

**Oracle Performance: Completing Employee
Self-Evaluations for Annual Review
Management/Executive Pay Plan Positions**



Training Agenda

- Implementation Timelines and Major Milestones
- Job Aide/Demonstration
 - Employee Completing Self-Evaluation
- Action Items



This training may 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; *Employee self-evaluation is encouraged but not required. Target date of completion is May 15.*

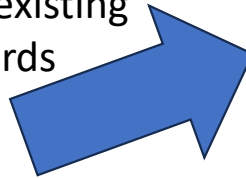
Manager writes performance evaluation, finalizes evaluation and submits for next-level approval.

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.

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.

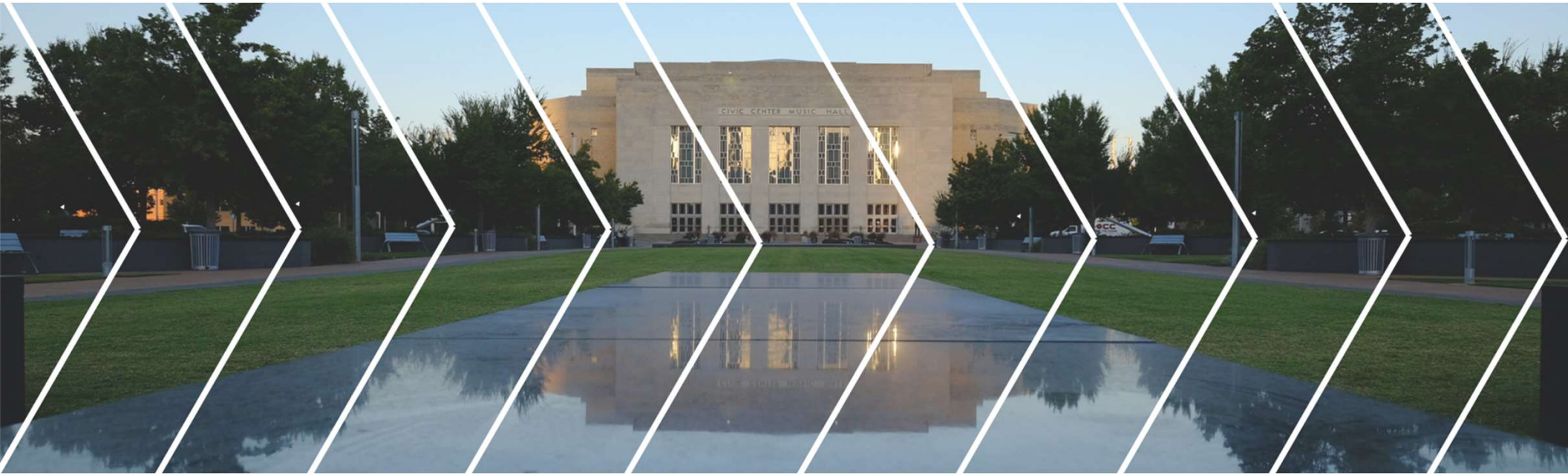
Next-level approvals are obtained.

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)
Annual 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 Annual Reviews; Submit for Approval; Performance Reviews Shared) *March 1, 2025 (Grace Period for Submission if Needed)



**Annual 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 Tasks** are **Worker Self-Evaluation** and **Manager Evaluation of Workers**.
- > Click on the **2023-2024 City Annual Evaluation - ***.
(*This may be listed as Executive, Mid-Mgmt Supervisory, or Mid-Mgmt Non-Supervisory, depending on job classification.)

