Workforce Performance Management (WPM) Functional Oracle Training for Supervisors

Office of *Human* Resources

Supervisor's WPM Process and Workflow

Phase I:

Create an appraisee's (employee) performance plan in Oracle WPM.

Send an appraisee his/her performance plan for review.

Phase II:

Send an appraisee his/her performance plan for interim (mid-year) updates.

Enter 'mid-year' performance progress comments.

Phase III:

Enter annual ratings on an appraisee's appraisal.

Share a hard copy of an appraisee's evaluation with the Approver (reviewing Official).

Send an appraisee's evaluation to the Approver electronically.

Tip and Trick!

For Easy access to Oracle WPM…

- *Add/bookmark the Oracle Self-Service (ESS) ePortal log-in to your Favorite Bar.*

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

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Phase I: Create an Appraisal

Locate the Appraisal

- *Within the first 45 to 60 days of each performance review cycle:*

  - Navigate to your Oracle Homepage and log in.

  - Click the **Employee Self –Service option** *and* the **Go to Employee Self –Service** button.

  - Click the **MCG HR Manager Access** link.

  - Click the **Performance Management** link.

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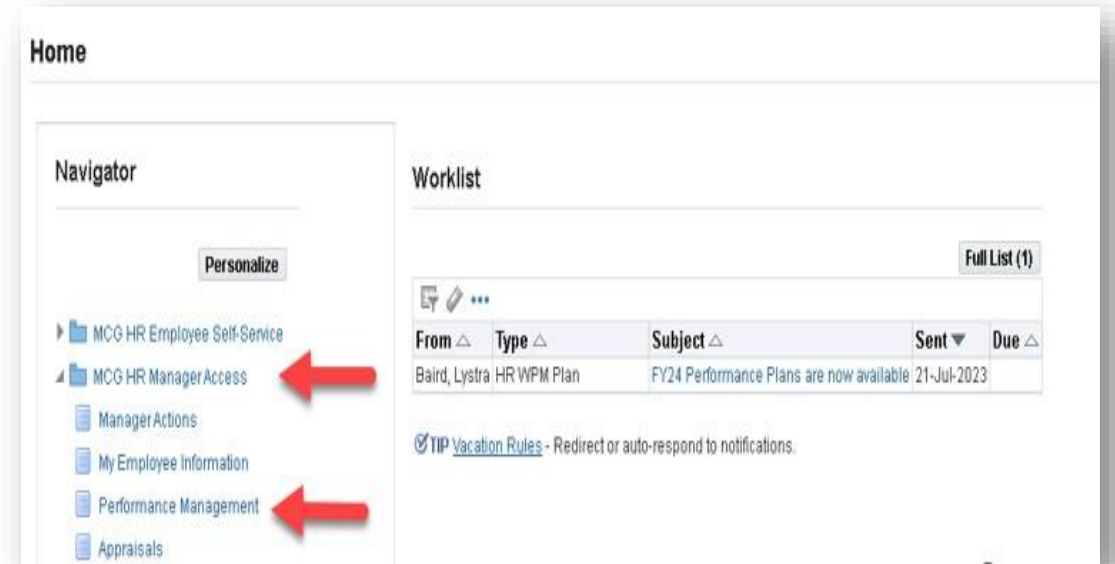
Phase I: Create an Appraisal

Locate the Appraisal

- Click the appropriate **Go to Task** icon

  - FYXX plan year and employee type: GSS, MLS, PSM).

