

Performance Appraisal Instructions, Tips and Resources Appraisers and Approvers FY24 Annual Appraisals must be completed by May 24, 2024

Author	FY24 Annual Appraisals must be completed by	
Action	Instructions Access Oracle LIBMS via Employees Powtell, appropriate use	Notes
Logging In	 Access Oracle HRMS via Employee Portal: employees.henrico.us Log in using the same User Name and Password that you use for time entry and approving leave requests Click once on the "Manager Direct Access" responsibility Click once on "Performance Appraisal Process" 	 Prior to logging in, make sure you have completed all preliminary steps in the performance appraisal process and have written overall comments (and any goals) in a Word document – remember to save the document
Starting an appraisal on an employee (Step 1 of 3)	 Scroll down to the default "Standard Appraisal" field (do not change) Click on "Click here to Create NEW Appraisal!" button Choose an employee from the people hierarchy – CLICK ONCE on the "Action" icon Enter the appraisal process start date (see "Notes" column) Enter the appraisal process end date (see "Notes" column) Choose the correct appraisal template for the type of appraisal you are completing: 1) Click once on the flashlight 2) Click once on the "Go" button to return a list of templates 3) Click once on the "Quick Select" icon next to the correct template If – and only if – you are doing an appraisal for an employee and you will be extending the appraisal period, enter the last day of the extended period (e.g. extending appraisal period for 6 pay periods – enter the last day of that 6th pay period) Click once on the "Next" button 	 For an annual appraisal, enter current fiscal year start date as 17-Jun-2023 and the end date as 14-Jun-2024 For an annual/probationary appraisal, enter the start date as the employee's date of hire and the end date as the end of the current fiscal year For a probationary appraisal, enter the 12-month probationary period start (date of hire into the position) and end date (12-months after hire date) For an interim or extended appraisal, enter the start date and the end date of the time period being reviewed If rating an Employee "Needs Improvement" or "Unacceptable" you MUST enter an extended date
Appraising an employee (Step 2 of 3) Creating the appraisal (Step 3 of 3)	 Select the performance rating from the drop down list of values in the "Overall Rating" field (Click once on the drop down arrow) Enter (or copy/paste) comments on the employee's performance and any goals in the "Overall Comments/Upcoming Goals" field Once all your comments and goals are added, review carefully, then click once on the "Next" button Carefully review the comments and goals in the "Create Standard Appraisal: Review" summary page in Step 3 of 3 If you need to make changes, click once on the "Back" button If the entries are correct, click once on the "Apply" button to merge the data you entered with the template and get a "Confirmation" view of the appraisal for final consideration To make a change, click once on the "Update Appraisal" button, make the change, then click once on the "Continue" button and then click once on the "Apply" button To proceed with obtaining the necessary approvals, click once on the "Give Final Ratings" button to get one more look at an editable version Review carefully for any cut and paste errors (e.g. gobbly gook characters), correct any errors, then click once on "Continue" button On the next "Give Final Ratings: Review" page: Review list of Approvers and confirm hierarchy is correct To add an approver (e.g. previous supervisor) click once on the blue plus sign icon to start the process – NOTE – you MUST click on the "Add" button to insert the Adhoc Approver into the list. SEE NOTES >>> To add an attachment that will be available to all participants: Click once on the "Add" button in the "Additional Information" section near the bottom of the appraisal to start the attachment process (same process as adding an attachment to an email) SEE NOTES >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	 The capabilities used for rating employee's performance are listed above the overall rating section - Click once on the "i" bubble for additional information about behavioral anchors for each capability The five rating choices have not changed Add Adhoc Approver: Click once on the blue plus sign icon Click once on the magnifying glass icon Enter the last name of the Adhoc Approver followed by the % wildcard in the "Approver" open text box Click once on the "Go" button for list of names Click once on the "Quick Select" icon next to the correct name to select the approver Choose where (who) the Adhoc Approver should be added before (insertion point) Click once on "CLICK HERE TO ADD ADHOC APPROVER" button CRITICAL: If you add multiple approvers, and added an approver incorrectly, you must delete all Adhoc Approvers in numeric order then readd them into the hierarchy Adding Attachments -click on the Add button: Use the default add option "Desktop File/Text/URL" Enter brief title of the document Click once on the "File" button Click once on the "Browse" button and navigate to the document Double click on the document and then click once on the "Apply" button Confirmation will appear at the top of the page. Repeat for multiple attachments. Press the F5 key if a button does not respond and Press the F5 key if a button does not respond and Press the F5 key if a button does not respond Press the F5 key if a button does not respond
Approver Hierarchy Access Appraisals	 Access HRMS via Employee Portal: http://employees.henrico.us/govt-ft/ Log in using the same User Name and Password that you use for time entry and approving leave requests Click on the appraisal notification https://employees.henrico.us/govt-ft/ Click on the appraisal notification https://employees.henrico.us/govt-ft/ Click on the appraisal notification https://employees.henrico.us/govt-ft/ Review the "Overall Ratings, Comments and Upcoming Goals" section 	 The street is key in a button does not respond and then click the button again. F5 refreshes the page. The approval process follows the authority hierarchy for each department Approval is required of each person in the approval hierarchy. Only approved appraisals are shared with the employee.

