Create a Direct Report Appraisal

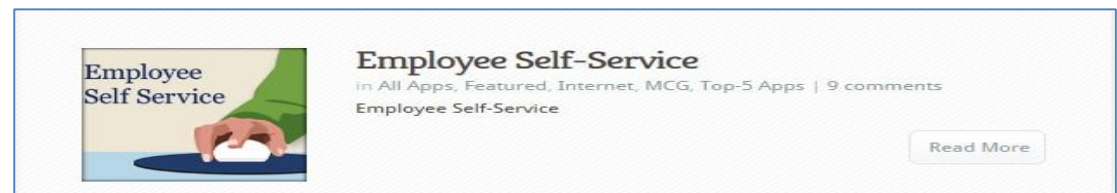## Step-by-Step Instructions

Step 1   Open an **Internet Browser**.

Step 2   Navigate to **eportal.montgomerycountymd.gov**.

Step 3   Sign In to **accessMCG**.

UNAUTHORIZED ACCESS IS PROHIBITED AND PUNISHABLE BY LAW!
Welcome to Montgomery County, Maryland - Single Sign On

User Name:

Password:

Log In

Forgot Password?   My Account
Unlock My Account   Change My Password

accessMCG
application portal

Step 4   The *ePortal for County Systems and Applications* page opens.

Step 5   Click the **Employee Self-Service** option.

Employee Self Service

Employee Self-Service
in All Apps, Featured, Internet, MCG, Top-5 Apps | 9 comments
Employee Self-Service

Read More

Step 6   Click the blue **Go to Employee Self-Service** button.

Go to Employee Self-Service

Step 7   Your *Oracle eBusiness Homepage* opens.

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Step 8   Click your **MCG HR Manager Access** link that's located in the Navigator section of your **Oracle eBusiness Homepage**.

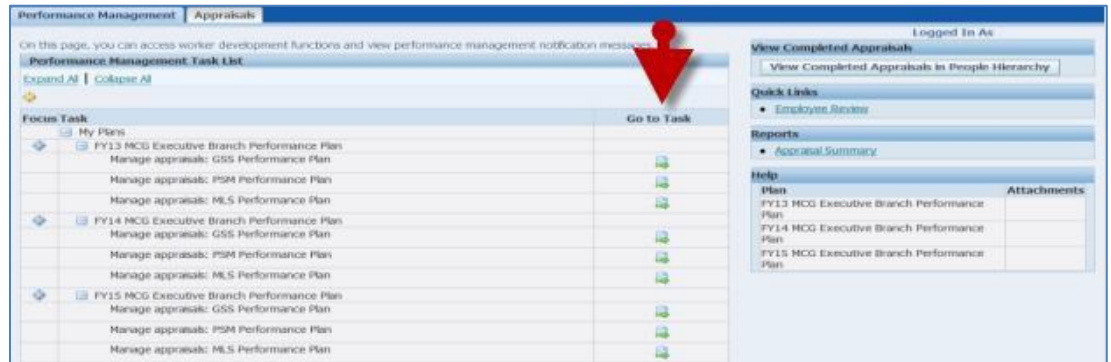**Step 9**   Click the **Performance Management** link that now displays at right.

Step 10   Locate the **Performance Management Plan** in the Focus Task section for the appropriate fiscal year.

IMPORTANT: Be careful to select the Plan for the <u>correct</u> fiscal year.

Due to the combination of fiscal, increment and calendar year employees, plans are open for an extended period. As such, you'll see multiple years of Performance Plans in the Task List.

Step 11   Click the **Go to Task** icon to the right of the Performance Plan group (GSS, MLS, or PSM) to which the desired direct report appraisal belongs.
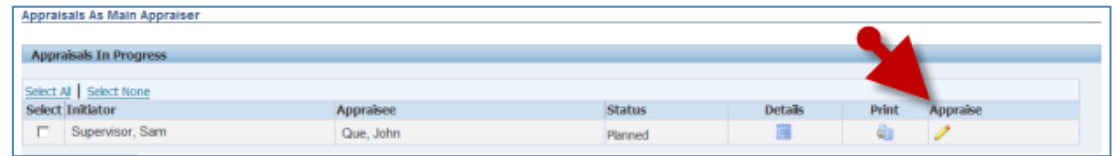

Step 12   The *Appraisals As Main Appraiser* page opens.

NOTE: The 'Appraisals in Progress' section displays only direct report appraisals that belong to the selected Performance Plan group.

