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 collected annually and entered for all VPA employees.

During the annual performance rating cycle, Agency HR will 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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Revision History

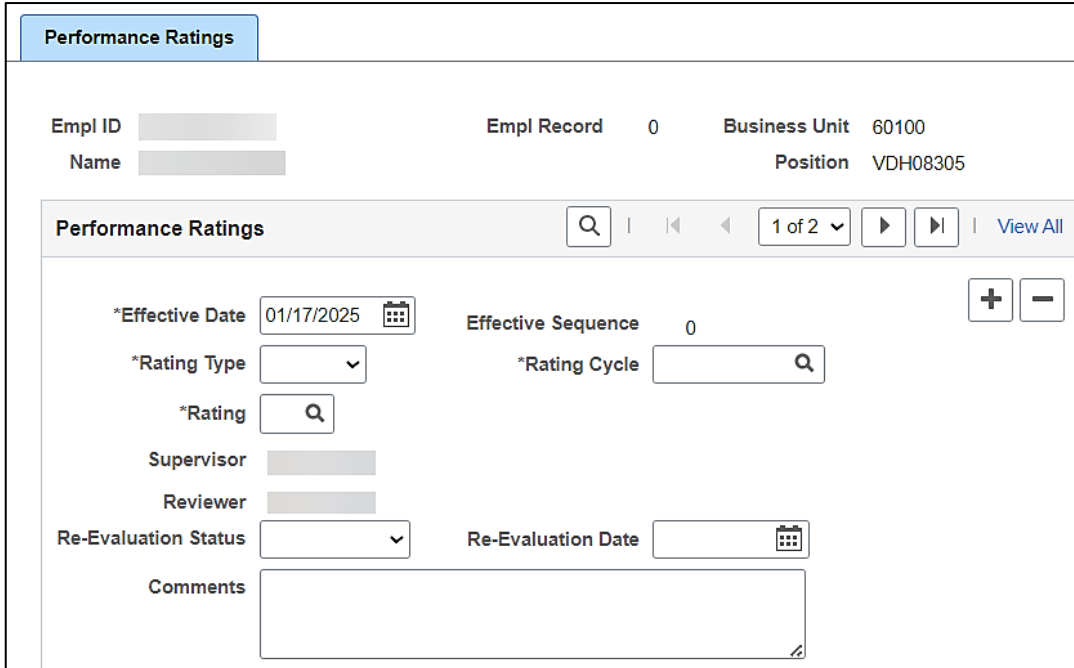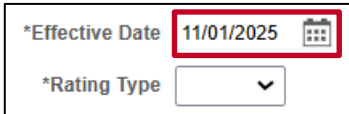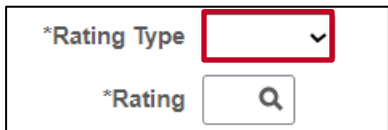| Revision Date	Summary of Changes
4/17/2025	Added a new section titled How to Correct an Employee's Performance Rating Cycle.
3/1/2025	Updated the screenshots of the Search pages (Section 1; after Step 1; Section 2, after Step 1; Section 3, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

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

Step	Action
1.	Navigate to the **Performance Ratings** page using the following path: **NavBar > Menu > Workforce Development > Performance Management > Performance Ratings**
	The **Performance Ratings Find an Existing Value** page displays.
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]
4.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]

The **Performance Ratings** page for the employee displays.

Performance Ratings

Empl ID		Empl Record	0	Business Unit	60100
Name				Position	VDH08305

Performance Ratings 🔍 |◀ ◀ 1 of 1 ▼ ▶ ▶| View All

*Effective Date 01/17/2025 📅 Effective Sequence 0

*Rating Type [▼] *Rating Cycle [🔍]

*Rating [🔍]

Supervisor

Reviewer

Re-Evaluation Status [▼] Re-Evaluation Date [📅]

Comments

Date Entered

Entered By

[Save] [Return to Search] [Update/Display]

Step	Action
5.	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 6. [**+**] [**–**]

