# Performance Management On-Line

Supervisor's Guide

# Table of Contents

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

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

### 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

#### 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*.

ORACLE <sup>®</sup> E-Business Suite					
	🙀 Favorites 🔻		Logout	Preferen	ces Help
Enterprise Search All		Go	Sea	rch Resul	ts Display Pr
Oracle Applications Home Page			Logged	l In As El	MPLOYEE1
Main Menu	Worklist				
Personalize				Ful	List
PHR Employee Self-Service	From	Туре	Subject	Sent	Due
HR Performance Management - Employee      All Actions Awaiting Your Attention     Personal Actions     Performance Management     Performance Management      Performance Management	There are no notifications in this view. TIP <u>Vacation Rules</u> - Redirect or auto-respond to TIP <u>Worklist Access</u> - Specify which users can view PRISM TRKS USERS: Approved timecards are Monday.	notifica w and a e <b>due t</b>	utions. act upon yo <b>pefore no</b>	our notific <b>on on</b>	cations.

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

ORACLE <sup>®</sup> PHR Performance Management - Employee								
		🔒 Nav	vigator 🔻 🛛	🤰 Favorites	s 🕶 Home Lo	gout Preferences Help		
Appraisals Performance Management								
					Logge	d In As Employee1, Chris		
On this page, you can access your development fun notification messages.	octions and	view Perform	ance manage	ement	Help			
Performance Management Task List					Plan	Click to Access Help Documents		
Expand All Collapse All					Fiscal 2016 Non-Supervisory			
♥								
Focus Task	Process	Start Date	End Date	Go to Task	Click <u>here</u> to access Management website	the Performance e.		
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 Ef	fective Date	Update	Delete				

## 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.

Appraisals				Navigator	🔻 🙀 Favorite	s 🔻 🛛 H	ome Logout P	references
rippruisuis	Performance M	anagement						
a			6 H 1 H	. (			Logged In As	Employe
On this page, notification m	you can access y essages.	our development	t functions and view	Performance n	nanagement	Help		
Performance	ce Management	Task List					Click t	to Access
Expand All						Fiscal 2016	D	ocuments
	CONADSE AN					Non-Supervis	sory	
₩								
Focus Task			Process Sta	rt Date End D	Go to ate Task	Management	o access the Per t website.	formance
E Fisc	al 2016 Non-Sup	ervisory	21-	Mar-2016 16-Ap	r-2016	managemen		
	Manage appraisal:	Appraisal-	Appraisal 21-	Mar-2016 16-Ap	r-2016			
	Ion-Supervisory R	ole v3						
Notification	ns Awaiting You	r Attention						
Subject	Sent N	ame Departme	ent Job Effect	ive Date Up	odate Delete			
NO RESULTS TOU	ina.							
Appraisals F	Performance Ma	nagement		1 Navigator	▼ 🙀 Favorite	s▼ H	ome Logout P	Preference
Appraisals F My Appraisals	Performance Ma	nagement		1 Navigator *	▼ 🙀 Favorite	s ▼ H Selected F	ome Logout P Plan Is Fiscal 24	Preference: 016 Non-S
Appraisals F My Appraisals My Appraisals	Performance Ma	nagement		n Navigator	▼ 😝 Favorite	s ▼ H Selected F	ome Logout P Plan Is Fiscal 20	Preference: 016 Non-S
Appraisals F My Appraisals My Appraisals	Performance Ma	nagement		n Navigator Y	▼ 🕞 Favórite:	s ▼ H Selected F	ome Logout P Plan Is Fiscal 20	Preferences 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o	Performance Ma	nagement		n Navigator Y	✓ November Pavorite	s ▼ H Selected F	ome Logout P Plan Is Fiscal 24	Preference: 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o	Performance Ma	nagement		n Navigator	✓ November Pavorite	s ▼ H Selected F	ome Logout P Plan Is Fiscal 24	Preference: 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o	Performance Ma Performance Ma Participant f Employee1, Cl Appraisal Date	nagement hris	Appraisal	n Navigator Y	Eavorite     Favorite     View Appraisal     Foodh	s	ome Logout P Plan Is Fiscal 24 Update Print Solf-An	Preferences 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1.	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016	nagement	Appraisal Purpose	Navigator      Status     Planned	<ul> <li>Favorite</li> <li>View Appraisal Feedb</li> </ul>	s	ome Logout P Plan Is Fiscal 24 Update Print Self-App	Preference: 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016	hris Supervisor Supervisor1, Pat	Appraisal Purpose	Navigator      Navigator      Status     Planned	✓ New Appraisal Feedb	s	ome Logout P Plan Is Fiscal 24 Print Self-App	Preference: 016 Non-S praisal
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris	Performance Ma Participant  f Employee1, C  Appraisal Date  21-Mar-2016	nagement hris Supervisor Supervisor1, Pat	Appraisal Purpose	n     Navigator Y       Status       Planned	<ul> <li>Favorite</li> <li>View Appraisal Feedb</li> </ul>	s	ome Logout P Plan Is Fiscal 20 Update Print Self-App	Preference: 016 Non-S praisal
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016  Appraisals	nagement hris Supervisor Supervisor1, Pat	Appraisal Purpose	Ravigator Y       Status       Planned	✓ New Appraisal Feedb	s	ome Logout P Plan Is Fiscal 24 Print Self-App	Preference: 016 Non-S praisal
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016  Appraisals	nagement hris Supervisor Supervisor1, Pat	Appraisal Purpose	Ravigator Y       Status       Planned	✓ New Appraisal Feedb	s	ome Logout P Plan Is Fiscal 24 Print Self-App	reference: 016 Non-S
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016  Appraisals search is case inse	nagement hris Supervisor Supervisor1, Pat	Appraisal Purpose	Ravigator Y       Status       Planned	<ul> <li>✓ Appraisal Feedb</li> </ul>	s - H Selected F Details/Give ack	ome Logout P Plan Is Fiscal 21 Update Print Self-Ap	preference:
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A	Performance Ma Participant  Femployee1, Cl Appraisal Date 21-Mar-2016  Appraisals search is case inse Initiator Last Nai	nagement hris Supervisor Supervisor1, Pat ensitive me, Title, First Name	Appraisal Purpose	Ravigator Y       Status       Planned	✓ Pavorite View Appraisal Feedb Image: Contemporation of the second	s - H Selected F Details/Give ack	ome Logout P Plan Is Fiscal 24 Print Self-App	preference:
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A Note that the s	Performance Ma Performance Ma f Employee1, Cl Appraisal Date 21-Mar-2016 Appraisals search is case inse Initiator Last Nat aisal Date	nagement hris Supervisor Supervisor1, Pat ensitive me, Title, First Name	Appraisal Purpose	Ravigator V	<ul> <li>Favorite</li> <li>View Appraisal Feedb</li> <li>Image: Comparison of the sector of the sector</li></ul>	s - H Selected F Details/Give ack	ome Logout P Plan Is Fiscal 24 Update Print Self-App	preference:
Appraisals F My Appraisals My Appraisals Appraisals o Initiator Employee1, Chris Completed A Note that the s	Performance Ma Participant f Employee1, Cl Appraisal Date 21-Mar-2016 Appraisals search is case inse Initiator Last Nan (example)	nagement hris Supervisor Supervisor1, Pat ensitive ne, Title, First Name a: 21-Mar-2016) et et	Appraisal Purpose	Ravigator Y       Status       Planned	<ul> <li>✓ Appraisal Feedb</li> </ul>	s - H Selected F Details/Give ack	ome Logout P Plan Is Fiscal 24 Update Print Self-App C	preference

#### **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'.

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

#### Add an Objective and an Objective Results Rating

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)

ORACL		rformanc	e Managemen	t - Employee					
				🔒 Navigator 🔻	🙀 Favorit	es 🔻	Home Logou	t Preferences	e Help
	(								
Update Standard Appr	Over aisal: Overview	view					Review		
				Cancel Sav	ve as Draft	Share v	with Supervisor	Continu	le
Organ	Employee Na ization Email Addr Mana	me <b>Employ</b> ess <u>kbird@c</u> ger <b>Superv</b>	vee1, Chris fo.pitt.edu risor1, Pat		Employ [	ree Number Department Job	166670 Financial Inform Staff.Administr	ation System ator.III	15
The Self-Appraisal working relationsh and supervisor to l	provides you w ip with your su ook back over	vith the op pervisor. the past ar	portunity to contr The University's P nd realistically pla	ibute significantly to i erformance Appraisal n for the future.	improving l Program is	ooth your o designed	own performan to provide time	ce and your for the emp	oloyee
The Self-Appraisal found in the Quest prior to receiving y supervisor know cl respond to the que	encourages you ionnaire sectio rour performan learly what you estions complet	u to be pro on below, a ice apprais i expect of tely and ac	ud of your accom re intended to he al. An essential g each other and fe curately.	plishments and be can lp you organize your t oal of the performanc sel strongly that you ca	ndid about houghts an e appraisal an achieve	your areas d share inf meeting is your objec	s of improveme formation with s that both you stives by workin	nt. The ques your supervi and your g together.	stions isor Pleas
Objectives									
Add Objective									
Objective Name	Start Date Ta	rget Date	Date Completed	Employee Results R	ating	Duplicate	Update Details	Quick Upd	ate
No results found.		-							
Questionnaire									
	Questionnaire N	ame <b>Self-A</b>	ppraisal v2		Last Si	ubmitted On	Comple	te Questionn	aire

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

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

#### Add an Objective and an Objective Results Rating

- 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 <i>Comments</i> box.	(optional)
-----	---	------------

ORACLEPHRI	Performance Management - Emp	ployee			
	1	Vavigator 🔻	🙀 Favorites 🔻	Home Logout F	Preferences Help
O	o-			Review	
Add Objective					
* Indicates required field		Cancel	Save as Draft	Apply and Add Anot	her Apply
* Objective Name Objective 1			Complete (%)	100 💷	
Created By Employee1,	Chris		Date Completed	20-Mar-2016	
* Start Date  15-Sep-201	5				
Target Date 15-Mar-2016					
Next Review Date					
* Priority   High 💌					
Description					
Detail	Objective 1 is to modify the existing tasks and more efficient flow and faster completion of the	l forms to prov his work.	ide a		
Success Criteria	Realize a 10% improvement in effort and impr	oved performa	nce.		
Comments	Work was actually completed on 12-MAR-16 b obtain sign-off until the 20th.	out was not ab	le to		

### 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 Comments	3-Achieved More Than Expected Result  Through the elimination of unnecessary steps and	Hide     Results Rating Scale				
	automation of parts of the process a 20% improvement was achieved.	Step Value 1 2 3	Rating Scale Did Not Achieve Result Achieved Result Achieved More Than Expected Resul	Behavioral Indicator		
		Cance <u>l</u>	Save as Draft Apply and	Add Another Apply		

#### 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 selfappraisal 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).

ORAC	LE°PHR	Perform	ance Manage	ment - Employee				
				🔒 Navigator 🗸	🙀 Favorites	-	Home Logout	t Preferences Hel
		Overview					O Boviow	
Undate Standard	Appraisal: Overv	view					Review	
oputto otunutru				Cance <u>l</u> Sa	ve as Draft	Share v	vith Supervisor	<u>C</u> ontinue
0	Employe rganization Email I	ee Name <b>Em</b> Address <u>kbir</u> Manager <b>Su</b> j	ployee1, Chris rd@cfo.pitt.edu pervisor1, Pat		Employee De	e Number partment Job	166670 Financial Inforn Staff.Administr	nation Systems rator.III
The Self-Apprai working relatio employee and	isal provides y nship with yo supervisor to	ou with the our supervis look back o	e opportunity to o or. The Universit over the past and	contribute significantly cy's Performance Apprai realistically plan for the	to improving l isal Program is a future.	both you designe	r own performa d to provide tin	ance and your ne for the
The Self-Apprai questions, four supervisor prio your superviso together. Pleas	isal encourage nd in the Ques r to receiving r know clearly se respond to	es you to be stionnaire so your perfor what you the questio	e proud of your ac ection below, are rmance appraisal expect of each ot ons completely an	complishments and be intended to help you o . An essential goal of th her and feel strongly th nd accurately.	candid about organize your t he performanc hat you can ach	your are houghts e apprai nieve you	as of improven and share infor sal meeting is t ır objectives by	nent. The mation with you hat both you and working
Objectives								
Add Objective	2							$\sim$
Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	g	Dupli	cate Update Det	tails Quick Update
Objective 1	15-Sep-2015	15-Mar-2016	20-Mar-2016	3-Achieved More Than Exp	oected Result 🕕	ſ		
Questionnaire								
	Questionna	ire Name <b>Se</b>	lf-Appraisal v2		Last Sub	mitted On	Complet	te 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.

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.

ORACL		rformance M	anagement - Em	ployee			
				🔒 Navigator 🗸	😝 Favorites 🔻	Home Logout	Preferences Help
		Overview				Review	
Update Standard App	oraisal: Overview						
				Cancel Sav	ve as Draft Sha	are with Supervisor	<u>C</u> ontinue
	Employe	e Name Employe	e1, Chris		Employee Number	166670	
	Organization Email	Address kbird@cf	p.pitt.edu		Department	Financial Information	Systems
	P	Manager Supervis	sor1, Pat		Jop	Staff.Administrator.	ш
past and realistics The Self-Appraisal Questionnaire sec performance appr each other and fe Objectives	Ily plan for the l encourages yo ttion below, are raisal. An essen el strongly that	future. u to be proud o' intended to hel ttial goal of the p you can achieve	f your accomplishme p you organize your serformance apprais s your objectives by v	ents and be candid about your thoughts and share informati al meeting is that both you a working together. Please resp	r areas of improve ion with your supe nd your superviso bond to the questi	ment. The question rivisor prior to recei r know clearly what ons completely and	s, found in the ving your you expect of accurately.
Objective Name	Start Date	Target Date	Date Completed	Employee Results Rating	Duplicate	opdate Details	Ouick Update
Objective A	15-Sep-2015	15-Mar-2016		0	Ū.		23
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	 			<u></u>
Objective C	07-Nov-2015	11-Mar-2016		j)	<b>C</b>	1	<i>i</i>
Questionnaire							
Questionnaire Name Self-Appraisal v2					Last Submitted On	Complet	e Questionnaire

## 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)

2. 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.

ORACL		formance Management - I	Employee			and the second second	
			🕈 Na	vigator 🔻	🚱 Favorites 🔻	Home Logou	ut Preferences Help
	C	0 Dverview				Review	
Update Objective							
* Indicates required fie	eld			Cancel	Save as Draft	Apply and Updat	e Next Apply
* Objective Name	Objective A		C0	mplete (%)	85 1	rippi) and opdate	indice hgpij
Created By	Employee1, Chi	ris	Data	Completed			
* Start Date	15-Sep-2015		Date	completeu		<b>当</b>	
Target Date	15-Mar-2016						
Next Review Date	15-Jan-2016						
* Priority	Medium 👻						
Description	,						
	Detail	Objective A is to modify the existing more efficient flow and faster compl	tasks and forms to provide a etion of this work.				
	Success Criteria	Realize a 10% improvement in effort	and improved performance				
	Comments	As of 15-Jan-16 the project is on tra expected to finish on time.	ck per the project plan and	n. h.			

#### 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.

				📅 Navigator 🔻	🤿 Favorites 🔻	Home Logout Preferences Hel
	Overview					Review
Ipdate Objective						
Indicates required fie	eld			Cancel	Save as Draft	Apply and Update Next Apply
* Objective Name	Objective A			Complete (%)	100	Ep.1
Created By	Employee1, Chris			Date Completed	18-Mar-2016	1
* Start Date	15-Sep-2015			and completed		
Target Date	15-Mar-2016					
Next Review Date						
* Priority	Medium 💌					
Description						
a costripcion						
	Detail Objective	A is to modify the exis	ting tasks and forms to	provide a		
	more effic	ent now and faster co	impletion of this work.			
	Success Criteria Realize a 1	0% improvement in ef	ffort and improved perf	formance		

- 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)

Results Rating Comments	2-Achieved Result Metrics show a 10% improvement in effort and improved performance.	E Hide Results Ra	ting Scale		
		Step Value	Rating Scale	Behavioral Indicator	
		1	Did Not Achieve Result		
		2	Achieved Result		
		3	Achieved More Than Expected Result		
	h.				
			Cancel Save as D	Apply and Upd	ate Next Apply

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 selfappraisal 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.

ORACLE	IR Performance Manage	ment - Employee					
A COM	and the second sec	🔒 Navigator 🔻	🙀 Favorites 🔻	Hom	e Logout Pr	eference	s Help
	Overview			R	- <b>O</b> eview		
Objective Details							
* Indicates requi	red field			Cancel	Save as Dra	ift	Apply
Objective Name Objectiv Created 8y Supervi Start Date 07-Nov Target Date 11-Mar Next Review Date Priority Low	ve C sor1, Pat -2015 -2016	Complet Date Com	e (%) oleted				
Description							
Def	tail Objective C is to modify the provide a more efficient flow	existing tasks and forr and faster completion	ns to 1 of work.				
Success Crite	ria Realize 50% improvement in	effort and performan	ce.				
Commer	its						

#### 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.

Objectives Add Objective Objective Name Start Date **Employee Results Rating** Duplicate Update Details Quick Update Target Date Date Completed 2-Achieved Result Objective A 15-Sep-2015 15-Mar-2016 18-Mar-2016 1 Objective B 01-Oct-2015 30-Jan-2016 30-Jan-2016 2-Achieved Result Objective C 07-Nov-2015 11-Mar-2016 <u>(</u>) Ì

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



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.* 

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

#### Complete the Self-Appraisal Questionnaire

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.

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	l	Ø	ø,
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	l	1	<i>2</i> 5
Objective C	07-Nov-2015	11-Mar-2016		<u>D</u>	()	1	20
Questionnaire							
	Questionnair	e Name <b>Self-Ap</b>	praisal v2	Last	Submitted On	Complete	Questionnaire
				Cance! Save as Draf	ft Share	with Supervisor	Continue

## Complete the Self-Appraisal Questionnaire

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

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

	Employee		Contraction of the local division of the loc	
	🔒 Navigator 🔻	🙀 Favorites 🔻	Home Logout Preferences H	lelp
<b>Q</b>				
Answer Questionnaire			Review	
			Cance <u>l</u> App	ly
Complete the questionnaire and click Apply to submit the questionnaire.				
Describe your most significant accomplishments this past year.	This year I completed three up processing time. All three self-appraisal. I found all thr to be able to complete simil	arge projects both de ee of these projects are ree projects very challer lar work in the future.	signed to improve efficiency and speed t listed in the Objectives section of the nging but also very enjoyable and I hope	e i
Describe any barriers or challenges that impacted you in effectively completing your job responsibilities or accomplishing your goals.	Throughout the work I did who were necessary to the procedures that have been weren't viewed as importan	this past year I often h project. In some case in place for a long time t.	ad difficulty getting time with people s it was a reluctance to change and in others these projects simply	
Plassa list vour area(s) of strength and area(s) of improvement	Through the work I have do and project management sk and developed an effective	one this year I believe I kills. I learned to use Mi set of communications	have greatly improved my organizationa crosoft Project Management software for project work.	al
	I think it would be helpful to project management certific	o take some project ma cation.	anagement training and perhaps get my	(
What skills or new knowledge would you like to develop to improve your performance?				
	As mentioned above I am e projects this year.	njoying this project wo	rk and hope I will be assigned additional	d
Is there any other information you would like to share with your supervisor regarding your work performance?				

#### 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.

		0				0	
	0	verview				Review	
pdate Standard A	ppraisal: Overvie	W					
				Cancel Save as Draf	t Share w	ith Supervisor	<u>C</u> ontinue
Or	Employee ganization Email A M;	Name Employ ddress <u>kbird@c</u> anager Supervi	ee1, Chris fo.pitt.edu isor1, Pat	Emi	oloyee Number Department Job	166670 Financial Informat Staff.Administrate	ion Systems or.III
nployee and s	upervisor to lo	ok back over t	the past and realist	ically plan for the future.	n is designed '	to provide time f	orthe
he Self-Apprais uestions, foun upervisor prior our supervisor lease respond Objectives	al encourages d in the Questi to receiving yo know clearly v to the question	you to be pro onnaire sectio our performar vhat you expe ns completely	ud of your accomp on below, are inten nce appraisal. An e ct of each other an and accurately.	lishments and be candid abo ded to help you organize you ssential goal of the perform d feel strongly that you can	out your areas ir thoughts ar ance appraisa achieve your	of improvement ad share informat I meeting is that objectives by wor	The tion with you both you and rking togethe
he Self-Apprais uestions, foun upervisor prior our supervisor lease respond Objectives Add Objective	al encourages d in the Questi to receiving yo know clearly v to the question	you to be pro onnaire sectio our performan vhat you expe ns completely	ud of your accomp on below, are intend toe appraisal. An e ct of each other an and accurately.	lishments and be candid abc ded to help you organize you ssential goal of the perform d feel strongly that you can	out your areas ir thoughts ar ance appraisa achieve your	of improvement Id share informat I meeting is that objectives by wor	. The tion with you both you and rking togethe
he Self-Apprais uestions, foun upervisor prior our supervisor lease respond Objectives Add Objective bjective Name	al encourages d in the Questi to receiving y know clearly v to the question	you to be pro onnaire sectio our performar what you expe ns completely Target Date	ud of your accomp on below, are inten- nee appraisal. An e ct of each other an and accurately.	lishments and be candid abd ded to help you organize you ssential goal of the perform d feel strongly that you can Employee Results Rating	but your areas ur thoughts ar ance appraisa achieve your Duplicate	of improvement id share informat I meeting is that objectives by wor	. The tion with you both you and rking togethe Quick Updat
he Self-Apprais uestions, foun upervisor prior our supervisor lease respond Objectives Add Objective bjective Name bjective A	al encourages d in the Questi to receiving yo know clearly v to the question Start Date 15-Sep-2015	you to be pro onnaire sectio our performar what you expe ns completely Target Date 15-Mar-2016	ud of your accompl on below, are intendi- tice appraisal. An e ct of each other an and accurately. Date Completed 18-Mar-2016	ishments and be candid abd ded to help you organize you ssential goal of the perform d feel strongly that you can Employee Results Rating 2-Achieved Result	but your areas ir thoughts ar ance appraisa achieve your Duplicate	of improvement ad share informat I meeting is that I objectives by wor Update Details	. The tion with you both you and rking togethe Quick Updat
he Self-Apprais uestions, foun upervisor prior our supervisor lease respond Objectives Add Objective bjective Name bjective A bjective B	al encourages d in the Questi to receiving y know clearly v to the question Start Date 15-Sep-2015 01-Oct-2015	you to be pro- onnaire section our performan what you expense completely Target Date 15-Mar-2016 30-Jan-2016	ud of your accomplon below, are intervice appraisal. An ect of each other an and accurately.           Date Completed           18-Mar-2016           30-Jan-2016	Employee Results Rating 2-Achieved Result	but your areas in thoughts ar ance appraisa achieve your Duplicate	of improvement ed share informat I meeting is that i objectives by wor Update Details	. The tion with your both you and rking togethe Quick Updat
ne Self-Apprai uestions, foun ipervisor prioto yur supervisor ease respond Dbjectives Add Objective bjective Name bjective A ojective B ojective C	Start Date 15-Sep-2015 01-Ort-2015 07-Nov-2015	you to be pro- onnaire section our performan what you expense scompletely Target Date 15-Mar-2016 30-Jan-2016 11-Mar-2016	Date Completed 18-Mar-2016 30-Jan-2016	Employee Results Rating 2-Achieved Result () () ()	but your areas arce appraisa achieve your Duplicate	of improvement ad share informat I meeting is that objectives by wor Update Details	Quick Upda

## 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.

ORACLE <sup>®</sup> PHR Perfo	rmance Managemen	nt - Employee				
1		🔒 Navigator 🔫	🙀 Favorites 🔻	Home Logout	Preferences H	lelp
Overview	1			Review		
Update Standard Appraisal: Overview						
		Cancel Save	e as Draft Share v	with Supervisor	<u>C</u> ontinue	
Employee Name	Employee1, Chris		Employee Number	166670		
Organization Email Address	kbird@cfo.pitt.edu		Department	Financial Informat	ion Systems	
Manager	Supervisor1, Pat		Job	Staff.Administrat	or.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	l	1	23
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result 🔟		1	20
Objective C	07-Nov-2015	11-Mar-2016		<u>j</u> )		1	20
Questionnaire							
	Questionnaire	Name Self-Ap	praisal v2	Last 5	Submitted On	Complete 23-Mar-2016	Questionnaire

## 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 <sup>®</sup> PHR Performance Management -	Employee	
n Navigator ▼ 1	🙀 Favorites 🔻	Home Logout Preferences Help
Share Appraisal Details with Supervisor		
Click Submit to transfer ownership of this appraisal to your supervisor.		Cance <u>l</u> Sub <u>m</u> it
Notification Message for Supervisor		
I have completed the self-appraisal. Dlease let me know if you have an	v	
questions or need additional information.	7	
Regards, Chris		
		Cance! Sub <u>m</u> it

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)

4. 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.

