

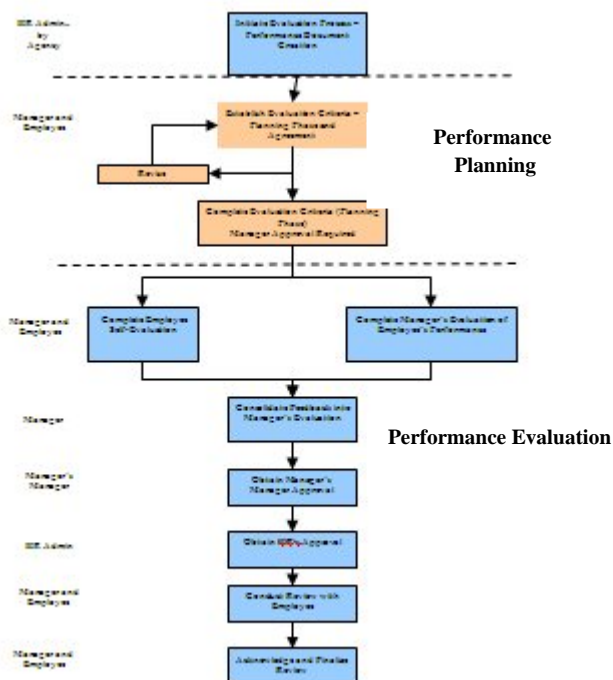
## Planning Phase

**Planning** Performance Notes Evaluation Reports

Once the HR Administrators have created the agency performance documents, the next step is the planning phase for the managers and the employees. During this phase, managers and employees determine the employee goals and objectives for the upcoming performance period. The best way for this process to take place is for the manager and employee to meet with each other as necessary to establish goals and objectives that both are comfortable with.

Once the performance criteria have been established and input into the system the manager and the employee have the ability to view these documents throughout the year. In subsequent modules we will discuss how to record performance notes to help both the manager and employee to keep track of their performance.

### Planning Phase Manager Annual



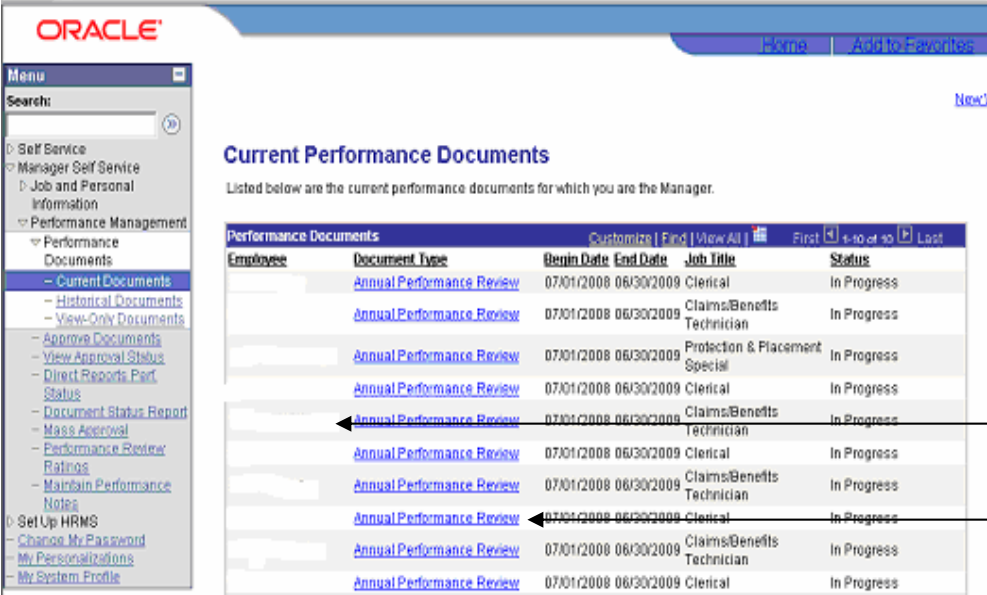
The manager will input the discussed performance criteria.

The manager will begin this phase of the process by doing these steps:

1. Manager logs into the system.
2. Selects "Manager Self Service" on the menu bar
3. Selects "Current Documents"
4. Manager enters performance criteria (goals and objectives) into "Establish Evaluation Criteria"
5. Manager completes planning phase

These steps are repeated for mid-year and quarterly performance documents.

Step 1



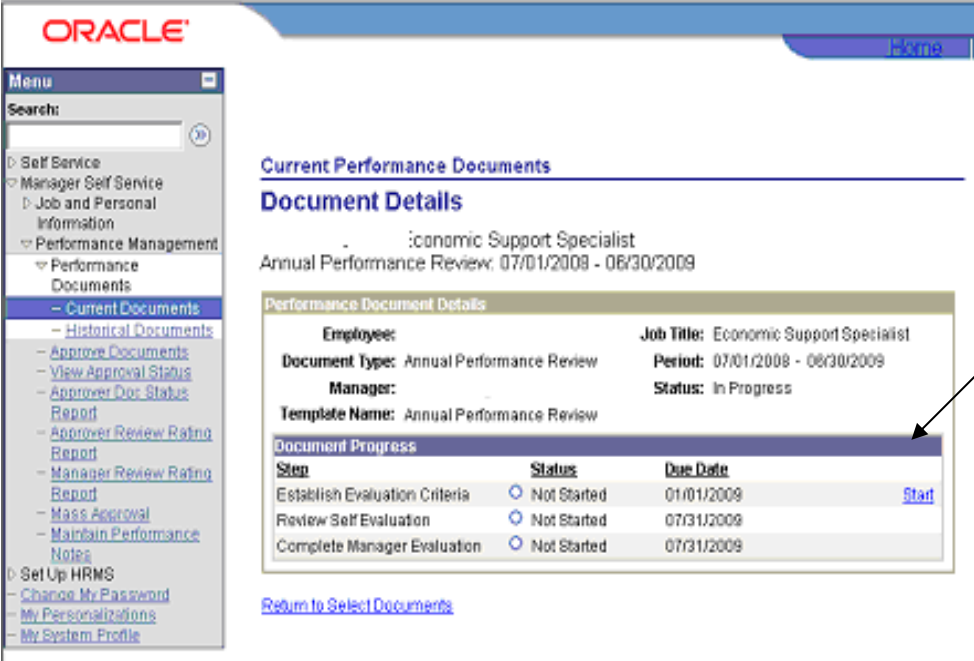
Step 1: Go to screen Current Documents.