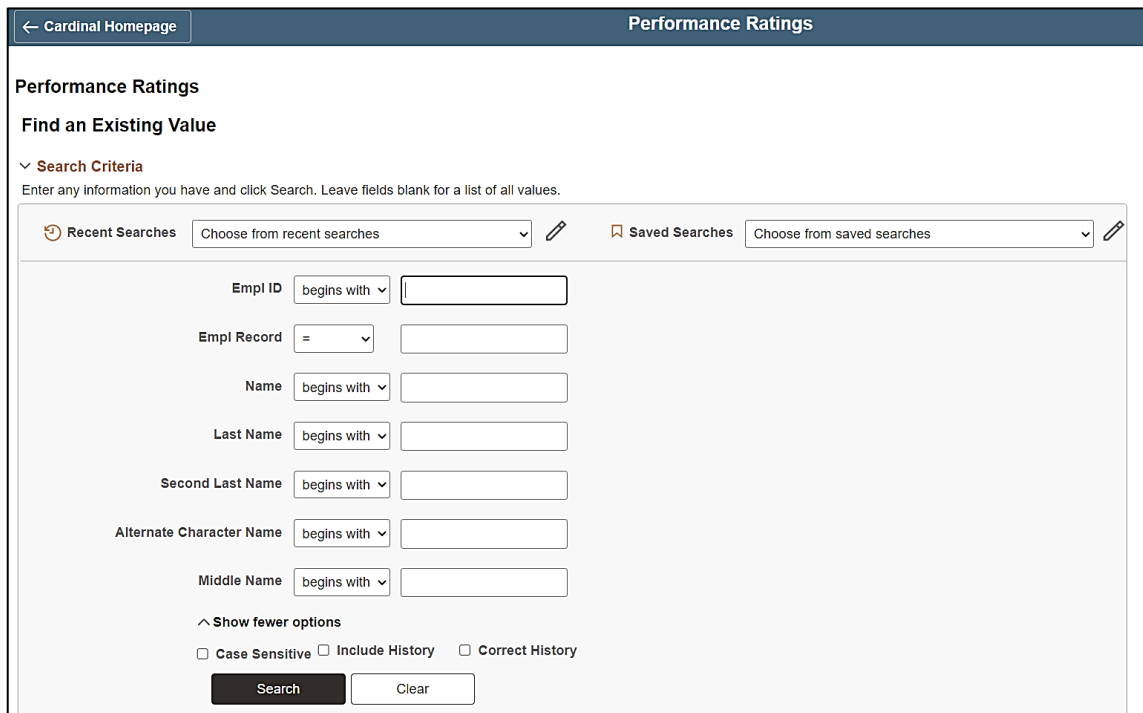| Step	Action
	The **Performance Ratings** page refreshes with the new effective dated row displayed. **Performance Ratings** Empl ID ▭ Empl Record 0 Business Unit 60100 Name ▭ Position VDH08305 **Performance Ratings** 🔍 ｜ ◁ ◁ 1 of 2 ▽ ▶ ▶｜ ｜ View All *Effective Date 01/17/2025 📅 Effective Sequence 0 ➕ ➖ *Rating Type ▽ *Rating Cycle 🔍 *Rating 🔍 Supervisor ▭ Reviewer ▭ Re-Evaluation Status ▽ Re-Evaluation Date 📅 Comments ▭
ℹ️	When a new row is created, the row count increases by one and the effective date defaults to the current date.
6.	Update the effective date to the applicable date using the **Effective Date Calendar** icon. **Note**: This date will be the date the performance rating was discussed and signed off with the employee (on or before mid-November). *Effective Date 11/01/2025 📅 *Rating Type ▽
7.	Click the **Rating Type** dropdown button and select the applicable rating type ("Annual", "Certification", or "Re-Evaluation"). *Rating Type ▽ *Rating 🔍

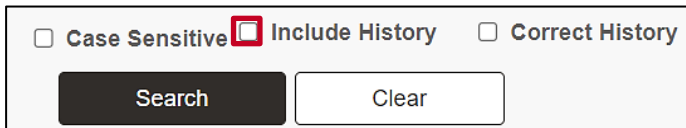| Step	Action
8.	Click the **Rating Cycle** lookup icon and select the applicable rating cycle based on the annual process completed by DHRM. Effective Sequence 0 *Rating Cycle [🔍]
9.	Click the **Rating** lookup icon and select the applicable rating given the employee. **Note**: Rating choices are "C – Contributor", "B – Below Contributor", "X – Extraordinary", or "L – Employee on Leave or Not Rated" **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. *Rating Type [⌄] *Rating [🔍]
ℹ️	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 available in Cardinal. Those documents will remain in the employee personnel file. *Rating [X 🔍] Extraordinary Supervisor DOE, JOHN Reviewer DOE, JOHN Re-Evaluation Status [⌄] Re-Evaluation Date [📅] Comments [ ]
ℹ️	The **Supervisor** and **Reviewer** fields are read-only and default based on the employee's position and the supervisor's position. *Rating [X 🔍] Extraordinary Supervisor DOE, JOHN Reviewer DOE, JOHN Re-Evaluation Status [⌄] Re-Evaluation Date [📅] Comments [ ]

