



Compensation Workbench Module Training for Managers

Course Duration: 2 Hours

Agenda

01

Overview of CWB Module

02

Access the CWB Module

03

Allocate Budget

Objective

This training will help you understand the CWB module from a manager's perspective. It will guide you to perform the various activities that you are required to perform as a manager through this module.

By the end of this training, you will be able to:

- Allocate budgets for compensation plans



Overview of CWB

PMS Administrator



- Creates performance management Plans
- Creates plans for 90-days assessment

Manager



- Manages team's objective setting
- Manages team's appraisal
- Manages employee's 90-day assessment

Employee



- Sets own objectives
- Initiates self-appraisal



OHRMS

Role of a Manager in PMS



Access PMS Module

ORACLE®

*User Name
(example: michael.james.smith)

*Password
(example: 4039vz5)

Login Assistance

Accessibility

Select a Language:
[Español](#) [English](#)

Privacy Statement

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Enter your login name and password to login

Home Page of the Manager

Logged In As 23156

Oracle Applications Home Page

Main Menu Personalize

- ⊕ [Doral Employee Self-Service, Doral Financial Corporation](#)
- ⊖ [Doral Manager Self Service, Doral Financial Corporation](#)
 - ⊕ [Team's Personal Information](#)
 - ⊕ [Team's Professional Details](#)
 - ⊕ [Team's Qualification Details](#)
 - ⊕ [Team's Deployment](#)
 - ⊖ [Team's Performance Management](#)
 - [Performance Management](#)
 - ⊕ [Succession Planning](#)

Worklist Full List

From	Type	Subject	Sent	Due
There are no notifications in this view.				
✓ TIP		Vacation Rules		
✓ TIP		Worklist Access		

Notification panel where FYI or actionable items are displayed.

Access Performance Management

To manage performance of an employee, go to the **Home Page**, click the **Team's Performance Management** tab, and then click the **Performance Management** link

Oracle Applications Home Page Logged In As 23156

Main Menu Personalize

- ⊕ [Doral Employee Self-Service, Doral Financial Corporation](#)
- ⊖ [Doral Manager Self Service, Doral Financial Corporation](#)
 - ⊕ [Team's Personal Information](#)
 - ⊕ [Team's Professional Details](#)
 - ⊕ [Team's Qualification Details](#)
 - ⊕ [Team's Deployment](#)
 - ⊖ [Team's Performance Management](#)
 - Performance Management**
 - [Succession Planning](#)

Worklist Full List

From	Type	Subject	Sent	Due
There are no notifications in this view.				
✔ TIP Vacation Rules - Redirect or auto-respond to notifications.				
✔ TIP Worklist Access - Specify which users can view and act upon your notifications.				

Click this link to manage performance of an employee.

Agenda

01

Overview of PMS Module

02

Set Objectives

03

Perform Appraisals

04

Conduct Employee 90 Days Assessment

Objective Setting

Objective Setting

- Accessing Reviewer Worker Changes
- Reviewing Objectives
- Viewing Details
- Adding Comment for the Employee

Appraisals

- Accessing 360 Degree Appraisal
- Selecting and Appraising the Employee
- Updating the Appraisal
- Viewing Employee Driving License Information

Employee 90 Days Assessment

- Accessing Employee 90 Days Assessment
- Selecting and Appraising the Employee
- Checking the Overview of the employee
- Providing and Submitting the Final Ratings
- Viewing the Appraisal Details

Objective Setting: Access Reviewer Worker Changes

To review the employees who have completed their objective settings, click the **Go to Task** icon for **Review worker changes** task.

The screenshot shows the Oracle Team's Performance Management interface. The main content area displays a 'Performance Management Task List' table with columns: Focus Task, Process, Start Date, End Date, and Go to Task. The 'Review worker changes' task is highlighted, and its 'Go to Task' icon is circled in red. Below the task list is a 'Notifications Awaiting Your Attention' table with columns: Subject, Sent, Name, Department, Job, Effective Date, Update, and Delete.

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Doral Appraisal 2014		01-Jan-2014	31-Dec-2014	
Cascade or set objectives	Objective Setting	01-Jan-2014	10-Jan-2014	
Transfer scorecards to worker for action	Objective Setting	01-Jan-2014	10-Jan-2014	
Review worker changes	Objective Setting	01-Jan-2014	10-Jan-2014	
Finish objective setting	Objective Setting	01-Jan-2014	10-Jan-2014	
View and track objective progress	Objective Tracking	01-Jan-2014	31-Dec-2014	
Manage appraisals: 360 Degree Appraisal	Appraisal	11-Jan-2014	14-Jan-2014	
Manage appraisals: Mid-Year Appraisal	Appraisal	15-Jul-2014	30-Aug-2014	
Manage appraisals: End Year Appraisal PR	Appraisal	15-Oct-2014	30-Nov-2014	
Manage appraisals: End Year Appraisal US	Appraisal	15-Nov-2014	31-Dec-2014	

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
Education and Qualification for GUZMAN RIVERA, PEDRO	10-Jan-2014	GUZMAN RIVERA, PEDRO	Facilities PR	Specialist	10-Jan-2014		
Qualification	27-Dec-2013	GUZMAN RIVERA, PEDRO	Facilities PR	Specialist	27-Dec-2013		

Click the Go to Task button to check the employees who have completed their objective settings.