  Note: *A list of your direct report employees show in the **Appraisals in Progress** section of the Appraisals As Main Appraiser page with a '**planned**' status.*

Phase I: Create an Appraisal

Locate the Appraisal

- Click the **Appraise pencil** icon to access and build a performance appraisal *with input from the employee*.
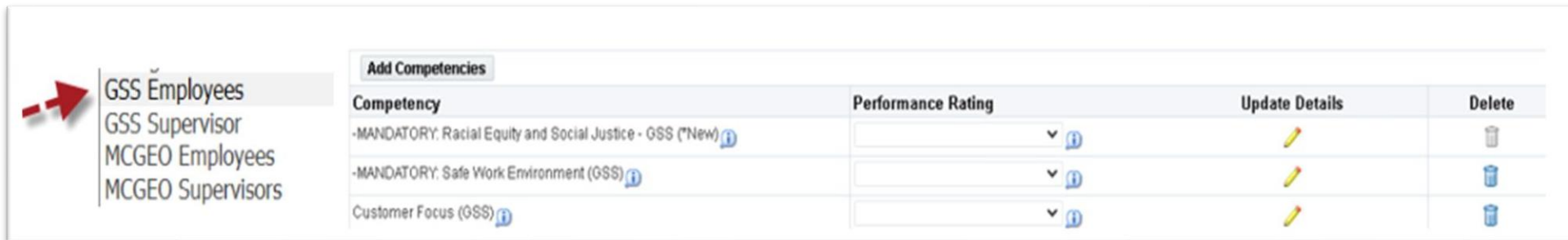

Appraisals In Progress

	Appraisee	Status △	Appraise
☐	Employee, One	Planned	✏️

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Tip and Trick!

Number of Competencies to apply to an appraisal…

- *OHR recommends no more than four (4) or five (5) Competencies, <u>in addition to the mandatory competencies</u>.*

- ***Choose carefully!*** *Competencies cannot be deleted once the appraisal is shared with the employee.*

Phase I: Create an Appraisal

Add Competencies

- Click the **Add Competencies** button.
  - *Note*: MLS and PSM competencies auto-populate.

- Click the **Competency Type Drop-down** button.

- Select the appropriate **Competency Type.** (*GSS, GSS Supervisor, etc.*)

  Note: *The selected Competency Typepopulates on the Search page.*

- Click **Go**.

Phase I: Create an Appraisal

Add Competencies

- Click the appropriate **Competency Checkbox(s)**.

    Mandatory Competencies:

    - *All Employees:* **Work Safe Environment**

    - *All Employees:* **Racial Equity and Social Justice**

    - *All Supervisors and Managers:*
      Work Safe Environment,
      Racial Equity and Social Justice,
      Performance Management
      and **Equal Employment Opportunity**

- Click the **Apply** button to apply the competencies to the current appraisal.

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Tip and Trick!

Create *New* Objective

Number of Objectives applied to an appraisal…

- *OHR recommends no more than four (4) or five (5) objectives.*
- *Objectives are based on job/position responsibilities.*

Phase I: Create an Appraisal

Create *New* Objectives

- Scroll down to the **Objectives** section.

- Click the **Create New Objectives** button.

- Enter the **Objective Name, Start Date and End Date.**

- Enter the objective description in the **Detail** field.

- Enter the targets/measurements in the **Success Criteria** field.

- Click the **Apply and Create Another** button to create additional objectives.

- Click the **Apply** button when all objectives have been created.

Phase I: Create an Appraisal

Copy *Past* Objectives

- Click the **Copy Past Objectives** button.

- Click the **magnifying glass** icon next to the desired **Search Criteria** i.e. **Plan Name**.

- Click **Go**.
  - The **Search and Select: Plan Name** page opens.

Objectives

| Create New Objectives | Copy Past Objectives |

Copy Objectives

Use the fields below to search for this emp pre\s. At least one fielced in therch underscore (_).

Search

Note that the search is case insensitive

Objective Name		Start Date	
Assignment		End Date	
		Priority	
Plan Name			
Created By			

Go   Clear

Tip and Trick!

Do not enter text in the 'search by' field.

- *Just click the **Go** button next to the textbox.*

What should you do if the selected Search Criteria does not give the expected results?

- *Select another Search Criteria option, i.e., **Assignment**, then click the **Go** button next to Assignment.*

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Phase I: Create an Appraisal

Copy *Past* Objectives

- Click **Go** on the **Search and Select Plan Name** page.

- Select the **performance plan** that contains the objectives you want to copy
  - i.e., *FY2X MCG Executive Branch Performance Plan*.