ORACLE <sup>®</sup> PHR Performance Management - Employee									
			<b>f</b>	Navigator 🔻	🔒 Favorites 🔻	Home	Logout P	references	Help
Appraisals	Performance	Management							
My Appraisa	als   Participar	nt							
						Selected Plan	Is Fiscal 20	16 Non-Su	pervisor
Confirma Ownersh ownersh My Appraisa	ation ip of your apprais ip of the appraisa Is <b>: of Employee1,</b>	sal has transferr al to you and re <b>Chris</b>	ed to your main quests your inp	appraiser. You ut.	cannot update the	: appraisal again u	ntil the main	appraiser re	eturns
Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View Details/G	Appraisal ìive Feedback	Upda Print Self-	te Appraisal	
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Ongoing with Supervisor	1				
Complete	d Appraisals								

5. Logs out of PRISM.

The employee's supervisor receives email and workflow notifications saying that the employee has transferred ownership.

#### **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.

	🎴 Favorites 🔽	L	ogout Pre	eference	s Hel
terprise Search All			Go	Sea	rch Re
acle Applications Home Page		Lo	gged In A	s SUPER	RVISO
Main Manu					
	Worklist				
Personalize				Full L	ist
🕀 🗀 PHR Employee Self-Service	From	Туре	Subject	Sent	Due
Der Performance Management -	There are no notifications in this view.				
Employee	<ul> <li>TIP <u>vacation Rules</u> - Redirect of auto-tesp</li> <li>TIP <u>Worklist Access</u> - Specify which users notifications.</li> <li>PRISM TRKS USERS: Approved timecal on Monday.</li> </ul>	can vie rds are	e due be	ins. : upon y f <b>ore no</b>	our
<ul> <li></li></ul>	Favorites Personalize				
	You have not selected any favorites. Please use the "Personalize" button to set up your favorites.				

## 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.

		-										
O	ORACLE <sup>®</sup> PHR Performance Management - Supervisor											
						navigate	or 🔻 🍙 F	avorites 🔻	н	ome Logou	t Preferences	Help
Appra	isals Perf	orman	ce Mana	agement								
										Logged I	n As Supervi	sor1, P
On thi	s page, you	can acc	ess worl	ker developn	nent fund	tions and view	performance	e	Switch Ma	anager		
manag	ement notifi	cation r	nessage	s.					To perfor	m tasks as a	different mana	iger,
Perf	ormance Ma	anaden	ent Ta	sk List					select fro	m the list.		
Expan	d All Collar	ose All							Switch	n Manager	]	
¢									View E	y Reporting	g Hierarchy	
								Go to	Reports			
Focus	Task				Process	Start Date	End Date	Task	• Apprai	sal Summary		
	Fiscal 20	16 Non	-Supervi	sory		21-Mar-2016	16-Apr-2016	5				
	Mana	ge appr	aisals: A	ppraisal-	Appraisa	21-Mar-2016	16-Apr-2016		Нер			
	Non-Supervisory Role v3										Click to Acc	ess
Noti	Plan Help Documents							ents				
Notifications Awaiting four Actention			ALLEITLION					Fiscal 201	.6			
Subje	ct	Sent	Name	Departmen	nt Job	Effective Da	te Update	Delete	Non-Sup	ervisory		
No res	ults found.								-			
									Click her	e to access	the Performar	ice
									Managen	nent website		

6. The Appraisal Summary page will open.

## 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 <sup>®</sup> PHR Performance Management - Supervisor								
		🔒 Navigat	or 🔻 🙀 Favori	tes 🔻 🛛 Ho	me Logo	out Preference	is Hel	
Appraisals Perform	nance Management							
Main Appraiser								
Appraisals as Superv	isor			Selected Pl	a <b>n Is</b> Fis	scal 2016 Non⊰	Supervi	
Appraisals In Prog	ress							
Employee	Appraisal Date	Status		Appraisal Detai	ls P	rint Apprais	e	
Employee1, Chris	21-Mar-2016	Ongoing with Supe	ervisor	Ē		â 🥖		
Info Online								
Topics								
Performance Ma Performance Ma	nagement Appraise nagement FAQ	er Instructions						
Current Workers								
Completed Apprais	sals							
Filter the list of comple Employee Appraisal Date	eted appraisals using ar Last Name, Title, First Nar (example: 23-Mar-2016)	ny combination of Apprais	ee, Appraisal Date,	and Appraisal Purpo	5e.			
Employee	Appraisal Date	Period Start Date	Period End D	ate Details	Print [	Delete Jou	rnal	
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.

## **Review the Self-Appraisal**

wim Lane	Supervisor (N	lain Apprai	ser)		
ow Block	Reviews the Self-Appraisal (required)				
sk	Reviews the Completed Self-Appraisal				
10. Click the S	Show Questionr _E°PHR Performance	<i>naire</i> link to Management - Sup Navigator マ 😭 Favo	see the r pervisor	<b>ESPONSES.</b> me Logout Preferences Help	
Supervisor Review					
Organizatio	Employee Name Employee1, Chri n Email Address <u>kbird@cfo.pitt.ed</u> Manager Supervisor1, Pa	Share with Employe	Employee Number Department Job	raisal Give Final Ratings 166670 Financial Information Systems Staff.Administrator.III	
Setup Details					
Ąj	Initiator <b>Employee1, Chri</b> opraisal Purpose Status Template <b>Appraisal-Non-S</b> <b>Role v3</b>	s upervisory	Supervisor Appraisal Date Next Appraisal Date	Change Main Appraiser Supervisor1, Pat 21-Mar-2016	
Overall Rating an	d Comments				
	Overall Rating Overall Comments Employee Feedback				
Manage Participa	nts				
Eull Participant Full Partic Select Name Type No results found.	ipation Questionnaire Participat Name Status	Last ion Notified Date Date Completed (	Comments Update D	elete	
Competencies					
Show Al Detais H Details Competen Show Core.Compo Show Core.Intern Show Core.Intern Show Core.Intern Show Core.Intern Show Core.Intern Show Core.Organ Show Core.Quality Show Core.Service Show Core.Service Show Core.Work I	de Al Details CV In Making Ing Action essonal Communication owledge/Functional and Technical 2 zing and Planning of Work e Orientation Habits	5kils	Supervisor Perform	nance Rating	
Objectives	/				
Show Al Detail Hi Details, objective I B Show Objective A B Show Objective B B Show Objective C	de Al Detais           Name         Start Date         Target Date           15-Sep-2015         15-Mar-2016         01-Oct-2015         50-Jan-2016           07-Nov.2015         11-Mar-2016         11-Mar-2016	Date Completed Employ 18-Mar-2016 2-Achie 30-Jan-2016 2-Achie	<b>ree Results Rating</b> ved Result ved Result	Supervisor Results Rating	
Questionnaire: En	nployee				
Que	stionnaire Name Self-Appraisal v re	2	Last Submitted On	23-Mar-2016	
Return to Summary		Share with Employe	e Update App	raisal Give Final Ratings	
	Hom	e Logout Preferences H	Help Сору	right (c) 2008, Oracle. All rights reserved	

Copyright University of Pittsburgh. All rights reserved.

٦

## 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.

Object	tives							
Show All Details Hide All Details								
Details	<b>Objective Name</b>	Start Date	Target Date	Date Date Completed Employee Results Rating Supervisor Results I				
⊟ <u>Hide</u>	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result			
Additio	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.							
		Succe	ess Criteria R	ealize a 10% impr	ovement in effort and imp	roved performance		
		(	Comments P	roject work is con	pleted.			
		Next Re Com	view Date Priority M plete (%) 1	ledium 00				
Additio	nal Details: Empl	oyee						
Aŗ	Appraised Result Metrics show a 10% improvement in effort and improved performance.							
Additio	nal Details: Supe	ervisor						
Аррі	Appraised Result							
+ Show	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result			
⊕ <u>Show</u>	Objective C	07-Nov-2015	11-Mar-2016					

## **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: Emplo

Anonio cubiolee						
Questionnaire Name <b>Self-Appraisal v2</b> Last Submitted On <b>23-Mar-2016</b>						
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 werenýt 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.

ORACLE <sup>®</sup> PHR Performance Management - Supervisor							
	🔒 Navigator	🗸 🙀 Favorites 🔻 🛛 Ho	ome Logout Preferences Help				
Supervisor Review							
	Share v	vith Employee Update App	Give Final Ratings				
Employee Name	Employee1, Chris	Employee Number	166670				
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information				
Manager	Supervisor1, Pat	Job	Systems Staff.Administrator.III				
Setup Details							
Initiator Appraisal Purpose Status Template	Employee1, Chris Appraisal-Non-Supervisory Role v3	Supervisor Appraisal Date Next Appraisal Date	Change Main Appraiser Supervisor1, Pat 21-Mar-2016				
<b>Overall Rating and Comments</b>							
O Em;	Overall Rating verall Comments ployee 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)

2. 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.

	Management	- Supervisor		
	🏦 Navigator 🔻	😝 Favorites 🔻	Home Logout P	references Help
Supervisor Review >				
Share Appraisal Details with Appraisee				
			Cance	el Sub <u>m</u> it
Details to be Shared with Employee				
Select appraisal components completed by the supervi Competency Ratings and Comments Objective Ratings and Comments	sir (nan abyaiser)	o thare with the emp	iloyee (appraisee). Overall Rating Overall Comments	
Appraisal Ownership	$\frown$			
Select Main Appraiser Retains Ownership to continue	pdating the apprais	al.		
Employee Permissions	$\smile$			
Indicate whether the approisee can update the apprai Update Appraisal Provide Feedback on Overall Rating Sectority if you also select Overall Rating	sal, provide feedbac	k on the overall rating,	and view and add particip Participant Det	aant names. ails
Notification Message to Employee				
Enter your message, and click Submit to share the app Please complete the Questionnaire portion of the you have any problems with the form or any ques Thank you, Pat	oraisal with the empl self-appraisal. Let r stions.	oyee. ne know if i		

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

3. 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.

OR/		PHR Perfor	mance Ma	inagement	- Supervis	or			
			<b>f</b>	Navigator 🔻	🙀 Favorites	➡ Ho	me Logout	Preferences	Help
Appraisals	Performa	nce Management							
Main Appra	niser								
						Selected Pl	an Is Fisca	al 2016 Non-Su	iperviso
Confirm The app	a <mark>tion</mark> Iraisal has bee	en transferred to the	e Employee						
Appraisals a	as Superviso	r							
Appraisal	s In Progres	S							
								$\frown$	
Employee		Appraisal Date	Status			Appraisal Deta	ils Pri	nt Appraise	
Employee1,	Chris	21-Mar-2016	Transferr	ed to Employee				1	
Info Online	1								
Topics									

#### 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.

### 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

ORACLE <sup>®</sup> PHR Performance Management - Supervisor								
	<b>†</b> N	lavigator 🥆	r 🔒 Fav	orites 🔻	H	lome L	ogout Preferences Hel	
Supervisor Review								
Share with Employee Update Appraisal Give Final Ratings								
Employee Name Organization Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Employee Number 166670 Department Financial Information Systems Job Staff.Administrator.III					70 cial Information ms .Administrator.III	
Setup Details								
Initiator Appraisal Purpose Status Template	Initiator Employee1, Chris Supervisor Supervisor1, Pat Appraisal Purpose Appraisal Date 21-Mar-2016 Status Next Appraisal Date Template Appraisal-Non-Supervisory Role v3							
Overall Rating and Comments								
O Emį	Overall Rating verall Comments oloyee Feedback							
Manage Participants								
Full     Participation     Question       Select Name     Type     Name       No     results     found.	onnaire Participation Status	Last Notified Date	Date Completed	Comme	nts Update	Delete		
Competencies								

#### 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 <sup>®</sup> PHR Performance Management - Supervisor								
		🔒 Navigator 🗸	🙀 Favorites 🥆		Home	Logout	Preferenc	ces Help
Supervisor Review > Add Participant								
* Indicates required field * Participant Name * Participation Type	bird Last Name, Title, First Name Reviewer		Participation T	Ype Appraisers co objectives, co provide over Reviewers co provide com questionnair Other partic questionnair They cannot can select o appraisals on	an upda complet: all comr an view ments, es. ipants c es and e t view o ther par ly.	C te comp e question others' of but cann an comp enter ove thers ev thers ev	ancel	Apply nd nd s and etc You egree

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

				Car	nce <u>l</u> Select			
:h								
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 Full Name v bird Go								
ts								
Quick Select	Full Name	Job	Department	Business Group	Email Address			
	Bird, Birdy	Staff.Administrator.III	Financial Information Systems	Univ of Pittsburgh	kbird@cfo.pitt.edu			
	Bird, Karen	Purchaser.Purchaser.Purchaser	Financial Information Systems	Univ of Pittsburgh	kab178@pitt.edu			
	h d your item n By Full Na ts Quick Select	h d your item, select a filte n By Full Name  bi ts Quick Select Full Name Bird, Birdy Bird, Karen	h d your item, select a filter item in the pulldown list and enter a n By Full Name  bird Go ts Quick Select Full Name Job Bird, Birdy Staff.Administrator.III Bird, Karen Purchaser.Purchaser	d your item, select a filter item in the pulldown list and enter a value in the text field, the By Full Name          bird       Go         ts         Quick Select       Full Name         Bird, Birdy       Staff.Administrator.III         Bird, Birdy       Staff.Administrator.Purchaser         Financial Information Systems         Systems	Car         h         d your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go         h By       Full Name       bird       Go         ts       Select       Full Name       Job       Department       Business Group         Image: Bird, Birdy       Staff.Administrator.III       Financial Information Systems       Univ of Pittsburgh         Image: Bird, Karen       Purchaser.Purchaser       Financial Information Systems       Univ of Pittsburgh			

- 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.

Search and Select: Participant Name

#### Invite Additional Appraisers

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

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

ORACLE <sup>®</sup> PHR Performance Management - Supervisor							
		🏛 Navigator 🔻	🙀 Favorites 🔻	Home Logout Preferences Help			
Supervisor Review > Add Participant * Indicates required field				Cance! Apply			
* Participant Name * Participation Type Questionnaire Template	Bird, Karen Last Name. Title, First Name Appraiser	<u>_</u>	Participation Type ✓TIP App obje prov Revi prov que Oth que cval part	raisers can update competencies and ictives, complete questionnaires, and ride overall comments. ewers can view others' evaluations and ride comments, but cannot complete stionnaires. er participants can complete stionnaires and enter overall ments. They cannot view others uations. You can select other icipants for 360-degree appraisals only.			
	Rese	t to Default estionnaire					

- 7. The additional appraiser is added with a default Participation Status of 'Closed.'
- 8. 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									
Mana	ige Pa	rticipants								
Select	Partic	cipant Req	uest Feedback	Prevent I	Feedback	Add	Participant			
Select	Select All Select None									
					Last					
	Full	Participation	Questionnaire	Participation	Notified	Date				
Select	Name	Туре	Name	Status	Date	Completed	Comments	Update	Delete	
	Bird, Karen	Appraiser		Closed				1		
### 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.

OR/	ORACLE PHR Performance Management - Supervisor						
		1	🕇 Navigator 🔻 🛛 🙀	Favorites 🔻	Home Lo	gout Preferer	nces Help
Supervisor F	Review >						
Request Fee	edback						
					[	Cancel	Sub <u>m</u> it
Selected	Participants						
Full Name	Participation Type	Last Notified Date	Date Completed	Questionnaire Name			
Bird, Karen	Appraiser						
Notification	n Message Hi Karen, Since you appraisal ba Regards, Karen	were Chris' supervisor fo ased on the work compl	r half the year, pleas leted under your sup	e complete the performa ervision. I appreciate you	nce ur input.	ч	
						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									
					Last				
	Full	Participation	Questionnaire	Participation	Notified	Date			
Select	Name	Туре	Name	Status	Date	Completed	Comments	Update	Delete
	Bird,	Appraiser		Open	23-Mar-2016		=	1	î
	Karen								00

- 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.

### 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.

Mana	ige Pa	rticipants							
Select	Parti	cipant Req	uest Feedback	Prevent	Feedback	Add Pa	rticipant		
Select	AI	elect None							
	rII	Dauticipation	Questionnaire	Dauticipation	Last	Data			
Select	Name	Туре	Name	Status	Date	Complete	Comments	Vpdate	Delete
	Bird,	Appraiser		Completed	3-Mar-2016	23-Mar-201		0	Î
	Karen								

- 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.

### 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.

### 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.

ORACLE <sup>®</sup> PHR Performance Management - Supervisor								
	<b>1</b> N	lavigator 🔻	- 🕞 Favo	orites 🔻	H	ome L	ogout Preferences	Help
Supervisor Review								
	[	Share w	ith Employ	ee Up	date App	raisal	Give Final Rati	ngs
Employee Name Organization Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Employee Number 166670 Department Financial Infor Systems Job Staff.Administ					70 cial Information ms .Administrator.III	
Catur Dataila								
Initiator Appraisal Purpose Status Template	Employee1, Chris Appraisal-Non-Sup Role v3	ervisory		S Appr Next Appr	Supervisor aisal Date aisal Date	Ch Supe 21-M	ange Main Apprais rvisor1, Pat ar-2016	ær
<b>Overall Rating and Comments</b>								
O Emp	Overall Rating verall Comments oloyee Feedback							
Manage Participants								
Add Participant Full Participation Questic Select Name Type Name	nnaire Participation Status	Last Notified I Date	Date Completed	Comments	Update [	Delete		
found.								
Competencies								

### 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 <sup>®</sup> PHR Performance Management - Supervisor						
	🛱 Navigator 🔫	🙀 Favorites 🔻	Home Logout Preferences Help			
Supervisor Review >						
Add Participant						
* Indicates required field			Cance <u>l</u> Apply			
* Participant Name Last Name, Tirle, First Name * Participation Type Reviewer		Participation Type ✓TIP • App obje prov • Revi prov que • Oth que The can app	a praisers can update competencies and ectives, complete questionnaires, and vide comments. iewers can view others' evaluations and vide comments, but cannot complete estionnaires. her participants can complete estionnaires and enter overall comments. ey cannot view others evaluations. You select other participants for 360-degree raisals only.			

3. Click the *Quick Select* icon beside the appropriate person's name. Search and Select: Participant Name

					C	Cance <u>l</u> Select
Searc	h					
To fin Search	d your item n By Full Na	, select a filte ame 💌 bi	r item in the pulldown list and enter rd Go	r a value in the text field, t	hen select the "	Go" button.
Resul	6					
Select	Quick Select	Full Name	Job	Department	Business Group	Email Address
0		Bird, Birdy	Staff.Administrator.III	Financial Information Systems	Univ of Pittsburgh	kbird@cfo.pitt.edu
O		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.

### 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.

	ent - Supervisor
n Navigator	▼ 🎅 Favorites ▼ Home Logout Preferences Help
Supervisor Review > Add Participant	
* Indicates required field	Cance <u>i</u> Apply
* Participant Name Employee12, Anthony Last Name, Title, First Name * Participation Type Reviewer	<ul> <li>Participation Type         <ul> <li>Appraisers can update competencies and objectives, complete questionnaires, and provide overall comments.</li> <li>Reviewers can view others' evaluations and provide comments, but cannot complete questionnaires.</li> <li>Other participants can complete questionnaires. They cannot view others evaluations. You can select other participants for 360-degree appraisals only.</li> </ul> </li> </ul>

- 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.

Manage Participants									
Calar	Daubicinand	Description		warraw to Canadh		d Daubiaiaaa			
Selec	Participant	Request F	eedback	revent reedb	ack A0	id Participar			
Select	All Select N	lone							
					Last				
0-1	C. II North	Participation	Questionnaire	Participation	Notified	Date	0		Delete
Select	Full Name	туре	Name	Status	Date	Completed	Comments	update	Delete
	Bird, Karen	Appraiser		Completed	23-Mar-2016	23-Mar-2016	Ē	1	Î
	Employee12,	Reviewer		Closed				1	Î

### 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.

ORACL		rmance Manag	gement - Sup	pervisor			
		🔒 Nav	vigator 🔻 🛛 🥁 F	avorites 🔻	Home Logou	t Preferences I	lelp
Supervisor Review >							
Request Feedback							
					Ca	ance <u>l</u> Sub <u>n</u>	nit
Selected Participan	ts						
Full Name	Participation Type	Last Notified Date	Date Completed	Questionnaire Nam	e		
Employee12, Anthony	Reviewer						
Notification Message	Hi Anthony, Please provide feed year. Thank you, Pat	lback about Chris' per	formance as part o	of the QTK Team earli	er in the		

- 9. Click the *Submit* button.
- 10. After the request is submitted, the Participation Status will change to "Open".



- 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.

