



# Performance Appraisal Instructions, Tips and Resources For Employees

**FY20 Annual Appraisals must be completed by May 22, 2020**

| Action   | Instructions  | Notes   |
|--|---|---|
| Logging In                                       | <ul style="list-style-type: none"> <li>Access HRMS via Employee Portal: <a href="http://employees.henrico.us">employees.henrico.us</a></li> <li>Log in using the same User Name and Password that you use for time entry and submitting leave requests</li> </ul>   | <ul style="list-style-type: none"> <li>Call HR at 501-4357 (IT Help Desk) to have your password reset or if you have difficulty logging in</li> </ul>   |
| Accessing the Appraisal                          | <p>The first time you access the appraisal:</p> <ul style="list-style-type: none"> <li>Click once on the <b>"Employee Direct Access"</b> responsibility</li> <li>Click once on <b>"My Appraisals"</b></li> <li>Click once on the <b>yellow pencil icon</b>; "Update"</li> </ul> <p>Notes:</p> <ul style="list-style-type: none"> <li><b>Access the current appraisal each time via Employee Direct Access, My Appraisals and the yellow pencil icon</b></li> <li>Previous appraisals are also available via My Appraisals – they are located at the bottom of the page</li> </ul>   | <p><b>Do NOT use the Worklist notification for reviewing or completing your appraisal</b></p> <ul style="list-style-type: none"> <li><b>Ok button only closes the notification</b></li> <li>Use the Worklist notification ONLY if you need to request additional information from your supervisor (or other approver) before completing the online appraisal – the request additional information button is only available via the Worklist notification</li> </ul>   |
| Reviewing the Appraisal                          | <p><b>Review the information in each section of the appraisal:</b></p> <ul style="list-style-type: none"> <li>Review the information in <b>Appraisal Review</b> and <b>Setup Details</b> to ensure the information is correct</li> <li><b>Competencies:</b> Confirm the correct competencies (employee or supervisor) were used to evaluate performance to current behavioral anchors</li> <li>Review the <b>"Overall Rating, Comments and Upcoming Goals"</b> section for rating and comments</li> <li>Note any attachments in the table located in the Overall Ratings, Comments and Upcoming Goals section</li> </ul>  | <ul style="list-style-type: none"> <li>Review the appraisal and take time to consider the rating, comments and goals</li> <li>You can prepare your own feedback on your performance and/or the appraisal and include your feedback as a permanent part of the online appraisal</li> </ul> <p><b>NOTE:</b> Completing the appraisal does <u>not</u> indicate your agreement with the appraisal – only that you reviewed it</p>   |
| Reviewing an Attachment                          | <ul style="list-style-type: none"> <li>A <b>hyperlink</b> to open each attachment will be located in the attachment table</li> <li>Click once on the attachment <b>hyperlink</b> and a new window will open with a dialogue box</li> <li>The dialogue box will open and you can chose to open or save the document</li> <li>Click <b>"Open"</b> button to immediately access the attachment</li> </ul>  | <ul style="list-style-type: none"> <li>Attached documents will remain a permanent part of the online appraisal</li> <li><b>A copy of the document can be saved</b> by clicking on the document <b>hyperlink</b> and then clicking on the <b>Save</b> button and then choosing where to save your document (for example: desktop)</li> </ul>   |
| Completing the Appraisal without adding comments | <ul style="list-style-type: none"> <li>Click once on the <b>"Provide Overall Feedback"</b> button</li> <li>Click once on the <b>"Submit"</b> button and the online appraisal will be completed and archived</li> </ul> <p>NOTE: The employee and supervisor must still meet face-to-face to discuss the appraisal and any goals</p>   | <ul style="list-style-type: none"> <li>The system will send a notification to the supervisor advising him/her to schedule a meeting with you to discuss the appraisal including performance standards and any upcoming goals face-to-face</li> </ul>  |
| Completing the Appraisal with comments           | <ul style="list-style-type: none"> <li>Click once on the <b>"Provide Overall Feedback"</b> button</li> <li>Two open text boxes will become available</li> <li>Add your comments to the <b>"Feedback and Overall Rating"</b> open text box</li> <li>Include a comment if you are adding an attachment</li> <li>If you need to add a message to the Main Appraiser (supervisor), enter the message in the "Notification Message for Main Appraiser" open text box</li> <li>Then click once on <b>"Submit"</b> button</li> </ul> <p>NOTE: You may add attachments to the appraisal. Prepare your attachments, give copies to your supervisor and discuss them. Send copies to HR Attention Terri Higgins and the attachments will become a permanent part of your official personnel file.</p> | <ul style="list-style-type: none"> <li>2000 character limit – includes all spaces</li> <li>Once the appraisal is complete it will be archived in the system and remain available via "My Appraisals"</li> <li>The system will send any notification message entered to the supervisor</li> <li>The system will send a notification to the supervisor advising him/her to schedule a meeting with the employee to discuss the appraisal including performance standards and any upcoming goals face-to-face</li> </ul> |
| Requesting Additional Information                | <ul style="list-style-type: none"> <li>From the <b>Worklist</b> click once on the <b>hyperlink</b> notification</li> <li>Click once on the <b>"Request Information"</b> button and enter a brief appropriate message for the Main Appraiser (supervisor)</li> <li>Click once on the <b>"Submit"</b> button</li> <li>The Main Appraiser (supervisor) will get a notification in his/her Manager Direct Access Worklist</li> </ul>  | <ul style="list-style-type: none"> <li>This is a preliminary online exchange that occurs before the face-to-face meeting and before the completing the online appraisal</li> <li>While the exchange is taking place, the appraisal remains with the employee and available through "My Worklist" using the "All Notifications" option</li> <li>All notifications are in "My Worklist"</li> </ul>  |



