



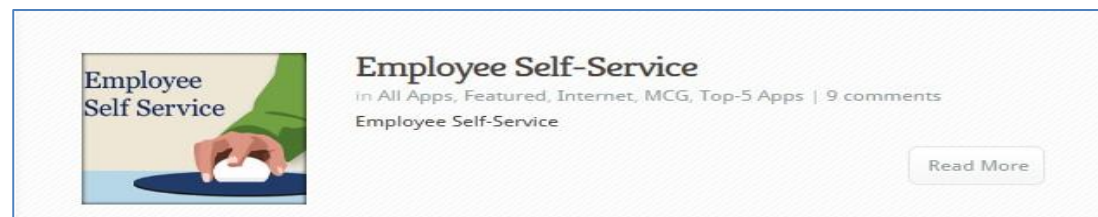
Update a Direct Report Appraisal

Step-by-Step Instructions

- Step 1 Open an [Internet Browser](#).
- Step 2 Navigate to portal.montgomerycountymd.gov.
- Step 3 Sign In to [accessMCG](#).



- Step 4 Click the [Employee Self-Service](#) option.



- Step 5 Click the blue [Go to Employee Self-Service](#) button.



- Step 6 Your *Oracle eBusiness Homepage* opens.

- Step 7 Click the [MCG HR Manager Access](#) link.

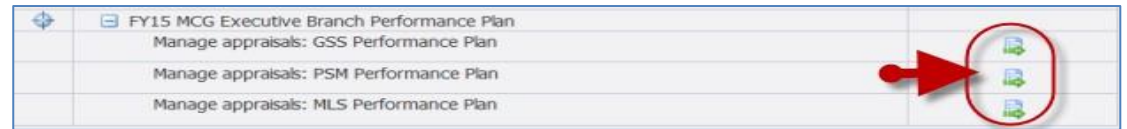


- Step 8 Click the [Performance Management](#) link.



Update a Direct Report Appraisal

Step 9 Click the **Go to Task** icon to the right of the desired Performance Plan group for the correct fiscal year.



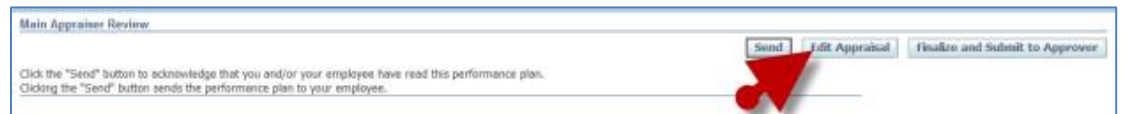
Step 10 Confirm the **Status** says, 'Ongoing with Main Appraiser'.

IMPORTANT: The appraisal status must read 'Ongoing with Main Appraiser' for you to edit it.



Step 11 Click the **Appraise** pencil icon.

Step 12 Click the **Edit Appraisal** button.



Step 13 The **Update Appraisal** page opens. This is the edit page of the appraisal.

Competencies Section

How Competencies can be updated depends on the plan group of the employee

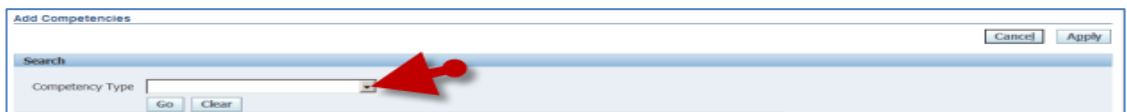
- Competencies cannot be added to or deleted from MLS and PSM appraisals.
- Competencies can be added to GSS appraisals but once the appraisal is shared, cannot be deleted.
- Comments can be added to any appraisal.

❖ ADD COMPETENCIES (GSS appraisals only)

Step 14 Click the **Add Competencies** button in the Competencies section located toward the top of the page.

