

Workforce Performance Management (WPM)

Functional Oracle Training

for Supervisors



TRAINING



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](#)

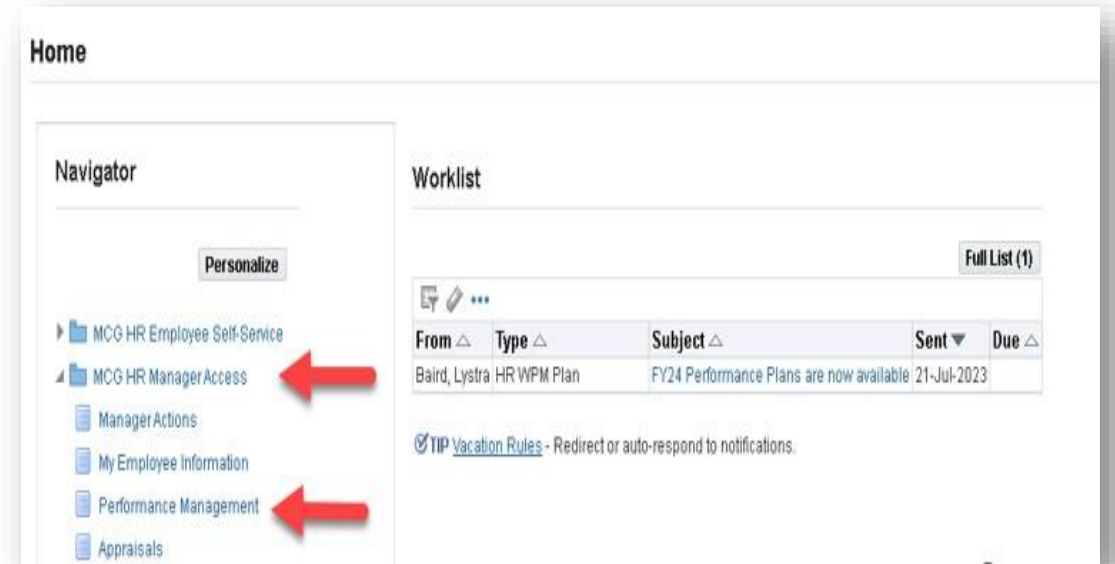
accessMCG application portal



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.



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.

The screenshot shows the 'Performance Management Appraisals' page. It includes a header with 'Performance Management' and 'Appraisals' tabs. Below the header is a message: 'On this page, you can access worker development functions and view performance management notification messages.' A red tip states: 'Please note the following terminology used for appraisals: Appraiser = Supervisor, Appraisee = Employee, Approver = Reviewing Official.' The main section is titled 'Performance Management Task List' and contains a table with columns 'Focus Task' and 'Go to Task'. The table lists tasks under 'My Plans', including 'FY23 MCG Executive Branch Performance Plan' and 'FY24 MCG Executive Branch Performance Plan'. Each task has a 'Go to Task' icon (a blue document with a green arrow) in the right column. A red arrow points to the 'Go to Task' icon for the 'FY24 MCG Executive Branch Performance Plan - RUP 17' task.





Focus Task	Go to Task
My Plans	
FY23 MCG Executive Branch Performance Plan	
Manage appraisals: PSM Performance Plan	
Manage appraisals: GSS Performance Plan	
Manage appraisals: MLS Performance Plan	
FY24 MCG Executive Branch Performance Plan	
Manage appraisals: PSM Performance Plan	
Manage appraisals: GSS Performance Plan	
Manage appraisals: MLS Performance Plan	
FY24 MCG Executive Branch Performance Plan - RUP 17	
Manage appraisals: PSM Performance Plan	
Manage appraisals: GSS Performance Plan	
Manage appraisals: MLS Performance Plan	



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*.

