Performance Ratings Overview

The Department of Human Resource Management (DHRM) maintains annual performance cycles and cycle effective dates. DHRM also communicates the applicable open/closed dates through normal business processes.

Performance Ratings are annually collected and entered for all VPA employees.

During the annual performance rating cycle, Agency HR will now upload all ratings for their employees (X-Extraordinary, C-Contributor, B-Below Contributor, L- Employee on Leave or Not Rated). For further information on how to complete this via a Mass Upload, see the Job Aid titled **HR351_Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The Agency HR will also have the option to manually enter a rating for each employee directly into Cardinal via the Performance Rating page.

This Job Aid outlines steps to complete the manual performance rating entry:

1. Manually enter an employee's rating as "C – Contributor", "B – Below Contributor", "X – Extraordinary", or "L – Employee on Leave or Not Rated"
2. Update the Re-Evaluation Status for a "B- Below Contributor" or "L- Employee on Leave or Not Rated"

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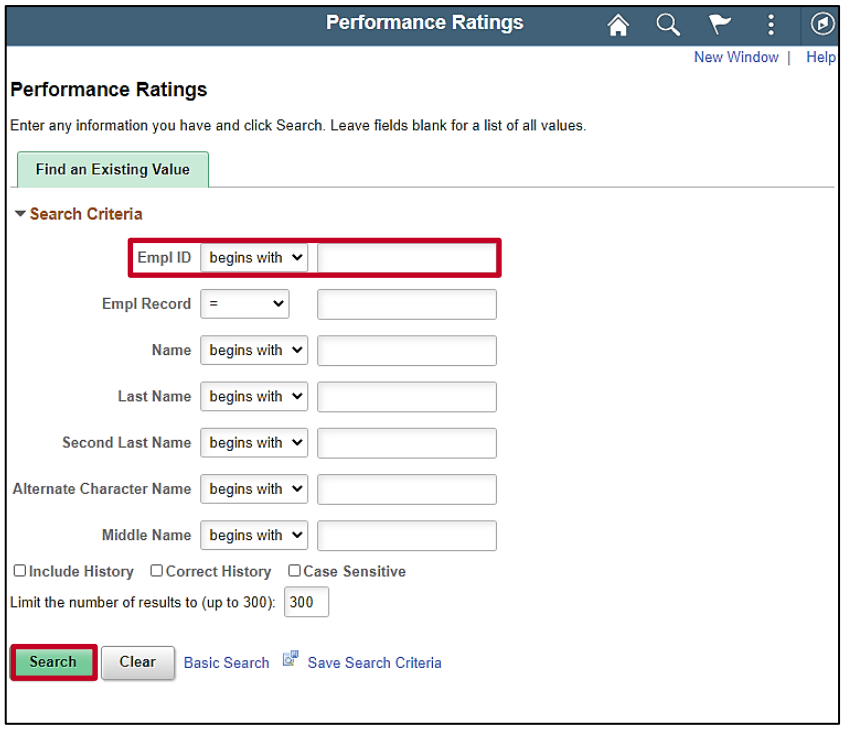
Updating Contributor Performance Ratings to Below Contributor or Extraordinary or Employee on Leave or Not Rated

1. Navigate to the **Performance Ratings** page using the following path:

   Navigator > Workforce Development > Performance Management > Performance Ratings

The **Performance Rating Search** page displays.