- Click the **Quick Select** icon located to the left of the Performance Plan name.

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Phase I: Create an Appraisal

Copy *Past* Objectives

- The selected performance plan populates.

- Click **Go**.

Copy Objectives

Use the fields below to search for this employee's pre... At least one field used in thro... underscore (_).

Search

Note that the search is case insensitive

Objective Name		Start Date
Assignment		End Date
		Priority
Plan Name	FY20 MCG Executive Br...	
Created By		

Go   Clear

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Phase I: Create an Appraisal

Copy *Past* Objectives

- The past objectives populate on the **Copy Objectives page**.

  - Click **Select All** to select all past objectives *or*

  - Click the **Checkbox(s)** next to the desired objectives.

  - Click **Apply**. The past objectives are applied to the current appraisal.

Tip and Trick!

Pay attention to the objective dates, especially the End Dates.

- Objective dates **must** be updated to the current performance period dates: **01-Jul-20XX** to **30-Jun-20XX**.

- Placing your cursor behind the date to be corrected; backspace and enter the correct date **or**

- You may correct the date using the calendar.

Phase I: Create an Appraisal

Update *Past* Objectives

- Click the first **Update Details** pencil icon to **upda**te the first objective.
  - **Start Date** and/or **End Date**
  - **Objective content** (as needed).

- Click the **Apply and Update Next button** to update the other objectives.

- Click **Apply** when all objectives have been updated.

Phase I: Create an Appraisal

Add Career Development Goal

- Scroll to the **Career Development** section.

- Enter a **Career Development Goal** in the **Career Development (Manager)** textbox.

  Note: *At least one **Career Development Goal** is required.*

- Click the **Continue** button.

Career Development

Career Development (Manager)

Complete an Intermediate Excel class by June 30,2021

Tip and Trick!

Pay attention the maximum characters limit message.

- The Career Development (Manager) textbox maximum characters limit is 150. This character limit will be used when

    1) creating the appraisal;

    2) 'mid-year' progress notes (if applicable) and;

    3) end-of-year comments.

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Phase I: Create an Appraisal

Send the appraisal to the employee

- Click the **Send to Appraisee** button.

- Enter comments to the appraisee in the **Notification Message to Appraisee** textbox (optional).

- Click the **Submit** button.

  - *The appraisal status changes to "Transfer to Appraisee"*

  - *Note: You may choose to retain possession of the appraisal until you are ready to conduct a 'mid-year' progress discussion or annual review.*

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Tip and Trick!

- *Hover you mouse over the '**Send to Appraisee**' navigation button for an explanation of its function.*

  - *The '**Send to Appraisee**' navigation button has one function. It routes an appraisal to an employee.*

- *Hover you mouse over the '**Send to Main Appraiser**' navigation button for an explanation of its function.*

  - *The '**Send to Main Appraiser**' navigation button has one function. It routes an appraisal to a supervisor.*

- *Hover you mouse over the '**Finalize and Submit to Approver**' navigation button for an explanation of its function.*