### 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.

### 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.



### Appraise Performance

	anc	Supervis		ain Appra	liser)				
v Bl	Block Appraises Performance								
	Completes the Per				ance Anni	aisal	(ontio	nal)	
•	completes the renormance Appraisa (optional)								
3.	The Upda	te Apprais	al pag	e will ope	en.				
-	ORACI								
							Langert Destau		
	Supervisor Review >			II Navigator	• M ravontes •	Home	Logout Prefere	inces meip	
	Update Appraisal								
	Organiza	Employee Name Emplo ition Email Address Manager Super	oyee1, Chris Ocfo.pitt.edu rvisor1, Pat		Employee Num Departm	ber 166670 ent Financial Job Staff.Ad	ave as Draft Information S ministrator.III	Apply	
	Competencies								
	This performance app the employee and his appraisal session, tim against previous expe In evaluating an emplo	praisal process is designed /her supervisor plan toget le is set aside to: 1) Resta cctations; and 3) Discuss fu oyee's performance, you a	d to evaluate an e ther to build on st te expectations a uture developme are to identify str	employee's performanc trengths and develop th about job responsibilitie nt opportunities and rel rengths and areas of pe	e over a specified period lose areas needing improv s and performance standa ate them to organizationa rformance which require	of time. When vement. During ards; 2) Evalua I needs. improvement.	the process wor the performan te job performa You are asked t	rks well, ce once to provide	
	observations are perr	nissible if you have verified	d the information	s you give. Examples ba 1. Such examples clarify	your message.	tions work bes	t. However, sec	ond-nand	
	Each Competency is o rating for the Compet	composed of two segments ency. Examples that suppo	s: Type.Name ar ort the rating car	nd has behavioral factor In be provided by clicking	s. Consider each of the b g the <i>Update Details</i> icon a	ehavioral facto and entering th	rs when selectir em in the <i>Comr</i>	ng the ments box.	
	Competency			Supervisor P	erformance Rating	U	odate Details	Delete	
	Core.Composure			<u>0</u>				1	
	Core.Initiating Action	)		0			/	1	
	Core.Interpersonal Com	munication 🕦					1	1	
	Core.Job Knowledge/Fu	inctional and Technical Skill	s_j	<u> </u>			1	Î	
	Core.Organizing and Pla	nning		<u>i</u>			1	Î	
	Core.Quality of Work	l.		Ð			1	Î	
	Core.Service Orientation	<b>D</b>		ø			1	Î	
	Core.Work Habits			<u> </u>			1	Î	
	Add Objective Objective Details Name	Target Start Date Date	Date Completed	Employee Results Rating 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments	Delete	
	Add Objective Objective Details Name Show Objective A Show Objective B	Target           Start Date         Date           15-Sep-2015         15-Mar-2016           01-Oct-2015         30-Jan-2016	Date Completed 6 18-Mar-2016 6 30-Jan-2016	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments	Delete	
	Add Objective Objective Details Name • Show Objective A • Show Objective B • Show Objective C	Target Date           5tart Date         Date           15-Sep-2015         15-Mar-2010           01-Oct-2015         30-Jan-2010           07-Nov-2015         11-Mar-2010	Date Completed           6         18-Mar-2016           6         30-Jan-2016	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments	Delete	
	Add Objective Objective Details Hame • Show Objective A • Show Objective B • Show Objective C Objective C	Target           Start Date         Date           15-Sep-2015         15-Mar-2010           01-Oct-2015         30-Jan-2010           07-Nov-2015         11-Mar-2010	Date Completed 6 18-Mar-2016 6 30-Jan-2016 6	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments	Delete	
	Add Objective Objective Details Hame (3 Show) Objective A (3 Show) Objective B (3 Show) Objective C Questionnaire: Emplo	Target           Start Date         Date           15-Sep-2015         15-Mar-2011           01-Oct-2015         30-Jan-2016           07-How-2015         11-Mar-2011	Date           Completed           6           18-Mar-2016           6           30-Jan-2016	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments / /	Delete	
	Add Objective Objective Details Name Show Objective A Show Objective B Show Objective C Questionnaire: Empl C m Show Questionnaire	Target           Start Date         Date           15-Sep-2015         15-Mar-2010           01-Oct-2015         3-0-Jan-2010           07-Nor-2015         11-Mar-2010           oyee         Questionnaire Name	Date           Completed           6           18-Mar-2016           6           30-Jan-2016           6	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	On 23-Mar-	Update Comments / / / / 2016	Delete	
	Add Objective Objective Details Hame g Show Objective A g Show Objective B g Show Objective C Questionnaire: Empl t Show Questionnaire	Target           Start Date         Date           15-Sep-2015         15-Mar-2010           01-Oct-2015         30-Jan-2010           07-Nov-2015         11-Mar-2010           oyee	Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	On 23-Mar-	Update Comments / / / 2016	Delete	
	Add Objective Objective Details Hame Show Objectve A Show Objectve B Show Objectve C Questionnaire: Empl Show Ouestionnaire Show Ouestionnaire	Target           Start Date         Date           15-Sep-2015         15-Mar-2010           01-Oct-2015         30-Jan-2010           07-Nov-2015         11-Mar-2010           oyee	Date           Completed           6           18-Mar-2016           6           30-Jan-2016           6	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	On 23-Mar-	Update Comments / / / / 2016	Delete	
	Add Objective Objective Details Hame g Show Objective B g Show Objective B g Show Objective C Questionnaire: Empl G Show Questionnaire Feedback The Employee (Appra)	Target Start Date Date 15-Sep-2015 15-Mar-2010 01-Oct-2015 30-Jan-2010 07-Nov-2015 11-Mar-2010 oyee Questionnaire Name Self-J	Date Completed 6 18-Mar-2016 6 20-Jan-2016 6 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	Delete	
	Add Objective Objective Details Hame g Show Objective B g Show Objective B g Show Objective C Questionnaire: Empl g Show Questionnaire Feedback The Employee (Apprai Comments	Target Start Date Date 15-Sep-2015 15-Mar-2010 01-Oct-2015 30-Jan-2010 07-Nov-2015 11-Mar-2010 oyee Questionnaire Name Self-J	Date           Completed           6           0-Jan-2016           6	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	Delete	
	Add Objective Objective Details Hame g Show Objective A g Show Objective B g Show Objective C Questionnaire: Empl ( g Show Questionnaire Feedback The Employee (Apprai Comments	Target Start Date Date 15-Sep-2015 15-Mar-2010 01-Oct-2015 30-Jan-2010 07-Nov-2015 11-Mar-2010 oyce Questionnaire Name Self-/	Date Completed 6 0-94n-2016 6 0-94n-2016 6 0 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments ? ? 2016 s on appratal co	Delete	
	Add Objective Objective Details Hame g Show Objectve A g Show Objectve B g Show Objectve C Questionnaire: Empl ( g Show Questionnaire Feedback The Employee (Apprai Comments	Target Start Date Date 15-Sep-2015 15-Mar-2010 01-Oct-2015 30-Jan-2010 07-Nov-2015 11-Mar-2010 oyce Questionnaire Name Self-/	Date Completed 6 0-94n-2016 6 0-94n-2016 6 0 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating	Duplicate	Update Comments ? ? 2016	Delete	
	Add Objective Objective Details Hame g Show Objective B g Show Objective C Questionnaire: Empl Questionnaire: Empl G g Show Questionnaire: Feedback The Employee (Apprai Comments	Target Start Date Date IS-Sep-2015 IS-Mar-2010 01-Oct-2015 30-Jan-2010 07-Nov-2015 11-Mar-2010 oyee Questionnaire Name Self-/	Date Completed 6 0-94n-2016 6 0-94n-2016 6 0 7 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraser) selects	Supervisor Results Rating	Duplicate	Update Comments ? ? 2016	Delete	
	Add Objective Objective Details Hame g Show Objective A g Show Objective C Questionnaire: Empl Questionnaire: Empl () () () () () () () () () ()	Target Start Date Date Start Date Date Start Date Date Sevents Start Date Date Start Date Date Start Date Date Sevents Start Date Date Start Date Date Start Date Date Sevents Start Date Date Start Date Start Date Date Start Date Start Date Start Date Date Start Da	Date Complet 6 81-Ma-2016 6	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating Last Submitted	Duplicate	Update Comments ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	mpletion.	
	Add Objective Objective Details Hame () Show Objective B () Show Objective C Questionnaire: Empl () () Show Questionnaire Feedback The Employee (Appral Comments () Overall Rating and ()	Target Start Date Date Start Date Start Date Date Start Date Sta	Date Completed 6 184Ma-2016 6 30-3n-2016 6 30-3n-2016 6 ***********************************	Employee Results Rating 2-Achieved Result 2-Achieved Result	Supervisor Results Rating Last Submitted	Duplicate	Update Comments / / / / / / / / / / / / / / / / / / /	mpletion.	
	Add Objective Objective Details Hame () Show Objective B () Show Objective B () Show Objective C Questionnaire: Employed () Show Oussionnaire Comments Comments Overall Rating and CO Overall	See) sees these comments	Date Completed 6 18-Mar-2016 6 3-Jan-2016 6 Appraisal v2	Employee Results Rating 2-Acheved Result 2-Acheved Result (Man Appraser) selects	Supervisor Results Rating Last Submitted	Duplicate	Update Comments ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	nupletion.	
	Add Objective Objective Details Hame Galaxy Stand Show Objective B Show Objective B Show Objective C Questionnaire: Employed Show Outstionnaire Feedback The Employed (Apprai Comments Overall Rating and C Overall	See) sees these comments	Date Completed 6 1944a-2016 6 30-Jan-2016 6 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraiser) selects	Supervisor Results Rating Last Submitted to share participant rating	Duplicate	Update Comments 2016 s on appraisal co	mpleton.	
	Add Objective Objective Details Hame () Show Objective B () Show Objective C () Show Obj	See) sees these comments	Date Completed 6 Jo-Jan-2016 6 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraker) selects	Supervisor Results Rating Last Submitted to share participant rating	Duplicate	Update Comments ? ? ? 2016	mpletion.	
	Add Objective Objective Details Hame () Show Objective B () Show Objective C () Show Obj	See) sees these comments	Date Completed 6 3-Jan-2016 6 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraiser) selects	Supervisor Results Rating Last Submitted to share participant rating	Duplicate	Update Comments ? ? ? 2016	mpletion.	
	Add Objective Objective Details Hame g Show Objective B g Show Objective C Ouestionnaire: Empl C g Show Ouestionnaire Feedback The Employee (Apprai Comments Overall Rating and C Overall	See) sees these comments	Date Completed 6 18-Mar-2016 6 30-Jan-2016 6 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraiser) selects	Supervisor Results Rating Last Submitted Last Submitted	On 23-Mar-	Update Comments ? ? ? 2016	mpletion.	
	Add Objective Objective Details Hame g Show Objective B g Show Objective C Questionnaire: Empl () () () () () () () () () ()	See) sees these comments	Date Completed 6 18-Ma-2016 6 30-Jan-2016 6 4 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraiser) selects	Supervisor Results Rating Last Submitted Last Submitted	On 23-Mar-:	Update Comments 2016 s on appraisal co	mpletion.	
	Add Objective Objective Details Hame g Show Objective B g Show Objective C Questionnaire: Employed g Show Ouestionnaire Comments Overall Rating and C Overall	See) sees these comments	Date Complet (18Ma-2016 6 4 Appraisal v2	Employee Results Rating 2-Achieved Result 2-Achieved Result (Man Appraiser) selects	Supervisor Results Rating Last Submitted to share participant rating	On 23-Mar-2	Update Comments ? ? 2016 s on appraisal co	Delette	
	Add Objective Objective Details Hame (c) Show Objective B (c) Show Objective C (c) Show Objective C (c) Show Objective C (c) Show Ouestionnaire: Employee (Appraid) (c) Show Ouestionnaire Feedback The Employee (Appraid) (c) Overall Rating and C (c) Overall Rating and C	See) sees these comments	Date Completed 6   8H4r-2016 6   Adaptation of the Supervisor of the Supervisor	Employee Results Rating 2-Achieved Result 2-Achieved Result (Main Appraiser) selects	Supervisor Results Rating	Duplicate	Update Comments 2016 s on appraisal co	Delete The second seco	

Copyright University of Pittsburgh. All rights reserved.

### Appraise Performance

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

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

	gement - Supervisor		
	📅 Navigator 🔻 😝 Favorites 🔻	Home Logout Prefere	nces Help
Supervisor Review >			
Update Appraisal			
Employee Name Employee1, Chris Organization Email Address Manager Supervisor1, Pat	Employee Numb Departme Je	rancel Save as Draft er 166670 fr Financial Information Sy ob Staff.Administrator.III	Apply ystems
Competencies			
the employee and his/her supervisor plan together to build o appraisal session, time is set aside to: 1) Restate expectation against previous expectations; and 3) Discuss future develop In evaluating an employee's performance, you are to identify examples of the employee's performance to illustrate the rat observations are permissible if you have verified the informa Each Competency is composed of two segments: Type.Name rating for the Competency. Examples that support the rating	n strengths and develop those areas needing improven s about job responsibilities and performance standar ment opportunities and relate them to organizational strengths and areas of performance which require in ings you give. Examples based on your own observati tion. Such examples clarify your message. e and has behavioral factors. Consider each of the bel can be provided by clicking the Update Details icon ar	ement. During the performance (ds; 2) Evaluate job performance needs. mprovement. You are asked to ions work best. However, sec havioral factors when selection and entering them in the <i>Comm</i>	e nce o provide ond-hand g the <i>nents</i> box.
Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure 🕕	<u>_</u>		1
Core.Decision Making	D	1	Î
Core.Initiating Action 👔	D	1	Û
Core.Interpersonal Communication 👔	D	1	1
Core.Job Knowledge/Functional and Technical Skills 👔	()	/	â

(i)

(j)

(j)

(i)

Core.Organizing and Planning

Core.Quality of Work

Core.Work Habits

Core.Service Orientation

P

Þ

P

1

Î

Î

Î

Î

### 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.

of the compet	eney:				
ORACLE	PHR Performance Management	- Superviso	r		
		navigator *	🗸 🙀 Favorit	es▼ Home Logout Prefere	nces Help
Supervisor Review > Up	date Appraisal >				
Competency Details					
		Cance	Save as	Draft Apply and Update Next	A <u>p</u> ply
Competency	Core.Composure				
Behavioral Indicator					
	Behavioral Factors for Composure:				
	<ul> <li>Maintains effective performance under pres</li> <li>Conos effectively and develops effective and</li> </ul>	ssure. proachos to doa	with proceuro	or stross	
	<ul> <li>Copes effectively and develops effective ap</li> <li>Presents a positive disposition and maintair</li> </ul>	ns constructive i	nterpersonal rel	ationships when under stress.	
	· · · · · · · · · · · · · · · · · · ·				
Rate Appraisee On Thi	s Competency				
Consider the Behavio	ral Factors listed above when determining	the Performa	nce Rating for	this competency. Examples should	be
included in the Comm	ents box.		-		
Examples MUST be inc	luded in the <i>Comments</i> hoy if the Performa	ance Rating is	"Uneatiefacto	ry" or "Needs Development "	
Examples MOST De lite	dued in the comments box in the Performa	ince kacing is	Unsacistacto	ry of needs bevelopment.	
Competency Name Cor	e.Composure				
Performance Rating	•	E Hide	2		
Comments		Perfo	mance Rating	Scale	
		Step			
		Value	Rating Scale	Behavioral Indicator	
		1	Unsatisfactory	Employee must demonstrate improved	work
				3 months).	time (e.g.,
1		2	Needs	Performance standards are not fully ach	ieved:
			Development	employee needs to improve performance	e during
				the next appraisal period (e.g., 12 mon	ths).
		3	Successful	Work is fully satisfactory; employee cons	sistently
				standards. This represents the expected	d level of
				performance as established by the supe	rvisor.
		4	Above	Work is fully satisfactory and often exce	eds
			Expectations	performance standards.	
		5	Exceptional	Work performance consistently exceeds	5
				performance standards.	

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

### 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.

		Superviso	r	
		🔒 Navigator 🥆	r 🙀 Favorit	l es
Supervisor Review > Competency Details	Update Appraisal >			
Compete	ncy Core.Composure	Cancel	Save as	Draft Apply and Update Next Apply
Benavioral Indic	Behavioral Factors for Composure: Maintains effective performance under press Copes effectively and develops effective app Presents a positive disposition and maintains	sure. roaches to dea s constructive ir	with pressure terpersonal rel	or stress. ationships when under stress.
Rate Appraisee On	This Competency			
Competency Name Performance Rating Comments	Included in the Comments box if the Performan Core.Composure 3-Successful  Handles the heavy volume that flows through the	nce Rating is ' <u>Hide</u> Perfor	'Unsatisfacto mance Rating	y" or "Needs Development." Scale
	department eveny day without becoming flustered or			
	unprofessional. Is very good at handling issues and			
	unprofessional. Is very good at handling issues and emergencies that come up weekly. Is always profess and pleasant with coworkers.	ional Step Value	Rating Scale	Behavioral Indicator
	emergencies that covery good at handling issues and emergencies that come up weekly. Is always profess and pleasant with coworkers.	ional Step Value 1	Rating Scale Unsatisfactory	Behavioral Indicator Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).
	erganiser every day without becoming instantial unprofessional. Is very good at handling issues and emergencies that come up weekly. Is always profess and pleasant with coworkers.]	ional Step Value 1  2	Rating Scale Unsatisfactory Needs Development	Behavioral Indicator Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months). Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months).
	erparation of the second secon	ional Step Value 1 2 3	Rating Scale Unsatisfactory Needs Development Successful	Behavioral Indicator Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months). Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months). 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.
	eparameter of a wigood at handling issues and emergencies that come up weekly. Is always profess and pleasant with coworkers.	ional Step Value 1 2 3 3 4	Rating Scale Unsatisfactory Needs Development Successful Above Expectations	Behavioral Indicator Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months). Performance standards are not fully achieved; employee needs to improve performance during the next appraisal period (e.g., 12 months). 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. Work is fully satisfactory and often 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.

### 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.

ла <u>в</u> е.			
ORACLE <sup>®</sup> PHR Performance Management	- Supervisor		
	🔒 Navigator 🔻 😝 Favorites 🔻 🛛	Home Logout Preferen	ices Help
Supervisor Review >			
	_		
	Cancel	Save as Draft	Apply
Employee Name Employee1, Chris	Employee Number 16	6670 Jancial Information Sv	stome
Manager Supervisor1, Pat	Job St	aff.Administrator.III	seems
Competencies			
against previous expectations; and 3) Discuss future development opport In evaluating an employee's performance, you are to identify strengths examples of the employee's performance to illustrate the ratings you give observations are permissible if you have verified the information. Such of Each Competency is composed of two segments: Type.Name and has be rating for the Competency. Examples that support the rating can be pro-	tunities and relate them to organizational needs and areas of performance which require improve ve. Examples based on your own observations we examples clarify your message. ehavioral factors. Consider each of the behaviora vided by clicking the <i>Update Details</i> icon and enter	ment. You are asked to ork best. However, seco Il factors when selecting ring them in the <i>Comm</i>	provide nd-hand g the <i>ents</i> box.
Competency	Supervisor Performance Rating	Update Details	Delete
Core.Composure 🕦	3-Successful	1	Î
Core.Decision Making	3-Successful	1	Î
Core.Initiating Action	3-Successful	1	Î
Core.Interpersonal Communication 🗊	2-Needs Development	1	Î
Core.Job Knowledge/Functional and Technical Skills	3-Successful	1	Î
Core.Organizing and Planning	4-Above Expectations	1	Î
Core.Quality of Work	3-Successful	1	Î
Core.Service Orientation	3-Successful	1	Î
Core.Work Habits	J)	1	Î

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

### 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.

Objec	tives								
Add	Objective								
	Objective		Target	Date	<b>Employee Results</b>	Supervisor		Update	
Details	Name	Start Date	Date	Completed	Rating	Results Rating	Duplicate	Comments	Delete
<u> </u>	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result		l	(⁄)	Î
<u> </u>	Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result		Ē.	/	Î

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

### 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.

i a cingi		
ORACLEPH	R Performance Management - Supervisor	
	💼 Navigator 🔻 🆙 Favorites 👻	Home Logout Preferences Help
Supervisor Review > Update A	ppraisal >	
Update Objective Details		
Click Add Objective to create obj	ectives against which you measure	Apply and Update
performance. * Indicates required field	Cance <u>i</u> Draft	Next
* Objective Name Objectiv	ρÂ	Complete (%) 100 1
Created By Employe	ee1. Chris	Data Completed 18-Mar-2016
* Start Date 15-Sep-2	2015	Date completed 110 Mar 2010
Target Date 15-Mar-2	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.	
Cusses Criteria		<u>h.</u>
Success Criteria	Realize a 10% improvement in effort and improved performance	
Comments	Project work is completed.	
Deba Associate On This of t		
Rate Appraisee on This Obje	ective	

esults Rating	2-Achieved Result		😑 <u>Hide</u>		
Comments	Confirmed that the project is comp improvement in performance has b	lete and that a 10% een achieved.	Results	Rating Scale	
			Step Value	Rating Scale	Behavioral Indicator
			1	Did Not Achieve Result	
			2	Achieved Result	
			3	Achieved More Than Expected Result	

Copyright University of Pittsburgh. All rights reserved.

### Rate Objective Results

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

7. 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
<u> </u>	Objective A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieved Result	2-Achieved Result	l	1	Î
+ <u>Show</u>	Objective B	01-0ct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	2-Achieved Result	Ē	1	Î
⊕ <u>Show</u>	Objective C	07-Nov-2015	11-Mar-2016			3-Achieved More Than Expected Result	Ē	1	Î

- 8. Objectives that were not completed will be automatically moved to the next performance year as long as the *Date Completed* field is blank.
- 9. 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.
- 10. 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.

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

### Summarize Participant Input and Give Final Rating

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.



3. Enter supporting comments in the Overall Comments box.

Overall Rating and C	omments
Overall Rating Overall Comments	3-Successful 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.