Objective Setting: Review Changes

In the Review Changes screen, click the **Action** icon for the employee whose changes you want to review

ORACLE Team's Performance Management



Navigator Favorites Diagnostics Home Logout Preferences Help Personalize Page

Performance Management > Personalize Flow Layout: (SwitchLayoutRN) Logged In As CREUS DEL VALLE, ANTONIO

Review Changes

Name **Appraisal 2014** Objective Setting Deadline **15-Feb-2014**
Start Date **01-Jan-2014** End Date **31-Dec-2014**

Personalize "Worker Scorecards"

Full Name	Assignment Number	Department	Job Name	Position	Status	Action
RIVERA ROSADO, JOSE L	10928	Infrastructure Corporate	Specialist	824.System Specialist III.Corporate.Full Time	Approval Requested	
TORRES GUZMAN, HECTOR R	834	Infrastructure Corporate	Specialist	751.Infrastructure Technician II.Corporate.Full Time	Approval Requested	

[Return to Performance Management](#)

Diagnostics Home Logout Preferences Help Personalize Page

About this Page Privacy Statement Copyright (c) 2008, Oracle. All rights reserved.

Click the Action button to perform a task for the selected employee.

Objective Setting: Review Changes

The manager may conclude the review by clicking on the **Reject**, **Approve**, **Approve and Finish** buttons.

To incorporate additional changes, click on the **Request Further Action** button to resend to the employee.

The screenshot shows a web interface titled "Review Objectives". At the top right, a row of five buttons is highlighted with a red border: "Cancel", "Reject", "Request Further Action", "Approve and Finish", and "Approve". A yellow callout box with an orange background points to these buttons, containing the text: "Click the appropriate button to perform the required action." The main content area displays details for an "Appraisal 2014" for employee "RIVERA RDSADO, JOSE L." in the "Infrastructure Corporate" department. Below this, there are sections for "Changed Objectives", "New Objectives", and "Approved Objectives", each with a "Details Objective Name" section. The "New Objectives" section lists three items: "Increase Insurance sales 50 percent", "Increases Banking Growth", and "Betwter Workforce Management", each with a "Show" link.

Objective Setting: View the Details

Click the appropriate button to perform the required action.

Review Objectives

Cancel Reject Request further Action Approve and finish Approve

Objective Setting Deadline: 15-Feb-2014
End Date: 31-Dec-2014
Assignment Number: 10920
Job Name: Specialist

Created By: RIVERA ROSADO, JOSE L
Aligned With: US Insurance Sales..Targeted state New York, New Jersey, Pennsylvania, Florida.

Weighting Scale: 50
Complete (%):
Measurement Style: Quantitative
Measure Name: Measure in percentage
Unit of Measure: Percent
Type: Maximum
Target Value: 45
Actual Value: 50
Appraise

Success Criteria: Enough skill on sales and marketing.

Comments:
Start Date: 01-Jan-2014
Target Date: 31-Aug-2014
Achievement Date:
Next Review Date:
Group: Customer
Priority: High

Changed Objectives

Details Objective Name
No results found.

New Objectives

Details Objective Name
Show Increase Insurance sales 50 percent
Show Increases Banking Growth
Show Better Workforce Management

Details Objective Name
No results found.

Approved Objectives

New Objectives

Details Objective Name
Show Increase Insurance sales 50 percent

Created By: RIVERA ROSADO, JOSE L
Aligned With: US Insurance Sales..Targeted state New York, New Jersey, Pennsylvania, Florida.

Weighting Scale: 50
Complete (%):
Measurement Style: Quantitative
Measure Name: Measure in percentage
Unit of Measure: Percent
Type: Maximum
Target Value: 45
Actual Value: 50
Appraise

Success Criteria: Enough skill on sales and marketing.

Comments:
Start Date: 01-Jan-2014
Target Date: 31-Aug-2014
Achievement Date:
Next Review Date:
Group: Customer
Priority: High

Show Increases Banking Growth
Show Better Workforce Management

Deleted Objectives

Details Objective Name
No results found.

Approved Objectives

The details of the selected objective.

Objective Setting: Comment for the Employee

The manager may add a comment for your employee that the employee needs to incorporate. After adding the comment, click on the **Submit** button.

The screenshot displays the Oracle Team's Performance Management interface. The page title is "ORACLE Team's Performance Management". The breadcrumb trail is "Performance Management > Review Changes > Review Objectives > Notification Message to Worker". The form contains a text area with the placeholder text "Please enter the description." and a "Submit" button. A red box highlights the text area, and another red box highlights the "Submit" button. A yellow callout bubble points to the text area, and another yellow callout bubble points to the "Submit" button.

Enter the comments for the employee, which he/she needs to incorporate.

After entering the comments, click on the Submit button.

Check Your Understanding

Which button is to be clicked to resend the objectives to the concerned employee?

- Cancel
- Request Further Action
- Reject
- Approve and Resend



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Appraisals

Objective Setting

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- Viewing Details
- Adding Comment for the Employee

Appraisals

- Accessing 360 Degree Appraisal
- Selecting and Appraising the Employee
- Updating the Appraisal
- Viewing Employee Driving License Information

Employee 90 Days Assessment

- Accessing Employee 90 Days Assessment
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- Checking the Overview of the employee
- Providing and Submitting the Final Ratings
- Viewing the Appraisal Details

Perform Appraisals: Access 360 Degree Appraisal

In the **Performance Management** screen, click the **Go to Task** button for **Manage appraisals: 360 Degree Appraisal**.