- a) To access screen: Manager Self Service → Performance Management → My Performance Documents → Current Documents
- b) Click “Annual Performance Review” link corresponding to the appropriate employee.

Note: Each Manager will only see direct reports.

[Annual Performance Review](#)

Step 2



Step 2:

- a) Select Start – “Establish Evaluation Criteria”.

[Start](#)

Step 3



**ORACLE**

Performance Document - Annual Performance Review  
**Performance Criteria - Draft**

Annual Performance Review: 07/01/2008 - 06/30/2009

Save Complete Cancel [Return to Document Detail](#)

[View Printable Evaluation](#) [Notify](#)

**Section 1 - Statewide Core Competencies**

Statewide Core Competencies will be evaluated by:  
Employee, Manager Self Service

**Customer Service Orientation**

Details  
Description: Understands that all State employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable customer service.  
Critical: Yes

**Teamwork and Cooperation**

Details  
Description: Cooperates with others to accomplish common goals; works with...

Step 3: Review Statewide Core Competencies.

These competencies will be pre-populated for all employees. You cannot add or delete in this section.

There are five Statewide Core Competencies.

- Customer Service Orientation
- Teamwork and Cooperation
- Results Orientation
- Accountability
- Judgment and Decision Making

There are two additional Statewide Core Competencies that in most cases, are pre-populated for those individuals in a managerial job.

- Transformers of Government
- Talent Management

Step 4



**ORACLE**

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

[+ Add Individual Goals/Competencies](#)

Section Summary Section Weight:  %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

**Assists client/consumer in resolving benefit problems or in**

Details  
Description: Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

[+ Add Job Responsibilities](#) [- Delete](#)

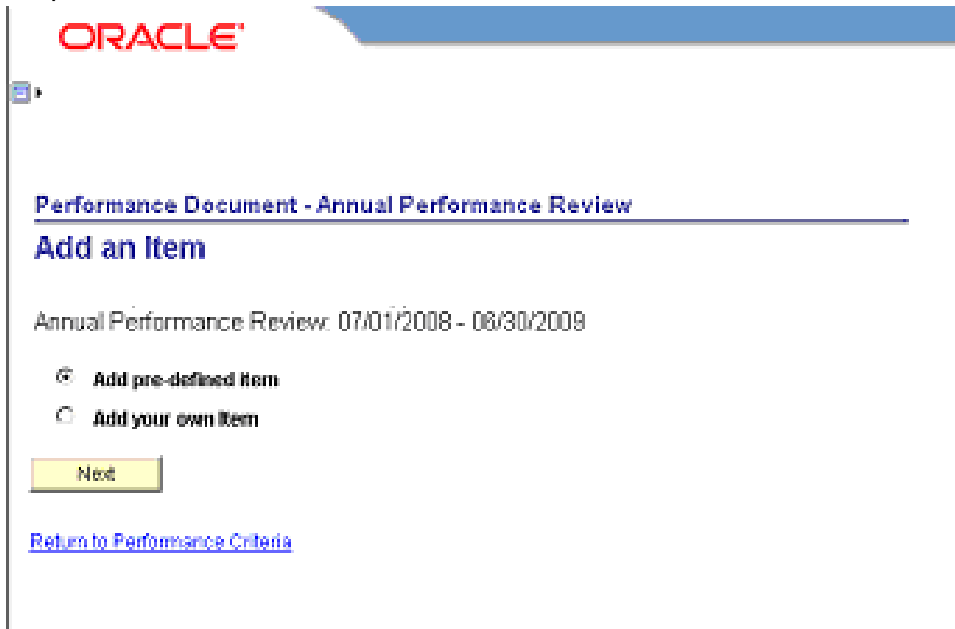
**Contacts claimant, relatives, representatives and/or other a**

Details

Step 4: The manager can add an individual goal or competency.

- a) Click on "Add Individual Goal/Competencies."

