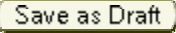# HRMS Online – FY09 Objectives Review
Employee Instructions

The following instructions are employee actions to complete the FY09 Objectives Review process. Remember to click [Save as Draft] to save your work throughout the process.

> Employee enters FY09 objectives and adds ratings & comments only to completed objectives; Employee transfers appraisal to Manager

Initiating Appraisal

Log in to Self Service Applications. Choose Employee Self Service, then Appraisals.

Select 'Create Performance Appraisal' and click [Go].

In Setup Details, Enter Appraisal Period Start Date (01-Jun-08) and Appraisal Period End Date (31-May-09) for the Annual Performance Review Cycle.

Oracle employees hired after 01-Jun-08 *The system will not accept an Appraisal Period Start Date that is prior to your start date with Oracle. If you were hired at Oracle after 01-Jun-08, you should enter your start date in the Appraisal Period Start Date field.*

To enter Template, first click 🖉 . Leave 'Search by Template' blank, and click [Go]. Choose the **"FY09 Appraisal Template"** and click [Select].

Leave Appraisal Creation Date as the defaulted current date.

Leave Appraisal Review Discussion Date blank for the Objectives Review process.
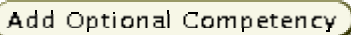
Main Appraiser defaults to current manager.

When setup details are complete, click [Next].

Reviewing Competencies (optional step)

Product Development should not rate or add comments for competencies during the Objectives Review process.

Click "Show Competencies for My Job" to review your competency profile.

Click 🛈 for each competency to view the target proficiency level for your job. To review the behavioral indicators for this proficiency level. Click [OK] to close window.

Product Development does not need to utilize the [Add Optional Competency] function for this Objectives Review cycle.

HRMS Online – FY09 Objectives Review
Employee Instructions

Listing FY09 Objectives

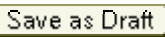| |
|---|
| Click **Add Objective** to enter your FY09 objectives for the FY09 appraisal period |
| Enter "*FY09 - Objective Name*", Start Date and Target Completion Date |
| You may also enter Details, Success Criteria, and Comments for each Objective. |
| Click **Apply and Add Another** to add another objective or **Apply** to return to Overview screen. Repeat for each FY09 objective |

Rating Completed 2009 Objectives (Optional)

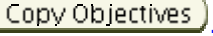To rate your completed FY09 objectives, click ✏ Update Comments.

Enter 100% in the "Complete %" field and then enter the objective achievement date in the "Achievement Date" field. Enter the relevant performance rating from the drop down menu.

Enter comments to support your rating and add any additional comments. Click **Apply** to return to previous screen. Repeat for each completed FY09 objective.

Leave rating area blank for FY09 objectives that have a future target completion date. These will be rated during the Annual Year-End Appraisal process.

If you are not yet ready to transfer the appraisal to your manager, click **Save as Draft** and log out of the Self-Service Applications system.

Copying Objectives (Optional)

To copy objectives that were included in your FY08 appraisal, click **Copy Objectives**. This will bring you to the "Copy Objectives" screen. (This process takes several minutes.)

Enter the "Objective Name" (complete or partial). Click **Go**. Objectives that have been entered into the appraisal application with this name will appear. Click "Show" next to the objective to see the objective details. Check the box next to the appropriate objective and then select **Apply**. The selected objective will then be copied into your FY09 Appraisal Template.

To modify the start date, end date, detail, success criteria, and comments click ✏ Update Details.

Click **Apply** to return to Update screen; Repeat for each objective that you wish to copy.

Note: If you'd like to access your completed FY08 Year End Appraisal, click on the ▦ Details icon next to relevant Appraisal in the "Completed Appraisal" section of the "My Appraisals" screen.
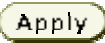
Duplicating Objectives (Optional)

If you would like to duplicate an objective that is currently listed within your FY09 appraisal, click ▣ next to the objective to be duplicated. The objective details will be duplicated into a "Duplicate Objective" screen. You can then make the appropriate edits to the details to create and rate a new objective. Click **Apply** to return to Update screen.

HRMS Online – FY09 Objectives Review
Employee Instructions

Changing or Deleting Objectives
You may only change or delete Objectives that <u>you</u> have entered.
Click ✏ Update Details and change any necessary information. Click ⬭Apply
To delete an Objective, click 🗑 .

