


**Oracle Performance: Completing
Mid-Year Evaluations**



Training Agenda

- Implementation Timelines and Major Milestones
- Job Aides/Demonstration
 - Employee Completing Self-Evaluation
 - Manager Completing Mid-Year Evaluation
- Action Items



This training will be recorded for future use.

Timeline for Management/Executive Pay Plan Positions

July 1—August 31, 2023: Complete and close out current performance evaluations for cut-over to new performance cycle using existing forms and the new Document of Records submission process.

July 1—August 31, 2023: Enter goal plans in Oracle Performance for the **new July 1, 2023-June 30, 2024, evaluation cycle.**

July 1, 2023—May 1, 2024: Employee and Manager have goal conversations/periodic check-ins.

Quarterly check-ins are encouraged but not required.

December 1-31, 2023: Employee and Manager complete mid-year reviews.

Mid-year reviews are required.

May 1-30, 2024: Employee completes self-evaluation of competencies and performance; Manager writes performance evaluation.

Employee self-evaluation is encouraged but not required.

Manager finalizes evaluation and submits for next-level approval.

Next-level approval obtained.

May 30—June 15, 2024: Calibration process completed.

June 15-July 1, 2024: Share performance documents.

July 15, 2024: Provide final feedback.

Timeline for General Pay Plan Positions

- **September 2023:** Distribute revised timeline and new performance evaluation template for informational purposes.

Offer informational sessions to discuss transition. Dates for scheduled sessions are available at: okc.gov/employees.

Complete current evaluations when due using existing forms and the new Document of Records submission process in Oracle.

- **Beginning October 1, 2023:** Enter goals into Oracle Performance.

- **Beginning January 1, 2024:** Transition to online completion of performance evaluations for evaluation period of January 1 - December 31, 2024.

- **January 1 - November 30, 2024:** Employees and Managers have goal conversations/periodic check-ins. *Quarterly check-ins are encouraged but not required.*

- **June 1 - 30, 2024:** Employees and Managers complete mid-year reviews. *Mid-year reviews are encouraged but not required.*

- **December 1 - 31, 2024:** Employees complete self-evaluations of competencies and performance; Managers write performance evaluations. *Employee self-evaluations are encouraged but not required.*

- **December 1 - 31, 2024:** Managers finalize evaluations and submit for next-level approvals.

Next-level approvals are obtained.

Performance documents are shared with employees.

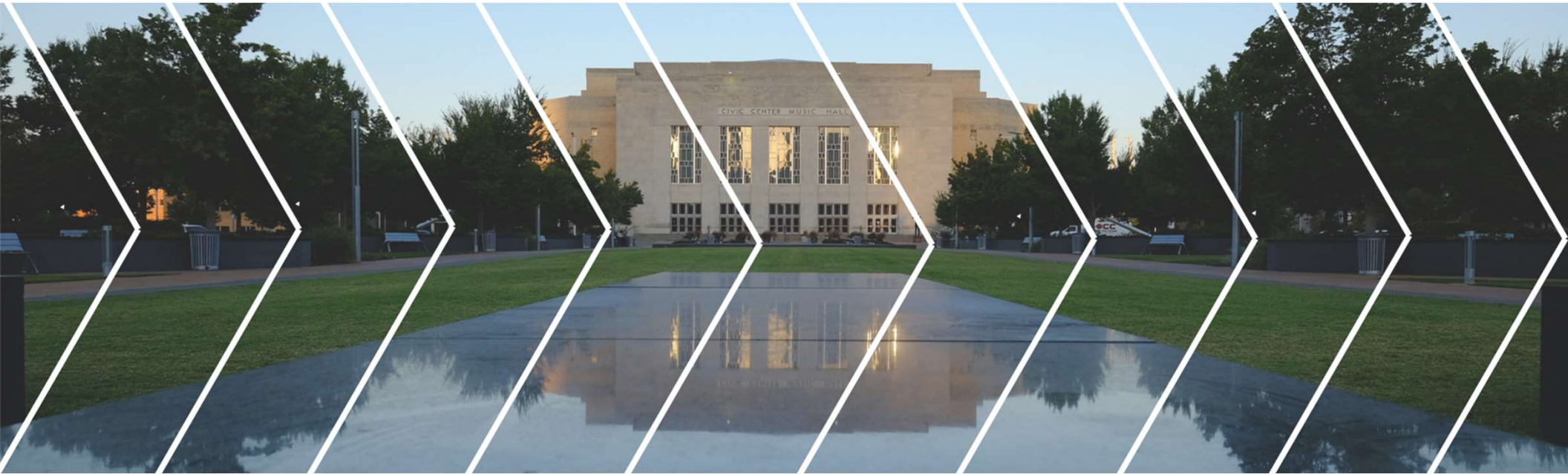
- **March 1, 2025:** *Grace period if needed for completion*—All performance evaluations must be completed and new goals established for the next review period no later than March 1, 2025.