The screenshot shows the Oracle Performance Management interface. A yellow callout box with an orange arrow points to the 'Go to Task' button for the 'Manage appraisals: 360 Degree Appraisal' task. The interface includes a 'Performance Management Task List' table and a 'Notifications Awaiting Your Attention' table.

Performance Management Task List

Focus Task	Process	Start Date	End Date	Go to Task
<input type="checkbox"/> Doral Appraisal 2014		01-Jan-2014	31-Dec-2014	
Cascade or set objectives	Objective Setting	01-Jan-2014	10-Jan-2014	
Transfer scorecards to worker for action	Objective Setting	01-Jan-2014	10-Jan-2014	
Review worker changes	Objective Setting	01-Jan-2014	10-Jan-2014	
Finish objective setting	Objective Setting	01-Jan-2014	10-Jan-2014	
View and track objective progress	Objective Tracking	01-Jan-2014	31-Dec-2014	
Manage appraisals: 360 Degree Appraisal	Appraisal	11-Jan-2014	14-Jan-2014	
Manage appraisals: Mid-Year Appraisal	Appraisal	15-Jul-2014	30-Aug-2014	
Manage appraisals: End Year Appraisal PR	Appraisal	15-Oct-2014	30-Nov-2014	
Manage appraisals: End Year Appraisal US	Appraisal	15-Nov-2014	31-Dec-2014	

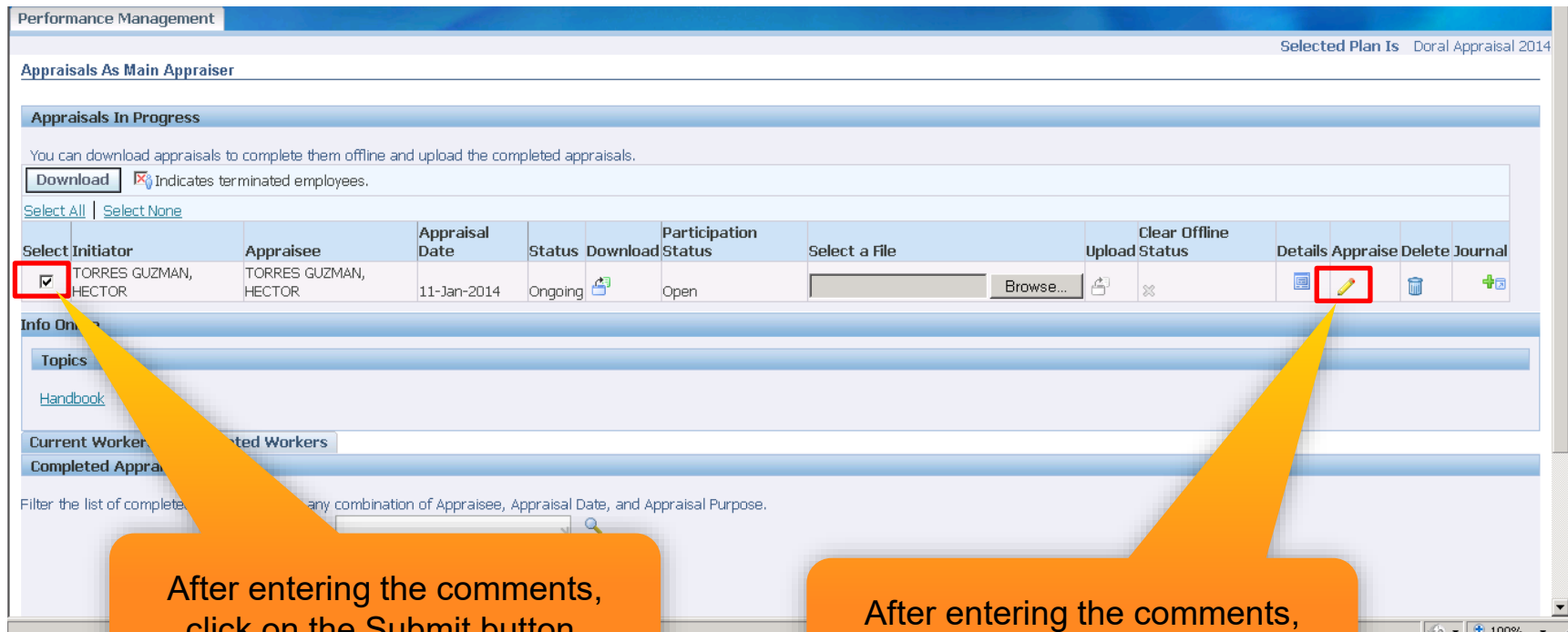
Notifications Awaiting Your Attention

Subject	Sent	Name	Department	Job	Effective Date	Update	Delete
Education and Qualification for GUZMAN RIVERA, PEDRO	10-Jan-2014	GUZMAN RIVERA, PEDRO	Facilities PR	Specialist	10-Jan-2014		
Qualification	27-Dec-2013	GUZMAN RIVERA, PEDRO	Facilities PR	Specialist	27-Dec-2013		

Callout Box Text: Click the Go to Task button for Manage appraisals: 360 Degree Appraisal.