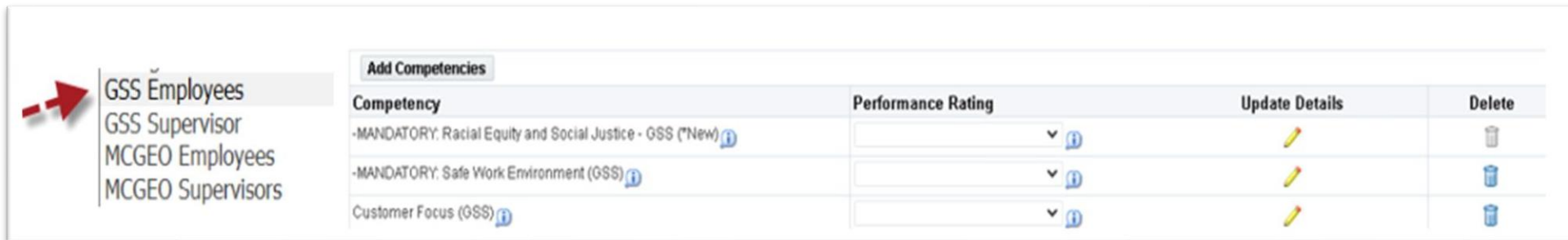
Appraisals In Progress			
<input type="checkbox"/>	Appraisee	Status 	Appraise 
<input type="checkbox"/>	Employee, One	Planned 	



Tip and Trick!

Number of Competencies to apply to an appraisal...

- OHR recommends no more than four (4) or five (5) Competencies, in addition to the mandatory competencies.
- **Choose carefully!** Competencies cannot be deleted once the appraisal is shared with the employee.



Competency	Performance Rating	Update Details	Delete
-MANDATORY: Racial Equity and Social Justice - GSS (*New) ⓘ	▼ ⓘ	✎	🗑️
-MANDATORY: Safe Work Environment (GSS) ⓘ	▼ ⓘ	✎	🗑️
Customer Focus (GSS) ⓘ	▼ ⓘ	✎	🗑️



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 Type populates on the Search page.*

- Click **Go**.

Competencies

Add Competencies

Competency

No results found.

Search

Competency Type

Go **Clear**



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.

Search

Competency Type: GSS Employees

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	-MANDATORY: Safe Work Environment (GSS)
<input type="checkbox"/>	Appreciating Diversity (GSS)
<input type="checkbox"/>	Change Management (GSS)
<input type="checkbox"/>	Communication (GSS)
<input checked="" type="checkbox"/>	Customer Focus (GSS)
<input checked="" type="checkbox"/>	Expertise and Knowledge (GSS)



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.

Objectives

Create New Objectives **Copy Past Objectives**

Add Objective

* Indicates required field

* Objective Name **Created By** Manager, First

* Start Date

End Date

Priority

Description

Detail

Success Criteria

Cancel **Save** **Apply and Create Another** **Apply**



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 pres. At least one fielded in tharch (underscore (_)).

Search

Note that the search is case insensitive

Objective Name	<input type="text"/>	Start Date	<input type="text"/>
Assignment	<input type="text"/>	End Date	<input type="text"/>
Plan Name	<input type="text"/>	Priority	<input type="text"/>
Created By	<input type="text"/>		

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**.



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.




Search and Select: Plan Name

Search

To find your item, select a filter item in the pulldown list and enter a select the "Go.

Search By

Results

	Quick Select	Plan Name	Start Date	End Date
<input type="radio"/>		FY20 MCG Executive Branch Performance Plan	01-Jul-2019	31-Dec-2020
<input type="radio"/>		FY20 MCG Legislative Branch Performance Plan	01-Jul-2019	31-Dec-2020
<input type="radio"/>		FY20 MCG Sheriff Office Performance Plan	01-Jul-2019	31-Dec-2020



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 pres. At least one field used in thrct underscore (_).

Search

Note that the search is case insensitive

Objective Name	<input type="text"/>	Start Date	<input type="text"/>
Assignment	<input type="text"/>	End Date	<input type="text"/>
Plan Name	<input type="text" value="FY20 MCG Executive Br:"/>	Priority	<input type="text"/>
Created By	<input type="text"/>		

Go **Clear**



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.

