# **Annual Appraisal Overview for Rating Official**

The supervisor will evaluate employee performance by assessing performance against the elements and standards in the employee's approved performance plan and assigning a rating of record based on work performed during the appraisal cycle. A written rating of record must be provided at the end of the appraisal cycle for each employee who has been under an approved performance plan for 90 calendar days during the cycle.

Employee input, while not mandatory, is highly encouraged and valuable for end of the appraisal cycle where the employee input becomes a part of the employee performance file. The absence of employee input does not relieve the supervisor of the responsibility for writing a narrative statement accessing the employee's performance standards and contributions. Supervisors will write a performance narrative that succinctly addresses the employee's performance measured against the performance standards for the appraisal cycle.

The performance narrative justifies how an employee's ratings are determined and provides support for recognition and rewards (or any administrative or adverse action, if necessary).

The supervisor will assign an individual performance element rating of 5, 3, or 1 to each critical element. All performance element ratings are averaged to calculate the rating of record, which reflects the employee's overall job performance during the appraisal cycle based on the rating criteria outlined in Table 1.

Performance narratives are required for each element rated '5' Outstanding and '1' Unacceptable.

Rating Level	Rating Criteria
Level 5 - Outstanding	The average score of all critical element performance
	ratings is 4.3 or greater, with no critical element being
	rated a '1' (Unacceptable), resulting in a rating of record
	that is a '5'
Level 3 – Fully Successful	The average score of all critical element performance
	ratings is less than 4.3, with no critical element being
	rated a '1' (Unacceptable), resulting in a rating of record
	that is a '3'
Level 1 – Unacceptable	Any critical element rated as '1'

#### Table 1 – Rating Level and Criteria

# When is an Annual Appraisal Prepared?

A written rating of record must be provided at the end of the appraisal cycle for each employee who has been under an approved performance plan for 90 calendar days during the cycle.

# Who Participates in an Annual Appraisal?

- A rating official can:
  - $\checkmark$  transfer ownership to the employee to provide inputs.
  - ✓ review the employee's input and prepare a performance narrative that succinctly addresses the employee's performance measured against the performance standards for the appraisal cycle.
  - ✓ assign an individual performance element rating of either 5, 3 or 1 to each critical element.
  - $\checkmark$  document approval and or communication of the annual appraisal to the employee.
- An employee can:
  - ✓ provide written input about performance accomplishments for supervisors to consider in evaluating each of the performance elements and overall performance accomplishments.
  - $\checkmark$  transfer ownership to the rating official to provide performance narratives.
  - ✓ review rating official performance narrative and acknowledge the annual appraisal.

# **Starting an Annual Appraisal**

#### **Steps to Start an Annual Appraisal**

1. On the *MyPerformance Main Page*, select the performance plan you want to start an annual appraisal for, make sure **Action** column reflects **Update** and select **Go** button. You must have ownership of the approved performance plan to make any changes. If you do not have ownership of the approved performance plan you can retrieve the plan by selecting Retrieve under Action column.

MyPerformance Main Page Prov	ide Guest Feedback									
Rating Official/Higher Level R	eviewer									
				MyPerforma	ance Main Page					
										Need Help?
		plication is designed for se on is a violation of law and			tion only. Do NOT ente	er classified in	nformation in th	nis system. Unautho	rized release of	
From the Main Page, you can create,	update and view employee Performa	ance Plans; change the Rating Offi	cial and/or Higher Level Re	viewer; view and print	part or an entire plan after it is o	created; close a	plan, and track the si	tatus of a plan.		
You can also search for completed pl	lans by selecting the 'Show Complete	ed Plans/Appraisals' link located at	the bottom of this page.							
To create a Performance Plan:	To complete other actions	s described above:								
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> </ul>		rom the Action column								
Select the 'Go' button	<ul> <li>Select the 'Go' but</li> </ul>	tton								
Important: To become familiar with t	he columns, select the 'Need Help?' I	link.								
Plans/Appraisals In Progress										
IP Only Employees that have a	plan in progress are listed below.									
Show Me All Appraisals	Appraisal Year ALL							-Choo	Create New Pl se a Plan Type	So Go
Records Displayed 10 💌   🐹	2 🗟 🕸									
Employee Name EHRIS Bwraox, Wzhjkuw G	Current Owner EHRIS Caaohu, Crdqdd I	Rating Official Name EHRIS Caaohu, Crdqdd I	Appraisal Year 2017	Appraisal ID 195	Plan Approval Date 25-Apr-2016	Type 🛆 DoD	Plan Status Approved	Current Status Progress Review Completed	Action Update	✓ Go
										-
Select the link to search for Complete	ed Plans.									
Show Completed Plans/Appraisals										