Step	Action
10.	Select the applicable re-evaluation status using the **Re-Evaluation Status** field dropdown button and re-evaluation date using the **Re-Evaluation Date Calendar** icon. **Note**: Leave these fields blank if the employee did not receive a "B – Below Contributor" performance rating. *Rating [X Q] Extraordinary Supervisor DOE, JOHN Reviewer DOE, JOHN Re-Evaluation Status [⌄] Re-Evaluation Date [📅] Comments [ ]
11.	Click the **Save** button. [Save] [Return to Search] [Previous in List] [Next in List]

Recording the Re-Evaluation Status for a Below Contributor

Step	Action
1.	Navigate to the **Performance Ratings** page using the following path: **NavBar > Menu > Workforce Development > Performance Management > Performance Ratings**

The **Performance Ratings Find an Existing Value** page displays.

(i)	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Include History** checkbox.

Step	Action
4.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]
	The **Performance Ratings** page for the employee displays. **Performance Ratings** Empl ID ⬜ Empl Record 0 Business Unit 14000 Name ⬜ Position CJSTRN01 **Performance Ratings** 🔍 | ◁◁ ◁ 1 of 1 ▾ ▷ ▷▷ | View All *Effective Date 10/15/2024 📅 Effective Sequence 0 [+] [−] *Rating Type Annual ▾ *Rating Cycle PYOCT2023 🔍 PF YR 10/25/2022 - 10/24/2023 *Rating B 🔍 Below Contributor Supervisor ⬜ Reviewer ⬜ Re-Evaluation Status Not Started ▾ Re-Evaluation Date 01/15/2025 📅 Comments ⬜ Date Entered Entered By [Save] [Return to Search]
5.	Click the **Add a New Row** icon (**+**) to add a new effective dated row. [+] [−]

Step	Action
	The **Performance Ratings** page refreshes with the new effective dated row displayed.
ℹ️	When a new row is created, the row count increases by one and the effective date displays the current date.
6.	Update the effective date to the applicable date using the **Effective Date Calendar** icon. **Note**: This date will be the date the performance rating was discussed and signed off with the employee.
ℹ️	The **Rating Type, Rating Cycle**, and **Rating** fields all default based on the previous row and should not be updated.

Step	Action
ℹ️	The **Supervisor** and **Reviewer** fields are read-only and default based on the employee's position and the supervisor's position. *Rating [B 🔍] Below Contributor* **Supervisor** **Reviewer** Re-Evaluation Status [▾] Re-Evaluation Date [📅] Comments [_____]
7.	Click the **Re-Evaluation Status** dropdown button and select the applicable re-evaluation status. Re-Evaluation Status [▾] Re-Evaluation Date [📅]
8.	Click the **Re-Evaluation Date Calendar** icon and select the applicable re-evaluation date. Re-Evaluation Status [▾] Re-Evaluation Date [📅]
9.	Click the **Save** button. [Save] [Return to Search] [Previous in List] [Next in List]

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

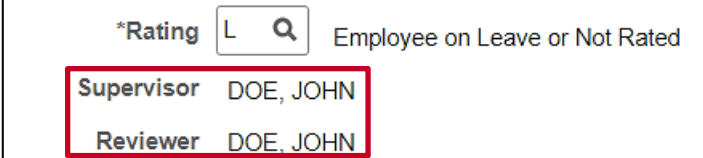| Step	Action
1.	Navigate to the **Performance Ratings** page using the following path: **NavBar > Menu > Workforce Development > Performance Management > Performance Ratings**
	The **Performance Ratings Find an Existing Value** page displays.
ℹ️	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History Search Clear
4.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History Search Clear

The **Performance Ratings** page for the employee displays.

Performance Ratings

| Empl ID | | Empl Record | 0 | Business Unit | 14000 |
| Name | | | | Position | CJSTRN01 |

Performance Ratings   🔍   I ⏮ ◀ 1 of 1 ▾ ▶ ⏭ I View All

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*Effective Date 01/21/2025 📅   Effective Sequence 0

*Rating Type ▾   *Rating Cycle 🔍

*Rating 🔍

Supervisor

Reviewer

Re-Evaluation Status ▾   Re-Evaluation Date 📅

Comments

Date Entered

Entered By

Save   Return to Search

Step	Action
5.	Click the **Add a New Row** icon (**+**) to add a new effective dated row. ＋ －