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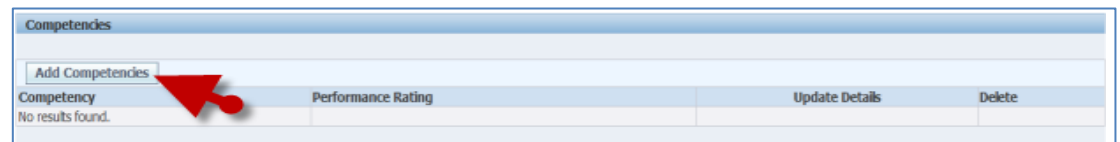|		
Step 13	Click the **Appraise** pencil icon to the far right of the desired appraisal.	
Step 14	The *Update Standard Appraisal: Overview* page opens.	**IMPORTANT:** The status of the appraisal determines the first page to display. After publication, the first appraisal status is 'Planned'. Therefore, the appraisal has opened to the editable page. If the appraisal were in some other status, it would open to a view-only, review page where the 'Edit Appraisal' button would be required to advance to the editable page.
Step 15	**You are now in the appraisal.** The appraisal is one page. To build, you will start with the top section and scroll down as each of three (3) required sections (Competencies, Objectives, and Career Development) is completed.	

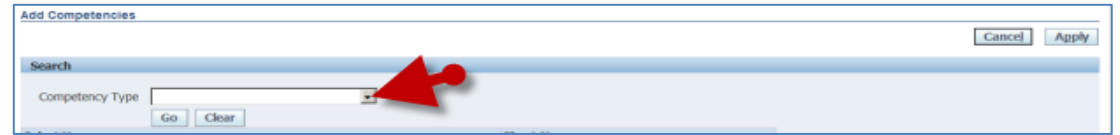| **Competencies Section**	▪ <u>MLS and PSM</u> Competencies are preloaded. ▪ GSS Competencies **must** be selected by the supervisor. ▪ When creating a GSS appraisal, the Competencies from which to select are grouped into suites by employee type (GSS Supervisor and GSS employee) for ease of selection. This ensures that any Competency selected within a particular suite has already been evaluated as appropriate for that employee type.

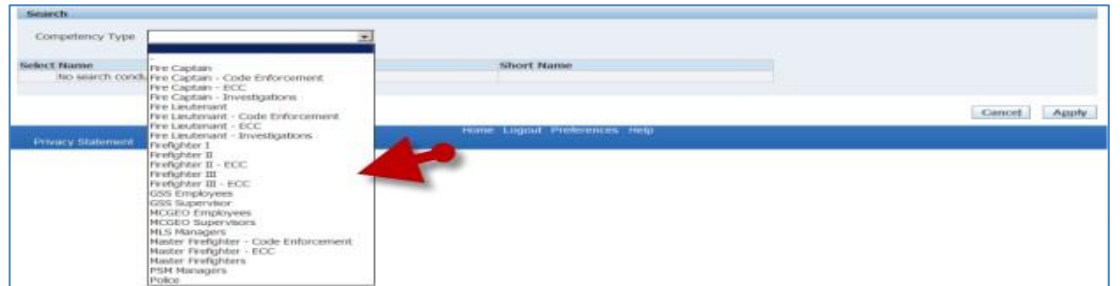|		
Step 16	**MLS and PSM Appraisals Only:** Skip to the **Objectives Section**.	
Step 17	Click the **Add Competencies** button in the Competencies section located toward the top of the page.	

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Step 18   Click the Competency Type **Drop-down** button.
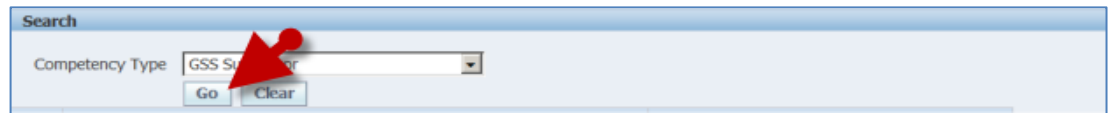
Step 19   Select the <u>appropriate</u> **Competency Type** for the employee you are creating the appraisal for.

> **IMPORTANT:** You <u>must</u> select the option that matches the category of the employee.

Step 20   Click the **Go** button. This will display all the Competencies appropriate for the employee type selected.
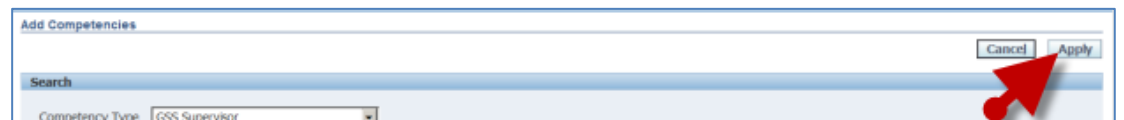
Step 21   Click the **Checkbox** left of all the Competencies you wish to add to the appraisal.

> **NOTES:**
> - 'Safe Work Environment' is <u>required</u> for all employees.
> - OHR recommends no more than 4-5 competencies.
> - Use the Previous/Next navigation links to scroll through all competency options.

Step 22   Click the **Apply** button.

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Step 23	You are returned to the main appraisal page (*Update Standard Appraisal: Overview* page) where the Competencies you selected now display.	**IMPORTANT** ■ Choose carefully. **Competencies cannot be deleted once the appraisal is sent to the employee.** ■ Use the *Trash Can* icon, if active, to delete. ■ Use the *Update Details* pencil icon to enter comments. ■ Remember: Select the 'Safe Work' competency. It is required.