  - *The '**Finalize and Submit to Approver**' navigation button has one function. It routes an appraisal to a reviewing official.*
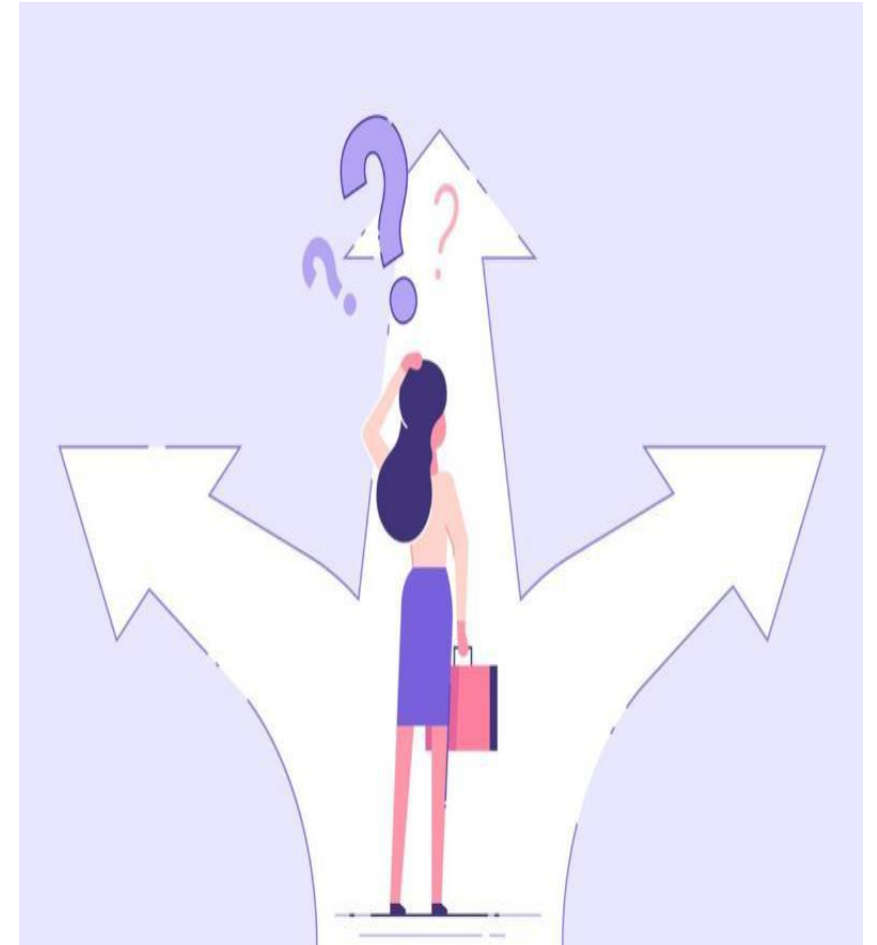
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Phase II Begins!

Phase II: 'Mid-Year' Progress Discussions

'Mid-Year' Progress Updates

- Click the most recent **"The appraisal of [Employee, One] needs your attention as main appraiser"** WPM Worklist Notification on your Oracle Application Home Page subject line.

- Click the **Update Action** link (bottom left of the appraisal).

Tip and Trick!