- **January 1 - December 31, 2025:** Next review period

Major Milestones

Executive, Management, and General Pay Plan Positions

Review Periods	
Executive/Management Pay Plans	July 1, 2023, to June 30, 2024
General Pay Plan	January 1, 2024, to December 31, 2024
Mid-Year Reviews	
Executive/Management Pay Plans	December 1 - 31, 2023 (Required) (documents created November 30th after end of business)
General Pay Plan	June 1 - 30, 2024 (Recommended)
End-Year Reviews	
Executive/Management Pay Plans	May 1 - 30, 2024 (Employees Complete Self-Evaluations; Managers Complete Evaluations and Submit for Approval) May 30 - June 15, 2024 (Calibration Process) June 15 - July 1, 2024 (Performance Reviews Shared) July 15, 2024 (Final Feedback Provided)
General Pay Plan	December 1 - 31, 2024* (Employees Complete Self-Evaluations; Managers Write End-Year Reviews; Submit for Approval; Performance Reviews Shared) *March 1, 2025 (Grace Period for Submission if Needed)



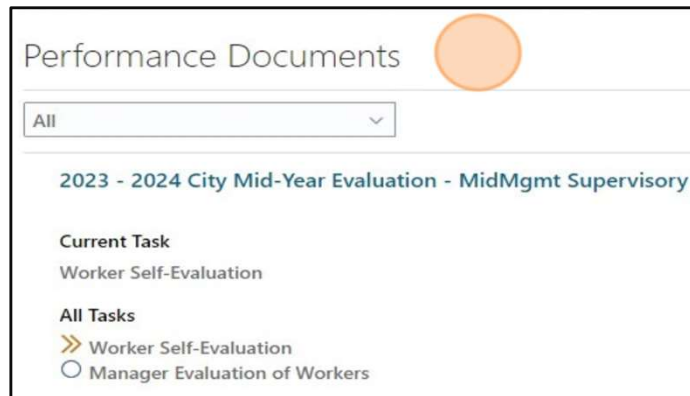
Mid-Year Review: Employee Completion of Self-Evaluation

Employee Self-Evaluation

- > Click on **Company Single Sign-On**.
- > Click on **Me**.
- > Click on **Career and Performance**.
- > Select the **Performance** tile.



- > Select a **Review Period** from the drop-down list. The review period will be **2023 July - 2024 June MGT/EXEC**.
- > Notice the **Current Task** is **Worker Self-Evaluation**.
- > Click on the **2023-2024 City Mid-Year Evaluation - ***.
(*This may be listed as Executive, Mid-Mgmt Supervisory or Mid-Mgmt Non-Supervisory, depending on job classification.)



Job Aide

1 Review and evaluate the contents of each section of the evaluation. Click submit when you're done.

Document Details Edit

Performance Document Name 2023 - 2024 City Mid-Year Evaluation - MidMgmt Supervisory	From Date 07/01/2023
Evaluated By AIMEE MADDERA	To Date 06/30/2024
Review Period 2023 July - 2024 June MGT/EXEC	

Overall Summary Edit

Employee Comments

Show Additional Info

Evaluation Topics

Performance Goals	Evaluate
Employee Comments	
Competencies	Evaluate
Employee Comments	
Development Goals	Evaluate
Employee Comments	
Questionnaire	Evaluate

Attachments

Document Details

> Click on **Document Details** to view information about the review.

> The **Performance Document Name** will be 2023 City Mid-Year Evaluation - * (depending on the pay plan type/competency grouping).

> The **Review Dates** will be **From 07/01/2023 To 06/30/2024**.

Job Aide

i Review and evaluate the contents of each section of the evaluation. Click submit when you're done.

Document Details ▼

Overall Summary Edit ^

Employee Comments

Show Additional Info

Evaluation Topics ^

Performance Goals	Evaluate
Employee Comments	
Competencies	Evaluate
Employee Comments	
Development Goals	Evaluate
Employee Comments	
Questionnaire	Evaluate

Attachments ▼

Evaluation Topics

> There are three evaluation topics: **Performance Goals, Competencies, and Development Goals.**

> To begin the employee self-evaluation, click the **Evaluate** box for **Performance Goals.**

Job Aide

Rate and Comment

 Evaluate the included performance goals.

