The MANAGING PERFORMANCE DATA process begins with the local compilation of staff performance ratings and ends with the upload of those ratings into UCPATH.

### AS-IS PAIN POINTS
- No common system for tracking performance data
- Creating merit roster requires extensive back-and-forth along with data corrections

### IMPROVEMENTS
- UCPATH will serve as a common tracking system for performance ratings and staff merits
- UCPATH provides better data to begin the process, reducing the difficulty of producing a merit roster

### BENEFITS
- Much more visibility into performance ratings across UCR

### ROLES FOR MANAGING PERFORMANCE

#### UCR HUMAN RESOURCES (REQUIRED)
- UCR defines merit program guidelines for non-represented staff:
  - HR initiates annual performance management process
  - Collects ratings for each org. unit via the Performance Appraisal Audit Spreadsheet stored on a secure SharePoint site
  - Combines ratings from all org. units into a single spreadsheet
  - Uploads the spreadsheet ratings to UCPATH

#### ORG UNIT (REQUIRED)
- Coordinates collection of performance ratings for their Organizational Units and inputs into performance tracking spreadsheet hosted on SharePoint.
- Communicates impact to affected employees.

### MANAGING PERFORMANCE DATA

Roadmap presents the most common business case.

#### INITIATOR
- HR develops a Performance Appraisal Audit Spreadsheet and posts a version for each org. unit on SharePoint

#### FULFILLER
- Each department/org. unit completes their performance appraisals, inserts the ratings on the Performance Appraisal Audit Spreadsheet and stores on org. unit specific secure SharePoint site

#### COMPLETE
- UCPATH receives consolidated ratings spreadsheet and uploads into UCPATH Performance Appraisal Audit Spreadsheet
- UCR HR consolidate ratings into spreadsheet and sends spreadsheet to UCPATH

Please note, an individual may assume one or many roles.

### DID YOU KNOW?
- The SharePoint site will be secured by Org Units to ensure that users cannot see merit increases that they are not authorized to view.

### THE PROCESS IS SUCCESSFUL IF...
- Staff members receive correct merit pay on the announced pay date

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**LEGEND**
- **SSC** Shared Services Center
- **System Actions**
- **People Actions**