

How to Complete a Non-unit Performance Evaluation in the Oracle HCM Cloud

To begin the evaluation process, the individual whose performance is being assessed completes a self evaluation.

- 1. Log in with your username and password.
- 2. Confirm that the ME tab is selected.
- 3. Click the Career and Performance title.



Click the Performance tile.



Confirm that Calendar Year 2021 appears as the Review Period and click on the link for the Non-Unit Review

Review Period Calendar Year 2021		
Performance Documents		^
All		
Non-Unit Review	Stephen Gall	***
Current Task	Task Completion	
Worker Self-Evaluation	0 / 6	
All Tasks		
Worker Self-Evaluation		
 Manager Evaluation of Workers Share Performance Document 		
O Share Performance Document		
 Confirm Review Meeting Held Confirm Review Meeting Held 		
Commit Review meeting field		

1. Click the **Evaluate** box next to Non-Unit Competencies.

Worker Self-Evaluation: Non-Unit Review	V	Print	Sub <u>m</u> it
Antoinette Deleon			
Non-Unit Overall Summary		Edit 🔨	
Employee Rating	Employee Calculated Rating		
Employee Comments			
Show Additional Info			
Evaluation Topics		^	
Non-Unit Competencies		Evaluato	
0 of 7 rated 0 of 7 commented Employee Rating	Employee Calculated Rating	\bigcirc	
Employee Comments			
Non-Unit Diversity and Performance Questionnaire			
Attachments		~	

After rating each competency, you will click the Save and Close button and the form will update with an overall rating and performance score.

E TCNJ C	Oracle Cloud	Û Û
	Evaluate Topic Non-Unit Competencies	<u>C</u> ancel
	Rate and Comment	
	Evaluate the included competencies.	
	Sort By Competency Name-A to Z	
	Accountability While addressing job-related responsibilities, confirms established processes are followed. Accomplishes job related task and goals by adhering to policies and procedures. Accepts responsibility for actions and engages in appropriate behavior to address work-related issues associated with job. Expectations Behaviors: - Demonstrates ability to notify others of his/her actions that may conflict with TCNJ processes - Takes responsibility for work products, services, and results: does not shift blame on others - Confirms measures to assess college, unit, department, program or project effectiveness - Monitors goals and objectives in a systematic, timely manner and takes necessary action to address areas of concern - Encourages others to take ownership of work products, services, and results: Brade Resting ✓ Mith Great Frequency ✓ Compose Comments ✓ Interma ✓ ✓ ✓ Mathematical and and acception of the second and acception of the second acception of the	

Notice that an Employee Rating is calculated on the basis of the competency evaluation.



Click the Non-Unit Diversity and Performance Questionnaire Evaluate button.



Enter the outcomes for the 2021 performance year and the goals for the 2022 performance year. There are four questions in total. When you are complete with all entries, press Save and Close



Click Edit to enter the Non-Unit Overall Summary.



On this page, enter overall comments about your performance during the period. When complete, press the **Save** button.



Employee entry is now complete. Press the Submit button to begin the manager evaluation.

Submit

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🖉 Edit



Worker Self-Evaluation: Non-Unit Review Antoinette Deleon

(i) Review and evaluate the contents of each section of the evaluation. Click submit when you're done.

Document Details

Non-Unit Overall Summary

Employee Rating With Great Frequency

Employee Comments

Overall a challenging but rewarding year.

Show Additional Info



Employee Calculated Rating

With Great Frequency (28)

Employee Comments

If you have not completed entries for all sections, you may receive a warning message as below. Review the details of the message, and if you would like to make updates, press the No button on the popup and update the document. If you with to not make further entries, press the Yes button.



You have now submitted the document up to your manager for approval. This is confirmed by looking at the green circle next to the Manager Evaluation of Worker task. Tasks with a check mark are complete, whereas those with a horizontal arrow are in process.

Performance Documents		^
All		
Non-Unit Review	Stephen Gall	***
Current Task Manager Evaluation of Workers	Task Completion	
All Tasks Worker Self-Evaluation Manager Evaluation of Workers Share Performance Document Share Performance Document Confirm Review Meeting Held Confirm Review Meeting Held		

The employee's self evaluation has been forwarded to the manager. The manager will view the employee's self assessment and will complete the evaluation.

- 1. Log in with your username and password
- 2. Confirm that the My Team icon is underscored
- 3. Click the Performance title.



Confirm that Calendar Year 2021 appears in the dropdown box. All employees in this cycle will appear. Workers ready for the manager to review appear with a horizontal arrow in the green box next to the Manager Evaluation of Workers task.



Click the Non-Unit Review link.



The manager will **Evaluate** the Non-Unit Competencies.





Employee Rating With Great Frequency Never (0)

Employee Calculated Rating

Once all competencies are evaluated, click Save and Close.

