2026 Annual Appraisal Instructions for Supervisors

This document covers Annual Appraisals, which are required for most Full-time and Permanent Part Time Henrico County employees hired on or before April 30, 2026.

Employee specific procedures can be found here:
2026 Annual Appraisal Instructions for Employees

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County-Wide Appraisal Dates

The organization-wide Annual Appraisal schedule is below. Leadership may set additional timeline dates or earlier deadlines. **Please comply with any additional timeline instructions from your leadership. Human Resources (HR) strongly encourages completing appraisals early.** Any missing or unapproved appraisals will be reported to Agency Heads.

Table 1 2026 Annual Appraisal Schedule

Date	Item
June 14,2025	Evaluation period start date
June 12, 2026	Evaluation period end date
March 15, 2026	Appraisal process begins
May 1, 2025	Cut-off date; Employees hired between this date and 13-Jun-2025 complete an Annual/Probationary appraisal.
Consult Dept Leadership	Supervisor Oracle appraisal deadline
May 22, 2026	Employee Oracle appraisal acknowledgement deadline (by 4:30pm)

Annual Appraisal Explanation

The annual appraisal process provides an opportunity to:

- **Intentionally consider individual contributions and performance.**
- **Consider opportunities for improvement and development**.
- **Determine the focus of the coming year and any professional goals.**

The cornerstone of the process is an intentional performance conversation between a worker and their supervisor. Conversation highlights are documented in a written appraisal. Appraisals are official personnel records and may be referenced for performance improvement, compensation, or other personnel purposes. Departments and supervisors may have specific performance-related procedures.

Timely annual appraisals are mandatory for most Full Time and Permanent Part Time employees. Those hired after the new-hire cutoff date are excused.

General Process

1. **Follow any special instructions from your leadership.** The general annual appraisal instructions apply to most workers. However, your leadership may communicate extra internal deadlines, request specific information, or relay other nuances.
2. **Tell your subordinates what to expect.** Explain the process and timelines. If you want your subordinates to supply any information before the appraisal, give them ample notice and a clear due date.
3. **Prepare appraisals for your subordinate(s) offline.**
    a. Determine a rating. Choose a rating based on objective measures, such as service metrics, volume of work, or stakeholder feedback. Also consider extent to which a worker embodied one or more of the County Capabilities. Ratings must be individualized. Do not routinely assign any particular rating. Over-rating or under-rating is unfair to the worker and can harm workplace culture. Try to avoid “recency bias;” ratings should reflect worker performance over the entire evaluation period. Read the guidance below about each rating.

Rating	Level	Comments
1	Unacceptable	Worker performance is significantly and consistently below standards. Typically, the worker has failed to satisfy a performance improvement plan and is at risk of termination. **The supervisor must communicate with Employee Relations prior to assigning.**
2	Needs Improvement	The worker has significant performance concerns. Often, the employee has an active performance improvement plan and/or multiple events of discipline and has not made notable progress in resolving the issue(s). **The supervisor must communicate with Employee Relations prior to assigning to rating.**
3	Satisfactory	Worker performance consistently meets all requirements and competency standards.
4	Above Expectations	Worker performance is above requirements and frequently adds value beyond assigned tasks.
5	Outstanding	Worker consistently exceeds goals, acts as a role model, and provides exceptional contributions. **The supervisor should reserve this rating for workers who regularly and consistently go "above and beyond."**

b. Prepare a narrative explaining the rationale for the rating. Microsoft Word is recommended. Briefly describe any objective measures, such as service metrics, volume of work, or stakeholder feedback. You must write about how your employee embodied at least one County Capability. Narratives should be longer than a sentence and should be useful to the worker. Your leadership, human resources, and the worker will see your narrative, and it will become an official personnel record. Please proofread it carefully.

4. **Submit the appraisal in Oracle.** Detailed instructions follow.

5. **Monitor Oracle for notifications about the appraisal's approval or rejection.** If rejected, correct it and resubmit. If your appraisal was rejected because you chose the wrong template, you must delete the appraisal and start over. If you need to make a correction to an attachment, you must delete the appraisal and start over.

6. **Once approved, engage in a meaningful performance conversation with your subordinates**.

    a. You should initiate these conversations. Conversations are not prescribed, and may vary based on the position, unit, and department. They may include work related performance and contributions, areas for improvement,

expression of County values, upcoming work goals, career goals, training or support and other performance-related matters.