Perform Appraisals: Select and Appraise the Employee

In the **Appraisals In Progress** screen, select the employee whose appraisal you want to update and then click the **Appraise** button.



Performance Management

Selected Plan Is Doral Appraisal 2014

Appraisals As Main Appraiser

Appraisals In Progress

You can download appraisals to complete them offline and upload the completed appraisals.

Download Indicates terminated employees.

Select All | Select None

Select	Initiator	Appraisee	Appraisal Date	Status	Download	Participation Status	Select a File	Clear Offline	Upload Status	Details	Appraise	Delete	Journal
<input checked="" type="checkbox"/>	TORRES GUZMAN, HECTOR	TORRES GUZMAN, HECTOR	11-Jan-2014	Ongoing		Open	<input type="text"/> Browse...						

Info On

Topics

Handbook

Current Workers

Completed Workers

Completed Appraisals

Filter the list of completed appraisals by any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

After entering the comments, click on the Submit button.

After entering the comments, click on the Submit button.

Perform Appraisals: Update Appraisal

The manager will be redirected to this screen. From here, the main appraiser can update and give rating to the selected employee.

ORACLE

Navigator Favorites Preferences Help Close Window

Main Appraiser Review

Employee Name **TORRES GUZMAN, HECTOR**
Organization Email Address 834@doralbank.com
Manager **CREUS DEL VALLE, ANTONIO**

Employee Number **834**
Department **Infrastructure Corporate**
Job **Specialist**

Setup Details

Initiator **TORRES GUZMAN, HECTOR**
Appraisal Purpose **360 Degree**
Period Start Date **01-Jan-2014**
Period End Date **31-Dec-2014**
Template **360 Degree Appraisal**

Main Appraiser **CREUS DEL VALLE, ANTONIO**
Appraisal Date **11-Jan-2014**
Next Appraisal Date

Overall Rating and Comments

Suggested Overall Rating **1-Unsatisfactory**
Overall Rating
Overall Comments
Appraisee Feedback

Manage Participants

Select Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified
------------------	--------------------	--------------------	----------------------	---------------

Click the Update Appraisal button.

Perform Appraisals: Rate Competencies

In the **Update Appraisal** screen, the manager may rate the competency by selecting the appropriate proficiency rating.

Main Appraiser Review >
Update Appraisal

Employee Name: TORRES GUZMAN, HECTOR
Organization Email Address: 834@doralbank.com
Manager: CREUS DEL VALLE, ANTONIO

Employee Number: 834
Department: Infrastructure Corporate
Job: Specialist

Buttons: Cancel, Save as Draft, Apply

Competencies

Add Competencies

Details	Competency	Current Proficiency Level	Appraisee Proficiency Rating	Main Appraiser Proficiency Rating	Update Details	Delete
+ Show	Behavioral.Collaboration ⓘ		3-Effective ⓘ	2-Fairly Effective ⓘ		
+ Show	Behavioral.Execution ⓘ		4-Highly Effective ⓘ	3-Effective ⓘ		
+ Show	Behavioral.Integrity ⓘ		4-Highly Effective ⓘ	1-Needs Development ⓘ		
+ Show	Behavioral.Judgment ⓘ		2-Fairly Effective ⓘ	3-Effective ⓘ		
+ Show	Behavioral.Performance Results ⓘ		3-Effective ⓘ	2-Fairly Effective ⓘ		
+ Show	Behavioral.Professionalism ⓘ		2-Fairly Effective ⓘ	2-Fairly Effective ⓘ		
+ Show	Behavioral.Talent Growth ⓘ		3-Effective ⓘ	2-Fairly Effective ⓘ		



Objectives

Select the appropriate rating for the competency from the drop-down list.

Perform Appraisals: Rate the Objectives

In the **Update Appraisal** screen, the manager may rate the objective by selecting the appropriate proficiency rating.



Details	Objective Name	Start Date	Target Date	Achievement Date	Appraisee Performance Rating	Main Appraiser Performance Rating	Duplicate	Update Comments	Delete
+ Show	Increase Insurance sales 50 percentage	01-Jan-2014	31-Aug-2014		3-Meets Expectation	3-Meets Expectation			
+ Show	Increase Sales Rate 50 percentage	01-Jan-2014	01-Oct-2014		3-Meets Expectation	2-Needs Improvement			

Select the appropriate rating for the objective from the drop-down list.

Perform Appraisals: View Competency Gaps

- 1 In the **Update Appraisal** screen, the manager can also view the gaps in competency.

Click the View Competency Gaps button.

Competency Gaps

Click View Competency Gaps to view the difference between the appraisee's current competencies and those required by their job.

View Competency Gaps

Questionnaire: Appraisee

- 2 After viewing competency gaps, click the Ok button.

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Navigator Favorites Preferences Help Close Window

View Competency Gaps

OK

Competency Gaps

Select one or more competencies, specify the desired proficiency level in the Target Level column, and click Find Courses.

Competency Personal Proficiency Level Essential Minimum Proficiency Maximum Proficiency

No results found.