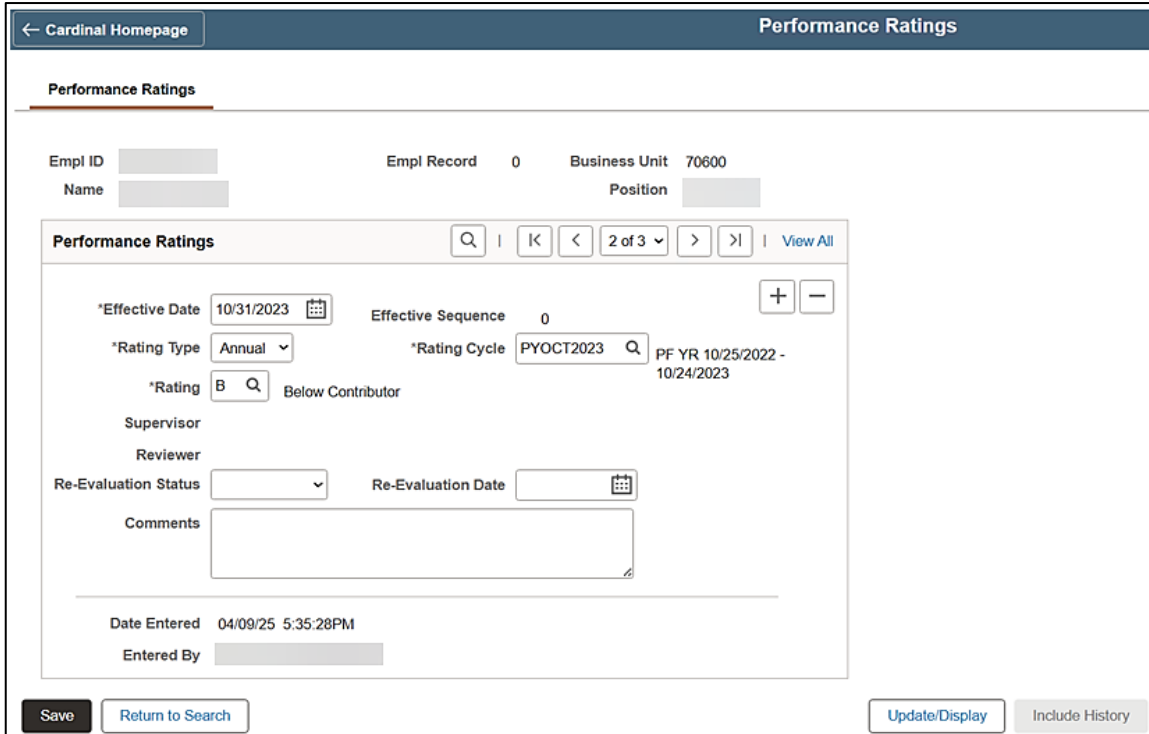| Step	Action
	The **Performance Ratings** page refreshes with the new effective dated row displayed. ![Performance Ratings page screenshot showing Performance Ratings tab. Empl ID, Name, Empl Record 0, Business Unit 14000, Position CJSTRN01. Performance Ratings section showing 2 of 2, View All. *Effective Date 01/21/2025, Effective Sequence 0. *Rating Type Annual, *Rating Cycle PYOCT2023 PF YR 10/25/2022 - 10/24/2023. *Rating C Contributor. Supervisor, Reviewer, Re-Evaluation Status, Re-Evaluation Date, Comments. Date Entered, Entered By. Save and Return to Search buttons.]
ℹ	When a new row is created, the row count increases by one and the effective date displays the current date.
ℹ	The **Rating Type** and **Rating Cycle** fields default based on the previous row and should not be updated. *Rating Type [Annual] *Rating Cycle [PYOCT2023]
6.	Update the effective date to the applicable date using the **Effective Date Calendar** icon. Enter the end of the period for the effective date. *Effective Date [01/21/2025] *Rating Type [Annual]

Step	Action
7.	Click the **Rating** lookup icon and select the value of "L – Employee on Leave or Not Rated". *Rating [L 🔍] Employee on Leave or Not Rated
ℹ️	The **Supervisor** and **Reviewer** fields are read-only and default based on the employee's position and the supervisor's position. *Rating [L 🔍] Employee on Leave or Not Rated Supervisor DOE, JOHN Reviewer DOE, JOHN
7.	Click the **Re-Evaluation Status** dropdown button and select the applicable re-evaluation status. Re-Evaluation Status [Not Started ⌄]　Re-Evaluation Date [　　🗓]
8.	Click the **Re-Evaluation Date** calendar icon and select the applicable re-evaluation date. Re-Evaluation Status [Not Started ⌄]　Re-Evaluation Date [11/24/2025 🗓]
9.	Click the **Save** button. [Save]　[Return to Search]　[Previous in List]　[Next in List]
ℹ️	When the employee returns from leave and the performance rating is completed, repeat these steps to add a row and update the rating accordingly.

