

*Performance
Management
On-Line
Supervisor's Guide*

Table of Contents

<i>Using This Document</i>	4
<i>Performance Appraisal Process Flow Diagram</i>	5
<i>Employee: Completes Self-Appraisal</i>	6
<i>Navigate to the Self-Appraisal</i>	6
<i>Add an Objective and an Objective Results Rating</i>	9
<i>Update and Rate an Objective Already on the Self-Appraisal Form</i>	13
<i>Complete the Self-Appraisal Questionnaire</i>	18
<i>Employee (Appraisee): Shares Self-Appraisal with Supervisor (Main Appraiser)</i>	21
<i>The employee’s supervisor receives email and workflow notifications saying that the employee has transferred ownership. Supervisor (Main Appraiser): Reviews the Self-Appraisal</i>	23
<i>Supervisor (Main Appraiser): Questions on Self-Appraisal? - Yes</i>	30
<i>Share Ownership Back to Employee for Additional Work</i>	30
<i>Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes</i>	33
<i>Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes</i>	39
<i>Supervisor (Main Appraiser): Appraises Performance</i>	45
<i>Appraise Performance</i>	45
<i>Rate Objective Results</i>	51
<i>Summarize Participant Input and Give Final Rating</i>	54
<i>Supervisor (Main Appraiser): Meets with Appraisee to Review Appraisal</i>	56
<i>Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee</i>	57
<i>Employee: Completes Self Appraisal</i>	61
<i>Employee (Appraisee): Provides Feedback to Appraiser</i>	64
<i>Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval</i>	67
<i>Supervisor’s Supervisor (Approver): Approves Appraisal</i>	73
<i>Supervisor (Main Appraiser): Views Approved Performance Appraisals</i>	76
<i>Objective Setting Process Flow Diagram</i>	79
<i>Objective Setting - General</i>	80
<i>Employee: (Objectives) Entered by Employee - Yes</i>	82
<i>Navigate to the Objectives Form</i>	82
<i>Employee: Adds Objectives for the Fiscal Year</i>	84
<i>Employee: Shares Objectives Form with Supervisor</i>	88
<i>Supervisor: Adds/Reviews/Edits Objectives</i>	91
<i>Review Objectives Entered by the Employee</i>	91
<i>Edit Objectives Entered by the Employee</i>	96
<i>Add Objectives</i>	98
<i>Supervisor: Additional Work by Employee? – Yes</i>	101

<i>Share Objectives Form with Employee</i>	<i>101</i>
<i>Supervisor: Approves Objectives and Transfers Objectives Form Back to Employee</i>	<i>104</i>
<i>Employee: Updates Progress</i>	<i>106</i>
<i>Printing</i>	<i>107</i>
<i>Printing Using the Printable Page Button</i>	<i>107</i>
<i>Printing an in-progress performance appraisal or the Objectives form</i>	<i>107</i>
<i>Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved.....</i>	<i>109</i>
<i>Printing a Completed Performance Appraisal Using the Print Icon After the Appraisal is Approved.....</i>	<i>114</i>
<i>Supervisor: Viewing Performance Appraisal Progress.....</i>	<i>116</i>
<i>Appraisal Summary Report.....</i>	<i>116</i>
<i>View by Reporting Hierarchy</i>	<i>120</i>
<i>Access Completed and In-Progress Appraisals by Reporting Hierarchy.....</i>	<i>120</i>
<i>Supervisor: Changing Main Appraiser.....</i>	<i>122</i>
<i>Change Main Appraiser.....</i>	<i>122</i>
<i>Review Main Appraiser Change Notification.....</i>	<i>125</i>
<i>Participating as an Additional Appraiser</i>	<i>128</i>
<i>Participating as an Additional Reviewer.....</i>	<i>135</i>

Using This Document

General

This document provides instructions about how to access and use the on-line Performance Management tool. It is not intended to provide instructions or information about how to evaluate a person's performance or on set objectives. For more information about appraising a person's performance or setting objectives please consult the Performance Management webpage at:

<http://www.hr.pitt.edu/managers/0040>

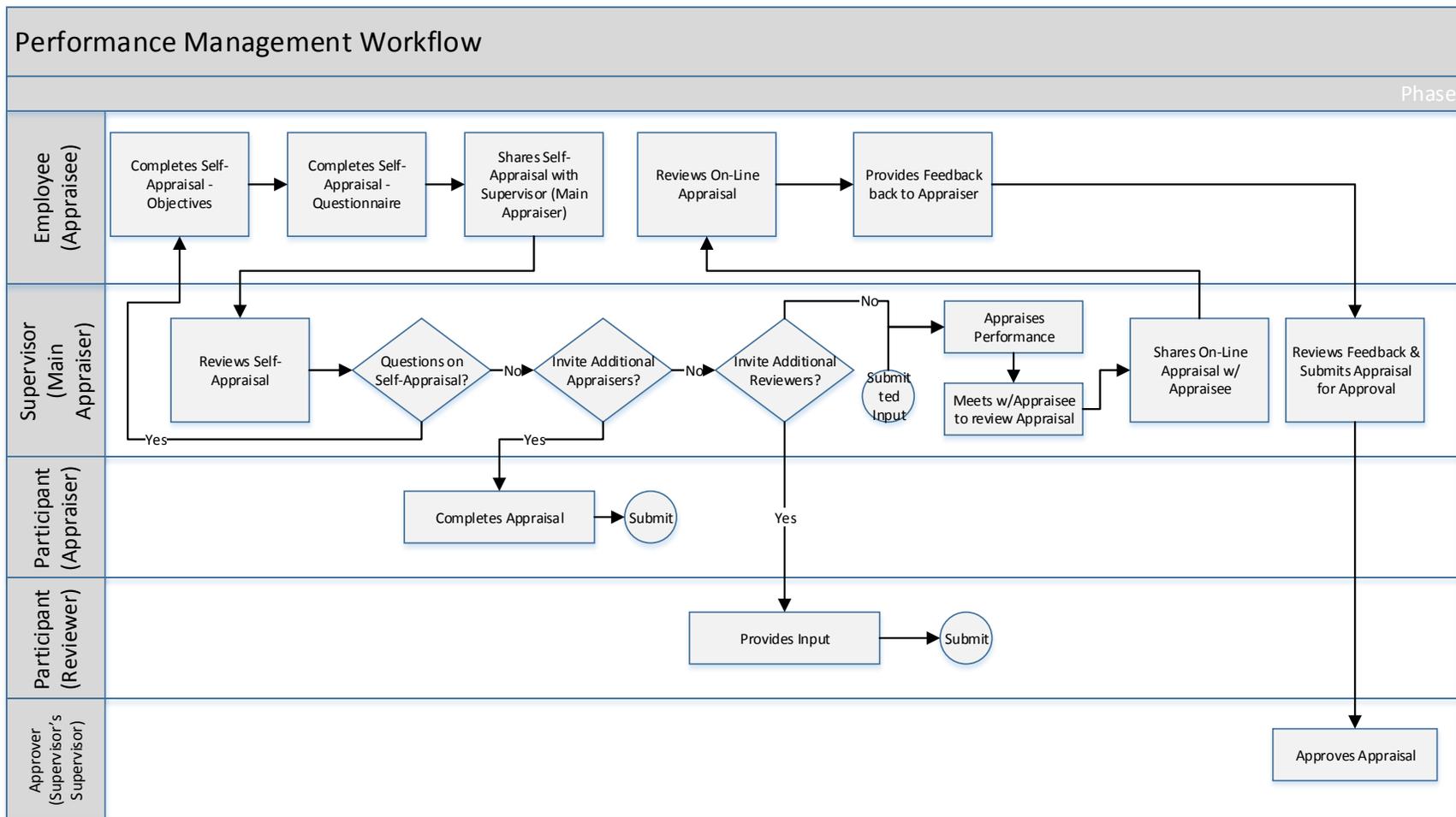
Organization

The first part of this document is arranged to follow along with a process flow diagram that outlines the main steps of the performance appraisal process.

The second part of this document follows a process flow diagram that outlines the steps of objective setting.

Finally, the last part of this document focuses on specific features of the on-line tool that are not included in the process flows and on reporting.

Performance Appraisal Process Flow Diagram



Employee: Completes Self-Appraisal

Navigate to the Self-Appraisal

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal

The Performance Management on-line tools are in PRISM. To access them, the employee logs in to PRISM just as they would to access the PRISMTRKS timecard or to make an address change. Login questions should be directed to Human Resources at 412-624-8044.

The Employee:

1. Logs in to PRISM.
2. Selects the *PHR Performance Management – Employee* responsibility.
3. Selects the *Performance Management* menu item to access the *Employee Dashboard*.

The screenshot shows the Oracle E-Business Suite interface. At the top, there is a navigation bar with 'Oracle Applications Home Page', 'Enterprise Search', and 'Logged In As EMPLOYEE1'. The 'Main Menu' on the left includes 'PHR Employee Self-Service', 'PHR Performance Management - Employee', and 'PRISM TRKS Time'. Under 'PHR Performance Management - Employee', 'Performance Management' is highlighted. The 'Worklist' on the right shows a table with columns 'From', 'Type', 'Subject', 'Sent', and 'Due'. A message states: 'PRISM TRKS USERS: Approved timecards are due before noon on Monday.'

4. On the *Employee Dashboard* finds the *Task* for the current year (the name changes each year).

The screenshot shows the Oracle PHR Performance Management - Employee dashboard. The 'Performance Management' tab is active. A 'Performance Management Task List' is displayed with columns: Focus Task, Process, Start Date, End Date, and Go to Task. A task is highlighted with a purple circle: 'Fiscal 2016 Non-Supervisory Manage appraisal: Appraisal-Non-Supervisory Role v3'. Below the task list is a 'Notifications Awaiting Your Attention' section with columns: Subject, Sent, Name, Department, Job, Effective Date, Update, and Delete. A 'Help' sidebar on the right provides links to 'Plan' and 'Click to Access Help Documents'.

Employee (Appraisee): Completes Self Appraisal

Navigate to the Self-Appraisal

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal (required)
Task	Navigate to the Self-Appraisal

5. Clicks the *Go To Task* icon.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Logged In As Employee1, Chris

On this page, you can access your development functions and view Performance management notification messages.

Performance Management Task List

Expand All Collapse All

Focus Task	Process	Start Date	End Date	Go to Task
Fiscal 2016 Non-Supervisory Manage appraisal: Appraisal-Non-Supervisory Role v3	Appraisal	21-Mar-2016	16-Apr-2016	

Notifications Awaiting Your Attention

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
No results found.							

Help

Plan	Click to Access Help Documents
Fiscal 2016 Non-Supervisory	

Click [here](#) to access the Performance Management website.

6. The *Appraisal Summary* page will open.

7. Clicks the *Update Self-Appraisal* icon.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

My Appraisals Participant

Selected Plan Is Fiscal 2016 Non-Supervisor

My Appraisals

Appraisals of Employee1, Chris

Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View Appraisal Details/Give Feedback	Update Print Self-Appraisal
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Planned		

Completed Appraisals

Note that the search is case insensitive

Initiator

Last Name, Title, First Name

Appraisal Date

(example: 21-Mar-2016)

Go Clear

Initiator	Appraisal Date	Period Start Date	Period End Date	Appraisal Purpose	Details	Print	Plan
No results found.							

Employee (Appraisee): Completes Self-Appraisal

Objectives - General

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal
Task	Objectives – General

The Performance Management on-line tool can be used during the performance year to set and track objectives. At the end of the performance year the objectives results can be rated by the employee (appraisee) and/or by the supervisor (main appraiser).

If objectives were not entered into the on-line tool at the beginning or during the performance year, they can be entered at the end as part of the performance appraisal process.

Objectives can be entered by the employee or by the supervisor. Supervisors can always edit/update the objectives entered by employees. However, only supervisors can edit/update the objectives that they entered.

The on-line tool does not require that objectives be entered/rated. Supervisors can decide whether or not utilize the objectives feature. They can also control who enters the objectives into the on-line tool; themselves or their employees. Once supervisors decide if/how they will utilize the tool, they should provide instructions to their employees.

If the objectives feature will not be used, please skip to the next Flow Block 'Completes Self-Appraisal – Questionnaire'.

Employee (Appraisee): Completes Self-Appraisal

Add an Objective and an Objective Results Rating

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Add and Rate Objectives (optional)

If objectives were not entered into the on-line tool at the beginning of or during the performance appraisal year then the objective section of the main appraisals page will be empty. This topic provides instructions for entering objectives to be included in the appraisal process. If the objectives already exist on the self-appraisal then skip to the next section.

The Employee:

NOTE: Adding objectives into the on-line tool is optional. However, to add an objective, certain fields are required. Please see the notation after each step. In the on-line tool required fields are marked by an asterisk (*).

1. Clicks the *Add Objective* button. (required)

The screenshot shows the Oracle PHR Performance Management - Employee interface. The page title is "ORACLE PHR Performance Management - Employee". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". The main content area is titled "Update Standard Appraisal: Overview" and has a progress indicator with "Overview" and "Review" steps. Below the progress indicator are buttons for "Cancel", "Save as Draft", "Share with Supervisor", and "Continue". The employee information is displayed as follows:

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Below the employee information, there are two paragraphs of text explaining the self-appraisal process. The first paragraph states: "The Self-Appraisal provides you with the opportunity to contribute significantly to improving both your own performance and your working relationship with your supervisor. The University's Performance Appraisal Program is designed to provide time for the employee and supervisor to look back over the past and realistically plan for the future." The second paragraph states: "The Self-Appraisal encourages you to be proud of your accomplishments and be candid about your areas of improvement. The questions, found in the Questionnaire section below, are intended to help you organize your thoughts and share information with your supervisor prior to receiving your performance appraisal. An essential goal of the performance appraisal meeting is that both you and your supervisor know clearly what you expect of each other and feel strongly that you can achieve your objectives by working together. Please respond to the questions completely and accurately."

The "Objectives" section is highlighted in blue. It contains a table with the following columns: "Objective Name", "Start Date", "Target Date", "Date Completed", "Employee Results Rating", "Duplicate", "Update Details", and "Quick Update". The "Add Objective" button is circled in red. Below the table, it says "No results found." The "Questionnaire" section is also highlighted in blue. It contains a "Complete Questionnaire" button. The questionnaire name is "Self-Appraisal v2" and the last submitted on date is not specified.

2. In the *Objective Name* field, enters a descriptive name for the Objective. (required)

Employee (Appraisee): Completes Self-Appraisal

Add an Objective and an Objective Results Rating

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Add and Rate Objectives (optional)

3. In the *Start Date* field, enters the date on which the objective is scheduled to start or the actual date if the work has already started. (required)
4. In the *Target Date* field, enters the date by which the objective should be completed. (optional)
5. If this objective should be reviewed periodically, enters the next review date in the *Next Review Date* field. (optional) It is not necessary to enter a date for the annual performance appraisal review.
6. Selects the appropriate level from the drop down in the *Priority* field. (optional)
7. Enters an appropriate percent in the *Complete %* field. If work on the objective has not started enters 0% or leaves the field blank. (optional)
8. More detailed information about the objective can be entered into the *Detail* box. (optional)
9. Text detailing the criteria to measure the success of the objective can be entered into the *Success Criteria* box. (optional)
10. Comments about the objective can be entered into the *Comments* box. (optional)

ORACLE PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Add Objective

* Indicates required field

Cancel Save as Draft Apply and Add Another Apply

* Objective Name Objective 1 Complete (%) 100 ⓘ
 Created By Employee1, Chris Date Completed 20-Mar-2016 ⓘ
 * Start Date 15-Sep-2015 ⓘ
 Target Date 15-Mar-2016 ⓘ
 Next Review Date ⓘ
 * Priority High ▾

Description

Detail	Objective 1 is to modify the existing tasks and forms to provide a more efficient flow and faster completion of this work.
Success Criteria	Realize a 10% improvement in effort and improved performance.
Comments	Work was actually completed on 12-MAR-16 but was not able to obtain sign-off until the 20th.

Employee (Appraisee): Completes Self-Appraisal

Add an Objective and an Objective Results Rating

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Add and Rate Objectives (optional)

11. To add an objective results rating, selects the appropriate value from the drop-down box in the *Results Rating* field. (optional)
12. Enters comments supporting the rating in the *Comments* box. (required if an Objective Results Rating is entered, otherwise, optional)

Rate Yourself on this Objective

Results Rating: [Hide](#)

Comments:

Results Rating Scale

Step Value	Rating Scale	Behavioral Indicator
1	Did Not Achieve Result	
2	Achieved Result	
3	Achieved More Than Expected Result	

Employee (Appraisee): Completes Self-Appraisal

Add an Objective and an Objective Results Rating

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Add and Rate Objectives (optional)

13. Clicks the *Apply* button to add the objective to the appraisal and return to the main self-appraisal page. Alternatively, clicks the *Apply and Add Another* button to commit objective and add another one or clicks the *Save as Draft* button to finish the work later (one of these is required or the data entered will be lost).

ORACLE PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Update Standard Appraisal: Overview

Cancel Save as Draft Share with Supervisor Continue

Employee Name **Employee1, Chris** Employee Number **166670**
 Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

The Self-Appraisal provides you with the opportunity to contribute significantly to improving both your own performance and your working relationship with your supervisor. The University's Performance Appraisal Program is designed to provide time for the employee and supervisor to look back over the past and realistically plan for the future.

The Self-Appraisal encourages you to be proud of your accomplishments and be candid about your areas of improvement. The questions, found in the Questionnaire section below, are intended to help you organize your thoughts and share information with your supervisor prior to receiving your performance appraisal. An essential goal of the performance appraisal meeting is that both you and your supervisor know clearly what you expect of each other and feel strongly that you can achieve your objectives by working together. Please respond to the questions completely and accurately.

Objectives

Add Objective

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective 1	15-Sep-2015	15-Mar-2016	20-Mar-2016	3-Achieved More Than Expected Result			

Questionnaire

Questionnaire Name **Self-Appraisal v2** Last Submitted On

Complete Questionnaire

14. To modify the objective from the main appraisal page, clicks the *Update Details* icon.
15. Employees can only edit objectives that they entered. If the objective was entered by their supervisor, they can use the *Quick Update* icon to send information about the objective to their supervisor who will have to update the objective.

Employee (Appraisee): Completes Self-Appraisal

Update and Rate an Objective Already on the Self-Appraisal Form

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Updating an Objective Already on the Performance Appraisal; and Adding an Objective Results Rating (optional)

If objectives were entered into the on-line tool at the beginning of or during the performance appraisal year or if incomplete objectives were automatically transferred from the prior appraisal period then they will be on the main appraisal page when the employee opens it. This topic provides instructions for employees updating objectives that have already been added to the on-line tool.

The Employee:

1. Clicks the *Update Details* icon to review the Objective details.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Update Standard Appraisal: Overview

Cancel Save as Draft Share with Supervisor Continue

Employee Name **Employee1, Chris**
Organization Email Address kbird@cfo.pitt.edu
Manager **Supervisor1, Pat**

Employee Number **166670**
Department **Financial Information Systems**
Job **Staff.Administrator.III**

The Self-Appraisal provides you with the opportunity to contribute significantly to improving both your own performance and your working relationship with your supervisor. The University's Performance Appraisal Program is designed to provide time for the employee and supervisor to look back over the past and realistically plan for the future.

The Self-Appraisal encourages you to be proud of your accomplishments and be candid about your areas of improvement. The questions, found in the Questionnaire section below, are intended to help you organize your thoughts and share information with your supervisor prior to receiving your performance appraisal. An essential goal of the performance appraisal meeting is that both you and your supervisor know clearly what you expect of each other and feel strongly that you can achieve your objectives by working together. Please respond to the questions completely and accurately.

Objectives

Add Objective

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective A	15-Sep-2015	15-Mar-2016					
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016				
Objective C	07-Nov-2015	11-Mar-2016					

Questionnaire

Questionnaire Name **Self-Appraisal v2** Last Submitted On

Complete Questionnaire

Employee (Appraisee): Completes Self-Appraisal

Update and Rate an Objective Already on the Self-Appraisal Form

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Updating an Objective Already on the Performance Appraisal; and Adding an Objective Results Rating (optional)

- Updates the objective details as necessary. If the page does not include any updateable fields, i.e. the data is displayed with no open boxes for typing, then skip to Step #7 below.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Update Objective

* Indicates required field

* Objective Name Objective A
 Created By Employee1, Chris
 * Start Date 15-Sep-2015
 Target Date 15-Mar-2016
 Next Review Date 15-Jan-2016
 * Priority Medium

Complete (%) 85
Date Completed

Description

Detail	Objective A is to modify the existing tasks and forms to provide a more efficient flow and faster completion of this work.
Success Criteria	Realize a 10% improvement in effort and improved performance
Comments	As of 15-Jan-16 the project is on track per the project plan and expected to finish on time.

Employee (Appraisee): Completes Self-Appraisal

Update and Rate an Objective Already on the Self-Appraisal Form

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Updating an Objective Already on the Performance Appraisal; and Adding an Objective Results Rating (optional)

3. Updates the objective as necessary.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Update Objective

* Indicates required field

Cancel Save as Draft Apply and Update Next Apply

* Objective Name Objective A Complete (%) 100
 Created By Employee1, Chris Date Completed 18-Mar-2016
 * Start Date 15-Sep-2015
 Target Date 15-Mar-2016
 Next Review Date
 * Priority Medium

Description

Detail Objective A is to modify the existing tasks and forms to provide a more efficient flow and faster completion of this work.

Success Criteria Realize a 10% improvement in effort and improved performance

Comments Project work is completed.

4. To add an objective results rating, selects the appropriate value from the drop-down box in the *Results Rating* field. (optional)
5. Enters comments supporting the rating in the *Comments* box. (required if an Objective Results Rating is entered, otherwise, optional)

Rate Yourself on This Objective

Results Rating 2-Achieved Result Hide

Comments Metrics show a 10% improvement in effort and improved performance.

Results Rating Scale

Step	Value	Rating Scale	Behavioral Indicator
1	Did Not Achieve Result		
2	Achieved Result		
3	Achieved More Than Expected Result		

Cancel Save as Draft Apply and Update Next Apply

Employee (Appraisee): Completes Self-Appraisal

Update and Rate an Objective Already on the Self-Appraisal Form

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Updating an Objective Already on the Performance Appraisal; and Adding an Objective Results Rating (optional)

6. Clicks the *Apply* button to add the objective to the appraisal and return to the main self-appraisal page. Alternatively, clicks the *Apply and Add Another* button to commit the objective and add another one or clicks the *Save as Draft* button to finish the work later (one of these is required or the data entered will be lost).
7. If the *Objective Details* section does not have any updateable fields as shown in the screen shot below, this means the objective was created by the employee's supervisor and cannot be updated by the employee.

The screenshot displays the Oracle PHR Performance Management - Employee interface. The top navigation bar includes 'ORACLE PHR Performance Management - Employee', 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below the navigation bar, there are two tabs: 'Overview' (selected) and 'Review'. The main content area is titled 'Objective Details' and includes a note '* Indicates required field'. On the right side of this section are three buttons: 'Cancel', 'Save as Draft', and 'Apply'. The objective details are as follows:

Objective Name	Objective C	Complete (%)
Created By	Supervisor1, Pat	Date Completed
Start Date	07-Nov-2015	
Target Date	11-Mar-2016	
Next Review Date		
Priority	Low	

The 'Description' section is expanded, showing:

- Detail: Objective C is to modify the existing tasks and forms to provide a more efficient flow and faster completion of work.
- Success Criteria: Realize 50% improvement in effort and performance.
- Comments: (empty)

Employee (Appraisee): Completes Self-Appraisal

Update and Rate an Objective Already on the Self-Appraisal Form

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Objectives
Task	Updating an Objective Already on the Performance Appraisal; and Adding an Objective Results Rating (optional)

8. In this case, to update the supervisor about the status of this objective, clicks the *Quick Update* icon.

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result			
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result			
Objective C	07-Nov-2015	11-Mar-2016					

9. Enters comments that will enable the supervisor to update the objective.

Objective Quick Update

Objective Name **Objective C** Target Date **11-Mar-2016**

Measurement Style **None** Complete (%)

[Change to Plain Text Mode](#)

B *I* U

Comments: This project was completed on March 10, 2016. The results metrics have been uploaded to SharePoint.

NOTE: Even if the objective was entered by the supervisor and cannot be updated by the employee, the employee can still follow Steps 4 & 5 above to enter their *Objective Results Rating*.

Employee (Appraisee): Completes Self-Appraisal

Complete the Self-Appraisal Questionnaire

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Questionnaire
Task	Completes the Questionnaire (optional)

The self-appraisal questionnaire has five questions the employee can answer to provide input to the supervisor. The answers can be typed directly into the online tool or copied and pasted from a word document. Completing the questionnaire is optional and the employee can opt to complete some, all or none of it. Supervisors can require that their direct reports complete the questionnaire.

The Employee:

1. Clicks the *Complete Questionnaire* button at the bottom of the self-appraisal.

The screenshot displays the 'Objectives' section with a table of three objectives and a 'Questionnaire' section below it. The 'Complete Questionnaire' button is circled in purple.