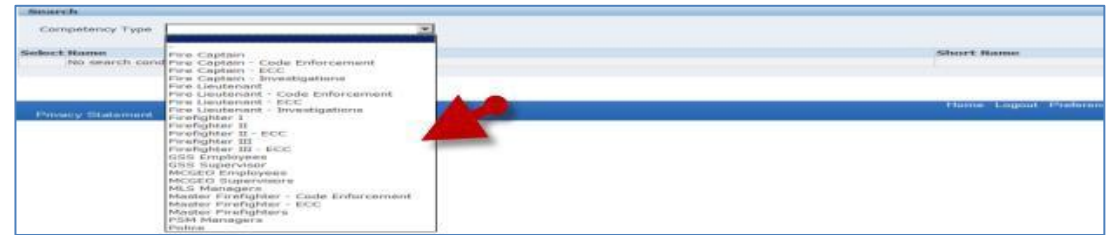


Step 15 Click the Competency Type **Drop-down** button.



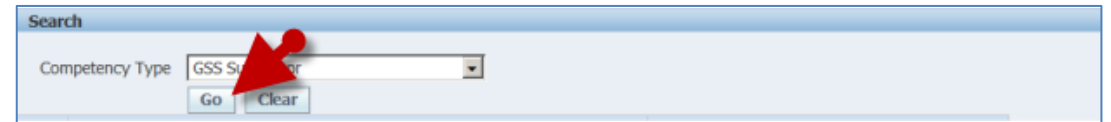
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Step 16 Select the appropriate **Competency Type** for the direct report whose appraisal you're updating.



Step 17 Click the **Go** button. This will display all the Competencies appropriate for the employee type selected.

NOTE: Competencies that are already added to the appraisal will not display in the dropdown list.



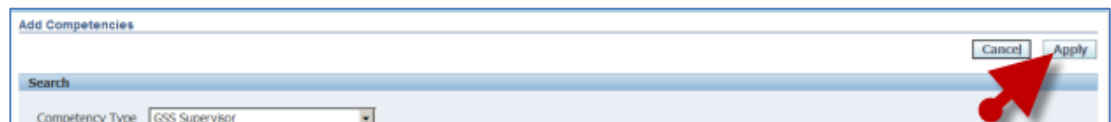
Step 18 Click the **Checkbox** left of all Competencies you wish to add to the appraisal.

REMINDER:

- 'Racial Equity and Social Justice' is required for all employees.
- 'Safe Work Environment' is required for all employees.
- OHR recommends no more than 4-5 competencies.
- Use the Previous/Next navigation links to scroll through all competency options.



Step 19 Click the **Apply** button located at the upper and lower right of the page.



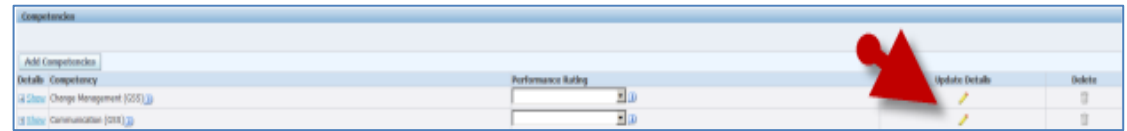
Step 20 You are returned to the main appraisal page (**Update Appraisal**) where the Competencies selected now displays.

IMPORTANT

- Choose carefully. **Competencies cannot be deleted once the appraisal is sent to the employee.**
- Use the *Trash Can* icon, if active, to delete.
- Use the *Update Details* pencil icon to enter comments.
- Remember: Select the 'Racial Equity and Social Justice' competency, if not already affixed to the appraisal. It is required.
- 'Safe Work' competency. It is required

Update a Direct Report Appraisal

Step 21 Click the **Update Details** pencil icon to the far right of the first Competency.



Competency	Performance Rating	Update Details	Delete
4 Close Change Management (201)			
8 Communicate (208)			

Step 22 Enter the current **Date** and **Comments** into the Date & Comments field.

IMPORTANT:

- You must enter a date before your comments as this is the same textbox that will be used end-of-year.
- Do Not enter ratings until the end of the plan year.



Performance Rating: [dropdown]
Date & Comments: [text area]
Maximum entry length is 2000 characters.

Step 23 Click the **Apply** button.

NOTE: Alternatively, you may click the 'Apply and Update Next' button to add comments to the next Competency. Then, click the 'Apply' button when you have reached the last one.