Technical Instructions: Create an Appraisal in Oracle (Main Appraiser role)

1. **Prepare the appraisal narrative in a Word document (strongly recommended).**
    a. Prepare a narrative that explains the rational for the rating. See the preceding "General Process" section for detailed instructions.
2. **Navigate to Oracle log-on portal. Use the HR Module and not the financial module.**
3. **Enter your Oracle Username and Password.**

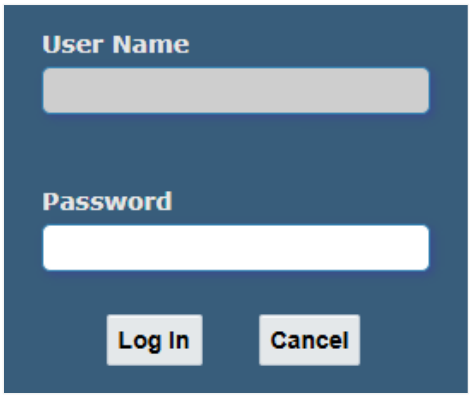

Figure 1 Oracle Log-in Screen

4. **Click the three lines in the upper left-hand corner of the screen.**

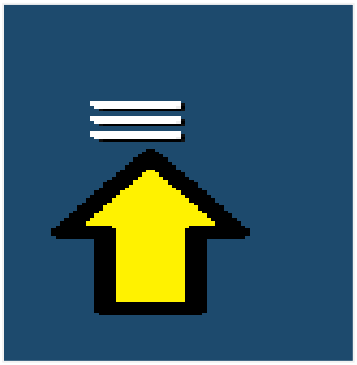

Figure 2 Menu icon

5. **Click “Manager Direct Access.”**

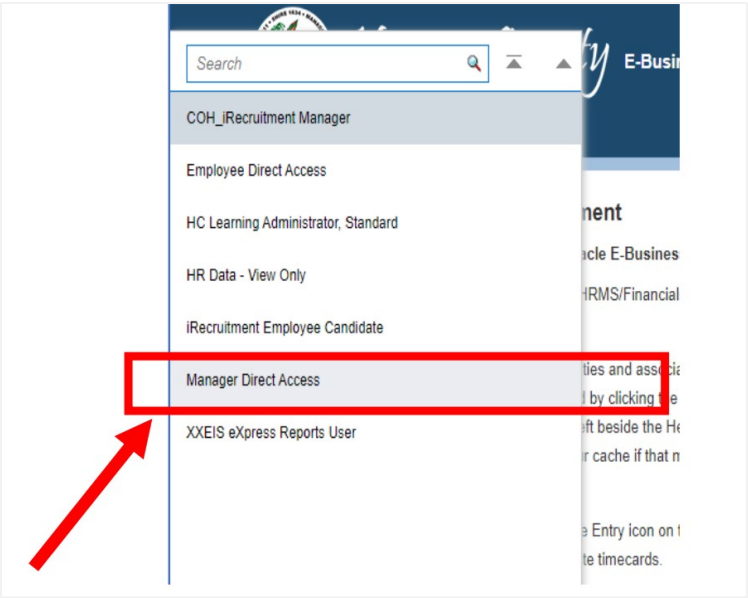

Figure 3 Manager Direct Access

6. **Click Performance Appraisal Process, which appears in a sub menu**.