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result			
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result			
Objective C	07-Nov-2015	11-Mar-2016					

Questionnaire Name: Self-Appraisal v2 Last Submitted On: Complete Questionnaire

Employee (Appraisee): Completes Self-Appraisal

Complete the Self-Appraisal Questionnaire

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Questionnaire
Task	Completes the Questionnaire (optional)

- Answers the questionnaire questions by either typing in the text boxes or by copying and pasting from a word document(s).

The screenshot shows the Oracle PHR Performance Management - Employee interface. The top navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". Below the navigation bar, there are two progress indicators: "Overview" (active) and "Review". The main content area is titled "Answer Questionnaire" and contains a "Cancel" and "Apply" button. The questionnaire consists of five text input fields with the following questions and answers:

Complete the questionnaire and click Apply to submit the questionnaire.	
Describe your most significant accomplishments this past year.	This year I completed three large projects both designed to improve efficiency and speed up processing time. All three of these projects are listed in the Objectives section of the self-appraisal. I found all three projects very challenging but also very enjoyable and I hope to be able to complete similar work in the future.
Describe any barriers or challenges that impacted you in effectively completing your job responsibilities or accomplishing your goals.	Throughout the work I did this past year I often had difficulty getting time with people who were necessary to the project. In some cases it was a reluctance to change procedures that have been in place for a long time and in others these projects simply weren't viewed as important.
Please list your area(s) of strength and area(s) of improvement.	Through the work I have done this year I believe I have greatly improved my organizational and project management skills. I learned to use Microsoft Project Management software and developed an effective set of communications for project work.
What skills or new knowledge would you like to develop to improve your performance?	I think it would be helpful to take some project management training and perhaps get my project management certification.
Is there any other information you would like to share with your supervisor regarding your work performance?	As mentioned above I am enjoying this project work and hope I will be assigned additional projects this year.

Employee (Appraisee): Completes Self-Appraisal

Complete the Self-Appraisal Questionnaire

Swim Lane	Employee (Appraisee)
Flow Block	Completes Self-Appraisal - Questionnaire
Task	Completes the Questionnaire (optional)

3. Clicks the *Apply* button to save the responses and return to the *Appraisal Overview* page.

NOTE: After the questionnaire is saved for the first time or the *Apply* button is pressed, a date will be defaulted into the *Last Submitted On* field. This is the only indication on the *Appraisal Overview* page that the questionnaire has been completed.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Update Standard Appraisal: Overview

Cancel Save as Draft Share with Supervisor Continue

Employee Name **Employee1, Chris** Employee Number **166670**
 Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

The Self-Appraisal provides you with the opportunity to contribute significantly to improving both your own performance and your working relationship with your supervisor. The University's Performance Appraisal Program is designed to provide time for the employee and supervisor to look back over the past and realistically plan for the future.

The Self-Appraisal encourages you to be proud of your accomplishments and be candid about your areas of improvement. The questions, found in the Questionnaire section below, are intended to help you organize your thoughts and share information with your supervisor prior to receiving your performance appraisal. An essential goal of the performance appraisal meeting is that both you and your supervisor know clearly what you expect of each other and feel strongly that you can achieve your objectives by working together. Please respond to the questions completely and accurately.

Objectives

Add Objective

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result			
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result			
Objective C	07-Nov-2015	11-Mar-2016					

Questionnaire

Questionnaire Name **Self-Appraisal v2** Complete Questionnaire

Last Submitted On **23-Mar-2016**

Cancel Save as Draft Share with Supervisor Continue

Employee (Appraisee): Shares Self-Appraisal with Supervisor (Main Appraiser)

Transfer Ownership of Appraisal to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Self-Appraisal with Supervisor (Main Appraiser)
Task	Transfers Ownership to Supervisor (required)

Because the Performance Management online tool is workflow driven, the system controls who has 'ownership' of the appraisal. Only one person at a time can have access or 'ownership.' Therefore, once the employee has completed the self-appraisal, they must transfer ownership to their supervisor (Main Appraiser) to allow the performance appraisal process to continue. This step must be done regardless of whether or not the employee has completed the self-appraisal.

The Employee:

1. Clicks the *Share with Supervisor* button at the top of the *Appraisal Overview* page.

The screenshot shows the Oracle PHR Performance Management - Employee interface. At the top, there is a navigation bar with 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below this, there are tabs for 'Overview' and 'Review'. The main content area displays the 'Update Standard Appraisal: Overview' page. A row of buttons includes 'Cancel', 'Save as Draft', 'Share with Supervisor' (circled in red), and 'Continue'. Below the buttons, employee and supervisor information is listed: Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Manager: Supervisor1, Pat; Employee Number: 166670; Department: Financial Information Systems; Job: Staff.Administrator.III. There are two paragraphs of instructional text about the self-appraisal process. Below this is a table of objectives with columns for Objective Name, Start Date, Target Date, Date Completed, Employee Results Rating, Duplicate, Update Details, and Quick Update. At the bottom, there is a 'Questionnaire' section with a 'Complete Questionnaire' button and the text 'Questionnaire Name Self-Appraisal v2' and 'Last Submitted On 23-Mar-2016'.

Employee (Appraisee): Shares Self-Appraisal with Supervisor (Main Appraiser)

Transfer Ownership of Appraisal to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Self-Appraisal with Supervisor (Main Appraiser)
Task	Transfers Ownership to Supervisor (required)

2. If desired, enters a message to their supervisor in the *Notification Message for Supervisor* box.

ORACLE[®] PHR Performance Management - Employee

Home Logout Preferences Help

Share Appraisal Details with Supervisor

Click Submit to transfer ownership of this appraisal to your supervisor.

Cancel Submit

Notification Message for Supervisor

I have completed the self-appraisal. Please let me know if you have any questions or need additional information.

Regards,
Chris

Cancel Submit

3. Clicks the *Submit* button.

Employee (Appraisee): Shares Self-Appraisal with Supervisor (Main Appraiser)

Transfer Ownership of Appraisal to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Self-Appraisal with Supervisor (Main Appraiser)
Task	Transfers Ownership to Supervisor (required)

- Reviews the *Confirmation* message saying that the appraisal has been transferred to their Supervisor/Main Appraiser. Notes that the *Update Self-Appraisal* icon is now gray.

The screenshot shows the Oracle PHR Performance Management interface for an employee. At the top, there is a navigation bar with 'Appraisals' and 'Performance Management' tabs. Below this, a confirmation message states: 'Ownership of your appraisal has transferred to your main appraiser. You cannot update the appraisal again until the main appraiser returns ownership of the appraisal to you and requests your input.' Below the message is a table titled 'Appraisals of Employee1, Chris'. The table has columns for Initiator, Appraisal Date, Supervisor, Appraisal Purpose, Status, View Appraisal Details/Give Feedback, and Update Self-Appraisal. The 'Update Self-Appraisal' column for the first row is circled in purple, indicating that this button is now disabled (gray).

Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View Appraisal Details/Give Feedback	Update Self-Appraisal
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Ongoing with Supervisor		

- Logs out of PRISM.
The employee's supervisor receives email and workflow notifications saying that the employee has transferred ownership.

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

Supervisors cannot view appraisals until employees transfer ownership to them. Once workflow/email notifications are received saying that an appraisal has been transferred, then the supervisor can log in to PRISM to view the self-appraisal and continue the performance appraisal process.

Steps:

1. Log in to PRISM.
2. Select the *PHR Performance Management – Supervisor* responsibility.
3. Select 'Performance Management' to access the *Supervisor Dashboard*.

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

4. Finds the *Task* for the current year (the name changes each year).
5. Clicks the *Go To Task* icon.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Logged In As Supervisor1, Pat

On this page, you can access worker development functions and view performance management notification messages.

Performance Management Task List

[Expand All](#) | [Collapse All](#)

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Fiscal 2016 Non-Supervisory		21-Mar-2016	16-Apr-2016	
<input type="checkbox"/> Manage appraisals: Appraisal-Non-Supervisory Role v3	Appraisal	21-Mar-2016	16-Apr-2016	

Notifications Awaiting Your Attention

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
No results found.							

Switch Manager
To perform tasks as a different manager, select from the list.

Reports
• [Appraisal Summary](#)

Help

Plan	Click to Access Help Documents
Fiscal 2016 Non-Supervisory	

[Click here to access the Performance Management website.](#)

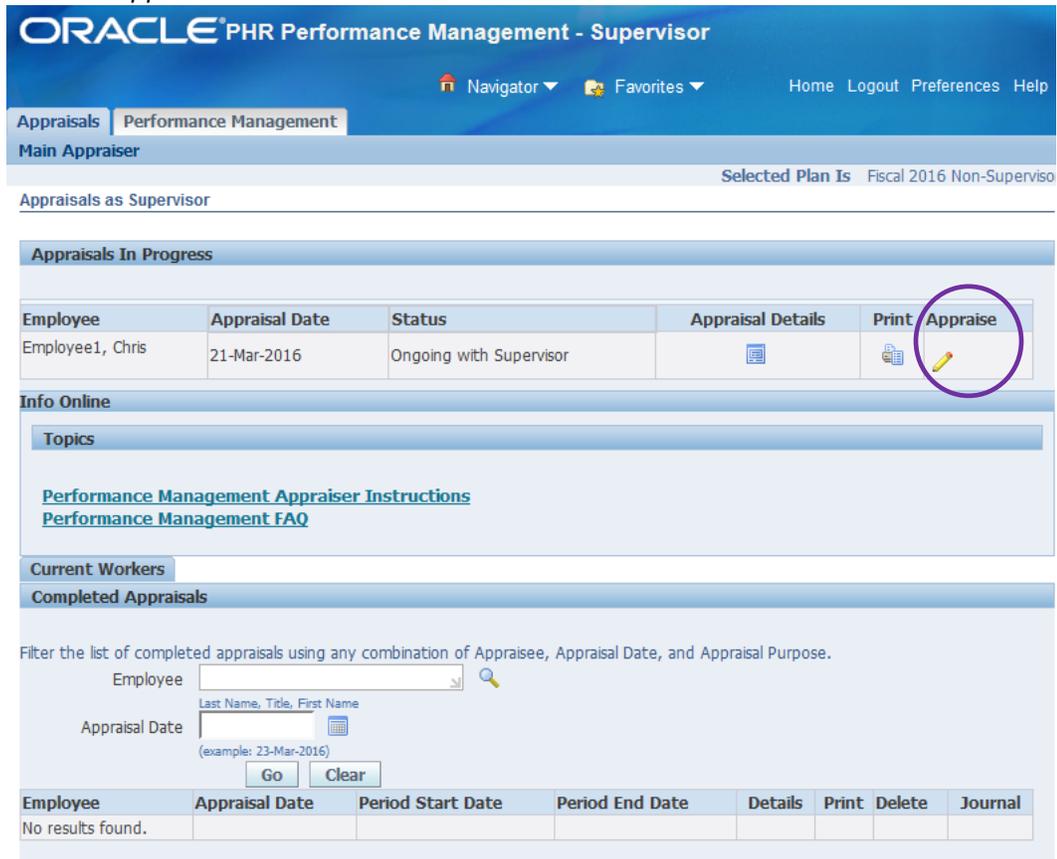
6. The *Appraisal Summary* page will open.

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

7. Click the *Appraise* icon.



ORACLE[®] PHR Performance Management - Supervisor

Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser

Selected Plan Is Fiscal 2016 Non-Supervis

Appraisals as Supervisor

Appraisals In Progress

Employee	Appraisal Date	Status	Appraisal Details	Print	Appraise
Employee1, Chris	21-Mar-2016	Ongoing with Supervisor			

Info Online

Topics

[Performance Management Appraiser Instructions](#)
[Performance Management FAQ](#)

Current Workers

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Employee

Last Name, Title, First Name

Appraisal Date

(example: 23-Mar-2016)

Go Clear

Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
No results found.							

8. Scroll to the bottom of the *Supervisor Review* page to view the self-appraisal information.
9. Click the *Show* link to see the details of the objectives.

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

10. Click the *Show Questionnaire* link to see the responses.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review

Share with Employee Update Appraisal Give Final Ratings

Employee Name **Employee1, Chris** Employee Number **166670**
 Organization Email Address **kbrd@cfo.pitt.edu** Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

Setup Details

Initiator **Employee1, Chris** Supervisor **Supervisor1, Pat**
 Appraisal Purpose Status Appraisal Date **21-Mar-2016**
 Template **Appraisal-Non-Supervisory Role v3** Next Appraisal Date

Overall Rating and Comments

Overall Rating
 Overall Comments
 Employee Feedback

Manage Participants

Add Participant

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Participation Date	Notified Date	Comments	Update	Delete
	No results found.								

Competencies

Show All Details Hide All Details

Details	Competency	Supervisor Performance Rating
Show	Core.Composure	
Show	Core.Decision Making	
Show	Core.Initiating Action	
Show	Core.Interpersonal Communication	
Show	Core.Job Knowledge/Functional and Technical Skills	
Show	Core.Organizing and Planning	
Show	Core.Quality of Work	
Show	Core.Service Orientation	
Show	Core.Work Habits	

Objectives

Show All Details Hide All Details

Details	Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating
Show	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	
Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	
Show	Objective C	07-Nov-2015	11-Mar-2016			

Questionnaire: Employee

Questionnaire Name **Self-Appraisal v2** Last Submitted On **23-Mar-2016**

Show Questionnaire

Return to Summary

Share with Employee Update Appraisal Give Final Ratings

Home Logout Preferences Help

Copyright (c) 2006, Oracle. All rights reserved.

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

11. Review the objective information completed by the employee.

Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating
Hide	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	

Additional Details

Created By: Employee1, Chris
 Detail: Objective A is to modify the existing tasks and forms to provide a more efficient flow and faster completion of this work.

Success Criteria: Realize a 10% improvement in effort and improved performance

Comments: Project work is completed.

Next Review Date:
 Priority: Medium
 Complete (%): 100

Additional Details: Employee

Appraised Result: Metrics show a 10% improvement in effort and improved performance.

Additional Details: Supervisor

Appraised Result:

Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	
Show	Objective C	07-Nov-2015	11-Mar-2016			

Supervisor (Main Appraiser): Reviews the Self-Appraisal

Review the Self-Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Reviews the Self-Appraisal (required)
Task	Reviews the Completed Self-Appraisal

12. Review the questionnaire responses completed by the employee.

Questionnaire: Employee	
Questionnaire Name Self-Appraisal v2 Last Submitted On 23-Mar-2016	
Hide Questionnaire	
Questions	Answers
Describe your most significant accomplishments this past year.	This year I completed three large projects both designed to improve efficiency and speed up processing time. All three of these projects are listed in the Objectives section of the self-appraisal. I found all three projects very challenging but also very enjoyable and I hope to be able to complete similar work in the future.
Describe any barriers or challenges that impacted you in effectively completing your job responsibilities or accomplishing your goals.	Throughout the work I did this past year I often had difficulty getting time with people who were necessary to the project. In some cases it was a reluctance to change procedures that have been in place for a long time and in others these projects simply weren't viewed as important.
Please list your area(s) of strength and area(s) of improvement.	Through the work I have done this year I believe I have greatly improved my organizational and project management skills. I learned to use Microsoft Project Management software and developed an effective set of communications for project work.
What skills or new knowledge would you like to develop to improve your performance?	I think it would be helpful to take some project management training and perhaps get my project management certification.
Is there any other information you would like to share with your supervisor regarding your work performance?	As mentioned above I am enjoying this project work and hope I will be assigned additional projects this year.

[Return to Summary](#)

[Share with Employee](#)

[Update Appraisal](#)

[Give Final Ratings](#)

13. If the self-appraisal does not need to go back to the employee for additional work, skip to the next chapter.

Supervisor (Main Appraiser): Questions on Self-Appraisal? - Yes

Share Ownership Back to Employee for Additional Work

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Questions on Self-Appraisal? – Yes (optional)
Task	Share Ownership Back to Employee (Appraisee)

If the supervisor determines that additional work must be done on the self-appraisal before they can complete their part of the performance appraisal then the appraisal must be transferred back to the employee.

Steps:

1. Click the *Share with Employee* button to return ownership of the appraisal to the Employee.

The screenshot displays the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE PHR Performance Management - Supervisor". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". The main content area is titled "Supervisor Review" and contains several sections:

- Supervisor Review:** This section includes a "Share with Employee" button (circled in purple), "Update Appraisal", and "Give Final Ratings" buttons. Below these buttons, the following information is displayed:
 - Employee Name: Employee1, Chris
 - Organization Email Address: kbird@cfo.pitt.edu
 - Employee Number: 166670
 - Department: Financial Information Systems
 - Manager: Supervisor1, Pat
 - Job: Staff.Administrator.III
- Setup Details:** This section includes a "Change Main Appraiser" button and the following information:
 - Initiator: Employee1, Chris
 - Appraisal Purpose: Appraisal-Non-Supervisory Role v3
 - Supervisor: Supervisor1, Pat
 - Appraisal Date: 21-Mar-2016
 - Next Appraisal Date: (blank)
- Overall Rating and Comments:** This section includes links for "Overall Rating", "Overall Comments", and "Employee Feedback".

Supervisor (Main Appraiser): Questions on Self-Appraisal? - Yes

Share Ownership Back to the Employee for Additional Work

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Questions on Self-Appraisal? – Yes (optional)
Task	Share Ownership Back to Employee (Appraisee)

- When the *Share Appraisal Details with Employee* page opens, check the *Update Appraisal* box in the *Employee Permissions* block by clicking on it. Ensure that none of the other boxes on the page are checked.

NOTE: if the *Update Appraisal* box is not checked the employee will not be able to update the self-appraisal form.

- Click the *Submit* button to complete the transfer and return to the *Appraisals Summary* page.

Supervisor (Main Appraiser): Questions on Self-Appraisal? - Yes

Share Ownership Back to the Employee for Additional Work

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Questions on Self-Appraisal? – Yes (optional)
Task	Share Ownership Back to Employee (Appraisee)

4. The *Appraisals Summary* page will display a confirmation message that the appraisal has been transferred to the employee and the *Appraise* icon will now be gray.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Appraisals" and "Performance Management" tabs, and "Main Appraiser" is selected. The "Selected Plan Is" is "Fiscal 2016 Non-Supervisor". A confirmation message states: "The appraisal has been transferred to the Employee". Below this, the "Appraisals In Progress" table is displayed:

Employee	Appraisal Date	Status	Appraisal Details	Print	Appraise
Employee1, Chris	21-Mar-2016	Transferred to Employee			

The "Appraise" icon in the table is circled in purple. Below the table, there is an "Info Online" section with a "Topics" link.

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers to Participate in the Appraisal

In certain situations, the supervisor might wish to invite additional people to participate in the performance appraisal process. The on-line tool allows supervisors to easily invite additional people to participate as either additional appraisers or additional reviewers. Additional appraisers can rate the employee on the same set of competencies as the supervisor. Additional reviewers can submit narrative text about the employee's performance. This chapter focuses on inviting additional appraisers. Please refer to the next chapter for information about inviting additional reviewers.

Examples of when a supervisor might invite an additional appraiser:

If the employee temporarily worked in a different area and reported to someone other than the supervisor of record for part of the appraisal year; or

- If the employee transferred to the current supervisor part way through the appraisal year.
- If the employee actually reported to someone other than their supervisor of record for the entire performance year, it might be more appropriate to change the Main Appraiser.

NOTE: A person must have a University Account to participate in the performance appraisal process.

If it is not necessary to invite additional appraisers, skip to the next chapter.

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers

Steps:

1. Click on the *Add Participant* button

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "Supervisor Review". At the top right, there are navigation links: Home, Logout, Preferences, and Help. Below the title bar, there are three buttons: "Share with Employee", "Update Appraisal", and "Give Final Ratings".

Employee Information:

- Employee Name: **Employee1, Chris**
- Organization Email Address: kbird@cfo.pitt.edu
- Employee Number: **166670**
- Department: **Financial Information Systems**
- Manager: **Supervisor1, Pat**
- Job: **Staff.Administrator.III**

Setup Details:

- Initiator: **Employee1, Chris**
- Appraisal Purpose Status: **Appraisal-Non-Supervisory Role v3**
- Supervisor: **Supervisor1, Pat**
- Appraisal Date: **21-Mar-2016**
- Next Appraisal Date: (blank)

Overall Rating and Comments:

- Overall Rating
- Overall Comments
- Employee Feedback

Manage Participants:

An "Add Participant" button is circled in purple. Below it is a table with the following columns: Full Select Name, Participation Type, Participation Questionnaire Name, Participation Status, Last Notified Date, Date Completed, Comments, Update, and Delete. The table currently shows "No results found."

Competencies:

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers

2. Type all or part of the additional appraiser's last name in the *Participant Name* field and tab or click the *Magnifying Glass* icon.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >

Add Participant

* Indicates required field

* Participant Name

Last Name, Title, First Name

* Participation Type

Cancel Apply

Participation Type

TIP

- Appraisers can update competencies and objectives, complete questionnaires, and provide overall comments.
- Reviewers can view others' evaluations and provide comments, but cannot complete questionnaires.
- Other participants can complete questionnaires and enter overall comments. They cannot view others evaluations. You can select other participants for 360-degree appraisals only.

3. Click the *Quick Select* icon beside the appropriate person's name.

Search and Select: Participant Name

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results

Select	Quick Select	Full Name	Job	Department	Business Group	Email Address
<input type="radio"/>		Bird, Birdy	Staff.Administrator.III	Financial Information Systems	Univ of Pittsburgh	kbird@cfo.pitt.edu
<input type="radio"/>		Bird, Karen	Purchaser.Purchaser.Purchaser	Financial Information Systems	Univ of Pittsburgh	kab178@pitt.edu

4. Select 'Appraiser' from the drop down box in the *Participation Type* field. Remember, the person must have a University Account to access the appraisal.
5. Leave the *Questionnaire Template* field blank.

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers

- Click the *Apply* button to return to the *Supervisor Review* page.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >

Add Participant

* Indicates required field

* Participant Name: Bird, Karen

* Participation Type: Appraiser

Questionnaire Template: []

Participation Type

TIP

- Appraisers can update competencies and objectives, complete questionnaires, and provide overall comments.
- Reviewers can view others' evaluations and provide comments, but cannot complete questionnaires.
- Other participants can complete questionnaires and enter overall comments. They cannot view others evaluations. You can select other participants for 360-degree appraisals only.

Reset to Default Questionnaire

- The additional appraiser is added with a default *Participation Status* of 'Closed.'
- To send an invitation notification to the additional appraiser, click the *Select* checkbox beside their name and click the *Request Feedback* button.

Overall Rating and Comments

Overall Rating
Overall Comments
Employee Feedback

Manage Participants

Select Participant | **Request Feedback** | Prevent Feedback | Add Participant

Select All | Select None

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input checked="" type="checkbox"/>	Bird, Karen	Appraiser		Closed					

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers

9. Enter a message to the additional appraiser in the *Notification Message* text box.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >
Request Feedback

Cancel Submit

Selected Participants

Full Name	Participation Type	Last Notified Date	Date Completed	Questionnaire Name
Bird, Karen	Appraiser			

Notification Message

Hi Karen,

Since you were Chris' supervisor for half the year, please complete the performance appraisal based on the work completed under your supervision. I appreciate your input.

Regards,
Karen

Cancel **Submit**

10. Click the *Submit* button.

11. After the request is submitted, the *Participation Status* will change to “Open”.

Manage Participants

Select Participant Request Feedback Prevent Feedback | Add Participant

Select All | Select None

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input type="checkbox"/>	Bird, Karen	Appraiser		Open	23-Mar-2016				

12. The additional appraiser will receive an email message asking them to appraise the employee.

13. They must access the appraisal by clicking the link at the bottom of the email and logging in with their University login and password.

Supervisor (Main Appraiser): Invite Additional Appraisers? - Yes

Invite Additional Appraisers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Appraisers? – Yes (optional)
Task	Invite Additional Appraisers

14. Once the additional appraisal is complete, the supervisor will receive a workflow notification/email and the *Participation Status* changes to “Complete”.

15. Click the *Comments* icon to view the additional appraisal.

The screenshot shows the 'Manage Participants' interface. At the top, there are buttons for 'Request Feedback', 'Prevent Feedback', and 'Add Participant'. Below these are 'Select All' and 'Select None' links. The main table has the following columns: Full Name, Participation Type, Questionnaire Name, Participation Status, Last Notified Date, Date Completed, Comments, Update, and Delete. The first row of data shows 'Bird, Karen' as the appraiser, with a status of 'Completed', a last notified date of '3-Mar-2016', and a date completed of '23-Mar-2016'. The 'Participation Status' and 'Comments' columns for this row are circled in purple.

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input type="checkbox"/>	Bird, Karen	Appraiser		Completed	3-Mar-2016	23-Mar-2016			

16. The supervisor should incorporate the information from any additional participants into their ratings of the employee’s performance.

17. If desired, the additional participant’s input can be printed.

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

In certain situations, the supervisor might wish to invite additional people to participate in the performance appraisal process. The on-line tool allows supervisors to easily invite additional people to participate as either additional appraisers or additional reviewers. Additional appraisers can rate the employee on the same set of competencies as the supervisor. Additional reviewers can submit narrative text about the employee's performance. This chapter focuses on inviting additional reviewers. Please refer to the prior chapter for information about inviting additional appraisers.

Examples of when a supervisor might invite an additional reviewer:

- The employee worked on a project or as part of a team and the supervisor would like input from the team members

NOTE: A person must have a University account to participate in the performance appraisal process.