Sort By Last Updated-Latest to Oldest

Customer Service

Provide opportunities for continuous feedback from departments, City employees, and external applicants

Status	Weight
Not started	%

Basic Info

Goal Name

Customer Service

Description

Provide opportunities for continuous feedback from departments, City employees, and external applicants

Status

Not started

Target Completion Date

06/30/2024

Start Date

07/01/2023

Source

Worker

Weight

0%

Last Update

DEBORAH BOYER 07/21/2023

Success Criteria

(1) Biannual customer service meetings held with departments (external customers)

(2) Biannual one-on-ones held with all divisional staff and biweekly one-on-ones held with direct reports (internal customers)

(3) 80% overall satisfaction rating on Human Resources divisional customer survey administered immediately following service delivery to City employees

Start Date

07/01/2023

Status

In progress

Target Completion Date

06/30/2024

Weight

Success Criteria

Job Aide

Goal Details

> Click on **Performance Goals** to view goal details (Customer Service goal name shown as example).

> Some goals can be edited to change the **Status** from *Not Started* to *In Progress* or *Completed* or to change the **Weight** assigned to the goal.

> Some fields are disabled from editing and will be displayed in gray (see example shown).

> Click **Save** to save any edits and click **<** next to your photo in the upper left corner to navigate back to **Evaluation Topics**.

Talent Management

Develop City-wide talent review, succession planning, and people development in order to grow next generations of leaders.

Status	Weight
Not started	%

Show Additional Info

[Load More Items](#) 1-10 of 10 items

Summary

Employee Comments

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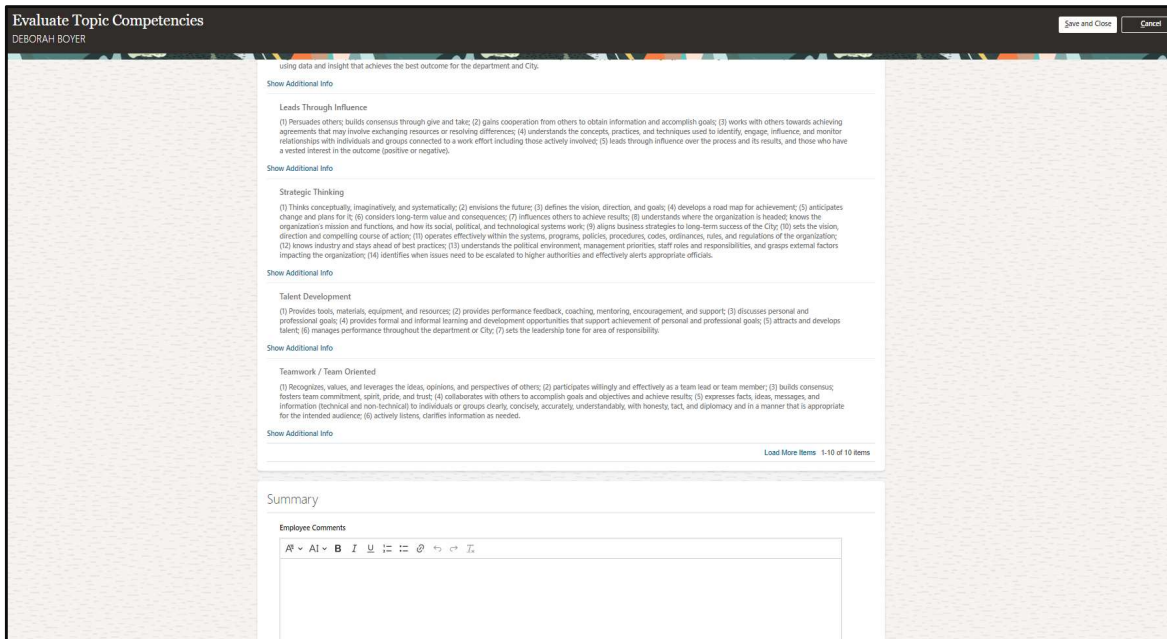
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Show Additional Info

Evaluation of Performance

- > Click on the **Evaluate** button to complete the employee self-evaluation of the **Performance Goals** topic area.
- > Each **Evaluation Topic** has a **Summary** field at the bottom of the screen for **Employee Comments**.
- > Employees are encouraged to provide examples of work performed/completed that best support their self-evaluation.
- > Complete the employee self-evaluation of the topic area by clicking on **Save and Close**.