Objectives Section	■ There are two methods of adding Objectives to an appraisal: create new Objectives or copy Objectives from a prior appraisal(s). ■ This Quick Start Guide will cover how to create new Objectives. ■ *To copy past objectives*, refer to 'Quick Start – Copy Past Objectives to a Current Appraisal'.

Step 24	Scroll to the **Objectives** section of the appraisal. It is immediately below the Competencies section.	

Step 25	To create a *new* Objective, Click the **Create New Objectives** button in the Objectives section.	

Step 26	Enter an **Objective Name**, **Start Date** and **End Date**. **NOTE:** Optionally, you may also select a *Priority* (Low, Medium, or High)	

Step 27	Enter the desired information into the **Detail** and **Success Criteria** fields. **NOTE:** ■ Use the 'Detail' field to define the objective. ■ Use the 'Success Criteria' field to outline how the Objective will be measured	

Step 28 Skip the **Rate Appraisee on this Objective** section until the end of the performance review period.

Step 29 Click the **Apply** button.
NOTE: Alternatively, you may click the 'Apply and Create Another' button to create additional Objectives to add to the appraisal. Then, click the 'Apply' button after you have created the last Objective.

Step 30 You are returned to **Update Standard Appraisal: Overview** page where the Objectives you created now display.

IMPORTANT
▪ Use the *Update Details* pencil icon to edit your entries.
▪ It is not customary to add comments at the beginning of the year.
▪ If you choose to add comments, note that Objectives with comments added cannot be deleted once the appraisal is shared.

Learning Path Section	Skip this section. The Learning Path section links to the Oracle Learning Management (OLM) module which is not currently being used in the Performance Management Process. For now, you may skip this section.
Participant Section	Skip this section, in most cases. If needed, contact OHR. A Participant is one or more third-parties (only another supervisor or project lead) a supervisor may invite to provide feedback on an employee's performance. When creating an appraisal at the beginning of the year, it is not customary to add a Participant. **NOTE:** If an employee changes supervisors during the plan period, the prior supervisor will automatically be added as a Participant. However, they can only provide feedback if invited by the current supervisor.
Career Development Section	The Career Development field is a textbox in which you may enter a Career Development goal(s) for your direct report. The employee has a similar field to offer career goal suggestions.

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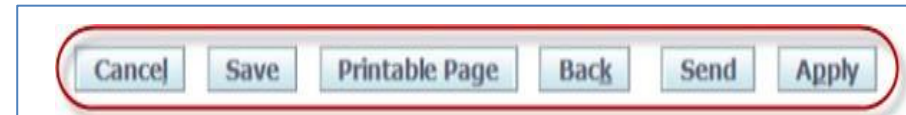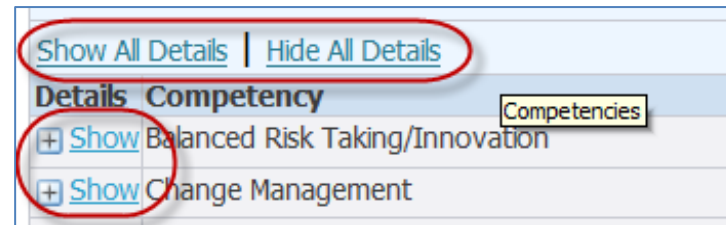|		
Step 31	Scroll down to the **Career Development** section toward the bottom of the page.	
Step 32	Enter a development goal into the **Career Development (Manager)** textbox. **IMPORTANT:** At least one (1) Career Development goal is required.	
Step 33	Click the **Continue** button.	
Step 34	**Review** your work. **NOTE:** ▪ Display/hide details <u>individually</u> using the **+Show/-Hide** links. ▪ Display/hide <u>all</u> details using the **Show All Details/Hide All Details** links ▪ Use the Oracle navigation buttons to cancel, save (save and continue working), print, go back a page, send the appraisal to the **employee only**, or apply (save changes and exit the appraisal). ▪ Never use the browser's Back button to navigate Oracle.	

Step 35

    A. *If you now wish to send the appraisal to the employee for their review,*

        1. Click the **Send** button. Once clicked, the *Share Appraisal Details with Appraisee* page displays.

        2. Enter any desired comments in the 'Notification Message to Appraisee' textbox.

        3. Then, click the **Submit** button.

    For more detailed instructions, refer to 'Quick Start – Send a Direct Report their Appraisal'

    B. *Alternatively, if you wish to save, retain possession of the appraisal and exit,*

        1. Click the **Apply** button located in the upper and lower right of the page.

        2. Once clicked, you're returned to the *Appraisals as Main Appraiser* page where the status of the appraisal has changed to 'Ongoing with Main Appraiser'.

    End of Procedure.