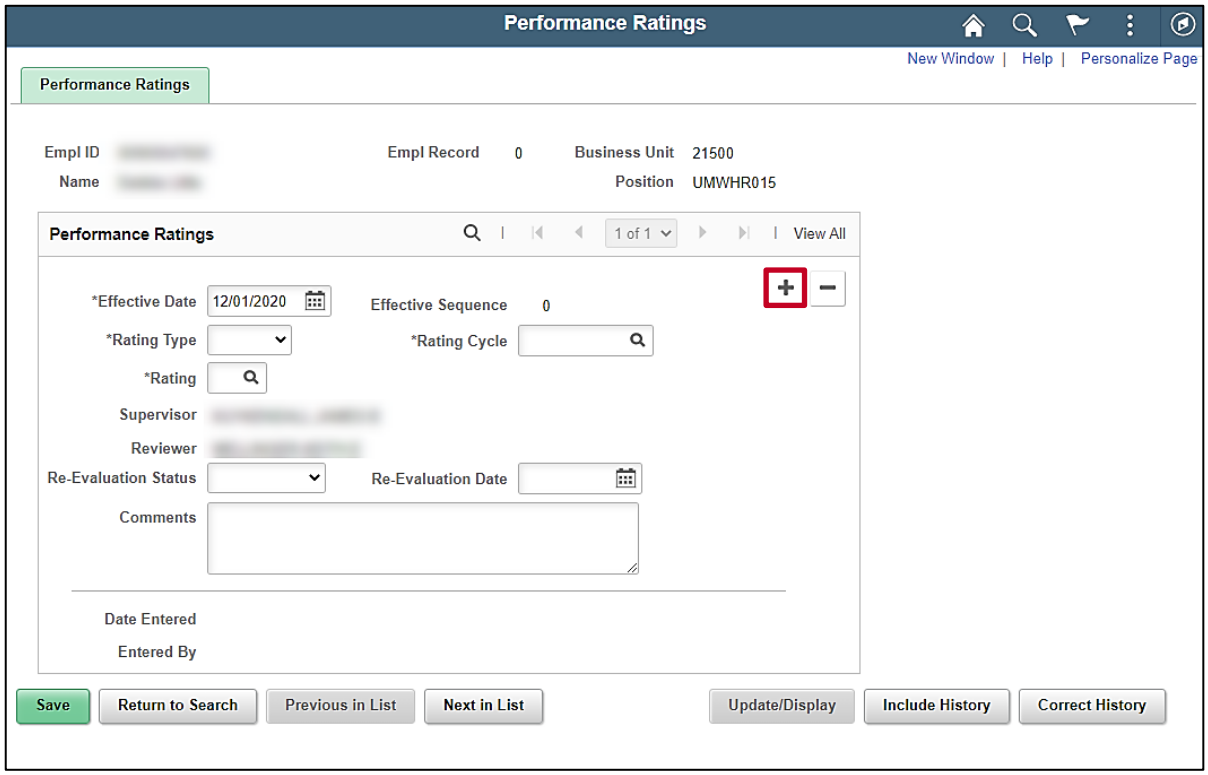
2. Enter the employee's Employee ID in the **Empl ID** field.

3. Click the **Search** button.

   Note: You can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. For further information and tips and tricks on searching for employees, reference the WBT titled **NAV205_Navigation in Cardinal HCM**. This WBT can be found on the Cardinal website under **Learning**.

   Note: Cardinal security settings only allow users to view employees within their Agency.

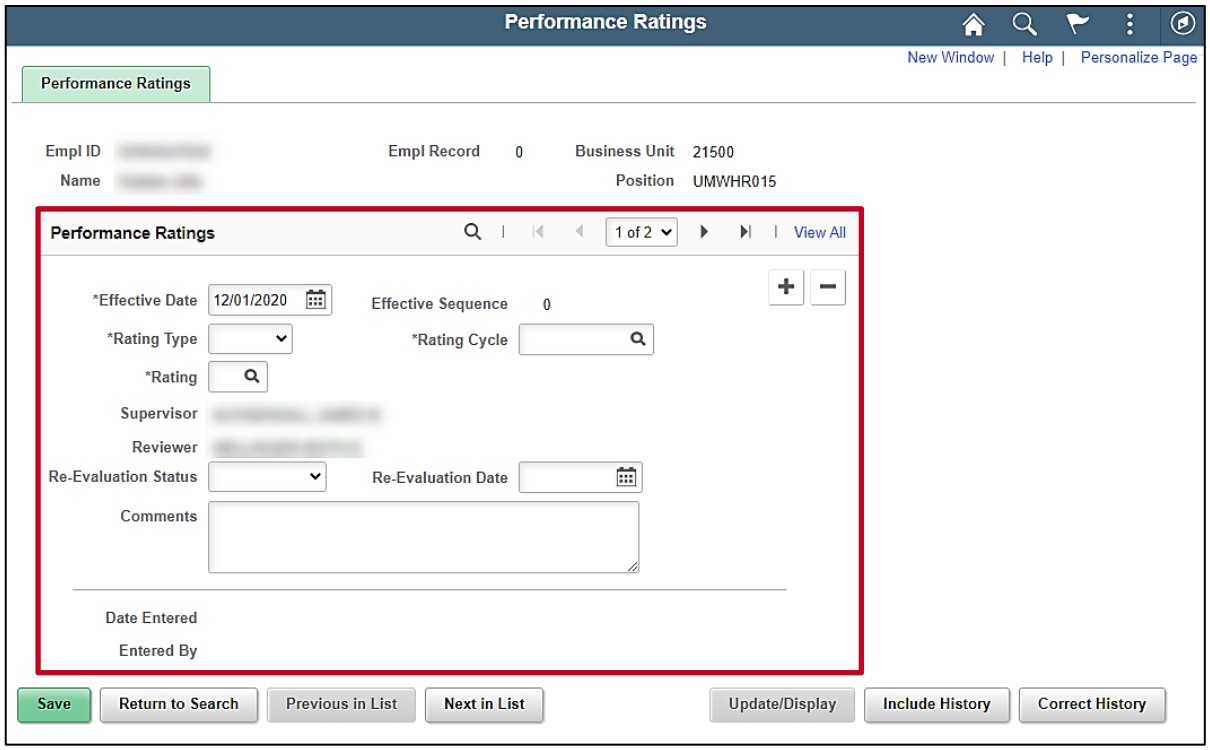
The **Performance Ratings** page displays.