Step 5

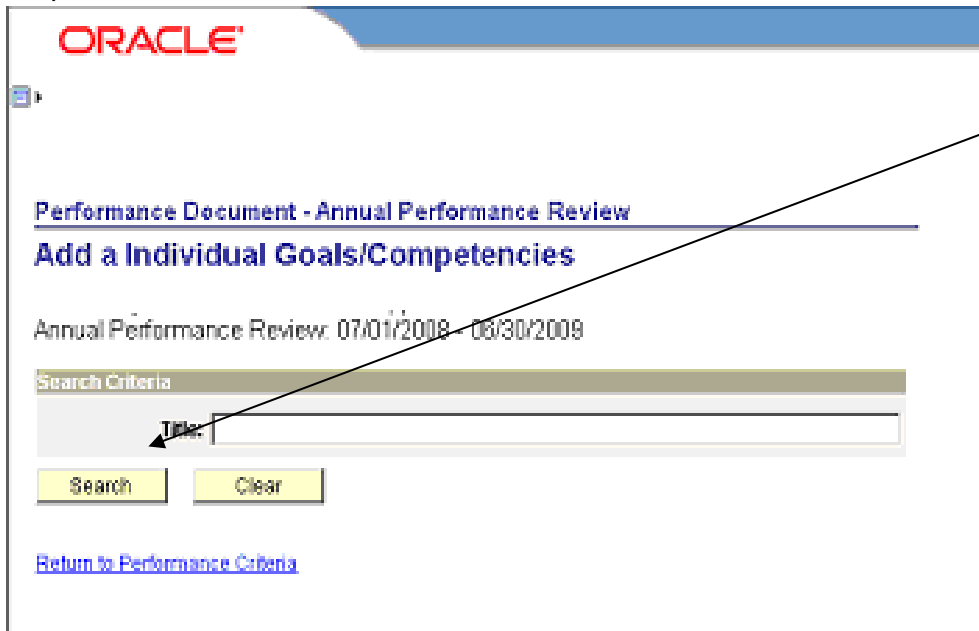


The screenshot shows the Oracle HR system interface for Step 5. At the top left is the Oracle logo. Below it is a navigation menu with a home icon and a right-pointing arrow. The main heading is "Performance Document - Annual Performance Review" followed by "Add an Item". Below this, it says "Annual Performance Review: 07/01/2008 - 08/30/2009". There are two radio button options: "Add pre-defined item" (which is selected) and "Add your own item". Below the options is a yellow "Next" button. At the bottom left is a blue link "Return to Performance Criteria".

Step 5: The manager can now add a pre-defined goal to the performance evaluation.

- a) Click "Add a pre-defined item"  
**Add pre-defined item.**
- b) Click "Next."

Step 6



The screenshot shows the Oracle HR system interface for Step 6. At the top left is the Oracle logo. Below it is a navigation menu with a home icon and a right-pointing arrow. The main heading is "Performance Document - Annual Performance Review" followed by "Add a Individual Goals/Competencies". Below this, it says "Annual Performance Review: 07/01/2008 - 08/30/2009". There is a section titled "Search Criteria" with a text input field labeled "Title:". Below the input field are two buttons: "Search" and "Clear". At the bottom left is a blue link "Return to Performance Criteria".

Step 6: The manager can add a goal or competency.

- a) Click "Search."

Step 7



The screenshot shows the Oracle HR system interface for adding individual goals/competencies. At the top, it says 'ORACLE' and 'Add a Individual Goals/Competencies'. Below that, it indicates the 'Annual Performance Review: 07/01/2008 - 06/30/2009'. There is a search criteria section with a 'Title:' input field and 'Search' and 'Clear' buttons. The search results section is titled 'Search Results' and shows a list of 11 items, each with a checkbox. The items are: Communication, Flexibility, Professional Development, Negotiation and Influence, Conflict Management, Cultural Awareness, Team Leadership, Teaching Others, Initiative, Project Management, and Creativity and Innovation. The 'Cultural Awareness' item is selected. At the bottom, there are 'Select All' and 'Clear All' buttons.

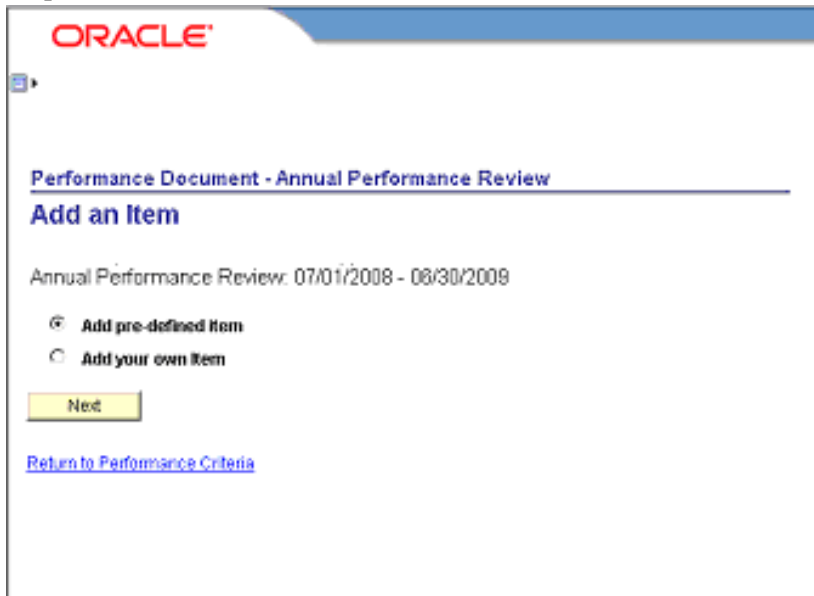
Step 7: The search results will display the list of Individual Goals/Competencies.

The manager can select desired goals.

- a) Click the checkbox beside each goal to be added to the performance evaluation.

Note: Each goal or competency will be rated individually during the performance evaluation period.