### 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:

				📅 <u>Na</u>	wigator 👻 🗔	Favorites 🔻		gout Preferen	ces Help
date App	raisal								
						Cance	Sav	e as Draft	Apply
	E	Employee Nam	e Employe	e1, Chris		Employee Numb	er 16667	0	
0	irganizatio	n Email Addres	s <u>kbird@cfo</u>	.pitt.edu		Departme	Finance	ial Informatio	n
		Manage	s Supervis	or1, Pat		J	b Staff.	ns Administrator	ш.
ompeter	ncies								
his perfo rocess w mprovem nd perfor pportunit	rmance a orks well, ent. Durir rmance sl ies and re	ppraisal proc , the employe ng the perform tandards; 2) E elate them to	ess is design e and his/he nance apprai valuate job organization	ed to evalua r supervisor sal session, performance al needs.	te an employee's plan together to time is set aside against previous	performance over a s build on strengths and to: 1) Restate expecta expectations; and 3) I	pecified pe develop th tions about Discuss fut	riod of time. V ose areas nee job responsib ure developme	vhen the ding ilities int
n evaluati are asked observatio clarify you	ing an err to provid ins work l ir messag	ployee's perfi e examples of best. However je.	f the employ , second-ha	u are to iden ee's perform nd observatio	tity strengtns and ance to illustrate ons are permissib	areas of performance the ratings you give. E ble if you have verified	which rec xamples b the inform	juire improven ased on your o ation. Such ex	ient. You wwn amples
ach Com when sele and enter	petency is cting the ing them i	s composed or rating for the in the <i>Comme</i>	f two segme Competency ents box.	nts: Type.Na . Examples t	me and has beh hat support the r	avioral factors. Conside ating can be provided	er each of t by clicking	he behavioral the <i>Update De</i>	factors <i>tails</i> icon
omneten	CV.				Supervisor	Performance Rating		ndate Details	Delete
ore.Compr	osure 🕦				3-Successful	(1)	0		R
ore.Decisir	on Making	(D)			3-Successful			1	8
nre Initiati	na Action	<u>س</u>			3-Successful	20 100		-	0
vie antideli	ang Acuon	<u>لل</u>			2 March 2				
ore.Interp	ersonal Co	ommunication	Ð		2-Needs Dev	/eiopment		1	I
ore.Job Kr	nowledge/	Functional and	I Technical S	kills 🕕	3-Successful	<b>D</b>		1	Î
ore.Organi	izing and F	Planning 👔			4-Above Exp	oectations		1	Û
ore.Qualty	of Work	))			3-Successful	))		1	Û
ore.Service	e Orientat	ion 🕦			3-Successful	<u>1</u>		1	Û
ore.Work	Habits				0			1	1
Show Ob	jective A	10 000 1010					11-0		Her I
Show Ob Show Ob	ijective A ijective B ijective C	01-Oct-2015 07-Nov-2015	30-Jan-2016 11-Mar-2016	30-Jan-2016	Result 2-Achieved Result	2-Achieved Result 3-Achieved More Than Expected		1	
Show Ob Show Ob Show Ob	ijective A ijective B ijective C naire: Em	01-Oct-2015 07-Nov-2015	30-Jan-2016 11-Mar-2016	30-Jan-2016	Result 2-Achieved Result	2-Achieved Result 3-Achieved More Than Expected Result	6	1	Ŭ Û
Show Ob Show O	ijective A ijective B ijective C naire: Em Que: estionnair ivyee (App pompletion, i Receive perform project	01-Oct-2015 07-Nov-2015 07-Nov-2015 stionnaire Nam & raisee) sees th - ed input from med all of the jr imanager on the standard free jr	30-Jan-2016 11-Mar-2016 e Self-App ese commen Chris' prior su ob requirems the TVM proj	30-Jan-2016 waisal v2 ts if the Sup pervisor who ents in a profi	Result 2-Achieved Result anvisor (Main Appr gave an overall ro sessonal and comp sessonal and comp	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted ( aser) selects to share p tring of 'Satsfactory' ct etent manner. Also re	articipant r ing that Ch reverd input utions to ti	r-2016	ments on
Show Ot Show Ot Show Ot Question Show Ou Geedback	jective A jective B giective C Quee estionnair got alo got alo	01-Oct-2015 07-Nov-2015 07-Nov-2015 stonnake Nam g raisee) sees th de input from manager on to manager on to manager with t week one work	30-Jan-2016 11-Mar-2016 se Self-App tese commen Chris 'prior su ob requirema the TVM proj he rest of th hing with Chri	30-Jan-2016 rraisal v2 ts if the Sup pervisor who not sin a profile et last year e team. Office s on another	Result 2-Achieved Result ervisor (Main Appr gave an overall sessonal and comp sessonal and comp sessonal and comp result of the esp project.	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted ( alser) selects to share p trag of "Satisfactory" of elevent manner, Akor p made significant contrib tablehed deadlines and	articipant r ng that Ch seved inpu utions to ti the PM sta	atings and com rs consistently t from the he project and ted that he	ments on
Show Ot Show Ot Show Ot Question Show Ou Show Ot Show	jective A jjective B jjective C Que: estionnair vyee (App perform projection got alo got alo would	01-Oct-2015 07-Hov-2015 07-Hov-2015 stonnaire Nam g raisee) sees th 	30-Jan-2016 11-Mar-2016 e Self-App tese commen Chris prior su ob requirema the TVM proj he rest of th ing with Chri	30-Jan-2016 rraisal v2 ts if the Sup pervisor who nets in a profi	Result 2-Achieved Result envisor (Main Appr gave an overall ra ssonal and comp stating that Chris met all of the es project.	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted ( alter) selects to share p trang of "Statisfactor" (children and made significant contrib tablished deadlines and	articipant r ng that Ch eved input utions to ti the PM sta	ar-2016 atings and com rs consistently t from the he project and ted that he	ments on
Show Ot Show Ot Show Ot Question Show Question Show Questi	jective A jjective B jjective C Que: esstionnar uvyee (App pompletion projective got alo would would ating ance reral Ratin	al-oct-2015 01-Oct-2015 07-Nov-2015 or-Nov-2015 stoomaire Name al- stoomaire Name al- ed input from manager on to manager on to manager on to welcome work di Comments al- go	30-Jan-2016 11-Mar-2016 e Self-App lese commen chris' prior su ob requirem the TVM prior he rest of th ang with Chri ful	30-Jan-2016 rraisal v2 ts if the Sup pervisor who ints in a profice t last year e team. Chris is on another	Result 2-Achieved Result envisor (Man Appr gave an overall ra sessonal and comp gave an overall ra sessonal and comp rate and co	2-Achieved Result 3-Achieved More Than Espected Last Submitted ( Last Submitted ( aser) selects to share p ting of 'Satifactory' ct etent manner. Also re- tende spinfcant contrib- tablihed deadfres and	articipant rr mg that Ch mg that Ch the PM sta	r-2016	ments on
show Ot Show Ot Show Ot Question Show Ot Show	jective A jective B jective C que: estionnair gue: estionnair gue: estionnair gue: estionnair gue: project got alo would would ating and comment	al contents of the second seco	30-Jan-2016 11-Mar-2016 11-Mar-2016 e Self-App esse commen be Twit protor su ob requirem the Twit protor su the Twit protor su the comment the comment ye completing with Chri the comment ye completing the comment started on	30-Jan-2016 raisal v2 ts if the Sup pervisor who rist in a your te team. Chris s on another is from Chris <sup>®</sup> mot Chris <sup>®</sup>	Result 2-Achieved Result envisor (Main Appr gave an overall of second and comp stacking that Chris met all of the ep project.	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted ( aiser) selects to share p teng of Statisficator, also rande significant contrib tablehed deadines and nd also on my observati There have been a faw performance year to re	articipant r mg that Ch articipant r mg that c mg that c mg that Ch articipant r mg that Ch articipant	ar-2016 atings and com re constantly the project and ted that he the last sk more written comm e and will see a	ments on atths, Chris
Show Ot Show Ot Show Ot Show Ot Show Ot Show Ou Feedback The Employed Comments	jective A jective B jective C Que: esstonnar Receever your (Appp orrolation perform projection (Recever) at lang would vould ating and comment	al -Oct-2015 OT-Nov-2015 OT-Nov-2015 stonnare Name a stonnare Name stonnare Name	30-Jan-2016 e Self-App esse comment esse comment ful ful ful ful ful ful extended to comment ful ful extended to comment ful ful extended to comment ful ful extended to comment ful ful extended to comment ful ful ful ful ful ful ful ful	30-Jan-2016 vraisal V2 ts if the Supp pervise who is a profile test are the supp pervise who is a profile test are on another is in the Oracle during the Oracle during test from Christ is a profile test are the Supp pervise who is a profile the Oracle during test from Christ is a profile test from Chr	Result 2-Achieved Result envisor (Main Appr gave an overall of second and comp stating that Chris met all of the ear project.	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted ( aiser) selects to share p teng of Statisficator, also rande significant contrib tablished deadlines and ind also on my observati Three have been a fays performance year to re	articipant r ng that Ch newed input ssues with	ar-2016 atings and com reconstantly the project and ted that he the last sk mon written comm	ments on al
Show Ot Show Ot Show Ot Show Ot Show Ou Ceedback The Employments Show Ourall Ra Overall Ra	jective A jective B jective C Que: estionnar Receeve would would ating anc	al -Oct-2015 07-Nov-2015 o7-Nov-2015 stonnake Name a raisee) sees th 	all standard sta	30-Jan-2016 rraisal V2 ts if the Sup pervisor which is a profile table table. The sup- solution of the joint is from Chris <sup>®</sup> the Christer of the sup- solution of the sup- tion of the sup- tion of the sup- solution of the sup- sol	Result 2-2-Achieved Result 2-2-Achieved Result 2-2-Achieved Result 2-2-2-2-2-2-2-2-2-2-2-2-2-2-2-2-2-2-2-	2-Achieved Result 3-Achieved More Than Expected Result Last Submitted G aser) selects to share p ting of 'Satafacton' cit etent manner. Also re ting of 'Satafacton' c	articipant r ang that Ch exeed npus	r-2016 atings and com rs consistently from the te optiget and ted that he the last six mor written comm e and will see a	ments on
Show Ot Show Ot Show Ot Question Show Qu Ceedback The Employee Operating Content Overall Re Overall	jective A jective B jective C Que: Que: esstionnar esstionnar projection proj	oli - Oct-2015 oli - Oct-2015 oli - Oct-2015 oli - Oct-2015 stoonnaire Nam s stoonnaire Nam s raisee) sees th - entire all of the j raisee) sees th - entire all of the j raisee on set of the set of	ao Jan-2016 11 Mar-2016 e Self-App ese commen e ese commen the eset of the the commen the comment the comment the comment e working of the comment the comment e working of the comment the comment the comment th	30-Jan-2016 raisal V2 ts if the Sup pervisor who nush ta p a profile t tarm. Other t tarm. Other ts from Christ ts from Christ ts from Christ to most the joint th Christ Christ ty Carlos Christ th Christ Christ th Christ th Christ Christ Christ th Christ Chris	Result 2.2.Achieved Result	Achieved Result     Achieved More     Than Expected     Last Submitted (     Last Submit	articipant r mg that Ch eved inputtions to the PM state ons during subject to say	ar-2016 atings and com rs consistently c from the ne project and ted that he the last ski moro written comme e and will see a	ments on unkations al

## 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-toface performance review has been completed.

Copyright University of Pittsburgh. All rights reserved.

## 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.

ORACL	€°PHR P	erformance	Managem	ent - Supe	rvisor					
				🔒 Navi	gator 🔻	🙀 Favori	tes 🔻	Hom	ie Logout	Preferences Help
Supervisor Review										
				Shar	e with Em	ployee	Update A	ppraisal	Sub	mit for Approval
Organia	Employee Na zation Email Add Mana	ame Employee ress <u>kbird@cfo.</u> ager Superviso	1, Chris pitt.edu r1, Pat			Emp	loyee Number Department Job	16667 Finand Staff.	70 cial Inform Administr	nation Systems ator.III
Setup Details										
	Initi Appraisal Purp St Temp	ator Employee oose atus va v3	1, Chris -Non-Supervise	ory Role		/ Next /	Supervisor Appraisal Date Appraisal Date	Super 21-Ma	Change visor1, Pa ar-2016	Main Appraiser It
Overall Rating and	Comments									
		Overal Overall Cor Employee Fe	l Rating nments edback							
Manage Participan	ts									
Select Participant	Request Fee	dback Prev	ent Feedback	Add Pa	rticipant					
Select All Select No	ne									
Select Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Complete	d Comm	ents Update	Delete		
Bird, Karen	Appraiser		Completed	23-Mar-2016	23-Mar-20	16	0	Î		
Employee12, Anthony	Reviewer		Open	23-Mar-2016			] 🧷	Î		

## 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)

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

		🏛 Navigator 🔻 😪	Favorites 🔻	Home Logout Preferences Hel
Supervisor Review			<u> </u>	
		Share with Employ	yee Update Ap	praisal Submit for Approval
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

3. 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.

	t - Superviso					
	🛱 Navigator 🔻	🙀 Favorites 🔻	Home	Logout	Preference	s Help
Supervisor Review >						
Share Appraisal Details with Appraisee						
				Can	ice <u>l</u> Si	ıb <u>m</u> it
Details to be Shared with Employee						
Select appraisal components completed by the supervisor (main appraise Competency Ratings and Comments Objective Ratings and Comments	r) to share with the	employee (appraisee).	ting omments			
Appraisal Ownership						
Select Supervisor Retains Ownership to continue updating the appraisal.						
Employee Permissions						

4. 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.

## 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	
	🔒 Navigator 🔻	😝 Favorites 🔻	Home Logout Preferences Help
Supervisor Review >			
Share Appraisal Details with Appraisee			
			Cance <u>l</u> Sub <u>m</u> it
Details to be Shared with Employee			
Select appraisal components completed by the supervi Competency Ratings and Comments Objective Ratings and Comments	sor (main appraiser)	to share with the emplo	iyee (appraisee). Iverall Rating Iverall Comments
Appraisal Ownership			
Select Supervisor Retains Ownership to continue upda	ting the appraisal.		
Employee Permissions			
Indicate whether the employee (appraisee) can updat name Update Approist Provide Feedback on Overall Rating Select only if you also select Overall Rating	e the appraisal, prov	vide feedback on the ove	erall rating, and view and add participant
Notification Message to Employee			
Enter your message, and click Submit to share the app	raisal with the empl	loyee.	

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.

## 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)

7. 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.	

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

ORACL	E <sup>®</sup> PHR Performa	ance Management - Supe	ervisor				
		🔒 Navigator 🔻	🙀 Favorites 🔻	Home	Logout	Preferences	Help
Appraisals Perform	nance Management						
Main Appraiser							
		/	Sele	cted Plan I	s Fiscal	2016 Non-Su	perviso
Confirmation	been transferred to the em	nployee (appraisee)					
Appraisals as Superv	risor						
Appraisals In Prog	iress						
Employee	Appraisal Date	Status	Appraisal I	Details	Print	Appraise	
Employee1, Chris	21-Mar-2016	Transferred to Employee	Ē		÷.	0	
Info Online						$\bigcirc$	
Topics							

### **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.

ORA		PHR Perforn	nance Manage	ement - Emplo	yee				
				🏦 Navigator 🔻	🙀 Favo	ites 🔽	Home Logout	Preferences	s Help
Appraisals	Performance (	Management							
My Appraisal	ls   Participar	nt							
My Appraisals	\$					Select	ed Plan Is Fisca	il 2016 Non-S	upervis
Appraisals	of Employee1,	, Chris							
Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View A	opraisal Details Feedback	/Give Up Print Sel	date f-Appraisal	
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Transferred to Employee		Ē		•	
Completed	Appraisals								
Note that the	search is case i	insensitive							
	Initiator	Name, Title, First Nan	N 🛰						
App	raisal Date								
	(exar	mple: 25-Mar-2016)	ear						
Initiator	Appra	aisal Date I	Period Start Date	Period End	Date	Appraisal Purp	ose Deta	ils Print Pl	lan
NO results fou	ina.								

## Employee (Appraisee): Reviews On-Line Appraisal

### **Review On-Line Appraisal**

n La	ane	Emp	loyee	Apprais	see)						
/ Blo	ock Reviews On-Line Appraisal										
		loyee I	Reviews	s On-Line A	Appra	isal (requi	ired)				
1	Reviews the details of the completed appraisal.										
т.											
	1				📅 Navig	ator 🔻 🛛 I	🤪 Favorites 🔽	Home Log	gout Preferences Help		
	Details: Employe	e									
							Bac <u>k</u> Sha	re with Supervisor	Printable Page		
	Orga	Empl anization Er	oyee Name nail Address Manager	Employee1, kbird@cfo.pit Supervisor1	Chris <u>t.edu</u> , Pat		Employee Dep	Number <b>166670</b> partment Financial Job Staff.Adi	Information Systems ministrator.III		
	Overall Rating	and Com	ments								
		,									
			Overa	all Comments	Based on the co during the last s requirements. T will be working s those and will se	mments fi ix months here have with Chris ee about o	rom Uhris' prior s s, Chris is success been a few issu t during the upo getting Chris sta	supervisor and also sfully completing m les with written co coming performanc rted on PMP certifi	on my observations nost the job mmunications but I e year to remedy ication.		
					Chris has becom	e a valuab	le member of th	e team.			
			Employ	ee Feedback							
	Competencies	6									
	Show All Details	L Hide All (	Details								
	Competency	1 1000 1100					Supervisor Per	rformance Rating			
	Core Composure						3-Successful	_			
	Core.Decision Ma	aking					3-Successful				
	Core.Initiating Ad	ction					3-Successful				
	Core.Interperson	nal Commur	nication				2-Needs Develo	pment			
	Core. Job Knowle	age/Funct	ional and Teo io	Innical Skills			4 Above Expect	ations			
	Core Quality of V	anu eianni Nork	ly .				3-Successful	.duuris			
	Core.Service Orie	entation					3-Successful				
	Core.Work Habit	s									
	Objectives										
	Show All Details	Hide All (	<u>Details</u>								
	Details Objecti	ive Name	Start Date	Target Date	Date Completed	Employe	e Results Rating	Supervisor Result	ts Rating		
	🕀 Show Objectiv	ve A	15-Sep-2015	15-Mar-2016	18-Mar-2016	2-Achieve	ed Result	2-Achieved Result			
	🕂 Show Objectiv	ve B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieve	ed Result	2-Achieved Result			
	🕀 Show Objectiv	ve C	07-Nov-2015	11-Mar-2016				3-Achieved More T	han Expected Result		
	Questionnaire	e: Employe	e								
		Question	nnaire Name	Self-Apprais	sal v2		Last Subm	nitted On 23-Mar-2	2016		
	- Chow Questie	in name					2.001 0.001				
	<u> ⊕ Show Questio</u>	nnaire									
							Bac <u>k</u> Sha	re with Supervisor	Printable Page		
					Home Locowt	Proforonse	e Heln				
					Home Logout	Herenence	s help	Convright (e) 20	106 Oracle All rights reserve		
								00pyngin (0) 20	and the second second second		

Copyright University of Pittsburgh. 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)

5. 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.

	Management - Emp	oloyee	
	📅 Navigator 🔻	🧛 Favorites 🔻	Home Logout Preferences Help
Details: Employee			$\sim$
Employee Name Employee1, Organization Email Address <u>kbrd@cfo.pit</u> Manager Supervisor1	Chris <u>t.edu</u> , Pat	Back Share with Employee Number Department Job	Supervisor 166670 Financial Information Systems Staff.Administrator.III
Overall Rating and Comments			
Overall Rating Overall Comments Employee Feedback	3-Successful Based on the comment during the last six mon requirements. There he will be working with Ch those and will see abou Chris has become a valu	s from Chris' prior supervis ths, Chris is successfully co ive been a few issues with rist during the upcoming j t getting Chris started on lable member of the team.	or and also on my observations mpleting most the job written communications but I performance year to remedy PMP certification.
Competencies			
Show All Details   Hide All Details			
Competency		Supervisor Performan	ce Rating
Core.Composure		3-Successful	
Core.Decision Making		3-Successful 2. Duccessful	
Core Internersonal Communication		2-Needs Development	
Core Joh Knowledge/Eunctional 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.)

ORACLE <sup>®</sup> PHR Performance	Management - Employee
	📅 Navigator 🔻 🍖 Favorites 💌 🛛 Home Logout Preferences Help
Details: Employee	
Employee Name Employee1, Organization Email Address <u>kbird@cfo.pit</u> Manager Supervisor1	Back         Share with Supervisor         Printable Page           Chris         Employee Number         166670           t.edu         Department         Financial Information Systems           Job         Staff.Administrator.III
Overall Rating and Comments	
Overall Rating Overall Comments Employee Feedback	3-Successful 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.
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
Cause Operations and Disputies	

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 <sup>®</sup> PHR Performance Management - Employee	
🙃 Navigator 👻 🎅 Favorites 💌	Home Logout Preferences Help
Details: Employee >	
Share Appraisal Details with Supervisor	$\frown$
Click Submit to transfer ownership of this appraisal to your supervisor.	Cance <u>l</u> Sub <u>m</u> it
Feedback on Overall Rating	
Hi Pat, I have received and reviewed this year's performance appraisal. I don't have anything to add. Thanks, Chrisj  This field is disabled if the supervisor (main appraiser) does not require your feedback at this time.	

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)

5. 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.

ORACLE <sup>®</sup> PHR Performance Management - Employee									
			💼 Navigato	or 🔻 📑 Favoi	ites 🔻 🛛 Home	Logou	t Preferences He		
Appraisals	Performance	Management							
My Appraisa	<b>ls</b>   Participa	ant							
					Selected Plan Is	s Fisc	al 2016 Non-Superv		
Ownersh your supe My Appraisal Appraisals	p of your appra ervisor (main ap s of Employee1	aisal has transfe praiser) returns L <b>, Chris</b>	rred to your si s ownership of	upervisor (main ap the appraisal to y	praiser). You cannot upda ou and requests your inpu	ate the ut.	e appraisal again unti		
Initiator	Appraisal Date	Supervisor	Appraisal Purpose	Status	View Appraisal Details/Give Feedback	Print	Update Self-Appraisal		
Employee1, Chris	21-Mar-2016	Supervisor1, Pat		Ongoing with Supervisor	Ē		0		
Completed	l Appraisals	_	_	_		_	_		

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

### **Review Feedback and Submit Appraisal for Approval**

Swim Lane	Supervisor (Appraiser)
Flow Block	Reviews Feedback & Submits Appraisal for Approval
Task	<b>Reviews Employee's Feedback and Submits Appraisal for Approval</b>
	(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.

		ormance wana	gement - Su	pervisor	
		🏦 Navigator 🔻	🗛 Favorites 🔻	Home L	ogout Preferences Help
Appraisals F	erformance Managemer	nt			
Main Appraise	r				
Annraisals as (	Supervisor			Selected Plan Is	Fiscal 2016 Non-Supervise
mppi diadia da .	Supervisor				
Appraisals In	n Progress				
					$\frown$
Employee	Appraisal Date	Status		Appraisal Details	Print/Appraise
Employee1, Ch	ris 21-Mar-2016	Ongoing with Su	ipervisor		â 🥖
Info Online					
Topics					
Performan Performan	ce Management Appra ce Management FAQ	aiser Instructions			
Current Wor	kers				
Completed #	Appraisals				

### 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)

3. Review the comments in the *Feedback* box.

ORACLE®PHR	Performance Manag	ement - Supervisor	
A CONTRACT	🏦 Navigator 🔫	😝 Favorites 🔻	Home Logout Preferences Help
Supervisor Review			
	Share with En	nployee Update Ap	praisal Submit for Approval
Employee Name Organization Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Employee Nu Depart	Imber 166670 Iment Financial Information Systems Job Staff.Administrator.III
Setup Details			
Initiator Appraisal Purpose Status Template	Employee1, Chris Appraisal- Non-Supervisory Role v3	Supi Appraisa Next Appraisa	Change Main Appraiser ervisor Supervisor1, Pat I Date 21-Mar-2016
Overall Rating and Comments			
Overall Rating Overall Comments	3-Successful Based on the comments during the last six month requirements. There hav will be working with Chri those and will see about	from Chris' prior supervi ns, Chris is successfully o re been a few issues with ist during the upcoming getting Chris started o who mombar of the team	sor and also on my observations ompleting most the job n written communications but I performance year to remedy n PMP certification.
Employee Feedback	Hi Pat, I have received and revie don't have anything to a Thanks, Chris	wed this year's performa	ance appraisal. I

- 4. 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.
- 5. 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.
- 6. The *Give Final Ratings: Supervisor* page shows a summary of the performance appraisal.