<input checked="" type="checkbox"/>	Details	Objective Name	Plan Name
<input checked="" type="checkbox"/>	▶	HR Generalist Team Member	FY20 MCG Executive Branch Performance Plan
<input checked="" type="checkbox"/>	▶	HR Systems and Reporting	FY20 MCG Executive Branch Performance Plan
<input checked="" type="checkbox"/>	▶	Recruiting and Staffing Support	FY20 MCG Executive Branch Performance Plan
<input checked="" type="checkbox"/>	▶	Provide HR Program and Policy Guidance	FY20 MCG Executive Branch Performance Plan

Cancel **Apply** ←



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 update 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.

Objectives

Create New Objectives Copy Past Objectives

Objective Name	Start Date	End Date	Update Details
HR Generalist Team Member	01-Jul-2020	31-Dec-2021	
HR Systems and Reporting	01-Jul-2020	31-Dec-2021	
Provide HR Program and Policy Guidance	01-Jul-2020	31-Dec-2021	
Recruiting and Staffing Support	01-Jul-2020	31-Dec-2021	

Update Objective

Cancel Save Apply and Update Next Apply

* Indicates required field

* Objective Name HR Generalist Team Member
Created By Manager, First

* Start Date 01-Jul-2020
End Date 31-Dec-2021
Priority

Description

Detail Works collaborative customer service needs are met. Participates with

Success Criteria This rating category is not expected; achieved a majority of results as expected



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.



The screenshot shows a web interface with a dropdown menu. The menu is open, showing the selected option: "Complete an Intermediate Excel class by June 30, 2021". A red arrow points to the dropdown arrow on the right side of the menu. The text "Career Development (Manager)" is visible above the dropdown, and "Career Development" is visible above that.



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.



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.

Cancel Save Continue **Send to Appraisee**

Notification Message to Appraisee

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

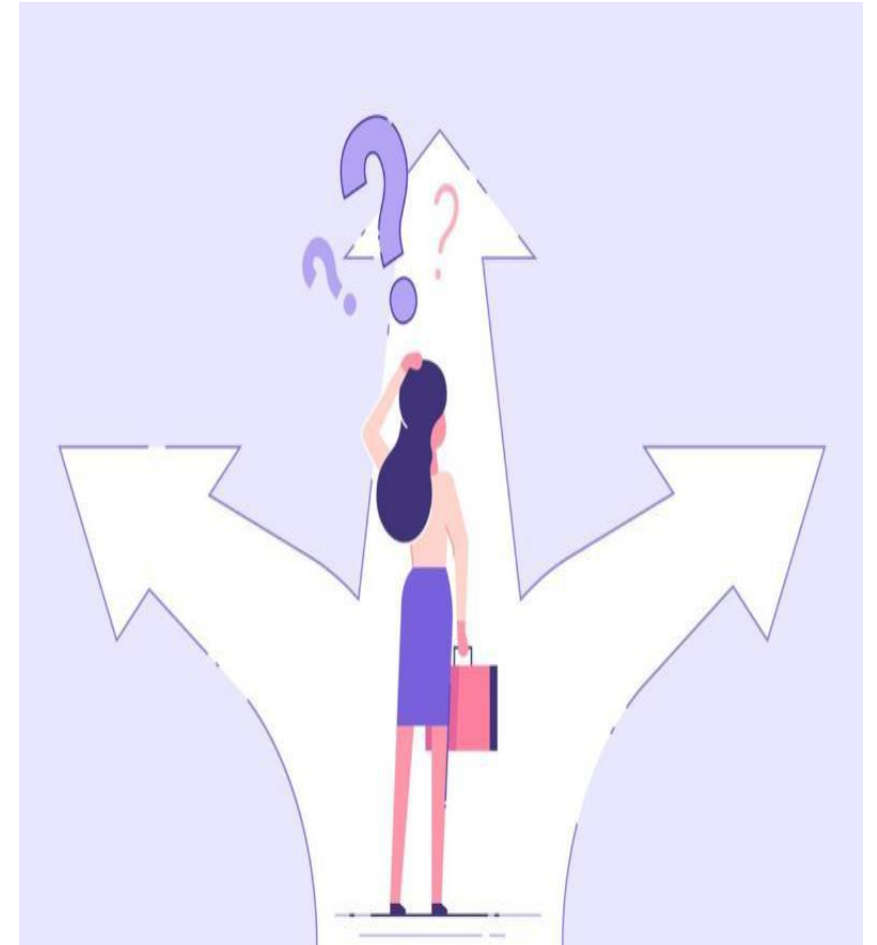
Please review and provide any input. Return your appraisal to me by close of business on Friday, April 2, 2021