Figure 1 - MyPerformance Main Page>Starting Annual Appraisal

2. When a rating official has update capability (when **Action** column on *Main Page* reflects **Update**), the rating official must acknowledge (using **Acknowledge** button) that he or she has read and acknowledges his or her role and responsibilities during the appraisal period each time before working in MyPerformance.

Confirmation		
	Supervisory Commitment Statement	
	I acknowledge my role as a supervisor is vital in fostering a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals; establish open communication, monitor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	
		Acknowledge

Figure 2 - Supervisor Commitment Statement

3. The *Step 1: Plan Details* page is displayed as pictured below in Figure 3. Select the *Annual Appraisal* tab to start the annual appraisal. If you need to get out of the tool at this time, select the **Choose an Action** list of values (LOV) drop down arrow, select **Return to Main Page**, followed by **Go** button.

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Participants	
Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments	
	Choose an Action 🔽 Go
Employee Information	
Employee Name EHRIS Bwraox, Wzhjkuw G Show Employee Details	
This screen allows you to view and change the details of your employee's performance plan.	
Step 1: Plan Details	
<ul> <li>Verify the appraisal dates and higher level reviewer name is correct, and, if applicable, make the necessary changes.</li> <li>Select Save and Continue button at the bottom right corner to move to Step 2: Mission Goals.</li> </ul>	
TIP: Choose an Action – located at the top right corner – allows for selection of other actions throughout the performance cycle.	
For additional guidance, select Need Help?	
* Appraisal Type Annual Appraisal - DoD V Performance Plan Approval Date 25-Apr-2016	
Appreical Pariod Start Data 01-Apr-2016	
* Appraisal Period End Date 31-Mar-2017	
* Appraisal Effective Date 01-Jun-2017	
Rating Official Name EHRIS Caaohu, Crdqdd I Higher Level Reviewer EHRIS Cazfx, Duszaxwycpcok C	
Ligital Laval Navianal Entris Cazis, Subzastry Cover C	
	Save and <u>C</u> ontinue

Figure 3 – Plan>Step 1: Plan Details>Navigate to Annual Appraisal Tab

4. The Annual Appraisal page is displayed as pictured in Figure 4. There are three sub tabs on this page: Assessments and Ratings, Rating of Record, and Approvals and Acknowledgments.

riogro	ess Reviews	Annual Appraisal Narrative Statemen	nts View/Print Form Mana	age Guest Participants		
sessment	s and Ratir	ngs Rating of Record Approvals and Ack	knowledgments			
plovee In	formation				Choose an Action	<b>v</b>
ployee Na		RIS Bwraox, Wzhjkuw G Is				
						Need H
	to evaluate.	and the field of the state		essments and write your evaluations. Select the 'Ra	adio' button next to the performance eler	
you want t Appra		al Type Annual Appraisal - DoD re Date 01-Jun-2017	Appr	essments and write your evaluations. Select the 'Re aisal Period Start Date 01-Apr-2016 aisal Period End Date 31-Mar-2017	adio' button next to the performance eler	
you want t Appra Performa	Appraise Appraise aisal Effectiv ance Eleme	al Type Annual Appraisal - DoD re Date 01-Jun-2017	Appr	aisal Period Start Date 01-Apr-2016	adio' button next to the performance eler	
you want t Appra	Appraise Appraise aisal Effectiv ance Eleme	al Type Annual Appraisal - DoD re Date 01-Jun-2017	Appr	aisal Period Start Date 01-Apr-2016	adio' button next to the performance eler	
Appra Performa	Appraisa Appraisa aisal Effectiv ance Eleme	al Type Annual Appraisal - DoD re Date 01-Jun-2017	Аррг Аррі	aisal Period Start Date 01-Apr-2016 aisal Period End Date 31-Mar-2017		
Appra Performa Select	Appraise aisal Effectiv ance Eleme Order	al Type Annual Appraisal - DoD e Date 01-Jun-2017	Appr App Status	aisal Period Start Date 01-Apr-2016 31-Mar-2017 Performance Element Type	Rating	