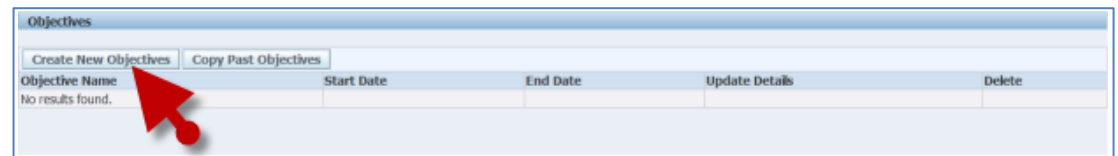
Objectives Section

- Additional Objectives can be added to any appraisal as can comments.
- The instructions below are focused on adding new objectives and comments.
- If you desire to pull objectives from a prior appraisal, refer to 'Quick Start – Copy Past Objectives to a Current Appraisal' for detailed instructions.

❖ ADD NEW OBJECTIVES

Step 24 Scroll to the **Objectives** section of the appraisal. It is immediately below the Competencies section.

Step 25 Click the **Create New Objectives** button in the Objectives section.

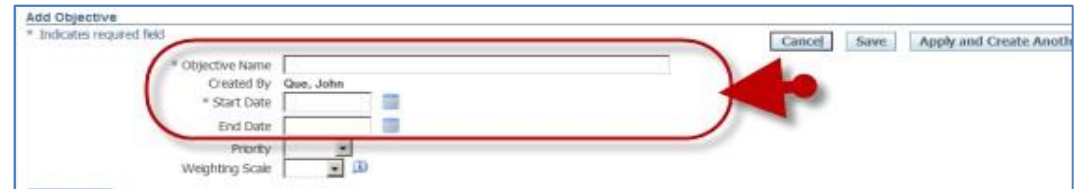


Objective Name	Start Date	End Date	Update Details	Delete
No results found.				

Update a Direct Report Appraisal

Step 26 Enter an **Objective Name**, **Start Date** and **End Date**.

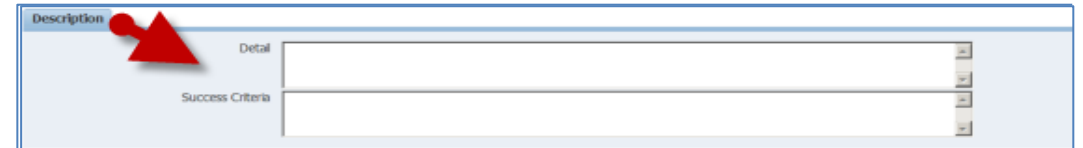
NOTE: Optionally, you may also select a *Priority* (Low, Medium, or High)



Step 27 Enter the desired information into the **Detail** and **Success Criteria** fields.

NOTE:

- Use the 'Detail' field to define the Objective.
- Use the 'Success Criteria' field to outline how the Objective will be measured.



Step 28 **Optional:** Enter **Comments** into the Date & Comments field.

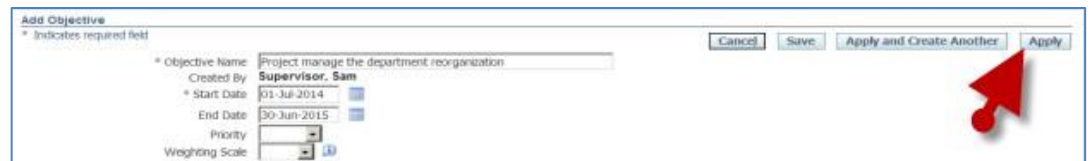
IMPORTANT: You must enter a date before your comments as this is the same textbox that will be used end-of-year.

WARNING: Objectives with comments cannot be deleted once the appraisal is shared.



Step 29 Click the **Apply** button.

NOTE: Alternatively, you may click the 'Apply and Create Another' button to create additional Objectives to add to the appraisal. Then, click the 'Apply' button after you have created the last Objective.



Step 30 You are returned to **Update Appraisal** page where the Objectives you created now display.

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❖ ADD OBJECTIVE COMMENTS

Step 31 Click the **Update Comments** pencil icon to the far right of the first Objective.