Performance Documents

All

2023 - 2024 City Annual Evaluation - MidMgmt Supervisory

Current Task

- Worker Self-Evaluation
- Manager Evaluation of Workers

All Tasks

- >> Worker Self-Evaluation
- >> Manager Evaluation of Workers
- Approval
- Share Performance Document
- Worker Final Feedback
- Manager Final Feedback

Review Period

2023 July - 2024 June MGT/EXEC
2024 January - 2024 December General
2023 July - 2024 June MGT/EXEC
ZOO Fiscal Year 2024

Job Aide

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

Document Details

Performance Document Name 2023 - 2024 City Annual 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

Employee Rating	Employee Calculated Rating No valid rating level (0.00)
Employee Comments	
Show Additional Info	

Evaluation Topics

Performance Goals 0 of 10 rated 0 of 10 commented Employee Rating	Employee Calculated Rating No valid rating level (0.00)	Evaluate
Competencies 0 of 10 rated 0 of 10 commented Employee Rating	Employee Calculated Rating No valid rating level (0.00)	Evaluate
Development Goals 0 of 3 commented		Evaluate
Questionnaire		Evaluate

Attachments

Document Details

- > Click on **Document Details** to view information about the review.
- > The **Performance Document Name** will be **2023 City Annual Evaluation - *** (*This may be listed as Executive, Mid-Mgmt Supervisory, or Mid-Mgmt Non-Supervisory, depending on job classification.)
- > The **Review Dates** will be **From 07/01/2023 To 06/30/2024.**

Job Aide

Document Details Edit

Performance Document Name 2023 - 2024 City Annual 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 Rating	Employee Calculated Rating No valid rating level (0.00)
Employee Comments	
Show Additional Info	

Evaluation Topics ^

Performance Goals 0 of 10 rated 0 of 10 commented Employee Rating	Employee Calculated Rating No valid rating level (0.00)	Evaluate
Competencies 0 of 10 rated 0 of 10 commented Employee Rating	Employee Calculated Rating No valid rating level (0.00)	Evaluate
Development Goals 0 of 3 commented		Evaluate
Questionnaire		Evaluate

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

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
Completed	%10

Employee Rating
Fully Competent

Employee Comments

A¶ AI B I U ¶ ¶ @ ↶ ↷ T

Words: 0 Characters (with HTML): 0

Show Additional Info

Human Resources Systems
Administer Human Resources Systems in a way that enables City departments to meet and exceed business needs and provide excellent services to residents now and in the future

Status	Weight
Not started	%10

Employee Rating

Employee Comments

A¶ AI B I U ¶ ¶ @ ↶ ↷ T

Goal Details

> Each **Performance Goal** will display with details. (In this example, *Customer Service* is the goal name shown in example).

> Click on the ∨ in the **Employee Rating** box to display and select a self-rating for the Performance Goal:

Exceptional (5)

Superior (4)

Fully Competent (3)

Acceptable (2)

Unsatisfactory (1)

Job Aide

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 Completed Weight % 10

Employee Rating Fully Competent

Employee Comments

Words: 0 Characters (with HTML): 0

Show Additional Info

Human Resources Systems
Administer Human Resources Systems in a way that enables City departments to meet and exceed business needs and provide excellent services to residents now and in the future

Status Not started Weight % 10

Employee Rating

Employee Comments

Evaluation of Performance

- > There is an **Employee Comments** section for each goal.
- > Employees are encouraged to provide examples of work performed/completed that best support their self-rating for the goal.
- > Continue by selecting an **Employee Rating** for each goal and by entering **Employee Comments** supporting your self-rating for each goal.

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Summary

Calculate

Employee Rating

Fully Competent

Employee Calculated Rating

Fully Competent (3.00)

Show Additional Info

Category : General Information (18)

- 2021 Benefits Reduction in Force FAQ 04 26 2021
- AWPnow-Navigating-Your-EAP-Website with Instructions for HelpNet 05 03 2021
- Career Related Resources OK- Toolkit 05 03 2021
- City of OKC EAP -- Alliance Work Partners -- Instructions for Accessing HelpNet 05 03 2021
- City of OKC EAP -- Alliance Work Partners -- Overview 05 03 2021
- City of Oklahoma City Employment Process 03 09 2022 PART TIME YEAR ROUND AND SEASONAL POSITIONS
- City of Oklahoma City Employment Process 03 09 2022 FULL TIME NON UNIFORMED POSITIONS
- Continuation of Coverage (COBRA) 05 03 2021
- Continuation of Health Coverage -- COBRA
- Coping With Job Loss 05 03 2021
- How a Manager Can Update a Performance Goal Plan and Update an Existing Performance Evaluation Document (3) ✖

Job Aide

Evaluation of Performance

> Once you have completed your **Employee Ratings** and **Employee Comments** for each Performance Goal, enter an *overall rating* in the **Employee Rating** field of the **Summary** box at the bottom of the page.