Evaluate Topi Antoinette Deleon	c Non-Unit Competencies			Save and Close Cancel
	Rate and Comment			
	Evaluate the included competencies.			
			Sort By Competency Name-A to Z	
	responsibility for actions and engages in appropriate behavior to addr actions that may conflict with TCNJ processes - Takes responsibility for	cesses are followed. Accomplishes job related task and goals by adhering ress work-related issues associated with job. Expectations Behaviors: - De r work products, services, and results; does not shift blame on others - C bjectives in a systematic, timely manner and takes necessary action to add	monstrates ability — notify others of his/her onfirms measures to assess college, unit,	
	Manager Rating	Employee Rating		
	Always	With Great Frequency		
	Manager Comments			
	Demonstrated full ownership of Project X.			
			Paragraphs: 1, Words: 6, Characters (with HTML): 41	
	Employee Comments			

Evaluate the Non-Unit and Performance Questionnaire.



Manager Evaluation of Workers: Non-Unit Review Manager Rating Manager Calculated Rating With Great Frequency With Great Frequency (28) Employee Rating Employee Calculated Rating With Great Frequency With Great Frequency (28) Manager Comments

Employee Comments

Overall a challenging but rewarding year.

Show Additional Info

Evaluation Topics \sim Non-Unit Competencies 7 of 7 rated | 1 of 7 commented Manager Rating Manager Calculated Rating With Great Frequency (28) With Great Frequency Employee Rating Employee Calculated Rating With Great Frequency With Great Frequency (28) Manager Comments Employee Comments Non-Unit Diversity and Performance Questionnaire

Sub<u>m</u>it

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Attachments

- 1. Enter diversity and performance goals for the 2022 performance cycle (two questions).
- 2. Enter diversity and performance outcomes for the 2021 performance year (two questions).

Note that the employee's survey is available for viewing at the bottom of the page. Press the down area to open it for viewing.

Employee Questionnaire

3. Wh	en you have completed your entries, click Save and Close.	
Questionnaire Antoinette Deleon	2	Save and Close Cancel
6	My Questionnaire	
	Please respond to the following questions: Diversity Goals Planning	
	Diversity is preamizing the opportunity to take advantage of rich backgrounds and abilities of all employees by recognizing and valuing differences, seekin honoring different points of view. Diversity also means practicing mutual respect for qualities and experiences that are different from our own. Expected Behaviors: - Treat members of your team in a respectful and professional manner. - Create meaningful opportunities for team members to interact and enhance greater understanding and appreciation for each other. - Regard, recognize, and value differences in the needs and viewpoints of others. - Ensure that work teams reflect a variety of perspectives, understanding that diverse teams create more dynamic outcomes. - Engage in broad recruitment efforts to facilitate diversity of hiring. - Take advantage of the rich backgrounds and diverse talents of TCN staff. - Attend presentations focusing on topics about intercultural understanding and appreciation. - Pursue community engagement opportunities. - Program development impacting diverse communities. - Develop or participate in multicultural networking opportunities.	ng inclusiveness, and considering and
	Please identify two (2) specific action items that you will implement during this evaluation period that reflect your commitment to diversity.	

Click Edit to open the summary screen.



- 1. Enter comments to summarize the performance results for the year.
- 2. Click Save



Employee Comments

Overall a challenging but rewarding year.

Click Submit

/	

Manager Evaluation of Workers: Non-Unit R Antoinette Deleon	eview	
 Review and evaluate the contents of each section of the evaluati 	ion. Click submit when you're done.	
Document Details		\checkmark
Non Unit Overall Summary		Edit 🔨
Non-Unit Overall Summary		equit 201
Manager Rating	Manager Calculated Rating	
With Great Frequency	With Great Frequency (28)	
Employee Rating	Employee Calculated Rating	
With Great Frequency	With Great Frequency (28)	
Manager Comments		
Another great year!		
Employee Comments Overall a challenging but rewarding year.		
Show Additional Info		
Show Additional Into		
Evaluation Topics		^
Non-Unit Competencies		
7 of 7 rated 1 of 7 commented		
Manager Rating With Great Frequency	Manager Calculated Rating With Great Frequency (28)	
Employee Rating	Employee Calculated Rating	
Employee Kating	Employee Calculated Kating	

You are now taken out of the document. Notice how there is now a horizontal arrow next to the Share Performance Document task. Press the Non-Unit Review link to return to the document.

6	Non-Unit Review Antoinette Deleon HR Generalist		•••
	Current Task Share Performance Document	Task Completion 2 / 6	
	Manager Rating With Great Frequency All Tasks South Worker Self-Evaluation	Employee Rating With Great Frequency	
	 Manager Evaluation of Workers Share Performance Document Share Performance Document Confirm Review Meeting Held Confirm Review Meeting Held 		

The manager should now share and release the document. When released, the document will be visible to the employee. Press the light **Share and Release** button.



The completed evaluation is now available for the employee to review. The employee now enters Oracle to view the document.

- 1. Confirm that the ME icon is underscored.
- 2. Click the Career and Performance title.



Click the Performance tile.



Click the Non-Unit Review link.



The employee is able to view the updated performance evaluation, including the overall summary, the competencies, and the questionnaire. When complete, press the Acknowledge Document button at the top.