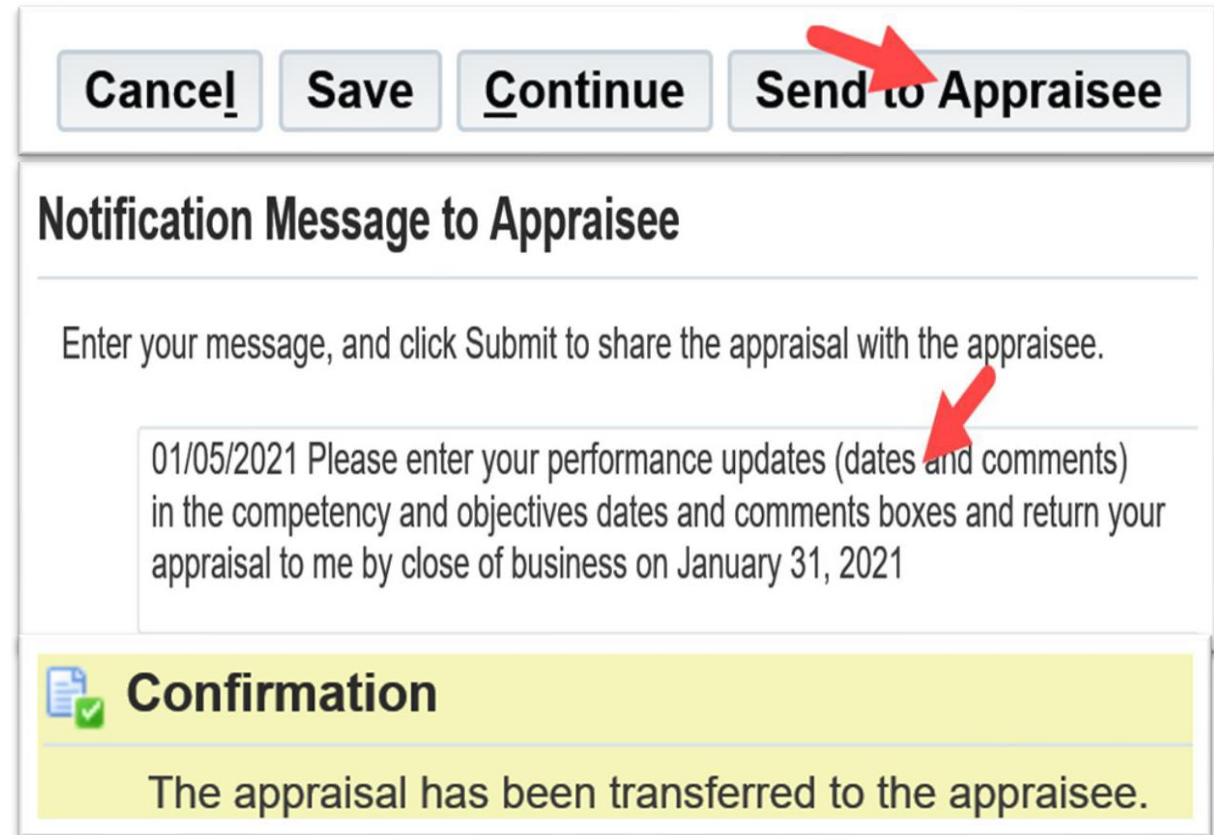## Request 'Mid-Year' Progress Updates

- *You may also navigate to your Oracle Homepage and log in to Employee Self-Services (refer to slides 5 to 9).*

- *Pay attention the maximum characters limit message.*
  - Oracle will allow users to enter more than 2000 characters but would only save a maximum of 2000 characters, including spaces.

Phase II: 'Mid-Year' Progress Discussions

Request 'Mid-Year' Progress Updates

- Click the **Send to Appraisee** button.

- Enter **Comments** in the 'Notification Message to Appraisee' textbox (optional).

- Click the **Submit** button.

- Note the **confirmation message**.

Cancel	Save	Continue	Send to Appraisee

Notification Message to Appraisee

Enter your message, and click Submit to share the appraisal with the appraisee.

01/05/2021 Please enter your performance updates (dates and comments) in the competency and objectives dates and comments boxes and return your appraisal to me by close of business on January 31, 2021

Confirmation

The appraisal has been transferred to the appraisee.

Phase II: 'Mid-Year' Progress Discussions

Enter 'Mid-Year' Progress Updates

When the appraisee returns the appraisal to you

- Click the most recent **"The appraisal of [Employee, One] needs your attention as main appraiser"** WPM Worklist Notification on your Oracle Application Home Page subject line.

- Click the **Update Action** link (*bottom left of the appraisal*).

Phase II: 'Mid-Year' Progress Discussions

Enter Competency Progress Updates

- Click the **Edit Appraisal**.

- Select the first **Update Details pencil icon**.

Phase II: 'Mid-Year' Progress Discussions

Enter Competency Progress Updates

- Enter **'Mid-Year' Date and Comments** for the first competency in the **Date and Comments** textbox.

- Pay attention to the character limits.

  Note: The same textboxes will be used for end-of-year evaluation date and comments.

- Click the **Apply and Update Next** button
  - *to enter dates and comments to all competencies on the appraisal.*

- Click the **Apply** button.

Phase II: Mid-Year' Progress Discussions

Enter Objective Progress Updates

- Scroll to the **Objectives** section of the appraisal.

- Select the first **Update Details** pencil icon.

Phase II: 'Mid-Year' Progress Discussions

Enter Objective Progress Updates

- Enter **'Mid-Year' Date and Comments** for the first objective in the **Date and Comments** textbox.

