

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 Non-Unit and Grant 2022-2023 appears as the Review Period and click on the link for the Non-Unit and Grant Evaluation 2022-2023.



Click Edit to enter the Non-Unit Overall Summary. This should include a recap of the job duties overall and significant accomplishments over the last 18 months.



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



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



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 account of the service	

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 2022-2023 performance year and the goals for the FY24 performance year. There are four questions in total. When you are complete with all entries, press Save and Close



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 orange chevron are in process.

Performance Documents	erformance Documents				
All					
Non-Unit and Grant Evaluation 2022-2023	Stephen Gall	***			
Current Task	Task Completion				
Manager Evaluation of Workers	1 / 6				
All Tasks					
Self-Evaluation					
Manager Evaluation of Workers					
O Share Performance Document					
O Share Performance Document					
O Confirm Review Meeting Held					
O 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 Non-Unit and Grant 2022-2023 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.

Hide Filters			
Ac	tions 🗸	Sort By	End Date - Latest to OIr \smallsetminus
	Non-Unit and Grant Evaluation 2022-2023 Antoinette Deleon Human Resources Benefits Specialist		
	Current Task	Task Completion	
	Manager Evaluation of Workers	1 / 6	
	Manager Rating	Employee Rating	
	Not Rated Yet	With Great Frequency	
	All Tasks Worker Self-Evaluation Manager Evaluation of Workers Share Performance Document Share Performance Document Confirm Review Meeting Held Confirm Review Meeting Held		

Click the Non-Unit and Grant Evaluation 2022-2023 link.

Non-Unit and Grant Evaluation 2022-2023

Antoinette Deleon

Human Resources Benefits Specialist

Current Task

Manager Evaluation of Workers

Manager Rating

Not Rated Yet

All Tasks

- Worker Self-Evaluation
- Manager Evaluation of Workers
- O Share Performance Document
- O Share Performance Document
- O Confirm Review Meeting Held
- O Confirm Review Meeting Held

Task Completion

1/6

Employee Rating With Great Frequency

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.

Nex, **Evaluate** the Non-Unit Competencies.





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Review and evaluate the contents of each section of the evaluation	on. Click submit when you're done.	
Document Details		~
Non-Unit Overall Summary		🖉 Edit
Manager Rating	Manager Calculated Rating	
Employee Rating	Never (0)	
With Great Frequency	Employee Calculated Rating	
	With Great Frequency (28)	
Manager Comments		
Employee Comments		
Overall a challenging but rewarding year.		
Show Additional Info		
Evaluation Topics		
Non-Unit Competencies		
0 of 7 rated 0 of 7 commented		Evaluate
Manager Rating	Manager Calculated Rating	
Employee Rating	Never (0)	
With Great Frequency	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	
	Accountability Wate addressing job-related responsibilities, confirms established pro responsibility for actions and engages in appropriate behavior to addr actions that may conflict with TCNJ processes - Takes responsibility for department, program or project effectiveness - Monitors goals and ot take ownership of work products, services, and results	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	to policies and procedures. Accepts monstrates ability sunotify others of his/her onfirms measures to assure college, unit. dress areas of concern - End urages others to	
	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			

Now **Evaluate** the Non-Unit and Performance Questionnaire.



Manager [Evaluation of Workers: Non-Unit Revie	2W		Sub <u>m</u> it
Antoinette Dele	eon			
	Manager Rating With Great Frequency	Manager Calculated Rating With Great Frequency (28)		
	Employee Rating With Great Frequency	Employee Calculated Rating With Great Frequency (28)		
	Manager Comments			
	Employee Comments Overall a challenging but rewarding year. Show Additional Info			
	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 With Great Frequency	Employee Calculated Rating With Great Frequency (28)		
	Manager Comments Employee Comments			
	Non-Unit Diversity and Performance Questionnaire		Evaluate	
	Attachments		~	

- 1. Enter diversity and performance goals for the FY24 performance cycle (two questions).
- 2. Enter diversity and performance outcomes for the 2022-2023 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 J Oracle Cloud	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 is promitting the opportunity to take advantage of rich backgrounds and abilities of all employees by recognizing and valuing betternees, 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 TCNJ staff. Attend presentations focusing on topics about intercultural understanding and appreciation. Pursue community engagement opportunities. Program development impacting diverse communities. Diversity of perspectives.	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 Submit