Step 8




The screenshot shows the Oracle HR system interface for adding an item to the performance document. At the top, it says 'ORACLE' and 'Performance Document - Annual Performance Review'. Below that, it indicates the 'Annual Performance Review: 07/01/2008 - 06/30/2009'. There are two radio button options: 'Add pre-defined item' (which is selected) and 'Add your own item'. Below the options is a 'Next' button. At the bottom, there is a link that says 'Return to Performance Criteria'.

Step 8: The manager has now added a pre-defined goal to the performance evaluation.

- a) Click "Next."

Step 9



ORACLE

(not less than 25%)

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

**Communication**

Details  
**Description:** Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

+ Add Individual Goals/Competencies - Delete

Section Summary **Section Weight:** 50 %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

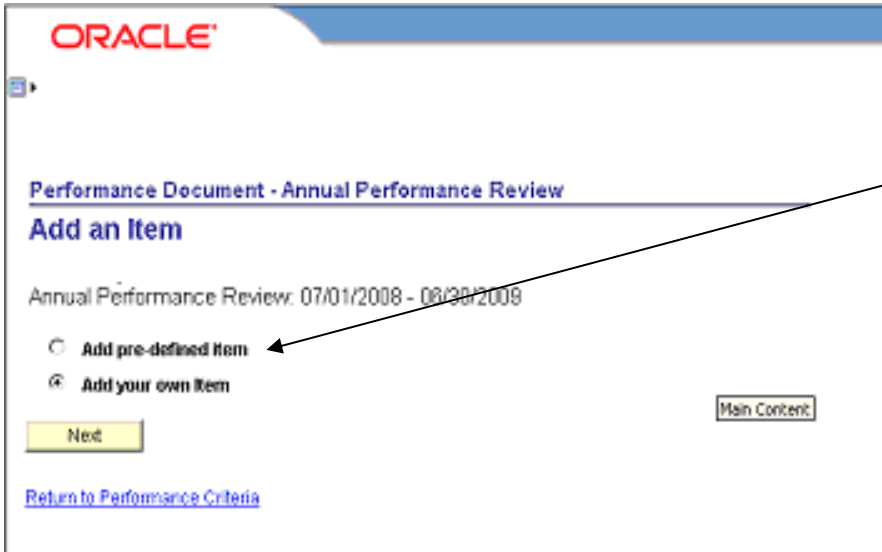
**Assists client/consumer in resolving benefit problems or in**

Details  
**Description:** Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

Step 9: The manager can add an individual goal or competency.

- a) Click “Add Individual Goal / Competencies.”

Step 10



ORACLE

Performance Document - Annual Performance Review

**Add an Item**

Annual Performance Review: 07/01/2008 - 08/30/2009

Add pre-defined item  
 Add your own item

Next

Main Content

[Return to Performance Criteria](#)

Step 10: The manager can add an item.

Click on “Add Your Own Item”.

Step 11

Step 11: Enter the title and long description for the goal you would like to enter.

**ORACLE**

Performance Document - Annual Performance Review

**Add Individual Goals/Competencies**

Annual Performance Review: 07/01/2008 - 08/30/2009

**Title:**

**Description:**   
(1325 characters)

[Return to Performance Criteria](#)

Step 12

Step 12: The manager has now added a goal to the performance evaluation.

**ORACLE**

Performance Document - Annual Performance Review

**Add Individual Goals/Competencies**

Annual Performance Review: 07/01/2008 - 08/30/2009

**Title:**

**Description:**   
(1325 characters)

[Return to Performance Criteria](#)

Click "Update."

Step 13

Step 13: The goal has been added to the performance evaluation.



**ORACLE**

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

**Communication**

Details  
**Description:** Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

+ Add Individual Goals/Competencies - Delete

\*Complete assignments in a timely manner

Details  
**Description:** Complete assignments in a timely manner

Edit Details

+ Add Individual Goals/Competencies - Delete

Section Summary Section Weight: 50 %

[Section 3 - Job Responsibilities](#)

Step 14

Step 14: The manager can delete an item – “Individual Goals/Competencies.”