If it is not necessary to invite additional reviewers, skip to the next chapter.

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

Steps:

1. Click on the *Add Participant* button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. At the top, there is a blue header with the Oracle logo and navigation links like 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below the header, the page title is 'Supervisor Review'. There are three buttons: 'Share with Employee', 'Update Appraisal', and 'Give Final Ratings'. The main content area displays employee information for 'Employee1, Chris' (Employee Number: 166670, Department: Financial Information Systems, Job: Staff.Administrator.III) and their manager 'Supervisor1, Pat'. Below this is the 'Setup Details' section, which includes fields for Initiator, Appraisal Purpose, Status, Template, Supervisor, Appraisal Date, and Next Appraisal Date. A 'Change Main Appraiser' button is also present. The 'Overall Rating and Comments' section shows fields for Overall Rating, Overall Comments, and Employee Feedback. The 'Manage Participants' section features a table with columns for Full Name, Participation Type, Questionnaire Name, Participation Status, Last Notified Date, Date Completed, Comments, Update, and Delete. The 'Add Participant' button is circled in purple. The 'Competencies' section is partially visible at the bottom.

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

2. Type all or part of the additional reviewer's last name in the *Participant Name* field and tab or click the *Magnifying Glass* icon.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >

Add Participant

* Indicates required field

* Participant Name 

* Participation Type

Cancel Apply

Participation Type

 TIP

- Appraisers can update competencies and objectives, complete questionnaires, and provide overall comments.
- Reviewers can view others' evaluations and provide comments, but cannot complete questionnaires.
- Other participants can complete questionnaires and enter overall comments. They cannot view others evaluations. You can select other participants for 360-degree appraisals only.

3. Click the *Quick Select* icon beside the appropriate person's name.

Search and Select: Participant Name

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results

Select	Quick Select	Full Name	Job	Department	Business Group	Email Address
<input type="radio"/>		Bird, Birdy	Staff.Administrator.III	Financial Information Systems	Univ of Pittsburgh	kbird@cfo.pitt.edu
<input type="radio"/>		Bird, Karen	Purchaser.Purchaser.Purchaser	Financial Information Systems	Univ of Pittsburgh	kab178@pitt.edu

4. Select 'Reviewer' from the drop down box in the *Participation Type* field. Remember, the person must have a University account to access the appraisal.

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

5. Click the *Apply* button to return to the *Supervisor Review* page.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >
Add Participant

* Indicates required field

* Participant Name:

* Participation Type:

Participation Type

✓ TIP

- Appraisers can update competencies and objectives, complete questionnaires, and provide overall comments.
- Reviewers can view others' evaluations and provide comments, but cannot complete questionnaires.
- Other participants can complete questionnaires and enter overall comments. They cannot view others evaluations. You can select other participants for 360-degree appraisals only.

6. The additional reviewer is added with a default *Participation Status* of 'Closed'.
7. To send an invitation notification to the additional reviewer requesting their input, click the *Select* checkbox beside their name and click the *Request Feedback* button.

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input type="checkbox"/>	Bird, Karen	Appraiser		Completed	23-Mar-2016	23-Mar-2016			
<input checked="" type="checkbox"/>	Employee12, Anthony	Reviewer		Closed					

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

8. Enter a message to the additional appraiser in the *Notification Message* text box.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "Supervisor Review > Request Feedback". There are navigation links for "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". A "Cancel" button and a "Submit" button (circled in red) are visible. Below the buttons is a "Selected Participants" section with a table:

Full Name	Participation Type	Last Notified Date	Date Completed	Questionnaire Name
Employee12, Anthony	Reviewer			

Below the table is a "Notification Message" text box containing the following text:

Hi Anthony,
Please provide feedback about Chris' performance as part of the QTK Team earlier in the year.
Thank you,
Pat

9. Click the *Submit* button.

10. After the request is submitted, the *Participation Status* will change to "Open".

The screenshot shows the "Manage Participants" section of the Oracle PHR Performance Management - Supervisor interface. It includes buttons for "Request Feedback", "Prevent Feedback", and "Add Participant". Below the buttons are "Select All" and "Select None" links. The main table is as follows:

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input type="checkbox"/>	Bird, Karen	Appraiser		Completed	23-Mar-2016	23-Mar-2016			
<input type="checkbox"/>	Employee12, Anthony	Reviewer		Open	23-Mar-2016				

11. The additional reviewer will receive an email message asking them to review the employee.
12. They must access the appraisal by clicking the link at the bottom of the email and log in with their University login and password.
13. Once the additional review is complete the *Participation Status* will change to "Complete".
14. Click the *Comments* icon to view the additional reviewer's input.

Supervisor (Main Appraiser): Invite Additional Reviewers? - Yes

Invite Additional Reviewers

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Invite Additional Reviewers? – Yes (optional)
Task	Invite Additional Reviewers to Participate in the Appraisal

15. The supervisor should incorporate the information from any additional participants into their ratings of the employee's performance.
16. If desired, the additional participant's input can be printed.

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

The on-line performance appraisal tool has three main sections as follows:

- Competencies
- Objectives
- Questionnaire

This chapter focuses on the Competencies section.

There are nine core competencies that apply to all staff. There are an additional three competencies that are specifically for staff who supervise others.

Steps:

1. Review the previous chapters for instructions on logging in and navigating through the dashboard, the *Appraisal Summary* page to the *Supervisor Review* page.
2. From the *Supervisor Review* page, click the *Update Appraisal* button to open the *Update Appraisal* page.

The screenshot displays the Oracle PHR Performance Management - Supervisor interface. At the top, there is a blue header with the Oracle logo and the text 'ORACLE® PHR Performance Management - Supervisor'. Below the header, there are navigation links: 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. The main content area is titled 'Supervisor Review' and contains three buttons: 'Share with Employee', 'Update Appraisal' (circled in purple), and 'Submit for Approval'. Below the buttons, there are two columns of information. The left column shows: Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Manager: Supervisor1, Pat. The right column shows: Employee Number: 166670; Department: Financial Information Systems; Job: Staff.Administrator.III. Below this information is a 'Setup Details' section with a 'Change Main Appraiser' button. The Setup Details section shows: Initiator: Employee1, Chris; Appraisal Purpose: Status; Template: Appraisal-Non-Supervisory Role v3; Supervisor: Supervisor1, Pat; Appraisal Date: 21-Mar-2016; Next Appraisal Date.

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

3. The *Update Appraisal* page will open.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >
Update Appraisal

Employee Name: **Employee1, Chris** Employee Number: **166670**
 Organization Email Address: chr1@cf10.2b1c.edu Department: **Financial Information Systems**
 Manager: **Supervisor1, Pat** Job: **Staff.Administrator.III**

Buttons:

Competencies

This performance appraisal process is designed to evaluate an employee's performance over a specified period of time. When the process works well, the employee and his/her supervisor plan together to build on strengths and develop those areas needing improvement. During the performance appraisal session, time is set aside to: 1) Restate expectations about job responsibilities and performance standards; 2) Evaluate job performance against previous expectations; and 3) Discuss future development opportunities and relate them to organizational needs.

In evaluating an employee's performance, you are to identify strengths and areas of performance which require improvement. You are asked to provide examples of the employee's performance to illustrate the ratings you give. Examples based on your own observations work best. However, second-hand observations are permissible if you have verified the information. Such examples clarify your message.

Each Competency is composed of two segments: Type.Name and has behavioral factors. Consider each of the behavioral factors when selecting the rating for the Competency. Examples that support the rating can be provided by clicking the *Update Details* icon and entering them in the *Comments* box.

Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure (i)	(i)		
Core.Decision Making (i)	(i)		
Core.Initiating Action (i)	(i)		
Core.Interpersonal Communication (i)	(i)		
Core.Job Knowledge/Functional and Technical Skills (i)	(i)		
Core.Organizing and Planning (i)	(i)		
Core.Quality of Work (i)	(i)		
Core.Service Orientation (i)	(i)		
Core.Work Habits (i)	(i)		

Objectives

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating	Duplicate	Update Comments	Delete
Show Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result				
Show Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result				
Show Objective C	07-Nov-2015	11-Mar-2016						

Questionnaire: Employee

Questionnaire Name: **Self-Appraisal v2** Last Submitted On: **23-Mar-2016**

[Show Questionnaire](#)

Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments:

Overall Rating and Comments

Overall Rating:

Overall Comments:

Buttons:

Home Logout Preferences Help
Copyright (c) 2006, Oracle. All rights reserved.

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

- If desired, the supervisor can click the *Show Questionnaire* link towards the bottom of the page to review the employee's responses.
- The competencies will be listed in the *Competencies* section. To appraise the competencies, click the *Update Details* link.

Supervisor Review >
Update Appraisal

Employee Name: **Employee1, Chris**
Organization Email Address: kbird@cfo.pitt.edu
Manager: **Supervisor1, Pat**

Employee Number: **166670**
Department: **Financial Information Systems**
Job: **Staff.Administrator.III**

Competencies

This performance appraisal process is designed to evaluate an employee's performance over a specified period of time. When the process works well, the employee and his/her supervisor plan together to build on strengths and develop those areas needing improvement. During the performance appraisal session, time is set aside to: 1) Restate expectations about job responsibilities and performance standards; 2) Evaluate job performance against previous expectations; and 3) Discuss future development opportunities and relate them to organizational needs.

In evaluating an employee's performance, you are to identify strengths and areas of performance which require improvement. You are asked to provide examples of the employee's performance to illustrate the ratings you give. Examples based on your own observations work best. However, second-hand observations are permissible if you have verified the information. Such examples clarify your message.

Each Competency is composed of two segments: Type.Name and has behavioral factors. Consider each of the behavioral factors when selecting the rating for the Competency. Examples that support the rating can be provided by clicking the *Update Details* icon and entering them in the *Comments* box.

Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure			
Core.Decision Making			
Core.Initiating Action			
Core.Interpersonal Communication			
Core.Job Knowledge/Functional and Technical Skills			
Core.Organizing and Planning			
Core.Quality of Work			
Core.Service Orientation			
Core.Work Habits			

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

6. The *Competency Details* page will open displaying the *Competency Name* and the *Behavioral Indicators* that should be considered when determining a performance rating for the competency.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The breadcrumb trail is: Supervisor Review > Update Appraisal > Competency Details. The page title is "Competency Details" and the competency is "Core.Composeure". The behavioral indicator is "Behavioral Factors for Composure", which includes three bullet points: "Maintains effective performance under pressure.", "Copes effectively and develops effective approaches to deal with pressure or stress.", and "Presents a positive disposition and maintains constructive interpersonal relationships when under stress." Below this is a section titled "Rate Appraisee On This Competency" with instructions to consider behavioral factors and include examples in the comments box. The "Performance Rating" field is a drop-down menu, and the "Comments" field is a text area. To the right is a "Performance Rating Scale" table with 5 steps.

Step Value	Rating Scale	Behavioral Indicator
1	Unsatisfactory	Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).
2	Needs Development	Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months).
3	Successful	Work is fully satisfactory; employee consistently meets and occasionally may exceed performance standards. This represents the expected level of performance as established by the supervisor.
4	Above Expectations	Work is fully satisfactory and often exceeds performance standards.
5	Exceptional	Work performance consistently exceeds performance standards.

7. Select the appropriate value from the drop down list in the *Performance Rating* field.

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

8. In the *Comments* box, enter examples in support of the selected rating.

ORACLE[®]PHR Performance Management - Supervisor

Supervisor Review > Update Appraisal >

Competency Details

Competency: Core.Composure

Behavioral Indicator

Behavioral Factors for Composure:

- Maintains effective performance under pressure.
- Copes effectively and develops effective approaches to deal with pressure or stress.
- Presents a positive disposition and maintains constructive interpersonal relationships when under stress.

Rate Appraisee On This Competency

Consider the Behavioral Factors listed above when determining the Performance Rating for this competency. Examples should be included in the *Comments* box.

Examples MUST be included in the *Comments* box if the Performance Rating is "Unsatisfactory" or "Needs Development."

Competency Name: Core.Composure

Performance Rating: 3-Successful

Comments: Handles the heavy volume that flows through the department every day without becoming flustered or unprofessional. Is very good at handling issues and emergencies that come up weekly. Is always professional and pleasant with coworkers.

Step Value	Rating Scale	Behavioral Indicator
1	Unsatisfactory	Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).
2	Needs Development	Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months).
3	Successful	Work is fully satisfactory; employee consistently meets and occasionally may exceed performance standards. This represents the expected level of performance as established by the supervisor.
4	Above Expectations	Work is fully satisfactory and often exceeds performance standards.
5	Exceptional	Work performance consistently exceeds performance standards.

9. When finished the input for the first competency, click the *Apply and Update Next* button to move to rate the next competency. Alternatively, click the *Apply* button to return to the *Update Appraisal* page or click the *Save as Draft* button to save the work for later.

Supervisor (Main Appraiser): Appraises Performance

Appraise Performance

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Completes the Performance Appraisal (optional)

10. Once a rating is entered for a competency, that rating is visible on the *Update Appraisal* page.

ORACLE[®]PHR Performance Management - Supervisor

Supervisor Review >
Update Appraisal

Employee Name: **Employee1, Chris**
 Organization Email Address: kbird@cfo.pitt.edu
 Manager: **Supervisor1, Pat**

Employee Number: **166670**
 Department: **Financial Information Systems**
 Job: **Staff.Administrator.III**

Competencies

This performance appraisal process is designed to evaluate an employee's performance over a specified period of time. When the process works well, the employee and his/her supervisor plan together to build on strengths and develop those areas needing improvement. During the performance appraisal session, time is set aside to: 1) Restate expectations about job responsibilities and performance standards; 2) Evaluate job performance against previous expectations; and 3) Discuss future development opportunities and relate them to organizational needs.

In evaluating an employee's performance, you are to identify strengths and areas of performance which require improvement. You are asked to provide examples of the employee's performance to illustrate the ratings you give. Examples based on your own observations work best. However, second-hand observations are permissible if you have verified the information. Such examples clarify your message.

Each Competency is composed of two segments: Type.Name and has behavioral factors. Consider each of the behavioral factors when selecting the rating for the Competency. Examples that support the rating can be provided by clicking the *Update Details* icon and entering them in the *Comments* box.

Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure	3-Successful		
Core.Decision Making	3-Successful		
Core.Initiating Action	3-Successful		
Core.Interpersonal Communication	2-Needs Development		
Core.Job Knowledge/Functional and Technical Skills	3-Successful		
Core.Organizing and Planning	4-Above Expectations		
Core.Quality of Work	3-Successful		
Core.Service Orientation	3-Successful		
Core.Work Habits			

11. The *Delete* button has been inactivated so it is not possible to delete a competency.

Supervisor (Main Appraiser): Appraises Performance

Rate Objective Results

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Rates Objective Results (optional)

The on-line performance appraisal tool has three main sections as follows:

- Competencies
- Objectives
- Questionnaire

This chapter focuses on the *Objectives* section.

If the *Objectives* section is not utilized for this employee, skip to the next chapter.

Steps:

1. Review the *Employee's Results Rating* from the self-appraisal.
2. Click the *Show* link to see the details of the objective.
3. Click the *Update Comments* icon to open the *Objective Details* page.



Objectives									
Add Objective									
Details	Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating	Duplicate	Update Comments	Delete
Show	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result				
Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result				
Show	Objective C	07-Nov-2015	11-Mar-2016						

4. Review the details of the objective.
5. Select the appropriate value from the drop down list in the *Results Rating* field.

Supervisor (Main Appraiser): Appraises Performance

Rate Objective Results

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Rates Objective Results (optional)

6. Enter examples or other information in the *Comments* box in support of the results rating.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review > Update Appraisal >

Update Objective Details

Click Add Objective to create objectives against which you measure performance.

Cancel Save as Draft Apply and Update Next Apply

* Indicates required field

* Objective Name Objective A Complete (%) 100 ⓘ

Created By Employee1, Chris Date Completed 18-Mar-2016 ⓘ

* Start Date 15-Sep-2015 ⓘ

Target Date 15-Mar-2016 ⓘ

Next Review Date ⓘ

Priority Medium ▾

Description

Detail Objective A is to modify the existing tasks and forms to provide a more efficient flow and faster completion of this work.

Success Criteria Realize a 10% improvement in effort and improved performance

Comments Project work is completed.

Rate Appraisee On This Objective

Results Rating 2-Achieved Result ⓘ Hide

Comments Confirmed that the project is complete and that a 10% improvement in performance has been achieved.

Step Value	Rating Scale	Behavioral Indicator
1	Did Not Achieve Result	
2	Achieved Result	
3	Achieved More Than Expected Result	

Supervisor (Main Appraiser): Appraises Performance

Rate Objective Results

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Rates Objective Results (optional)

- Click the *Apply and Update Next* button to rate the next objective. Alternatively, click the *Apply* button to return to the *Update Appraisal* page or click the *Save as Draft* button to save the work for later.

Objectives									
Add Objective									
Details	Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating	Duplicate	Update Comments	Delete
Show	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	2-Achieved Result			
Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	2-Achieved Result			
Show	Objective C	07-Nov-2015	11-Mar-2016			3-Achieved More Than Expected Result			

- Objectives that were not completed will be automatically moved to the next performance year as long as the *Date Completed* field is blank.
- To prevent an incomplete objective from automatically transferring to the next performance year, enter 30-JUN-XX (the current year) in the *Date Completed* field and enter comments in the *Comments* box.
- When the appraisal form is complete or to save the work to complete at a later date, click the *Save as Draft* button.

NOTE: The on-line appraisal MUST NOT be forwarded to the employee until after the supervisor has met and reviewed the employee's performance face-to-face.

Supervisor (Main Appraiser): Appraises Performance

Summarize Participant Input and Give Final Rating

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Summarize Participant Input and Give Final Rating (optional)

There are two remaining steps to complete the performance appraisal. The first is to summarize feedback from any additional participants and the second is to select an overall performance rating and supporting comments.

Steps:

1. Summarize comments from additional participants in the *Comments* box in the *Feedback* section.
NOTE: The supervisor can control whether or not the employee sees the feedback comments. Instructions can be found in the 'Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee' chapter.

Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments

Received input from Chris' prior supervisor who gave an overall rating of 'Satisfactory' citing that Chris consistently performed all of the job requirements in a professional and competent manner. Also received input from the project manager on the TVM project last year stating that Chris made significant contributions to the project and got along well with the rest of the team. Chris met all of the established deadlines and the PM stated that he would welcome working with Chris on another project.

2. Select the appropriate value from the drop-down box in the *Overall Rating* field.
3. Enter supporting comments in the *Overall Comments* box.

Overall Rating and Comments

Overall Rating

3-Successful

Overall Comments

Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Christ during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification.

Chris has become a valuable member of the team.

4. Click the *Apply* button to save the appraisal.

Supervisor (Main Appraiser): Appraises Performance

Summarize Participant Input and Give Final Rating

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Appraises Performance
Task	Summarize Participant Input and Give Final Rating (optional)

A completed appraisal:

ORACLE PHR Performance Management - Supervisor

Update Appraisal

Cancel Save as Draft Apply

Employee Name: Employee1, Chris
 Organization Email Address: khrd@cfp.pitt.edu
 Employee Number: 166670
 Department: Financial Information Systems
 Manager: Supervisor1, Pat
 Job: Staff.Administrator.III

Competencies

This performance appraisal process is designed to evaluate an employee's performance over a specified period of time. When the process works well, the employee and his/her supervisor plan together to build on strengths and develop those areas needing improvement. During the performance appraisal session, time is set aside to: 1) Restate expectations about job responsibilities and performance standards; 2) Evaluate job performance against previous expectations; and 3) Discuss future development opportunities and relate them to organizational needs.

In evaluating an employee's performance, you are to identify strengths and areas of performance which require improvement. You are asked to provide examples of the employee's performance to illustrate the ratings you give. Examples based on your own observations work best. However, second-hand observations are permissible if you have verified the information. Such examples clarify your message.

Each Competency is composed of two segments: Type.Name and has behavioral factors. Consider each of the behavioral factors when selecting the rating for the Competency. Examples that support the rating can be provided by clicking the *Update Details* icon and entering them in the *Comments* box.

Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure (j)	3-Successful (j)		
Core.Decision Making (j)	3-Successful (j)		
Core.Initiating Action (j)	3-Successful (j)		
Core.Interpersonal Communication (j)	2-Needs Development (j)		
Core.Job Knowledge/Functional and Technical Skills (j)	3-Successful (j)		
Core.Organizing and Planning (j)	4-Above Expectations (j)		
Core.Quality of Work (j)	3-Successful (j)		
Core.Service Orientation (j)	3-Successful (j)		
Core.Work Habits (j)	(j)		

Objectives

Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating	Duplicate	Update Comments	Delete
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	2-Achieved Result			
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	2-Achieved Result			
Objective C	07-Nov-2015	11-Mar-2016			3-Achieved More Than Expected Result			

Questionnaire: Employee

Questionnaire Name: Self-Appraisal v2
 Last Submitted On: 23-Mar-2016

[Show Questionnaire](#)

Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments: Received input from Chris' prior supervisor who gave an overall rating of 'Satisfactory' citing that Chris consistently performed all of the job requirements in a professional and competent manner. Also received input from the project manager on the IV08 project last year stating that Chris made significant contributions to the project and got along well with the rest of the team. Chris met all of the established deadlines and the PM stated that he would welcome working with Chris on another project.

Overall Rating and Comments

Overall Rating: 3-Successful

Overall Comments: Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most of the job requirements. There have been a few issues with written communications but I will be working with Chris during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification.

Chris has become a valuable member of the team.

Cancel Save as Draft Apply

Home Logout Preferences Help
 Copyright (c) 2009, Oracle. All rights reserved.

Supervisor (Main Appraiser): Meets with Appraisee to Review Appraisal

Meet with Employee to Review Performance and Performance Appraisal

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Meets w/Appraisee to Review Appraisal
Task	Meet with the Employee to Review Performance and Review Appraisal Form (required)

All employees are entitled to have a face-to-face discussion about their performance with their supervisor. Once the on-line appraisal is complete the supervisor should schedule such a meeting. During the course of the appraisal meeting the performance appraisal should be discussed by either projecting it on a monitor or by printing a copy as a reference. Since the University has a green initiative, projecting the form on a monitor is preferable.

It is not necessary to have the supervisor or employee sign a printed copy of the appraisal and a paper copy is not required in the employee's file. After it is completed, the on-line appraisal will continue to be accessible to both the employee and the current supervisor.

The on-line appraisal must not be shared with the employee until after the face-to-face performance review has been completed.

Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee

Transfer Ownership of the Appraisal to the Employee for Review and Feedback

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Shares On-Line Appraisal w/Appraisee
Task	Transfer Ownership of the Appraisal to the Employee for Review & Feedback (required)

Once the face-to-face performance review has been completed, the supervisor must then share the on-line performance appraisal with the employee.

Steps:

1. Follow the steps outlined in the previous chapters to navigate to the *Performance Management Dashboard*; select the current appraisal task; select the employee and open the *Supervisor Review* page.

The screenshot displays the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". A "Supervisor Review" link is circled in purple. Below the navigation bar are three buttons: "Share with Employee", "Update Appraisal", and "Submit for Approval".

Employee Information:

- Employee Name: Employee1, Chris
- Organization Email Address: kbird@cfo.pitt.edu
- Manager: Supervisor1, Pat
- Employee Number: 166670
- Department: Financial Information Systems
- Job: Staff.Administrator.III

Setup Details:

- Initiator: Employee1, Chris
- Appraisal Purpose Status: Appraisal-Non-Supervisory Role v3
- Supervisor: Supervisor1, Pat
- Appraisal Date: 21-Mar-2016
- Next Appraisal Date: [Blank]

Overall Rating and Comments:

- Overall Rating
- Overall Comments
- Employee Feedback

Manage Participants:

Buttons: Select Participant, Request Feedback, Prevent Feedback, Add Participant

Links: Select All, Select None

Select Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
<input type="checkbox"/> Bird, Karen	Appraiser		Completed	23-Mar-2016	23-Mar-2016			
<input type="checkbox"/> Employee12, Anthony	Reviewer		Open	23-Mar-2016				

Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee

Transfer Ownership of the Appraisal to the Employee for Review and Feedback

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Shares On-Line Appraisal w/Appraisee
Task	Transfer Ownership of the Appraisal to the Employee for Review & Feedback (required)

- Click the *Share with Employee* button to transfer the appraisal to the employee.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review

Share with Employee Update Appraisal Submit for Approval

Employee Name: Employee1, Chris
 Organization Email Address: kbird@cfo.pitt.edu
 Manager: Supervisor1, Pat

Employee Number: 166670
 Department: Financial Information Systems
 Job: Staff.Administrator.III

- On the *Share Appraisal Details with Employee* page, ensure that the first four boxes at the top of the page are checked. This is necessary to allow the employee to see the Competency and Objective ratings and comments. If the boxes are not checked, then click each one to check it.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review >

Share Appraisal Details with Appraisee

Cancel Submit

Details to be Shared with Employee

Select appraisal components completed by the supervisor (main appraiser) to share with the employee (appraisee).

Competency Ratings and Comments Overall Rating
 Objective Ratings and Comments Overall Comments

Appraisal Ownership

Select Supervisor Retains Ownership to continue updating the appraisal.

