Online Performance Appraisal Key Points

NOTE: ALL appraisals must be completed by Friday, May 24, 2024

Deadline for submission of <u>ALL</u> Performance Appraisals: **Friday, May 24, 2024**

Main Appraisers (Supervisors):
http://employees.henrico.us/info/supervisors/performance-appraisal/

✓ **Appraisal Date Range** = Evaluation Period. Appraisals are for FY24:
   o Appraisal Period Start Date: 17-Jun-2023
   o Appraisal Period End Date: 14-Jun-2024

✓ Use the "**Henrico Employee Annual/Probationary Appraisal**" template for employees who were hired on or after 4/30/2023 <u>AND</u> on or before 6/16/2023. NOTE: Only this one appraisal is required. The appraisal date range for these employees will be:
   o Appraisal Period Start Date: Employee's hire date
   o Appraisal Period End Date: 17-Jun-2024

✓ **For employees with less than one year of service** (hired on/after 6/17/2023) **<u>complete an annual appraisal at this time</u> AND THEN complete a probationary appraisal when they actually complete their first 12-months of service.**
   o If the date is June, July or August you may be able to use the same rating and comment as: [Name]'s job performance remains consistent with annual appraisal given on [date].

✓ For employees **hired <u>on or after</u> May 1, 2024**, an annual appraisal is not required at this time. An annual/probationary appraisal will be completed during the FY25 annual appraisal cycle.

✓ Supervisors will create performance appraisals via **Manager Direct Access ➔ Performance Appraisal Process ➔ Click here to Create NEW Appraisal!** Notifications on the progression of the appraisal will be delivered via **My Worklist** (All Notifications: Note: notifications can be sorted by "Sent" to bring the most recent work list notification to the top of the work list)

✓ **If you are an Oracle Financials user**, you must remember to access notifications through the Manager Direct Access or Employee Direct Access Worklist – **do <u>not</u> access the work list through "Workflow User Web Applications"**

✓ **Vacation rules also apply** to the Performance Appraisal System.

✓ Instructions and ✅ TIP are provided at each step of the appraisal process. Additional information is also available by clicking on the "i" bubbles ℹ️

✓ **If you do not see all the employees who report to you**, or you see employees who no longer report to you, contact your Department Gatekeeper to have a HR Action Form created and submitted to HR. Changes happen in real time as soon as the form is keyed in Oracle you will see the change in your hierarchy list.

✓ If you review the **list of approvers** and it **is incorrect**, contact HR at 501-7544 for instructions.

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✓ Current hierarchy is followed for the approval process so the system automatically follows the chain of command based on the most current data in Oracle HRMS. **If you need to change the hierarchy during the appraisal process, please contact HR for specific instructions**.

✓ Indication of input on an employee performance from a previous supervisor, Lead Worker or Team Leader can be formally documented by using the **Add an Ad Hoc Reviewer** feature. This enables the previous supervisor, Lead Worker or Team Leader to review the appraisal and documents their participation in the appraisal approval process.

✓ **If you delete an appraisal** you cannot recreate one the same day without changing the default date on the first set-up page to the previous day's date (e.g. change 24-Mar-2024 to 23-Mar-2024).

✓ The appraisal can **only** be changed by the Main Appraiser and can only be changed by the Main Appraiser if an Approver rejects the appraisal. **Rejected appraisals** are returned to the supervisor (main appraiser) immediately.

✓ If you need to access a **rejected appraisal** more quickly, call 501-7544 and the appraisal can be restored manually and immediately back to the Main Appraiser (Supervisor).

✓ The appraisal process is the same for all types of appraisals: Annual, Annual/Probationary, Probationary, Interim, and Extended. All appraisals are completed online using the Performance Appraisal Process.

✓ The printed and signed appraisal is only for the employee who does NOT have access to the computer at work. ALL OTHE EMPLOYEES MUST COMPLETE THE ONLINE APPRAISAL (see separate instructions)

✓ There is a **2,000-character limit** for all open text boxes – limit **includes all spaces + characters**.

✓ **You may attach multiple documents to the appraisal**. If you attach a document you must indicate in the "Overall Rating, Comments and Upcoming Goals" open text box that there is an attachment. For example: See attached goals.

✓ Name your attachments using the following convention: Fiscal Year, Employee Name, Document Type: For example: FY24 Higgins Goals

✓ **Attachments are visible to all participants.** There is **no limit on the number** of attachments.