Figure 4 – Annual Appraisal>Assessments and Ratings, Rating of Record, and Approvals and Acknowledgments Sub Tabs

5. Select the radio button next to the performance element and standards you want to enter your performance narrative and enter a performance element rating.

**NOTE**: If an employee does not have an opportunity to perform work associated with a performance element for 90 calendar days during the appraisal cycle, no performance element rating will be assigned for that performance element. An unratable performance element cannot be used as a factor in deriving a rating of record.

Progres	a Reviews	Annual Appraisal Nanative Statements	VewPrint Form Manag	e Guest Participants		
essments	and Rating	Rating of Record Approvals and Acknowle	odgments			
						- Choose an Action -
ployee Infi		( Derror Webber (				
how Emplo	oyee Details	S Beraox, Wahjkure G				
						New
This scree	en allows yo	u to view your employee's performance elements			idio' button next to the performance element and s	standard(x) you want to evaluate.
Appr	Appraisa aisai (Thect-	al Type Annual Apprainal - DoD e Date 01-Jun 2017	Appril	isal Period Start Date 01-Apr-2016 aisal Period End Date 31-Mar-2017		
Perform	ance Eleme					
n o I						
Select	Order	Performance Element Title	Status	Performance Element Type	Ruting	
	1	Performance Element 1	Approved	Ortical		
<u> </u>	2	Performance Element 2	Approved	Official		
0	3	Performance Element 3	Approved	Ortical		
Perform	ance Eleme	int and Standard(s)				
Employee	e Input					
Rating O	eticial Asse	samont				
	<b>.</b> .		77 1	41 - 14	^	
	Enter	performance narrative h	ere. You have	e a limit		
	of 200	0 characters.				
					~	
	to 2000 charao		_	Spell Check Co		
	to 2000 charac		7	Spell Check Co	~	
		nt Rating		Spell Check Co	rter	
			Ð	Spel Oteck Co	v nter	Go to bjert Performance Element Go Back to Top of
		et Rating	Ð	Spel Owerk Co	arter	(Go to bject Performance Element)   Go Back to Top of   Save and Gon

Figure 4 – Annual Appraisal>Assessments and Ratings>Narrative Statement and Element Rating

### Table 2 - Decision Table for Annual Appraisal

If You	Then
Want to go to the next performance element to enter your input	Select the <b>Go to Next Performance Element</b> button Go to Next Performance Element
Want to go back to the top of the page after you have finished with your input	Select <b>Go Back to Top of the Page</b> button Go Back to Top of Page
Want to go to Rating of Record sub tab	Select Save and Continue button Save and Continue

6. Select Rating of Record sub tab to review your rating of record. Ratings can be changed on this page by selecting the drop down arrow and the average score and rating of record will

automatically recalculate.