Supervisor Retains Ownership

Employee Permissions

- To allow the employee to provide feedback, check the *Provide Feedback on Overall Rating* box. This is a required step as the employee's feedback replaces the employee's signature acknowledging receipt of the appraisal.

Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee

Transfer Ownership of the Appraisal to the Employee for Review and Feedback

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Shares On-Line Appraisal w/Appraisee
Task	Transfer Ownership of the Appraisal to the Employee for Review & Feedback (required)

5. DO NOT check the *Update Appraisal* box at this point as this will allow the employee to change the data entered by the supervisor.

ORACLE[®] PHR Performance Management - Supervisor

Supervisor Review >

Share Appraisal Details with Appraisee

Cancel Submit

Details to be Shared with Employee

Select appraisal components completed by the supervisor (main appraiser) to share with the employee (appraisee).

Competency Ratings and Comments Overall Rating

Objective Ratings and Comments Overall Comments

Appraisal Ownership

Select Supervisor Retains Ownership to continue updating the appraisal.

Supervisor Retains Ownership

Employee Permissions

Indicate whether the employee (appraisee) can update the appraisal, provide feedback on the overall rating, and view and add participant names.

Update Appraisal Participant Details

Provide Feedback on Overall Rating
Select only if you also select Overall Rating

Notification Message to Employee

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

6. If the appraisal included additional participants and you would like the employee to see the additional participant's names, then check the *Participant Details* box.

Supervisor (Main Appraiser): Shares On-Line Appraisal w/Appraisee

Transfer Ownership of the Appraisal to the Employee for Review and Feedback

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Shares On-Line Appraisal w/Appraisee
Task	Transfer Ownership of the Appraisal to the Employee for Review & Feedback (required)

- In the *Notification Message to Employee* box, enter a message to the employee requesting that they review the appraisal and provide feedback acknowledging receipt. The employee can also include any additional information they would like to become a permanent part of the performance appraisal.

Notification Message to Employee

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

Chris,
As we discussed, please review this year's performance appraisal and provide feedback confirming that you have received it. Also, feel free to include any additional information that you would like to become a permanent part of the appraisal. Thank you.
Pat

- Click the *Submit* button to transfer the appraisal to the employee and return to the *Main Appraiser* page.
- There will be a confirmation that the appraisal has been transferred to the Employee. The *Appraise* icon will now be gray.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser Selected Plan Is Fiscal 2016 Non-Supervis

Confirmation
The appraisal has been transferred to the employee (appraisee)

Appraisals as Supervisor

Appraisals In Progress

Employee	Appraisal Date	Status	Appraisal Details	Print	Appraise
Employee1, Chris	21-Mar-2016	Transferred to Employee			

Info Online

Topics

Employee: Completes Self Appraisal

Review On-Line Appraisal

Swim Lane	Employee (Appraisee)
Flow Block	Reviews On-Line Appraisal
Task	Employee Reviews On-Line Appraisal (required)

When the supervisor transfers the performance appraisal back to the employee, the employee will receive an email message and a workflow notification that the appraisal has been returned to them. The employee must review the appraisal and has the option to print a hard copy. It is not necessary to print the appraisal because the employee will always have access to it on the *Appraisals* tab.

The Employee:

1. Logs in to PRISM and selects the *PHR Performance Management – Employee* responsibility to access the *Employee Dashboard*.
2. Selects the *Go To Task* icon on the active *Task* to open the *My Appraisals* page.
3. Clicks the *View Appraisals Detail/Give Feedback* icon.

The screenshot shows the Oracle PHR Performance Management - Employee interface. The top navigation bar includes 'Appraisals' and 'Performance Management' tabs. Below the navigation, there's a section for 'My Appraisals' with a sub-tab for 'Participant'. The main content area displays 'Appraisals of Employee1, Chris' with a table containing one appraisal record. The 'View Appraisal Details/Give Feedback' link in the table is circled in purple. Below the table is a 'Completed Appraisals' section with search filters and a table that currently shows 'No results found.'

Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View Appraisal Details/Give Feedback	Update
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Transferred to Employee		

Employee (Appraisee): Reviews On-Line Appraisal

Review On-Line Appraisal

Swim Lane	Employee (Appraisee)
Flow Block	Reviews On-Line Appraisal
Task	Employee Reviews On-Line Appraisal (required)

4. Reviews the details of the completed appraisal.

ORACLE[®]PHR Performance Management - Employee

[Home](#) [Logout](#) [Preferences](#) [Help](#)

Navigator Favorites

Details: Employee

[Back](#)
[Share with Supervisor](#)
[Printable Page](#)

Employee Name Employee1, Chris Organization Email Address kbird@cfo.pitt.edu Manager Supervisor1, Pat	Employee Number 166670 Department Financial Information Systems Job Staff.Administrator.III
---	--

Overall Rating and Comments

Overall Rating	3-Successful
Overall Comments	Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Christ during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification. Chris has become a valuable member of the team.

Employee Feedback

Competencies

[Show All Details](#) | [Hide All Details](#)

Competency	Supervisor Performance Rating
Core.Composure	3-Successful
Core.Decision Making	3-Successful
Core.Initiating Action	3-Successful
Core.Interpersonal Communication	2-Needs Development
Core.Job Knowledge/Functional and Technical Skills	3-Successful
Core.Organizing and Planning	4-Above Expectations
Core.Quality of Work	3-Successful
Core.Service Orientation	3-Successful
Core.Work Habits	

Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Supervisor Results Rating
Show	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	2-Achieved Result
Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	2-Achieved Result
Show	Objective C	07-Nov-2015	11-Mar-2016			3-Achieved More Than Expected Result

Questionnaire: Employee

Questionnaire Name Self-Appraisal v2	Last Submitted On 23-Mar-2016
---	--------------------------------------

[Show Questionnaire](#)

[Back](#)
[Share with Supervisor](#)
[Printable Page](#)

Home Logout Preferences Help

Copyright (c) 2006, Oracle. All rights reserved.

Employee (Appraisee): Reviews On-Line Appraisal

Review On-Line Appraisal

Swim Lane	Employee (Appraisee)
Flow Block	Reviews On-Line Appraisal
Task	Employee Reviews On-Line Appraisal (required)

- Can click the *Printable Page* button to print a copy of the performance appraisal, however printing from the *Print* icon on the *My Appraisals* page produces a better result. Please refer to the chapter on Printing for more information.

The screenshot shows the Oracle PHR Performance Management interface for an employee appraisal. The page title is "ORACLE PHR Performance Management - Employee". The breadcrumb trail is "Details: Employee". There are navigation buttons for "Back", "Share with Supervisor", and "Printable Page" (circled in red). The employee information is as follows:

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

The "Overall Rating and Comments" section shows an overall rating of "3-Successful". The overall comments are: "Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Chris during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification." Below this, it states "Chris has become a valuable member of the team." and "Employee Feedback".

The "Competencies" section shows a table with the following data:

Competency	Supervisor Performance Rating
Core.Composure	3-Successful
Core.Decision Making	3-Successful
Core.Initiating Action	3-Successful
Core.Interpersonal Communication	2-Needs Development
Core.Job Knowledge/Functional and Technical Skills	3-Successful
Core.Organizing and Planning	4-Above Expectations
Core.Quality of Work	3-Successful

Employee (Appraisee): Provides Feedback to Appraiser

Provide Feedback to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Provides Feedback to Appraiser
Task	Employee Provides Feedback to Supervisor (required)

After reviewing the completed performance appraisal, the employee must transfer the appraisal back to the supervisor with feedback confirming that they received and reviewed the completed appraisal. The employee can also include any additional information/comments they would like to become a permanent part of the appraisal.

The Employee:

1. Clicks the *Share with Supervisor* button on the *Appraisal Details* page. (See the previous chapter for instructions on navigating to the *Appraisal Details* page.)

The screenshot shows the Oracle PHR Performance Management interface for an employee. The page title is "ORACLE PHR Performance Management - Employee". The breadcrumb trail is "Details: Employee". There are navigation links for "Home", "Logout", "Preferences", and "Help". A "Navigator" and "Favorites" menu are also visible. The main content area displays employee details for "Employee1, Chris" (Employee Number: 100070, Department: Financial Information Systems, Job: Staff.Administrator.III). The manager is "Supervisor1, Pat". The "Share with Supervisor" button is highlighted with a purple circle. Below this, the "Overall Rating and Comments" section shows an overall rating of "3-Successful" and a comment: "Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Chris during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification. Chris has become a valuable member of the team." The "Competencies" section shows a table with columns for "Competency" and "Supervisor Performance Rating".

Competency	Supervisor Performance Rating
Core.Composure	3-Successful
Core.Decision Making	3-Successful
Core.Initiating Action	3-Successful
Core.Interpersonal Communication	2-Needs Development
Core.Job Knowledge/Functional and Technical Skills	3-Successful
Core.Organizing and Planning	4-Above Expectations

2. Enters acknowledgement of the appraisal and any additional comment into the *Feedback on Overall Rating* box.

Employee (Appraisee): Provides Feedback to Appraiser

Provide Feedback to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Provides Feedback to Appraiser
Task	Employee Provides Feedback to Supervisor (required)

3. Can also enter a message to their supervisor in the *Notification Message for Supervisor* box.

NOTE: Only the text in the *Feedback on Overall Rating* box will be saved in the finalized appraisal. Any message in the *Notification Message for Supervisor* box is only included in the email and workflow notifications to the supervisor.

ORACLE[®] PHR Performance Management - Employee

Home Navigator Favorites Home Logout Preferences Help

Details: Employee >

Share Appraisal Details with Supervisor

Click Submit to transfer ownership of this appraisal to your supervisor.

Cancel Submit

Feedback on Overall Rating

Hi Pat,
I have received and reviewed this year's performance appraisal. I don't have anything to add.
Thanks,
Chris

This field is disabled if the supervisor (main appraiser) does not require your feedback at this time.

Notification Message for Supervisor

4. Clicks the *Submit* button.

Employee (Appraisee): Provides Feedback to Appraiser

Provide Feedback to Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Provides Feedback to Appraiser
Task	Employee Provides Feedback to Supervisor (required)

- The employee will be returned to the *My Appraisals* page where there will be a message confirming that the appraisal has been transferred to the supervisor.

The screenshot shows the Oracle PHR Performance Management - Employee interface. At the top, there is a navigation bar with 'Appraisals' and 'Performance Management' tabs. Below this, a confirmation message states: 'Ownership of your appraisal has transferred to your supervisor (main appraiser). You cannot update the appraisal again until your supervisor (main appraiser) returns ownership of the appraisal to you and requests your input.' Below the message is a table titled 'Appraisals of Employee1, Chris' with columns: Initiator, Appraisal Date, Supervisor, Appraisal Purpose, Status, View Appraisal Details/Give Feedback, and Update Print Self-Appraisal. The table contains one row for an appraisal initiated by 'Employee1, Chris' on '21-Mar-2016' by 'Supervisor1, Pat', with a status of 'Ongoing with Supervisor'. Below the table is a section for 'Completed Appraisals'.

- Logs out.
- At this point, the employee's work on the performance appraisal is complete.

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

Supervisors will receive email and workflow notifications informing them that the employee has transferred the completed appraisal back to them. After reviewing the employee's feedback, the supervisor must submit the completed appraisal to their supervisor for review and approval.

Steps:

1. Follow the steps in prior chapters to navigate to the *Main Appraiser* tab.
2. Click the *Appraise* icon for the employee whose appraisal is to be finalized.

ORACLE PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser Selected Plan Is Fiscal 2016 Non-Supervisor

Appraisals as Supervisor

Appraisals In Progress

Employee	Appraisal Date	Status	Appraisal Details	Print	Appraise
Employee1, Chris	21-Mar-2016	Ongoing with Supervisor			

Info Online

Topics

[Performance Management Appraiser Instructions](#)
[Performance Management FAQ](#)

Current Workers

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Employee

Last Name, Title, First Name

Appraisal Date

(example: 26-Mar-2016)

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

- Review the comments in the *Feedback* box.

The screenshot displays the Oracle PHR Performance Management - Supervisor interface. At the top, there is a navigation bar with a home icon, 'Navigator', 'Favorites', and links for 'Home', 'Logout', 'Preferences', and 'Help'. Below this is the 'Supervisor Review' section, which includes three buttons: 'Share with Employee', 'Update Appraisal', and 'Submit for Approval'. The main content area shows employee details for 'Employee1, Chris' (Employee Number: 166670, Department: Financial Information Systems, Job: Staff.Administrator.III) and their manager 'Supervisor1, Pat'. A 'Setup Details' section shows the appraisal was initiated by 'Employee1, Chris' on '21-Mar-2016' using the 'Appraisal-Non-Supervisory Role v3' template. The 'Overall Rating and Comments' section shows an overall rating of '3-Successful' and a comment from the supervisor: 'Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Christ during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification. Chris has become a valuable member of the team.' Below this is the 'Employee Feedback' section, which contains a message from Chris: 'Hi Pat, I have received and reviewed this year's performance appraisal. I don't have anything to add. Thanks, Chris'.

- If necessary, the appraisal can be sent back to the employee. For example, if the employee did not include any feedback. Click the *Share with Employee* button and follow the instructions in in the 'Share On-Line Appraisal with Employee' chapter.
- If the feedback is sufficient, click the *Submit for Approval* button to forward the appraisal for approval.
NOTE: The appraisal will be forwarded to the Supervisor's Supervisor for approval.
- The *Give Final Ratings: Supervisor* page shows a summary of the performance appraisal.

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

- Be sure to scroll to the bottom of the page and ensure that the *Provide Feedback on Overall Rating* box is **UNCHECKED** (not checked).

ORACLE PHR Performance Management - Supervisor

Give Final Ratings: Supervisor

Employee Name: Employee1, Chris
Organization Email Address: chris@co.pitt.edu
Manager: Supervisor1, Pat

Employee Number: 166670
Department: Financial Information Systems
Job: Staff Administrator.111

Competency Ratings

Objective Ratings

Details Objective Name	Start Date	Target Date	Date Completed	Comments
Objective A	15-Sep-2015	15-Mar-2016	20-Mar-2016	Work was actually completed on 12-Mar-16 but was not able to obtain sign-off until the 20th.
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	
Objective C	07-Nov-2015	11-Mar-2016		

Overall Rating and Comments

Overall Rating: [Dropdown]

Overall Comments: [Text Area]

Employee Feedback

Details to be Shared with Employee

Employee Feedback

Provide Feedback on Overall Rating

- If the *Provide Feedback on Overall Rating* box is checked, uncheck it. The *Additional Details* box should also be unchecked.

Details to be Shared with Employee

Select appraisal components to share with the appraisee when the appraisal is complete.

Additional Details

Participant Names

Participant Ratings

Overall Rating

Overall Comments

Participant Comments

Employee Feedback

Select to request the appraisee's feedback on their overall rating when the appraisal is complete.

Provide Feedback on Overall Rating

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

9. Click the *Continue* button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. At the top, there is a navigation bar with 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below this, the page title is 'Supervisor Review >' and the main heading is 'Give Final Ratings: Supervisor'. There are three buttons: 'Cancel', 'Save as Draft', and 'Continue' (circled in red). The employee information is displayed as follows:

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Below the employee information is the 'Competency Ratings' section. It includes a 'Show All Details' link and a 'Hide All Details' link. The table below shows the competency ratings:

Details	Competency	Score
Show	Core.Composure	3
Show	Core.Decision Making	3
Show	Core.Initiating Action	3
Show	Core.Interpersonal Communication	3
Show	Core.Job Knowledge/Functional and Technical Skills	3.5
Show	Core.Organizing and Planning	3.5
Show	Core.Quality of Work	3
Show	Core.Service Orientation	3
Show	Core.Work Habits	3

Below the competency ratings is the 'Objective Ratings' section.

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

10. The *Give Final Ratings: Review Page* has a *Printable Page* button which allows the supervisor to print the performance appraisal.

NOTE: The *Print* icon on the *Main Appraiser* page gives a better printout than the *Printable Page* button. Refer to the chapter on Printing for more information.

ORACLE PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review > Give Final Ratings: Supervisor >

Give Final Ratings: Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name: **Employee1, Chris**
 Organization Email Address: kbird@cfo.pitt.edu
 Manager: **Supervisor1, Pat**

Employee Number: **166670**
 Department: **Financial Information Systems**
 Job: **Staff.Administrator.III**

Competency Ratings

[Show All Details](#) | [Hide All Details](#)

Details	Competency	Score
Show	Core.Composure	3
Show	Core.Decision Making	3
Show	Core.Initiating Action	3
Show	Core.Interpersonal Communication	3
Show	Core.Job Knowledge/Functional and Technical Skills	3.5
Show	Core.Organizing and Planning	3.5
Show	Core.Quality of Work	3
Show	Core.Service Orientation	3
Show	Core.Work Habits	3

Objectives

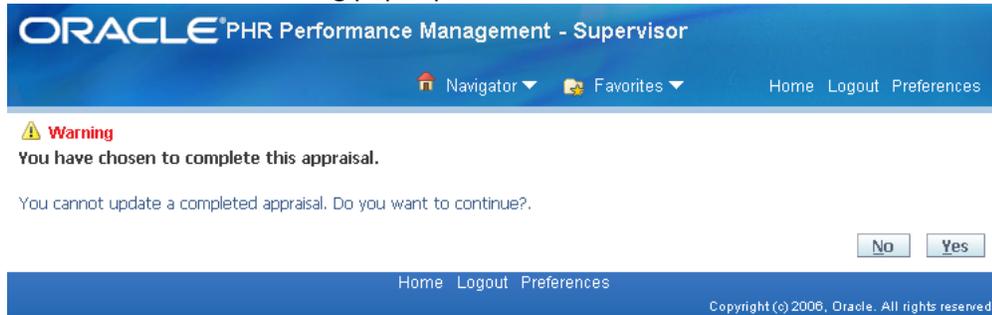
11. Click the *Submit* button to continue.

Supervisor (Main Appraiser): Reviews Feedback & Submits Appraisal for Approval

Review Feedback and Submit Appraisal for Approval

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	Reviews Employee's Feedback and Submits Appraisal for Approval (required)

12. When the submittal warning pops up, click the Yes button to continue.



13. On the *Main Appraiser* page, the status of the appraisal has changed to 'Pending Approval' and the *Appraise* icon is grayed out.
14. At this point the supervisor's work on the performance appraisal is complete unless their supervisor rejects the appraisal.
15. The system sends the supervisor's supervisor email and workflow notifications notifying them that the appraisal has been submitted to them for approval.

Supervisor's Supervisor (Approver): Approves Appraisal

Review and Approve Appraisal

Swim Lane	Supervisor's Supervisor (Approver)
Flow Block	Approves Appraisal
Task	Reviews Performance Appraisal and Approves Appraisal (required)

The Supervisor's Supervisor will receive workflow and email notifications that the performance appraisal has been submitted for approval.

The Supervisor's Supervisor:

1. Opens the email notification.

PRISM Workflow ... Action Required: Appraisal for Employee1, Chris (proposed by Supervisor1, Pat)
From Supervisor1, Pat To Approver1, Sam

2. Clicks the *Please click here to Respond* link at the bottom left corner of the email.

Action History		
Sequence	Name	Action
1	Supervisor1, Pat	Submit
2	Approver1, Sam	Pending

Related Applications

- [View Action](#)
- [Return For Correction](#)

[Please click here to Respond](#)

3. If prompted, logs in with University account user name and password.
4. Reviews the performance appraisal.
5. Alternatively, logs in to PRISM and clicks on the workflow notification to review the performance appraisal.

Supervisor's Supervisor (Approver): Approves Appraisal

Review and Approve Appraisal

ORACLE

[Navigator](#)
[Favorites](#)
[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)

Appraisal for Employee1, Chris (proposed by Supervisor1, Pat)

From: Supervisor1, Pat
 To: Approver1, Sam
 Sent: 26-Mar-2016 18:00:20
 Due: 26-Mar-2017 18:00:20
 ID: 14350763

Attachments

Overall Rating and Comments

Overall Rating: 3-Successful

Overall Comments: Based on the comments from Chris' prior supervisor and also on my observations during the last six months, Chris is successfully completing most the job requirements. There have been a few issues with written communications but I will be working with Chris during the upcoming performance year to remedy those and will see about getting Chris started on PMP certification.

Chris has become a valuable member of the team.

Appraisee Feedback: Hi Pat,
I have received and reviewed this year's performance appraisal. I don't have anything to add.
Thanks,
Chris

Advancement Potential

Readiness Level
 Retention Level
 Short-Term Work Opportunity
 Long-Term Work Opportunity
 Potential Details

Details Shared with Appraisee

Additional Details [?](#)
 Participant Names
 Participant Ratings
 Overall Rating
 Overall Comments
 Participant Comments

Appraisee Feedback

Provide Feedback on Overall Rating

Competency Ratings

Competency	Current Proficiency Level	New Proficiency Level	Score
Core.Composure			3
Core.Decision Making			3
Core.Initiating Action			3
Core.Interpersonal Communication			3
Core.Job Knowledge/Functional and Technical Skills			3.5
Core.Organizing and Planning			3.5
Core.Quality of Work			3
Core.Service Orientation			3
Core.Work Habits			3

Objectives

Objective Name	Start Date	Target Date	Achievement Date	Comments	Score
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	Project work is completed.	2
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	Metrics show a 10% improvement in effort and performance.	2
Objective C	07-Nov-2015	11-Mar-2016			3

Participants

Full Name	Participation Type	Questionnaire Name	Last Notified Date	Date Completed
Brd, Karen	Appraiser		23-Mar-2016	23-Mar-2016
Employee12, Anthony	Reviewer		23-Mar-2016	

Action History

Sequence	Name	Action	Date	Notes
1	Supervisor1, Pat	Submit	22-Mar-2016 15:15:46	
2	Approver1, Sam	Pending		

Related Applications

[View Action](#)
[Return For Correction](#)

Response

Note:

[Return to Worklist](#)

[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)

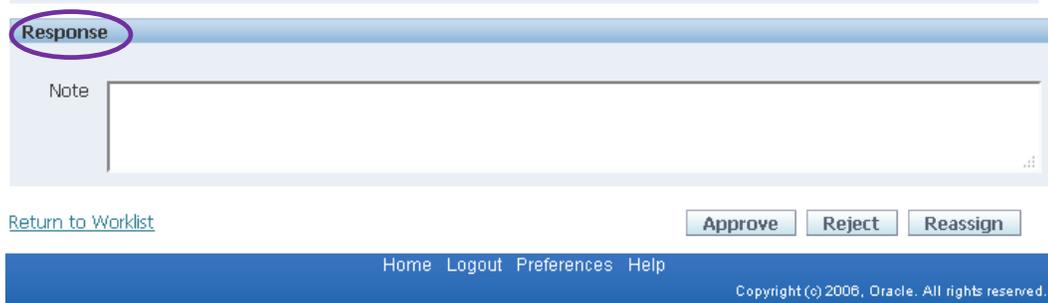
Copyright (c) 2006, Oracle. All rights reserved.

Supervisor's Supervisor (Approver): Approves Appraisal

Review and Approve Appraisal

Swim Lane	Supervisor's Supervisor (Approver)
Flow Block	Approves Appraisal
Task	Reviews Performance Appraisal and Approves Appraisal (required)

6. If desired, enters a message in the *Note* box in the *Response* section.



7. Clicks the *Approve* button to approve and finish the performance appraisal. Alternatively, clicks the *Reject* button to send the appraisal back to the supervisor for additional work.
8. If the appraisal should be approved by someone other than the supervisor's supervisor, clicks the *Reassign* button to send the appraisal to the person who should approve it.



9. Once the appraisal is approved, the Performance Management process is complete and no further work can be done on the appraisal.

Supervisor (Main Appraiser): Views Approved Performance Appraisals

Review Approved Appraisals

Swim Lane	N/A
Flow Block	N/A
Task	Supervisor Views Approved Performance Appraisals (optional)

Once a performance appraisal has been approved, it can no longer be viewed under the *Appraisals in Progress* section of the *Main Appraiser's* page. Instead it can be found in the *Completed Appraisals* section at the bottom of the page.

Steps:

1. Log in to PRISM and select the *PHR Performance Management – Supervisor* responsibility and select *Performance Management* to access the *Supervisor Dashboard*.
2. Click the *Go To Task* icon to open the *Main Appraiser* page.

3. Scroll to the bottom of the page to the *Completed Appraisals* section.

Supervisor (Main Appraiser): Views Approved Performance Appraisals

Review Approved Appraisals

Swim Lane	N/A
Flow Block	N/A
Task	Supervisor Views Approved Performance Appraisals (optional)

- Find the employee's name in the list and click the *Details* icon to view the completed appraisal.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Appraisals" and "Performance Management" tabs, and "Main Appraiser" is selected. The "Selected Plan Is" is "Fiscal 2016 Non-Supervisor".

The "Appraisals as Supervisor" section is active. Under "Appraisals In Progress", there is a table with columns: Employee, Appraisal Date, Status, Appraisal Details, Print, and Appraise. The message "No results found." is displayed.

The "Info Online" section contains links for "Performance Management Appraiser Instructions" and "Performance Management FAQ".

The "Current Workers" section is visible.