> Click **Calculate** to populate the **Employee Calculated Rating**. Then click **Save and Close**.

> If you have not entered weights, the **Employee Calculated Rating** will not populate correctly.

> Instructions for editing or adding weights are available at:

[HR Assist Resources - All Documents](#)

Competencies
0 of 10 rated | 0 of 10 commented
Employee Rating

Employee Calculated Rating
No valid rating level (0.00)

Evaluate

Rate and Comment

i Evaluate the included competencies.

Sort By

Agility
(1) Values collaboration, communication, and feedback and is flexible and open to new ideas; (2) learns rapidly and transforms learning into action; (3) examines processes and practices to perform work most effectively; (4) demonstrates courage and willingness to take calculated risks; (5) assesses readiness; proposes new approaches, methods, and technologies; (6) plans, implements, and evaluates change in a transparent, positive, and thoughtful manner; (7) exhibits emotional maturity and stability, effectively manages conflict, and remains optimistic and calm during stressful situations; (8) rapidly adapts to change and leads others through change, while producing tangible results and identifying new opportunities.

Employee Rating

Employee Comments

A *AI* **B** *I* U *:=* *:=* @ ↶ ↷ *I*

Words: 0 Characters (with HTML): 0

Job Aide

Evaluation of Competencies

> Click < next to your photo/name in the upper left-hand corner of your screen to return to the prior screen. Click to **Evaluate** the next **Evaluation Topic** area (**Competencies**). All assigned competencies with definitions will display.

> Click the **Evaluate** button in the upper right corner to review each competency and select an **Employee Rating**.

> Enter **Employee Comments** supporting your self-rating for each competency.

Evaluation of Competencies

> Once you have completed your **Employee Ratings** and **Employee Comments** for each Competency, enter an *overall rating* in the **Employee Rating** field of the **Summary** box at the bottom of the screen.

> Click **Calculate** to populate the **Employee Calculated Rating**. Then click **Save and Close**.

Summary Calculate

Employee Rating	Employee Calculated Rating
Fully Competent	Fully Competent (3.00)

Show Additional Info

Job Aide

Development Goals

+ Add

Actions

Sort By Latest to Oldest

Creating and Managing Internship Programs

This course will provide foundational information to achieve a performance goal of creating and internship program for the City.

Status
In progress

Conducting Talent Reviews

Identify available training and complete training in conducting talent reviews.

Status
In progress

Leadership

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

Status
In progress

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Evaluation of Development Goals

- > Click < next to your photo/name in the upper left-hand corner of your screen to return to the prior screen. Click to evaluate the next **Evaluation Topic** area (**Development Goals**). Your Development Goals will display.
- > Click the **Evaluate** button in the upper right corner.
- > **Development Goals** are not rated.
- > Review each **Development Goal** and enter **Employee Comments**.
- > Click **Save and Close**.

1. What talents, interests, or skills do you possess that we haven't made the most of?

Rich text editor toolbar with icons for bold, italic, underline, list, link, and other formatting options.

TEST

Words: 1 Characters (with HTML): 11

2. What are your career goals?

Rich text editor toolbar with icons for bold, italic, underline, list, link, and other formatting options.

TEST

Words: 1 Characters (with HTML): 11

3. What career development opportunities would you like to have during the upcoming evaluation period in support of those goals?

Rich text editor toolbar with icons for bold, italic, underline, list, link, and other formatting options.