Cancel Submit



Tip and Trick!

- Hover your mouse over the '**Send to Appraiser**' navigation button for an explanation of its function.
 - The '**Send to Appraiser**' navigation button has one function. It routes an appraisal to an employee.
- Hover your 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 your 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.



Phase II Begins!



Office of *Human* Resources

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).

The screenshot shows two sections from an Oracle application interface. The top section is titled "Worklist" and contains a table with two columns: "Type" and "Subject". The "Type" column has the value "HR" and the "Subject" column has the text "The appraisal of Employee, One needs your attention as Main Appraiser". A red arrow points to the subject text. Below the "Worklist" section is the "Related Applications" section, which contains a link labeled "Update Action" with a document icon to its left. A red arrow points to the "Update Action" link. To the right of the "Update Action" link is a yellow cloud-shaped callout box containing the text "Bottom left of the page".

Type	Subject
HR	The appraisal of Employee, One needs your attention as Main Appraiser

Update Action

Bottom left of the page



Tip and Trick!

Request 'Mid-Year' Progress Updates

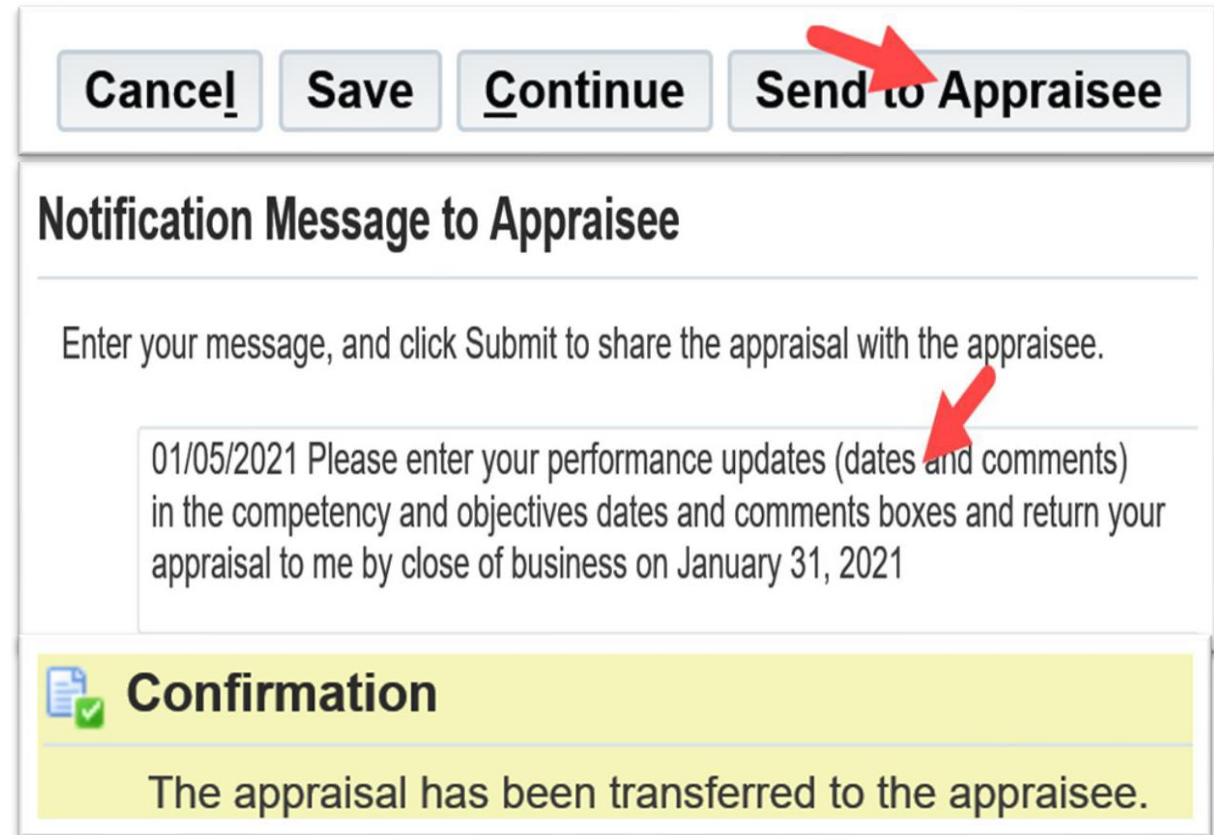
- You may also navigate to your Oracle Homepage and log in to Employee Self-Services (*refer to slides 5 to 9*).
- Pay attention the maximum characters limit message.
 - Oracle will allow users to enter more than 2000 characters but would only save a maximum of 2000 characters, including spaces.