OK

Click the Ok button after viewing the competency gaps

Privacy Statement

Preference

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Perform Appraisals: View Appraisee Questionnaire

In the **Update Appraisal** screen, the manager can view the appraisee questionnaire.

Competency Gaps

Click View Competency Gaps to view the difference between the appraisee's current competencies and those required by their job. [View Competency Gaps](#)

Questionnaire: Appraisee

Questionnaire Name **Additional Inputs - Employee** Last Submitted On **13-Jan-2014**

[Hide Questionnaire](#)

i) Key Strengths.
Sales and Marketing and good communication skill.

ii) Key Areas of Development.
Attendance

iii) Job Enhancement and Career interests.
Project Execution

Appraisee questionnaire

Perform Appraisals: Complete the Questionnaire

1 In the **Update Appraisal** screen, click the **Complete Questionnaire** button.

Click the Complete Questionnaire button.

Questionnaire: Main Appraiser

Questionnaire Name Additional Inputs - Manager

Last Submitted On

Complete Questionnaire

Feedback

2 Complete the following questions.

Follow the instructions for completing the questionnaire below, then click Apply.

i) Key Strengths.

Sales and Marketing.

ii) Key Areas of Development.

Communication.

iii) Job Enhancement and Career interests.

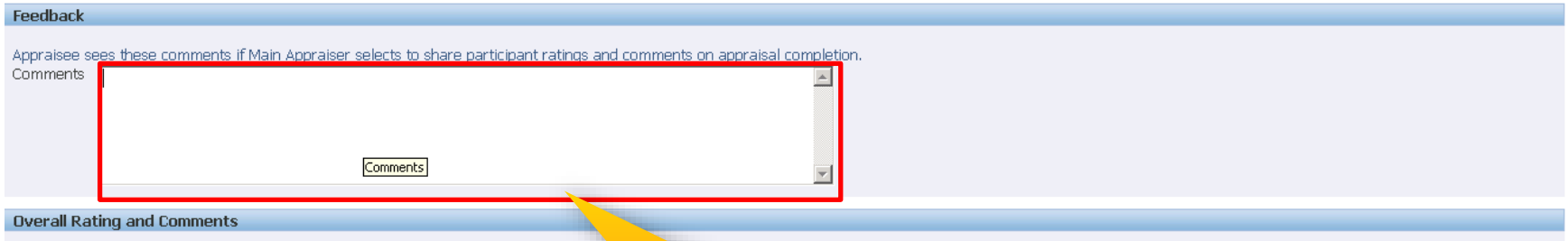
Sales and Marketing.

Complete the following questions.

After completing the questions, click the Apply button.

Perform Appraisals: Share Feedback

In the **Update Appraisal** screen, the manager can share his feedback by writing the comments.



Feedback

Appraisee sees these comments if Main Appraiser selects to share participant ratings and comments on appraisal completion.

Comments

Comments

Overall Rating and Comments

Enter the comments to share your feedback.

Perform Appraisals: Overall Rating and Comments

In the **Update Appraisal** screen, the manager can provide his overall rating and comments.

Overall Rating and Comments

The Suggested Overall Rating is calculated by the application. Enter this value as your Overall Rating if you agree with the calculated rating, or enter another value of your own choice.

Suggested Overall Rating	5-Distinguished
Overall Rating	4-Exceeds Expectation
Overall Comments	

Cancel Save as Draft **Apply**

Help Close Window

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After giving the overall rating and comments, click on the Apply button.

Select the rating from the Overall Rating drop down and enter the comments.

Perform Appraisals: Final Rating for Competency

Competency Ratings

Click Show to view the main appraiser's, the appraisee's, and all participants' ratings.
[Show All Details](#) | [Hide All Details](#)

Details	Competency	Current Proficiency Level	New Proficiency Level	Score
+ Show	Behavioral.Collaboration i		2-Fairly Effective i	2
+ Show	Behavioral.Execution i		3-Effective i	3
+ Show	Behavioral.Integrity i		3-Effective i	1
+ Show	Behavioral.Judgment i		2-Fairly Effective i	3
+ Show	Behavioral.Performance Results i		3-Effective i	2
+ Show	Behavioral.Professionalism i		3-Effective i	2
+ Show	Behavioral.Talent Growth i		4-Highly Effective i	2

Overall Competency Information

Enter overall comments about the appraisee's competency levels.

Total Score: 15
Comments: Verry Good

Objective Ratings

Enter overall comments.

Give the final rating.

Perform Appraisals: Final Rating for Objective

Oracle Self-Service Human Resources: Give Final Ratings: Main Appraiser
http://dev-oraapp01.doral.com:8001/OA_HTML/OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/MARReviewPG&_ri=800&pSco...

[Show All Details](#) | [Hide All Details](#)

Details	Objective Name	Start Date	Target Date	Achievement Date	Comments	Score
Show	Increase Insurance sales 50 percentage	01-Jan-2014	31-Aug-2014			3
Show	Increase Sales Rate 50 percentage	01-Jan-2014	01-Oct-2014			2

Overall Objective Information

Enter overall comments about the appraisee's objective ratings.

Total Score 5

Comments Very Good

Enter overall comments about the appraise' s objective ratings.

