



Human Resources

Division of Administration  
& Finance

# 2022 ePerformance Evaluation

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EMPLOYEE SELF EVALUATION GUIDE

**UH Human Resources - Compensation**

Select the Performance Module

ORACLE<sup>®</sup> Employee Self Service

<b>Time</b> 	<b>Payroll &amp; Compensation</b> 	<b>My Personal Info</b> 
<b>Benefits Summary</b> 	<b>Performance</b>  Next Due Date <b>04/06/2018</b>	<b>Total Rewards</b>  [No Title] FY17 Total Rewards
<b>Training</b> 	<b>Miscellaneous</b> 	<b>Approvals</b>  3
<b>TRAM Workcenter</b> 	<b>My Campus Account</b> 	

The Performance module automatically opens up to your "Current Documents"

Select the displayed box; this will open your current ePerformance document so that you can complete your Self Evaluation.

Employee Self Service Performance

 **Daisy Duck**   
Admnstr, Business, Asst

**My Current Documents** 1

My Historical Documents

Evaluations of Others 0

Historical Evaluations of Others

### My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Evaluation in Progress	01/01/2018 12/31/2018	02/05/2019 >

In the Steps and Tasks pane, you can see where your document is at in the process and what steps and tasks are still needed.

The document automatically opens up to the phase it's currently in.

Oracle HR92SBX - Home | Sign out | Worklist | Notification | NavBa

Performance Process «

**Steps and Tasks** ↻

Daisy Duck  
Performance Document  
01/01/2018 - 12/31/2018 Overview

- Establish Performance Criteria  
Due Date 04/06/2018
- Complete Self Evaluation**  
Due Date 12/01/2018  
Update and Complete
- Review Manager Evaluation  
Due Date 02/05/2019

Performance Document Save | Complete

**Self-Evaluation - Update and Complete** Print | Notify | Export

**Daisy Duck**

Job Title	Admnstr, Business, Asst	Manager	Angelica Pickles
Document Type	Performance Document	Period	01/01/2018 - 12/31/2018
Template	UH Staff Performance	Document ID	38622
Status	Evaluation in Progress	Due Date	12/01/2018

**Employee Data**

Employee ID	0086140
Department	H0155 Business Services
Years of Service	21 Years 3 Months
Years in Job	1 Years 7 Months

Rating History

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

Section 1 - Employee Goals

You'll need to go through each of the sections below to assign a rating and enter comments on the individual items.  
 Please note that Sections 3 and 4 are both located on the Competencies Tab

<b>TAB</b>	<b><u>Section To Be Completed</u></b>
<b>GOALS</b>	Section 1 - Employee Goals
<b>RESPONSIBILITIES</b>	Section 2 - Responsibilities
<b>COMPETENCIES</b>	Section 3 - Competencies
<b>COMPETENCIES</b>	Section 4 - Customer Service

Performance Process
Performance Document
Save | Complete

**Steps and Tasks**

Daisy Duck  
Performance Document  
01/01/2018 - 12/31/2018 Overview

- Establish Performance Criteria  
Due Date: 04/06/2018
- Complete Self Evaluation  
Due Date: 12/01/2018
- Update and Complete
- Review Manager Evaluation  
Due Date: 02/05/2019

**Self-Evaluation - Update and Complete**

**Daisy Duck**



Job Title: Admnstr, Business, Asst  
 Document Type: Performance Document  
 Template: UH Staff Performance  
 Status: Evaluation in Progress

Manager: Angelica Pickles  
 Period: 01/01/2018 - 12/31/2018  
 Document ID: 38622  
 Due Date: 12/01/2018

**Employee Data**

Employee ID: 0086140  
 Department: H0155 Business Services  
 Years of Service: 21 Years 3 Months  
 Years in Job: 1 Years 7 Months  
[Rating History](#)

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format
Calculate All Ratings

Goals
Responsibilities
Competencies
Overall

**Section 1 - Employee Goals**

Enter ratings and comments for each goal listed below, if applicable.