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).

Worklist

...

Type <input type="checkbox"/>	Subject <input type="checkbox"/>
HR	The appraisal of Employee, One needs your attention as Main Appraiser

Related Applications

 [Update Action](#)







Bottom left of the page



Phase II: 'Mid-Year' Progress Discussions

Enter Competency Progress Updates

- Click the [Edit Appraisal](#).
- Select the first [Update Details](#) pencil icon.

Send to Appraisee Edit Appraisal Finalize and Submit to Approver		
Competencies		
Add Competencies		
Details	Competency	Update Details
▶	-MANDATORY: Safe Work Environment (GSS) 	
▶	Customer Focus (GSS) 	
▶	Expertise and Knowledge (GSS) 	



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.

Rate Appraisee On This Competency

Performance Rating

Date & Comments





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



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.

Objectives		
Create New Objectives Copy Past Objectives		
Details	Objective Name	Update Comments
▶	HR Generalist Team Member	
▶	HR Systems and Reporting	
▶	Provide HR Program and Policy Guidance	
▶	Recruiting and Staffing Support	



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

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



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.](#)

<u>MCG WPM Appraisal Details Report</u>	
<u>Employee Details</u>	
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!



Office of *Human* Resources

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).

Worklist

Type \triangle	Subject \triangle
HR	The appraisal of Employee, One needs your attention as Main Appraiser

Related Applications

 [Update Action](#)

Bottom left of the page



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.



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.

The screenshot displays a web interface for evaluating an appraisee's performance. It is divided into two main sections: 'Competencies' and 'Rate Appraisee On This Competency'.

Competencies Section: This section contains an 'Add Competencies' button and a table with two columns: 'Competency' and 'Performance Rating'. The first row lists '-MANDATORY: Safe Work Environment' with a performance rating dropdown set to '4-Highly Successful'. The second row lists 'Change Management' with a performance rating dropdown set to '4-Highly Successful'. To the right of the table is an 'Update Details' column with pencil icons for each row, indicating where to click to edit details.

Rate Appraisee On This Competency Section: This section is for providing details for a specific competency. It features a 'Performance Rating' dropdown menu currently set to '4-Highly Successful' and a 'Date & Comments' text area. The date '06/05/2020' and the comment 'Here is the narrative that supports this Highly successful rating.' are entered in the text area. A note below the text area states: 'Maximum save limit is 2000 characters, including spaces. Text entered beyond the maximum limit will not be saved.'

Action Buttons: At the bottom of the interface are four buttons: 'Cancel', 'Save', 'Apply and Update Next', and 'Apply'. Red arrows point to the 'Update Details' pencil icon in the first row of the 'Competencies' table, the 'Performance Rating' dropdown, the 'Date & Comments' text area, the 'Apply and Update Next' button, and 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.