Perform Appraisals: Complete the Appraisal

In the **Review** page, click the **Submit** button to complete the appraisal

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name: **TORRES GIZMAN, HECTOR** Employee Number: **834**
Organization Email Address: **SG4@abcbank.com** Department: **Infrastructure Corporate**
Manager: **CREUS DEL VALLE, ANTONIO** Job: **Specialist**

Competency Ratings

Total Score: **15** Comments: **Very Good**

[Show All Details](#) | [Hide All Details](#)

Details: Competency	Current Proficiency Level	New Proficiency Level	Score
Show Behavioral Collaboration		2-Fairly Effective	2
Show Behavioral Execution		3-Effective	3
Show Behavioral Integrity		3-Effective	1
Show Behavioral Judgment		2-Fairly Effective	3
Show Behavioral Performance Results		3-Effective	2
Show Behavioral Professionalism		3-Effective	2
Show Behavioral Talent Growth		4-Highly Effective	2

Objectives

Total Score: **5** Comments: **Very Good**

[Show All Details](#) | [Hide All Details](#)

Details: Objective Name	Start Date	Target Date	Achievement Date	Comments
Show Increase Insurance sales 50 percentage	01-Jan-2014	31-Aug-2014		
Show Increase Sales Rate 50 percentage	01-Jan-2014	01-Oct-2014		

Overall Rating: **4-Exceeds Expectation**
Overall Comments: **Very Good.**

Appraisee Feedback:

Advancement Potential

Readiness Level
Retention Level
Short-Term Work Opportunity
Long-Term Work Opportunity
Potential Details

Details to be Shared with Appraisee

Additional Details ⓘ
 Participant Names
 Participant Ratings

Appraisee Feedback

Provide Feedback on Overall Rating

Approvers

Click the Submit button.

Perform Appraisals: View the Appraisal Detail

At the end the appraisal detail will appear.

Oracle Self-Service Human Resources: Appraisals As Main Appraiser
http://dev-oraapp01.doral.com:8001/OA_HTML/OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/MAFinalRatingsRevPG&ri...

You can download appraisals to complete them offline and upload the completed appraisals.

[Download](#) Indicates terminated employees.

Select Initiator	Appraisee	Appraisal Date	Status	Download	Participation Status	Select a File	Upload	Clear Offline Status	Details	Appraise	Delete	Journal
No results found.												

Info Online

Topics

[Handbook](#)

Current Workers | **Terminated Workers**

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Appraisee:

Appraisal Date:
(example: 13-Jan-2014)

Appraisal Purpose:

[Go](#) [Clear](#)

Appraisee	Appraisal Date	Period Start Date	Period End Date	Appraisal Purpose	Plan	Details	Delete	Journal
TORRES GUZMAN, HECTOR	11-Jan-2014	01-Jan-2014	31-Dec-2014	360 Degree	Doral Appraisal 2014			

Privacy Statement | Performance Management Appraisals | [Close Window](#) | [Preferences](#) | [Help](#)

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The details of the appraisal.

Check Your Understanding

You can rate both Competency and Objective.

State **True** or **False**.