4. Click the **Add a New Row** icon (**+**) to add a new effective dated row.

   Note: If the employee does not already have a performance rating record, a new row does not need to be added. Proceed to step 8.

5. The **Performance Ratings** page refreshes with the new row displayed.



6. The **Effective Date** field defaults to the current system date. Update this date to the applicable date using the **Calendar** icon as needed. This date will be the date the performance rating was discussed and signed off with the employee. (on or before mid-November)
7. Click the **Rating Type** drop down. Select the applicable rating type (Annual, Certification, Re-Evaluation).
8. Click the **Rating Cycle** icon. Select the applicable rating cycle based on the annual process completed by DHRM.
9. Click the **Rating** icon. Select the applicable rating given to the employee.

   Note: If the employee received a performance rating of "**B – Below Contributor**" or "**L- Employee on Leave or Not Rated**", proceed to Step 10. When the employee returns from leave repeat these steps to add a row and update the rating accordingly.

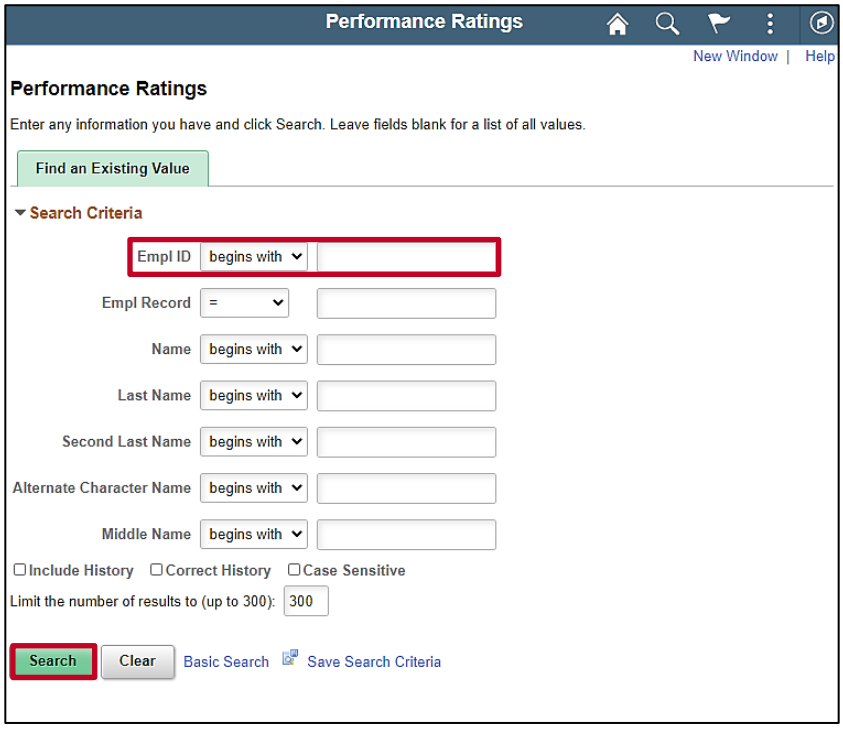
   Note: If the employee received a performance rating of "**X – Extraordinary**", the agency may document the receipt of the notice of extraordinary contributor in the **Comments** field. Attachments are not part of the functionality. Those documents will remain in the employee personnel file.
10. The **Supervisor** field is read-only, and defaults based on the employee's position.
11. The **Reviewer** field is read-only, and defaults based on supervisor's position.
12. Select the applicable re-evaluation status using the **Re-Evaluation Status** field drop down button and re-evaluation date using the **Re-Evaluation Date Calendar** icon. Leave these fields blank if the employee did not receive a "**B – Below Contributor**" performance rating.
13. Click the **Save** button.

