Oracle Performance Appraisal (OPA) Effective 1-Mar-2024
Main Appraisers and Approvers: What's New and What's Notable

Appraisal Action	What's Notable	Additional Notes
View People in Hierarchy	• BUTTON – click to go to a list of direct reports with an action icon that displays all previous appraisals by employee	• Quick and easy way to access previous appraisals/attachments
Adhoc Approvers	• When adding multiple Adhoc Approvers, if you add an incorrect approver, or an approver in the incorrect order, you must delete all Adhoc Approvers in numeric order back to the incorrect approver. • Then you can add the Adhoc Approvers back in the correct order.	• **Reminder**: Carefully review and choose the "**Insertion Point Before**" when adding an Adhoc Approver • How To document available online – see link below
Request Additional Information	• Requests now travel through your EMAIL notifications • Responses now should be made via your EMAIL notifications *(e.g. same as timecards, leave requests, training requests...)*	• Access requests and respond via your regular County email account
Rejected Appraisal	• Returned **IMMEDIATELY** to the supervisor by OPA • **Rating or Comments need to be revised**: Click on the yellow pencil icon to update the appraisal, make the changes, and then follow the regular process to resubmit for approvals • **Attachments need to be added, deleted or revised**: Click on the trash can icon, confirm the deletion (Yes) and then create a new appraisal with the correct attachments following regular process to resubmit for approvals	• Supervisor accesses the appraisal through Manager Direct Access then Performance Appraisal Process • You will still get error message for appraisal for same employee/dates – change * Appraisal Date to one day before the date listed • Refer to the Rejected Appraisal document online – see link below
View Email Notifications	• OPA email notifications now work just like the email notification you receive for other Oracle transactions (*e.g. timecards, leave requests, training requests...*) • Appraisal actions available via the email notification include: Approve, Reject, Request Information, Answer	• Applies <u>only</u> to supervisors and approvers • Employees cannot access/complete the appraisal using the email notification
Worklist Notifications	• Are the **recommended method of access/approval/reject** because they access and process the action on the appraisal more quickly than the email notifications *(which are now available and actionable – see above)*	• Main Appraisers can still ignore the "Appraisal of… Needs Your Attention" notification which is generated each time you start or save an appraisal
Employee Access	• Employees <u>**MUST**</u> access the appraisal via **Employee Direct Access** then **My Appraisals** then the **yellow pencil update icon** to open an actionable appraisal with working buttons and attachments	• Completed appraisals are still available via Employee Direct Access then click on My Appraisals
Refresh / Advance Stuck Screen	• Oracle sometimes appears nonresponsive. Please wait a full minute after initiating an Oracle action. If Oracle remains unresponsible, press F5 • **F5 Key**: Refreshes the appraisal/page/ site as needed. If the lower left corner shows "Done" and your button/action did not occur – press the F5 key • **Button**: If button doesn't respond or initiate the next step/window, press the F5 key to refresh the page/site	• Allow a up to a minute for the system to respond <u>before</u> using the F5 key • Rarely encountered, could happen after adding Adhoc Approver

Oracle Performance Appraisal (OPA)	**http://employees.henrico.us/**
	• **Permanent Full-Time Government Employee**
	   or: **Permanent Part-Time Government Employee**
	• **Log in to HRMS – choose;**
	   ○ **From work** (if via County equipment/computer)
	   ○ **From home** (if from personal device/computer)
	• **Use your Oracle HRMS log in and password**
	   ○ Do not use your Oracle Financials log in
	• **Manager Direct Access > Performance Appraisal Process**
	• **Employee Direct Access > My Appraisals**
		FIRE PERSONNEL:
		• **Visit the Fire Intranet site for hierarchy worksheet; building the hierarchy; and process instructions unique to Fire**

Appraisal Action	What's Notable		Additional Notes
Online Assistance	• **Employee**: 2-page Instructions/Tips; Process Instructions • **Main Appraiser (Supervisor)**: 2-page Instructions/Tips; Process Instructions; Adding Adhoc Approvers; Adding Attachments; Rejected Appraisals • **Approvers**: Action Process Instructions *(Approve, Reject, Request Information; Responses)* • **Process**: Cycle Overview and Workflows		• Updated step-by-step instructions in various formats for each user type and process are available online on the HR web site – **see link provided below**
FIRE Online Assistance	• **Visit the Fire Intranet site** for hierarchy worksheet; building the hierarchy; and process instructions		
ADDITIONAL TIPS and REMINDERS			
Limitations	**Character limit of 2000 *characters*** *(still includes all spaces and all punctuation and all the alpha and numeric characters).* **No limit on the number of attachments.**		**No spell check** – use Word for spell checking comments
Using the correct Appraisal Template:	**Annual Appraisal**: The normal evaluation, given annually, which covers approximately 26 pay periods For employees with less than one year of service (hired on/after 6/17/2023) complete an annual appraisal at this time AND THEN complete a probationary appraisal when they actually complete their first 12-months of service.		**Probationary Appraisal**: The evaluation following the initial 12-month period for a new hire in any position. **Use _only_ when the employee has completed 12-months of service.**
	Annual/Probationary Appraisal: Single form **used _only_ for employees hired on/between 4-30-2023 and 6-16-2023 that have completed 12-months of service** to complete both the probationary evaluation and the annual appraisal on just one form		**Extended Appraisal**: A follow-up evaluation given after an evaluation period has been extended
			Interim Appraisal: An evaluation given at any point during an evaluation period to provide formal feedback on an employee's performance *(recommended but not required)*
Changing Hierarchy	• If the hierarchy is incorrect, do not submit the appraisal. Cancel the appraisal and delete the saved appraisal if necessary • Submit a Human Resources Action Form to HR to change the hierarchy. Changes occur automatically in the system as soon as they are keyed by HR		• The online process uses the most current HRMS hierarchy – any change in hierarchy requires an HR Action Form • Confirm with HR changes have been keyed before submitting the appraisal
RESOURCES			
Additional Assistance	Special Assistance with Appraisals: • Bridget Cease: 501-4783 • Gretchen Jenkins: 501-4273		Questions and Technical Assistance: • Tammy Parsley: 501-7544 or par59@henrico.us • HR-ClassandComp@henrico.us
Online Resources and Updated Documentation:	http://employees.henrico.us/info/supervisors/performance-appraisal/		

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