- Click the **Apply and Update Next** button
  - *to enter dates and comments to all other objectives on the appraisal*

- Click the **Apply** button.

Rate Appraisee On This Objective

Performance Rating

Date & Comments   3/10/2021 Your have missed a few deadlines during the first half of the performance review period. Please work with your colleague to ensure that you get on track. Let me know if you need additional resource or training in this area.

Maximum save limit is 2000 characters, including spaces. Text entered beyond the maximum limit will not be saved.

| Cancel | Save | Apply and Update Next | Apply |

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Phase II: 'Mid-Year' Progress Discussions

Enter Career Development Updates

- Enter **'Mid-Year' Career Development Comments** in the **Career Development (Manager)** textbox.

  Note the maximum 150 characters limit.

Career Development

Career Development (Manager)

> You are on track to accomplishing your FY21 Career Development Goal.

Maximum entry limited to 150 characters

Phase II: 'Mid-Year' Progress Discussions

Generate and Share the Appraisal

- **Generate** the appraisal using the **Report Process** *(see job aid)*.

- **Share the hard copy** of the appraisal with the appraisee.

- ***Click link below to access job aid:***

  Print an Appraisal (Using the Report Process.

MCG WPM Appraisal Details Report

Employee Details

Employee Number	0000
Employee Name	Employee, One
Department	OHR
Job	Assistant
Position	Administrative Assistant
Manager	Manager, First
Plan Name	FY21 MCG Executive Branch Performance Plan
Plan Start Date	01-Jul-2020
Plan End Date	30-Jun-2021
Status	Ongoing with Main Appraiser
Main Appraiser	Manager, First
Template	GSS Performance Plan
Appraisal Type	Annual Performance Appraisal
Overall Rating	
Appraisee Overall Comments	
Appraiser Overall Comments	

Phase III Begins!

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Phase III: Evaluate Appraisee's Performance

Locate the Appraisal

- Click the most recent **"The appraisal of [Employee, One] needs your attention as main appraiser"** WPM Worklist Notification on your Oracle Application Home Page subject line.

- Click the **Update Action** link (bottom left of the appraisal).

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Tip and Trick!

Locate the Appraisal and Rating Competency Information

- *You may also navigate to your Oracle Homepage and log in to Employee Self-Services (refer to slides 5 to 9).*

- *Pay attention the maximum characters limit message.*
  - Oracle will allow users to enter more than 2000 characters but would only save a maximum of 2000 characters, including spaces.

- *For your convenience, the following information is built into the appraisal:*
  1. The Competency Name and Description display in the Update Competency Evaluation section.
  2. The Performance Rating Scale, which include Rating Levels and Behavioral Indicators, display in the Rate Appraisee on This Competency section.

Phase III: Evaluate Appraisee's Performance

Rate Appraisee's Performance

- Click the **Edit Appraisal** button on the **Details: Main Appraiser** page.

- Click the next **Edit Appraisal** button on the **Main Appraiser Review** page.

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Phase III: Evaluate Appraisee's Performance

Rate Appraisee's Performance

- Click the **Update Details** pencil icon for the first competency.

- Click the **Performance Rating drop-down** button and select a rating.

- Enter the **Date and Comments** that support the rating assigned, in the **Date and Comments** section.

- Click the **Apply and Update Next** button until all competency ratings, dates and comments are entered.

- Click the **Apply** button.

Phase III: Evaluate Appraisee's Performance

Assign Objective Ratings

- Scroll down to the **Objectives** section.

- Click the **Update Details** pencil icon for the first objective.

- Click the **Performance Rating drop-down** button and select a rating.

- Enter the **Date and Comments** that support the rating assigned, in the **Date and Comments** section.

- Click the **Apply and Update Next** button until all objective ratings and comments are entered.

- Click the **Apply** button.

Tip and Trick!

