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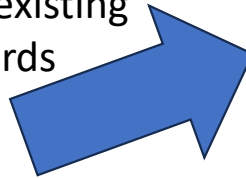
Manager writes performance evaluation, finalizes evaluation and submits for next-level approval.

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)
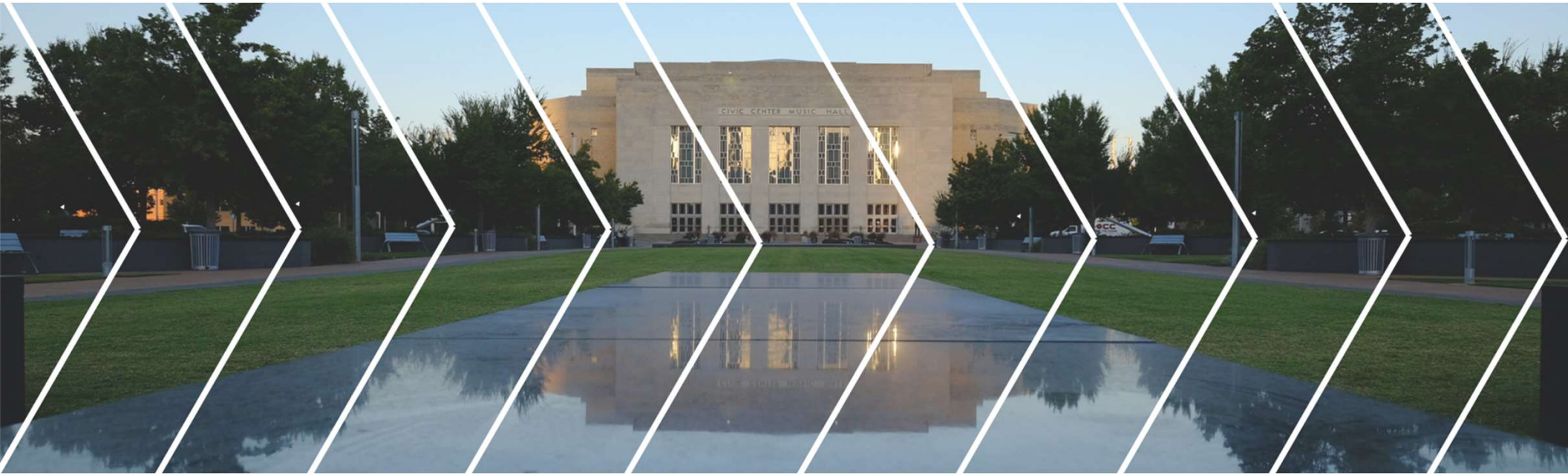
Annual Review:
Employee Completion of Self-Evaluation

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

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

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

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

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.

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

Job Aide

Evaluation of Competencies

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

Employee Calculated Rating
No valid rating level (0.00)

Evaluate

Rate and Comment

ⓘ Evaluate the included competencies.

Sort By Competency Name-A to Z ⌄

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

Aᶠ ⌄ AI ⌄ **B** *I* U̲ ☰ ☷ 𝒪 ↶ ↷ Tₓ

Words: 0 Characters (with HTML): 0

Job Aide

> 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
Fully Competent ⌄

Employee Calculated Rating
Fully Competent (3.00)

Show Additional Info

Job Aide

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 <u>not</u> rated.

>Review each **Development Goal** and enter **Employee Comments.**

> Click **Save and Close.**

Job Aide

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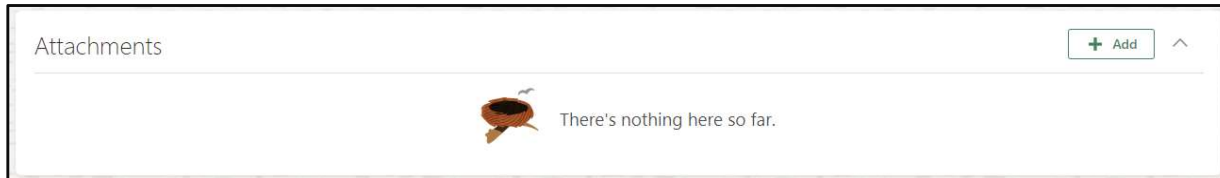
> Click on the **Evaluate** box to complete the **Employee Feedback Questionnaire**.

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

Job Aide

Attachments

> 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.

Job Aide

Warning

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: Performance Goals. Do you want to continue?

