

Oracle Fusion Cloud Talent Management

**How do I calibrate performance
document ratings using Workforce
Compensation?**



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G43717-01

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1 Introduction

Performance calibration is a common process used mainly by organizations to discuss the performance of workers among managers and achieve a common agreement on performance evaluation rating. It focuses on performance within a given period of time.

Typically, the evaluation and calibration process is as follows:

- Managers evaluate each employee's overall performance or section ratings. The rating isn't shared with employees, as it's not the final rating.
- Managers and HR specialist calibrate the performance ratings before making them visible to employees.
- While calibrating, managers ensure they meet the company's recommended performance rating distribution.
- Post calibration, overall performance ratings are updated to reflect calibration outcome.

This playbook describes how to achieve performance calibration through Oracle Fusion Performance Management and restricted usage of Oracle Fusion Cloud Workforce Compensation.

2 Roles and Tasks Involved in Calibration

The table below lists the roles and tasks involved in calibrating performance document ratings.

Role	Where	Tasks
HR Administrator	My Client Groups > Performance	• <i>Step 1: Configure Performance Process Flows</i> • <i>Step 2: Configure Performance Template</i> • <i>Step 3: Enable Manager share task (after calibration)</i>
Manager	My Team > Performance	• <i>Step 4: Manager Evaluates Workers</i>
Compensation Administrator	My Client Groups > Compensation Management	• <i>Step 5: Configure Compensation Plan</i> • <i>Step 6: Set Up Rating Distribution Chart</i> • <i>Step 7: Enable Audit Trail</i> • <i>Step 8: Run Refresh Data Process</i>

Step 1: Configure Performance Process Flow

HR administrators need to configure the performance process flow settings to prevent managers from completing the Share Performance Document task and sharing their ratings and comments with employees.

1. Go to **My Client Groups > Performance > Performance Process Flows**.
2. Enable the **Allow document sharing task to be locked for calibration** check box.
Alternatively, if you've enabled the ORA_HRA_COMP_CALIBRATION_STATUS_ENABLED profile option then **Allow document sharing task to be locked for calibration** isn't available for use. Instead, you can use compensation statuses to lock performance documents.

Step 2: Configure Performance Template

HR administrators need to enable the Lock Manager Share Task option for a document period in a performance template using the process flow.

1. Go to **My Client Groups > Performance > Performance Templates**.
2. In the Document Periods step, select Lock Manager Share Task. When enabled for any performance document created using this document period, managers won't be able to complete the Share Document task.

3. When the calibration period is over, HR administrators can deselect Lock Manager Share Task so that managers can complete the share task as usual.
If you've enabled the `ORA_HRA_COMP_CALIBRATION_STATUS_ENABLED` profile option then the Lock Manager Task isn't available in the Document Periods step of the performance template.

Step 3: Evaluate Workers

Managers use the Manager Evaluation task in **My Team > Career and Performance > Evaluate Performance** and enter ratings and comments, and when complete submit the document.

During the evaluation process if HR administrators lock the Share Performance Documents task, then managers see a message that they can't share just yet because the performance document is locked for calibration.

If using statuses from Compensation for calibration if the task is Manager Evaluation and the calibration status for the employee is either In Review or Complete, then managers see a message that section ratings in the performance document are locked. Managers can still adjust comments and item ratings in the performance document to align with the calibrated ratings.

If the manager task is Share Performance Documents and the calibration status has been set to In Review, the manager won't be able to complete the share task. After the calibration status is set to Complete, the manager can continue sharing their evaluation with the employee.

Step 4: Create a Compensation Plan in Compensation Management

Compensation administrators need to create a new compensation plan which should be linked with performance ratings and performance documents.

Only the steps related to performance ratings and properties are listed here. For detailed steps, see Compensation documentation.

1. Go to **My Client Groups > Compensation > Workforce Compensation Plans**.
2. Click **Create** and configure plan details and budgets as required.
3. In the Configure Worksheets section, configure Performance Ratings as follows:
 - a. Set Enable Performance Ratings to **Yes**.
 - b. Set Performance Rating to Use as **Integrate with Oracle Performance Management**.
4. In the Performance Document Properties section, configure these settings.
 - a. Select the applicable performance template for performance calibration.
 - b. Select the evaluation status as required.
 - c. If you selected the performance template previously, the document type is automatically updated.
 - d. Select the period for the performance document. Note, a performance review period can also be selected to restrict ratings to one period, if needed.
5. In the Test Performance Document section, select a worker and one assignment of the worker and click **Test**.

6. Click **Next** to configure approvals, worksheet display, and complete the setup.

The configured compensation plan is designed to pull in performance ratings from the current performance document to the Workforce Compensation work area. Senior managers and HR can review the rating entries of their managers and can see a summary table of the ratings submitted and the target rating distribution.

Step 5: Set Up Rating Distribution Chart

Compensation administrators can also set up target rating distributions in the rating model definition. These are used in charts in the compensation plan to check the submitted ratings and meet the target rating distribution set by the organization.

In order to meet the rating distributions, the team can review the rating distribution graph and adjust the ratings as required in the worksheet. This analytic will update in real-time as performance ratings are adjusted in the worksheet. When you make changes in the Performance Management Overall Rating column and save, the application automatically overrides the rating for those workers in the performance document.

Managers can edit the submitted manager evaluations in order to adjust their comments in the performance document to reflect any changed ratings. Additionally, managers can add notes and attach documents for each worker to support the rating or the adjustment. These notes will later be referred at any time in the worksheet.

Step 6: View Audit Trail

Compensation administrators can view the changes made to performance ratings in an audit trail, if **Include in audit trail** option is selected in the rating column.

You can view the changes in an audit trail, if enabled. The audit trail shows original and new values for each worker.

Step 7: Enable Manager Share Task

After calibration, HR administrators need to deselect the **Allow document sharing task to be locked for calibration** in the process flow to enable the Share Performance Document task for managers.

This allows managers to share the performance document after ratings have been calibrated with employees.

Step 8: Refresh Data for Ongoing Calibration Plan

To refresh data in compensation plans with changed HR data, sign in as a compensation administrator and run the batch process.

1. Go to **My Client Groups > Compensation > Workforce Compensation > Run Batch Processes**.
2. Click **Refresh Workforce Compensation Data** and select the performance calibration plan, the cycle, and the refresh date.

3. In Refresh Options, select **Full Refresh**.
4. Submit the process.

3 Considerations for Performance Document Ratings

Here are some things to note about performance document calibration:

Here's what to do

- If your organization uses more than one performance document template, leaving the performance template selection blank allows for the latest evaluation document for each worker to be picked up.
- The process only allows calibration for sections that have Enable Manual Section Rating enabled in the performance template.
- Any change to the performance document properties in setup immediately reflects in the plan without having to run any refresh. This also means that ratings shown in worksheet can also change if the properties are changed.