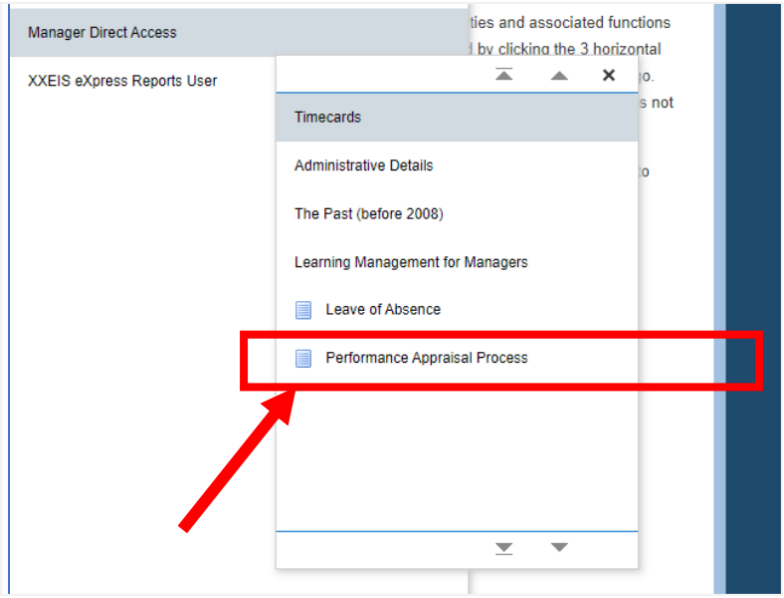

Figure 4 Performance Appraisal Process

7. **Scroll then click button “Click Here Create New Appraisal”**

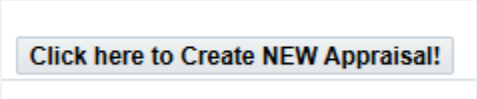

Figure 5 Create new appraisal button

8. **Look for the Employee you wish to evaluate. Under the Action column, click the icon to start the appraisal.**

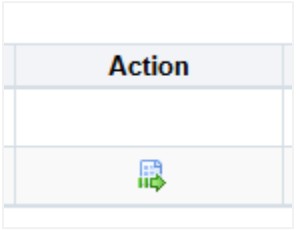

Figure 6 Action Icon

9. **In the Appraisal Process Start Date field, use the date-picker to choose whichever is later, the start of the performance period (6/14/2025) or the employee's start date.**

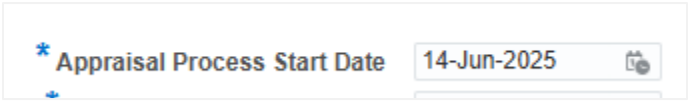

Figure 7 Appraisal Start Date Field

10. **In the Appraisal Process End Date, use the date-picker to choose the end of the performance period (6/12/2026).**
11. **Click the magnifying glass next to the Template, field, then type a percentage sign, then click "Go."**
    a. **Select the Annual Appraisal, unless the employee started between May 1, 2025 and June 13, 2025.**
    b. **Then click the "Select" button.**

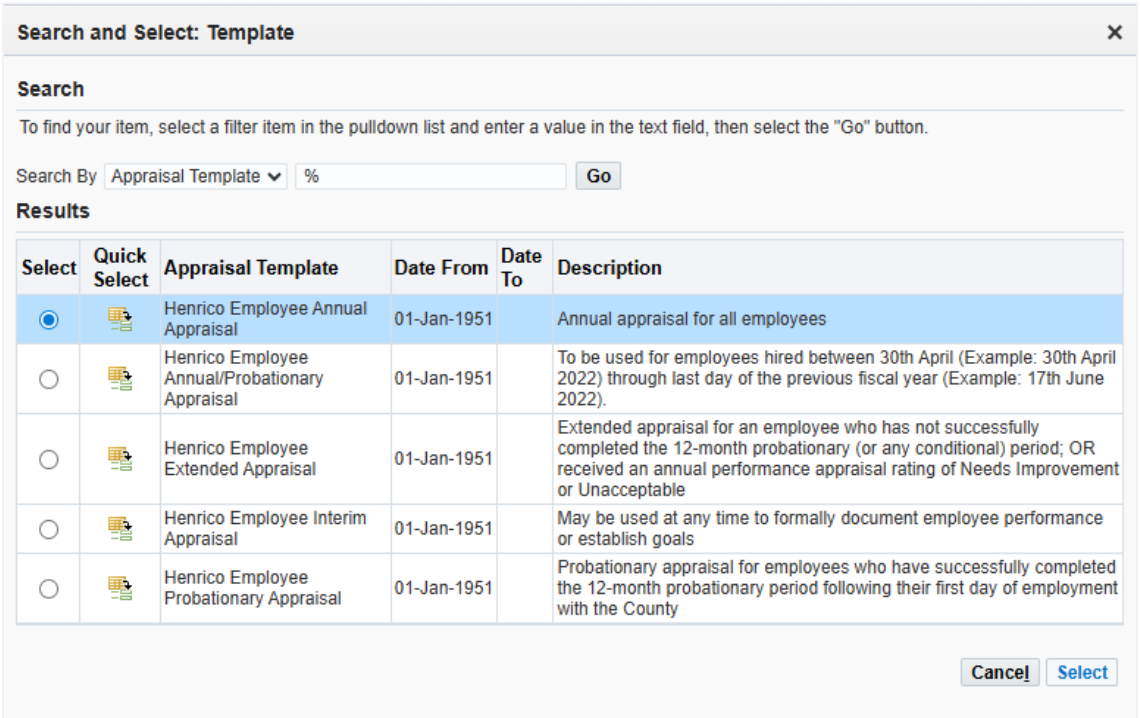

Figure 8 Image of Screen to Select Template Type

12. **Leave the appraisal date as today's date unless you previously deleted an appraisal for the same employee today. In that case, choose tomorrow's date.**