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Action	Instructions	Notes
Approve the	Review rating, comments and any attachments	After clicking on Approve , the appraisal is
appraisal	 Click once on the "Approve" button Note: An approver can add a message/information to the appraisal keying it into the open text box in the "Response" section <u>before</u> cli once on the "Approve" button. Messages are only visible to the app during the approval process. 	forwarded to the next approver in the list Notifications are sent to the supervisor's (Main Appraiser) worklist throughout the process Appraiser worklist potification is sent to the payt
Reject the appraisal	 APPROVER: Click once on the "Reject" button: The appraisal is return immediately back to the Main Appraiser's "Performance Appraisal Process" responsibility with a yellow pencil icon for access MAIN APPRAISER: Access the rejected performance appraisal throu "Performance Appraisal Process" responsibility using the yellow pericon. Then click on the "Update Appraisal" button and make the new revisions. Re-submit for the necessary approvals. See Notes >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	appraisal, revise the attachments before starting a new appraisal. Note: If you get an error message you may need to change the *Appraisal Date. • If changes are in the comments text: Click on the "Update Appraisal" button and an editable appraisal opens. Edit the appraisal and resubmit.
Request Information	 Click once on the "Request Information" button Choose the workflow participant from the drop down list (note: you only select Approvers who have already reviewed the appraisal) Add a note to the "Information Requested" text box then click the "Submit" button "Request Information" initial request and related back/forth replies sent to and accessed through the Worklist (More Information Requested) 	To respond to a request, use the worklist notification. Enter your response in the "Answer" text box in the Response section then "Submit" This action is an online dialogue between the two parties only Once completed, the exchanges are visible to all
Providing the appraisal to the employee	 As soon as the Agency Head (e.g. Director, Chief) approves the approventhe appraisal is immediately transferred to the employee's Worklist employee's review and comment The supervisor (Main Appraiser) is notified via the Worklist 	
Completing the process	 Employee accesses the appraisal through "My Worklist" using the "Employee Direct Access" responsibility, reviews it + adds comment Employee clicks once on the "Submit" button. The online process is closed and the Main Appraiser receives a notif in "My Worklist" Supervisor schedules time to discuss the appraisal with employee 	appraisal and before the employee provides
TIPS		Theratery batton
Limits Attachment Using the correc Appraisal Template:	Character limit of 2000 characters (includes spaces) Can attach multiple documents to the appraisal Annual Appraisal: The normal evaluation, given annually, which covers approximately 26 pay periods Annual/Probationary Appraisal: Single form used only for employees hired on or between 4-30-2023 and 6-16-2023 that have also completed 12-months of service — use/complete just this appraisal for both the probationary evaluation and the annual appraisal (serves as both in just one appraisal)	Name each attachment with the Fiscal Year (e.g. FY24) Employee's name (e.g. Higgins) content (e.g. Goals) Probationary Appraisal: The evaluation following the initial 12-month period for a new hire in any position 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 (recommended but not required) to provide formal feedback on an employee's performance
Changing	Submit an Human Resources Action Form to HR – changes	The online process uses the most current HRMS hierarchy
Hierarchy Employee doesn have computer access	occur automatically in the system when they are keyed by HR	 HR will close the online appraisal process and scan the printed appraisal into the employee's official personnel file The Main Appraiser should provide the employee with a copy of the signed appraisal if the employee requests a copy
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 Email: HR-ClassandComp@henrico.us
Online Resource		· · · · · · · · · · · · · · · · · · ·

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