Job Aide



Evaluation of Competencies

- > Click to evaluate the next **Evaluation Topic** area (**Competencies**). Assigned competencies with definitions will display.
- > Enter employee comments in the **Summary** section at the bottom of the page.
- > Employees are encouraged to provide examples that best support their proficiency in each competency.

Job Aide

Rate and Comment

i Evaluate the included development goals.

Sort By

Leadership
The MetroTech LEAD program will help further develop my leadership skills. Enrollment opens in January 2024.
Show Additional Info

Conducting Talent Reviews
Identify available training and complete training in conducting talent reviews.
Show Additional Info

Creating and Managing Internship Programs
This course will provide foundational information to achieve a performance goal of creating and internship program for the City.
Show Additional Info

Summary

Employee Comments

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Evaluation of Development Goals

- > Click to evaluate the next **Evaluation Topic (Development Goals)** if goals were entered.
- > Enter **Employee Comments** in the **Summary** section at the bottom of the page.
- > Employees are encouraged to provide accomplishments/achievements/progress made toward achievement of their development goals.

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Development Goals

Evaluate

Employee Comments

Questionnaire

Evaluate

My Questionnaire

How are you progressing on your goals?

In what areas do you think you are excelling?

Are there any performance areas you think need improvement?

What can I do to best support you in your work?

Are there professional growth opportunities you would like to explore such as training, certifications, or skills you are interested in developing?

Do you have feedback for me?

Feedback Questionnaire

- > Below the three evaluation topics, you will see **Questionnaire**.
- > Click on the **Evaluate** box and complete the **Employee Feedback Questionnaire**.
- > Click on **Save and Close** button to save your responses.

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Overall Summary

Save Cancel

Employee Comments

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Words: 0 Characters (with HTML): 0

Document Details

Overall Summary Edit

Employee Comments

Show Additional Info

Evaluation Topics

Performance Goals Evaluate

Employee Comments

Competencies Evaluate

Employee Comments

Development Goals Evaluate

Employee Comments

Questionnaire Evaluate

Attachments

Overall Summary

> Once you've finished evaluating Performance Goals, Competencies, Development Goals and have completed the Questionnaire, click on the **Evaluate** box and complete the **Overall Summary**.

> Click on **Submit**.

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Warning

You haven't completed all Comments. (HRA-960447)
If you continue, the performance document will be submitted with incomplete Comments in the following evaluation topics:
Development Goals, Overall Summary. Do you want to continue?

Yes

No

Warning

- > A **Warning** screen may display upon **Submit** if comments are not entered in each section. Some sections may not have been completed by the employee (e.g., Development Goals), and the Warning will still display.
- > Click **No** to go back and complete missing sections or **Yes** to move forward with submission.