Recording the Re-Evaluation Status for a Below Contributor

1. Navigate to the **Performance Ratings** page using the following path:

   Navigator > Workforce Development > Performance Management > Performance Ratings

The **Performance Rating Search** page displays.



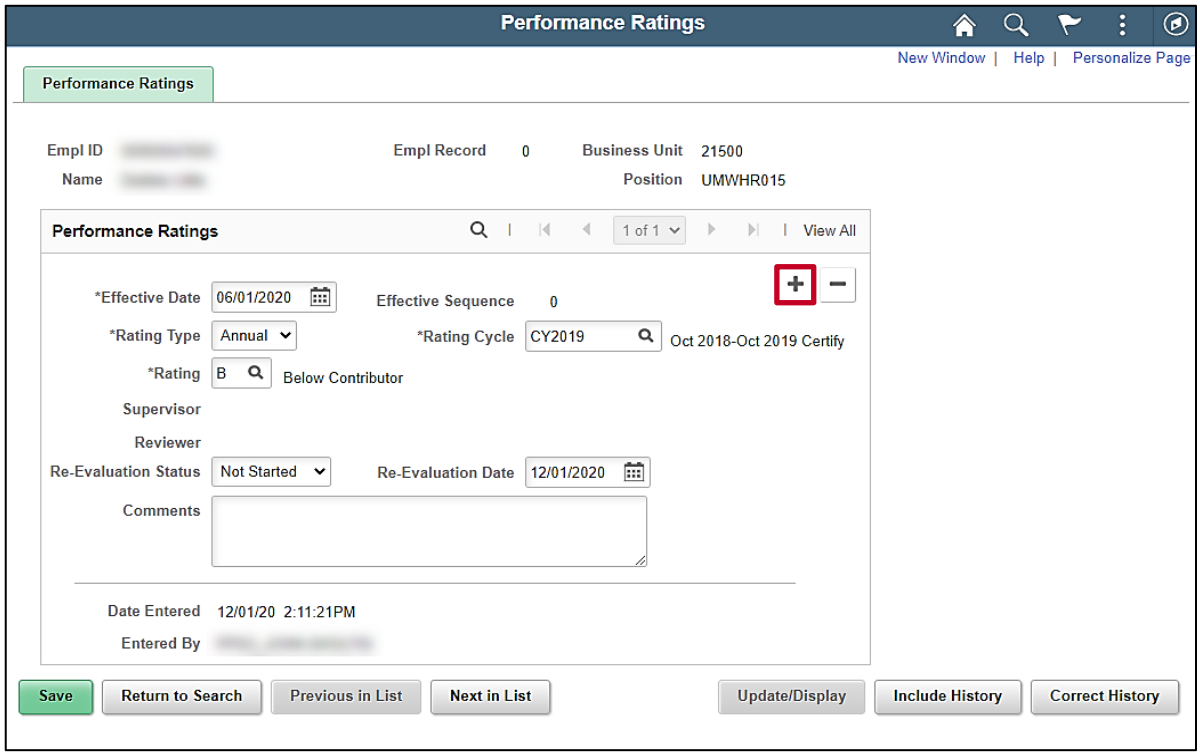
2. Enter the employee's Employee ID in the **Empl ID** field.

3. Click the **Search** button.

   Note: You can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. For further information and tips and tricks on searching for employees, reference the WBT titled **NAV205_Navigation in Cardinal HCM**. This WBT can be found on the Cardinal website under **Learning**.