Select the Goals Tab

The items will be condensed, click "Expand" to expand all items

Performance Document

Self-Evaluation - Update and Complete

Goals | Responsibilities | Competencies | Overall

Save | Complete

Print | Notify | Export

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating: 0.00

Employee Comments

Writing Tools

Created By: Daisy Duck 06/11/2018 2:38PM

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating: 0.00

Employee Comments

Writing Tools

Created By: Angelica Pickles 06/11/2018 2:52PM

Click the drop down arrow to assign a rating for this individual goal.

- 1 - Needs Improvement
- 2 - Generally Meets Expectations
- 3 - Achieved Expectations
- 4 - Exceeds Expectations

\*See Rating Definitions on Last Page of Manual.

Enter your comments (if any) for this individual goal in the Employee Comments box.

The screenshot shows the Oracle HR92SBX Self-Evaluation interface. At the top, there is a navigation bar with 'Worklist', 'HR92SBX - Home', and 'Sign out'. Below this is the Oracle logo and a 'Performance Document' header. The main content area is titled 'Self-Evaluation - Update and Complete' and includes tabs for 'Goals', 'Responsibilities', 'Competencies', and 'Overall'. Under 'Section 1 - Employee Goals', there is a section for 'Goal 1: GOAL 1' with a description and measurement. The 'Employee Rating' dropdown menu is open, showing options: '1-Needs Improvement', '2-Generally Meets Expectations', '3-Achieved Expectations', and '4-Exceeds Expectations'. The current rating is '0.00'. Below the rating is the 'Employee Comments' text area, which contains the comment: 'I met this SMART goal by completing the goal by the established deadline.' The interface also includes 'Save' and 'Complete' buttons, and 'Print', 'Notify', and 'Export' options.

Once you're done with this goal rating and employee comment, continue these same steps for each remaining item (Goal 2, Goal 3, etc..).

Once you've finished rating each Goal, select the Calculator icon in the Goals Summary section.  
This will calculate the ratings assigned for each Goal and display the "Goals Summary Employee Rating".

Performance Document

Self-Evaluation - Update and Complete

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating [4-Exceeds Expectations] 4.00

Employee Comments

Writing Tools

I exceeded this SMART goal by completing the goal before the established deadline.

Created By Angelica Pickles 06/11/2018 2:52PM

Goals Summary

Summary Weight 20 % (not less than 10%)

Employee Rating 0.00

Employee Comments

Audit History

Created By Krista McElroy 06/11/2018 1:41:50PM

Last Modified By Angelica Pickles 06/11/2018 3:05:15PM

You can also include additional overall comments for your Goals section as a whole.

**Goals Summary**

Summary Weight 20 % (not less than 10%)

Employee Rating 3-Achieved Expectations 3.50  

Employee Comments

  Font  Size  **B** *I* U    

Employee can enter additional comments regarding the goals that were set for them if they'd like.

▼ **Audit History**

Created By	Krista McElroy	06/11/2018 1:41:50PM
Last Modified By	Angelica Pickles	06/11/2018 3:05:15PM

Below is an example of the Goals Section with all Ratings and Comments entered.

Performance Document

Self-Evaluation - Update and Complete

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

I met this SMART goal by completing the goal by the established deadline.

Created By Daisy Duck 06/11/2018 2:38PM

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating 4-Exceeds Expectations 4.00

Employee Comments

Writing Tools

I exceeded this SMART goal by completing the goal before the established deadline.

Created By Angelica Pickles 06/11/2018 2:52PM

Goals Summary

Summary Weight 20 % (not less than 10%)

Employee Rating 3-Achieved Expectations 3.50

Employee Comments

Writing Tools

Once you've finished with the GOALS section select "SAVE" in the top right hand corner of your document.  
Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

**Daisy Duck**

	<b>Job Title</b> Admnstr, Business, Asst	<b>Manager</b> Angelica Pickles
	<b>Document Type</b> Performance Document	<b>Period</b> 01/01/2018 - 12/31/2018
	<b>Template</b> UH Staff Performance	<b>Document ID</b> 38622
	<b>Status</b> Evaluation in Progress	<b>Due Date</b> 12/01/2018

**Employee Data**

<b>Employee ID</b> 0086140	
<b>Department</b> H0155	Business Services
<b>Years of Service</b> 21 Years	3 Months
<b>Years in Job</b> 1 Years	7 Months

**Rating History**

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

**Section 1 - Employee Goals**

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

**Goal 1: GOAL 1**

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

I met this SMART goal by completing the goal by the established deadline.