Progress Revie	ews Annua ppraisal	Narrative Statements	View/Print Form Manage	Guest Participants			
sessments and Ra	tings Rating of Record	Approvals and Acknowl	ledgments				
ployee Information	-					Choose an Action	▼ Go
	EHRIS Bwraox, Wzhjkuw	G					
							Need Hel
App	oraisal Type Annual App	oraisal - DoD	Apprais	al Period Start Date 01-Apr	-2016		
Appraisal Éf	oraisal Type Annual App fective Date 01-Jun-201	oraisal - DoD	Apprais	-	-2016		
Appraisal Eff	oraisal Type Annual App fective Date 01-Jun-201	oraisal - DoD	Apprais	al Period Start Date 01-Ap	-2016		
Appraisal Éf	Performance Element	raisal - DoD 7 Title	Apprais	al Period Start Date 01-Ap sal Period End Date 31-Ma Status	-2016 -2017 Performance Element Type		tating
Appraisal Éff Performance El Order 1	Performance Element	Title	Apprais	al Period Start Date 01-Api sal Period End Date 31-Ma Status Approved	2015 2017 Performance Element Type Critical	3	
Appraisal Èff Performance El Order 1 2	Performance Element Perfor	Title 2	Apprais	al Period Start Date 01-Ap sal Period End Date 01-Ap Status Approved Approved	2015 2017 Performance Element Type Critical	3	
Appraisal Éff Performance El Order 1	Performance Element	Title 2	Apprais	al Period Start Date 01-Api sal Period End Date 31-Ma Status Approved	2015 2017 Performance Element Type Critical	3	
Appraisal Éfi Performance El X 2 6 0 Order 1 2 3	Annual App ective Date 01-Jun-201 ement Ratings Performance Element Performance Element Performance Element	Title 2	Apprais	al Period Start Date 01-Ap sal Period End Date 01-Ap Status Approved Approved	2015 2017 Performance Element Type Critical	3	
Appraisal Èff Performance El Order 1 2	Annual Ap ective Date 01-Jun-201 lement Ratings Performance Element Performance Element Performance Element Performance Element Performance Element Ave	Title 2	Apprais	al Period Start Date 01-Ap sal Period End Date 01-Ap Status Approved Approved	2015 2017 Performance Element Type Critical	3	

Figure 5 - Annual Appraisal>Rating of Record

7. Selecting the Rating drop down arrow, allows you to select another rating of 5, 3, 1, or NR.

an Progress Revie	ws Annual Appraisal Narrative Statements View/Print Fo	rm Manage Guest Participants			
Assessments and Rati	ings Rating of Record Approvals and Acknowledgments				
				Choose an Action	♥ Go
Employee Informatio	n				
Employee Name E Show Employee De	HRIS Bwraox, Wzhjkuw G talis				
					Need Help?
Appraisal Éffe	aisal Type Annual Appraisal - DoD cover Date 01-Jun-2017 ment Ratings	Appraisal Period Start Date Appraisal Period End Date			
a 2 🗆 🕸					
Order	Performance Element Title Performance Element 1	Status Approved	Performance Element Type Critical	1	
2	Performance Element 2	Approved	Critical	5	
3	Performance Element 3	Approved	Critical	LN .	R
Rating of Record	1				
	Average Score 3.7 Rating of Record 3				
				Save and Go Back	Save and Continue

**Figure 6** - Annual Appraisal>Rating of Record>Review or Change Ratings

8. Once performance narratives and element ratings are entered, you can transfer to the employee for their input against each performance elements and standard(s). The employee will not be able to view your performance narratives and element ratings until the annual appraisal has been communicated to the employee.

9. To transfer your performance plan/appraisal to the employee, first select **Choose an Action** LOV drop down arrow depicted in the red box below. Second, select **Transfer to Employee**. Lastly select the **Go** button to the right.