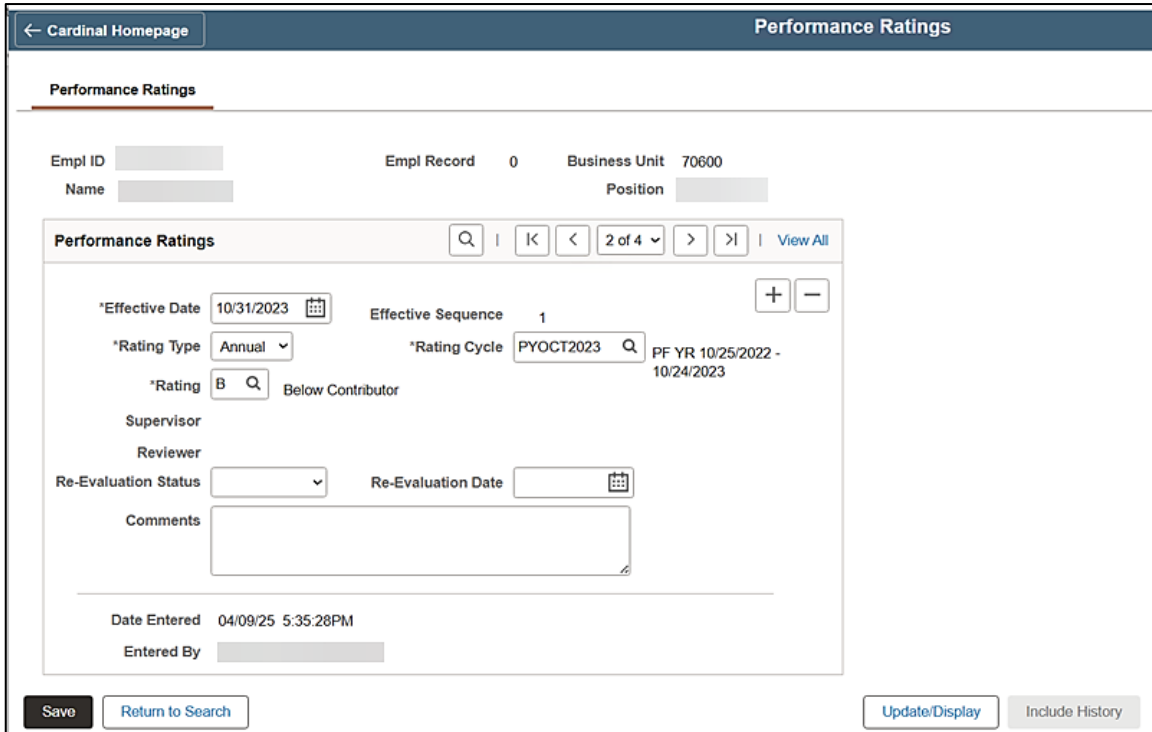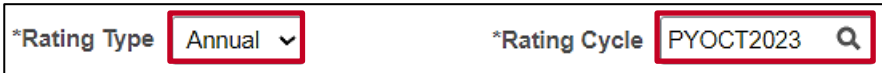## How to Correct an Employee's Performance Rating Cycle

Step	Action
1.	Navigate to the **Performance Ratings** page using the following path: **NavBar > Menu > Workforce Development > Performance Management > Performance Ratings**
	The **Performance Ratings Find an Existing Value** page displays.
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Include History** checkbox.

Step	Action
4.	Click the **Search** button.

The **Performance Ratings** page for the employee displays.

Step	Action
5.	Click the **Dropdown** button or use the Navigation Arrows to navigate to the row that needs to be corrected.

Step	Action
	The **Performance Ratings** page refreshes with the desired effective dated row displayed.
6	Click the **Add a New Row** icon (**+**) to add a new effective dated row.

Step	Action
	The **Performance Ratings** page refreshes with a new effective dated row.
(i)	When a new row is created, the row count increases by one and the effective date displays the same effective date. The Effective Sequence is increased by one.
(i)	The **Rating Type** and **Rating Cycle** fields default based on the previous row and should not be updated.
7.	Click the **Rating** lookup icon and select the corrected rating.
8.	Click the **Save** button.