Job Aide

Performance Documents

All

2023 - 2024 City Mid-Year Evaluation - MidMgmt Supervisory

DEBORAH BOYER

Current Task

Manager Evaluation of Workers

Task Completion



All Tasks

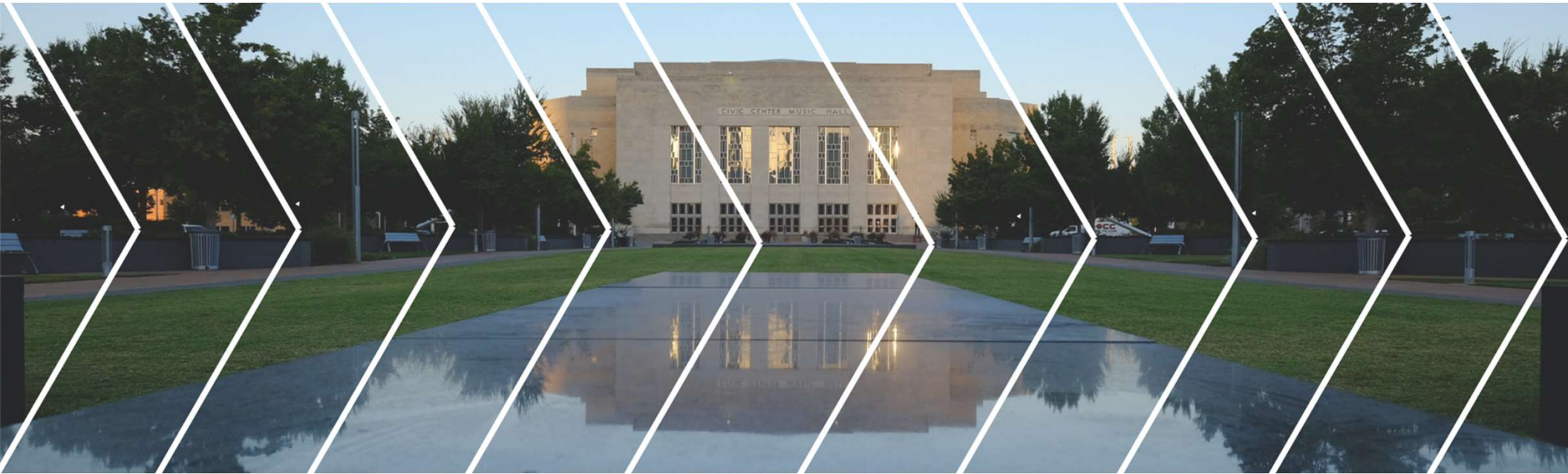
✔ Worker Self-Evaluation

>> Manager Evaluation of Workers

Status Reflects Progress

- > The Performance Documents section now shows that the **Worker Self-Evaluation** has been completed.
- > The next task to be performed is the **Manager Evaluation of Workers**.

Job Aide



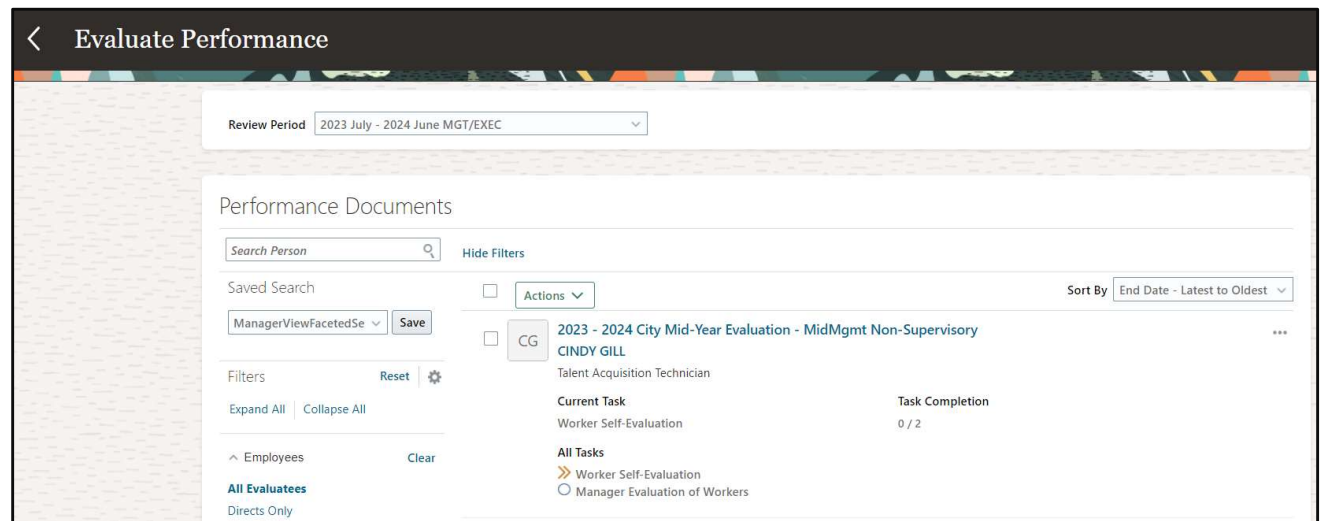
Mid-Year Review: Manager Evaluation

Mid-Year Reviews

- > Click on **Company Single Sign-On**.
- > Click on **My Team**.
- > Click on the **Performance** tile.