The "Completed Appraisals" section includes a filter: "Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose." The filter fields are:

- Employee: Last Name, Title, First Name
- Appraisal Date: (example: 27-Mar-2016)

 There are "Go" and "Clear" buttons.

The table below shows the list of completed appraisals. The "Details" icon for the first appraisal is circled in purple.

Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016				

Supervisor (Main Appraiser): Views Approved Performance Appraisals

Review Approved Appraisals

Swim Lane	N/A
Flow Block	N/A
Task	Supervisor Views Approved Performance Appraisals (optional)

- If the list of employees is very long, enter the employee's name in the *Employee field* and click the *Go* button to search for the employee. The search can be further narrowed by entering a date in the *Appraisal Date* field.

NOTE: The appraisal date is the start of the performance appraisal process – usually May first of the fiscal year being appraised.

Current Workers

Completed Appraisals

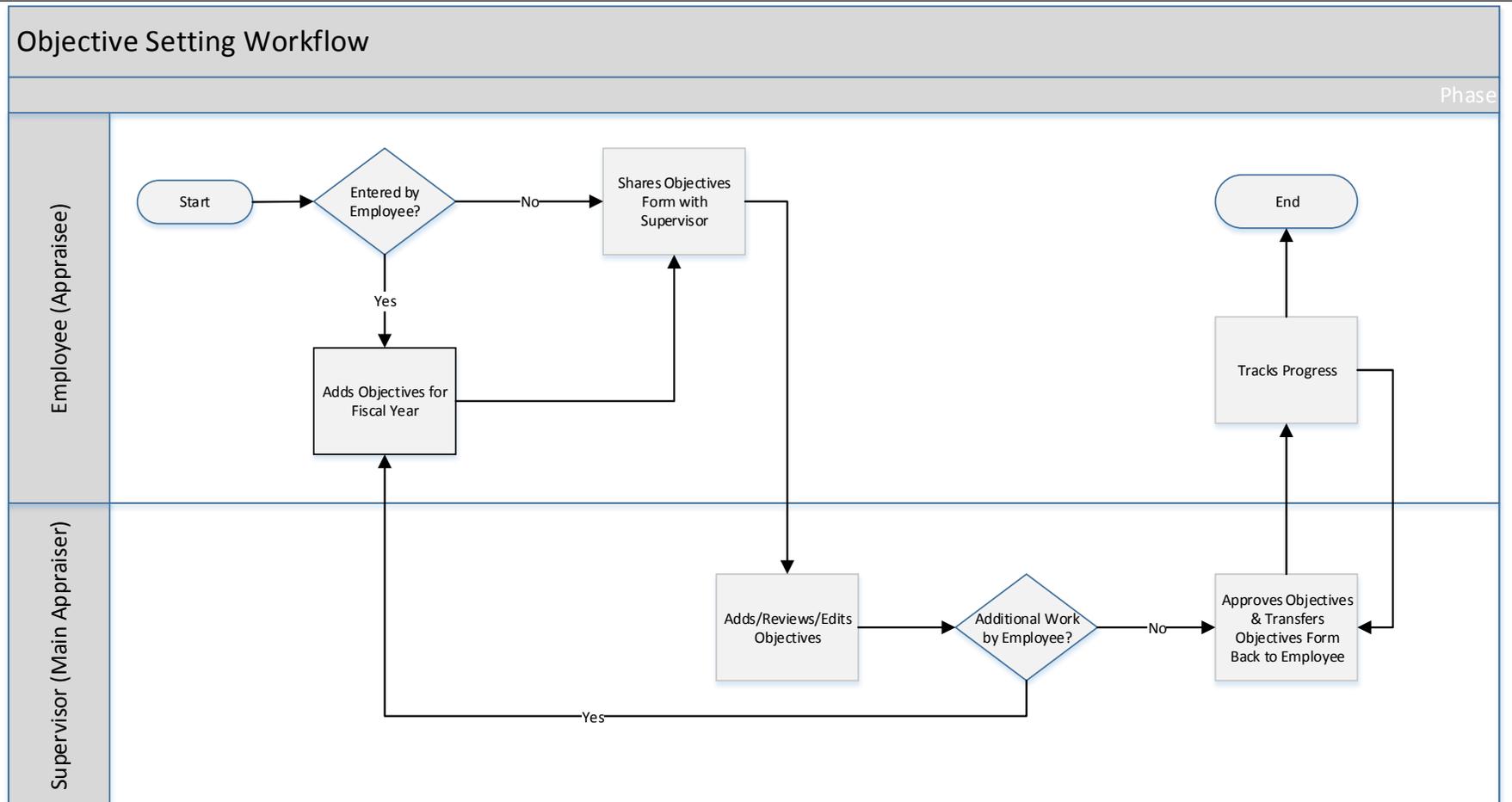
Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Employee

Appraisal Date

Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016	<input type="button" value="Details"/>	<input type="button" value="Print"/>	<input type="button" value="Delete"/>	

Objective Setting Process Flow Diagram



Objective Setting - General

General Information About Setting Objectives and the Objectives Form

Swim Lane	N/A
Flow Block	N/A
Task	N/A

Objective Setting and the Objectives Form

Setting, tracking and rating objectives during the performance appraisal year (July 1 – June 30) is an optional step in the Performance Appraisal process.

The on-line *Objectives* form can be used to record individual objectives at the start of and throughout each appraisal year. It can then be used at the end of the year to rate and describe the results of each objective. The *Objectives* form, updated with results and ratings, will become part of the self-appraisal form used in preparation for the annual performance appraisal.

The manner in which the *Objectives* form is used is determined by individual supervisors or by their management. Options for utilizing the *Objectives* form are:

- Objectives can be entered by the employee and then be reviewed and edited by the supervisor;
- Objectives can be entered by the supervisor and then be viewed but NOT edited by the employee
- Objectives entered by the employee can be updated to record progress by either the employee or the supervisor
- Objectives entered by the supervisor cannot be updated by the employee. However, the employee can send progress updates to the supervisor who can then update the objective.
- Objectives can be entered into the *Objectives* form at the beginning of the year and updated throughout the year;
- Objectives can be entered into the *Objectives* form at the beginning of the year and then not updated again until the end of the year;
- Objective setting can be skipped altogether;
- If objectives are not set at the beginning of or during the year, they can still be added to the performance appraisal and rated;
- If objectives are not set at the beginning of or during the year, they can still be added to the performance appraisal and NOT be rated;

Objective Setting - General

General Information About Setting Objectives and the Objectives Form

In summary, objective setting is optional and the *Objectives* form is a tool that can be used at the discretion of supervisors and their management in a way that best supports management needs.

Definition of an Objective

An objective is a result that is expected to be accomplished in the course of performing a job. Objectives ensure that both employees and Supervisors agree on the primary areas where efforts should be focused each year and the criteria with which success will be measured. Objectives should be written in conjunction with supervisory and, if applicable, departmental and/or divisional goals.

Employee: (Objectives) Entered by Employee - Yes

Navigate to the Objectives Form

Swim Lane	Employee (Appraisee)
Flow Block	Entered by Employee - Yes
Task	Employee Navigates to the Objectives Form (optional)

Objective setting is optional so if the *Objectives* form is not being used, no action is required.

However, if objectives are to be entered, some steps are required.

When the objective setting periods starts, the ownership of the *Objectives* form will be with the employee. This chapter provides instructions for entering objectives when they are to be entered by the employee. If objectives are to be entered by the supervisor, please skip to the next chapter.

The Employee:

1. Logs in to PRISM.
2. Selects the *PHR Performance Management – Employee* responsibility.
3. Selects the *Performance Management* menu item to access the *Employee Dashboard*.

4. On the *Employee Dashboard* finds the *Task* for the current year (the name changes each year).

Employee: (Objectives) Entered by Employee - Yes

Navigate to the Objectives Form

Swim Lane	Employee (Appraisee)
Flow Block	Entered by Employee - Yes
Task	Employee Navigates to the Objectives Form

5. Clicks the *Go To Task* icon.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Logged In As Employee1, Chris

On this page, you can access your development functions and view Performance management notification messages.

Performance Management Task List

Expand All Collapse All

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Fiscal 2017 Non-Supervisory Manage appraisal: Appraisal-Non-Supervisory Role v3	Appraisal	30-Mar-2016	30-Apr-2016	

Notifications Awaiting your Attention

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
No results found.							

Help

Plan	Attachments
Fiscal 2017 Non-Supervisory	

6. The *My Appraisals* page will open.
7. Clicks the *Update* icon.

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

My Appraisals Participant

Selected Plan Is Fiscal 2017 Non-Supervisor

Objectives

Appraisals of Employee1, Chris

Employee	Supervisor	Period Start Date	Status	Details	Print	Update
Employee1, Chris	Supervisor1, Pat	30-Mar-2016	Planned			

Completed Appraisals

Note that the search is case insensitive

Initiator

Appraisal Date (example: 30-Mar-2016)

Go Clear

Initiator	Appraisal Date	Period Start Date	Period End Date	Appraisal Purpose	Details	Print	Plan
No results found.							

Employee: Adds Objectives for the Fiscal Year

Add/Update Objectives for the Fiscal Year

Swim Lane	Employee (Appraisee)
Flow Block	Adds Objectives for the Fiscal Year
Task	Employee Enters Objectives for the New Appraisal Year (optional)

If there were any incomplete objectives from the prior appraisal year, they will automatically transfer over into the current year. In this case, the objectives will already be on the *Objectives* form when it is opened. If there weren't any incomplete objectives from the prior appraisal year or if objectives weren't entered into the on-line tool, then the *Objectives* form will be empty.

The instructions below also apply when an objective needs to be updated.

The Employee:

NOTE: Adding objectives into the on-line tool is optional. However, to add an objective, certain fields are required. Please see the notation after each step. In the on-line tool required fields are marked by an asterisk (*).

1. Clicks the *Add Objective* button. (required)

The screenshot shows the Oracle PHR Performance Management - Employee interface. At the top, there is a blue header with the Oracle logo and the text 'ORACLE PHR Performance Management - Employee'. Below the header, there are navigation links: 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. The main content area is divided into two tabs: 'Overview' (selected) and 'Review'. Below the tabs, there are several buttons: 'Cancel', 'Save as Draft', 'Share with Supervisor', and 'Continue'. The employee information is displayed: Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Manager: Supervisor1, Pat; Employee Number: 167842; Department: Financial Information Systems; Job: Staff.Administrator.III. Below the employee information, there is a section titled 'Objectives'. The 'Add Objective' button is circled in purple. Below the button, there is a table with the following columns: Objective Name, Start Date, Target Date, Date Completed, Duplicate, Update Details, and Quick Update. The table currently shows 'No results found.'

2. In the *Objective Name* field, enters a descriptive name for the objective. (required)
3. In the *Start Date* field, enters the date on which the objective is scheduled to start or the actual date if the work has already started. (required)
4. In the *Target Date* field, enters the date by which the objective should be completed. (optional)

Employee: Adds Objectives for the Fiscal Year

Add/Update Objectives for the Fiscal Year

Swim Lane	Employee (Appraisee)
Flow Block	Adds Objectives for the Fiscal Year
Task	Employee Enters Objectives for the New Appraisal Year (optional)

5. If this objective should be reviewed periodically, enters the next review date in the *Next Review Date* field. (optional) It is not necessary to enter a date for the annual performance appraisal review.
6. Selects the appropriate level from the drop down in the *Priority* field. (optional)
7. If any work has already been completed on the objective, enters an appropriate percent in the *Complete %* field. If the work has not started, enters 0% or leaves the field blank. (optional)
8. More detailed information about the objective can be entered into the *Detail* box. (optional)
9. Text detailing the criteria to measure the success of the objective can be entered into the *Success Criteria* box. (optional)

Employee: Adds Objectives for the Fiscal Year

Add/Update Objectives for the Fiscal Year

Swim Lane	Employee (Appraisee)
Flow Block	Adds Objectives for the Fiscal Year
Task	Employee Enters Objectives for the New Appraisal Year (optional)

10. Comments about the objective can be entered into the *Comments* box. (optional)

ORACLE[®] PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Overview Review

Add Objective

* Indicates required field

Cancel Save as Draft Apply and Add Another Apply

* Objective Name: Improve Work Flow Complete (%)

Created By: Employee1, Chris Date Completed

* Start Date: 01-Jul-2016

Target Date: 30-Nov-2016

Next Review Date

* Priority: High

Description

Detail: Modify the existing tasks and forms to provide a more efficient flow and faster completion of work.

Success Criteria: Realize a 10% improvement in effort and work completion.

Comments:

Employee: Adds Objectives for the Fiscal Year

Add/Update Objectives for the Fiscal Year

Swim Lane	Employee (Appraisee)
Flow Block	Adds Objectives for the Fiscal Year
Task	Employee Enters Objectives for the New Appraisal Year (optional)

11. Clicks the *Apply and Add Another* button to save the objective and enter another or alternatively, clicks the *Apply* button to save the objective and return to the objectives main page.

The screenshot displays the Oracle PHR Performance Management - Employee interface. At the top, there is a navigation bar with 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below this, there are tabs for 'Overview' and 'Review'. The main content area shows employee details for 'Employee1, Chris' (Employee Number: 167842, Department: Financial Information Systems, Job: Staff.Administrator.III). Below the details is the 'Objectives' section, which includes an 'Add Objective' button and a table of existing objectives.

Objective Name	Start Date	Target Date	Date Completed	Duplicate	Update Details	Quick Update
Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017				
Improve Work Flow	01-Jul-2016	30-Nov-2016				

12. Clicks the *Save as Draft* button to save work for later.

Employee: Shares Objectives Form with Supervisor

Share the Objectives Form with Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Objectives Form with Supervisor
Task	Employee Transfers Objectives Form to Their Supervisor (optional)

The steps in this chapter must be followed if:

- The employee has entered objectives for the performance year and their supervisor needs to review them; or
- The supervisor will be entering the objectives

In both cases, the ownership of the *Objectives* form must be transferred to the supervisor.

The Employee:

1. Clicks the *Share with Supervisor* button at the top of the main self-appraisal page.

The screenshot displays the Oracle PHR Performance Management - Employee interface. At the top, there is a blue header with the Oracle logo and the text 'PHR Performance Management - Employee'. Below the header, there are navigation links: 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. A progress bar shows 'Overview' as the current step and 'Review' as the next step. Below the progress bar, there are four buttons: 'Cancel', 'Save as Draft', 'Share with Supervisor' (circled in purple), and 'Continue'. The main content area displays employee information: Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Manager: Supervisor1, Pat; Employee Number: 167842; Department: Financial Information Systems; Job: Staff.Administrator.III. Below this information is a section titled 'Objectives' with an 'Add Objective' button. A table lists two objectives: 'Automate FRM-P2EYF' (Start Date: 01-Sep-2016, Target Date: 01-Apr-2017) and 'Improve Work Flow' (Start Date: 01-Jul-2016, Target Date: 30-Nov-2016). Each objective has columns for 'Duplicate', 'Update Details', and 'Quick Update'. At the bottom of the objectives section, there are four buttons: 'Cancel', 'Save as Draft', 'Share with Supervisor', and 'Continue'.

Employee: Shares Objectives Form with Supervisor

Share the Objectives Form with Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Objectives Form with Supervisor
Task	Employee Transfers Objectives Form to Their Supervisor (optional)

- If desired, enters a message to the supervisor in the *Notification Message for Supervisor* box.

- Clicks the *Submit* button.
- Reviews the *Confirmation* message saying that the appraisal has been transferred to their Supervisor/Main Appraiser. Notes that the *Update* icon is now gray.

Employee	Supervisor	Period Start Date	Status	Details	Print	Update
Employee1, Chris	Supervisor1, Pat	30-Mar-2016	Ongoing with Supervisor			

Employee: Shares Objectives Form with Supervisor

Share the Objectives Form with Supervisor

Swim Lane	Employee (Appraisee)
Flow Block	Shares Objectives Form with Supervisor
Task	Employee Transfers Objectives Form to Their Supervisor (optional)

5. Logs out of PRISM.
6. The employee's supervisor receives email and workflow notifications saying that the employee has transferred ownership.

Supervisor: Adds/Reviews/Edits Objectives

Review Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Reviews Objectives Entered by the Employee (optional)

Supervisors cannot view or update the *Objectives* form until employees transfer ownership to them. Once a notification is received saying that ownership has been transferred, then the supervisor can log in to PRISM to access the *Objectives* form. This is also true if the supervisor is the one who will be entering the objectives instead of the employee.

Steps:

1. Log in to PRISM.
2. Select the *PHR Performance Management – Supervisor* responsibility.
3. Select 'Performance Management' to access the *Supervisor Dashboard*.

The screenshot displays the Oracle E-Business Suite interface. At the top, the header reads "ORACLE® E-Business Suite" with navigation links for "Favorites", "Logout", "Preferences", and "Help". Below the header is an "Enterprise Search" bar with a dropdown menu set to "All" and a "Go" button. The user is logged in as "SUPERVISOR1".

The main content area is divided into several sections:

- Main Menu:** A tree view of navigation options. "Performance Management" is highlighted. Other options include "PHR Employee Self-Service", "PHR Performance Management - Employee", "PHR Performance Management - Supervisor", "All Actions Awaiting Your Attention", "Manager Actions", "Appraisals", "PRISM TRKS Supervisor", and "PRISM TRKS Time". A "Personalize" button is located at the top right of this section.
- Worklist:** A section with a "Full List" button. It contains a table with columns "From", "Type", "Subject", "Sent", and "Due". The table is currently empty, with the message "There are no notifications in this view." Below the table are two tips: "TIP Vacation Rules - Redirect or auto-respond to notifications." and "TIP Worklist Access - Specify which users can view and act upon your notifications." A red banner below the tips reads "PRISM TRKS USERS: Approved timecards are due before noon on Monday."
- Favorites:** A section with a "Personalize" button. It contains the text: "You have not selected any favorites. Please use the 'Personalize' button to set up your favorites."

Supervisor: Adds/Reviews/Edits Objectives

Review Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Reviews Objectives Entered by the Employee (optional)

4. Finds the *Task* for the current year (the name changes each year).
5. Clicks the *Go To Task* icon.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Logged In As Supervisor1, Pat

On this page, you can access worker development functions and view performance management notification messages.

Performance Management Task List

Expand All Collapse All

Focus Task	Process	Start Date	End Date	Go to Task
Fiscal 2017 Non-Supervisory		30-Mar-2016	30-Apr-2016	
Manage appraisals: Appraisal-Non-Supervisory Role v3	Appraisal	30-Mar-2016	30-Apr-2016	

Notifications Awaiting Your Attention

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
No results found.							

Switch Manager

To perform tasks as a different manager, select from the list.

Switch Manager

View By Reporting Hierarchy

Reports

- Appraisal Summary

Help

Plan	Attachments
Fiscal 2017 Non-Supervisory	

6. The *Main Appraiser* page will open.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser

Selected Plan Is Fiscal 2017 Non-Supervis

Objectives As Supervisor

Objectives in Progress

Employee	Period Start Date	Status	Details	Print	Update
Employee1, Chris	30-Mar-2016	Ongoing with Supervisor			

Supervisor: Adds/Reviews/Edits Objectives

Review Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Reviews Objectives Entered by the Employee (optional)

- Click the *Update* icon.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". The main menu shows "Appraisals" and "Performance Management". The user is logged in as "Main Appraiser" and the selected plan is "Fiscal 2017 Non-Supervisory".

The "Objectives As Supervisor" section displays a table of objectives in progress:

Employee	Period Start Date	Status	Details	Print	Update
Employee1, Chris	30-Mar-2016	Ongoing with Supervisor			

Below the table, there is an "Info Online" section with a "Topics" sub-section containing a link to "Handbook".

The "Current Workers" section is followed by the "Completed Appraisals" section, which includes a filter for completed appraisals using any combination of Appraiser, Appraisal Date, and Appraisal Purpose. The filter fields are:

- Employee: (Last Name, Title, First Name)
- Appraisal Date: (example: 30-Mar-2016)

Buttons for "Go" and "Clear" are provided. Below the filter is a table with the following columns: Employee, Appraisal Date, Period Start Date, Period End Date, Details, and Print. The table currently shows "No results found."

Supervisor: Adds/Reviews/Edits Objectives

Review Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Reviews Objectives Entered by the Employee (optional)

8. Review the objectives entered by the employee, if any.

ORACLE[®] PHR Performance Management - Supervisor

Home Logout Preferences Help

Supervisor Review

Share with Employee Update Objectives

Employee Name **Employee1, Chris** Employee Number **167842**
 Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Date Completed
Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	
Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	

[Return to Summary](#) Share with Employee Update Objectives

Supervisor: Adds/Reviews/Edits Objectives

Review Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Reviews Objectives Entered by the Employee (optional)

9. Click the *Show* link to see the details of the objectives.

ORACLE[®] PHR Performance Management - Supervisor

[Home](#) [Logout](#) [Preferences](#) [Help](#)

[Navigator](#) [Favorites](#)

Supervisor Review

Employee Name: **Employee1, Chris**
 Organization Email Address: kbird@cfo.pitt.edu
 Manager: **Supervisor1, Pat**

Employee Number: **167842**
 Department: **Financial Information Systems**
 Job: **Staff.Administrator.III**

Share with Employee
Update Objectives

Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Date Completed
Hide	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	

Additional Details

Created By: **Employee1, Chris**
 Detail: **Develop the specifications to put form FRM-P2EYF online. Work with the development team to build and test the new form. Revise policy & procedure to accommodate the on-line version. Develop and deliver training.**

Success Criteria: **Paper FRM-P2EYF will be eliminated and seamlessly replaced with an on-line form with no disruption in day-to-day activities.**

Comments:
 Next Review Date: **01-Jan-2017**
 Priority: **High**
 Complete (%):

Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	
----------------------	-------------------	-------------	-------------	--

Supervisor: Adds/Reviews/Edits Objectives

Edit Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Edits Objectives Entered by the Employee (optional)

If the objectives entered by the employee do not require any additional work, skip to the next chapter.

If the supervisor wants to edit the objectives entered by the employee or if the supervisor is the one creating the objectives then the steps below should be followed.

Steps:

1. Click the *Update Objectives* button to open the *Objective Details* page.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review

Share with Employee **Update Objectives**

Employee Name **Employee1, Chris** Employee Number **167842**
 Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

Objectives

Show All Details | Hide All Details

Details	Objective Name	Start Date	Target Date	Date Completed
Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	
Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	

2. Click the *Update Comments* icon next to the objective that is to be changed.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review >

Update Appraisal

Cancel Save as Draft Apply

Employee Name **Employee1, Chris** Employee Number **167842**
 Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
 Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

Objectives

Add Objective

Details	Objective Name	Start Date	Target Date	Date Completed	Duplicate	Update Comments
Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017			
Show	Improve Work Flow	01-Jul-2016	30-Nov-2016			

Supervisor: Adds/Reviews/Edits Objectives

Edit Objectives Entered by the Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Edits Objectives Entered by the Employee (optional)

- Review the data entered by the employee and make any necessary changes.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". The breadcrumb trail is "Supervisor Review > Update Appraisal > Update Objective Details".

The main content area is titled "Update Objective Details" and includes the instruction: "Click Add Objective to create objectives against which you measure performance." Below this are three buttons: "Cancel", "Save as Draft", and "Apply".

The form contains the following fields:

- * Objective Name: Improve Work Flow
- Created By: Employee1, Chris
- * Start Date: 01-Jul-2016
- Target Date: 30-Nov-2016
- Next Review Date: (empty)
- Priority: High
- Complete (%): (empty)
- Date Completed: (empty)

The "Description" section is expanded, showing three text areas:

- Detail: Modify the existing tasks and forms to provide a more efficient flow and faster completion of work.
- Success Criteria: Realize a 10% improvement in effort and work completion.
- Comments: (empty)

- When finished editing, click the *Apply* button to save the changes.

Supervisor: Adds/Reviews/Edits Objectives

Add Objectives

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Adds Objectives (optional)

If there were any incomplete objectives from the prior appraisal year, they will automatically transfer over into the current year. In this case, the objectives will already be on the *Objectives* form when it is opened along with any objectives entered by the employee. If there weren't any incomplete objectives from the prior appraisal year and if the employee didn't enter any, then the *Objectives* form will be empty.

Additional objectives can be added, however employees will not be able to update objectives that are created by their supervisor. They will be able to send comments but any updates to these objectives must be entered by the supervisor.

Steps:

NOTE: Adding objectives into the on-line tool is optional. However, to add an objective, certain fields are required. Please see the notation after each step. In the on-line tool required fields are marked with an asterisk (*).

1. Click the *Add Objective* button. (required)

The screenshot shows the Oracle PHR Performance Management - Employee interface. At the top, there is a blue header with the Oracle logo and the text 'ORACLE PHR Performance Management - Employee'. Below the header, there are navigation links: 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. The main content area is divided into two tabs: 'Overview' (selected) and 'Review'. Below the tabs, there are four buttons: 'Cancel', 'Save as Draft', 'Share with Supervisor', and 'Continue'. The employee information is displayed: Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Manager: Supervisor1, Pat; Employee Number: 167842; Department: Financial Information Systems; Job: Staff.Administrator.III. Below the employee information, there is a section titled 'Objectives'. At the top of this section is a button labeled 'Add Objective', which is circled in purple. Below the button is a table with the following columns: Objective Name, Start Date, Target Date, Date Completed, Duplicate, Update Details, and Quick Update. The table currently shows 'No results found.' At the bottom of the 'Objectives' section, there are four buttons: 'Cancel', 'Save as Draft', 'Share with Supervisor', and 'Continue'.