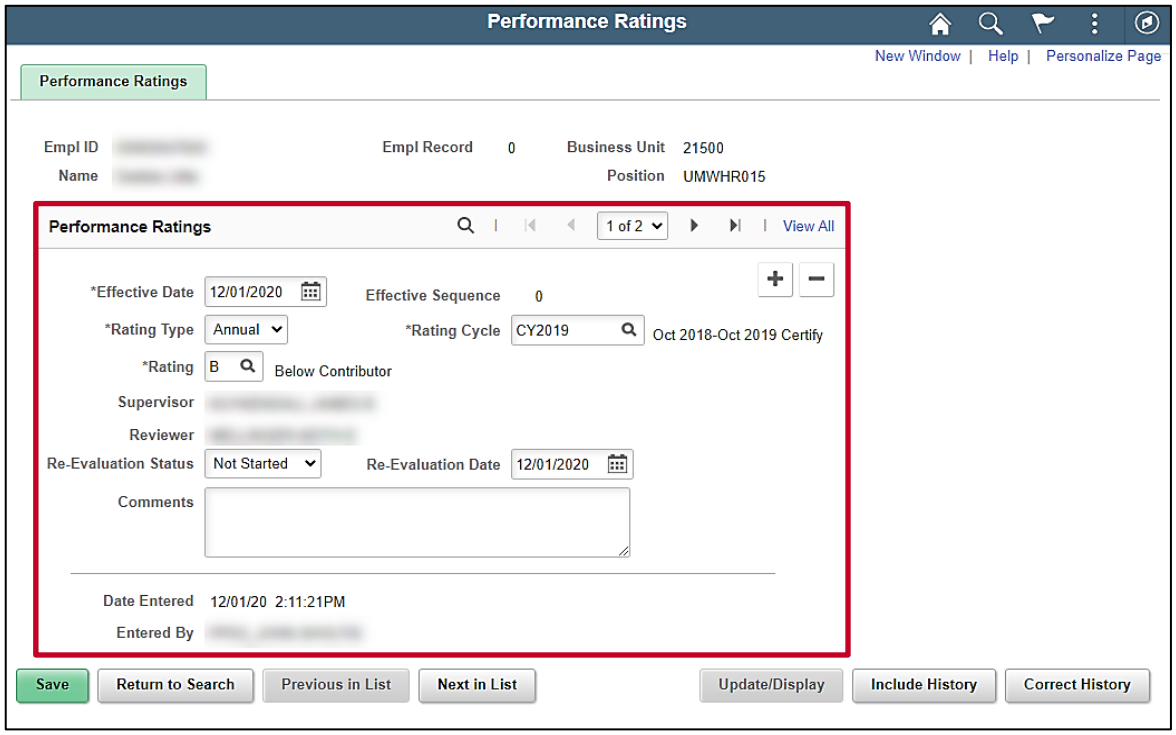
   Note: Cardinal security settings only allow users to view employees within their Agency.

The **Performance Ratings** page displays.



4. Click the **Add a New Row** icon (**+**) to add a new effective dated row.

The **Performance Ratings** page refreshes with the new effective row displayed.



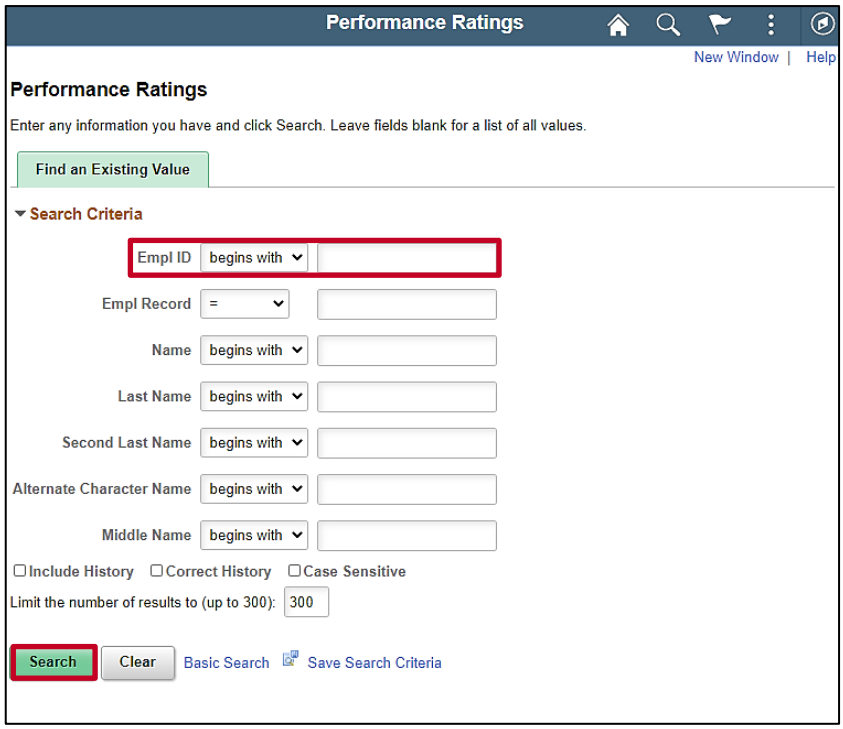
5. The **Effective Date** field defaults to the current system date. Update this date to the applicable date using the **Calendar** icon as needed.
6. The **Rating Type**, **Rating Cycle**, and **Rating** fields all default based on the previous row and should not be updated.
7. The **Supervisor** field is read-only and defaults based on the employee's position.
8. The **Reviewer** field is read-only and defaults based on supervisor's position.
9. Select the applicable re-evaluation status using the **Re-Evaluation Status** field drop down button.
10. Select the applicable re-evaluation date using the **Re-Evaluation Date Calendar** icon.
11. Click the **Save** button.