### 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)

7. 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 Perform	nance Manager	ment - Supervisor			
			*	Navigator 🔻	Favorites	Home Logout Preferences Help
Give Final Ratings: Superv	visor					
Organizatio	Employee Name E n Email Address k Manager S	mployee1, Chris <u>bird@cfo.pitt.edu</u> Supervisor1, Pat			Employee Nun Departn	Cancel Save as Draft Continue nber 166670 nent Financial Information Systems Job Staff.Administrator.III
Competency Ratings						
Click Show to view the super Show All Details   Hide All C	rvisor's (main appra	aiser's), the employ	ee's (appraisee's), and	all participar	its' ratings.	
Details Competency	2.2.0000					
Show Core.Decision Makir	ng🕕					
Show Core.Initiating Actio	m					
Show Core.Interpersonal	Communication					
Show Core.Job Knowledge	e/Functional and To	echnical Skills 🕕				
Show Core.Organizing and	d Planning 🕕					
Show Core.Quality of Wor	k))					
Show Core.Service Orient	ation 🕕					
Show Core.Work Habits	)					
Objective Ratings						
Show All Details   Hide All (	Satails					
Details Objective Name	Start Date	Target Date	Date Completed	Comment	s	
Show Objective A	15-Sep-2015	15-Mar-2016	20-Mar-2016	Work was a to obtain si	actually completed on 12 gn-off until the 20th.	2-Mar-16 but was not able
Show Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016			
Show Objective C	07-Nov-2015	11-Mar-2016				
Overall Rating and Com	ments					
			_			
0	verall Rating		~			
Overa	Commencs					Ŷ
Employe	ee Feedback					
Details to be Shared wit	th Employee					
Select appraisal component	ts to share with the	appraisee when th	e appraisal is completi	e.		
		Additional Detail	<b>Is D</b> es 1gs			Overall Rating Overall Comments Participant Comments
Employee Feedback	_	_				
elect to request the appra	isee's feedback on on Overall Rating	the overall rating	when the appraisal is	complete.		
					[	Cancel Save as Draft Continue
			Home Logout Pre	ferences He	lφ	Copyright (c) 2006. Oracle: All rights reserv

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

	Additional Details		Overall Rating
	Participant Ratings		Participant Comments
Employee Feedback			
Select answerst the an	praisee's recuback on their overall rating when the appraisal	l is complete.	
Provide Feedba	ack on Overall Rating		

Copyright University of Pittsburgh. All rights reserved.

## 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.

ORACLE®PHR	Performance Mana	gement - Supervisor	
	🏦 Navigator 👻	😝 Favorites 🔻 🛛 Ho	ome Logout Preferences Help
Supervisor Review >			
Give Final Ratings: Supervisor			$\frown$
		Cancel	Save as DraftOntinue
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu	Employee Numbe Departmer	er 166670 ht Financial Information Systems
Manager	Supervisor1, Pat	Jo	b Staff.Administrator.III
Competency Ratings			
Click Show to view the supervisor's Show All Details   <u>Hide All Details</u>	(main appraiser's), the emp	oloyee's (appraisee's), and all part	ticipants' ratings.
Details Competency			Score
<u> </u>			3
<u> </u>			3
🕂 Show Core.Initiating Action 🕕			3
🛨 Show Core.Interpersonal Comm	unication <u>í</u>		3
🛨 Show Core. Job Knowledge/Fund	ctional and Technical Skills 👔	)	3.5
🕀 Show Core. Organizing and Plann	ing 🕦		3.5
⊕ Show Core.Quality of Work 🕦			3
<u>Show</u> Core.Service Orientation	D		3
Show Core. Work Habits ()			3
Objective Datings			
ubjective katings			

### 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.

	gement - Supervisor	
🉃 Navigator 🔫	🙀 Favorites 🔻 🛛 Hom	ie 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.	Cance <u>l</u> Printable Page	Back Submit
Employee Name Employee1, Chris Organization Email Address <u>kbird@cfo.pitt.edu</u>	Employee Number Department	166670 Financial Information
Manager Supervisor 1, Pat	Job	Staff.Administrator.III
Competency Ratings		
Show All Details   Hide All Details		
Details Competency		Score
<u> </u>		3
H 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
Chiertives		

### 11. Click the *Submit* button to continue.

### 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.

ORACLE <sup>®</sup> PHR Performance Management - Supervisor			
	🔒 Navigator 🗸	🙀 Favorites 🔻	Home Logout Preferences
Warning You have chosen to complete this appra You cannot update a completed appraisal. Di	<b>isal.</b> 5 you want to continue?.		
	·		<u>N</u> o <u>Y</u> es
	Home Logout Pret	ferences	Copyright (c) 2006, Oracle. All rights reserved.

- 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.

Copyright University of Pittsburgh. 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)

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			
<b>Related Applicatio</b>	ns				

- 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	and the				
		🏛 Navigator 🔻	😪 Favorites 🔻		
Appraisal for Employee1, C	hris (proposed b	y Supervisor 1, F	Pat)		
From Supervisor1, Pa To Approver1, San Sent 26-Mar-2016 1 Due 26-Mar-2017 1 ID 14350763	nt Att. n 8:00:20 8:00:20	achments		Approve Reject	Reassign
Overall Rating and Com	ments				
Overall Overall Com Appraisee Fee	Rating 3-Succe ments Based o requirer will be v those a Chris ha	essful in the commen the last six mo nents. There I working with C nd will see abc is become a va	ts from Chris' prior s nths, Chris is success nave been a few issu hrist during the upc ut getting Chris star luable member of the	upervisor and also on my ob fully completing most the jo swith written communicati oming performance year to r ted on PMP certification.	servations b ons but I emedy
	I have r don't ha Thanks, Chris	eceived and re ave anything t	viewed this year's pe o add.	rformance appraisal. I	
Advancement Potential					
F Shart-Term Wa Long-Term Wo P	teadiness Level etention Level rk Opportunity rk Opportunity otential Details				
Details Shared with App	oraisee				
	Addition Particip Particip	nal Details 🂷 ant Names ant Ratings		Overall Rating Overall Commer Participant Com	its ments
Appraisee Feedback	_		_		
Provide Feedback     Competency Ratings	on Overal Rating	3			
Total	Score			Comments	
Show All Details Hide All D	Details				
Estails Competency			Current Proficienc	y Level New Proficiency Lev	el Score 3
Show Core.Decision Making Show Core.Initiating Acti	ng 00				3
Show Core.Interpersonal	Communication				3
Show Core. Job Knowledg	ge/Functional and d Disseine	l Technical Skills			3.5
Show Core.Organizing an Show Core.Quality of Wo	a Hanning Irk				3.5
Show Core.Service Orien Show Core.Work Habits	tation				3 3
Objectives					
Total	Score			Comments	
Show All Details Hide All D	Details			commono	
Details Objective Name	Start Date 15-Sep-2015	Target Date 15-Mar-2016	Achievement Date 18-Mar-2016	Project work is completed.	2 2
<u>     Show</u> Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	Metrics show a 10% improvement in effort and performance.	2
Show Objective C	07-Nov-2015	11-Mar-2016			3
Participants					
Full Name         Par           Bird, Karen         App           Employee12, Anthony         Rew	<b>ticipation Type</b> raiser lewer	Questionnaire	Name Last Notified 23-Mar-2016 23-Mar-2016	Date Date Completed 23-Mar-2016	
Action History					
Sequence Name 1 Supervisor 2 Approver1,	, Pat Sub Sam Pen	ion Date mit 22-Mar- iding	2016 15:15:46	Notes	
Related Applications					
View Action					
Response	_				
Note					
Return to Worklist				Approve Reject I	Reassign
		Home Logou	it Preferences Help	Copyright (o) 2008, Oracle. A	ull 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.

Response		
Note		h.
<u>Return to Worklist</u>		Approve Reject Reassign
	Home Logout Preferences Help	Copyright (c) 2006, Oracle. All rights reserved.

- 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.

OR	PACLE				
A		🏛 Navigator 🔫	🙀 Favorites 🔻	Home Logout Preferences	Help
Appraisa	l for Employee1, Chris (pr	oposed by Supervisor 1, Pa	t)		
From To Sent Due ID	Supervisor1, Pat Approver1, Sam 26-Mar-2016 18:00:2 26-Mar-2017 18:00:2 14350763	Attachments 0		Approve Reject Reassig	<u>jn</u>
Overall	<b>Rating and Comments</b>				
	Overall Rating Overall Comments	3-Successful Based on the comments during the last six mont requirements. There ha will be working with Ch those and will see abour Chris has become a valu	: from Chris' prior s hs, Chris is success ve been a few issue rist during the upo t getting Chris star able member of the	upervisor and also on my observati fully completing most the job as with written communications bu oming performance year to remedy ted on PMP certification. e team.	ions ıt I '
	Appraisee Feedback	Hi Pat, I have received and revi don't have anything to Thanks, Chris	ewed this year's pe add.	rformance appraisal. I	

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.

OR	RACL	_€	рне	R Perforn	nance	Managen	nent - Su	perviso	r	
						navigate	or 🔻 🙀	Favorites 🔻	Home L	ogout Preferences Help
Appraisa	ls Perfor	mance	e Mana	agement						
									Logg	ed In As Supervisor1, Pa
On this p	age, you ca	n acces	ss worl	ker developm	nent fun	ctions and view	v performanc	e	Switch Manager	
managem	nent notifica	ition m	essage	s.					To perform tasks	as a different manager,
Perform	nance Man	ageme	ent Ta	sk List					select from the lis	st.
Expand A	All Collapse All View By Reporting Hierarchy				ger orting Hierarchy					
Ψ					Durana		Fred Data	Go to	Reports	
Focus Ta	sk				Proces	s Start Date	End Date	Task	Appraisal Summer	mary
Ξ	Fiscal 2016	5 Non-S	Supervi	sory		21-Mar-2016	6 16-Apr-201	6	u.l.	
	Manage Non-Sup	e apprai pervisor	isals: Aj ry Role	ppraisal- v3	Apprais	al 21-Mar-2016	6 16-Apr-201	6	Plan	Click to Access
Notifica	ations Awa	aitina \	Your A	ttention					Fiscal 2016	help bocuments
Subject	:	Sent	Name	Departmer	nt Job	Effective Da	te Update	e Delete	Non-Supervisory	
No result	s found.								click have to an	and the Deuferman
									Management we	cess the Performance

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

Filter the list of comp	leted appraisals using	; any combination of Ap	praisee, Appraisal Date, a	and Appra	isal Purp	oose.	
Employee		<u> </u>					
Appraisal Date	Last Name, Title, First N (example: 27-Mar-2016)	ame B					
Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016			Î	

# 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)

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

ORACI	_E <sup>®</sup> PHR Per	formance M	anagem	ent - Superv	isor			
		🔒 Navigati	or 🔻 🔒	Favorites 🔻	Home	Logout	Preferences	Help
Appraisals Perfor	rmance Managem	ent						
Main Appraiser								
Appraisals as Super	rvisor			Se	lected Plan I	s Fiscal	2016 Non-Sup	oerviso
Appraisals In Pro	gress							
Employee	Appraisal	Date	Status	Appraisal	Details	Print	Appraise	
No results found.								
Info Online								
Performance M	lanagement App	raiser Instruct	ions					
Performance M	<u>lanagement FAQ</u>							
Current Workers								
Completed Appra	aisals							
Filter the list of comp Employee Appraisal Date	oleted appraisals usin Last Name, Title, First (example: 27-Mar-2016 Go	ng any combinatio Name ) C <b>lear</b>	on of Apprai	see, Appraisal Dat	e, and Apprais	al Purpos	5e.	
Employee	Appraisal Date	Period Start	Date P	eriod End Date	Details	Print De	elete Jourr	nal
Employee1, Chris	21-Mar-2016	21-Mar-2016	10	6-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)

5. 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 Appr	aisals							
Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose. Employee Last Name, Title, First Name Appraisal Date (mode) 27 May 2010 Go Clear								
Employee	Appraisai Date	Period Start Date	Period End Date	Details	Print	Delete	Journal	
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016	Ē		Î		

# **Objective Setting Process Flow Diagram**



Copyright University of Pittsburgh. All rights reserved.

## 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.

### 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.

	🏩 Favorites 🔻		Logout	Preference	es Help
Enterprise Search All		Go	Sear	ch Results	s Display Pr
Oracle Applications Home Page			Logged	l In As EM	IPLOYEE1
Main Menu	Worklist				
Personalize				Full	List
🕀 🛅 PHR Employee Self-Service	From	Туре	Subject	Sent	Due
HR Performance Management - Employee      All Actions Awaiting Your Attention     Personal Actions     Appraisals     Performance Management     Performance Management     PISM TRKS Time	There are no notifications in this view. TIP <u>Vacation Rules</u> - Redirect or auto-respond to TIP <u>Worklist Access</u> - Specify which users can vie PRISM TRKS USERS: Approved timecards are Monday.	notifica w and a e due t	itions. act upon yo <b>pefore no</b> o	our notifica on on	ations.

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 <sup>®</sup> PHR Performance Management - Employee												
					🔒 Nav	igator 🔻 🛛	🤪 Favorite	s 🔻	Home Log	gout F	Preferences H	Help
Appraisals Pe	erformance	Manag	ement		1							
									Logged	l In A	s Employee1,	, Chr
On this page, yo notification mess	u can acces ages.	s your de	evelopment fur	nctions a	nd view Perforr	mance manag	jement	Help				
Performance	Manageme	nt Task	List					Plan			Attachmen	its
		ine rusk	LISC					Fiscal	2017 Non-Super	rvisory		
Expand All Col	llapse All											
÷												
Focus Task				Proces	s Start Date	End Date	Go to Task					
🖃 Fiscal 🛛	2017 Non-S	upervisor	у		30-Mar-2016	30-Apr-201	5					
Mai Nor	nage apprais n-Supervisor	al: Appra / Role v3	aisal-	Apprais	al 30-Mar-2016	30-Apr-2010						
Notifications	Awarung r	our Att	ention									
Subject	Sent	Name	Department	Job	Effective Date	e Update	Delete					
No results found	l.											

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

ORACLE <sup>®</sup> PHR Performance Management - Employee									
		🏦 Navigator 🔻	😝 Favorites 🔻	Home	Logout Preferences	Help			
Appraisals Performa	ance Management								
My Appraisals   Par	rticipant								
				Selected Plan Is	Fiscal 2017 Non-Su	perviso			
Objectives									
Appraisals of Emplo	vool Chris								
Appraisais of Emplo	yeer, enns								
Employee	Supervisor	Period Start Date	Status	Details	Print Undate				
Employee1, Chris	Supervisor1, Pat	30-Mar-2016	Planned						
Completed Appraisa	als				$\bigcirc$				
Note that the search is Initiator	case insensitive								
Appraisal Date	Last Name, Title, First Name								
	(example: 30-Mar-2016) Go Clear								
Initiator	Appraisal Date Period	Start Date Period End	Date Apprais	al Purpose	Details Print Pla	an			
No results found.									

Copyright University of Pittsburgh. All rights reserved.

## 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)

ORACLE <sup>®</sup> PHR Performance Management - Employee							
			🏛 Navigator 🔻 📮	🖡 Favorites 🔻	Home Logo	out Preferences Help	
	Overviev	v			Review		
Organiz	Employee Name ation Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Cance! Save a	s Draft Share Employee Num Departme	with Supervisor ber 167842 ent Financial In Job Staff.Admi	<u>Continue</u> formation Systems nistrator.III	
Objectives	1						
Objective Name	Start Date	Target Date	Date Completed	Duplicate Upda	ate Details	Quick Update	
			Cancel Save a	s Draft Share v	with Supervisor	Continue	

- 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

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 obje <i>Review Do</i> performa	ective should be reviewed periodically, enters the next review date in the <i>Next</i> ate field. (optional) It is not necessary to enter a date for the annual nce appraisal review.		
C C.I			

## Add/Update Objectives for the Fiscal Year

- 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)

ORACLEPH	R Performance Management - Er	nployee		
	📅 Navigator 🔻	🙀 Favorites 🔻	Home Logo	ut Preferences Help
c			Review	
Add Objective				
* Indicates required field	Cancel	Save as Draft	Apply and Add A	nother Apply
* Objective Name Improve	Work Flow		Complete (%)	Û
Created By Employ	ee1, Chris		Date Completed	
* Start Date 01-Jul-2	016		,	
Target Date 30-Nov-	2016			
Next Review Date				
* Priority High	•			
Description				
Detail	Modify the existing tasks and forms to provide and faster completion of work.	a more efficient flow	I	
			.H.	
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.

			📅 Navigator 🔻 🖪	📮 Favorites 🥆	Home Logout	Preferences H
	Overview				Review	
En	nployee Name Emp	oloyee1, Chris	Cance <u>l</u> Save a	s Draft Sha	re with Supervisor umber 167842	<u>C</u> ontinue
Organization	Email Address <u>kbird</u> Manager <b>Sup</b>	l@cfo.pitt.edu ervisor1, Pat		Depar	tment Financial Info Job Staff.Adminis	strator.III
Organization Objectives	Email Address <u>kbird</u> Manager <b>Sup</b>	l@cto.pitt.edu ervisor1, Pat		Depar	tment Financial Info Job Staff.Adminis	rmation System strator.III
Organization Objectives Add Objective	Email Address <u>kbro</u> Manager <b>Sup</b>	l@cto.pitt.edu ervisor1, Pat		Depar	tment Financial Info Job Staff.Adminis	rmation System strator.III
Organization Objectives Add Objective Objective Name	Email Address kbrd Manager Sup Start Date	(@cto.pit.edu ervisor1, Pat	Date Completed	Depar	Update Details	rmation System strator.III Quick Update
Organization Objectives Add Objective Objective Name Automate FRM-P2EYF	Email Address Kolrd Manager Sup Start Date 01-Sep-2016	Target Date 01-Apr-2017	Date Completed	Depar	Update Details	Quick Update

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.

			🛱 Navigator 🔻	🙀 Favorites 🔻	Home Logout	Preferences H		
	Overview		Review					
			Cance <u>l</u> Save	as Draft Shar	e with Supervisor	<u>C</u> ontinue		
Err Organization	nployee Name Emp Email Address <u>kbird</u> Manager Sup	oloyee1, Chris l@cfo.pitt.edu ervisor1, Pat		Employee Nu Depart	Imber 167842 Iment Financial Info Job Staff.Adminis	rmation System strator.III		
Err Organization Objectives Add Objective Objective Name	ployee Name Emp Email Address <u>kbird</u> Manager Sup Start Date	Noyee1, Chris @cfo.pitt.edu ervisor1, Pat	Date Completed	Employee Nu Depart	Inder 167842 ment Financial Info Job Staff.Adminis	rmation System strator.III Quick Update		
Err Organization Objectives Add Objective Dbjective Name Automate FRM-P2EYF	ployee Name Emp Email Address <u>koird</u> Manager Sup Start Date 01-Sep-2016	Noyee1, Chris @cfo.pitt.edu ervisor1, Pat Target Date 01-Apr-2017	Date Completed	Employee Nu Depart	Inder 167842 ment Financial Info Job Staff.Adminis	rmation System strator.III Quick Update		

# **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)

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

ORACLE <sup>®</sup> PHR Performance Management - Employee										
	🛱 Navigator 🔻	😝 Favorites 🔻	Home Logout Prefer	ences Help						
Share Details with Superviser										
Click Submit to transfer ownership to your supervisor.			Cancel	Sub <u>m</u> it						
Notification Message for Supervisor										
Click Submit to transfer ownership to your supervisor.	I have entered th might be another include it? Thanks, Chris	e two objectives that we d one but you didn't have th	iscussed last week. You s e details yet. Do you war	aid there nt me to 						

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

ORACLE <sup>®</sup> PHR Performance Management - Employee										
		🔒 Navigator	🔻 🌏 Favorites 🔻	Home L	ogout Preferences Help					
Appraisals Perform	mance Management									
My Appraisals   F	Participant									
			S	elected Plan Is	Fiscal 2017 Non-Supervisory					
<ul> <li>Confirmation</li> <li>Ownership has trato you and reque</li> <li>Objectives</li> <li>Appraisals of Emp</li> </ul>	insferred to your main ists your input. Ioyee1, Chris	appraiser. You cannot upda	te again until the main ap	praiser returns ov	vnership					
Employee	Supervisor	Period Start Date	Status	Deta	ils Print Update					
Employee1, Chris	Supervisor1, Pat	30-Mar-2016	Ongoing with Supervise	or						
Completed Apprai	isals									

# **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.

## **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.

	🔒 Favorites 🔻	L	.ogout Pre	eference	es l
erprise Search All			Go	Sea	arch
ole Applicatione Home Dage		Lo	gged In A	SUPE	RVI
cie Applications nome Page					
Main Menu	Worklist				
Personalize				Full	List
1 DHR Employee Self-Service	From	Туре	Subject	Sent	Du
P Pa					
PHR Performance Management - Employee	There are no notifications in this view. <b>TIP</b> <u>Vacation Rules</u> - Redirect or auto-re	espond to	notificatio	ins.	
	There are no notifications in this view. TIP <u>Vacation Rules</u> - Redirect or auto-re TIP <u>Worklist Access</u> - Specify which use notifications. PRISM TRKS USERS: Approved time on Monday.	espond to ers can vie c <b>ards an</b>	) notificatio ew and act e due bef	ins. : upon y f <b>ore nc</b>	our
PHR Performance Management - Employee     PHR Performance Management - Supervisor     All Actions Awaiting Your Attention     Manager Actions     Appraisals     Performance Management     Performance Management     Prism TRKS Supervisor     PRISM TRKS Time	There are no notifications in this view. TIP Vacation Rules - Redirect or auto-re TIP Worklist Access - Specify which use notifications. PRISM TRKS USERS: Approved times on Monday. Favorites	espond to ers can vie cards an	o notificatio aw and act	ns. : upon y f <b>ore nc</b>	our

## 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 <sup>®</sup> PHR Performance Management - Supervisor										
						🔒 Naviga	tor 🔻 🕞	Favorites •	Home Logout Preferences Help	
Appraisals	Perfo	rmance	e Mana	gement						
									Logged In As Supervisor1, Pat	
On this page	e, you ca	an acce	ss work	er developme	ent functi	ions and view	performance		Switch Manager	
managemen	t notifica	ation m	essages	s.					To perform tasks as a different manager,	
Performa	nce Mai	nadem	ent Ta	sk List					select from the list.	
									Switch Manager	
Expand All	Collaps	ie All								
<b></b>									View By Reporting Hierarchy	
								Go to	Reports	
Focus Task					Process	Start Date	End Date	Task	Appraisal Summary	
🖃 Fi	scal 201	7 Non-9	Supervis	ory		30-Mar-2016	30-Apr-2016	5		
	Manag	e appra	isals: Ap	praisal-	Appraisa	30-Mar-2016	30-Apr-2016		Help	
	Non-Su	pervisor	y Role	v3					Plan Attachments	
Notificatio		niting 1		ttantion					Fiscal 2017	
Notificatio	JIS AW	arung	TOUL A	ctention					Non-Supervisory	
Subject		Sent	Name	Departmen	t Job	Effective Dat	te Update	Delete		
No results fo	ound.									

6. The *Main Appraiser* page will open.

OR/	ORACLE <sup>®</sup> PHR Performance Management - Supervisor								
			🏦 Navigator 🔻	🙀 Favorites 🔻	Hor	ne Lo	ogout Pr	eferences	Help
Appraisals	Performance	Management							
Main Appra	iser								
					Selected Pla	n Is	Fiscal 20	17 Non-Su	perviso
Objectives A	s Supervisor								
Objectives	s in Progress								
Employee		Period Start Date	Status		Det	ails	Print	Update	
Employee1,	Chris	<u>30-Mar-2016</u>	Ongoing with	Supervisor	E			1	

## 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)

7. Click the *Update* icon.

ORACL	€ <sup>®</sup> PHR Performanc	e Management - Sup	ervisor	
		🏛 Navigator 🔻 🏾 🙀 Fa	vorites 🔻 🛛 Home L	ogout Preferences He
Appraisals Performa	ince Management			
Main Appraiser				
			Selected Plan Is	Fiscal 2017 Non-Super
Objectives As Supervis	or			
Objectives in Progre	55			
Employee	Period Start Date	Status	Details	Print Update
Employee1, Chris	<u>30-Mar-2016</u>	Ongoing with Supervis	sor	i i 🦯
Info Online				$\bigcirc$
Topics				
<u>Handbook</u>				
Current Workers				
Completed Appraisa	ls			
Filter the list of complet Employee Appraisal Date	ed appraisals using any combi	nation of Appraisee, Appraisal D	Date, and Appraisal Purpose.	
	(example: 30-Mar-2016) Go Clear			
Employee	Appraisal Date	Period Start Date	Period End Date	Details Print
No results found.				