**ORACLE**

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

**Communication**

Details  
**Description:** Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

+ Add Individual Goals/Competencies - Delete

\*Complete assignments in a timely manner

Details  
**Description:** Complete assignments in a timely manner

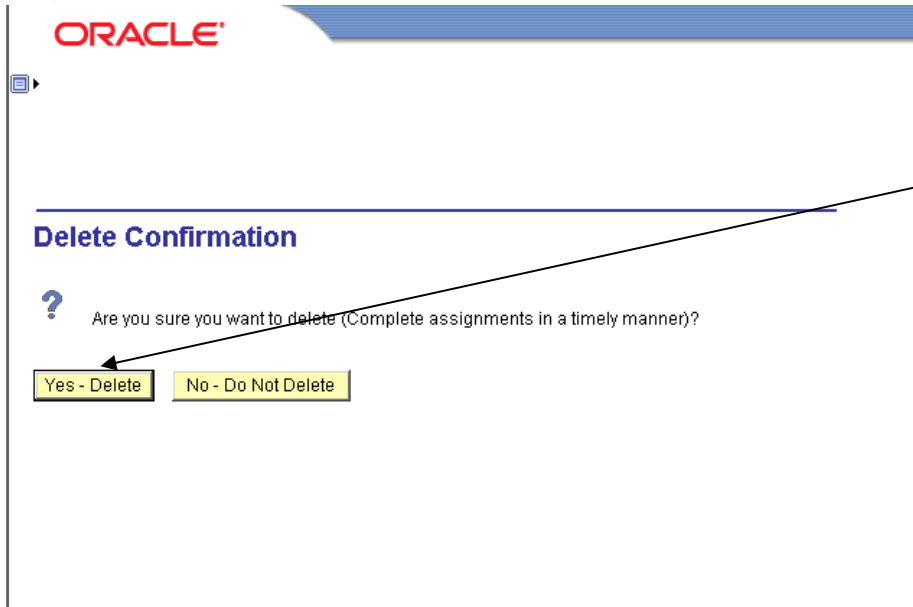
Edit Details

+ Add Individual Goals/Competencies - Delete

Section Summary Section Weight: 50 %

“Delete”  
 Delete

Step 15



Step 15: This goal will be deleted from the performance evaluation.

Click "Yes Delete".

Yes - Delete

The goal has been deleted.

Step 16



Step 16: You can also delete Job Responsibilities in much the same way. In this step you see "Delete All Job Responsibilities" button. Click this button if you want to delete all Job Responsibilities.

It is also possible for a manager to create and add a job responsibility

Step 17

ORACLE

(not less than 25%)

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

**Communication**

Details  
**Description:** Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

+ Add Individual Goals/Competencies - Delete

**Section Summary** **Section Weight:** 50 %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

**Assists client/consumer in resolving benefit problems or in**

Details  
**Description:** Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

Step 17: Looking at Section Weights

After all of the items have been established, the manager should review the section weights for Statewide Core Competencies, Individual Goals/Competencies and Job Responsibilities.. Each of the first three sections has a standard weight that may be modified.

- Section 1 – Statewide Core Competencies – 25% (minimum)
- Section 2 – Individual Goals/Competencies – 50 %
- Section 3 – Job Responsibilities - 25%

All section weights have to add up to 100% before the performance document can be completed. The following steps illustrate how to modify the section weight.

Step 18

ORACLE

Home

Menu

Search:

- Self Service
  - Personal Information
  - Payroll and Compensation
  - Benefits
  - Learning and Development
  - Performance Management
    - My Performance Documents
      - Create Documents
      - Current Documents
      - Historical Documents
    - Other's Performance Documents
    - My Development Documents
    - Other's Development Documents
      - Performance Management Home
      - Performance Notes
      - Leave Balance
      - View Payslip Cloned - WhyNot
      - View Payslips - Check One
  - Manager Self Service
    - Set Up HRMS
      - Change My Password
      - My Personalizations
      - My System Profile

• Critical: Yes

**Section Summary** **Section Weight:** 25 %  
(not less than 25%)

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

+ Add Individual Goals/Competencies

**Section Summary** **Section Weight:** 50 %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

**Assists client/consumer in resolving benefit problems or in**

Details  
**Description:** Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

+ Add Job Responsibilities - Delete

Step 18: Modifying the section weights.

Example:

“Update Statewide Core Competencies” Section weight to 30.

“Update Individual Goals/Competencies” Section weight to 40.

“Update Job Responsibilities” Section weight to 30.

Double click inside a section weight field to type a new section weight.

Step 19

Step 19: Closing Out Planning Phase

Once the manager saves the performance document, the employee will be able to review the information in the performance document as well as make additional changes.

The employee and manager will repeat the process of revising and refining the “evaluation criteria” during the planning phase.

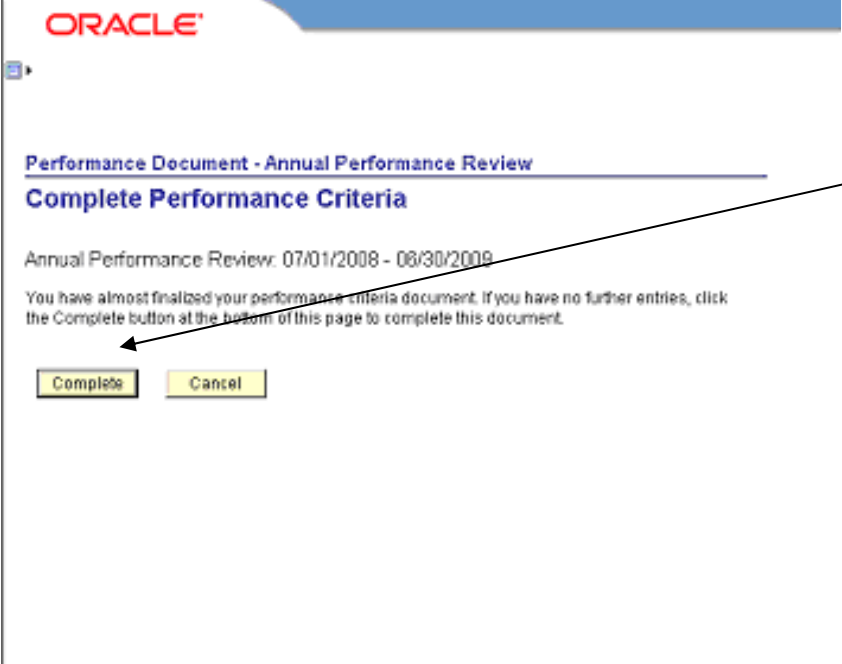
Once the criteria has been entered, the manager will complete the “establish criteria” step.

Step 20

Step 20: The manager completes the “establish criteria” step by:

Clicking “Complete”.