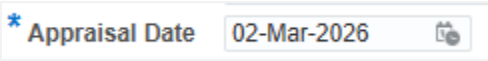

Figure 9 Appraisal Date field

13. **Click the Next button in the upper right-hand corner.**

Figure 10 Next Button

14. **Choose an overall rating from the dropdown**

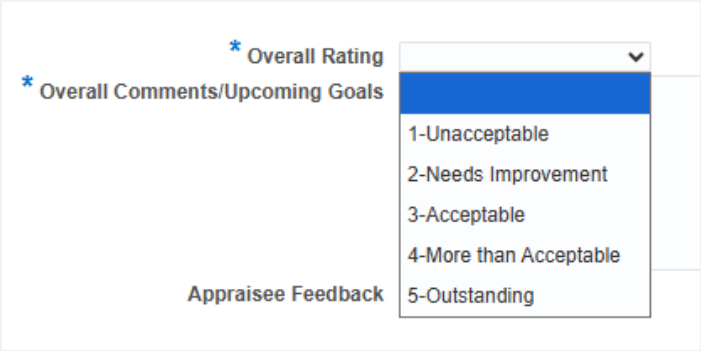

Figure 11 Ratings Drop Down

15. **Type text in the Overall Comments/Upcoming Goals box.**

    a. Note that Overall Comments/Upcoming Goals box has a character limit of 2000 characters.

    b. Oracle does not have spell check. Please consider writing and editing most substantive content in a Microsoft Word document. Word documents can be uploaded to the appraisal later in the process. One can type "See Attachment" in the text box.

Figure 12 Overall Comments/ Upcoming Goals Field

16. **Click "Next" Button in lower right screen.**

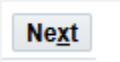

Figure 13 Next Button

17. **Click "Apply" Button in the upper right screen.**

Figure 14 Apply Button

18. **Review work, if correct click “Give Final Ratings.”**

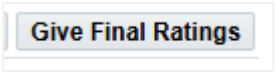

Figure 15 Give Final Ratings Button

19. **Click “Continue” in the upper right.**

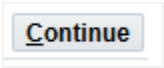

Figure 16 Continue Button

20. **Add an attachment if applicable (highly recommended) by scrolling to the green plus sign, clicking that sign, typing a document title, clicking “Choose File” and then uploading your attachment, and then clicking “Apply.”**