✓ **Copy and Paste**: Oracle does NOT translate apostrophes or quotation marks from Word properly. If you copy/paste anything with ` or " "   Oracle will convert these characters to noncompatible random characters such as: squares, y, &,T,%,E,*,/,$, etc.

  o Try to use non-possessive language to eliminate apostrophes: Terri's teamwork skills… should be re-worded to eliminate the apostrophe: Terri demonstrates teamwork skills…

  o Try to eliminate quotation marks: Customer said, "Great Job" could be indicated as Customer said GREAT JOB.

  o **If you cannot eliminate apostrophes or quotations in your narrative, remember to manually key over the apostrophes and quotations after you cut/paste into Oracle.**

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Approvers: http://employees.henrico.us/info/supervisors/performance-appraisal/

✓ Approvers: Choose your comments wisely. Once submitted for approval, comments can be seen by all approvers and cannot be altered.

✓ **Approvers' comments are NOT visible to the employee**. If an approver wants to add comments to an appraisal so the comments are visible to the employee, the approver must first reject the appraisal and then contact the supervisor (main appraiser) so the supervisor can add the comments to the * Overall Comments/Upcoming Goals section (under the rating).

✓ The **Request More Information** feature allows you to request additional information from anyone in the hierarchy who has already seen the appraisal. This is basically a two-way dialogue internal to the appraisal itself. It does halt the approval process while the exchange is going on. Remember that the comments will also become part of the official electronic record and visible to all approvers. Comments are NOT visible to the employee because this feature is used only as a tool to overcome any communication challenges (e.g. different shifts/work schedules) between approvers.

✓ The appraisal can **only** be changed by the Main Appraiser (employee's direct supervisor) and can only be changed by the Main Appraiser if an Approver rejects the appraisal.

✓ Once a rating been given and comments/goals added to the appraisal and it is placed in the approval workflow, it can only be changed by clicking the **Reject** button. Rejected appraisals are returned immediately to the supervisor and are immediately available via the Manger Direct Access - Performance Appraisal System – Update pencil icon.

✓ **Rejected appraisals are returned to the supervisor** (main appraiser) **immediately**.

✓ Current hierarchy is followed for the approval process, the system automatically follows the chain of command based on the most current data in Oracle HRMS. **If you need to change the hierarchy during the appraisal process, please contact HR for specific instructions**.

Employees: http://employees.henrico.us/info/appraisals/

✓ **Employees must access their current appraisal via Employee Direct Access ➔ My Appraisal then scroll down and click once on Update pencil icon** 🖊

✓ Employees can access their previously (old) completed appraisal via **Employee Direct Access ➔ My Appraisal**. Scroll all the way to the bottom of the page to see completed appraisals.

✓ Do **NOT** access the appraisal (to review or approve) via the email or work list notification.

✓ Clicking on the **OK button does NOT COMPLETE the appraisal**.

✓ Appraisals are **NOT COMPLETE UNTIL YOU CLICK THE SUBMIT** button (submit does not indicate agreement – just that you have reviewed the appraisal).

✓ **Employees have 2,000 characters to provide your own feedback on the appraisal**.

✓ Contact HR at 501-7544 for instructions regarding anything you want to attach to the appraisal.

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ALL Appraisal Participants

✓ Additional information is available online at:
  - o Employees: http://employees.henrico.us/info/appraisals/
  - o Supervisors and Approvers: http://employees.henrico.us/info/supervisors/performance-appraisal/

✓ If you use AOL as your Internet provider, you may have trouble logging in to Oracle HRMS. To access, you must log onto the Internet using AOL, then minimize AOL and open Internet Explorer (version 7 or older). You can use Internet Explorer to log into and use Oracle HRMS.

✓ If you experience difficulties accessing Oracle with Internet Explorer, try Mozilla Firefox. Mozilla Firefox is an internet browser that has no known conflicts with Oracle. It is a free browser – check with your department's IT resource to download if you are experiencing access difficulties at work.

✓ If you click on the flashlight or calendar and get a "pop-up blocker" message, you must change your Internet settings to "Always allow pop-ups from this site". If the Google or Yahoo toolbar is installed on your PC, you must also set the "Always allow" setting using that specific toolbar's pop-up blocker.

✓ Contact HR with any questions, concerns, issues or problems:
  - o Tammy Parsley at 501-7544 or par59@henrico.us
  - o Or email: HR-ClassandComp@henrico.us