Agenda

01

Overview of PMS Module

02

Set Objectives

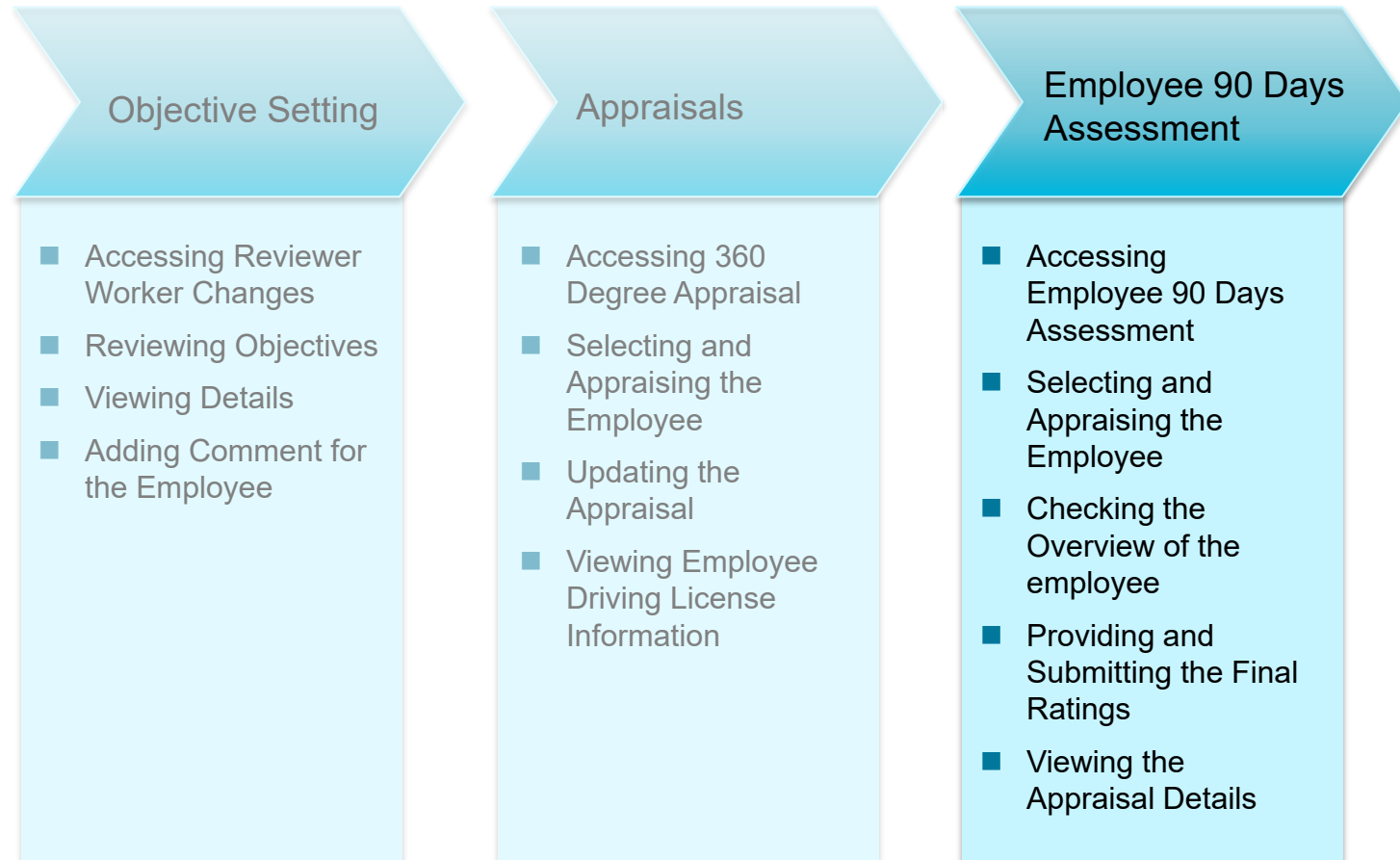
03

Perform Appraisals

04

Conduct Employee 90 Days Assessment

Employee 90 Days Assessment



Conduct Employee 90 Days Assessment: Access 90 Days Assessment

In the **Performance Management** screen, click the **Go to Task** icon for **Manage appraisals: 90 Days Assessment**.

On this page, you can access worker development functions and view performance management notification messages.

Performance Management Task List
[Expand All](#) | [Collapse All](#)

Focus Task	Process	Start Date	End Date	Go to Task
My Plans				
<ul style="list-style-type: none"> Doral Appraisal 2014 <ul style="list-style-type: none"> Cascade or set objectives Transfer scorecards to worker for action Review worker changes Finish objective setting View and track objective progress Manage appraisals: 360 Degree Appraisal Manage appraisals: Mid-Year Appraisal Manage appraisals: End Year Appraisal PR Manage appraisals: End Year Appraisal US Employees 90 Days Assessment-2014 <ul style="list-style-type: none"> Manage appraisals: 90 Days Assessment 	Objective Setting	01-Jan-2014	31-Dec-2014	
	Objective Setting	01-Jan-2014	10-Jan-2014	
	Objective Setting	01-Jan-2014	10-Jan-2014	
	Objective Setting	01-Jan-2014	10-Jan-2014	
	Objective Tracking	01-Jan-2014	31-Dec-2014	
	Appraisal	11-Jan-2014	14-Jan-2014	
	Appraisal	15-Jul-2014	30-Aug-2014	
	Appraisal	15-Oct-2014	30-Nov-2014	
	Appraisal	15-Nov-2014	31-Dec-2014	
	Appraisal	13-Jan-2014	31-Dec-2014	

Logged In As CREUS DEL VALLE, ANTONIO

Switch Manager
 To perform tasks as a different manager, select from the list.

Quick Links

- [Create Standard Appraisal](#)
- [Create 360-Degree Appraisal](#)
- [My Employee Information](#)
- [Education and Qualifications](#)
- [Competency Profile](#)
- [Suitability Matching](#)
- [Event and Bookings](#)
- [Employee Review](#)
- [Other Professional Qualifications](#)

Reports

- [Appraisal Summary](#)

Help

Plan	Attachments
Doral Appraisal 2014	
Employees 90 Days Assessment-2014	

Click the **Go to Task** button for **Manage appraisals: 90Days Assessment**.

Conduct Employee 90 Days Assessment: Select and Appraise the Employee

In the **Appraisals In Progress** screen, select the employee who you want to assess and then click the **Appraise** button.

Performance Management

Selected Plan Is Doral Appraisal 2014

Appraisals As Main Appraiser

Appraisals In Progress

You can download appraisals to complete them offline and upload the completed appraisals.

Download Indicates terminated employees.

Select All | Select None

Select	Initiator	Appraisee	Appraisal Date	Status	Download	Participation Status	Select a File	Clear Offline Upload Status	Details	Appraise	Delete	Journal
<input checked="" type="checkbox"/>	TORRES GUZMAN, HECTOR	TORRES GUZMAN, HECTOR	11-Jan-2014	Ongoing		Open	<input type="text"/> Browse...					

Info Online

Topics

Handbook

Current Workers Terminated Workers

Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Search:

Last Name, Title, First Name

Select the employee you want to access.

After selecting the employee, click the Appraise button.

Conduct Employee 90 Days Assessment: Check Overview of Appraisee

In the **Competencies** section, assign the **Proficiency Rating** for each competency and click the **Continue** button.