Now that you've evaluated all of your Goals, you're ready to complete Section 2 - Responsibilities.

Select the "Responsibilities" Tab.

The items will be condensed, click "Expand" to expand all items

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

**Daisy Duck**

	<b>Job Title</b> Admnstr, Business, Asst	<b>Manager</b> Angelica Pickles
	<b>Document Type</b> Performance Document	<b>Period</b> 01/01/2018 - 12/31/2018
	<b>Template</b> UH Staff Performance	<b>Document ID</b> 38622
	<b>Status</b> Evaluation in Progress	<b>Due Date</b> 12/01/2018

Employee Data

<b>Employee ID</b>	0086140	
<b>Department</b>	H0155	Business Services
<b>Years of Service</b>	21 Years	3 Months
<b>Years in Job</b>	1 Years	7 Months

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | **Responsibilities** | Competencies | Overall

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

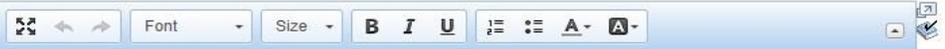
**Expand** | Collapse

- ▶ Responsibility 1: Business Administration- Duty
- ▶ Responsibility 2: Business Administration- Duty
- ▶ Responsibility 3: Business Administration- Duty
- ▶ Responsibility 4: Admnstr, Business, Asst- Summary

Responsibilities Summary

<b>Summary Weight</b>	40 %	(not less than 40%)
<b>Employee Rating</b>	0.00	 

Employee Comments

Writing Tools 

Repeat the same process as you did in Section 1 - Goals.

Enter a Rating for each Responsibility.

Enter a comment (if needed) in each Responsibilities "Employee Comment" section.

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

Expand | Collapse

**Responsibility 1: Business Administration- Duty**

Description : Trains and provides guidance to departmental staff regarding the use of university forms and the application of university and college policies and procedures.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Responsibility rating.

Created By Profile 06/11/2018 1:41PM

**Responsibility 2: Business Administration- Duty**

Description : Assists department staff with personnel issues and maintains personnel files.

Employee Rating: 4-Exceeds Expectations 4.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Responsibility rating.

Created By Profile 06/11/2018 1:41PM

**Responsibility 3: Business Administration- Duty**

Description : Provides financial accountability and ensures compliance with State and university guidelines by functioning as certifying signature authority.

Once you've entered Ratings and/or Comments for each individual Responsibility, select "Collapse".

The individual Responsibilities will condense.

Select the Calculator icon in the Responsibilities Summary section.

This will calculate the ratings assigned for each Responsibility and display the "Responsibilities Summary Employee Rating".

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Employee Data

Employee ID	0086140	
Department	H0155	Business Services
Years of Service	21 Years	3 Months
Years in Job	1 Years	7 Months

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | **Responsibilities** | Competencies | Overall

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

Expand  Collapse

- ▶ Responsibility 1: Business Administration- Duty
- ▶ Responsibility 2: Business Administration- Duty
- ▶ Responsibility 3: Business Administration- Duty
- ▶ Responsibility 4: Admnstr, Business, Asst- Summary

**Responsibilities Summary**

Summary Weight	40 %	(not less than 40%)
Employee Rating	0.00	

Employee Comments 

**Audit History**

Created By: Krista McElroy 06/11/2019 1:41:50PM

You can also include additional overall comments for your Responsibilities section as a whole.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

**Employee Data**

Employee ID	0086140	Business Services
Department	H0155	3 Months
Years of Service	21 Years	7 Months
Years in Job	1 Years	

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

[Goals](#) | [Responsibilities](#) | [Competencies](#) | [Overall](#)

**Section 2 - Responsibilities**

Enter ratings and comments for each responsibility listed below, if applicable.