The screenshot shows a table with columns: Objective Name, Start Date, End Date, Performance Rating, Update Comments, and Delete. The first row contains 'Customer Service', '01-Jul-2014', '30-Jun-2015', and a dropdown menu. A red arrow points to the pencil icon in the Update Comments column.

Step 32 Enter comments into the **Date & Comments** field.

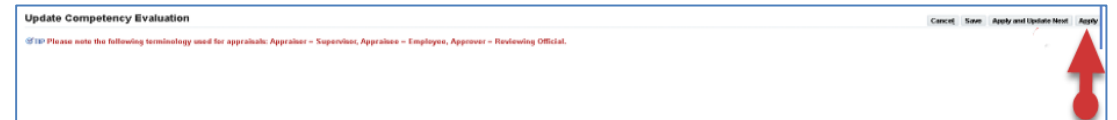


The screenshot shows a dialog box with a 'Date & Comments' text area. A red arrow points to this field. Below it is a 'Performance Rating Scale' table.

Rating Scale	Behavioral Indicator
Does Not Meet Expectations	This rating category indicates that the employee has not met the basic requirements of the job.
Below	This rating category indicates that the employee has met some job requirements

Step 33 Click the **Apply** button.

NOTE: Alternatively, you may click the 'Apply and Update Next' button to add Date & Comments to the next Objective. Then, click the 'Apply' button when you have reached the last one.



The screenshot shows a dialog box with buttons: Cancel, Save, Apply and Update Next, and Apply. A red arrow points to the Apply button.

Learning Path Section

Skip this section. It is not used for WPM.

Participant Section

Skip this section. Updates are not applicable to this section.

Career Development Section

- The Career Development field is a textbox in which you may enter a Career Development goal(s) for your direct report.
- To update, simply add to or overwrite the existing entry.

Update a Direct Report Appraisal

❖ ADD OR UPDATE CAREER DEVELOPMENT GOAL

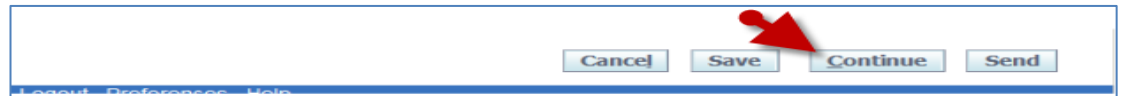
Step 35 Scroll down to the **Career Development** section toward the bottom of the page.

Add Text and/or **Overwrite** the existing text.



Career Development
Maximum entry limited to 150 characters
Career Development (Manager)

Step 36 Click the **Continue** button.

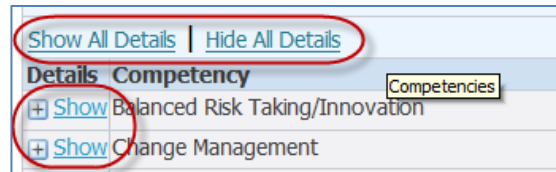


Cancel Save Continue Send

Step 37 **Review** your work.

NOTE:

- Display/hide details individually using the **+Show/-Hide** links.
- Display/hide all details using the **Show All Details/Hide All Details** links
- **All Details** links
- Use the Oracle navigation buttons to cancel, save (and continue working), print, go back a page, send the appraisal to the employee, or apply/save changes to exit.
- Never use the browser's Back button to navigate Oracle.



Show All Details | Hide All Details
Details Competency
+ Show Balanced Risk Taking/Innovation
+ Show Change Management



Cancel Save Printable Page Back Send Apply

Step 38

A. If you now wish to send the appraisal to the employee for their review,

1. Click the **Send** button. Once clicked, the *Share Appraisal Details with Appraisee* page displays.
2. Enter any desired comments in the 'Notification Message to Appraisee' textbox.
3. Then, click the **Submit** button.

For more detailed instructions, refer to 'Quick Start – Send a Direct Report their Appraisal'

B. Alternatively, if you wish to save, retain possession of the appraisal and exit,

- Click the **Apply** button located in the upper and lower right of the page.
- Once clicked, you're returned to the *Appraisals as Main Appraiser* page where

End of Procedure



Cancel Save Printable Page Back Send Apply