## 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 <sup>®</sup> PHR Performance Management - Supervisor							
	🔒 Navigator 🗸	🙀 Favorites 🔻	Home Logout Preferences Hel				
Supervisor Review							
		Share wit	th Employee Update Objectives				
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu	Employee N Depar	umber 167842 tment Financial Information System				
Manager	Supervisor1, Pat		Job Staff.Administrator.III				
Objectives							
Show All Details Hide All Details							
Details Objective Name	Start Date	Target Date	Date Completed				
Show Nutomate 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

Copyright University of Pittsburgh. All rights reserved.

## 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.

	nce Management	- Supervisor	
	🔒 Navigator 🔻	🙀 Favorites 🔻	Home Logout Preferences Help
Supervisor Review			
		Share with I	Employee Update Objectives
Employee Name Employee1 Organization Email Address <u>kbird@cfo.p</u>	l <b>, Chris</b> litt.edu	Employee Num Departm	ber 167842 ent Financial Information Systems
Manager Supervisor	1, Pat		Job Staff.Administrator.III
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 E Det	By Employee1, Chris all Develop the specif Work with the dev form. Revise polic version. Develop a	ications to put form FRI elopment team to build y & procedure to accom Ind deliver training.	M-P2EYF online. and test the new modate the on-line
Success Criter	<ul> <li>Paper FRM-P2EYF with an on-line for activities.</li> </ul>	vill be eliminated and se m with no disruption in	amlessly replaced day-to-day
Commen Next Review Dat Priori Complete (%	ts te <b>01-Jan-2017</b> ty <b>High</b> b)		
End Show Improve Work Flow	01-Jul-2016	30-Nov-2016	

### 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.

	formance Manag	ement - Supe	rvisor	
		🔒 Navigator 🔻	🙀 Favorites 🔻	Home Logout Preferences Help
Supervisor Review				
			Share wit	h Employee Update Objectives
Employee Name	Employee1, Chris		Employee Num	ber 167842
Organization Email Address	kbird@cfo.pitt.edu		Departm	ent Financial Information Systems
Manager	Supervisor1, Pat			Job Staff.Administrator.III
Objectives				
Show All Details Hide All Details				
Details Objective Name	Start Dat	e Ta	rget Date	Date Completed
Show Automate FRM-P2EYF 01-Si		16 01	-Apr-2017	
+ Show Improve Work Flow 01		6 30	-Nov-2016	

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

ORACLE <sup>®</sup> PHR Performance Management - Supervisor								
		🔒 Nav	igator 🔻	🙀 Favorites 🔻	Hom	ie Logout	Preferences	Help
Supervisor Review >								
Update Appraisal								
Employee Nam Organization Email Addres Manage	Employee1, C kbird@cfo.pitt. Supervisor1,	Chris edu Pat		Employee Dep	Cancel Number 167 Partment Fina Job Staf	Save as 842 Incial Infor ff.Adminis	Draft A rmation Syst trator.III	pply tems
Objectives								
Add Objective								
Details Objective Name	Start Date	Target Date	Date Co	mpleted	Duplicate	Update	e Comments	
<u> </u>	01-Sep-2016	01-Apr-2017			l		4	
<u>Show</u> Improve Work Flow	01-Jul-2016	30-Nov-2016			l)			

Copyright University of Pittsburgh. All rights reserved.

## 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)

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

ORACLE	R Performance Management - Supervisor	
	🙃 Navigator 🔻 🏾 🍒 Favorites 👻	Home Logout Preferences Help
Supervisor Review > Update A Update Objective Details	ppraisal >	
Click Add Objective to create ob * Indicates required field * Objective Name	iectives against which you measure performance.	cel Save as Draft Apply
Created By * Start Date 30-Nov- Next Review Date	Work How ee1, Chris D16 D16 D016 D016 D016 D016 D016 D016 D	Date Completed
Description		
Detail	Modify the existing tasks and forms to provide a more efficient flow and faster completion of work.	м
Success Criteria	Realize a 10% improvement in effort and work completion.	
Comments		

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

## 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 (\*).

ORACL		formance Man	agement - Empl	oyee		
			🏛 Navigator 🔽	🙀 Favorites 🔻	Home Logo	ut Preferences He
	Overview	1			Review	
Organiza	Employee Name stion Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Cance <u></u> Save	e as Draft Shar Employee Nu Depart	me with Supervisor mber 167842 ment Financial In Job Staff.Admin	<u>Continue</u> formation System nistrator.III
Objectives						
Objective Name No results found.	Start Date	Target Date	Date Completed	Duplicate Up	odate Details	Quick Update
			Cance <u>l</u> Save	as Draft Shar	e with Supervisor	<u>C</u> ontinue

1. Click the Add Objective button. (required)

- 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)

Copyright University of Pittsburgh. All rights reserved.

### 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)

Image: Navigator ▼ Pavorites ▼       Home Logout Preferences Het         Supervisor Review > Update Appraisal >         Update Objective Details         Cick Add Objective to create objectives against which you measure performance.       Cancel Save as Draft Apply         * Indicates required field       *         * Objective Name       Update Department Web Page       Complete (%)         Created By       Supervisor1, Pat       Date Complete (%)         * Start Date       [15-Aug-2016]       Date Completed         Target Date       31-Dec-2016       Date Completed         Next Review Date	ORACLE <sup>®</sup> PHR Performance Management - Supervis	sor
Supervisor Review > Update Appraisal > Update Objective Details Click Add Objective to create objectives against which you measure performance. * Indicates required field * Objective Name Update Department Web Page Complete (%) Date Complete d * Start Date 15-Aug-2016 Target Date 31-Dec-2016 Next Review Date Priority Medium  Description Detail Bring Department Web Page up-to-date	🙃 Navigator 👻 🏹 Favorites 🥆	<ul> <li>Home Logout Preferences Help</li> </ul>
Update Objective Details  Click Add Objective to create objectives against which you measure performance. Cancel Save as Draft Apply  * Objective Name Update Department Web Page Complete (%) Created By Supervisor1, Pat * Start Date 15-Aug-2016 Target Date 31-Dec-2016 Next Review Date Priority Medium  Description  Detail Bring Department Web Page up-to-date	Supervisor Review > Update Appraisal >	
Click Add Objective to create objectives against which you measure performance. Cancel Save as Draft Apply * Indicates required field * Objective Name Update Department Web Page Created By Supervisor1, Pat Target Date 15-Aug-2016 Target Date 31-Dec-2016 Next Review Date Priority Medium  Detail Bring Department Web Page up-to-date	Update Objective Details	
* Objective Name Update Department Web Page Complete (%) Date Complete (%) Created By Supervisor1, Pat Date Completed Date Completed * Start Date 31-Dec-2016 Target Date 31-Dec-2016 Next Review Date Medium Priority Medium Description Detail Bring Department Web Page up-to-date 	Click Add Objective to create objectives against which you measure performance. $\ensuremath{^*}$ Indicates required field	Cancel Save as Draft Apply
Created By Supervisor1, Pat Date Completed * Start Date 15-Aug-2016 Target Date 31-Dec-2016 Next Review Date Priority Medium  Description  Detail Bring Department Web Page up-to-date	* Objective Name Update Department Web Page	Complete (%)
* Start Date 15-Aug-2016 Target Date 31-Dec-2016 Next Review Date Priority Medium Priority Medium Description Detail Bring Department Web Page up-to-date 	Created By Supervisor1, Pat	Date Completed
Target Date 31-Dec-2016   Next Review Date Image: Comments   Priority Medium	* Start Date 15-Aug-2016 🔤	
Next Review Date Priority Medium	Target Date 31-Dec-2016 🗐	
Priority       Medium         Description         Success Criteria       Bring Department Web Page up-to-date         Success Criteria       Revised web site displaying only current content and links.         Comments	Next Review Date	
Description         Success Criteria       Bring Department Web Page up-to-date         Success Criteria       Revised web site displaying only current content and links.         Comments	Priority Medium	
Detail     Bring Department Web Page up-to-date       Success Criteria     Revised web site displaying only current content and links.       Comments	Description	
Success Criteria Revised web site displaying only current content and links.	Duti L	
Success Criteria Revised web site displaying only current content and links.	Bring Department Web Page up-to-date	
Success Criteria Revised web site displaying only current content and links.		
Success Criteria Revised web site displaying only current content and links.		
Comments	Success Criteria Revised web site displaying only current content and links	
Comments		
Comments		
	Comments	
	Continents	
h.		

## 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 <sup>®</sup> PHR P	erformance M	anagement	- Supervisor		
	<b>†</b>	Navigator 🔻 🚦	🦕 Favorites 🔻	Home	e Logout Preferences Help
Supervisor Review					
			Share wit	th Employe	e Update Objectives
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu		Employee N Depa	Number 16 Intment Fil	57842 nancial Information
Manager	Supervisor1, Pat			Sy Job St	ystems taff.Administrator.III
Objectives					
Show All Details Hide All Details					
Details Objective Name		Start Date	Target Date	Da	ate Completed
Show Automate FRM-P2EYF		01-Sep-2016	01-Apr-2017		
+ Show Improve Work Flow		01-Jul-2016	30-Nov-2016		
<u> → Show</u> Update Department Web Pa	ge	15-Aug-2016	31-Dec-2016		

### 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.

	erformance Ma	anagement - S	Supervisor	
	<b>†</b>	Navigator 🔻 🛛 🤤	Favorites 🔻 🛛 H	ome Logout Preferences Help
Supervisor Review			$\sim$	<u> </u>
			Share with Emp	oyee Update Objectives
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu		Employee Number Department	167842 Financial Information
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	
<u> </u>	ge	15-Aug-2016	31-Dec-2016	

## 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.

	ance Managen	nent - Supervis	sor	
	🔒 Navigator 🔻	🙀 Favorites 🔻	Home Logout Prefe	rences Help
Share Appraisal Details with Appraisee				
			Cancel	Sub <u>m</u> it
Details to be Shared with Appraisee				
Select appraisal components completed by the Competency Ratings and Comments Objective Ratings and Comments	main appraiser to sha	are with the appraise	e. © Overall Rating © Overall Comments	
Appraisal Ownership				
Select Main Appraiser Retains Ownership to cor Main Appraiser Retains Ownership	itinue updating the a	ppraisal.		
Appraisee Permissions				
Indicate whether the appraisee can update the names. Update Appraisal Provide Feedback on Overall Rating Select only a you also select Overall Rating	e appraisal, provide fe	edback on the overa	II rating, and view and add partic	cipant s
Notification Message to Appraisee				
Enter your message, and click Submit to share	with the employee (a	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)

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 Improve Work Flow objective. When you are finished, please transfer the Objectives form back to me for review.	the
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 <sup>®</sup> PHR Performance Management - Supervisor							
				🛱 Navigator 🔻	🕞 Favorites 🔻	Home Logo	out Preferences Help
Appraisals	Performance	Management					
Main Appra	iser						
						Selected Plan Is	Fiscal 2017 Non-Supervisor
<b>Objectives</b> A	As Supervisor						
Objectives	s in Progress						
							$\frown$
Employee		Period Start Dat	te	Status		Details	Print Update
Employee1,	Chris	30-Mar-2016		Transferred to E	mployee 🌙		
Info Online							
Topics							

Cancel

Sub<u>m</u>it

# 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.

ORACLE <sup>®</sup> PHR Performance Management - Supervisor								
A Company	A	Navigator 🔻	🙀 Favorites 🔻	Hom	e Logout	Preferences	Help	
Supervisor Review								
			Share w	vith Employ	ee U	pdate Object	ives	
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu		Employee Dep	e Number 1 partment Fi	67842 inancial In	formation		
Manager	Supervisor1, Pat			Job S	taff.Admi	nistrator.III		
Objectives								
Show All Details Hide All Details								
Details Objective Name		Start Date	Target Dat	te D	ate Comp	leted		
Show Automate FRM-P2EYF		01-Sep-2016	5 01-Apr-2017	7				
<u> </u>		01-Jul-2016	30-Nov-201	6				
+ Show Update Department Web Pa	ge	15-Aug-201	6 31-Dec-201	6				

# 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)

- Be sure all of the boxes on the Share Appraisal Details with Apparaisee form are unchecked except for the Udate 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 <sup>®</sup> PHR Performanc	e Management - Superv Navigator 🔻 🕞 Favorites	/ <b>isor</b> ✔ Home Logout Preferences Help
Share Appraisal Details with Appraisee		
		Cance <u>l</u> Sub <u>m</u> it
Details to be Shared with Appraisee		$\smile$
Select appraisal components completed by the mai	n appraiser to share with the ap	opraisee. Overall Rating Overall Comments
Appraisal Ownership		
Select Main Appraiser Retains Ownership to continu	ie updating the appraisal.	
Appraisee Permissions		
Indicate whether the appraisee can update the appraise. Update Appraisal Provide Feedback on Overall Rating Select only if you also select Overall Rating	raisal, provide feedback on the	overall rating, and view and add participant
Notification Message to Appraisee		
Enter your message, and click Submit to share with The Objectives for Fiscal 2017 are approved. I with progress throughout the year. Thank you, Pat	the employee (appraisee). Please update them	

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

## **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:

Ohiectives

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

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	l	Ì	<i>i</i>
Objective B	01-Oct-2015	30-Jan-2016	30-Jan-2016	2-Achieved Result	l	1	
Objective C	07-Nov-2015	11-Mar-2016		j	l	Ì	

2. Enters comments that will enable the supervisor to update the objective. pportunity to contribute significantly to improving both your own performance and

th 0	bjective Quic	k Update		×
	Objectiv Measureme	e Name Objective C nt Style None	Target Date Complete (%)	11-Mar-2016 jj
on		Change to Plain Text Mode       B     Z     U     i=       i=     i=		
yo	Comments	This project was complet 2016. The results metrics uploaded to SharePoint.	ed on March 10, s have been	
<b>D</b> a 18			C	Cance <u>l</u> Apply
30				

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

Copyright University of Pittsburgh. All rights reserved.

# 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.

ORACLE PHRI	Performance Management -	• Supervisor Favorites  Home	e Logout Preferences Help
Details: Main Appraiser			
Employee Name Organization Email Address Manaqer	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Update Share with A Employee Number Department Job	Printable Page 167842 Financial Information Systems Staff.Administrator.III
Setup Details			
Initiator Appraisal Purpose Period Start Date Period End Date Template	Employee1, Chris 30-Mar-2016 30-Apr-2016 Appraisal-Non-Supervisory Role v3	Main Appraiser Appraisal Date Next Appraisal Date	Supervisor1, Pat 30-Mar-2016
Overall Rating and Comments			
C Ap	Overall Rating Iverall Comments praisee 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

5.

6.

## 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.

		<b>f</b>	Navigator 🔻	🛛 🔒 Favo	orites 🔻 🔄	Home Logout	Preferences H <u>elp</u>
ppraisals Performa	ance Management						
						Logged	In As Supervisor1,
)n this page, you can a conservent potification	ccess worker develop	ment function	is and view	performance	e	Switch Manager	
Performance Manad	ement Task List					To perform tasks as select from the list	a different manager,
Expand All Collapse A						Switch Manager	7
s	<u>1</u>					View Dy Deporti	
÷						лем ву кероги	
					Go to	Reports	
Focus Task		Process S	tart Date	End Date	Task	Appraisal Summa	ГХ
Fiscal 2017 N	on-Supervisory	Approical 2	0-Mar-2016	30-Apr-2016			
Non-Superv	isory Role v3	Appraisar 5	0-Mai-2010	30-Api-2010	'(₿)	Plan	Attachmont
Notifications Awaiti	na Your Attention				$\mathbf{\nabla}$	Fiscal 2017 Non-	Attachiment
Subject Ser	t Name Departme	ent Job Ef	fective Dat	e Update	e Delete	Supervisory	
lo results found.							
DRACL	E <sup>®</sup> PHR Peri	formance	Manage	ment - S	k the <i>L</i> upervis	or	
ORACL	E <sup>®</sup> PHR Peri	formance	Manage tor 👻 🗳	ment - S	k the <i>L</i> upervis ▼	or Home Logout Pre	eferences Help
Perform	PHR Perf	formance Raviga	Manage tor ▼	rm, CIIC ment - S Favorites	k the <i>L</i> upervis ▼	or Home Logout Pre	eferences Help
oracle oppraisals Perform fain Appraiser	Approiser of A	formance Raviga	Manage ttor ▼	orm, CIIC ment - S	k the <i>L</i> upervis ▼	or Home Logout Pro	eferences Help
oracle ppraisals Perform tain Appraiser	Approiser of A	formance n Naviga	Manage itor ▼	nrm, CIIC ment - S Favorites	k the <i>L</i> upervis Sel	or Home Logout Pro	eferences Help 2017 Non-Supervis
ppraisals Perform tain Appraiser	PHR Perf	formance	Manage ttor ▼ 🗣	rm, clic ment - S Favorites	k the <i>L</i> upervis Sel	or Home Logout Pro lected Plan Is Fiscal	eferences Help 2017 Non-Supervis
opraisals Perform tain Appraiser	PHR Perf	formance	Manage ttor ▼ ■	rm, clic ment - S	k the <i>L</i> upervis	or Home Logout Pro	eferences Help 2017 Non-Supervis
ORACL ppraisals Perform lain Appraiser Objectives As Superv Objectives in Progr	PHR Perf	formance	Manage Itor ▼	rm, clic ment - S	k the <i>L</i> upervis ▼ Sel	or Home Logout Pro	eferences Help 2017 Non-Supervis
ORACL oppraisals Perform Main Appraiser Objectives As Superv Objectives in Progr	PHR Perf	formance T Naviga nt	Manage Itor V	rm, clic ment - S Favorites	k the <i>L</i> upervis ▼ Sel	or Home Logout Pre lected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
ORACL ppraisals Perform tain Appraiser Objectives As Superv Objectives in Program imployee imployee1, Chris	PHR Perf	iormance	Manage Itor V	with Superv	k the L upervis Sel	ected Plan Is Fiscal	eferences Help
ORACL ppraisals Perform tain Appraiser Objectives As Superv Objectives in Progr Employee Employee1, Chris	Approvision of the second seco	iormance n Naviga nt	Manage Itor V	Favorites	k the L upervis Sel	ected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
oppraisals Perform tain Appraiser Objectives As Superv Objectives in Progr Employee Employee1, Chris	Approver of A PHR Perf nance Manageme visor ress Period Start D 30-Mar-2016	iormance n Naviga	Manage Itor V	with Superv	k the <i>L</i> upervis Sel	ected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
oppraisals Perform tain Appraiser Objectives As Superv Objectives in Progr Employee Employee1, Chris Info Online	Approvision of the second seco	iormance n Naviga	Manage Manage Itor V	with Superv	k the <i>L</i> upervis Sel	ected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
oppraisals Perform tain Appraiser Objectives As Superv Objectives in Progr Employee Employee Employee1, Chris Info Online Topics	Approvision of the second seco	iormance n Naviga nt	Manage Manage Itor V	with Superv	k the <i>L</i> upervis Sel	ected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
ORACL oppraisals Perform tain Appraiser Objectives As Superv Objectives in Progr Employee	Approver of A PHR Performance Management visor ress Period Start D 30-Mar-2016	iormance n Naviga nt	Manage Manage Itor V	with Superv	k the <i>L</i> upervis Sel	ected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update
oppraisals Perform tain Appraiser Objectives As Superv Objectives in Progra imployee imployee imployee imployees info Online Topics Handbook lick the Printah	Approviser of A Approviser of	ny Appro formance n Naviga nt	Manage Nor V A	with Superv	k the <i>L</i> upervis Sel visor	or Home Logout Pro lected Plan Is Fiscal	eferences Help 2017 Non-Supervis int Update

			Bac <u>k</u> Printable Page
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu	Employee Number Department	166670 Financial Information
Manager	Supervisor1, Pat	Job	Staff.Administrator.III

Copyright University of Pittsburgh. All rights reserved.
# **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.



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

 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	Туре	Performance Rating	Comments
Supervisor1, Pat	Main Appraiser	3-Successful	

#### **Core.Initiating Action**

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

## 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	Bac <u>k</u>	Print
Select the printable option as table or form layout. The table layout pres format. The form layout presents objectives and competency details in	sents objectives a continuous text fo	and competency de ormat.	tails in a ta	bular

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         n Navigator       Phr Performance Management - Employee         PHR Performance Manag
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. O Form Layout Table Layout
✓ Include Setup Details
Include Competency Details

## 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 'Appraisee Comments' or 'Appraisee Performance Rating' as no data is collected in those columns.

✓ Include Competency Details		
Available Details	Selected Details	
Appraisee Comments Appraisee Performance Rating Main Appraiser Comments Main Appraiser Performance Rating Overall Rating and Comments	Move Move All S Remove	
Description	Operation	

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



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





### 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.



Check All Uncheck All

Print

Bac<u>k</u>

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

#### Worker Details

renter betans	
Employee name	Employee1, Chris
Assignment Number	166670
Manager	Supervisor1, Pat
Department	Financial Information Systems
lob	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 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.

O		erforma	nce Manag	jement - E	mployee	•	
		n N	avigator 🔻 🛛	😼 Favorites	-	Home Logout F	Preferences Help
Apprai	sals Performance Managen	nent					
						Logged Ir	As Employee1, Ch
On this manag	page, you can access your deve ement notification messages.	lopment fu	inctions and v	view Performa	ance	Help	
Perfo	ormance Management Task Li	Plan	Click to Access Help Documents				
Expan $\bigcirc$	d All Collapse All					Fiscal 2016 Non- Supervisory	
Focus	Task	Process	Start Date	End Date	Go to Task	Click <u>here</u> to acce Management web	ess the Performance
rocus	Fiscal 2016 Non-Supervisory	1100035	21-Mar-2016	16-Apr-2016	TUSK		
	Manage appraisal: Appraisal-Non-Supervisory Role v3	Appraisal	21-Mar-2016	16-Apr-2016	₿		

### 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 A	Completed Appraisals								
Note that the sea Init	ote that the search is case insensitive Initiator								
Appraisal	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 a Completed Performance Appraisal Using the Print Icon After the Appraisal is Approved

2. 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 Apprai	Completed Appraisals								
Filter the list of compl	ilter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.								
Apprecial Date	Last Name, Title, First Name								
	(example: 18-Mar-2016) Go Clea	ar			$\cap$				
Employee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal		
Employee1, Chris	21-Mar-2016	21-Mar-2016	16-Apr-2016	Ē		Î			

### 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**

Annraisal Details

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									
Logged in manager can vi	Appraisal Summary as on 10-Feb-2016 Summary for Manager Employee1, Lisa Louise									
	1-	2-Needs	2-Needs 4-Above							
Manager	Unsatisfactory	Development	3-Successful	Expectations	5-Exceptional	Appraised	Total			
Employee20, Megan Eileen	0	0	2	1	0	11	<u>14</u>			
Employee11, Dianna Lynn	0	0	1	1	0	6	<u>8</u>			
Employee1, Lisa Louise	1	0	1	0	1	6	<u>9</u>			
Employee49, Lorraine M	0	0	0	0	1	0	1			
Employee31, Angel Diana	0	2	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.