Recording the "L" Rating for an Employee on Leave During the Performance Rating Cycle

1. Navigate to the **Performance Ratings** page using the following path:

   Navigator > Workforce Development > Performance Management > Performance Ratings

The **Performance Rating Search** page displays.



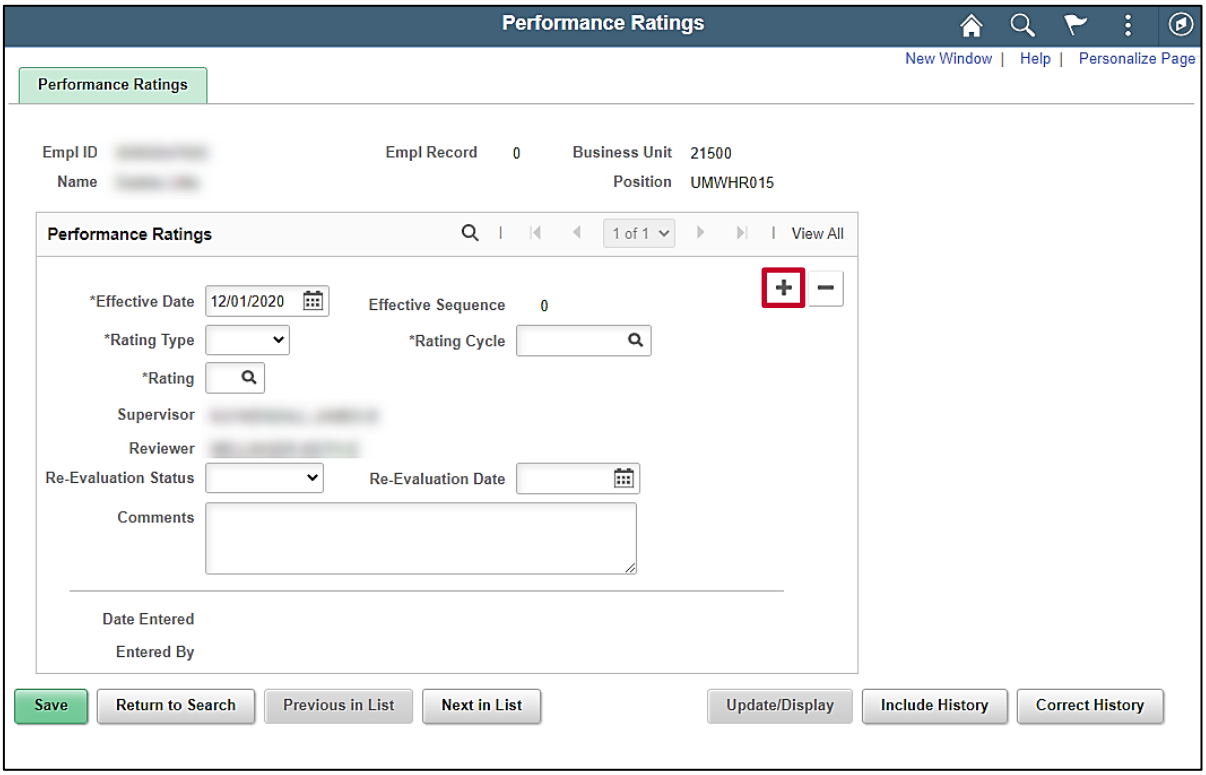
2. Enter the employee's Employee ID in the **Empl ID** field.