[Expand](#) | [Collapse](#)

- ▶ **Responsibility 1: Business Administration- Duty**
- ▶ **Responsibility 2: Business Administration- Duty**
- ▶ **Responsibility 3: Business Administration- Duty**
- ▶ **Responsibility 4: Admstr, Business, Asst- Summary**

**Responsibilities Summary**

Summary Weight 40 % (not less than 40%)

**Employee Rating** 3-Achieved Expectations 3.50  

Employee Comments

Writing Tools   Font  Size       

Employee can enter a comment here for the overall Responsibility Summary Rating.

**Audit History**

Once you've finished with the RESPONSIBILITIES section select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

The screenshot displays the Oracle HR92SBX Self-Evaluation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'HR92SBX - Home', and 'Sign out'. The Oracle logo is on the left, and 'Notification' and 'NavBar' are on the right. Below the navigation bar, the page title is 'Performance Document' and 'Self-Evaluation - Update and Complete'. A 'Save' button is highlighted with a red box, and a 'Complete' button is next to it. Below the title, there are 'Print', 'Notify', and 'Export' options. The 'Employee Data' section shows the following information:

Employee ID	0086140	
Department	H0155	Business Services
Years of Service	21 Years	3 Months
Years in Job	1 Years	7 Months

There is a link for 'Rating History' below the employee data. A green checkmark and a message 'You have successfully saved your evaluation.' are highlighted with a red box. Below this, there is a paragraph of instructions: 'Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.' There are buttons for 'Long Format' and 'Calculate All Ratings'. Below that, there are tabs for 'Goals', 'Responsibilities', 'Competencies', and 'Overall'. The 'Responsibilities' tab is selected, showing 'Section 2 - Responsibilities'. There is a paragraph of instructions: 'Enter ratings and comments for each responsibility listed below, if applicable.' There are 'Expand' and 'Collapse' buttons. Below that, there is a section for 'Responsibility 1: Business Administration- Duty'. Underneath, there is a 'Responsibilities Summary' section with the following information:

Summary Weight	40 %	(not less than 40%)
Employee Rating	3-Achieved Expectations	3.50

Below the summary, there is a 'Writing Tools' section with a rich text editor. The text in the editor is: 'Employee can enter a comment here for the overall Responsibility Summary Rating.'

Now that you've evaluated all of your Responsibilities, you're ready to complete Section 3 Competencies and Section 4 Customer Service. Both of these Sections are located on the "Competencies" Tab.

Select the "Competencies" Tab.

The items will be condensed, click "Expand" in each Section (Competencies / Customer Service) to expand all items.

The screenshot displays the Oracle HR92SBX Self-Evaluation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'HR92SBX - Home', and 'Sign out'. Below this is the Oracle logo and a 'Notification' icon. The main content area is titled 'Performance Document' and 'Self-Evaluation - Update and Complete'. A green checkmark indicates that the evaluation has been successfully saved. Below this, there are instructions to enter ratings and comments for each section. The 'Competencies' tab is selected, and the 'Section 3 - Competencies' section is expanded. Under 'Section 3 - Competencies', there are two competency items: 'Competency 1: Knowledge and Skills' and 'Competency 2: Planning & Organizing'. Below these is a 'Competencies Summary' section with a 'Summary Weight' of 20% (not less than 10%) and an 'Employee Rating' of 0.00. There is a text area for 'Employee Comments' with a rich text editor toolbar. The 'Section 4 - Customer Service' section is also expanded, showing 'Responsiveness' and 'Knowledge of Work' items. Below this is a 'Customer Service Summary' section with a 'Summary Weight' of 20% (not less than 10%) and an 'Employee Rating' of 0.00. There is also a text area for 'Employee Comments' with a rich text editor toolbar.