oyee Information				Choose an Action Change Rating Official or Higher Level Reviewer Transfer to Employee
loyee Name EH ow Employee Deta	IRIS Bwraox, Wzhjkuw G ilis			Transer to Employee Track Progress Return to Main Page
				Need Help?
Appra	nowledgments' tab to complete the process. nly "Approved" performance elements and standards are used to o isial Type Annual Appraisal - DoD	Appraisal Period Start Date 01-Apr-2016		
Appra Appraisal Effect Performance Elec	nly "Approved" performance elements and standards are used to o iisal Type Annual Appraisal - DoD tive Date 01-Jun-2017			
Appraisal Effec	hy "Approved" performance elements and standards are used to o issal Type Annual Appraisal - DoD tive Date 01-Jun-2017 ment Ratings	Appraisal Period Start Date 01-Apr-2016 Appraisal Period End Date 31-Mar-2017		
Appra Appra Appraisal Effec Performance Eler	Ny "Approved" performance elements and standards are used to o issil Type Annual Appraisal - DoD time Date 01-Jun-2017 ment Ratings Performance Element Title	Appraisal Period Start Date 01-Apr-2016 Appraisal Period End Date 31-Mar-2017 Status	Performance Element Type	Rating
Appraisal Effect Appraisal Effect Performance Eler Crider 1	nh 'Approved' performance elements and standards are used to o issat Type Annual Appraisal - DoD ment Ratings Performance Element Title Performance Element 1	Appraisal Period Start Date 01-Apr.2016 Appraisal Period End Date 31-Mar-2017 Status Approved	Critical	3 🗸
Appraisal Effect Appraisal Effect Performance Elect Order 1 2	hy "Approved" performance elements and standards are used to o isial Type Annual Appraisal - DoD tive Date 01-Jun-2017 ment Ratings Performance Element Title Performance Element 1 Performance Element 2	Appraisal Period Start Date 01-Apr-2016 Appraisal Period End Date 01-Apr-2017 Status Approved Approved	Critical Critical	3 🗸
Appraisal Effect Appraisal Effect Performance Eler Crider 1	nh 'Approved' performance elements and standards are used to o issat Type Annual Appraisal - DoD ment Ratings Performance Element Title Performance Element 1	Appraisal Period Start Date 01-Apr.2016 Appraisal Period End Date 31-Mar-2017 Status Approved	Critical	3 🗸

Figure 7 - Choose an Action>Transfer to Employee

10. You have the option to transfer to the employee with or without e-mail notification. If you chose to enter comments in the **Message to Employee** area, your message will show up in the e-mail. Select the **Transfer to Employee without E-mail Notification** or **Transfer to Employee with E-mail Notification** button to transfer the performance plan to the employee.

Rating Official Notification to Employee - EHRIS Bwraox, Wzhjkuw G			
	Cancel	Transfer to Employee without E-mail Notification	Transfer to Employee with E-mail Notification
Message to Employee			
This screen allows you to send a message to your employee regarding their performance plan/appraisal. The notification can be sent with or the sent with the sent sent sent sent sent sent sent sen	vithout an en	ail message.	
<ul> <li>To provide additional information to the employee, enter a message in the text box below Message to Employee and select Transfer to         If you choose not to send a message, select Transfer to Employee without E-mail Notification button. You will need to contact the employee.         Select Cancel button at top right correr to go back to previous screen without making any changes.     </li> </ul>			
For additional guidance, select Need Help?			
Please go to your Performance Management and Appraisal to view or update your performance plan.			
Enter message to employee here.			
		~	
	Spell Che	k	
Notice: You are about to contact EHRIS Bwraox, Wzhjkuw G by e-mail. Due to the unencrypted nature of this e-mail communication, please d e-mail.	o not include	any non-public information such as social security n	umbers or privacy act information in your
e-IIIdii.			

Figure 8 - Rating Official Notification to Employee

**NOTE**: If the employee does not have an email address in DCPDS, the page that appears will only give you the option to send without email notification. You will also be advised to contact the employee to have them enter an email address for work using MyBiz+.

11. You will be returned to the *MyPerformance Main Page* and will receive a confirmation that the appraisal has been submitted to the employee. The performance plan/appraisal is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page* as pictured in Figure 9. You no longer have ownership and can only view the performance plan/appraisal. However, at any time, you have the option to retrieve the plan from the employee.