Step 21



Step 21: After clicking “Complete” again, the “evaluation criteria” step will be complete.

When the manager clicks complete, an e-mail will be sent to the employee letting them know the criteria is established.

Step 22



Step 22: Complete the Planning Phase

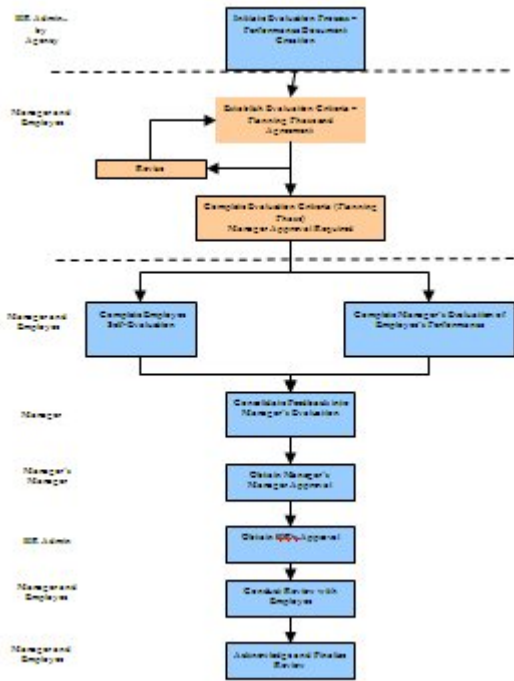
Once the manager has completed the “establish criteria” step it becomes “view only” for the employee and manager.

The employee and manager will be able to view the “establish criteria” section of the performance document throughout the year.

“Establish Evaluation Criteria” box has been checked indicating, “Completed”.

If the Performance Review has simply been saved, then the option to edit the document will be available

**Planning Phase Employee Annual**



Performance Planning

Performance Evaluation

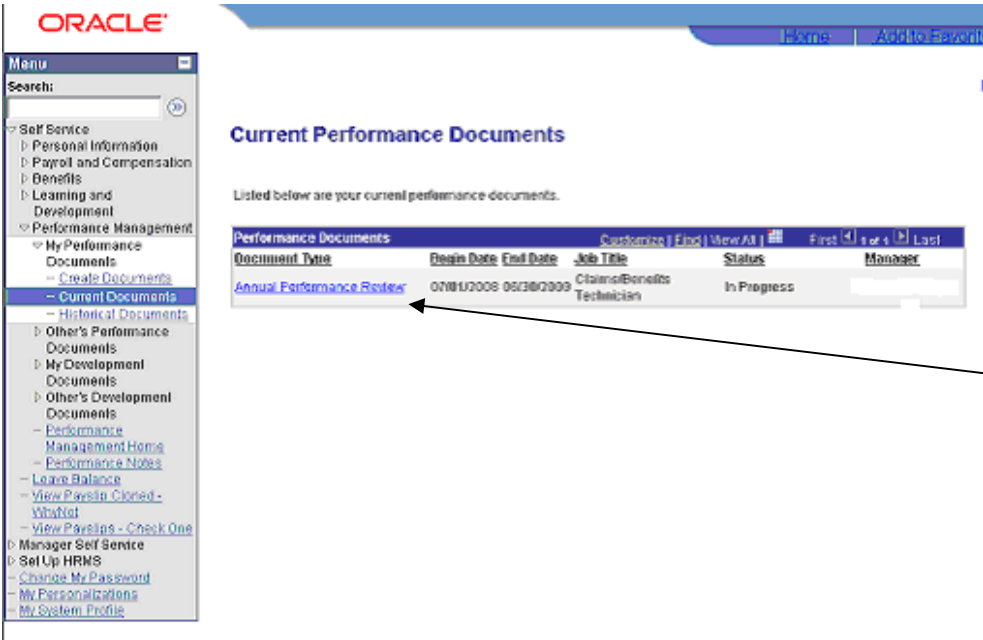
Once the manager/supervisor inputs the performance criteria. The employee will be able to review this document.

The employee is ready to begin this phase of the process.

1. Employee logs into the system.
2. Selects "Self Service" on the menu bar.
3. Selects "My Performance Documents"

These steps are repeated for annual, mid-year and quarterly performance documents.

Step 1



Step 1: Access the “Annual Performance Review” link. Go to the “Current Documents” screen.

To access screen: Self – Service → Performance Management → My Performance Documents → Current Documents

Click “Annual Performance Review” link.  
**Annual Performance Review**

Step 2



Step 2: “Review Established Evaluation Criteria”

Select “View.”  
**View**

Step 3



**ORACLE**

Performance Document - Annual Performance Review

**Performance Criteria - Draft**

Annual Performance Review: 07/01/2009 - 06/30/2009

Save Complete Cancel [Return to Document Detail](#)

[View Printable Evaluation](#) [Notify](#)

**Section 1 - Statewide Core Competencies**

Statewide Core Competencies will be evaluated by:  
Employee, Manager Self Service

**Customer Service Orientation**

Details

**Description:** Understands that all State employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable customer service.

- Critical: Yes

**Teamwork and Cooperation**

Details

**Description:** Cooperates with others to accomplish common goals; works with

Step 3: Review Statewide Core Competencies

There are five Statewide Core Competencies. These competencies will be pre-populated for all employees. There will be NO ability to add or delete in this section.

The following Statewide Core Competencies populate for all evaluations:

- Customer Service Orientation
- Team Work and Cooperation
- Results Orientation
- Accountability
- Judgment and Decision Making

There are two additional Statewide Core Competencies that are generally pre-populated for those individuals in a managerial job.