2. In the *Objective Name* field, enter a descriptive name for the objective. (required)
3. In the *Start Date* field, enter the date on which the objective is scheduled to start or the actual date if the work has already started. (required)

Supervisor: Adds/Reviews/Edits Objectives

Add Objectives

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Adds Objectives (optional)

4. In the *Target Date* field, enter the date by which the objective should be completed. (optional)
5. If this objective should be reviewed periodically, enter the next review date in the *Next Review Date* field. (optional) It is not necessary to enter a date for the annual performance appraisal review.
6. Select the appropriate level from the drop down in the *Priority* field. (optional)
7. If any work has already been completed on the objective, enters an appropriate percent in the *Complete %* field. (optional) If the work has not started, enter 0% or leave the field blank.
8. More detailed information about the objective can be entered into the *Detail* box. (optional)
9. Text detailing the criteria to measure the success of the objective can be entered into the *Success Criteria* box. (optional)
10. Comments about the objective can be entered into the *Comments* box. (optional)

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review > Update Appraisal >

Update Objective Details

Click Add Objective to create objectives against which you measure performance. Cancel Save as Draft Apply

* Indicates required field

* Objective Name Complete (%)

Created By **Supervisor1, Pat** Date Completed

* Start Date

Target Date

Next Review Date

Priority

Description

Detail

Success Criteria

Comments

Supervisor: Adds/Reviews/Edits Objectives

Add Objectives

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Adds/Reviews/Edits Objectives
Task	Supervisor Adds Objectives (optional)

11. Click the *Apply and Add Another* button to save the objective and enter another or alternatively, click the *Apply* button to save the objective.
12. Click the *Apply* button to return to the *Supervisor Review* page.

ORACLE PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review

Share with Employee Update Objectives

Employee Name **Employee1, Chris** Employee Number **167842**
Organization Email Address kbird@cfo.pitt.edu Department **Financial Information Systems**
Manager **Supervisor1, Pat** Job **Staff.Administrator.III**

Objectives

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Date Completed
+ Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	
+ Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	
+ Show	Update Department Web Page	15-Aug-2016	31-Dec-2016	

Supervisor: Additional Work by Employee? – Yes

Share Objectives Form with Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Additional Work by Employee? - Yes
Task	Supervisor Shares Objectives Form with Employee (optional)

If the supervisor would like the employee to do any additional work on the objectives (add/edit/delete), ownership of the *Objectives* form must be transferred back to the employee.

NOTE: Even though the supervisor has the ability to add objectives, if the employee is to update the progress throughout the appraisal year, it is best to have the employee add the objective. If the supervisor adds the objective, the supervisor must complete the progress updates.

Steps:

1. From the *Supervisor Review* page, click the *Share with Employee* button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "ORACLE[®] PHR Performance Management - Supervisor". The navigation bar includes "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". The main content area is titled "Supervisor Review". On the right side, there are two buttons: "Share with Employee" (circled in purple) and "Update Objectives". Below these buttons, the employee and manager information is displayed:

Employee Name	Employee1, Chris	Employee Number	167842
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Below the information is a section titled "Objectives" with a table of objective details:

Details	Objective Name	Start Date	Target Date	Date Completed
+ Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	
+ Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	
+ Show	Update Department Web Page	15-Aug-2016	31-Dec-2016	

Supervisor: Additional Work by Employee? – Yes

Share Objectives Form with Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Additional Work by Employee? - Yes
Task	Supervisor Shares Objectives Form with Employee (optional)

2. The *Share Appraisal Details with Appraisee* page will open. In this case, the employee needs the ability to update the *Objectives* page. To allow this, click the *Update Appraisal* check box.

ORACLE[®] PHR Performance Management - Supervisor

Home Logout Preferences Help

Share Appraisal Details with Appraisee

Cancel Submit

Details to be Shared with Appraisee

Select appraisal components completed by the main appraiser to share with the appraisee.

Competency Ratings and Comments Overall Rating

Objective Ratings and Comments Overall Comments

Appraisal Ownership

Select Main Appraiser Retains Ownership to continue updating the appraisal.

Main Appraiser Retains Ownership

Appraisee Permissions

Indicate whether the appraisee can update the appraisal, provide feedback on the overall rating, and view and add participant names.

Update Appraisal Participant Details

Provide Feedback on Overall Rating
Select only if you also select Overall Rating

Notification Message to Appraisee

Enter your message, and click Submit to share with the employee (appraisee).

3. Uncheck any other boxes on this page that defaulted to 'checked.'

Supervisor: Additional Work by Employee? – Yes

Share Objectives Form with Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Additional Work by Employee? - Yes
Task	Supervisor Shares Objectives Form with Employee (optional)

4. Enter instructions about what the employee needs to do to complete the objective setting in the *Notification Message to Employee (Appraisee)* box.

Notification Message to Appraisee

Enter your message, and click Submit to share with the employee (appraisee).

Hi Chris,
 As discussed on the telephone, please add the additional Success Criteria to the Improve Work Flow objective. When you are finished, please transfer the Objectives form back to me for review.
 Thanks,
 Pat

5. Click the *Submit* button to transfer the *Objectives* form to the employee and return to the *Main Appraiser* page.
6. On the *Main Appraiser* page, the *Update* icon is now gray and the *Status* is 'Transferred to Employee'.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser

Selected Plan Is Fiscal 2017 Non-Supervisor

Objectives As Supervisor

Objectives in Progress

Employee	Period Start Date	Status	Details	Print	Update
Employee1, Chris	30-Mar-2016	Transferred to Employee	📄	🖨️	✎️

Info Online

Topics

Supervisor: Approves Objectives and Transfers Objectives Form Back to Employee

Share Objectives Form Approval With Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Approves Objectives and Transfers Objectives Form Back to Employee
Task	Supervisor Approves and Shares Objectives Form with Employee (optional)

When work on the objectives is complete the supervisor should transfer the *Objectives* form back to the employee with a message saying the objectives are approved.

If the employee will be updating the objectives during the course of the performance year, he/she should retain ownership of the *Objectives* form. If the updates will be entered by the supervisor, then the employee should transfer the *Objectives* form back to the supervisor after reviewing the approval.

During the performance year, ownership of the *Objectives* form can be passed back and forth as many times as necessary.

Steps:

1. From the *Supervisor Review* page, click the *Share with Employee* button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "Supervisor Review". In the top right corner, there are navigation links: Home, Logout, Preferences, and Help. Below the navigation, there are two buttons: "Share with Employee" (circled in red) and "Update Objectives".

Employee Information:

- Employee Name: **Employee1, Chris**
- Organization Email Address: kbird@cfo.pitt.edu
- Employee Number: **167842**
- Department: **Financial Information Systems**
- Manager: **Supervisor1, Pat**
- Job: **Staff.Administrator.III**

Objectives Table:

Details	Objective Name	Start Date	Target Date	Date Completed
Show	Automate FRM-P2EYF	01-Sep-2016	01-Apr-2017	
Show	Improve Work Flow	01-Jul-2016	30-Nov-2016	
Show	Update Department Web Page	15-Aug-2016	31-Dec-2016	

Supervisor: Approves Objectives and Transfers Objectives Form Back to Employee

Share Objectives Form Approval With Employee

Swim Lane	Supervisor (Main Appraiser)
Flow Block	Approves Objectives and Transfers Objectives Form Back to Employee
Task	Supervisor Approves and Shares Objectives Form with Employee (optional)

2. Be sure all of the boxes on the *Share Appraisal Details with Appraisee* form are unchecked except for the *Update Appraisal* box.
NOTE: Even if the *Update Appraisal* box is checked, employees will not be able to update objectives that were entered by their supervisor; they can only send comments.
3. Enter a message approving the objectives and click the *Submit* button,

ORACLE® PHR Performance Management - Supervisor

Home Logout Preferences Help

Share Appraisal Details with Appraisee

Cancel Submit

Details to be Shared with Appraisee

Select appraisal components completed by the main appraiser to share with the appraisee.

Competency Ratings and Comments Overall Rating
 Objective Ratings and Comments Overall Comments

Appraisal Ownership

Select Main Appraiser Retains Ownership to continue updating the appraisal.

Main Appraiser Retains Ownership

Appraisee Permissions

Indicate whether the appraisee can update the appraisal, provide feedback on the overall rating, and view and add participant names.

Update Appraisal Participant Details
 Provide Feedback on Overall Rating
Select only if you also select Overall Rating

Notification Message to Appraisee

Enter your message, and click Submit to share with the employee (appraisee).

The Objectives for Fiscal 2017 are approved. Please update them with progress throughout the year.
Thank you,
Pat

4. After clicking the *Submit* button, the *Objectives* form will be transferred to the employee.

Employee: Updates Progress

Update Progress

Swim Lane	Employee (Appraiser)/Supervisor (Main Appraiser)
Flow Block	Updates Progress
Task	Employee Updates Progress

The instructions for updating the objectives are the same as those for adding objectives. Please refer to the previous chapters for instructions.

If an objective was entered by a supervisor, it cannot be updated by the employee. Instead, employees can send comments about the progress.

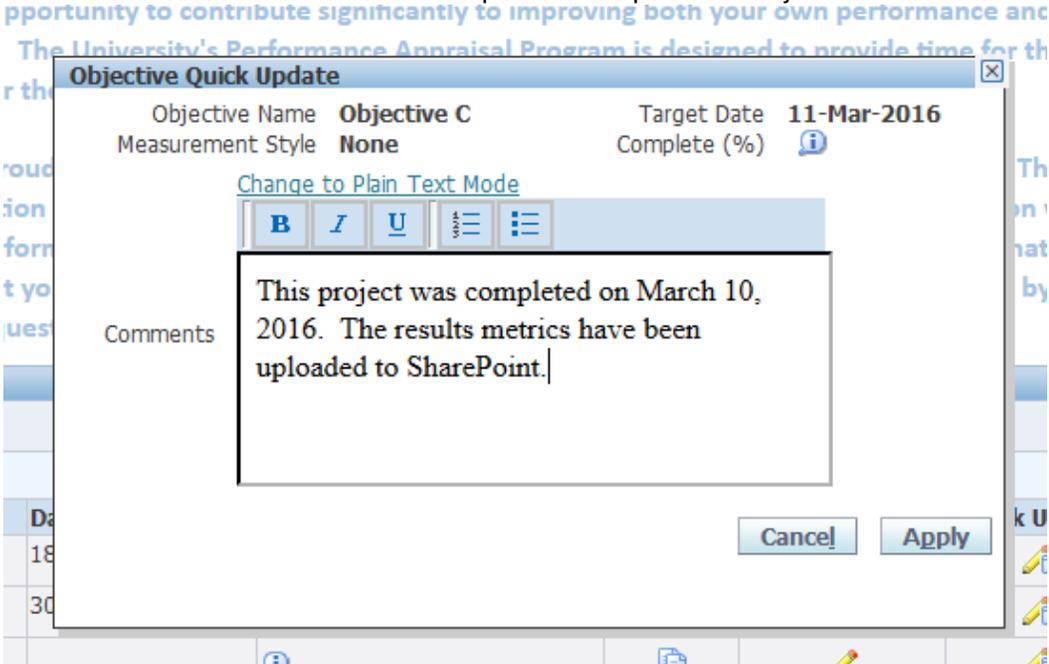
The Employee:

1. In this case the clicks the *Quick Update* icon.



Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	Update Details	Quick Update
Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result			
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result			
Objective C	07-Nov-2015	11-Mar-2016					

2. Enters comments that will enable the supervisor to update the objective.



Objective Quick Update

Objective Name **Objective C** Target Date **11-Mar-2016**
Measurement Style **None** Complete (%)

[Change to Plain Text Mode](#)

B *I* U

Comments: This project was completed on March 10, 2016. The results metrics have been uploaded to SharePoint.

3. Shares the *Objectives* form with their supervisor so the supervisor can update the objectives.

Printing

General

There are several ways to print a performance appraisal or the *Objectives* form. Certain pages have a *Printable Page* button that will print the current form in its entirety. There is also a print feature that is accessed from the *Print* icon on the *My Appraisals* and the *Main Appraiser* pages. Printing from the *Print* icon includes options to print certain parts of the page.

NOTE: For printing purposes, the on-line tool refers to both the performance appraisals and the *Objectives* form as 'the appraisal'.

Printing Using the Printable Page Button

Steps:

1. When on a page with a *Printable Page* button, click the button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The top navigation bar includes 'ORACLE PHR Performance Management - Supervisor', 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below the navigation bar, the page title is 'Details: Main Appraiser'. There are three buttons: 'Update', 'Share with Appraisee', and 'Printable Page', with the 'Printable Page' button circled in purple. The main content area displays employee and appraisal details:

Employee Name	Employee1, Chris	Employee Number	167842
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Setup Details

Initiator	Employee1, Chris	Main Appraiser	Supervisor1, Pat
Appraisal Purpose		Appraisal Date	30-Mar-2016
Period Start Date	30-Mar-2016	Next Appraisal Date	
Period End Date	30-Apr-2016		
Template	Appraisal-Non-Supervisory Role v3		

Overall Rating and Comments

Overall Rating	
Overall Comments	
Appraisee Feedback	

2. A page formatted for printing will open.
3. Use the print feature of your browser to print the page.

Printing an in-progress performance appraisal or the Objectives form

In-progress performance appraisals and the *Objectives* form are both printed from the same place.

Steps:

1. Log in to PRISM.

Printing

Printing an in-progress performance appraisal or the Objectives form

2. Select either the *PHR Performance Management – Employee* or *PHR Performance Management – Supervisor* responsibility as appropriate.
3. Select *Performance Management* to access the dashboard.
4. From the *Performance Management Dashboard*, click the *Go To Task* icon for the current performance management task.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

Appraisals Performance Management

Logged In As Supervisor1, Pat

On this page, you can access worker development functions and view performance management notification messages.

Performance Management Task List

[Expand All](#) | [Collapse All](#)

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Fiscal 2017 Non-Supervisory Manage appraisals: Appraisal-Non-Supervisory Role v3	Appraisal	30-Mar-2016	30-Apr-2016	

Notifications Awaiting Your Attention

Subject	Sent Name	Department	Job	Effective Date	Update	Delete
No results found.						

Switch Manager
To perform tasks as a different manager, select from the list.
[Switch Manager](#)
[View By Reporting Hierarchy](#)

Reports
• [Appraisal Summary](#)

Help

Plan	Attachments
Fiscal 2017 Non-Supervisory	

5. From the *Main Appraiser* or *My Appraisals* form, click the *Details* icon.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

Appraisals Performance Management

Main Appraiser

Selected Plan Is Fiscal 2017 Non-Supervisory

Objectives As Supervisor

Objectives in Progress

Employee	Period Start Date	Status	Details	Print	Update
Employee1, Chris	30-Mar-2016	Ongoing with Supervisor			

Info Online

Topics

[Handbook](#)

6. Click the *Printable Page* button and print using the browser's printer function.

Details: Employee

[Back](#) [Printable Page](#)

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Printing

Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved

The following instructions are for using the *Print* icon to print a performance appraisal before that appraisal has been approved. The instructions are the same for both employees and supervisors.

Steps:

1. Login to PRISM.
2. Select either the *PHR Performance Management – Employee* responsibility or the *PHR Performance Management – Supervisor* responsibility as appropriate.
3. Click *Performance Management* to access the *Performance Management Dashboard*.
4. Click the *Go To Task* icon for the current *Performance Management* task.

ORACLE® PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

Logged In As Employee1, Chris

On this page, you can access your development functions and view Performance management notification messages.

Performance Management Task List

[Expand All](#) | [Collapse All](#)

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Fiscal 2016 Non-Supervisory		21-Mar-2016	16-Apr-2016	
Manage appraisal: Appraisal-Non-Supervisory Role v3	Appraisal	21-Mar-2016	16-Apr-2016	

Notifications Awaiting Your Attention

Subject	Sent Name	Department	Job	Effective Date	Update	Delete
No results found.						

Help

Plan	Click to Access Help Documents
Fiscal 2016 Non-Supervisory	

[Click here to access the Performance Management website.](#)

5. Click the *Print* icon on either the *Main Appraiser* page or on the *My Appraisals* page.

ORACLE® PHR Performance Management - Employee

Navigator Favorites Home Logout Preferences Help

Appraisals Performance Management

My Appraisals Participant

Selected Plan Is Fiscal 2017 Non-Supervisory

Objectives

Appraisals of Employee1, Chris

Employee	Supervisor	Period Start Date	Status	Details	Print	Update
Employee1, Chris	Supervisor1, Pat	30-Mar-2016	Transferred to Employee			

Printing

Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved

6. Select either *Form Layout* or *Table Layout*.
NOTE: The *Form Layout* arranges the data in a 2-column table with labels in the first column and the data in the second as follows:

Core.Initiating Action

Main Appraiser

Name	Supervisor1, Pat
Performance Rating	3-Successful
Comments	

Core.Interpersonal Communication

Main Appraiser

Name	Supervisor1, Pat
Performance Rating	2-Needs Development
Comments	

NOTE: The *Table Layout* arranges the data in a table with the labels going across the top and the data below as follows:

Core.Decision Making

Name	Type	Performance Rating	Comments
Supervisor1, Pat	Main Appraiser	3-Successful	

Core.Initiating Action

Name	Type	Performance Rating	Comments
Supervisor1, Pat	Main Appraiser	3-Successful	

Printing

Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved

7. Select the *Print Layout* to be used by clicking the radio button beside it.

Configure Print Options for Printable Page

Check All

Uncheck All

Back

Print

Select the printable option as table or form layout. The table layout presents objectives and competency details in a tabular format. The form layout presents objectives and competency details in continuous text format.

Form Layout

Table Layout

8. Check the *Include Setup Details* box if basic information about the employee should be printed.

NOTE: Example of Setup Details:

Worker Details

Employee name	Employee1, Chris
Assignment Number	166670
Manager	Supervisor1, Pat
Department	Financial Information Systems
Job	Staff.Administrator.III

Include Setup Details

9. If *Competency Ratings* and *Comments* should be printed, check the *Include Competency Details* box.

ORACLE[®] PHR Performance Management - Employee

Home Navigator Favorites Logout Preferences

Configure Print Options for Printable Page

Check All

Uncheck All

Back

Print

Select the printable option as table or form layout. The table layout presents objectives and competency details in a tabular format. The form layout presents objectives and competency details in continuous text format.

Form Layout

Table Layout

Include Setup Details

Include Competency Details

Printing

Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved

10. Highlight the *Details* to be printed. Select one, two or all of the *Available Details* to be included in the printout. Do not select 'Appraiser Comments' or 'Appraiser Performance Rating' as no data is collected in those columns.

Include Competency Details

Available Details

- Appraiser Comments
- Appraiser Performance Rating
- Main Appraiser Comments
- Main Appraiser Performance Rating
- Overall Rating and Comments

Selected Details

Move

Move All

Remove

Remove All

Description

The performance rating that the main

11. After selecting the *Available Details* to be included in the printout, click the *Move* arrow to move them to the *Selected Details* box.

Include Competency Details

Available Details

- Appraiser Comments
- Appraiser Performance Rating

Selected Details

- Main Appraiser Comments
- Main Appraiser Performance Rating
- Overall Rating and Comments

Move

Move All

Remove

12. Follow steps 9, 10 & 11 if Objectives should be included in the printout.

Include Objective Details

Available Details

Selected Details

- Appraiser Comments
- Appraiser Rating
- Main Appraiser Comments
- Main Appraiser Rating
- Overall Rating and Comments

Move

Move All

Printing

Printing a Completed Performance Appraisal Using the Print Icon Before the Appraisal is Approved

13. If the questionnaire is to be included in the printout, check the *Questionnaire* box and then the *Appraisee Questionnaire* box.

Include Questionnaire
 Appraisee Questionnaire

[Check All](#) [Uncheck All](#) [Back](#) [Print](#)

14. Click the *Print* button to continue.
15. The system will create a PDF that can be saved or printed.

Worker Details

Employee name	Employee1, Chris
Assignment Number	166670
Manager	Supervisor1, Pat
Department	Financial Information Systems
Job	Staff Administrator.III

Appraisal Details

Appraisal Template	Appraisal-Non-Supervisory Role v3
Appraisal Purpose	
Period Start Date	2016-03-21
Period End Date	2016-04-16
Initiator	Employee1, Chris
Main Appraiser	Supervisor1, Pat
Appraisal Date	2016-03-21
Next Appraisal Date	

Competency Details

Core.Composure

Worker Details

Employee name	Employee1, Chris
Assignment Number	166670
Manager	Supervisor1, Pat
Department	Financial Information Systems
Job	Staff Administrator.III

Appraisal Details

Appraisal Template	Appraisal-Non-Supervisory Role v3
Appraisal Purpose	
Period Start Date	2016-03-21
Period End Date	2016-04-16
Initiator	Employee1, Chris
Main Appraiser	Supervisor1, Pat
Appraisal Date	2016-03-21
Next Appraisal Date	

Competency Details

Core.Composure

Printing

Printing a Completed Performance Appraisal Using the Print Icon After the Appraisal is Approved

After a performance appraisal is approved, it becomes part of history and is stored on the *Appraisals* tab.

ORACLE PHR Performance Management - Employee

Home Logout Preferences Help

Appraisals Performance Management

Logged In As Employee1, Chris

On this page, you can access your development functions and view Performance management notification messages.

Performance Management Task List

[Expand All](#) | [Collapse All](#)

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Fiscal 2016 Non-Supervisory Manage appraisal: Appraisal-Non-Supervisory Role v3	Appraisal	21-Mar-2016	16-Apr-2016	

Help

Plan	Click to Access Help Documents
Fiscal 2016 Non-Supervisory	

[Click here](#) to access the Performance Management website.

Steps:

1. Employees: Click the *Appraisals* tab and look at the *Completed Appraisals* section at the bottom of the page. Use the search feature to find the appraisal. Once the appraisal is found, click the *Print* icon and follow the instructions in the previous section to set up the printout.

Completed Appraisals

Note that the search is case insensitive

Initiator

Appraisal Date (example: 18-Mar-2016)

Initiator	Appraisal Date	Period Start Date	Period End Date	Appraisal Purpose	Details Print Plan
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016		Fiscal 2016 Non-Supervisory

Printing

Printing a Completed Performance Appraisal Using the Print Icon After the Appraisal is Approved

- Supervisors: Click the *Appraisals* tab and look at the *Completed Appraisals* section at the bottom of the page. Use the search feature to find the appraisal. Once the appraisal is found, click the *Print* icon and follow the instructions in the previous section to set up the printout.

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Employee

Last Name, Title, First Name

Appraisal Date

(example: 18-Mar-2016)

Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016				

Supervisor: Viewing Performance Appraisal Progress

Appraisal Summary Report

The *Appraisal Summary Report* allows supervisors to view the progress of the performance appraisal process for the people reporting to them. The report returns data in three views.

Appraisal Summary View

The *Appraisal Summary View* lists the supervisors who report to the supervisor who is logged in. It shows the number of people with each overall rating and the number whose appraisal has not started yet.

Appraisal Summary							
Appraisal Summary as on 10-Feb-2016 Summary for Manager Employee1, Lisa Louise							
Logged in manager can view appraisals of direct reports and indirect reports in their reporting line.							
Manager	1- Unsatisfactory	2-Needs Development	3-Successful	4-Above Expectations	5-Exceptional	Not Appraised	Total
Employee20, Megan Eileen	0	0	2	1	0	11	14
Employee11, Dianna Lynn	0	0	1	1	0	6	8
Employee1, Lisa Louise	1	0	1	0	1	6	9
Employee49, Lorraine M	0	0	0	0	1	0	1
Employee31, Angel Diana	0	2	3	0	1	11	17
Employee3, Janet L	0	1	1	0	0	2	4
Total	1	3	8	2	3	36	53

Supervisors can drill down into their own or into each of their supervisor's details by clicking on the total on the supervisor's row. The detail shows each employee's name, the overall rating if it has been assigned and the appraisal status.