TEST

Words: 1 Characters (with HTML): 11

4. What kind of recognition is most meaningful to you?

Rich text editor toolbar with icons for bold, italic, underline, list, link, and other formatting options.

TEST

Words: 1 Characters (with HTML): 11

Feedback Questionnaire

> Click < next to your photo/name in the upper left-hand corner of your screen to return to the prior screen. Below the three evaluation topics, you will see

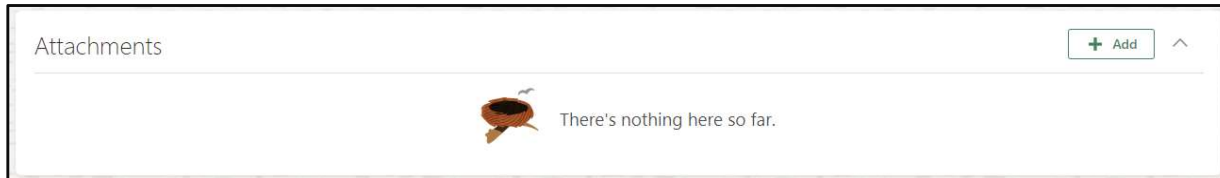
Questionnaire.

> Click on the **Evaluate** box to complete the **Employee Feedback Questionnaire.**


> Click **Save and Close** button to save your responses.


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Attachments



Attachments + Add ^

 There's nothing here so far.

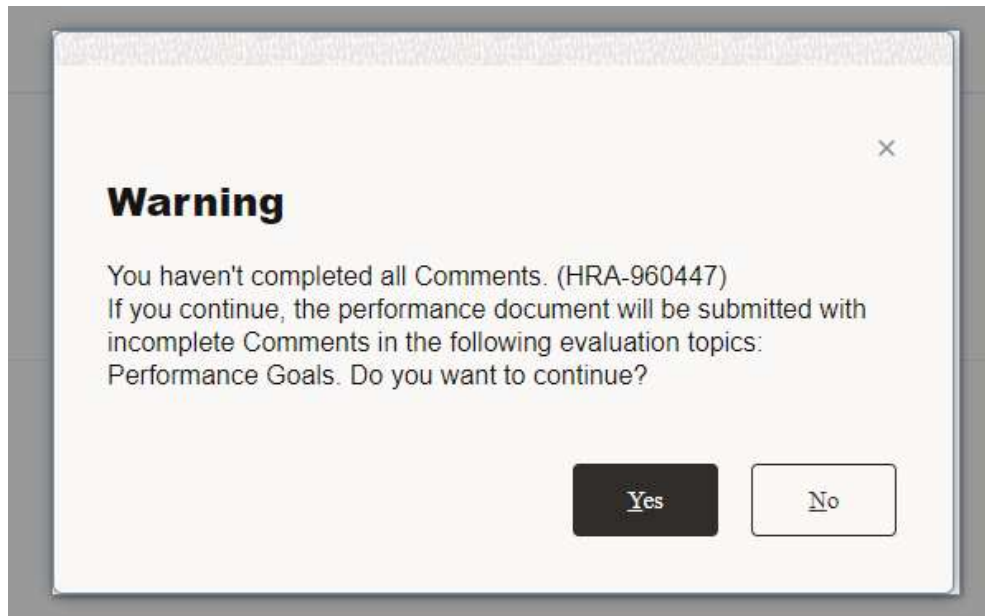


Attachments Save Cancel

 Drag files here or click to add attachment. ▼

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- > Once you've evaluated Performance Goals, Competencies, Development Goals and completed the Questionnaire, you can choose to add Attachments as supporting documentation.
- > Click **+Add** and drag files into the **Attachments** box or click to add the attachments.
- > Click on **Save**.
- > The final step is to click on **Submit**.
- > The self-evaluation and questionnaire responses will be viewable by your manager.



Warning

- > A **Warning** screen may display upon **Submit** if comments are not entered in each section.
- > Click **No** to go back and complete missing sections or **Yes** to move forward with submission.

