 2 | Approver 3 |
| View Employees | Edit | Delete | Jennifer Jenkins |

Employees:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Bargaining Unit</th>
<th>Email</th>
<th>SOA Due Date: (mm/dd/yyyy)</th>
<th>Email Notification</th>
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<tbody>
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<td>Mark</td>
<td>Twin</td>
<td>99</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you have not completed all of your appraisals for the current year, you will see a pop-up message (shown below) that reminds you to complete the work remaining for this year.

![Message from webpage]

"The appraisals are not completed yet for the current appraisal period."

You can now select the EPAR Management tab, and on the Future tab begin adding information for next year. Your employee will also have access to begin adding information for next year immediately after you set them up.