Repeat the same process as you did in Section 1 - Goals and Section 2 - Responsibilities.

### SECTION 3 - COMPETENCIES

Enter a Rating for each Competency item.

Enter a comment (if needed) in each Competencies "Employee Comment" section.

Performance Document | Self-Evaluation - Update and Complete

Goals | Responsibilities | **Competencies** | Overall

Section 3 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

**Competency 1: Knowledge and Skills**

Description : Having achieved a satisfactory level of technical and professional skill or knowledge in position-related areas; keeping up with current developments and trends in areas of expertise.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments: [Rich text editor with text: Employee can enter a comment here for this Competency rating.]

Created By: Angelica Pickles 06/11/2018 2:56PM

**Competency 2: Planning & Organizing**

Description : Establishing courses of action for self and others to ensure that work is completed efficiently.

Employee Rating: 4-Exceeds Expectations 4.00

Employee Comments: [Rich text editor with text: Employee can enter a comment here for this Competency rating.]

Created By: Angelica Pickles 06/11/2018 2:56PM

**Competencies Summary**

Summary Weight	%	(not less than 10%)
Summarv Weight	20 %	(not less than 10%)

Once you've entered Ratings and/or Comments for each individual Competency, select "Collapse".

The individual Competencies will condense.

Select the Calculator icon in the Competencies Summary section.

This will calculate the ratings assigned for each Competency and display the "Competencies Summary Employee Rating".

Performance Document Save | Complete

### Self-Evaluation - Update and Complete

Print | Notify | Export

Employee ID 0086140  
Department H0155 Business Services  
Years of Service 21 Years 3 Months  
Years in Job 1 Years 7 Months  
[Rating History](#)

✔ You have successfully saved your evaluation.  
Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

▼ Section 3 - Competencies  
Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | **Collapse**

▶ **Competency 1: Knowledge and Skills**

▶ **Competency 2: Planning & Organizing**

**Competencies Summary**

Summary Weight 20 % (not less than 10%)  
Employee Rating 3-Achieved Expectations 3.50 

Employee Comments  
Writing Tools 

Employee can enter a comment here for the overall Competencies Summary Rating.

**SECTION 4 - CUSTOMER SERVICE**

**Enter a Rating for each Customer Service item.**

**Enter a comment (if needed) in each Customer Service "Employee Comment" section.**

Performance Document | Save | Complete

Self-Evaluation - Update and Complete | Print | Notify | Export

**Section 4 - Customer Service**

Expand | Collapse

**Responsiveness**

Description : Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Customer Service Rating.

Created By Angelica Pickles 06/11/2018 2:57PM

**Knowledge of Work**

Description : Knowledge of work - the individual is well versed in his/her own expertise as the position requires them to be.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Customer Service Rating.

Created By Angelica Pickles 06/11/2018 2:57PM

**Customer Service Summary**

Summary Weight	20 %	(not less than 10%)
Employee Rating	0.00	

Once you've entered Ratings and/or Comments for each individual Customer Service item, select "Collapse".

The individual Customer Service items will condense.

Select the Calculator icon in the Customer Service Summary section.

This will calculate the ratings assigned for each Customer Service item and display the "Customer Service Summary Employee Rating".

The screenshot shows the Oracle HR Self-Evaluation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'HR92SBX - Home', and 'Sign out'. Below this is the Oracle logo and a 'Notification' icon. The main content area is titled 'Performance Document' and 'Self-Evaluation - Update and Complete'. It includes a 'Save' button and a 'Complete' button. A message states: 'You have successfully saved your evaluation.' Below this, there are instructions: 'Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.' The interface has tabs for 'Goals', 'Responsibilities', 'Competencies', and 'Overall'. The 'Competencies' tab is active, showing 'Section 3 - Competencies'. Under this section, there are two competency items: 'Competency 1: Knowledge and Skills' and 'Competency 2: Planning & Organizing'. Below these is a 'Competencies Summary' section with a 'Summary Weight' of 20% and an 'Employee Rating' of 0.00. The 'Employee Comments' field is empty. The next section is 'Section 4 - Customer Service', which is highlighted with a red box. It has 'Expand' and 'Collapse' buttons, with 'Collapse' also highlighted. Under this section, there are two items: 'Responsiveness' and 'Knowledge of Work'. Below these is a 'Customer Service Summary' section with a 'Summary Weight' of 20% and an 'Employee Rating' of 3.00, which is highlighted with a red box. The 'Employee Comments' field contains the text: 'Employee can enter a comment here for the overall Customer Service Summary Rating.', which is also highlighted with a red box.