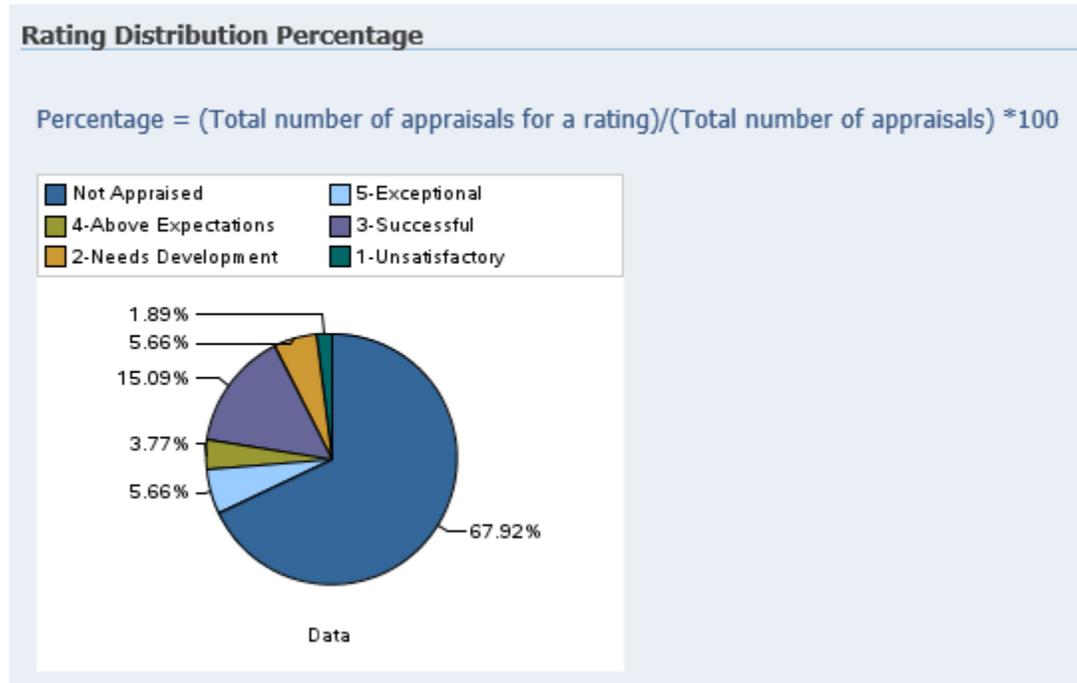
Appraisal Details							
Manager Employee31, Angel Diana							
<div style="text-align: right;"> Previous 1-10 Next 10 </div>							
Appraisal Template	Appraisee	Main Appraiser	Appraisal Date	Start Date	End Date	Rating	Status
Appraisal-Non-Supervisory Role v2	Employee33, Sierra	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	2-Needs Development	Completed
Appraisal-Non-Supervisory Role v2	Employee39, Patricia	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned
Appraisal-Non-Supervisory Role v2	Employee40, Patricia	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned
Appraisal-Non-Supervisory Role v2	Employee38, Carol	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned
Appraisal-Non-Supervisory Role v2	Employee34, Stacey	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Ongoing with Supervisor
Appraisal-Non-Supervisory Role v2	Employee48, Amanda	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	5-Exceptional	Pending Approval
Appraisal-Non-Supervisory Role v2	Employee32, Danielle	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned
Appraisal-Non-Supervisory Role v2	Employee36, Lisa	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	3-Successful	Completed
Appraisal-Non-Supervisory Role v2	Employee37, Sara	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned
Appraisal-Non-Supervisory Role v2	Employee35, Jamie	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Ongoing with Supervisor
<div style="text-align: right;"> Previous 1-10 Next 10 </div>							

Supervisor: Viewing Performance Appraisal Progress

Appraisal Summary Report

Rating Distribution Percentage View

The *Rating Distribution Percentage View* shows the distribution of overall ratings.

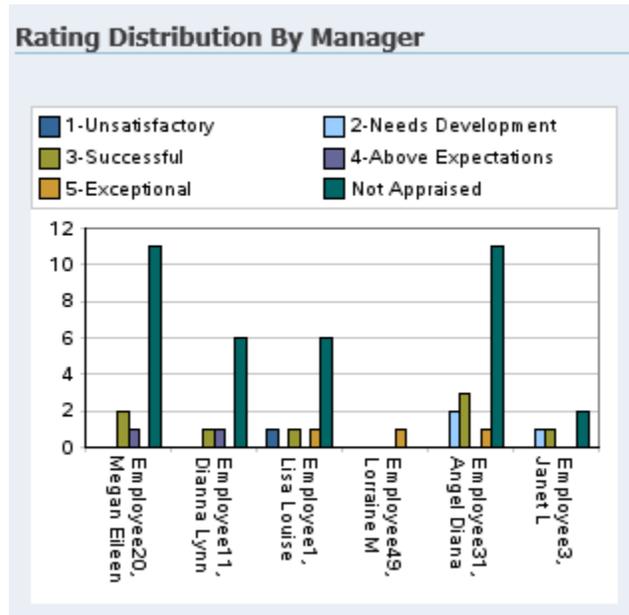


Supervisor: Viewing Performance Appraisal Progress

Appraisal Summary Report

Rating Distribution by Manager

The third view, *Rating Distribution by Manager*, shows the overall ratings by supervisor.



Steps:

1. Log in and select the *PHR Performance Management – Supervisor* responsibility.
2. Click the *Appraisal Summary Report* link on the *Supervisor’s Dashboard*.

ORACLE PHR Performance Management - Supervisor

Appraisals Performance Management

Logged In As Employee1, Lisa

On this page, you can access worker development functions and view performance management notification messages.

Performance Management Task List

Expand All | Collapse All

Focus Task	Process	Start Date	End Date	Go to Task
My Plans				
Employee1 PMP		04-Feb-2016	30-Jun-2016	
Manage appraisals: Appraisal-Non-Supervisory Role v2	Appraisal	04-Feb-2016	30-Jun-2016	

Switch Manager

To perform tasks as a different manager, select from the list.

Switch Manager

View By Reporting Hierarchy

Reports

- Appraisal Summary

Help

Plan Click to Access Help Documents

Supervisor: Viewing Performance Appraisal Progress

Appraisal Summary Report

3. Select the current Plan from the drop-down list in the *Plan* field and click the *Go* button.

The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The page title is "Performance Management Plan Appraisal Rating Summary". The "Select and Search" section contains a form with the following elements:

- A dropdown menu for "Plan" with the value "Employee1 PMP".
- A search icon to the right of the dropdown.
- A text prompt: "Select a plan to display the appraisal period."
- A "Select Appraisal Period" label.
- A table with the following data:

Select Appraisal Template	Start Date	End Date
<input type="radio"/> Appraisal-Non-Supervisory Role v2	04-Feb-2016	31-Mar-2016

Below the table is a "Go" button, which is circled in red. The "Plan" dropdown and search icon are also circled in red.

4. It can take a few minutes for the data to be displayed.

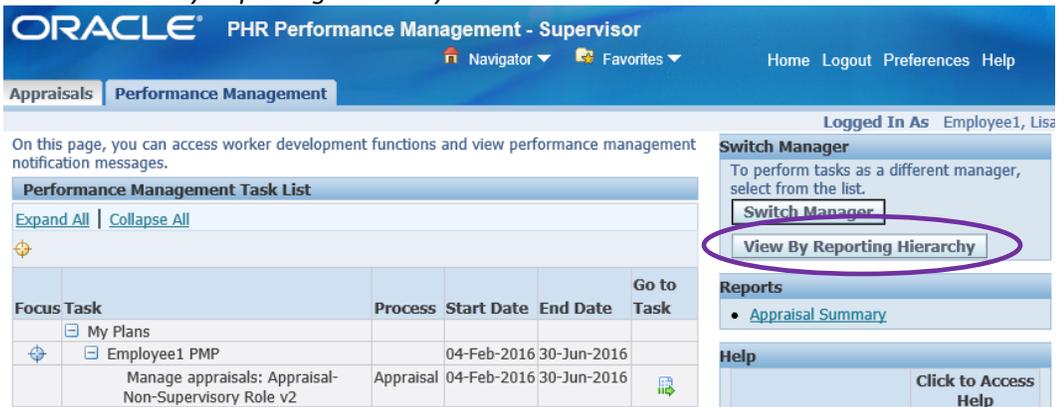
View by Reporting Hierarchy

Access Completed and In-Progress Appraisals by Reporting Hierarchy

Supervisors can view completed or in progress appraisals for the employees who report to them or who report to someone who reports to them.

Steps:

1. Log in to PRISM and select the *PHR Performance Management – Supervisor* responsibility.
2. Select *Performance Management* to access the *Supervisor Dashboard*.
3. Click the *View by Reporting Hierarchy* button.



The screenshot shows the Oracle PHR Performance Management - Supervisor interface. The main content area is titled "Performance Management Task List" and contains a table with columns for Focus Task, Process, Start Date, End Date, and Go to Task. A "View By Reporting Hierarchy" button is highlighted with a purple circle in the right-hand sidebar.

Focus Task	Process	Start Date	End Date	Go to Task
My Plans				
Employee1 PMP		04-Feb-2016	30-Jun-2016	
Manage appraisals: Appraisal-Non-Supervisory Role v2	Appraisal	04-Feb-2016	30-Jun-2016	

Supervisor: Viewing Performance Appraisal Progress

View by Reporting Hierarchy

4. Find the employee in the hierarchy and click the *Action* icon.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

Name Go Advanced Search My List

Performance Management >

Performance Management: People in Hierarchy

Focus Name	Assignment Number	Job	Department	Action	Details
Supervisor1, Pat					
Employee1, Chris	166670	Staff.Administrator.III	Financial Information Systems		
Employee2, Robin	166687	Staff.Administrator.III	Financial Information Systems		

5. Find the appraisal to be viewed and click the *Details* icon to review that appraisal.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

View Appraisals

Appraisals

View All Go

Initiator	Appraisee	Appraisal Date	Appraisal Status	Type	Main Appraiser	Details
Employee1, Chris	Employee1, Chris	21-Mar-2016	Completed		Supervisor1, Pat	

6. The *Appraisal Status* shows the status of each appraisal. In the example below, the appraisal has not been started.

ORACLE PHR Performance Management - Supervisor

Home Logout Preferences Help

View Appraisals

Appraisals

View All Go

Initiator	Appraisee	Appraisal Date	Appraisal Status	Type	Main Appraiser	Details
Employee2, Robin	Employee2, Robin	29-Mar-2016	Planned		Supervisor1, Pat	

7. To narrow the list of appraisals, select either 'Completed' or 'In Progress' from the drop-down list in the *View* field.

Supervisor: Changing Main Appraiser

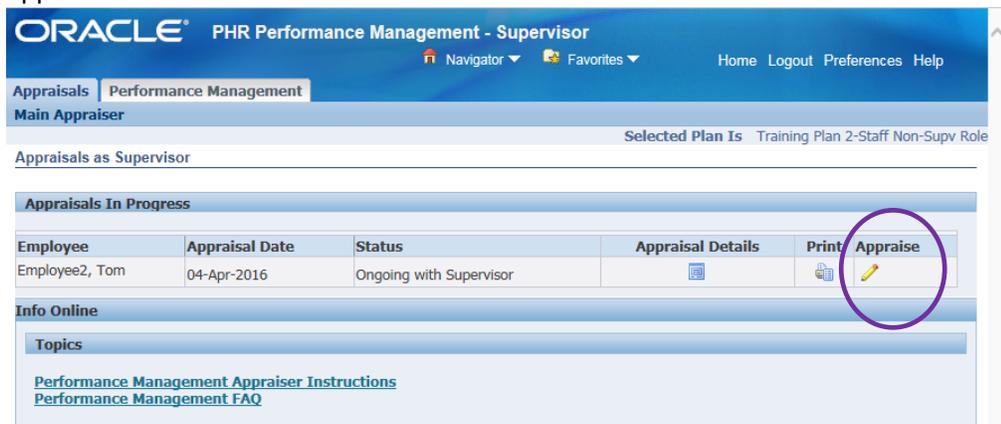
Change Main Appraiser

If a situation arises where the supervisor of record is not the person who should evaluate an employee's performance, the on-line tool allows the supervisor of record to appoint someone else as Main Appraiser.

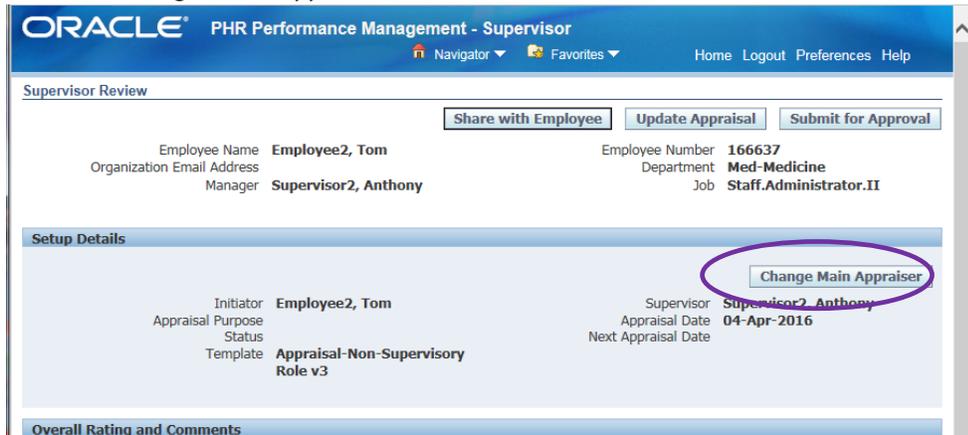
Below are the instructions for a supervisor to change the main appraiser.

Steps:

1. Follow the steps in prior chapters to navigate to the *Supervisor's Dashboard* and then to the *Main Appraiser* tab.
2. Click the *Appraise* icon for the employee who will be changed to a different main appraiser.



3. Click the *Change Main Appraiser* button.



Supervisor: Changing Main Appraiser

Change Main Appraiser

4. Select the name of the current *Main Appraiser* and press the Delete key on the keyboard.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review >

Change Appraisal Details

If you change main appraiser after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal. If you change main appraiser after completing some sections of the appraisal, you remain listed as an appraiser, and any information you enter is retained. However, you can make no further changes to the appraisal. Cancel Apply

* Indicates required field

Appraisal Purpose
Period Start Date **29-Mar-2016**
Period End Date **16-Apr-2016**
Template **Appraisal-Non-Supervisory Role v3**
Appraisal Date **29-Mar-2016**
Next Appraisal Date
Assignment Number **166687**
* Main Appraiser Cancel Apply

5. Type all or part of the new main appraiser's last name in the Main Appraiser field and hit the Tab key on the keyboard.

ORACLE[®] PHR Performance Management - Supervisor

Navigator Favorites Home Logout Preferences Help

Supervisor Review >

Change Appraisal Details

If you change main appraiser after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal. If you change main appraiser after completing some sections of the appraisal, you remain listed as an appraiser, and any information you enter is retained. However, you can make no further changes to the appraisal. Cancel Apply

* Indicates required field

Appraisal Purpose
Period Start Date **29-Mar-2016**
Period End Date **16-Apr-2016**
Template **Appraisal-Non-Supervisory Role v3**
Appraisal Date **29-Mar-2016**
Next Appraisal Date
Assignment Number **166687**
* Main Appraiser Cancel Apply

Supervisor: Changing Main Appraiser

Change Main Appraiser

6. If there is only one match, the new main appraiser's last name will default. If there is more than one match, a list of names will pop up. Click the Quick Select icon beside the correct name.

[Search and Select: Main Appraiser](#)

Select	Quick Select	Full Name	Job
<input type="radio"/>		Employee1, Chris	Staff.Administrator.III
<input type="radio"/>		Supervisor2, Mark	Staff.Administrator.IV

7. Click the *Apply* button.

Appraisal Purpose
Period Start Date 29-Mar-2016
Period End Date 16-Apr-2016
Template Appraisal-Non-Supervisory Role v3
Appraisal Date 29-Mar-2016
Next Appraisal Date
Assignment Number 166687
* Main Appraiser Supervisor2, Mark

8. Enter a message in the *Notification Comments* box and click the *Yes* button.

ORACLE[®]PHR Performance Management - Supervisor

Home Navigator Favorites Home Logout Preferences

Information
To confirm the new main appraiser or update overall comments or rating, click Yes. Once you click Yes, you can no longer make changes to the appraisal.

Notification Comments

Since Ruth reported to you for almost all of the appraisal year, please complete her annual performance appraisal.
Thank you,
Anthony

No Yes

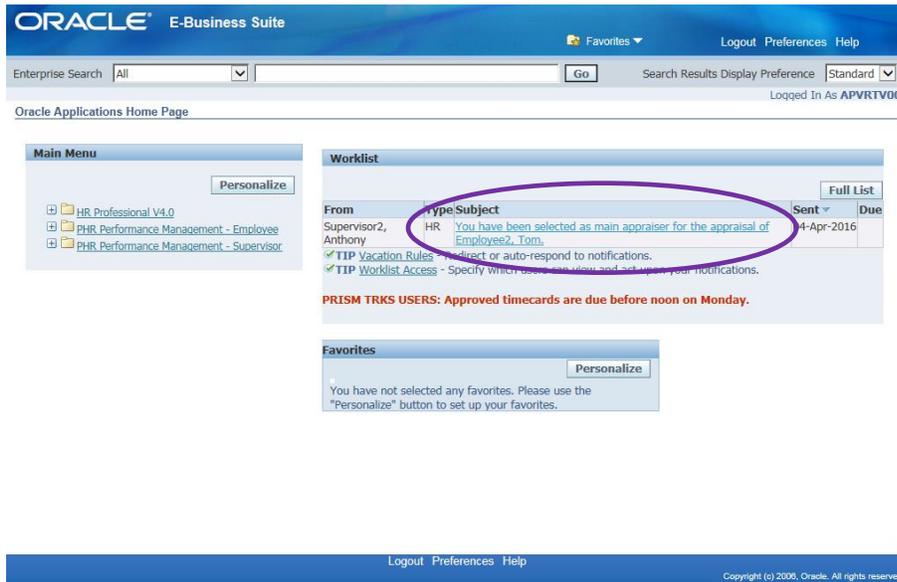
NOTE: Once the Yes button is pressed, the supervisor will no longer be able to access the performance appraisal.

Supervisor: Changing Main Appraiser

Review Main Appraiser Change Notification

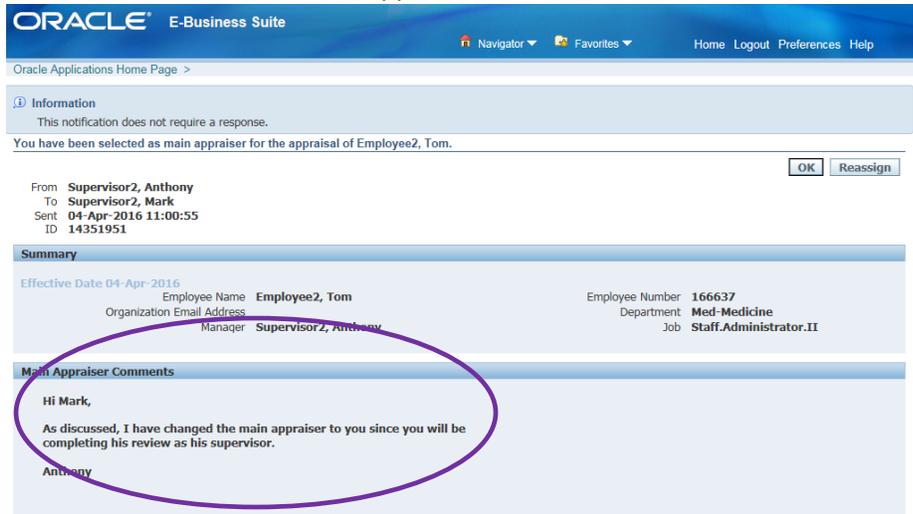
Steps:

1. Log in to PRISM.
2. Click on notification in **Worklist**.



The screenshot shows the Oracle E-Business Suite interface. The top navigation bar includes 'ORACLE E-Business Suite', 'Favorites', 'Logout', 'Preferences', and 'Help'. Below this is an 'Enterprise Search' field with a dropdown menu set to 'All' and a 'Go' button. The page is titled 'Oracle Applications Home Page' and shows the user is logged in as 'APVRTV00'. The main content area is divided into several sections: 'Main Menu' with a 'Personalize' button and links to 'HR Professional V4.0', 'PHR Performance Management - Employee', and 'PHR Performance Management - Supervisor'; 'Worklist' with a 'Full List' button and a table of notifications; and 'Favorites' with a 'Personalize' button. The 'Worklist' table has columns for 'From', 'Type', 'Subject', 'Sent', and 'Due'. A notification from 'Supervisor2, Anthony' is highlighted with a purple oval. The subject of the notification is 'You have been selected as main appraiser for the appraisal of Employee2, Tom.' Below the table, there are checkboxes for 'TIP Vacation Rules' and 'TIP Worklist Access', and a red message: 'PRISM TRKS USERS: Approved timecards are due before noon on Monday.'

3. Review comments from Main Appraiser.



The screenshot shows the details of the notification from the previous step. The top navigation bar includes 'ORACLE E-Business Suite', 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. The page is titled 'Oracle Applications Home Page >'. Below this is an 'Information' section with the text 'This notification does not require a response.' and 'You have been selected as main appraiser for the appraisal of Employee2, Tom.' There are 'OK' and 'Reassign' buttons. The notification details include: 'From: Supervisor2, Anthony', 'To: Supervisor2, Mark', 'Sent: 04-Apr-2016 11:00:55', and 'ID: 14351951'. A 'Summary' section shows: 'Effective Date: 04-Apr-2016', 'Employee Name: Employee2, Tom', 'Employee Number: 166637', 'Organization Email Address: Supervisor2, Anthony', 'Department: Med-Medicine', and 'Job: Staff.Administrator.II'. The 'Main Appraiser Comments' section is highlighted with a purple oval and contains the text: 'Hi Mark, As discussed, I have changed the main appraiser to you since you will be completing his review as his supervisor. Anthony'.

Supervisor: Changing Main Appraiser

Review Main Appraiser Change Notification

4. Scroll down and click on *Update Action* link.

ORACLE E-Business Suite

Oracle Applications Home Page > Worklist >

Information
This notification has been closed and did not require a response.
You have been selected as main appraiser for the appraisal of Employee2, Tom.

From: Supervisor2, Anthony
To: Supervisor2, Mark
Sent: 04-Apr-2016 11:00:55
Closed: 04-Apr-2016 11:15:28
ID: 14351951
Responder: Supervisor2, Mark

Summary

Effective Date: 04-Apr-2016

Employee Name	Employee2, Tom	Employee Number	166637
Organization Email Address		Department	Med-Medicine
Manager	Supervisor2, Anthony	Job	Staff.Administrator.II

Main Appraiser Comments

Hi Mark,
As discussed, I have changed the main appraiser to you since you will be completing his review as his supervisor.
Anthony

Appraisal Details

Initiator	Employee2, Tom	Main Appraiser Name	Supervisor2, Mark
Appraisal Purpose		Appraisal Date	04-Apr-2016
Period Start Date	04-Apr-2016	Next Appraisal Date	
Period End Date	30-Jun-2016		
Template	Appraisal-Non-Supervisory Role v3		

Related Applications

[Update Action](#)

[Return to Worklist](#)

5. Click the *Update* button to open the *Supervisor Review* page.

ORACLE E-Business Suite

Details: Supervisor

[Update](#) [Share with Employee](#) [Printable Page](#)

Employee Name	Employee2, Tom	Employee Number	166637
Organization Email Address		Department	Med-Medicine
Manager	Supervisor2, Anthony	Job	Staff.Administrator.II

Setup Details

Initiator	Employee2, Tom	Supervisor	Supervisor2, Mark
Appraisal Purpose		Appraisal Date	04-Apr-2016
Period Start Date	04-Apr-2016	Next Appraisal Date	
Period End Date	30-Jun-2016		
Template	Appraisal-Non-Supervisory Role v3		

Overall Rating and Comments

Overall Rating
Overall Comments
Employee Feedback

Competencies

Show All Details | Hide All Details

Details Competency

- Show Core.Composure
- Show Core.Decision Making
- Show Core.Initiating Action
- Show Core.Interpersonal Communication
- Show Core.Job Knowledge/Functional and Technical Skills
- Show Core.Organizing and Planning
- Show Core.Quality of Work
- Show Core.Service Orientation
- Show Core.Work Habits

Supervisor: Changing Main Appraiser

Review Main Appraiser Change Notification and Complete Appraisal

- Click on *Update Appraisal* button.

ORACLE E-Business Suite Navigator Favorites Home Logout Preferences Help

Details: Supervisor >
Supervisor Review Share with Employee Update Appraisal Submit for Approval

Employee Name **Employee2, Tom** Employee Number **166637**
Organization Email Address Department **Med-Medicine**
Manager **Supervisor2, Anthony** Job **Staff-Administrator.II**

Setup Details Change Main Appraiser

Initiator **Employee2, Tom** Supervisor **Supervisor2, Mark**
Appraisal Purpose Status Appraisal Date **04-Apr-2016**
Template **Appraisal-Non-Supervisory Role v3** Next Appraisal Date

Overall Rating and Comments
Overall Rating
Overall Comments
Employee Feedback

Manage Participants
Add Participant

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
	No results found.								

Competencies
Show All Details Hide All Details

Details Competency	Supervisor Performance Rating
Show Core.Composure	
Show Core.Decision Making	
Show Core.Initiating Action	
Show Core.Interpersonal Communication	
Show Core.Job Knowledge/Functional and Technical Skills	

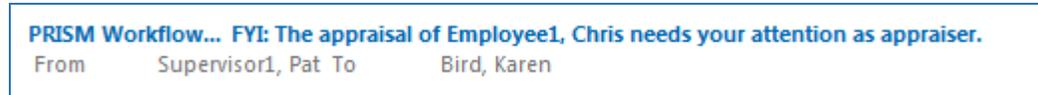
- Refer to the chapters at the beginning of this guide for information about competing the performance appraisal process.
- NOTE: To complete the appraisal process, the new main appraiser must have the PHR Performance Management – Supervisor responsibility. If this responsibility is not on the new main appraiser’s home page after log in, they must contact Human Resources at 412-624-8044 to request access.