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Performance Documents

All

2023 - 2024 City Annual Evaluation - MidMgmt Supervisory AIMEE MADDERA

Current Task
 Manager Evaluation of Workers

Task Completion
 1 / 6

All Tasks

- Worker Self-Evaluation
- Manager Evaluation of Workers
- Approval
- Share Performance Document
- Worker Final Feedback
- Manager Final Feedback

Worker Self-Evaluation: 2023 - 2024 City Annual Evaluation - MidMgmt Supervisory Print

DEBORAH BOYER

Document Details

Overall Summary

Employee Rating Fully Competent	Employee Calculated Rating Fully Competent (3.00)
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Employee Comments
Comments

Show Additional Info

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Status Reflects Progress

> The Performance Documents section now shows the **Worker Self-Evaluation** has been completed.

> To print a copy of the self-evaluation, click on the Annual Evaluation document:

2023 – 2024 City Annual Evaluation – Mid Mgmt Supervisory (*This may be listed as Executive, Mid-Mgmt Supervisory or Mid-Mgmt Non-Supervisory, depending on job classification.)

> Click **Print** in the upper right-hand corner.

Document Details ∨

What do you want to print?

Format	Evaluation Topics
<input checked="" type="radio"/> PDF	<input checked="" type="checkbox"/> Performance Goals
<input type="radio"/> HTML	<input checked="" type="checkbox"/> Competencies
Feedback Contributors	<input checked="" type="checkbox"/> Development Goals
<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Questionnaire
<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Overall Summary
	<input checked="" type="checkbox"/> Worker Final Feedback
	<input checked="" type="checkbox"/> Manager Final Feedback

[Print](#)

Status Reflects Progress

- > Choose what you want to print.
- > Click on Print.

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BOYER, DEBORAH

2023 - 2024 City Annual Evaluation - MidMgmt Supervisory

07/01/2023 to 06/30/2024

Document Status In progress

Evaluated By MADDERA, AIMEE

Employment Details

Position	Talent Acquisition & Development Manager	Job	Talent Acquisition & Development Manager
Location	James D. Couch Municipal Building	Department	HUMAN RESOURCES - Talent Acquisition and Development Manager

Overall Summary

	Worker
Overall Rating	Fully Competent
Comments	Comments

Performance Goals

	Worker
Section Rating	Fully Competent

Customer Service

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

Success Criteria

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

Example of Employee Self-Evaluation

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Example of Employee Self-Evaluation

Talent Acquisition

Description Attract, hire and retain a qualified and diverse workforce to meet the business needs of City departments so they can provide excellent service to residents

Success Criteria

- (1) Implementation of pre-employment online testing
- (2) Implementation of Centers of Excellence for the Talent Acquisition Program
- (3) Time to Fill reduced to Requisition to Referral Li

(4) Development and imp plan to maintain engagem hiring process

Start Date 07/01/2023
Status Not started

Target Completion Date 06/30/2024

Level
Related Link
Comments

Weight 10 %

Competencies

	Worker
Section Rating	Fully Competent

Agility

	Worker
Performance Rating	Fully Competent
Comments	TEST

Commitment to Continuous Improvement

	Worker
Performance Rating	Fully Competent
Comments	TEST

Customer Centric

	Worker
Performance Rating	Fully Competent

	Worker
Performance Rating	Fully Competent
Comments	Test

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Example of Employee Self-Evaluation

> The next step is Manager Evaluation of Workers.

Questionnaire

BOYER, DEBORAH

1. What talents, interests, or skills do you possess that we haven't made the most of?

TEST

2. What are your career goals?

TEST

3. What career development opportunities would you like to have during the upcoming evaluation period in support of those goals?