Step 3



**ORACLE**

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

[+ Add Individual Goals/Competencies](#)

**Section Summary** **Section Weight:**  %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

**Assists client/consumer in resolving benefit problems or in**

Details

**Description:** Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

[+ Add Job Responsibilities](#) [- Delete](#)

**Contacts claimant, relatives, representatives and/or other a**

Details

Step 3: Con't - Review the entries made by your manager in section 2 and 3 of the performance plan by using the scroll bar on the right.

Step 3

**ORACLE**

Performance Document - Annual Performance Review

**Performance Criteria - Draft**

Annual Performance Review: 07/01/2008 - 06/30/2009

Save Complete Cancel [Return to Document Detail](#)

[View Frontable Evaluation](#) [Notify](#)

**Section 1 - Statewide Core Competencies**

Statewide Core Competencies will be evaluated by:  
Employee, Manager Self Service

**Customer Service Orientation**

Details  
**Description:** Understands that all State employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable customer service.  
• Critical: Yes

**Teamwork and Cooperation**

Details  
**Description:** Cooperates with others to accomplish common goals; works with

Step 3: Con't - Review the Section Weights

Review the section weights for: Statewide Core Competencies, Individual Goals/Competencies and Job Responsibilities.

Each of these sections will be pre-populated with a standard percentage, which may be changed.

- Section 1 – Statewide Core Competencies – 25% (Minimum)
- Section 2 – Individual Goals/Competencies – 50 %
- Section 3 – Job Responsibilities - 25%

All section weights have to add up to 100% before the performance document can be completed.

Step 4

**ORACLE**

Performance Document - Annual Performance Review

**Performance Criteria - Draft**

Annual Performance Review: 07/01/2008 - 06/30/2009

Save Complete Cancel [Return to Document Detail](#)

[View Frontable Evaluation](#) [Notify](#)

**Section 2 - Individual Goals/Competencies**

Individual Goals/Competencies will be evaluated by:  
Employee, Manager Self Service

**Communication**

Details  
**Description:** Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

[+ Add Individual Goals/Competencies](#) [- Delete](#)

**Section Summary** **Section Weight:** 50 %

**Section 3 - Job Responsibilities**

Job Responsibilities will be evaluated by:  
Employee, Manager Self Service

**Assists client/consumer in resolving benefit problems or in**

Details  
**Description:** Assists client/consumer in resolving benefit problems or in acquiring benefits as appropriate

Step 4: Finish reviewing your document

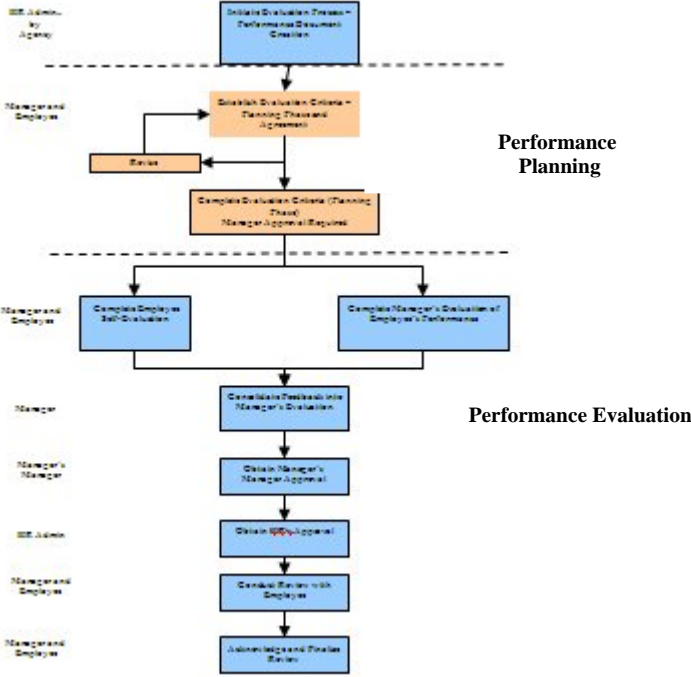
When you are finished with your review, click “Cancel” at the top of the document to return to the menu of the performance documents.

Both manager and employee will be able to view the “Establish Criteria” section of the performance document throughout the year.

**Note:** It is important for the employee not to begin self-evaluation until instructed to do so. The document will have to be re-set by the HR Administrator, which will cause previously entered information to be lost.

**Summary:** The form was pre-populated and you are simply adding goals, competencies, and job responsibilities

**Planning Phase Manager  
Mid-Year and Quarterly**



Once the manager and the employee have completed the planning criteria, the manager will input the performance criteria into the mid-year planning document.

To assist with consistency among the planning documents, the manager could print the Annual Planning Document as a guide or could open a new window inside of PeopleSoft.

The manager will begin this phase of the process by doing these steps:

1. Manager logs into the system.
2. Selects "Manager Self Service" on the menu bar.
3. Selects "Current Documents."
4. Manager enters performance criteria (goals and objectives) into "Establish Evaluation Criteria."
5. Manager completes planning phase.

**Hint:**

You will find these steps exactly the same as entering the annual performance plan.

You will also need to follow these steps for the "Quarterly Plan" if your agency chooses to use a Quarterly Evaluation Plan.

**NOTE:** The manager can either print the document and retype the information or have two windows open from which to copy and paste.