3. Click the **Search** button.

   Note: You can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. For further information and tips and tricks on searching for employees, reference the WBT titled **NAV205_Navigation in Cardinal HCM**. This WBT can be found on the Cardinal website under **Learning**.

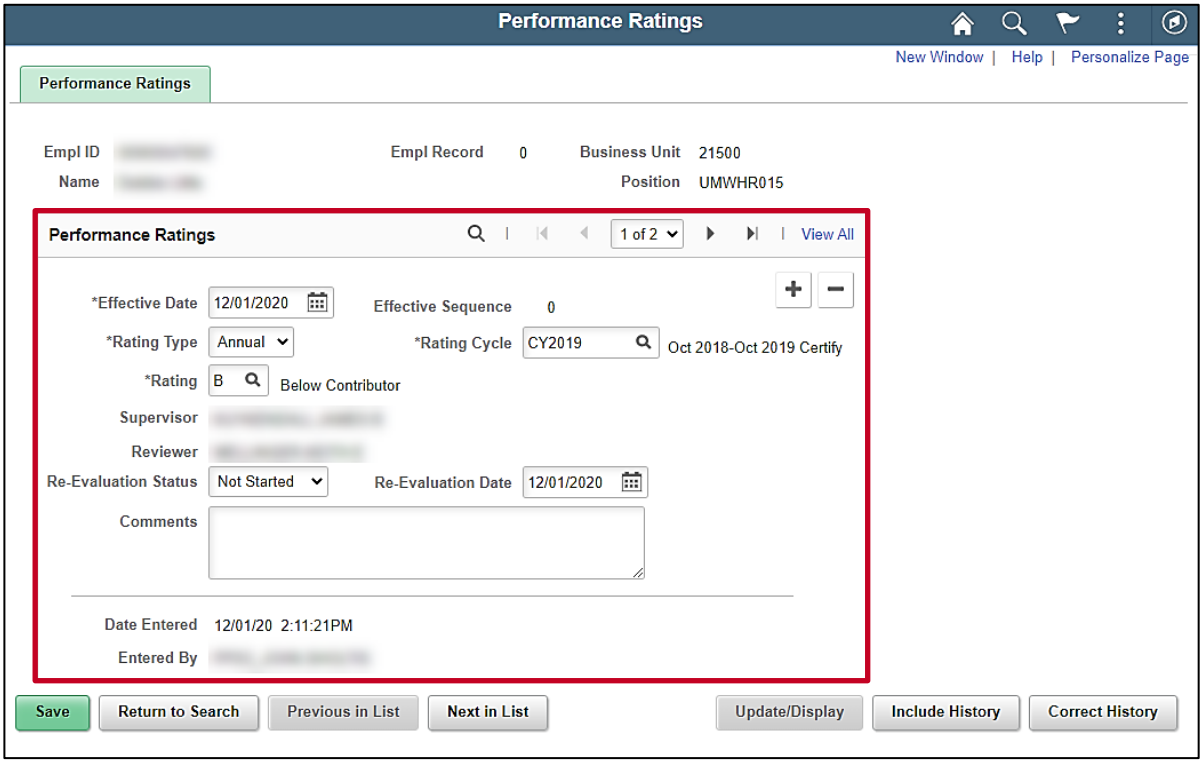
   Note: Cardinal security settings only allow users to view employees within their Agency.

The **Performance Ratings** page displays.



4. Click the **Add a New Row** icon (**+**) to add a new effective dated row.

The **Performance Ratings** page refreshes with the new effective row displayed.



5. The **Effective Date** field defaults to the current system date. Update this date to the applicable date using the **Calendar** icon as needed. Enter the end of the period for the effective date.
6. The **Rating Type** and **Rating Cycle** both default based on the previous row and should not be updated when completing this process.
7. Click the Rating Look Up icon and select the value of “L – Employee on Leave or Not Rated”.
8. The **Supervisor** field is read-only and defaults based on the employee’s position.
9. The **Reviewer** field is read-only and defaults based on supervisor’s position.
10. Select the applicable re-evaluation status using the **Re-Evaluation Status** field drop-down button.
11. Select the applicable re-evaluation date using the **Re-Evaluation Date Calendar** icon.
12. Click the **Save** button.

    Note: When the employee returns from leave and the performance rating is completed, repeat these steps to add a row and update the rating accordingly.