Update Standard Appraisal: Overview

Employee Name: BONILLA GIL, JUAN
Organization Email Address: 5181@doralbank.com
Manager: CREUS DEL VALLE, ANTONIO

Employee Number: 5181
Department: Infrastructure Corporate
Job: Specialist

Buttons: Cancel, Save as Draft, Share with Appraisee, **Continue**

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. Click Add Job Competencies to add competencies attached to the job. Clicking Delete removes the competency from this appraisal only.

Buttons: Add Job Competencies, Add Competencies

Competency	Current Proficiency Level	Proficiency Rating	Details	Delete
1.Problem Solving		1-Meets Expectations		
10.Attendance/Punctuality		2-Needs Improvement		
11.Recommendation		1-End Probation - Full Time Status		
2.Decision Making		1-Meets Expectations		
3.Knowledge/Skill		1-Meets Expectations		
4.Communication Skill		2-Needs Improvement		
5.Interpersonal Skills		1-Meets Expectation		
6.Time Management		1-Meets Expectations		
7.Organization Skills		2-Needs Improvement		
8.Quality of Work		2-Needs Improvement		

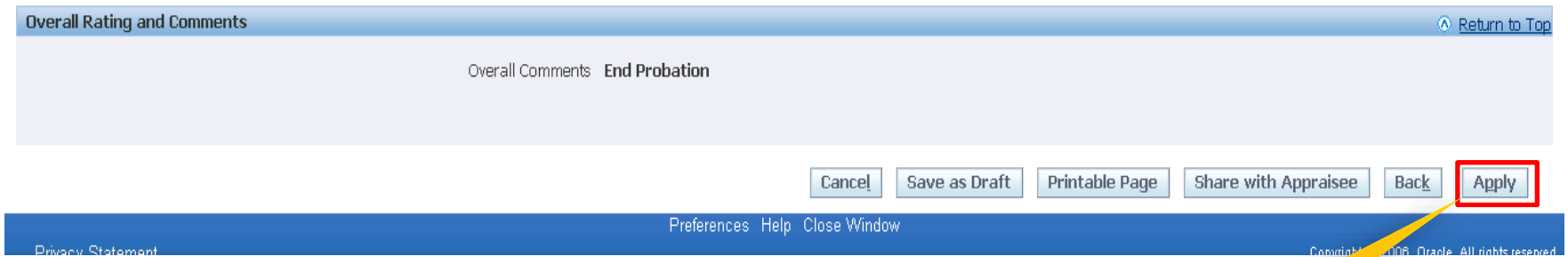
Buttons: Add Job Competencies, Add Competencies

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Click on the Continue button

Conduct Employee 90 Days Assessment: Check Overview of Appraisee

In the Overall Rating and Comments section, click the **Apply** button.



Click on the Apply button

Conduct Employee 90 Days Assessment: Provide Final Ratings

In the **Main Appraiser Review** screen, click the **Give Final Ratings** button and in the next screen, give the ratings.

ORACLE

Confirmation
Your changes have been saved.

Main Appraiser Review

Share With Appraisee Update Appraisal **Give Final Ratings**

Employee Name BONILLA GIL, JUAN
Organization Email Address 5181@oraclebank.com
Manager CREUS DEL VALLE, ANTONIO

Employee Number 5181
Department Infrastructure Corporate
Job Specialist

Manage Participants

Add Participant

Select Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
No results found.								

Competencies

Show All Details | Hide All Details

Details	Competency	Current Proficiency Level	Appraisee Proficiency Rating	Main Appraiser Proficiency Rating
Show	1.Problem Solving			1-Meets Expectations
Show	10.Attendance/Punctuality			2-Needs Improvement
Show	11.Recommendation			1-End Probation - Full Time Status
Show	2.Decision Making			1-Meets Expectations
Show	3.Knowledge/Skill			1-Meets Expectations
				1-Meets Expectations
				1-Meets Expectation
				2-Needs Improvement
				2-Needs Improvement
				1-Meets Expectation

Previous 1-10 Next 10

Previous 1-10 Next 10

Conduct Employee 90 Days Assessment: Submit Ratings

1

As the final step, review the ratings and click the **Submit** button.

ORACLE

Give Final Ratings: Main Appraiser >
Give Final Ratings: Review
To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name BONILLA GIL, JUAN
Organization Email Address 5181@doralbank.com
Manager CREUS DEL VALLE, ANTONIO

Employee Number 5181
Department Infrastructure Corporate
Job Specialist

Competency Ratings

Total Score
Comments End Probation

Cancel Printable Page Back **Submit**

Click the Submit button.

2

Click the **Yes** button to complete the approval.

ORACLE

Warning
You have chosen to complete this appraisal.
You cannot update a completed appraisal. Do you want to continue?.

No **Yes**


Click the Yes button.


Conduct Employee 90 Days Assessment: View the Appraisal Details

In the Complete Appraisal section, you can view the completed appraisals.





Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Appraisee 

Appraisal Date 
(example: 14-Jan-2014)

Appraisal Purpose

Appraisee	Appraisal Date	Period Start Date	Period End Date	Appraisal Purpose	Plan	Details	Delete	Journal
BONILLA GIL, JUAN	13-Jan-2014	01-Jan-2014	31-Dec-2014		Employees 90 Days Assessment-2014			
TORRES GUZMAN, HECTOR	11-Jan-2014	01-Jan-2014	31-Dec-2014	360 Degree	Doral Appraisal 2014			

The details of the appraisal.