Manager Employee31, Angel Diana								
						S Previous	1-10 🔽 <u>Next 10</u> 🕗	
Appraisal Template	Appraisee	Main Appraiser	Appraisal Date	Start Date	End Date	Rating	Status	
Appraisal-Non-Supervisory Role v	2 Employee33, Sierra	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	2-Needs Development	Completed	
Appraisal-Non-Supervisory Role v	2 Employee39, Patricia	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned	
Appraisal-Non-Supervisory Role v	2 Employee40, Patricia	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned	
Appraisal-Non-Supervisory Role v	2 Employee38, Carol	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned	
Appraisal-Non-Supervisory Role v	2 Employee34, Stacey	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Ongoing with Supervisor	
Appraisal-Non-Supervisory Role v	2 Employee48, Amanda	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	5-Exceptional	Pending Approval	
Appraisal-Non-Supervisory Role v	2 Employee32, Danielle	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned	
Appraisal-Non-Supervisory Role v	2 Employee36, Lisa	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016	3-Successful	Completed	
Appraisal-Non-Supervisory Role v	2 Employee37, Sara	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Planned	
Appraisal-Non-Supervisory Role v	2 Employee35, Jamie	Employee31, Angel	04-Feb-2016	04-Feb-2016	31-Mar-2016		Ongoing with Supervisor	
						O Previous     O	1-10 V Next 10 📎	

## Appraisal Summary Report

### **Rating Distribution Percentage View**

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



Copyright University of Pittsburgh. All rights reserved.

## 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.

O	RACLE <sup>®</sup> PHR Performance Mai	nagemen	t - Supervi 🟦 <sub>Na</sub>	sor wigator <del>▼</del> I	Favorites	s▼ Home Logout Preferences Help
Apprai	sals Performance Management					
						Logged In As Employee1, Lis
On this	page, you can access worker development function	s and view p	erformance n	nanagement i	notification	Switch Manager
messa	jes.					To perform tasks as a different manager, select
Perf	ormance Management Task List					from the list.
Expan	d All Collapse All					Switch Manager
÷						View By Reporting Hierarchy
					Go to	keports
Focus	Task	Process	Start Date	End Date	Task	Appraisal Summary
	My Plans					
÷	Employee1 PMP		04-Feb-2016	30-Jun-2016		Help
	Manage appraisals: Appraisal-Non- Supervisory Role v2	Appraisal	04-Feb-2016	30-Jun-2016	-	Click to Access Plan Help Documents

## Appraisal Summary Report

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

	anager	nent - Supervisor avigator 🔻 🗣 Favorites 🔻		Home Logout	Preferences	Help
Appraisals Performance Management						
Performance Management Plan Appraisal Rating Sum	mary					
Select and Search						
* Plan	Employ Select a	ee1 PMP	l period.			
	Select	Appraisal Template	Start Date	End Date		
		Appraisal-Non-Supervisory Role v2	04-Feb- 2016	31-Mar- 2016		
(	Go					

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

Copyright University of Pittsburgh. All rights reserved.

## 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.

O		nce Man	agement -	Superviso	or orites ▼	Home Logout Preferences Help
Apprai	sals Performance Management					
						Logged In As Employee1, Lisa
On this	page, you can access worker development	t functions	and view per	formance ma	nagement	Switch Manager
notifica	tion messages.					To perform tasks as a different manager,
Perfe	ormance Management Task List					select from the list.
Expan	d All Collapse All					Switch Manager
¢						View By Reporting Hierarchy
					Go to	Reports
Focus	Task	Process	Start Date	End Date	Task	Appraisal Summary
	My Plans					
<b>(</b>	Employee1 PMP		04-Feb-2016	30-Jun-2016		Help
	Manage appraisals: Appraisal- Non-Supervisory Role v2	Appraisal	04-Feb-2016	30-Jun-2016	-	Click to Access Help

## View by Reporting Hierarchy

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

O	ORACLE <sup>®</sup> PHR Performance Management - Supervisor										
		î	Navigator 🔻 🏹 Favo	orites 🔻 Home Logout	Preferen	ces Help					
Name		Go Advanced Se	arch My List								
Perform	nance Management >										
Perfor	mance Management: Peopl	e in Hierarchy									
¢											
Focus	Name	Assignment Number	Job	Department	Action	Details					
	Supervisor1, Pat										
	Employee1, Chris	166670	Staff.Administrator.III	Financial Information Systems		Ē					
	Employee2, Robin	166687	Staff.Administrator.III	Financial Information Systems		Ę					

5. <u>Find the appraisal to be viewed and click the *Details* icon to review that appraisal.</u>

ORACI	_E PHR Perf	formance Manag	ement - Supervi	sor			
		🔒 Nav	vigator 🔻 🛛 🥁 Favori	ites 🔻	Home	Logout Preference:	s Help
View Appraisals							
Appraisals							
View All	GO						
Initiator	Appraisee	Appraisal Date 🔻	Appraisal Status	Туре	Main Appraise	r 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.

ORACI	_E <sup>®</sup> PHR Perfo	ormance Mana	gement -	Supervis	or			
		🛱 N	lavigator 🔻	🙀 Favorit	es 🔻	Home	Logout Pref	erences Help
View Appraisals								
Appraisals								
View All	GO							
Initiator	Appraisee	Appraisal Date 🔻	Appraisa	al Status	Туре	Main Appraise	r Details	
Employee2, Robin	Employee2, Robin	29-Mar-2016	Planned	$\mathcal{I}$		Supervisor1, Pat		

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

## 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.

ORA	CLE	PHR Perfor	mance Management - Sup	ervisor		
			🔒 Navigator 🔻	🕞 Favorites 🔻	Home Logo	out Preferences Help
Appraisals	Performan	ce Management				
Main Appra	iser					
				Select	ted Plan Is Trainir	ng Plan 2-Staff Non-Supv Role
Appraisals a	as Superviso	r				
Appraisals	s In Progress	5				$\sim$
Employee		Appraisal Date	Status	Аррі	raisal Details	Print Appraise
Employee2,	Tom	04-Apr-2016	Ongoing with Supervisor			li 🧷
Info Online						
Tesler						
ropics						
Performa Performa	ance Manage ance Manage	ement Appraiser 1 ement FAQ	Instructions			

### 3. Click the *Change Main Appraiser* button.

ORACLE PHR P	erformance Management	- Supervisor		
	Navig	ator 🔻 📑 Favorites 🔻	Home	e Logout Preferences Help
Supervisor Review				
	Sh	are with Employee	Update Appra	aisal Submit for Approval
Employee Name	Employee2, Tom	En	nployee Number	166637
Organization Email Address Manager	Supervisor2, Anthony		Job Job	Med-Medicine Staff.Administrator.II
Setup Details				
Initiator	Employee2, Tom		Supervisor 5	Change Main Appraiser
Appraisal Purpose Status		Next	Appraisal Date C Appraisal Date	J4-Apr-2016
Template	Appraisal-Non-Supervisory Role v3			
Overall Rating and Comments				

# Supervisor: Changing Main Appraiser

### Change Main Appraiser

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



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.



### Change Main Appraiser

7.

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	Search and Select: Main Appraiser					
Searc	ch					
To fir	nd your iter	m, select a filter iter	n in the pulldown list and enter a v			
Searc	h By Full N	Name 💌 emplo	/ee1 Go			
	,	,				
Resu	lts					
	Quick					
Select	Select	Full Name	Job			
$\odot$		Employee1, Chris	Staff.Administrator.III			
$\odot$		Supervisor2, Mark	Staff.Administrator.IV			
Click 1	the App	ly button.				
	Appraisal Purpose					
		Period Start I	Date 29-Mar-2016			
		Period End I	Date 16-Apr-2016			
		Tem	late Appraisal-Non-Supervisory Rol			
		Appraisal I	Date 29-Mar-2016			

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

\* Main Approver Supervisor2, Mark

Next Appraisal Date Assignment Number 166687

<b>ORACLE</b> <sup>®</sup> PHR Performance Management - Supervisor						
1	🏦 Navigator 🔫	🙀 Favorites 🔻	Home Logout Preferences			
<ul> <li>Information</li> <li>To confirm the new main appraiser or click Yes, you can no longer make chan</li> </ul>	update overall com ges to the apprais	ments or rating, clic al.	k Yes. Once you			
Notification Comments						
Since Ruth reported to you for almost Thank you, Anthony	all of the appraisal ye	ar, please complete he	er annual performance appraisal.			
			No Yes			

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

## **Review Main Appraiser Change Notification**

Steps:

3.

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

Acle Applications Home Page Main Menu Personalize	Worklist		<u>d</u> 3	earch Results Display r	Telefence Jotandard
acle Applications Home Page Main Menu Personalize	Worklist				Logged In As APVRTVO
Main Menu Personalize	Worklist				
Personalize	Worklist				
Personalize					
					Full List
HR Professional V4.0	From	Type Subject			Sent Due
PHR Performance Management - Employee     Dup Deformance Management - Supervisor	Anthony	Employee2, Tom.	lected as main appra	ilser for the appraisal of	1 4-Apr-2016
	TIP Vacation R	ules - Nedirect or auto-res	pond to notifications.	waterbing	
	• TIP WORKISCAC	cess - specify which use		, our nouncations.	
	PRISM TRKS US	ERS: Approved timecar	ds are due before	noon on Monday.	
	Favorites				
			Personalize		
	You have not sel	lected any favorites. Pleas	e use the		
	reisonalize bui	uon to set up your ravono	<i></i>	-	
	Logo	ut Preferences Help			
				Copyright (	c) 2000, Oracle: Air rights reserv
eview comments from N	лат Арр	raicar			
	nunn (pp	aiser.			
	nam ropp	alser.		- Contraction	
DRACLE <sup>®</sup> E-Business Suite		n Navigator ▼	🌸 Favorites 🔻	Home Logou	t Preferences Help
Cle Applications Home Page >		n Navigator <del>→</del>	🔮 Favorites 🔻	Home Logout	t Preferences Help
CRACLE <sup>®</sup> E-Business Suite		n Navigator ▼	Favorites	Home Logou	t Preferences Help
CRACLE® E-Business Suite cle Applications Home Page > Information This notification does not require a response.		ft Navigator 🔻	Favorites -	Home Logou	t Preferences Help
CRACLE <sup>®</sup> E-Business Suite cle Applications Home Page > Information This notification does not require a response.	raisal of Employee2	n Navigator -	Favorites	Home Logou	t Preferences Help
CRACLE® E-Business Suite cle Applications Home Page > Information This notification does not require a response. a have been selected as main appraiser for the app	raisal of Employee	n Navigator ▼ 2, Tom.	Ravorites 🔻	Home Logou	CK Reassign
Cle Applications Home Page > Information This notification does not require a response. I have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Anthony	raisal of Employee	n Navigator 🕶 2, Tom.	Favorites	Home Logou	t Preferences Help OK Reassign
CRACLE® E-Business Suite cle Applications Home Page > Information This notification does not require a response. I have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55	raisal of Employee2	î Navigator ♥ 2, Tom.	🙀 Favorites 🔻	Home Logou	t Preferences Help OK Reassign
CRACLE E-Business Suite Information This notification does not require a response. I have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951	raisal of Employee	î Navigator ♥ 2, Tom.	Favorites	Home Logou	t Preferences Help OK Reassign
CRACLE E-Business Suite Information This notification does not require a response. I have been selected as main appraiser for the appr From Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951 Immary	vaisal of Employee	î Navigator ♥ 2, Tom.	Favorites	Home Logou	t Preferences Help OK Reassign
CRACLE® E-Business Suite cle Applications Home Page > Information This notification does not require a response. L have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951 Immary fective Date 04-Apr-2016 Employee Name Employee	vaisal of Employee	î Navigator ♥ 2, Tom.	Favorites	Home Logou	t Preferences Help OK Reassign
CRACLE E-Business Suite cle Applications Home Page > Information This notification does not require a response. L have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951 Immary fective Date 04-Apr-2016 Employee Name Employee Organization Email Address	vraisal of Employee2	R Navigator ▼ 2, Tom.	Employee N Depar	Home Logou umber 166637 tment Med-Medicin	t Preferences Help OK Reassign
Cle Applications Home Page >  Information  This notification does not require a response.  I have been selected as main appraiser for the app  From Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951  Immary  fective Date 04-Apr-2016 Employee Name Employee Organization Email Address Manager Supervise	raisal of Employee2	R Navigator ▼ 2, Tom.	Employee Nt Depar	Home Logou unber 166637 tment Med-Medicin- Job Staff-Adminis	t Preferences Help OK Reassign e strator.II
Cle Applications Home Page >  Information  This notification does not require a response.  I have been selected as main appraiser for the app  From Supervisor2, Anthony To Su	e2, Tom	R Navigator ▼ 2, Tom.	Employee No Depar	Home Logou umber 166637 tment Med-Medicinu Job Staff-Adminis	t Preferences Help OK Reassign e strator.II
CRACLE E-Business Suite cle Applications Home Page > Information This notification does not require a response. It have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951 Immary Fective Date 04-Apr-2016 Employee Name Employee Organization Email Address Manager Supervis Manager Supervis Manager Comments Hi Mark,	e2, Tom	2, Tom.	Employee N Depar	Home Logou umber 166637 tment Med-Medicin Job Staff.Adminis	t Preferences Help OK Reassign e strator.II
CRACLE E-Business Suite cle Applications Home Page > Information This notification does not require a response. t have been selected as main appraiser for the app From Supervisor2, Anthony To Supervisor2, Anthony To Supervisor2, Mark Sent 04-Apr-2016 11:00:55 ID 14351951 Immary fective Date 04-Apr-2016 Employee Name Employee Organization Email Address Manager Supervis pin Appraiser Comments Hi Mark, As discussed, I have changed the main apprai	e2, Tom or 2, Antwary eser to you since yo	2, Tom.	Employee N Depar	Home Logou umber 166637 tment Med-Medicin Job Staff.Adminis	t Preferences Help OK Reassign e strator.II

## Review Main Appraiser Change Notification

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

DRA	CLE <sup>®</sup> E-Business	Suite		· · ·	
racio Applicat	tions Homo Page > Worklint	<u>.</u>	Navigator V	Favorites V	Home Logout Preferences Help
racie Applica	uons nome Page > Workisi	2			
Informatio	n				
This notifie	cation has been closed and did	not require a response.			
ou nave beel	n selected as main appraiser	for the appraisal of Employee2, I om.			
From	Supervisor2, Anthony				
To	Supervisor2, Mark				
Closed	04-Apr-2016 11:00:55 04-Apr-2016 11:15:28				
ID	14351951				
Responder	Supervisor2, Mark				
Summary					
Effective Da	te 04-Apr-2016				
	Employee Name	Employee2, Tom		Employee Number	166637 Mod Modicino
	Manager	Supervisor2, Anthony		Job	Staff.Administrator.II
Main Apprai	iser Comments				
Hi Mark,					
As discu	ssed, I have changed the n	nain appraiser to you since you will I	be		
complet	ing his review as his super	visor.			
Anthony	,				
Appraisal De	etails				
	Initiator	Employee2, Tom		Main Appraiser Name	Supervisor2, Mark 04-Apr-2016
	Period Start Date	04-Apr-2016		Next Appraisal Date	01741 2020
	Period End Date	30-Jun-2016			
	I emplate	Appraisal-Non-Supervisory Role v3			
Related Ann	lications				
Related App	lications				
Update A	action	>	_		
Related App	ction	>			
E Update A	ction dist	>			
Related App	he Undate h	>	he Sun	ervisor Rev	iew page
eturn to Work	dist he <i>Update</i> b	> outton to open t	he <i>Sup</i> e	ervisor Rev	<i>iew</i> page.
Elated App Update A eturn to Work lick tl	atications atist the <i>Update</i> b <b>CLE</b> * E-Business	) outton to open t	he <i>Sup</i> o	ervisor Rev	<i>iew</i> page.
Update A Update A eturn to Work	dications dist he <i>Update</i> b LE® E-Business	outton to open ti Suite	he <i>Sup</i> o	ervisor Rev	<i>iew</i> page. Home Logout Preferences Help
Update A Update A lick tl	dications ction dist he <i>Update</i> b <b>CLE</b> * E-Business	outton to open the suffe	he <i>Sup</i> o	ervisor Rev Pravottes +	<i>iew</i> page. Home Logout Preferences Help
Elated App Update A eturn to Work lick tl DRAC	dications dist the Update b CLE E-Business visor	outton to open the suite	he <i>Sup</i> o n Navigator <del>-</del>	ervisor Rev	<i>iew</i> page.
Elated App Update A eturn to Work lick tl DRAC	dications dist he Update b CLE' E-Business visor	outton to open ti Suite	he <i>Sup</i> o n <sub>Navigator •</sub>	ervisor Rev	<i>iew</i> page. Home Logout Preferences Help e with Employee Printable Pag
Update A eturn to Work lick tl	Affications ction dist he Update b CLC E-Business visor Employee Name	Suite	he <i>Sup</i> o n <sub>Navigator</sub> •	Ervisor Rev Favorites -	<i>iew</i> page. Home Logout Preferences Help ewith Employee Printable Pay 166637
Update A Lupdate A Lick tl DRAC	Alications dist the Update b CLC E-Business visor Employee Name Organization Email Address	utton to open t Suite	he <i>Sup</i> o n <sub>Navigator</sub> ▼	Ervisor Rev Favories •	<i>iew</i> page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine
Update A Update A lick tl DRAC	Alfractions ction diat the Update b CLC E-Business visor Employee Name Organization Email Address Manager	Putton to open ti Suite Employee2, Tom Supervisor2, Anthony	he <i>Sup</i> गे <sub>Navigator</sub> <del>-</del>	Ervisor Rev Favorites  Favorites  Figure Rumber Engelwer Rumber Department Job	<i>iew</i> page. Home Logout Preferences Help ewith Employee Printable Par 166637 Med: Medicine staff.Administrator.II
Line and a second	Alfractions ction dist he Update b ELE® E-Business visor Employee Name Organization Employee Name Organization Employee Name	Suite Employee2, Tom Supervisor2, Anthony	he <i>Sup</i> o n <sub>Navigator •</sub>	Ervisor Rev Favorites  Favorites  Finder Share Employee Number Department Job	iew page. Home Logout Preferences Help ewith Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II
elated App Update A lick ti DRAC	Alications dist the Update b CLC E-Business visor Crganization Employee Name Organization Employee Name organization Employee Name s	utton to open t Suite Employee2, Tom Supervisor2, Anthony	he <i>Sup</i> r n <sub>Navgator</sub> <del>√</del>	Province - Provence - Update - Update - Update - Department Department Job	<i>iew</i> page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine staff Administrator.II
Related App     Update A     turn to Work     lick tl     ORAC     tails: Super	Alfractions ction diat the Update b CLC E-Business visor Organization Email Address Manager s	Suite Employee2, Tom Supervisor2, Anthony	he Supr	Ervisor Rev Favores • Update • Empoyee Number Department Job	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff.Administrator.II
Related App Update A atum to Work lick ti DRAC stails: Super setup Detail	Alications ction dist he Update b CLC E-Business visor Employee Name organization Employee Name organization Employee Name organization Employee Same Manager s	Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom	he <i>Sup</i> o	Provisor Rev Provines • Update Star Update Star Department Job	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark
Lick tl     DRAC	Alications ction the Update b CLE E-Business Visor Organization E-mployee Name. Organization E-mployee Name. Organization E-mployee Name. Organization E-mployee Name. Organization E-mployee Name. Manager s Initiator s	Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016	he Supe	Ervisor Rev Favorites • Update bhar Engloyee Number Department Department Job Supervisor Appraisel Date Next Appraisel Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff Administrator.II Supervisor2, Mark 04-Apr-2016
Lupdate A	Alications ction dist he Update b ction tion tion ction tion	Employee2, Tom Supervisor2, Anthony Employee2, Tom Supervisor2, Anthony Employee2, Tom 94-Apr-2016 30-Jun-2016 Appr-2016	he <i>Sup</i> o	Ervisor Rev Revortes  Favorites  Fundate  Intervisor Department Job Supervisor Appraisal Date Next Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med Medicine staff Administrator.II Supervisor2, Mark 04-Apr-2016
Belated App     Dydate A     Second Sec	Alications Action dist the Update b CILC E-Business visor Corganization Employee Name Organization Employee Name Corganization Employee Name Corganization Employee Name Corganization Employee Name Pariod Start Data Period Start Data Period Start Data Period Start Data Period Start Data Period Start Data	Employee2, Tom Supervisor2, Anthony Employee2, Tom G4-Apr-2016 Appraisal-Non-Supervisory Role v3	he <i>Sup</i> o R Navgator •	Provisor Rev. Provines • Update Star Update Star Department Job Supervisor Supervis	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Lupdate A     Lupdate A     sturn to Work     Lick tl     DRAC     tails: Super	Alications ction dist the Update b CLE E-Business visor Crganization Employee Name Organization Employee Name Prioritation Employee Na	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 30-Jun-2016 Appraisal-Non-Supervisory Role v3	he Supe	Ervisor Rev Favorites - Update Shar Engiptive Number Department Department Job Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Update A     update A     datum to Work     Uick tl     DRAC     tails: Super     setup Detail	Alications ction dist he Update b Cupdate b Cupdat	Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 30-Jun-2016 Appraisal-Non-Supervisory Role v3	he Supe	Ervisor Rev Revortes  Favortes  Fundation Share Update Share Employee Rumber Department Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Update A     update A     datum to Work     Update A	Alications Action dist the Update b CILC E-Business visor Employee Name Organization Employee Name Organization Email Address Manager s Initiator Period Sart Date Period and Date Period and Date Template ag and Comments	utton to open tl         suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         94-Apr.2016         Appraisal-Non-Supervisory Role v3         Overall Rating	he <i>Sup</i> o R Navgator <del>-</del>	Prooffees Prooffees Update Starr Update Starr Update Starr Update Starr Supervisor Supervisor Supervisor Supervisor Supervisor Supervisor	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Update A     datum to Work     datum to Work     dick tl     DRAC     realls: Superv setup Detail	Alications ction diat the Update b CLC E-Business visor Crganization Email Address Manager s Initiator Appraisal Purpose Manager s Initiator Period End Date Period End Date Period End Date Template ag and Comments	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 30-Jun-2016 Appraisal-Non-Supervisory Role v3 Overall Rating Overall Comments	he Supe	Ervisor Rev Pavortes  Favortes  For the second sec	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
etailes Supervision	Alications ction dist he Update b Cupdate b Cupdat	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 3-Jun-2016 Appraisal-Non-Supervisory Role V3 Overall Rating Overall Commuts Employee Feedback	he <i>Sup</i> t	Ervisor Rev Favorites  Favorites	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Update A     Update A     turn to Work     Uick tl     ORAC     tails: Super	Alications Action dist the Update b CELE E-Business visor Corganization Employee Name Organization Employee Name Organization Employee Name Organization Employee Name Appraisal Purpose Period Start Data Period and Data Period and Data Period and Data Period and Data Period and Data	Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         94-Apr:2016         Appraisal-Non-Supervisory Role         0verall Rating         Overall Comments         Employee Feedback.	he <i>Sup</i> o ñ Navgator <del>-</del>	Proofees Contract Con	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
elated App update A turn to Work lick tl DRAC tails: Super setup Detail overall Ratir	Alications ction dat the Update b CLC E-Business visor Organization Email Address Manager s Initiator Appraisal Purpose Manager s ag and Comments	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 30-Jun-2016 Appraisal-Non-Supervisory Role v3 Overall Rating Overall Rating Overall Comments Employee Feedback	he Supe	Ervorte Favorte Favorte Update Share Department Department Department Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Update A     data       data      data        data        data        data        data        data        data        data        data         data         data          data           data	Alications ction dist he Update b ction dist he Update b ction creation Enables Manager s Initiator Appraisal Purpose Penod Sart Date Penod Sart	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom 04-Apr-2016 30-Jun-2016 Appraisal-Non-Supervisory Role V3 Overall Rating Overall Rating Overall Comments Employee Feedback	he Supt	Ervisor Rev Roontes  Favorites  Favorites  Fundation Share Uppdate Share Uppdate Share Department Sob Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Produce A App     Decision App	Alications Action dist the Update b CILE E-Business visor Corganization E-mail Address Manager S Initiator Appraisal Purpose Period Start Data Period and Data Period and Data Period and Data Period and Data Period and Data Period and Data S S S S S S S S S S S S S	utton to open tl         Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         94-Apr:2016         Appriatal-Non-Supervisory Role         30-Jun:2016         Appriatal-Non-Supervisory Role         Supervisor Rele         Overall Rating         Overall Comments         Employee Feedback	he Sup R Navgator -	Proofees Contract Con	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Lupdate A     App     Appendix A     Appendix	Alications Close C	Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         04-Apr-2016         AppraIsal-Non-Supervisory Role         V3         Overall Rating         Overall Comments         Employee Feedback	he Supe	Ervorte Provente Provente Update Share Update Share Department Department Department Supervisor Appraisal Date	iew page. Home Logout Preferences Help ewith Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 0+Apr-2016
Declared App Dydate A durin to Work lick til DRAC trails: Superior acturp Detail Detail Declarit	Alications ction dist the Update b Clear E-Business visor Crganization Employee Name Organization Employee Name Organization Employee Name Organization Employee Period Start Data Period Start	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom OP-Apr-2016 Appraisal-Non-Supervisory Role V3 Overall Rating Overall Comments Employee Feedback	he Supt	Ervisor Rev Favorites  Favorites  Favorites  Share Update Share Department Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Line and a second	Alications ction dist the Update b CILC E-Business visor Corganization E-mail Address Manager s Initiator Appraisal Purpose Period Start Data Period and Data Period Ali Details etency omposure etension Manager Period Ali Details Period Ali Details	utton to open tl         Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         94-Apr-2016         Appraisal-Non-Supervisory Role         30-Jun: 2016         Overall Rating         Overall Comments         Employee Feedback	he Sup R Navgator -	Proofees Proofees Update Star Update Star Update Star Department Job Supervisor Supervisor Supervisor Supervisor Supervisor Supervisor	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Lupdate A     App     Lupdate A     Aturn to Work     Lick tl     DRAC     Aturn to Work     Lick tl     DRAC     Aturn to Work     Lick tl     DRAC     Aturn to Work     Aturn to Work     Lick tl     DRAC     Aturn to Work     Aturn     Aturn to Work     Aturn	Alications Close C	Suite Suite Employee2, Tom Supervisor2, Anthony Employee2, Tom Od-Apr-2016 Appraisal-Non-Supervisory Role v3 Overall Rating Overall Rating Employee Feedback	he Sup Ravgator •	Ervisor Rev Revortes  Favortes  Fundate Share Update Share Department Supervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff Administrator.II Supervisor2, Mark 04-Apr-2016
Protect of the second sec	Alications  ction  dist  he Update b  cLe* E-Business  visor  Organization Employee Name Organization Employee Name Organization Employee Name Period Sart Data	Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         91-30-2016         Appraisal-Non-Supervisory Role         30-30-2016         Overall Rating Overall Comments         Employee Feedback	he Supt	Ervisor Rev Favores  Favores  Cupdate Star Update Star Supervisor Supervis	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
	Alications Clips C	Suite         Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         04-Apr-2016         Appratsat+Hom-Supervisory Role         V3         Overall Rating         Overall Comments         Employee Feedback         Coverall Rating         Overall Comments         Employee Feedback	he Supe	Ervisor Rev Favores • Update • Share Update • Share Department Department Supervisor Supervisor Supervisor Next Appraisal Date	iew page. Home Logout Preferences Help ewith Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Lupdate A     App     Appendix A     Appendix	Alications  Alications  Alications  Alications  Alication  Alicati	Suite         Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         04-Apr-2016         -Dur-2016         -Dur-2016         Overall Rating         Overall Comments         Employee Feedback	he Supt	Ervisor Rev Favorites  Favorites  Cuppervisor Appraisal Date	iew page. Home Logout Preferences Help e with Employee Printable Par 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Product App Update A turn to Work Iick tl DRAC trails: Super- ietup Detail ownet Ratir ownet Ratir ownet Ratir ownet Ratir ownet Ratir ownet Ratir Show Core.C Show Core.C	Alications  Action  Ac	Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         Supervisor2, Anthony         Overall Rating         Overall Comments         Employee Feedback	he Supt	Provisor Rev.	iew page. Home Logout Preferences Help e with Employee Printable Pay 166637 Med-Medicine Staff.Administrator.II Supervisor2, Mark 04-Apr-2016
Competencia  Comp	Alications Alications Alications Alications Alication Alication Appression Ap	Suite         Suite         Employee2, Tom         Supervisor2, Anthony         Employee2, Tom         Op-Apr-2016         AppraIsal+Non Supervisory Role         3D-Jun-2016         Overall Rating         Overall Rating         Employee Feedback	he Supe	Ervisor Rev Review	iew page. Home Logout Preferences Help ewith Employee Printable Par 166637 Med-Medicine staff.Administrator.II Supervisor2, Mark 0+Apr-2016