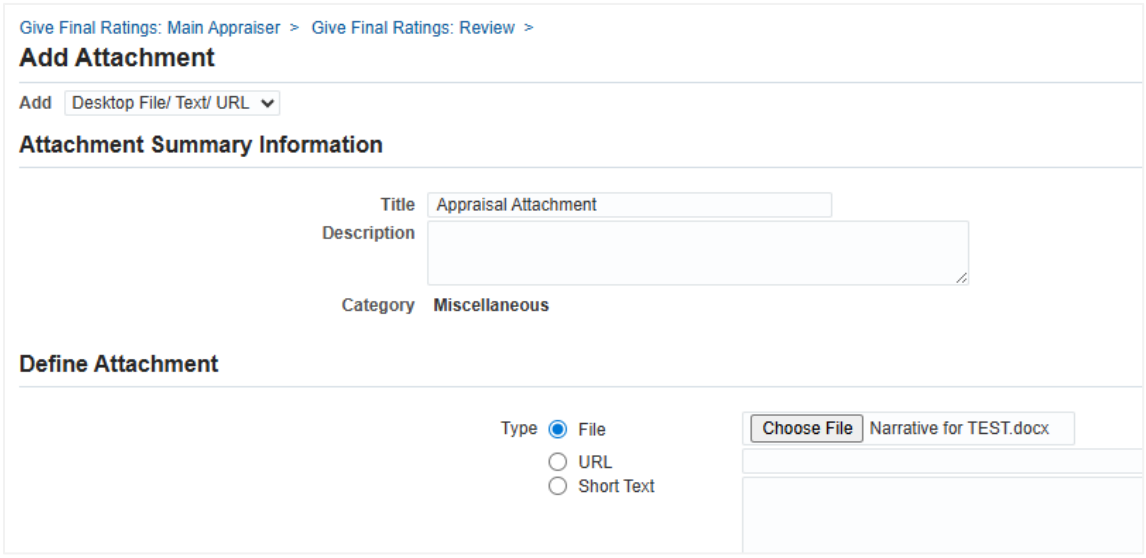

Figure 17 Add Attachment Screen

21. **Click “Submit” in the upper right.**

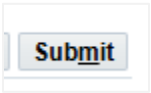

Figure 18 Submit Button

Troubleshooting and Tips

Appraisal Content Assistance

For questions and challenges related to the content of appraisals or performance concerns, call Bridget Cease at 804-501-4783 or Gretchen Jenkins at 804-501-4273.

Appraisal Technical Assistance

For Oracle Appraisal Modules issues that are not addressed by the troubleshooting guide, email HR-ClassandComp@henrico.gov (preferred) or call Tammy Parsley at 804-501-7544.

Changed Supervisors and or Positions During the Appraisal Submission Period

Usually, whichever supervisor is active during the appraisal submission period prepares the appraisal. In some cases, a former supervisor may provide input to the new supervisor to help inform the appraisal. Your current supervisor is responsible for any necessary coordination and may contact Human Resources for help.

Extended Leave

If you took extended leave during the evaluation period, including medical, parental, military, or otherwise, and you return to work before the end of the appraisal submission period, you should participate in the Annual Appraisal process. If extenuating circumstances exist, contact Employee Relations at 804-501-4273.

Forgotten Oracle Password

Call the IT Support Desk at 804-501-4357 and request a password re-set or click on “Login Assistance” on the Oracle login page.

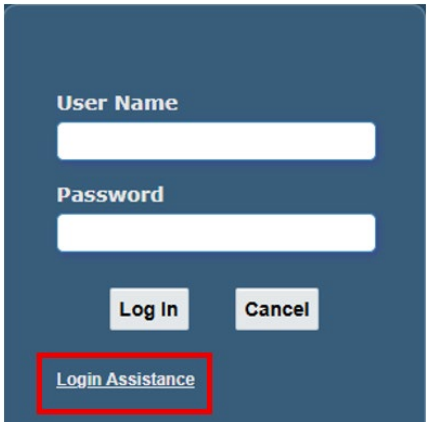

Figure 19 Login Assistance

Newly Hired

You must complete an Annual Appraisal for covered employees hired between June 14, 2025, and April 30, 2026. Management understands that contributions of newly hired employees may be limited. The evaluation period starts on the hire date. Anyone hired after May 1, 2026, does not complete an Annual Appraisal for this year.

Employee Does Not want to Acknowledge Appraisal

Explain to the employee that acknowledging the appraisal in Oracle is a job requirement. Acknowledgement does not mean agreement. The employee may submit feedback that reflects their view about the appraisal, and that feedback becomes part of the official records (see Employee procedures). Be prepared to discuss the appraisal and to provide examples of any referenced behaviors.

Chose Incorrect Appraisal Template

Unfortunately, the system cannot alter a template after selection. If you selected the incorrect template, delete the appraisal and start again using the correct template.

Oracle Access Challenges

Oracle works best with Chrome or Mozilla Firefox browsers. If you encounter difficulties accessing Oracle, try one of the preferred browsers. If you need more help, contact Information Technology Support Desk via (804) 501-4357 or helpdesk@henrico.gov

Oracle Appraisal Module Viewing Challenges

Viewing issues may be due to a popup blocker. You can proactively check for problematic blockers by visiting Oracle and clicking on the Flashlight icon or Calendar icon. If you see a pop-up blocker message, change your internet settings to “Always allow Pop-ups on this site. If you have a Google or Yahoo toolbar installed, you may need to turn on the “Always Allow” setting. Please contact Information Technology Support Desk if you require help turning off pop-ups via (804) 501-4357 or helpdesk@henrico.gov

Reasonable Accommodations

If you require reasonable accommodation to complete an appraisal process due to a disability, please contact your supervisor or Human Resources at 804-501-4273.

Return to an Active Oracle Appraisal Later

If you need to exit an active appraisal, you can simply close the appraisal module or close Oracle entirely until you are ready to revisit.