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

**Daisy Duck**

	<b>Job Title</b> Admnstr, Business, Asst	<b>Manager</b> Angelica Pickles
	<b>Document Type</b> Performance Document	<b>Period</b> 01/01/2018 - 12/31/2018
	<b>Template</b> UH Staff Performance	<b>Document ID</b> 38622
	<b>Status</b> Evaluation in Progress	<b>Due Date</b> 12/01/2018

**Employee Data**

<b>Employee ID</b> 0086140	
<b>Department</b> H0155	Business Services
<b>Years of Service</b> 21 Years	3 Months
<b>Years in Job</b> 1 Years	7 Months

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | Responsibilities | **Competencies** | Overall

**Section 3 - Competencies**

Enter ratings and comments for each competency and behavior listed below, if applicable.

[Expand](#) | [Collapse](#)

**Competency 1: Knowledge and Skills**

**Competency 2: Planning & Organizing**

**Competencies Summary**

**Summary Weight** 20 % (not less than 10%)

**Employee Rating** 3-Achieved Expectations 3.50  

**Employee Comments**

Writing Tools    Font Size **B** **I** **U**   **A-** **A-**

Employee can enter a comment here for the overall Competencies Summary Rating.

You've now evaluated all of your Goals, Responsibilities, Competencies and Customer Service items.

Now select the "Overall" Tab.

This is where your Overall Performance Review Rating will be.

Click the "Calculate All Ratings" blue icon to calculate your Overall Employee Rating.

You can also include additional overall comments for your overall Performance Review.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

**Daisy Duck**

	<b>Job Title</b> Admnstr, Business, Asst	<b>Manager</b> Angelica Pickles
<b>Document Type</b> Performance Document	<b>Period</b> 01/01/2018 - 12/31/2018	
<b>Template</b> UH Staff Performance	<b>Document ID</b> 38622	
<b>Status</b> Evaluation in Progress	<b>Due Date</b> 12/01/2018	

Employee Data

<b>Employee ID</b> 0096140	
<b>Department</b> H0155	Business Services
<b>Years of Service</b> 21 Years	3 Months
<b>Years in Job</b> 1 Years	7 Months

Rating History

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format **Calculate All Ratings**

Goals | Responsibilities | Competencies | **Overall**

Section 5 - Overall Summary

Employee Rating 3-Achieved Expectations 3.40

Employee Comments

Employee can enter a comment here

Audit History

Created By	Krista McElroy	06/11/2018 1:41:50PM
Last Modified By	Angelica Pickles	06/11/2018 3:18:34PM

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document

Self-Evaluation - Update and Complete

Daisy Duck

Job Title Admnstr, Business, Asst  
Document Type Performance Document  
Template UH Staff Performance  
Status Evaluation in Progress

Manager Angelica Pickles  
Period 01/01/2018 - 12/31/2018  
Document ID 38622  
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Employee Data

Employee ID 0086140  
Department H0155 Business Services  
Years of Service 21 Years 3 Months  
Years in Job 1 Years 7 Months  
Rating History

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

**BEFORE FINALIZING YOUR SELF EVALUATION, ENSURE YOU'VE ENTERED RATINGS FOR EACH ITEM IN EACH SECTION.**

<u>TAB</u>	<u>Section</u>
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 - Customer Service

Now that you've completed your Self Evaluation and verified all items had ratings, you're ready to finalize your Self Evaluation.

Select "Complete" in the top right hand corner of your document next to Save.