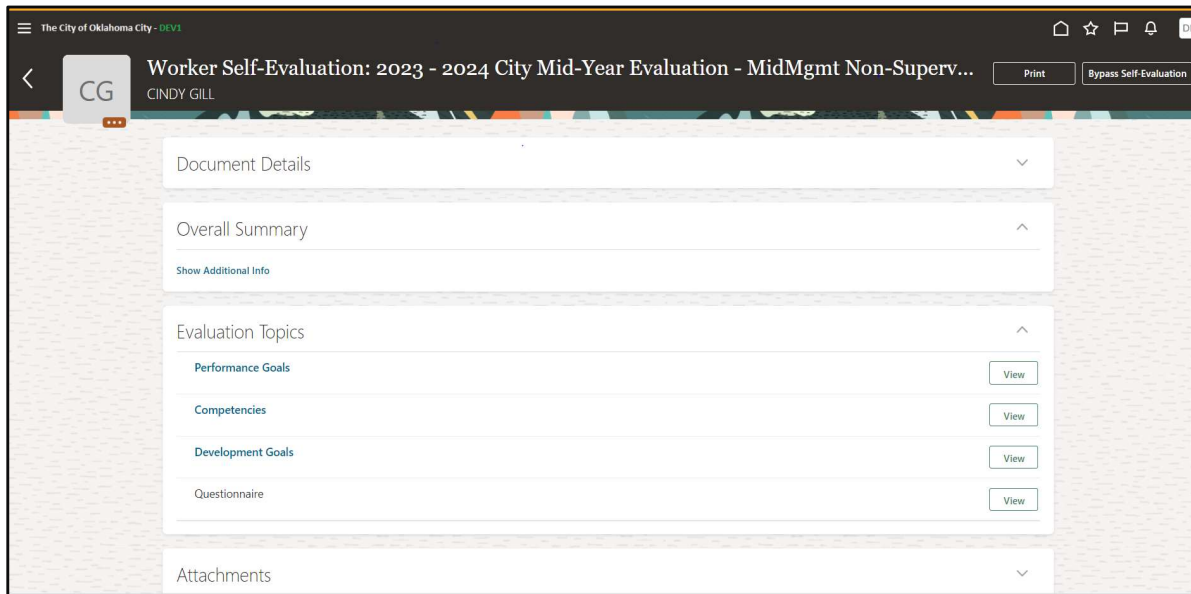


> **Current Task** will show **Worker Self-Evaluation** if the employee has not completed the self-evaluation.



> Click on **Review Period** (2023-2024 City Mid-Year Evaluation - *) for the employee to view options.

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Bypass Self-Evaluation

- > Click on the **Bypass Self-Evaluation** button if the employee has not completed the self-evaluation. This will bypass the self-evaluation and allow the manager to complete their tasks (evaluation).
- > **This step will not be necessary if the employee has completed the self-evaluation.**

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2023 - 2024 City Mid-Year Evaluation - MidMgmt Non-Supervisory
CINDY GILL

Talent Acquisition Technician

Current Task

Manager Evaluation of Workers

Task Completion

1 / 2

All Tasks

✔ Worker Self-Evaluation | Bypassed

» Manager Evaluation of Workers

Bypass Self-Evaluation

> Now the employee list page shows **Worker Self-Evaluation Bypassed** and the **Current Task** is **Manager Evaluation of Workers**.

> To begin completing the evaluation, click on the review period (2023-2024 City Mid-Year Evaluation -).

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Review and evaluate the contents of each section of the evaluation. Click submit when you're done.

Document Details

Overall Summary Edit

Manager Comments

Employee Comments

Show Additional Info

Evaluation Topics

Performance Goals	Evaluate
Manager Comments	
Employee Comments	
Competencies	Evaluate
Manager Comments	
Employee Comments	
Development Goals	Evaluate
Manager Comments	
Employee Comments	
Questionnaire	Evaluate

Attachments

Evaluation Topics

- > There are three evaluation topics: **Performance Goals, Competencies, and Development Goals.**
- > Begin the evaluation by clicking on the **Evaluate** box for **Performance Goals.**

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Evaluate the included performance goals.

Sort By: Last Updated - Latest to Oldest

Vacancy Announcements		
Status	Weight	
Not started	15 %	▼
Show Additional Info		
Leading for Results		
Status	Weight	
Not started	5 %	▼
Show Additional Info		
Customer Satisfaction		
Status	Weight	
Not started	10 %	▼
Show Additional Info		
Job Classification Support		
Status	Weight	
Not started	15 %	▼
Show Additional Info		
Hiring Event Support		
Status	Weight	
Not started	15 %	▼
Show Additional Info		
U.S. Drug and Alcohol Clearinghouse Compliance		
Status	Weight	
Not started	15 %	▼
Show Additional Info		
Special Projects		
Status	Weight	
Not started	25 %	▼
Show Additional Info		