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| TIPS  |   |  |
|---|---|--|
| <b>Tips</b>   | <ul style="list-style-type: none"> <li>2000 Character limit in open text boxes (<i>includes spaces</i>)</li> <li>Completion of the online appraisal does not indicate agreement with the appraisal – simply that it was shared with the employee</li> </ul>   | <ul style="list-style-type: none"> <li>Appraisal process is the same for all types of appraisals</li> <li>You are encouraged to add your comments to the appraisal in the feedback section. Your documents can be forwarded to HR to be attached to the permanent appraisal record in the official personnel file in HR.</li> </ul>                  |
|   | <ul style="list-style-type: none"> <li>Face-to-face meeting to discuss the appraisal and any goals is still required</li> </ul>   | <ul style="list-style-type: none"> <li>The electronic version is the official appraisal – <u>not</u> the printed page</li> </ul>   |
| <b>Types of Appraisals</b>                              | <b>Annual Appraisal:</b> The normal evaluation, given annually, which covers approximately 26 pay periods   | <b>Probationary Appraisal:</b> The evaluation following the initial 12-month period for a new hire in any position   |
|   | <b>Annual/Probationary Appraisal:</b> Single form used <u>only</u> for employees hired between 4-30-2019 and 6-21-2019 to complete both the probationary evaluation and the annual appraisal on just one form   | <b>Extended Appraisal:</b> A follow-up evaluation given after an evaluation period has been extended   |
|   |   | <b>Interim Appraisal:</b> An evaluation given at any point during an evaluation period (recommended but not required) to provide formal feedback on an employee's performance  |
| <b>Employee currently does NOT have computer access</b> | <ul style="list-style-type: none"> <li>After all the necessary approvals have been received, the Main Appraiser will print the appraisal using the "Printable Page" option accessed through the "Performance Appraisal Process," meet with the employee to discuss the appraisal, obtain the employee's comments and signature and then forward the signed appraisal to HR</li> </ul>   | <ul style="list-style-type: none"> <li>HR will close the online appraisal process and scan the printed appraisal into the employee's official personnel file located in HR</li> <li>The Main Appraiser should provide the employee with a copy of the signed appraisal if the employee requests a copy. A copy is also available from HR.</li> </ul> |
| RESOURCES   |   |  |
| <b>Completed Appraisals</b>                             | <ul style="list-style-type: none"> <li>Completed appraisals are always available to you</li> <li>Access Oracle HRMS via the employee portal</li> <li>Log in using the same User Name and Password that you use for time entry and submitting leave requests</li> <li>Click once on "My Appraisals"</li> <li>Scroll to the bottom of the page to the "Completed Appraisals" section</li> <li>Click once on the square blue "Details" icon to open a completed appraisal</li> </ul> | NOTE: Attachments are available in the completed appraisals. Click once on the hyperlink to open an attachment.  |
| <b>Additional Assistance</b>                            | Special Assistance with Appraisals: <ul style="list-style-type: none"> <li>Becky Simulcik: 501-4783</li> </ul>  | Technical Assistance: <ul style="list-style-type: none"> <li>Terri Higgins: 501-5241 or Tammy Parsley: 501-7544</li> <li>Kim Downer: 501-7513</li> </ul>   |
| <b>Online Resources:</b>                                | <a href="http://employees.henrico.us/info/appraisals/">http://employees.henrico.us/info/appraisals/</a><br>(use the site map): <ul style="list-style-type: none"> <li>Behavioral Anchors for Each Competency</li> <li>List of Competencies</li> </ul>   | <ul style="list-style-type: none"> <li>Training Presentation (PowerPoint)</li> <li>Workflow diagrams</li> </ul>  |

**Start with Employee Direct Access**

**Use My Appraisals to access current AND previous appraisals**

The screenshot shows a navigation menu on the left with 'Employee Direct Access' and 'My Appraisals' circled in red. A red arrow points from the text 'Start with Employee Direct Access' to the 'Employee Direct Access' link. Another red arrow points from the text 'Use My Appraisals to access current AND previous appraisals' to the 'My Appraisals' link. On the right, a 'Worklist' notification is shown with a red 'no' symbol (a circle with a diagonal line) over it. The notification includes a subject line 'Your appraisal has been completed. Please review and provide feedback.', a date '27-Jan-2013', and a name 'Tate, Becky'. Below the notification are two tips: 'TIP Vacation Rules - Redirect or auto-respond to notifications.' and 'TIP Worklist Access - Specify which users can view and act upon your notifications.'