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Share Pe Antoinette Di	rformance Document: Non-Unit Review	N		Print
	Review the evaluation details shared by your manager	and acknowledge receipt.	Acknowledge Document	
	Document Details Non-Unit Overall Summary		~	
	Manager Rating With Great Frequency Employee Rating With Great Frequency Manager Comments Another great year! Employee Comments Overall a challenging but rewarding year. Show Additional Info	Manager Calculated Rating With Great Frequency (28) Employee Calculated Rating With Great Frequency (28)		
	Evaluation Topics Non-Unit Competencies 7 of 7 rated 7 of 7 commented Manager Rating With Great Frequency Employee Rating With Great Frequency Manager Comments Employee Comments	Manager Calculated Rating With Great Frequency (28) Employee Calculated Rating With Great Frequency (28)	View	
	Non-Unit Diversity and Performance Questionnaire			

The employee has the option to put additional comments in the box that appears after acknowledge the document. Whether or not comments are filled it, press Submit

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Oracle Cloud					
Share Perform Antoinette Deleon	ance Document				Sub <u>m</u> it Cancel
	Comments				
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				Paragraphs: 0, Words: 0, Characters (with HTML): 0	
	Oracle Cloud Share Perform	Oracle Chud Share Performance Document Antoinette Deleon Comments	Oracle Chud Share Performance Document Antoinette Deleon Comments	Chud Share Performance Document Antoinette Deleon	Chade Chade Antoinette Deleon Comments Fort → 2 → B I U I I II I

The evaluation is now returned to the manager. The manager should schedule a review meeting with the employee to review the document. This is done outside of Oracle. Once the meeting is held, the manager will document the performance discussion taking place.

- 1. Log in with your username and password
- 2. Confirm that the My Team icon is underscored
- 3. Click the Performance title.



Confirm that Calendar Year 2021 appears in the dropdown box. All employees in this cycle will appear. Workers ready for the manager to capture the performance discussion date will appear with a horizontal arrow in the green box next to the first Confirm Review Meeting Held task.

Search Person Q	Hide Filters			
Saved Search			Sort	By End Date - Latest to Ol ∽
ManagerViewFacetedSea 🗸 Save	6	Non-Unit Review Antoinette Deleon HR Generalist		•••
Filters Reset 🌣		Current Task	Task Completion	
Expand All Collapse All		Confirm Review Meeting Held	4 / 6	
Employees Clear		Manager Rating With Great Frequency	Employee Rating With Great Frequency	
All Evaluatees Directs Only		All Tasks Worker Self-Evaluation		
 > Document Type Clear ✓ Standard ☐ Anytime 		 Manager Evaluation of Workers Share Performance Document Share Performance Document Confirm Review Meeting Held Confirm Review Meeting Held 		

The manager clicks the Non-Unit Review link.

Search Person	Q	Hide Filters			
Saved Search					Sort By End Date - Latest to Oli V
ManagerViewFacetedSea		6	Non-Unit Review Antoinette Deleon HR Generalist		***
Filters Expand All Collapse All	Reset 🄅		Current Task Confirm Review Meeting Held	Task Completion 4 / 6	
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Directs Only			All Tasks Worker Self-Evaluation Manager Evaluation of Workers		
 ^ Document Type ✓ Standard △ Anytime 	Clear		 Share Performance Document Share Performance Document Confirm Review Meeting Held Confirm Review Meeting Held 		

The manager then clicks the Indicate Meeting Held link.





Manager enters the date the performance evaluation meeting occurred and then clicks the **Submit** button.

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	Confirm Review Meeting Held Antoinette Deleon	Sub <u>mit</u> Cancel
	Meeting Held Date	

The employee now enters Oracle to confirm they attended the review meeting.

- 1. Confirm that the ME icon is underscored.
- 2. Click the Career and Performance title.



Click the Performance tile.



Employee clicks the Non-Unit Review link.

Performance Documents



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Employee clicks Acknowledge Meeting. Once the meeting has taken place and is acknowledged by the employee, this performance evaluation is complete.

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The employee's evaluation is now complete. If the manager wants to view the document, they will need to perform additional navigation.

- 1. Log in with your username and password
- 2. Confirm that the My Team icon is underscored
- 3. Click the Performance title.



Navigate to the bottom Document Status area and click on Completed

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	Review Period Calendar Year 2021	~			
	Performance Docume	nts			
	Search Person	Hide Filters			
	Saved Search			Sort By End Date - Latest to Oli 🗸	
	ManagerViewFacetedSea V		No results found.		
	Filters Reset	¢	Check your search criteria.		
	Expand All Collapse All				
	^ Employees Cle	r			
	All Evaluatees Directs Only				
	∧ Document Type Cle	r			
	Standard				
	∧ Tasks				
	Assigned to me				
	^ Assignment Type Cle	r			
	Nonprimary				
	✓ Primary				
		r			
	Active Inactive				
	Suspended				
	↑ Document Status Cle	r			
	in progress Completed				
	Completed Canceled				

Now the review appears and can be viewed as it was when still in progress.



Questions?

Email Steve Gall: <u>galls@tcnj.edu</u>