Step 1

**ORACLE**

Menu

Search:

- Self Service
- Manager Self Service
- Job and Personal Information
- Performance Management
  - Performance Documents
    - Current Documents
    - Historical Documents
    - View-Only Documents
  - Approve Documents
  - View Approval Status
  - Direct Records Part Status
  - Document Status Report
  - Mass Approval
  - Performance Review Ratings
  - Maintain Performance Notes
- Set Up HRMS
  - Change My Password
  - My Personalizations
  - My System Profile

Home | Add to Favorites

**Current Performance Documents**

Listed below are the current performance documents for which you are the Manager.

Employee	Document Type	Begin Date	End Date	Job Title	Status
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Clerical	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Claims/Benefits Technician	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Protection & Placement Special	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Clerical	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Claims/Benefits Technician	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Clerical	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Claims/Benefits Technician	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Clerical	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Claims/Benefits Technician	In Progress
	<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Clerical	In Progress

Access the “Mid-Year Performance Review” link. Go to the “Current Documents” screen.

To access screen: Manager Self Service → Performance Management → My Performance Documents → Current Documents

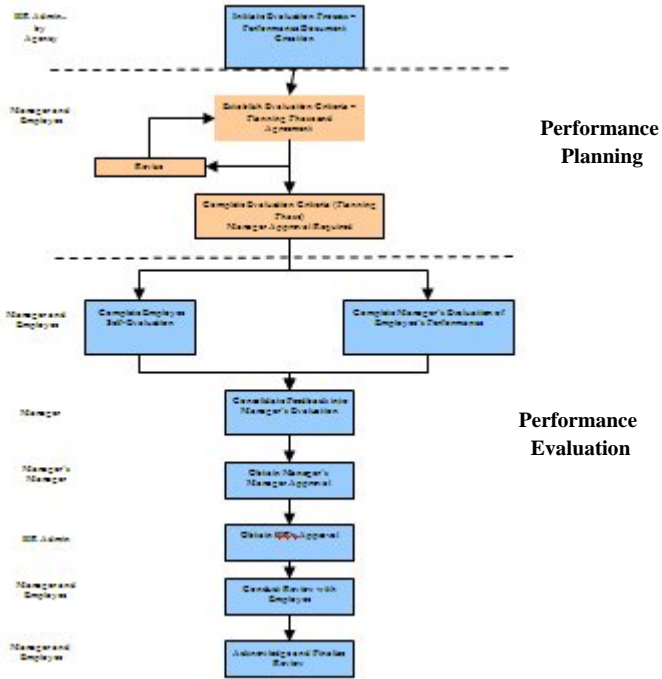
Step 1: Go to screen “Current Documents”.

Click “Mid-Year Performance Review” link corresponding to the appropriate employee.

**Mid-Year Performance Review**

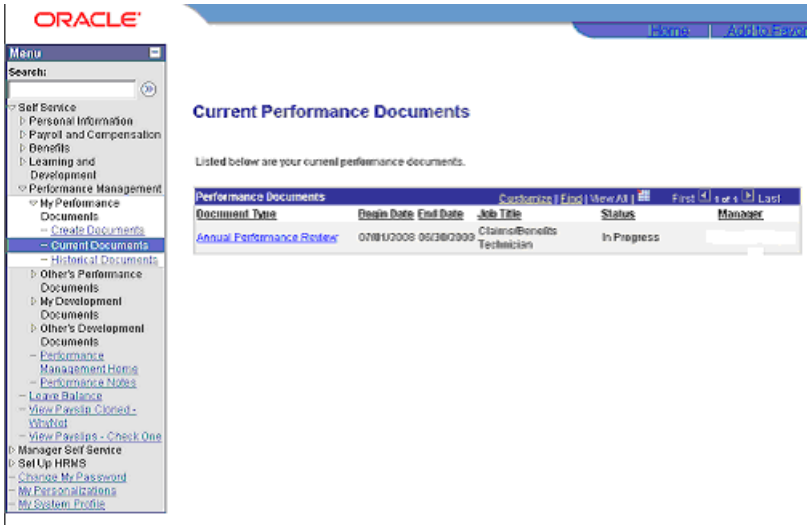
Continue with steps as shown in the manager annual planning process in the planning section of this guide. Once the manager has completed, the “establish criteria” step becomes “view only” for the employee and manager. The employee and manager will be able to view the “establish criteria” section of the performance document throughout the year.

**Planning Phase Employee  
Mid-Year and Quarterly**



Now that the manager has aligned the mid-year quarterly evaluation to the annual evaluation, the employee can go into the system and view the performance criteria for mid-year or the quarterly plan.

## Step 1



**ORACLE**

Home | Add to Favorites

### Current Performance Documents

Listed below are your current performance documents.

Performance Documents	Begin Date	End Date	Job Title	Status	Manager
<a href="#">Annual Performance Review</a>	07/01/2008	06/30/2009	Claims/Benefits Technician	In Progress	

Access the “Quarterly Performance Review” link. Go to the “Current Documents” screen.

To access screen: Self Service → Performance Management → My Performance Documents → Current Documents

## Step 1

Click “Quarterly Performance Review” link corresponding to the appropriate employee.

### Quarterly Performance Review

Continue with Steps as shown in the employee annual planning process in the planning section of this guide. Once the manager has completed the “establish criteria” step the document becomes “view only” for the employee and manager. The employee and manager will be able to view the “establish criteria” section of the performance document throughout the year.