



September 13, 2004

**OKLAHOMA BULLETIN NO. OK360-4-25**

**SUBJECT: PER - Performance Appraisal for Fiscal Year 2004**

**Purpose:** To provide instructions for completing the Performance Appraisal Summary Rating process in Internet Combined Administrative Management System (ICAMS).

**Expiration Date:** December 31, 2004

**ACTION REQUIRED BY: October 25, 2004**

For Fiscal Year 2004, supervisors will enter each employee's Summary Rating into ICAMS. A performance work plan must be in place for the minimum appraisal period (a minimum of 90 calendar days), and normally, no longer than 15 months, for a summary rating to be conducted. Normally, the summary rating is issued at the end of the fiscal year, September 30. For additional information reference the General Manual, Title 360, Part 409, Performance Management.

The following instructions are provided to assist in this process.

**Supervisor Instructions**

- Step 1:** Open Internet Explorer and type <https://icams.usda.gov> in the address and hit enter
- Step 2:** Enter your User ID and password and click on Sign In
- Step 3:** Click on "Manager Self Service"
- Step 4:** Click on "Tasks"
- Step 5:** Click on "Performance"
- Step 6:** Click on "Summary Rating"
- Step 7:** Click on "New Rating" for the employee whom you are doing a summary rating. Only 10 employees are listed at a time. To view additional employees click on "View All"
- Step 8:** At the "Add a New Value" enter the **Plan Start Date**.  
Use the lookup icon  to choose the start date of the performance plan. Then click "Add". This will bring up the Employee Appraisal Worksheet.
- Step 9:** There are two methods to assign a summary rating.

**Method 1:** On the Summary Rating tab next to "Overall Rating", use the lookup icon  to choose the overall rating. If you enter "3" Results Achieved, this will automatically assign a Results Achieved rating to all elements. You can enter comments in the "Reviewer Comments" block. Then click the save button.

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**Method 2:** If the employee's performance does not warrant a "Results Achieved" on all elements, you will need to enter a rating for each element. To do this you will click on the "Elements and Standards" tab. This will bring up the first element and standard. To see all the elements and standards click, on "View All". You can then assign a rating to each individual element. After a rating has been assigned to all elements, you will go back to the Summary Rating tab and assign an overall rating. You may enter comments in the "Reviewer Comments" block and click the "Save" button.

**Reminder: Under the pass/fail appraisal system, an element rated as "Results Not Achieved" requires the Summary Rating of "Results Not Achieved". Employees who receive a Results Not Achieved rating must be placed on an Opportunity to Improve (OTI). The Human Resources staff should be notified of any employee placed on an OTI.**

**Step 10:** Once the supervisor has completed the rating, the appraisal will appear in the employee's work list, and the employee will receive an e-mail notifying them of this action.

**Step 11:** The employee needs to log on to ICAMS and view the comments and enter any comments of their own.

Supervisors do not need to do performance appraisals for students who are working during the school year. Supervisors will complete a Performance Evaluation form before students report to their summer duty station.

**Reminder to Supervisors:** Employees who were hired after July 1, 2004, will have their rating period extended to meet the 90-day minimum rating period requirement. At the end of the 90 days, the supervisor can process a summary rating for FY2004. Then Performance Plan for FY2005 can be setup in I\*CAMS.

### **Employee Instructions**

**Employees should follow these steps to review their Performance Appraisal after the Supervisor has completed their summary rating in ICAMS.**

**Step 1:** Start Internet Explorer and go to: <https://icams.usda.gov>

**Step 2:** Enter your Login ID and password and click on Log In

**Step 3:** Click on **Worklist**

**Step 4:** Click on Worklist link "[Supervisor did your Rating](#)".

**Step 5:** Review Supervisor comments.

**Step 6:** Enter comments in the Employee Comment box, (i.e., "I reviewed my appraisal on 10/7/04.")

**Step 7:** Click "Save". Clicking on "Save" generates an electronic signature and finalizes the appraisal.

**To print the Performance Appraisal:**

**Step 1:** Click on 

**Step 2:** When it stops processing click on [View Document](#).

**Step 3:** The Performance appraisal will be displayed as a PDF file. Print a copy by using the toolbar printer icon.

The Human Resources staff is no longer required to maintain Employee Performance Files. Therefore, **it is not necessary for supervisors to send hard copies of the Performance Appraisal to the state office.** The official Performance Appraisal will be maintained in ICAMS. It is recommended that supervisors keep a copy in the employee's file maintained in their office.

**Supervisors and employees must complete the Performance Ratings by October 25, 2004.**

Oklahoma Bulletin 360-4-24 will provide instructions for establishing Performance Work Plans for FY2005 in ICAMS. Questions concerning this bulletin may be directed to Linda Garabedian, Human Resources Specialist, Human Resources Staff, at (405) 742-1210.

/s/ John Glover, acting for

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State Conservationist