Once you select Complete, you'll be re-directed to a confirmation page.

Worklist | HR92SBX - Home | Sign out

Notification | NavBar

Performance Document | Save | Complete

Self-Evaluation - Update and Complete | Print | Notify | Export

**Daisy Duck**

Job Title Adminstr, Business, Asst | Manager Angelica Pickles  
Document Type Performance Document | Period 01/01/2018 - 12/31/2018  
Template UH Staff Performance | Document ID 38622  
Status Evaluation in Progress | Due Date 12/01/2018

Employee Data

Employee ID 0086140  
Department H0155 Business Services  
Years of Service 21 Years 3 Months  
Years in Job 1 Years 7 Months  
Rating History

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

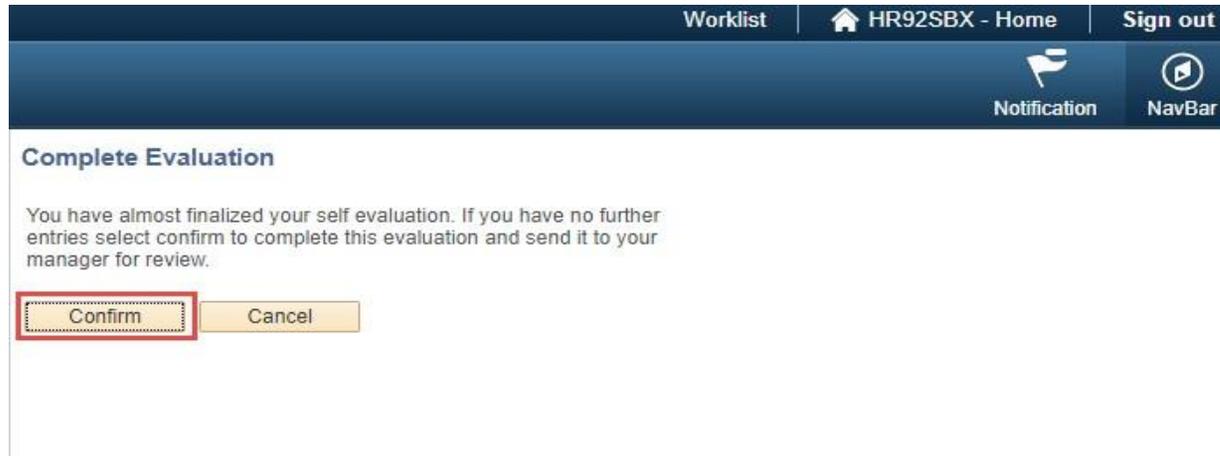
Goals | Responsibilities | Competencies | Overall

Section 5 - Overall Summary

Employee Rating 3-Achieved Expectations 3.40

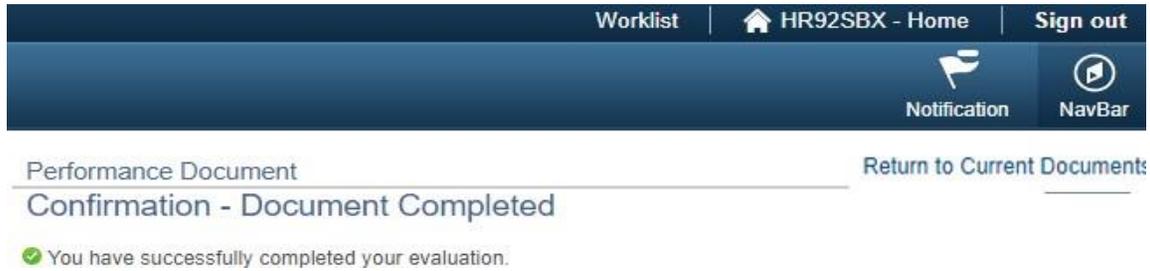
Employee Comments

Once you select Complete, you'll be re-directed to a confirmation page.  
Select "Confirm" to finalize the document.