Yes   No
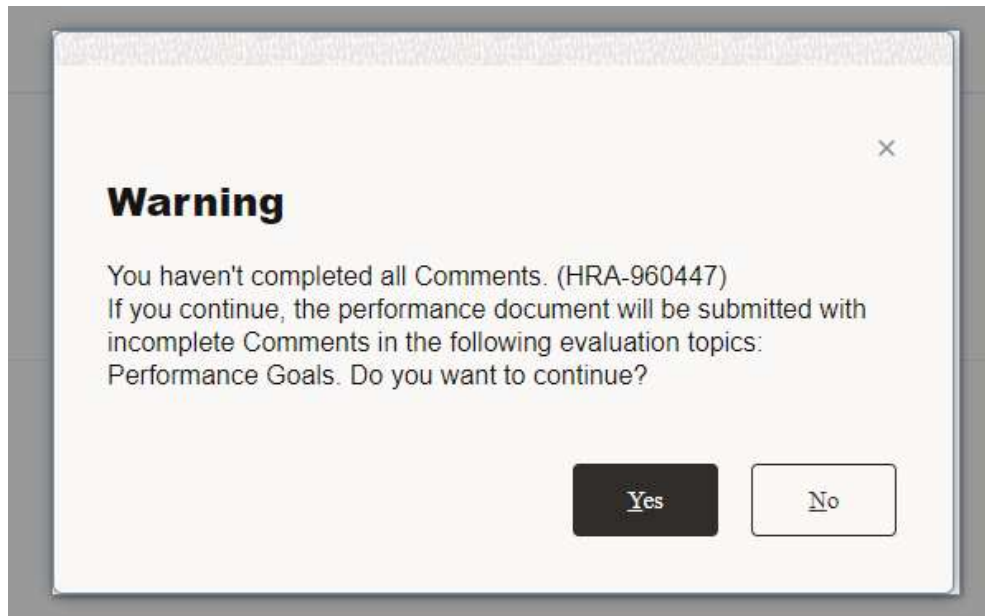
> A **Warning** screen may display upon **Submit** if comments are not entered in each section.

> Click **No** to go back and complete missing sections or **Yes** to move forward with submission.

Job Aide

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.

Job Aide

Status Reflects Progress

> Choose what you want to print.

> Click on Print.

Example of Employee Self-Evaluation

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	MADDERA, AIMEE

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)

Job Aide

Example of Employee Self-Evaluation

Job Aide

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 MADDERA

Current Task   **Task Completion**
Manager Evaluation of Workers   1 / 6

All Tasks
- ✓ Worker Self-Evaluation
- » Manager Evaluation of Workers
- ○ Approval
- ○ Share Performance Document
- ○ Worker Final Feedback
- ○ Manager Final Feedback

---

Job Aide

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
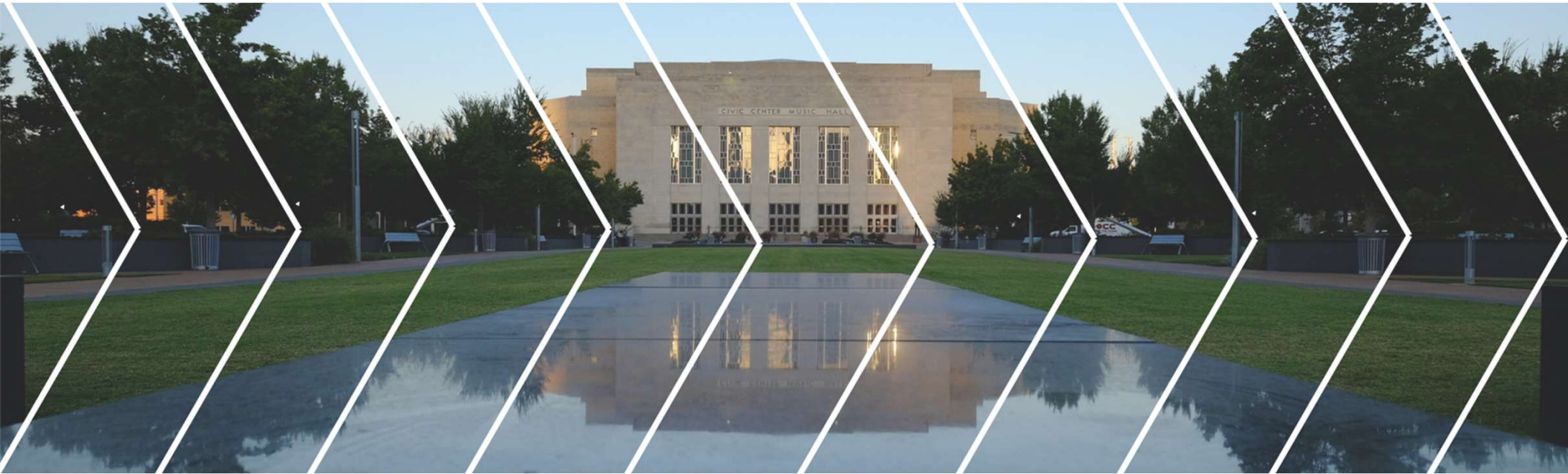
Demonstration:
Employee Self-Evaluation
Annual Review

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:
ONEOKCCLOUD@OKC.GOV or
HRAssist@okc.gov