Summary

Manager Comments

Words: 0 Characters (with HTML): 0

Employee Comments

Show Additional Info

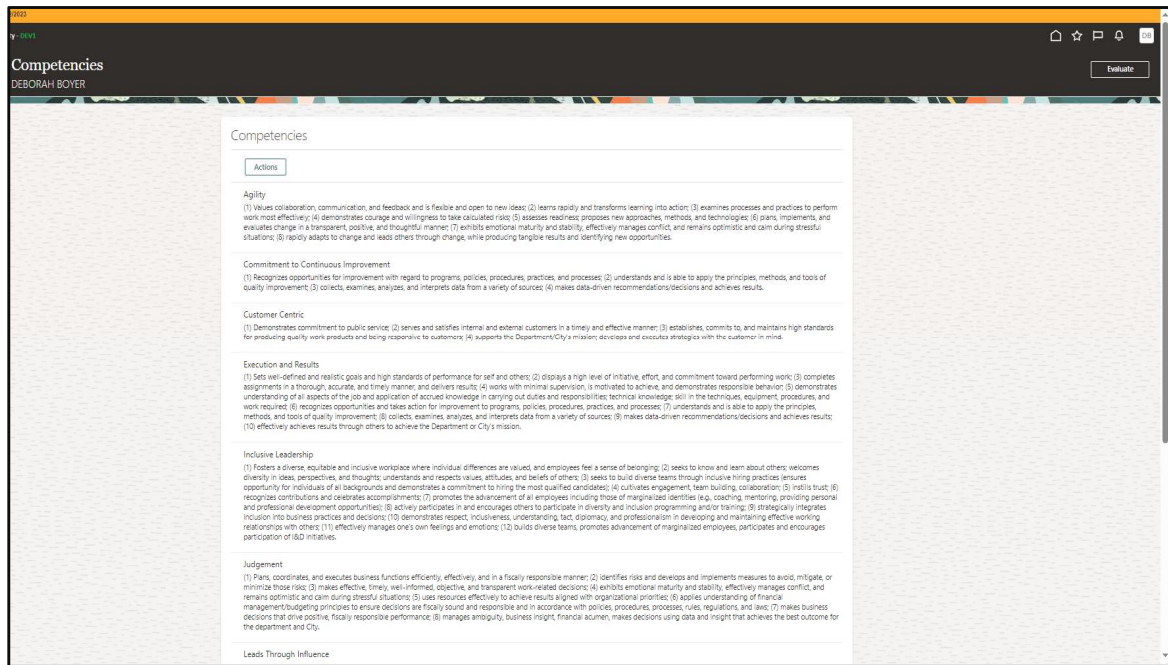
Evaluation Topics

> Click ▼ to the right of the goal **Weight** to display **Goal Details**.

> Enter comments about the employee's performance in the **Summary (Manager Comments)** box at the bottom of the screen. Click **Save and Close** to retain the comments.

> The Manager can also click on the **Goal Name** and edit goal details. Click **Save and Close** to retain the edits.

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Evaluation Topics

> Click to evaluate the next **Evaluation Topic** area (Competencies). Assigned competencies with definitions will display.

> Enter **Manager Comments** in the **Summary** section at the bottom of the page.

> Managers are encouraged to provide examples of work performed/completed that best support their evaluation.

> Click **Save** and **Close** to retain comments.

Evaluate Topic Development Goals
CINDY GILL

Save and Close Cancel

Summary

Manager Comments

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Employee Comments

Show Additional Info

Words: 0 Characters (with HTML): 0

Evaluation Topics

- > Click to evaluate the next **Evaluation Topic** (Development Goals) if the goals were entered.
- > Enter **Manager Comments** in the **Summary** section.
- > Managers are encouraged to recognize progress the employee has made toward achievement of development goals and provide feedback.

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Evaluation Topics ^

Performance Goals	Evaluate
Employee Comments	
Competencies	Evaluate
Employee Comments	
Development Goals	Evaluate
Employee Comments	
Questionnaire	Evaluate

Job Aide

Evaluation Topics

- > Below the three **Evaluation Topics**, you will find **Questionnaire**.
- > Click the **Evaluate** box to review the content of the **Employee Feedback Questionnaire**.
- > Click on **Save and Close**.
- > Manager may discuss the employee's responses to the feedback questionnaire with the employee to gain further insight and for planning/follow-up purposes.