- *Pay attention the maximum characters limit message.*

  - *Oracle will allow users to enter more than 2000 characters but would only save a maximum of 2000 characters, including spaces.*

- *For your convenience, the following information is built into the appraisal:*

  1. The Objective Name and Dates display in the Update Objective Details section.
  2. The Objective Detail and Success Criteria display in the Description section.
  3. The Performance Rating Scale which include Rating Levels and Behavioral Indicators display in the Rate Appraisee on This Objective section.

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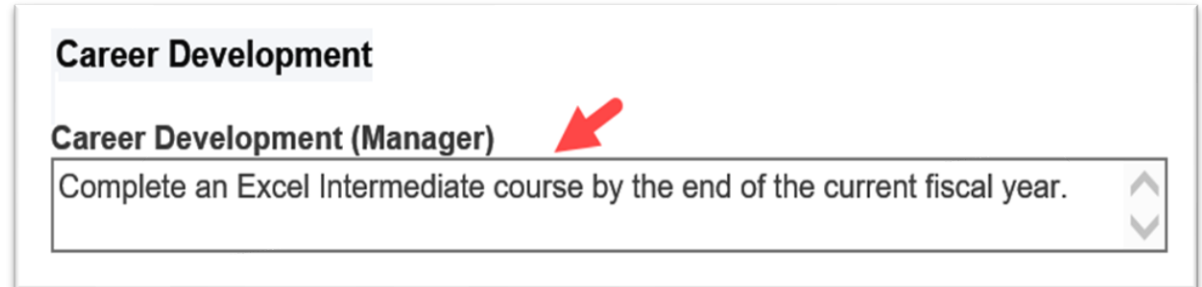
Phase III: Evaluate Appraisee's Performance

Enter Career Development Comments

- Scroll down to the **Career Development (Manager)** section.

- Enter **Comments** in the **Career Development (Manager)** textbox.

Note: Career Development goals are not rated.

Career development encourages employees to continue to grow in their current positions or to plan their own career path/promotional objectives.

Career Development

Career Development (Manager)

Complete an Excel Intermediate course by the end of the current fiscal year.

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Tip and Trick!

- *Pay attention the maximum characters limit message.*
  - *The Career Development (Manager) textbox maximum characters limit is 150.*

Tip and Trick!

Enter Overall Ratings and Comments

CAUTION!

==*DO NOT*== enter overall ratings or comments until you are ready for the appraisee to see the overall rating and comments.

- Instead, *generate/print a copy of the evaluation*;

- **Manually enter** the overall rating and comments.

- Share and discuss the copy with the Approver (Reviewing Official).

- When consensus is reached (edit the evaluation, is needed); and/or **enter the overall rating and comments**.

Phase III: Evaluate Appraisee's Performance

Enter Overall Ratings and Comments

- *When ready to enter overall ratings and comments*:

    - Scroll down to the **Overall Ratings and Comments** section.

    - Click the **Overall Rating drop-down** button and select a rating.

    - **Enter Date and supporting Comments** in the **Date and Comments** textbox.

    - Click the **Send to Appraisee** button.

        Note: Appraisees (employees) must be given the opportunity to enter Overall Ratings comments (optional).

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Tip and Trick!

To avoid being caught in a 'sending loop'…

- *Hover you mouse over the '**Finalize and Submit to Approver**' navigation button for an explanation of its function.*

- *The '**Finalize and Submit to Approver'** navigation button has one function. It routes an appraisal to an Approver (reviewing Official).*

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Phase III: Evaluate Appraisee's Performance

Submit Performance Evaluation for Approval

When the employee returns the appraisal to you

- Click the **Finalize and Submit to Approver** button.

- Click the **Continue** button.

- Click the **Submit** button.

- Note the **Warning message**.

- Click Yes.

- Note the Confirmation message.

- Click **Ok**.

  Note: The appraisal has been transferred electronically to the Approver for his/her approval.

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Performance Management Resources

- Click **Performance Management Resources** for
    - Performance Management Timelines
    - Evaluation Forms (Represented employees)
    - Policies and Procedures
    - Other resources Materials
        - Oracle WPM Job Aids are located in the Other Resources Material section
        - Click on the applicable section below based on your role.