The screenshot shows a web application interface. At the top, there is a dark blue navigation bar with the following items: 'Worklist', a home icon followed by 'HR92SBX - Home', and 'Sign out'. Below this, a lighter blue bar contains a flag icon labeled 'Notification' and a play icon labeled 'NavBar'. The main content area is titled 'Complete Evaluation' and contains the text: 'You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.' Below the text are two buttons: 'Confirm' (highlighted with a red dashed border) and 'Cancel'.

Once you selected Complete, you'll see a confirmation message letting you know that you successfully completed your Self Evaluation.



The screenshot shows the confirmation page. The top navigation bar is identical to the previous screenshot. Below the navigation bar, the page title is 'Performance Document' on the left and 'Return to Current Documents' on the right. The main heading is 'Confirmation - Document Completed'. Below the heading, there is a green checkmark icon followed by the text: 'You have successfully completed your evaluation.'

Select "Return to Current Documents".

Worklist | [HR92SBX - Home](#) | [Sign out](#)

Notification | NavBar

Performance Document  
Confirmation - Document Completed

[Return to Current Document](#)

✔ You have successfully completed your evaluation.

You've now completed your Self Evaluation.

Favorites ▾ | Main Menu ▾ | Worklist | [HR92SBX - Home](#) | [Sign out](#)

ORACLE® | Notification | NavBar

[New Window](#) | [Help](#) | [Personalize Page](#)

### Current Performance Documents

Daisy Duck

Listed are your current performance documents.

Performance Documents							
Employee ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
0086140	Performance Document	Evaluation in Progress	01/01/2018	12/31/2018	Admnstr, Business, Asst	02/05/2019	Angelica Pickles

If you want to view your completed Self Evaluation,  
 Select the displayed box to open your document.

## Current Performance Documents

Daisy Duck

Listed are your current performance documents.

Performance Documents							
Employee ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
0086140	Performance Document	Evaluation in Progress	01/01/2018	12/31/2018	Admnstr, Business, Asst	02/05/2019	Angelica Pickles

In the Steps and Tasks pane, you'll see a green check mark next to Complete Self Evaluation.  
 You'll also see a status on your document that shows "The document status is Completed".

Favorites ▾ Main Menu ▾ Worklist | [HR92SBX - Home](#) | [Sign out](#)  
**ORACLE** Notification  NavBar 

Performance Process

**Steps and Tasks**

Daisy Duck  
Performance Document  
01/01/2018 - 12/31/2018 Overview

- Establish Performance Criteria  
Due Date: 04/06/2018
- Complete Self Evaluation**  
Due Date: 12/01/2018  
[View](#)
- Review Manager Evaluation  
Due Date: 02/05/2019

Performance Document [Return to Current Documents](#)

**Self-Evaluation - Completed**

**Daisy Duck**

**Job Title** Admnstr, Business, Asst

**Document Type** Performance Document

**Template** UH Staff Performance

**Status** Completed

**Manager** Angelica Pickles

**Period** 01/01/2018 - 12/31/2018

**Document ID** 38622

**Due Date** 12/01/2018

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**Employee Data**

Employee ID 0086140

Department H0155 Business Services

Years of Service 21 Years 3 Months

Years in Job 1 Years 7 Months

[Rating History](#)

The document status is Completed.

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[Long Format](#)

Goals | Responsibilities | Competencies | Overall

# RATING DEFINITIONS

<b>1 - Needs Improvement</b> (1.0 - 1.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.
<b>2 - Generally Meets Expectations</b> (1.80 - 2.79)	Generally meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position required. Occasionally may exceed expectations of the position.
<b>3 - Achieved Expectations</b> (2.80 - 3.79)	Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position required. Meets deadlines. Frequently exceeds in one or more established job expectations.
<b>4 - Exceeds Expectations</b> (3.80 - 4.0)	Consistently exceeds departmental performance to a degree that is obvious to supervisor, customers, and peers. Consistently excels in demonstrating the knowledge, skills, and abilities that result in the effective performance of the position requirements. Consistently serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the entire performance period.