5.

# Supervisor: Changing Main Appraiser

**Review Main Appraiser Change Notification and Complete Appraisal** 

6. Click on *Update Appraisal* button.

		_ <b>————————————————————————————————————</b>	isiness	Suite	-	🔒 Na	vigator 🔻	😽 Favorites 🔻		Home Loc	out Preferences	Help
Details: \$	Supervisor	>					-					
Supervi	sor Review	v										
	Or	Employe ganization Email I	e Name Address Manager	Employee Superviso	2, Tom vr2, Anthony		Share w	<b>ith Employee</b> Employee De	Updat e Number epartment Job	e Appraisal 166637 Med-Medi Staff.Adm	Submit for cine inistrator.II	Approval
Setup	Details											
		Appraisal -	Initiator Purpose Status Femplate	Employee Appraisa v3	e2, Tom I-Non-Supervisor	y Role		Si Appra Next Appra	upervisor isal Date isal Date	Supervisor 04-Apr-20	Change Main A 2, Mark 16	oppraiser
Overal	ll Rating a	and Comments										
Manag	je Particip	pants		Overa Overall Co Employee F	all Rating omments Feedback							
Add P	articipant	t										
Select F	F <b>ull Name</b> No results Tound.	Participation Type	Quest	ionnaire	Participation Status	Last Notified Date	Date Complete	ed Comment	s Update	Delete		
Compe	etencies		_						_			
Show Al	I Details	Hide All Details										
Details	Competer	ncy						Supervisor Per	formanc	e Rating		
F Show	Core.Decis	ion Making										
F Show	Core.Initiat	ting Action										
E Show	Core.Inter	personal Commun	nication									
+ Show	Core.Job K	nowledge/Function	onal and	Technical Sk	tills							

- 7. Refer to the chapters at the beginning of this guide for information about competing the performance appraisal process.
- 8. 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

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.

```
        PRISM Workflow...
        FYI: The appraisal of Employee1, Chris needs your attention as appraiser.

        From
        Supervisor1, Pat To
        Bird, Karen
```

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.

Wed 4/13/2016 5:49 PM		100 - 10						
PRISM Workflow Maile	PRISM Workflow Mailer - DEV <noreplyprism@pltt.edu></noreplyprism@pltt.edu>							
FYI: The appraisal of Employee	e1, Chris needs your attention as a	ppraiser.						
To Bird, Karen								
If there are problems with how this message is display	ved, click here to view it in a web browser.							
From Supervisor1, Pat To Bird, Karen Sent 13-Apr-2016 17:46:51 ID 14356912								
Summary								
Effective Date 13-Apr-200 Employee Name	Employee1, Chris	Employee Number	166670					
Organization Email Address	kbird@cfo.pitt.edu	Department	Financial Information Systems					
Manager	Supervisor1 Pat	lob	Staff Administrator III					
Main Appraiser Comments								
Since you were Chris' supervisor for half of you would evaluate his performance while	the year, I would appreciate it if be reported to you							
you would evaluate his performance while	ne reported to you.							
Inanks,								
Pat	)							
Appraisal Details								
Appraisal Purpose	Employee1, Chris	Main Appraiser Name Appraisal Date	13-Apr-2016					
Period Start Date Period End Date	21-Mar-2016 30-Apr-2016	Next Appraisal Date						
Template	Appraisal-Non-Supervisory Role v3							
Related Application								
Update Action								

2. Click the *Update Action* icon in the bottom left corner to open the *Appraisal*.

T de			
Appraisal Details			
Initiator	Employee1, Chris	Main Appraiser Name	Supe
Appraisal Purpose		Appraisal Date	13-A
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			

3. If prompted, log in with your University user name and password and click the *Submit* button.

	1000	Single Sign-On Experience
Username		
abcdefg		
Password		
•••••		

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.

8 Error
You have insufficient privileges for the current operation. Please contact your System
Administrator.

5. When the *Appraiser Details* page opens, review the details of the employee to be evaluated.

	ss Suite			
	🔒 Navigator 🗸	🙀 Favorites 🔻	Home Logout	Preferences Help Personalize Page
Information     The current responsibility context has	heen switched to: PHR Perfor	mance Management - 9	Supervisor	
The current responsibility context has	been sweened to. This Ferror			
Details: Appraiser		Switch R	esponsibility   PHR Perfo	rmance Management - Supervisor 💌
			Back	Update Printable Page
Employee Name Organization Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat		Employee Number Department Job	166670 Financial Information Systems Staff.Administrator.III
Setup Details				
Initiator Appraisal Purpose Period Start Date Peniod End Date Template	Employee1, Chris 21-Mar-2016 30-Apr-2016 Appraisal-Non-Supervisor v3	y Role	Main Appraiser Appraisal Date Next Appraisal Date	Supervisor1, Pat 13-Apr-2016
Show All Details Hide All Details			Annraiser Performan	ice Rating
Show Core.Composure			Appraiser renormal	ice Racing
Show Core.Decision Making				
Show Core.Initiating Action				
Show Core.Interpersonal Communication	in			
+ 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				
			Back	Update Printable Page
	Home Logout Pre	ferences Help <u>Perso</u>	nalize Page	
About this Page				Copyright (c) 2006, Oracle. All rights reserved

Copyright University of Pittsburgh. All rights reserved.

6. Click the *Update* button to complete the appraisal.



7. The *Appraiser Appraisal Feedback* page will open. Click the *Update Details* icon beside the first competency.

ORACLE <sup>®</sup> E-Busi	ness Suite		
f	Navigator 🔻 🛛 🥁 Favorit	es ▼ Home Logout Pref	Personalize erences Help Page
Details: Appraiser >			
Appraisal Feedback: Appraiser			
		Cancel	Save as Draft Complete
Employee Name Organization Email Address Manager	Employee1, Chris kbird@cfo.pitt.edu Supervisor1, Pat	Employee Number Department Job	166670 Financial Information Systems Staff.Administrator.III
Setup Details			
Initiator Appraisal Purpose Period Start Date Period End Date Template	Employee1, Chris 21-Mar-2016 30-Apr-2016 Appraisal-Non-Supervisor Role v3	Main Appraiser Appraisal Date Next Appraisal Date Y	Supervisor1, Pat 13-Apr-2016
Competencies			
Competency		Appraiser Performance Rating	Update Details
Core.Composure		j)	
Core.Decision Making		j)	
Core.Initiating Action		<u> </u>	/
Core.Interpersonal Communication 🕦		<u>i</u>	/
Core.Job Knowledge/Functional and T	echnical Skills		/
Core.Organizing and Planning 🕦	-		2
Core.Quality of Work			/
Core.Service Orientation 👔			/
Core.Work Habits			/
Overall Feedback The Employee (Appraisee) sees thes on appraisal completion. Comments	e comments if the Superviso	r (Main Appraiser) selects to share parl	ticipant ratings and comments
		Connect	Save as Draft Complete
		Cancei	save as brare complete
	Home Logout Preferer	cance <u>r</u> nces Help Personalize Page	complete

8. 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					
		Cance <u>l</u>	Save as Draft	Apply and	d Update Next Apply
Competency	Core Composure				
Behavioral Indicator	Behavioral Factors for Cor Maintains effective perform Copes effectively and deve Presents a positive disposistress.	<b>nposure:</b> mance under p elops effective ition and maint	ressure. approaches to dea ains constructive i	al with pressure nterpersonal re	e or stress. elationships when under
Rate Appraisee On This	Competency				
Examples MUST be incl Development." Competency Name Core Performance Rating	.Composure	if the Perfor	nance Rating is	"Unsatisfacto	ory" or "Needs
Comments			Perfo	mance Rating	Scale
			Step	Pating Scale	Pohavioral Indicator
			1	Unsatisfactory	Employee must demonstrate improved work performance
					within immediate period of time (e.g., 3 months).

9. Select the rating for the competency from the drop-down list in the *Performance Rating* field.

Com	petency Name Core.	Composure		our de		
	Performance Rating Comments	1-Unsatisfactory		Perform	nance Rating s	Scale
		3-Successful	^			
		5-Exceptional	)	Step Value	Rating Scale	Behavioral Indicator
			~	1	Unsatisfactory	Employee must demonstrate improved work performance within immediate period of time (e.g., 3 months).

10. In the *Comments* box enter examples to support the performance rating.

	Cance!         Save as Draft         Apply and Update Next         Apply
Competen	cy Core.Composure
Reuaviotai Tudicar	<ul> <li>Behavioral Factors for Composure:</li> <li>Maintains effective performance under pressure.</li> <li>Copes effectively and develops effective approaches to deal with pressure or stress.</li> <li>Presents a positive disposition and maintains constructive interpersonal relationships when under stress.</li> </ul>
Rate Appraisee On T	his Competency
Consider the Behav Examples should be	ioral Factors listed above when determining the Performance Rating for this competency. included in the <i>Comments</i> box.
Examples MUST be in Development."	cluded in the <i>Comments</i> box if the Performance Rating is "Unsatisfactory" or "Needs
Competency Name Co	pre.Composure
Competency Name Construction Co	3-Successful
Competency Name C Performance Rating Comments	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 source of the period. Chris was ablocks. During the
Competency Name C Performance Rating Comments	Step Value Rating Scale Behavioral Indicator

11. When finished rating this competency, click the *Apply and Update Next* button to rate the next competency.

Competency Details	
Cano	Save as Draft Apply and Update Next Apply
Competency Behavioral Indicator	Core.Composure
	Behavioral Factors for Composure:

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.

ORACL					
	🏦 Navigator 🔻	🙀 Favorites 🔻	Home Logout	Persor Preferences Help Page	
Details: Appraiser >	Appraisal Feedback: Appraiser	>			
Competency Details					
			Cance! Sav	e as Draft Apply	
Competen	cy Core.Work Habits				
Benavioral Indicat	or				
	Conducts work within     Conducts work accord	work Habits: the established (and a ing to the established a	ccepted) department p and approved work sch	ractices. edule.	

- 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 <sup>®</sup> E-Bus	siness Suite			
1	🖥 Navigator 🔻 🛛 🕞	🖡 Favorites 🔽	Home Logout Pr	Personal eferences Help Page
Details: Appraiser >				
Appraisal Feedback: Appraiser				
			Cancel Sav	e as Draft Complet
Employee Name Organization Email Address	Employee1, Chris kbird@cfo.pitt.edu		Employee Number 1 Department F	.66670 inancial Information Systems Vaff Administrator III
Manager	Supervisor1, Pac		100 5	
Setup Details				
Initiator Appraisal Purpose Period Start Date Period End Date Template	Employee1, Chris 21-Mar-2016 30-Apr-2016 Appraisal-Non-Su Role v3	pervisory	Main Appraiser s Appraisal Date : Next Appraisal Date	Supervisor1, Pat 13-Apr-2016
Competencies				
Competency Core.Composure		Appraiser 3-Success	Performance Rating	Update Details
Core.Decision Making		3-Success	iulo.	
Core.Initiating Action (1)		4-Above E	xpectations	
Core.Interpersonal Communication (	)	3-Success	iul 🕤	
مے Core.Job Knowledge/Functional and	Technical Skills 👔	3-Success	ful 😱	
Core.Organizing and Planning 👔		3-Success	ful 👔	
Core.Quality of Work		3-Success	ful 👔	
Core.Service Orientation 👔		3-Success	iul 👔	
Core.Work Habits		3-Success	ful 👔	
Overall Feedback The Employee (Appraisee) sees the comments on appraisal completion. Comments	ese comments if the	Supervisor (Main App	raiser) selects to share p	articipant ratings and
pout this Page	Home Logout P	references Help P	Cancel Sav	t (c) 2008. Oracle. All rights ras

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.



- 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.

ORACL	<b>E<sup>*</sup>E-Business Suite</b>		it Preferences He	Personalize Ip Page
Appraisal Feedback: Co	mplete			
Once you click Submi for feedback.	;, you cannot make further changes unle	is the main appraiser requ	Cancel	Sub <u>m</u> it
Notification Comments	I have completed my review of Chris' perform need any clarification or additional information Regards, BB	nance. Please let me know n.	if you	

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.

ORACL	<b>€</b> °E-Business Suite			
	🔒 Navigator 🗸	🔒 Favorites 🕆	Home Logout Pre	Personalize ferences Help Page
Appraisal Feedback: Co	mplete			
for feedback.	I have completed my review	of Chris' performance. I	Please let me know if you	Cancei Submit
	need any clarification or addit Regards, BB	tional information.		
	I			

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 Maile FVI: The appraisal of Employe To Bird, Karen I) If there are problems with how this message is displa	er - DEV <noreplyprism@p e1, Chris needs your attention as re yed, click here to view it in a web browser.</noreplyprism@p 	itt.edu> viewer.	
Action Items			+ Get more ar
From Supervisor1, Pat To Employee2, Robin Sent 14-Apr-2016 12:05:52 ID 14356988 Summary			
Effective Date 13-Apr 2010 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
Main Appraiser Comments           Please provide your thoughts on working y relates to the competencies list on the app Thank you, Pat           Appraisal Details         Initiator Appraisal Purpose Period Start Date Period Start Date Period Start Date	with Chris on the QTAC project as it raisal form. Employee1, Chris 21-Mar-2016 30-Aor-2016	Main Appraiser Name Appraisal Date Next Appraisal Date	Supervisor1, Pat 13-Apr-2016
Related Applications	Appraisal-Non-Supervisory Role v3		

2. Click the *Update Action* icon in the bottom left corner to open the Appraisal.

rau				
Appraisal Details				
A	Initiator ppraisal Purpose Period Start Date Period End Date Template	Employee1, Chris 21-Mar-2016 30-Apr-2016 Appraisal-Non-Supervisory Role v3	Main Appraiser Name Appraisal Date Next Appraisal Date	Supe 13-A
Pelated Applications				

# Participating as an Additional Reviewer

3. If prompted, log in with your University user name and password and click the *Submit* button.

	1000	 Single Sign-On Experienc
Username		
abcdefg		
Password		
••••••		

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 Administrator.	System

5. When the *Reviewer Details* page opens, review the details of the employee to be reviewed.

	uite			
		🏦 Navigator 👻	🍙 Favorites 🔻	Home Logout Preferences Help
Information     The current responsibility context has been	switched to: PHR Performance Management	- Employee		
Details: Reviewer				
Employee Name Organization Email Address Manager	Employee1, Chris <u>kbird@cfo.pit.edu</u> Supervisor1, Pat		Employee Number Department Job	Back Update Printable Page 166670 Financial Information Systems Staff.Administrator.III
Competencies				
Show All Details Hide All Details Competency Core.Decision Making Core.Initiating Action Core.Job knowledge/Functional and Technical S Core.Organizing and Planning Core.Organizing and Planning Core.Service Orientation Core.Service Orientation Core.Service Orientation	kills			
Overall Feedback				
Comments				
				Back Update Printable Page
	Home Logout Pre	ferences Help		Copyright (c) 2006, Oracle. All rights reserved

6. Click the *Update* button to complete the review.



7. 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.

	🙃 Navigator '	🕶 🏩 Favorites 🕶 🛛 🛛 H	ome Logout Preferences Help				
Details: Reviewer >							
Appraisal Feedback: Reviewer							
		Cancel	Save as Draft Complete				
Employee Name	Employee1, Chris	Employee Number	166670				
Organization Email Address	<u>kbird@cfo.pitt.edu</u>	Department	Financial Information				
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.

Compatencies	
competencies	
Show All Details   Hide All Details	
Competency	
Iore.Composure	
Lore-Decision Making	
Lore.Initiating Action	
Iore.Interpersonal Communication	
Iore.Job Knowledge/Functional and Technical Skills	
Core.Organizing and Planning	
Iore.Quality of Work	
Iore.Service Orientation	
Lore, Work Habits	
Overall Feedback	
The Employee (Approace) sees these companys if the Supervisor (Main Approace) selects to share participant ratios and company	onte
The chiployee (Appraise) sees these comments in the supervisor (Main Appraiser) selects to share participant ratings and comme on appraised completion.	rits
Comments	
Cance! Save as Draft Comp	olete
Home Logout Preferences Help	
Copyright (© 2006, Oracle. All right	s resen

# Participating as an Additional Reviewer

8. After the review is completed, click the *Complete* button to finalize the review. Overall Feedback



- 9. To finish the review later, click the *Save as Draft* button.
- 10. 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.

A	🔒 Navigator 🗸	🙀 Favorites 🔻	Home	Logout	Preferences	Help	
Appraisal Feedback: Co Once you click Submit requests for feedback	mplete :, you cannot make further change :.	s unless the main appraise	r	Car	nce <u>l</u> Sul	o <u>m</u> it	
Notification Comments	I have completed the review of Chris. Please let me know if you would like a Regards, Robin	any additional information.	.4				

NOTE: Once the *Submit* button is pressed, no further changes can be made to the appraisal unless the supervisor requests additional feedback.

11. Click the *Submit* button to return the appraisal to the supervisor.

	📅 Navigator 🗸	😝 Favorites 🔻	Home	Logout	Preferences	Help	
Appraisal Feedback: Co Once you click Submit requests for feedback	mplete t, you cannot make further changes c.	unless the main appraise	r	Car	nce <u>l</u> Sub	omit	
Notification Comments	I have completed the review of Chris. Please let me know if you would like a Regards, Robin	ny additional information.					

12. Once the *Submit* button is clicked, work as an additional reviewer is complete.