Participating as an Additional Appraiser

Participating as an Additional Appraiser

As main appraiser, an employee's supervisor can request that an additional person(s) appraise the employee. The most common reason for this would be if the employee transferred to the current supervisor part way through the performance year, however, there might be other reasons as well.

When the supervisor requests feedback from an additional appraiser, the additional appraiser will receive an email notification requesting their participation.

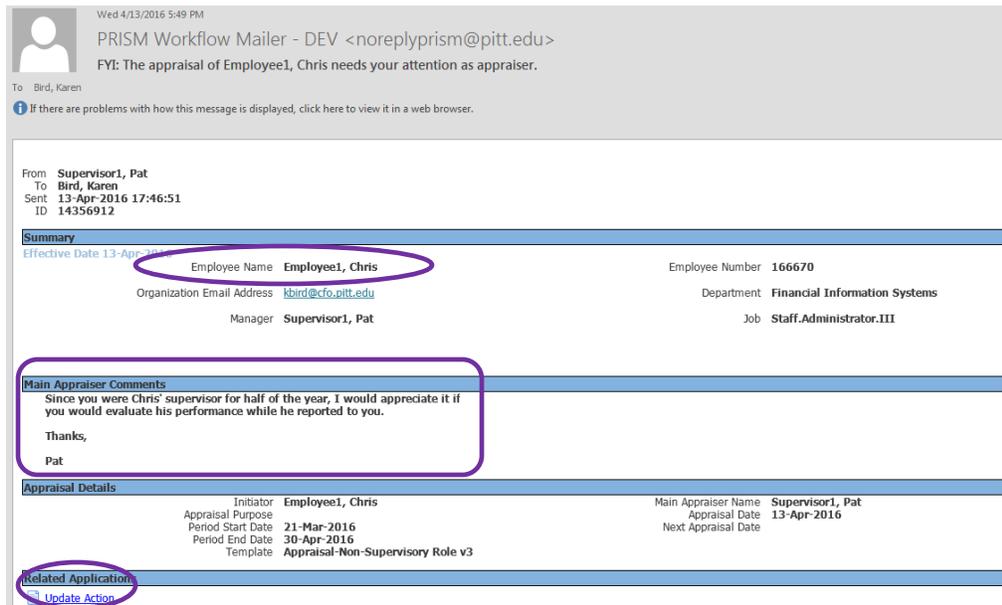


NOTE: The additional appraiser should receive an email notification and a workflow notification, however the workflow notification may close automatically. The appraisal can be completed from a workflow notification in the same manner as shown below.

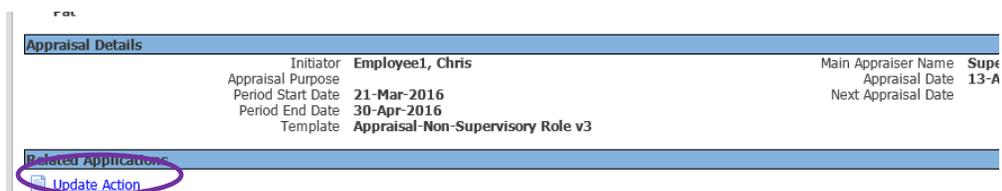
This chapter provides instructions on completing an appraisal as an additional appraiser.

Steps:

1. Open the email notification and review the details.



2. Click the *Update Action* icon in the bottom left corner to open the *Appraisal*.



Participating as an Additional Appraiser

- If prompted, log in with your University user name and password and click the *Submit* button.

University of Pittsburgh
Single Sign-On Experience

Username
abcdefg

Password

Submit

- If the following error is displayed, please contact Human Resources at 412-624-8044 and request access to Performance Management. Once access had been granted follow the instructions from Step 1 again.

Error
You have insufficient privileges for the current operation. Please contact your System Administrator.

- When the *Appraiser Details* page opens, review the details of the employee to be evaluated.

ORACLE E-Business Suite

Information
The current responsibility context has been switched to: PHR Performance Management - Supervisor

Details: Appraiser
Switch Responsibility: PHR Performance Management - Supervisor

Employee Name: Employee1, Chris
Organization Email Address: kbird@cfo.pitt.edu
Manager: Supervisor1, Pat

Employee Number: 166670
Department: Financial Information Systems
Job: Staff.Administrator.III

Setup Details

Initiator: Employee1, Chris
Appraisal Purpose: [blank]
Period Start Date: 21-Mar-2016
Period End Date: 30-Apr-2016
Template: Appraisal-Non-Supervisory Role v3

Main Appraiser: Supervisor1, Pat
Appraisal Date: 13-Apr-2016
Next Appraisal Date: [blank]

Details	Competency	Appraiser Performance Rating
Show	Core.Composure	
Show	Core.Decision Making	
Show	Core.Initiating Action	
Show	Core.Interpersonal Communication	
Show	Core.Job Knowledge/Functional and Technical Skills	
Show	Core.Organizing and Planning	
Show	Core.Quality of Work	
Show	Core.Service Orientation	
Show	Core.Work Habits	

Overall Feedback

Comments

About this Page
Copyright (c) 2006, Oracle. All rights reserved.

Participating as an Additional Appraiser

- Click the *Update* button to complete the appraisal.



- The *Appraiser Appraisal Feedback* page will open. Click the *Update Details* icon beside the first competency.

The screenshot displays the Oracle E-Business Suite interface for the 'Appraisal Feedback: Appraiser' page. At the top, there is a navigation bar with 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help Page'. Below the navigation bar, there are buttons for 'Cancel', 'Save as Draft', and 'Complete'. The page is divided into several sections:

- Employee Information:** Employee Name: Employee1, Chris; Organization Email Address: kbird@cfo.pitt.edu; Employee Number: 166670; Department: Financial Information Systems; Manager: Supervisor1, Pat; Job: Staff.Administrator.III.
- Setup Details:** Initiator: Employee1, Chris; Main Appraiser: Supervisor1, Pat; Appraisal Purpose: (blank); Appraisal Date: 13-Apr-2016; Period Start Date: 21-Mar-2016; Next Appraisal Date: (blank); Period End Date: 30-Apr-2016; Template: Appraisal-Non-Supervisory Role v3.
- Competencies Table:** A table with three columns: Competency, Appraiser Performance Rating, and Update Details. The 'Update Details' column contains yellow pencil icons, with the top one circled in purple.
- Overall Feedback:** A section with a text area for comments. The text above the area reads: "The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion." Below the text area are buttons for 'Cancel', 'Save as Draft', and 'Complete'.

At the bottom of the page, there is a footer with 'About this Page', 'Home Logout Preferences Help Personalize Page', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Participating as an Additional Appraiser

- The *Competencies Details* page will open. View the behavioral indicators for the selected competency. Performance under each of these should be considered when determining a rating for the competency. Descriptions of the ratings are shown on the lower right.

Competency Details

Cancel Save as Draft Apply and Update Next Apply

Competency: Core.Composure

Behavioral Indicator

Behavioral Factors for Composure:

- Maintains effective performance under pressure.
- Copes effectively and develops effective approaches to deal with pressure or stress.
- Presents a positive disposition and maintains constructive interpersonal relationships when under stress.

Rate Appraisee On This Competency

Consider the Behavioral Factors listed above when determining the Performance Rating for this competency. Examples should be included in the *Comments* box.

Examples **MUST** be included in the *Comments* box if the Performance Rating is "Unsatisfactory" or "Needs Development."

Competency Name: Core.Composure

Performance Rating:

Comments:

Performance Rating Scale

Step Value	Rating Scale	Behavioral Indicator
1	Unsatisfactory	Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).
2	Needs Development	Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months).

- Select the rating for the competency from the drop-down list in the *Performance Rating* field.

Competency Name: Core.Composure

Performance Rating:

Comments:

1-Unsatisfactory
2-Needs Development
3-Successful
4-Above Expectations
5-Exceptional

Hide

Performance Rating Scale

Step Value	Rating Scale	Behavioral Indicator
1	Unsatisfactory	Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).

Participating as an Additional Appraiser

10. In the *Comments* box enter examples to support the performance rating.

The screenshot shows the 'Competency Details' form for 'Core.Composeure'. At the top, there are buttons for 'Cancel', 'Save as Draft', 'Apply and Update Next', and 'Apply'. Below this, the competency name is 'Core.Composeure' and the behavioral indicator is 'Behavioral Indicator'. A section titled 'Behavioral Factors for Composure:' lists three bullet points: 'Maintains effective performance under pressure.', 'Copes effectively and develops effective approaches to deal with pressure or stress.', and 'Presents a positive disposition and maintains constructive interpersonal relationships when under stress.' Below this is a blue header 'Rate Appraisee On This Competency'. A text block instructs the user to 'Consider the Behavioral Factors listed above when determining the Performance Rating for this competency. Examples should be included in the Comments box.' and 'Examples MUST be included in the Comments box if the Performance Rating is "Unsatisfactory" or "Needs Development."'. The 'Competency Name' is 'Core.Composeure' and the 'Performance Rating' is '3-Successful'. A 'Comments' box contains the text: 'Chris managed one of the bigger project initiatives during this period. The project had a very aggressive schedule and faces a number of serious road blocks. During the course of the project, Chris was always profession and did not take his stress out on his coworkers or team members.' To the right, a 'Performance Rating Scale' table is visible.

Step Value	Rating Scale	Behavioral Indicator
1	Unsatisfactory	Employee must demonstrate improved work performance

11. When finished rating this competency, click the *Apply and Update Next* button to rate the next competency.

This image is a close-up of the 'Competency Details' form, focusing on the buttons at the top: 'Cancel', 'Save as Draft', 'Apply and Update Next', and 'Apply'. The 'Apply and Update Next' button is circled in purple.

12. Continue rating the competencies. When the page displays the last competency on the list, the *Apply and Update Next* button will disappear and only the *Apply* button will be displayed. Click the *Apply* button to return to the prior page.

The screenshot shows the 'Competency Details' form for 'Core.Work Habits'. At the top, there are buttons for 'Cancel', 'Save as Draft', and 'Apply'. The 'Apply' button is circled in purple. Below this, the competency name is 'Core.Work Habits' and the behavioral indicator is 'Behavioral Indicator'. A section titled 'Behavioral Factors for Work Habits:' lists two bullet points: 'Conducts work within the established (and accepted) department practices.' and 'Conducts work according to the established and approved work schedule.'

Participating as an Additional Appraiser

13. At any point, the *Save as Draft* button can be used to save the work for later.
14. After clicking the *Apply* button, the *Appraisal Feedback* page will open showing the performance rating for each competency. Click the *Update Details* icon again to make any adjustments.

ORACLE E-Business Suite
 Personalize

[Home](#)
[Logout](#)
[Preferences](#)
[Help Page](#)

[Navigator](#)
[Favorites](#)

Details: Appraiser >
Appraisal Feedback: Appraiser

Cancel Save as Draft Complete

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Setup Details

Initiator	Employee1, Chris	Main Appraiser	Supervisor1, Pat
Appraisal Purpose		Appraisal Date	13-Apr-2016
Period Start Date	21-Mar-2016	Next Appraisal Date	
Period End Date	30-Apr-2016		
Template	Appraisal-Non-Supervisory Role v3		

Competencies

Competency	Appraiser Performance Rating	Update Details
Core.Composure	3-Successful	
Core.Decision Making	3-Successful	
Core.Initiating Action	4-Above Expectations	
Core.Interpersonal Communication	3-Successful	
Core.Job Knowledge/Functional and Technical Skills	3-Successful	
Core.Organizing and Planning	3-Successful	
Core.Quality of Work	3-Successful	
Core.Service Orientation	3-Successful	
Core.Work Habits	3-Successful	

Overall Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments

Cancel Save as Draft Complete

About this Page

[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)
[Personalize Page](#)

Copyright (c) 2006, Oracle. All rights reserved.

Participating as an Additional Appraiser

15. If desired, enter summary text in the *Comments* box of the *Overall Feedback* section. The supervisor, as the main appraiser, can decide whether or not to allow the employee to view the text entered in the *Comments* box.

Overall Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments: In summary, Chris very successfully completed all aspects of his job while working for me and in some cases exceeded my expectations.

16. When finished with the appraisal, click the *Complete* button to finalize the review.
17. If desired, enter a message to the supervisor in the *Notification Comments* box. Text entered here is only for the workflow/email notification and does not become part of the appraisal.

ORACLE® E-Business Suite

Personalize
Home Logout Preferences Help Page

Appraisal Feedback: Complete

Once you click Submit, you cannot make further changes unless the main appraiser requests for feedback.

Notification Comments: I have completed my review of Chris' performance. Please let me know if you need any clarification or additional information. Regards, BB

NOTE: Once the *Submit* button is pressed, no further changes can be made to the appraisal unless the supervisor requests additional feedback.

18. Click the *Submit* button to return the appraisal to the supervisor.

ORACLE® E-Business Suite

Personalize
Home Logout Preferences Help Page

Appraisal Feedback: Complete

Once you click Submit, you cannot make further changes unless the main appraiser requests for feedback.

Notification Comments: I have completed my review of Chris' performance. Please let me know if you need any clarification or additional information. Regards, BB

19. Once the *Submit* button is clicked, work as an additional appraiser is complete.

Participating as an Additional Reviewer

Participating as an Additional Reviewer

As main appraiser, an employee's supervisor can request that an additional person(s) provide feedback about the employee's performance. The additional reviewer could be a co-worker or someone who worked with the employee on a project or on a particular task.

When the supervisor requests feedback from an additional reviewer, the additional reviewer will receive an email notification requesting their participation.

PRISM Workflow... FYI: The appraisal of Employee1, Chris needs your attention as reviewer.
From Supervisor1, Pat To Employee2, Robin

NOTE: The additional reviewer should receive an email notification and a workflow notification, however the workflow notification may close automatically. The appraisal can be completed from a workflow notification in the same manner as shown below.

This chapter provides instructions on providing feedback as an additional reviewer.

Steps:

1. Open the email notification and review the details.

Thu 4/14/2016 12:07 PM
PRISM Workflow Mailer - DEV <noreplyprism@pitt.edu>
FYI: The appraisal of Employee1, Chris needs your attention as reviewer.
To: Bird, Karen
If there are problems with how this message is displayed, click here to view it in a web browser.

Action Items Get more ap

From: Supervisor1, Pat
To: Employee2, Robin
Sent: 14-Apr-2016 12:05:52
ID: 14356988

Summary
Effective Date 13-Apr-2016
Employee Name Employee1, Chris Employee Number 166670
Organization Email Address kbird@cfb.pitt.edu Department Financial Information Systems
Manager Supervisor1, Pat Job Staff.Administrator.III

Main Appraiser Comments
Please provide your thoughts on working with Chris on the QTAC project as it relates to the competencies list on the appraisal form.
Thank you,
Pat

Appraisal Details
Initiator Employee1, Chris Main Appraiser Name Supervisor1, Pat
Appraisal Purpose Appraisal Purpose Appraisal Date 13-Apr-2016
Period Start Date 21-Mar-2016 Next Appraisal Date
Period End Date 30-Apr-2016
Template Appraisal-Non-Supervisory Role v3

Related Applications
Update Action

2. Click the *Update Action* icon in the bottom left corner to open the Appraisal.

Appraisal Details
Initiator Employee1, Chris Main Appraiser Name Supervisor1, Pat
Appraisal Purpose Appraisal Purpose Appraisal Date 13-Apr-2016
Period Start Date 21-Mar-2016 Next Appraisal Date
Period End Date 30-Apr-2016
Template Appraisal-Non-Supervisory Role v3

Related Applications
Update Action

Participating as an Additional Reviewer

3. If prompted, log in with your University user name and password and click the *Submit* button.

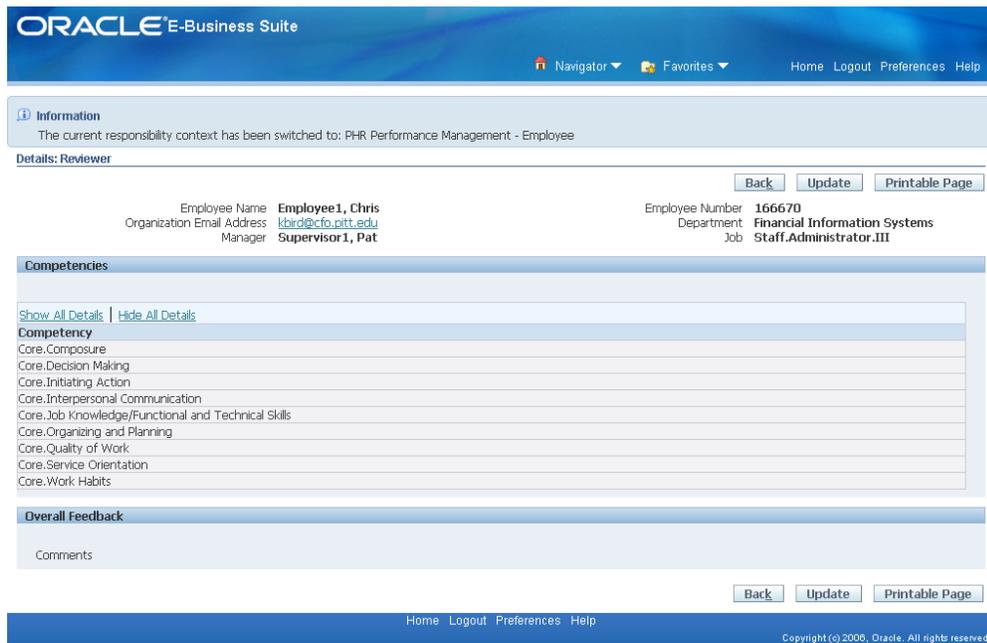


The image shows a login form for the University of Pittsburgh. At the top left is the University of Pittsburgh logo. To its right, the text "University of Pittsburgh" is displayed. Further right, the text "Single Sign-On Experience" is visible. Below this, there are two input fields: "Username" with the text "abcdefg" and "Password" with "*****". At the bottom of the form is a "Submit" button, which is circled in purple.

4. If the following error is displayed, please contact Human Resources at 412-624-8044 and request access to Performance Management. Once access had been granted follow the instructions from Step 1 again.

Error
You have insufficient privileges for the current operation. Please contact your System Administrator.

5. When the *Reviewer Details* page opens, review the details of the employee to be reviewed.



The image shows the Oracle E-Business Suite interface. At the top is the "ORACLE E-Business Suite" header. Below it are navigation links: "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". A message box states: "Information: The current responsibility context has been switched to: PHR Performance Management - Employee". Below this is the "Details: Reviewer" section. It includes buttons for "Back", "Update", and "Printable Page". The employee details are as follows:

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Below the details is the "Competencies" section, which has a table with columns for "Competency" and "Rating". The table lists various competencies such as "Core.Composure", "Core.Decision Making", "Core.Initiating Action", "Core.Interpersonal Communication", "Core.Job Knowledge/Functional and Technical Skills", "Core.Organizing and Planning", "Core.Quality of Work", "Core.Service Orientation", and "Core.Work Habits". Below the table are "Show All Details" and "Hide All Details" links. At the bottom of the page is the "Overall Feedback" section with a "Comments" field. At the very bottom are navigation links: "Home", "Logout", "Preferences", "Help", and "Copyright (c) 2006, Oracle. All rights reserved."

Participating as an Additional Reviewer

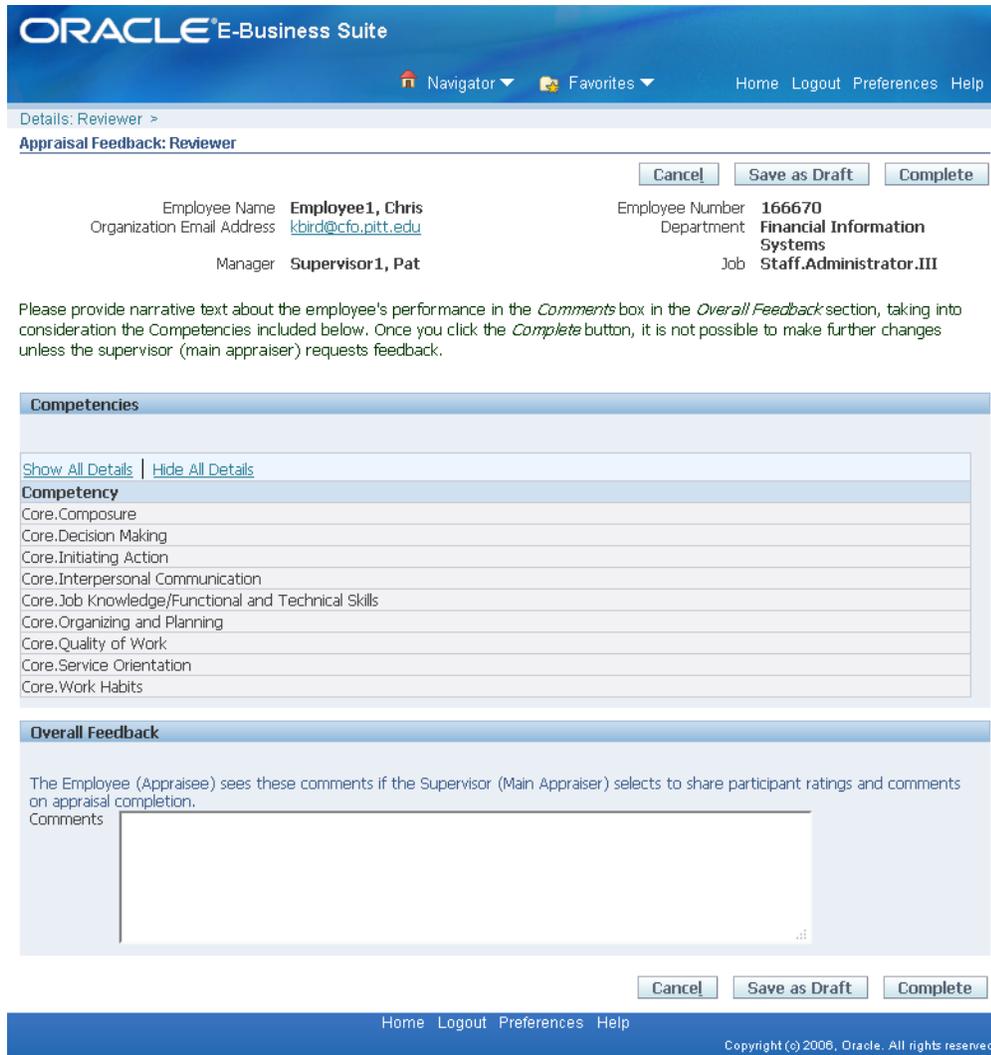
- Click the *Update* button to complete the review.



Details: Reviewer

Back Update

- The *Reviewer Feedback* page will open. Provide narrative text about the employee's performance in the *Comments* box in the *Overall Feedback* section, taking into consideration the competencies included below.



ORACLE® E-Business Suite

Navigator Favorites Home Logout Preferences Help

Details: Reviewer >

Appraisal Feedback: Reviewer

Cancel Save as Draft Complete

Employee Name	Employee1, Chris	Employee Number	166670
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Please provide narrative text about the employee's performance in the *Comments* box in the *Overall Feedback* section, taking into consideration the Competencies included below. Once you click the *Complete* button, it is not possible to make further changes unless the supervisor (main appraiser) requests feedback.

Competencies

Show All Details | Hide All Details

Competency

- Core.Composure
- Core.Decision Making
- Core.Initiating Action
- Core.Interpersonal Communication
- Core.Job Knowledge/Functional and Technical Skills
- Core.Organizing and Planning
- Core.Quality of Work
- Core.Service Orientation
- Core.Work Habits

Overall Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments

Cancel Save as Draft Complete

Home Logout Preferences Help

Copyright (c) 2006, Oracle. All rights reserved.

Participating as an Additional Reviewer

- After the review is completed, click the *Complete* button to finalize the review.

Overall Feedback

The Employee (Appraisee) sees these comments if the Supervisor (Main Appraiser) selects to share participant ratings and comments on appraisal completion.

Comments: On our project, Chris was very organized and communicated expectations and project goals and deadlines clearly. Chris worked hard to clear obstacles and keep the project moving. I would be happy to work on another project in the future. Regards, Robin

Cancel Save as Draft **Complete**

- To finish the review later, click the *Save as Draft* button.
- If desired, enter a message to the supervisor in the *Notification Comments* box. Text entered here is only for the workflow/email notification and does not become a permanent part of the appraisal.

ORACLE E-Business Suite

Navigator Favorites Home Logout Preferences Help

Appraisal Feedback: Complete

Once you click Submit, you cannot make further changes unless the main appraiser requests for feedback.

Cancel Submit

Notification Comments: I have completed the review of Chris. Please let me know if you would like any additional information. Regards, Robin

NOTE: Once the *Submit* button is pressed, no further changes can be made to the appraisal unless the supervisor requests additional feedback.

- Click the *Submit* button to return the appraisal to the supervisor.

ORACLE E-Business Suite

Navigator Favorites Home Logout Preferences Help

Appraisal Feedback: Complete

Once you click Submit, you cannot make further changes unless the main appraiser requests for feedback.

Cancel **Submit**

Notification Comments: I have completed the review of Chris. Please let me know if you would like any additional information. Regards, Robin

- Once the *Submit* button is clicked, work as an additional reviewer is complete.