The screenshot displays a web interface for managing performance objectives. At the top, there are two buttons: "Create New Objectives" and "Copy Past Objectives". Below these is a table with the following columns: "Objective Name", "Start Date", "End Date", "Performance Rating", and "Update Details". The first row in the table shows "Financial Disclosure" as the objective name, with a start date of "01-Jul-2020" and an end date of "30-Jun-2021". The "Performance Rating" column contains a dropdown menu with a downward arrow and an information icon. A red arrow points to the "Update Details" column, which contains a pencil icon. Below the table is a section titled "Rate Appraisee On This Objective". It features a "Performance Rating" dropdown menu set to "4-Highly Successful" with a red arrow pointing to it. Below the rating is a "Date & Comments" text area containing the text "06/05/2020 Here is the narrative that supports this Highly Successful rating." with a red arrow pointing to it. A note below the text area states: "Maximum save limit is 2000 characters, including spaces. Text entered beyond the maximum limit will not be saved." At the bottom of the interface are four buttons: "Cancel", "Save", "Apply and Update Next", and "Apply". Red arrows point to the "Apply and Update Next" and "Apply" buttons.

Objective Name	Start Date	End Date	Performance Rating	Update Details
Financial Disclosure	01-Jul-2020	30-Jun-2021	<input type="text"/>	

Rate Appraisee On This Objective

Performance Rating: 4-Highly Successful

Date & Comments: 06/05/2020 Here is the narrative that supports this Highly Successful rating.

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

Buttons: Cancel, Save, Apply and Update Next, Apply



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.



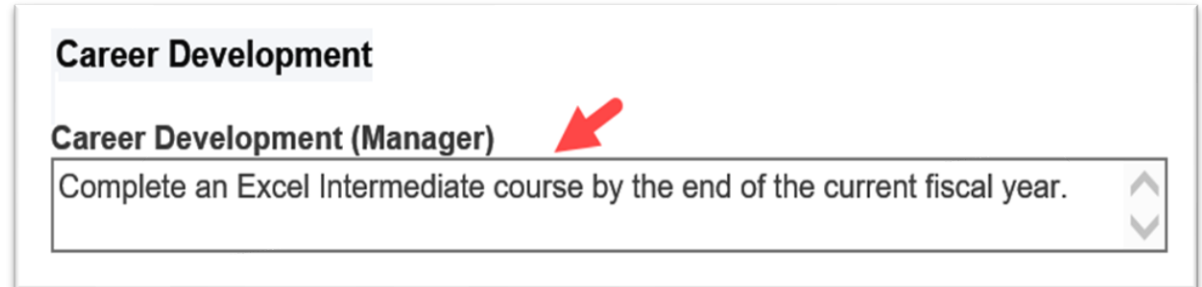
Phase III: Evaluate Appraisee's Performance

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.



The screenshot shows a web form with a dropdown menu. The dropdown is currently set to "Career Development (Manager)", which is highlighted by a red arrow. Below the dropdown, there is a text input field containing the text "Complete an Excel Intermediate course by the end of the current fiscal year." The dropdown menu has up and down arrow icons on the right side.



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).

Overall Rating and Comments

Overall Rating 4-Highly Successful

Date & Comments 06/05/2020 Here is the narrative that supports this Highly Successful rating.

Cancel Save Continue Send to Appraisee



Tip and Trick!

To avoid being caught in a 'sending loop'...

- Hover your 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).



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.*

Send to Appraisee Edit Appraisal **Finalize and Submit to Approver**

Cancel Save **Continue**

Cancel Printable Page Back **Submit**

Warning

You have chosen to submit this appraisal for final approval.

Once submitted, you will not be able to edit it unless your Approver returns the appraisal to you. Following approval, the system will notify you and route a copy to the employee to review and finalize.

No **Yes**

Confirmation

You have submitted the appraisal for approval.



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.