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Manager Evaluation of Workers: Non-Unit Re Antoinette Deleon	eview	
Review and evaluate the contents of each section of the evaluation	on. Click submit when you're done.	
Document Details		~
Non-Unit Overall Summary		🖉 Edit
Manager Rating With Great Frequency	Manager Calculated Rating With Great Frequency (28)	
Employee Rating With Great Frequency	Employee Calculated Rating With Great Frequency (28)	
Manager Comments Another great year!		
Employee Comments		
Overall a challenging but rewarding year. Show Additional Info		
Evaluation Topics		^
Non-Unit Competencies 7 of 7 rated 1 of 7 commented		
Manager Rating	Manager Calculated Rating	
With Great Frequency	With Great Frequency (28)	

You are now taken out of the document. Notice how there is now an orange chevron next to the Share Performance Document task. Press the Non-Unit and Grant 2022-2023 link to return to the document.

0	Non-Unit and Grant Evaluation 2022-2023 Antoinette Deleon Human Resources Benefits Specialist		••
	Current Task	Task Completion	
	Share Performance Document	2 / 6	
	Manager Rating	Employee Rating	
	With Great Frequency	With Great Frequency	
	All Tasks		
	Worker Self-Evaluation		
	Manager Evaluation of Workers		
	Share Performance Document		
	Share Performance Document		
	Confirm Review Meeting Held		
	Commit 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 and Grant Evaluation 2022-2023 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 De	rformance Document: Non-Unit Revie	W		Print
	Review the evaluation details shared by your manage	r 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.	Manager Calculated Rating With Great Frequency (28) Employee Calculated Rating With Great Frequency (28)		
	Show Additional Info			
	Non-Unit Competencies 7 of 7 rated 7 of 7 commented Manager Rating With Great Frequency Employee Rating With Great Frequency Manager Comments	Manager Calculated Rating With Great Frequency (28) Employee Calculated Rating With Great Frequency (28)		
	Employee Comments 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

Share Performance Document Antoinette Deleon Comments Feet 2 B z u E E & R o C * Pergraphs 0, Words 0, Charactern (with HTML) 0	Refreshed from	PROD on January 29.					
Share Performance Document Antoinette Deleon Comments Image: C							
Comments		Share Perform Antoinette Deleon	ance Document				Sub <u>m</u> it Cancel
Font * Z * B I II III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII			Comments				
Paragraphs: 0, Words: 0, Characters (with HTML): 0			Font • 2 • B I	1 日日 🏽 🗶 🛠 ちぐ 🆗			
Paragraphs: 0, Words: 0, Characters (with HTML): 0							
						Paragraphs: 0, Words: 0, Characters (with HTML): 0	

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 Non-Unit and Grant 2022-2023 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 an orange chevron next to the first Confirm Review Meeting Held task.



Non-Unit and Grant Evaluation 2022-2023 Antoinette Deleon

Human Resources Benefits Specialist

Current Task

Confirm Review Meeting Held

Manager Rating With Great Frequency

All Tasks

Worker Self-Evaluation
 Manager Evaluation of Workers
 Share Performance Document
 Share Performance Document
 Confirm Review Meeting Held
 Confirm Review Meeting Held

Task Completion

Employee Rating With Great Frequency ...

The manager clicks the Non-Unit and Grant 2022-2023 link.



Non-Unit and Grant Evaluation 2022-2023 Antoinette Deleon

Human Resources Benefits Specialist

Current Task

Confirm Review Meeting Held

Manager Rating

With Great Frequency

All Tasks

- Worker Self-Evaluation
- Manager Evaluation of Workers
- Share Performance Document
- Share Performance Document
- Confirm Review Meeting Held
- O Confirm Review Meeting Held

The manager then clicks the Indicate Meeting Held link.



Task Completion 4 / 6

Employee Rating With Great Frequency



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

= TCNJ C	Dracle Noud	
	Confirm Review Meeting Held Antoinette Deleon	Sub <u>m</u> it <u>Cancel</u>
	Details *Meeting Held Date	
	02/01/2022	

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 and Grant 2022-2023 link.



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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K Evaluate Perform	nance				
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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				
		r			
	in progress				
	Canceled				

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



Questions?

If you have any questions related to the HCM Cloud processes associated with performance management, please contact **Steve Gall** at **galls@tcnj.edu**. For general inquiries regarding performance evaluations, timelines, or ratings, please contact **Cristi Cartwright** at **cartwric@tcnj.edu**.