Completing Questionnaire (Skip this step)
Product Development will not complete the questionnaire as part of the Objectives Review process.

Adding Participants (Skip this step)
Product Development will not obtain participant feedback as part of the Objectives Review process.

Employee transfers appraisal to manager.

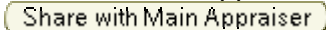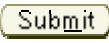| **Transferring Appraisal to Main Appraiser/Manager for Review** |
|---|
| Log in to Self Service Applications. Choose Employee Self Service, then Appraisals |
| Locate the appraisal under "My Appraisals" tab. |
| Click 🖼 next to that Appraisal |
| Click ▶Show to review FY09 Objectives as appropriate. Click ▼Hide to minimize |
| To make changes, click ⬭Update. Click ⬭Continue to move back to the Review screen. |
| To transfer the appraisal for your main appraiser/manager's review, click ⬭Share with Main Appraiser |
| Input comments for Main Appraiser/Manager in Notifications Comments box. Click ⬭Submit |
| Receive 🖳 Confirmation "The appraisal has been submitted to the main appraiser." |

HRMS Online – FY09 Objectives Review
Employee Instructions

Manager schedules an objectives review discussion and transfers performance appraisal back to employee. Manager conducts Objectives Review meeting with employee.

Receive Updated Appraisal from Manager

Your manager will contact you to set up your Objective Review meeting. Prior to this discussion you should receive a notification that your manager has forwarded your performance appraisal with comments and ratings on completed objectives.

Either click on the link within the Notification or Log in to Self Service Applications. Choose Employee Self Service, then Appraisals.

Click Details next to relevant Appraisal that has a status of "Transferred".

Share/View Option: Your manager has an additional option of granting a "view only "of your updated appraisal (without transferring the appraisal to you). Managers may choose this option if they are still in the process of updating/rating objectives and would like your feedback on something, but are not ready to transfer the appraisal to you. If this is the case, you will receive a message to view the latest details of your appraisal. You can click on this message and then click the "View Action" link to see the latest update of your appraisal. (You will not be able to update the appraisal until your manager actually transfers the appraisal to you.)

Click Show next to objectives to view employee/manager comments and ratings/comments on completed objectives. You can also click "Show all details" to view all ratings and comments for FY08 objectives. Click Hide to minimize. Repeat as necessary.

Print a hard copy of the appraisal for the Objectives Review discussion with your manager. Select Printable Page and select File – Print.

Log out of Self-Service Apps

Meet with your manager to discuss your progress to date on FY09 objectives and any additions/revisions to future FY09 objectives.

Revising Objectives following Objectives Review Meeting

Following the Objectives Review meeting with your manager, utilize the following steps to make any additions/revisions to FY09 objectives that were agreed upon with your manager.

Log in to Self Service Applications. Choose Employee Self Service, then Appraisals.

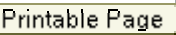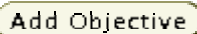Locate the appraisal under "My Appraisals" tab. Click Update next to that Appraisal.

To add additional FY09 Objectives, click Add Objective and enter your FY09 objective information. Click Apply to return to previous screen, or Apply and Add Another to add another objective utilizing the same process. To make changes to your FY09 objectives, click Update Details next to objective to be updated and change any necessary information. Click Apply. You may only change objective details to objectives that you have entered.

Click Save as Draft and log out of the Self-Service Applications system.

HRMS Online – FY09 Objectives Review
Employee Instructions

Performance Appraisal remains with employee until annual Year End Performance Appraisal process begins.

General Hints
To transfer or share the appraisal with the main appraiser at any time in the process, click on [Share with Main Appraiser] All information that you have entered into your performance appraisal will be viewable by your manager (main appraiser) when you "transfer" the appraisal to them within the application.
Click on [Printable Page] to print your entire appraisal
Click on [Save as Draft] frequently to save your work
When receiving a Notification, either click on the link within the Notification to access the appraisal, or log in to Self Service Application and access Appraisals
When the pencil icon is highlighted (✎) you can take action on your appraisal. If it is grayed out (✎) that means it is with the main appraiser and you cannot take action at that time