TEST

4. What kind of recognition is most meaningful to you?

TEST

Worker Final Feedback

Performance Documents

All

2023 - 2024 City Annual Evaluation - MidMgmt Supervisory

AIMEE MADERA

Current Task

Manager Evaluation of Workers

Task Completion

1 / 6

All Tasks

- Worker Self-Evaluation
- Manager Evaluation of Workers
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- Manager Final Feedback

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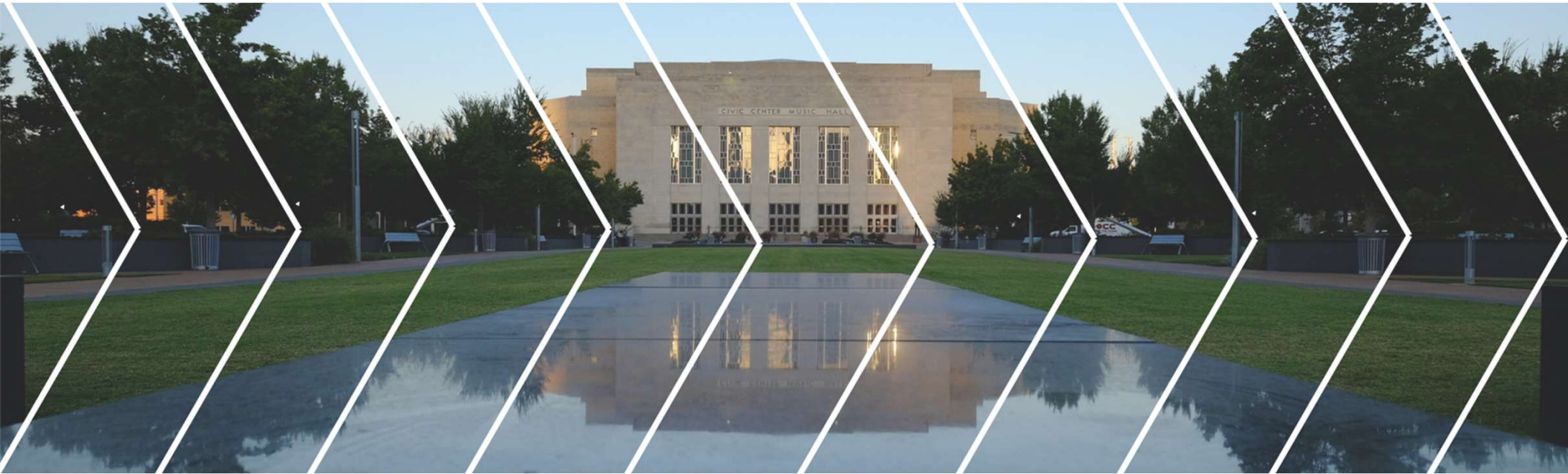
Just-in-Time Training

- Upcoming Training Sessions for Manager Evaluation of Workers:
 - > April 22, 2024, 11:00 to Noon
 - > April 25, 2024, 2:00 to 3:00 p.m.
- Additional resources, including a list of performance management/performance feedback courses, are available at: [Employees | City of OKC](#)



Resources

- [Oracle Day 1 Checklist](#) (PDF)
- [What will my pay check look like](#) (PDF)
- [Training Schedule](#) (PDF)
- [How to Create, Share and Approve Goals in Oracle Performance Presentation](#) (PDF)
- [New Performance Competencies](#) (PDF)
- [Oracle Learning and Performance Presentation](#) (PDF)
- [Oracle Performance - Check-ins & Feedback Presentation](#) (PDF)
- [Oracle Performance - Mid-Year Evaluations Presentation](#) (PDF)
- [Step Placement Policy](#)
- [Information for General Pay Plan Employees](#)
- [General Pay Plan Performance Document Example](#)
- [Goals Creation Sharing and Approval](#)
- [Performance Management/Performance Feedback Courses](#)



**Demonstration:
Employee Self-Evaluation
Annual Review**

Action Items

- Ensure “**reports to**” information is updated and accurate prior to each performance milestone date.
 - > Department HR Contacts have access to submit changes to HRIS via an Oracle process (link provided in the chat)
- Complete employee self-evaluations for annual review by May 15, 2024. *Employee self-evaluation is encouraged but not required.*
- 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