Overall Summary

Save Cancel

Manager Comments

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Words: 0 Characters (with HTML): 0

Employee Comments

Document Details

Overall Summary Edit

Manager Comments

Employee Comments

Show Additional Info

Evaluation Topics

Performance Goals Evaluate

Manager Comments

Employee Comments

Competencies Evaluate

Manager Comments

Employee Comments

Development Goals Evaluate

Manager Comments

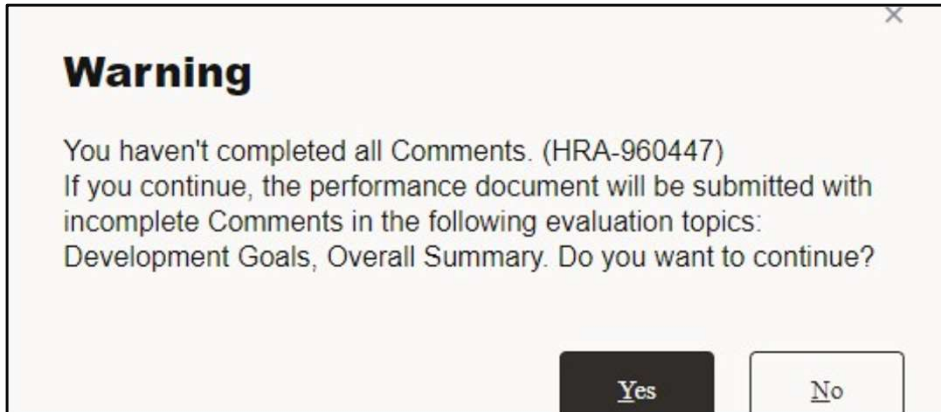
Employee Comments

Questionnaire Evaluate

Overall Summary

- > Once you've finished evaluating Performance Goals, Competencies, Development Goals and have completed the Questionnaire, click on the **Evaluate** box and complete the **Overall Summary**.
- > Click on **Submit**.

Job Aide



Warning

- > A **Warning** screen may display upon **Submit** if comments are not entered in each section. Some sections may not have been completed by an employee (e.g., Development Goals) and the Warning will still display.
- > Click **No** to go back and complete missing sections or **Yes** to move forward with submission.

Job Aide

Status Reflects Progress

- > The Performance Documents section now shows that the **Self-Evaluation** has been completed and the **Manager Evaluation of Workers** has been completed.
- > The employee and the manager will receive notifications as process steps are completed.



Job Aide

Just-in-Time Training



Oracle Performance Training Schedule Executive and Management Pay Plan Positions

Completion of Mid-Year Reviews (December 1-31, 2023)		
Open Lab: Oracle Performance – Mid-Year Reviews	October 24, 2023	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Mid-Year Reviews	October 30, 2023	9:00 a.m. to 10:00 a.m.
Open Lab: Oracle Performance – Mid-Year Reviews	November 8, 2023	10:00 a.m. to 11:00 a.m.
Open Lab: Oracle Performance – Mid-Year Reviews	November 29, 2023	3:00 p.m. to 4:00 p.m.
Employee Self-Evaluation (May 1-15, 2024)		
Open Lab: Oracle Performance – Employee Self-Evaluation	April 3, 2024	10:00 a.m. to 11:00 a.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 5, 2024	1:00 p.m. to 2:00 p.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 11, 2024	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 15, 2024	9:00 a.m. to 10:00 a.m.
Manager Evaluation (May 1-15, 2024)		
Open Lab: Oracle Performance – Manager Evaluation	April 22, 2024	11:00 a.m. to Noon
Open Lab: Oracle Performance – Manager Evaluation	April 25, 2024	1:00 p.m. to 2:00 p.m.
Open Lab: Oracle Performance – Manager Evaluation	April 29, 2024	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Manager Evaluation	May 1, 2024	10:00 a.m. to 11:00 a.m.

Access the City's training calendar to enroll: [intranet/TrainingSystems/Default.aspx](https://intranet/trainingSystems/Default.aspx)

Schedule Revised 10/20/23

- Recorded trainings available at: [InsideOKC - Oracle Training Videos - All Documents \(sharepoint.com\)](#)
- Additional resources, including a list of performance management/performance feedback courses, are available at: [Employees | City of OKC](#)

Action Items

- Ensure goals have been entered for all Executive and Management Pay Plan positions.
- Ensure “**reports to**” information is accurate in Oracle prior to December 1 (mid-year reviews) and May 1 (evaluation).
- Direct questions to HRAssist@okc.gov.
- More information can be found on okc.gov/employees.



Send questions to:
ONEOKCLOUD@OKC.GOV or
HRAssist@okc.gov