MyPerformance Main Page Plove	ide Guest Feedback										
Confirmation The appraisal has been submitte	ed to the employee.										
Rating Official/Higher Level Re	eviewer										
			My	Performan	ce Main Page						
										Nee	d Help?
		pplication is designed thorized release of cl							nation in		
From the Main Page, you can create,	update and view employ	ee Performance Plans; char	nge the Rating Offic	ial and/or Higher L	evel Reviewer, view and p	print part o	r an entire plan a	after it is created; clos	e a plan, and track t	he status of	a plan.
You can also search for completed pla	ans by selecting the 'Sho	w Completed Plans/Apprais	als' link located at t	he bottom of this p	age.						
To create a Performance Plan:	To complete of	other actions described abov	re:								
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> </ul>	Select	an option from the Action co	olumn								
<ul> <li>Select Applaisal Plan Type</li> </ul>											
Select Appraisal Plain Type     Select the 'Go' button	Select	the 'Go' button									
Select the 'Go' button											
Select the 'Go' button Important: To become familiar with th	he columns, select the 'N	eed Help?' link.									
Select the 'Go' button Important: To become familiar with th Plans/Appraisals in Progress     O'TIP Only Employees that have a	he columns, select the 'N	eed Help?' link.							reate New Plan	X	
Select the 'Go' button Important: To become familiar with th Plans/Appraisals in Progress     O'TIP Only Employees that have a	he columns, select the 'N plan in progress are liste	eed Help?' link. d below.						c thoose a Plan Type	reate New Plan	V	Go
<ul> <li>Select the 'Go' button</li> <li>Important: To become familiar with th</li> <li>Plans/Appraisals in Progress</li> <li>Ø TIP Only Employees that have a</li> </ul>	he columns, select the 'N plan in progress are liste Appraisal Year	eed Help?' link. d below.							reate New Plan	v	Go
Select the 'Go' button Important: To become familiar with th Plans/Appraisals in Progress     TIP Only Employees that have a Show Me All Appraisals     Records Displayed 10 1 1 2	plan in progress are liste Appraisal Year	eed Help?' link. d below. ALL 💌	Appraisal Year 🗠	Appraisal ID 🛆	Pian Approval Date 스	Туре 🛆		hoose a Plan Type	reate New Plan		G0 ¥ G0

Figure 9 - MyPerformance Main Page

# **Reviewing and Editing Performance Narrative and Element Ratings**

After the annual review has been started by either you or employee, it may require edits and further input from either you or your employee. The annual review could be routed to you awaiting your performance narrative, work in process requiring edits, or final document ready for review. You are not able to make any edits to the employee input.

This section shows you how to edit your performance narrative and element ratings and transfer it back and forth between you and your employee.

## **Steps to Review and Edit Annual Appraisal**

1. At the *MyPerformance Main Page*, select the performance plan/appraisal you want to edit the performance narrative, make sure **Action** column reflects **Update** and select the **Go** button. You must have ownership of the performance plan to make any changes.

MyPerformance Main Page Prov	vide Guest Feedback									
Rating Official/Higher Level R	Reviewer									
				MyPerforma	ance Main Page					
										Need Help?
		plication is designed for se on is a violation of law and			tion only. Do NOT ente	r classified i	nformation in th	is system. Unautho	rized release of	
From the Main Page, you can create	, update and view employee Perform	ance Plans; change the Rating Offi	ial and/or Higher Level Re	eviewer; view and print	part or an entire plan after it is o	reated; close a	plan, and track the s	tatus of a plan.		
You can also search for completed p	lans by selecting the 'Show Complete	ed Plans/Appraisals' link located at	the bottom of this page.							
To create a Performance Plan:	To complete other action	s described above:								
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> </ul>	<ul> <li>Select an option f</li> <li>Select the 'Go' but</li> </ul>	rom the Action column								
Select the 'Go' button	<ul> <li>Select the 'Go' bu</li> </ul>	tton								
Important: To become familiar with	the columns, select the 'Need Help?'	link.								
Plans/Appraisals In Progress										
IP Only Employees that have a	a plan in progress are listed below.									
Show Me All Appraisals	Appraisal Year ALL							Choo	Create New I se a Plan Type	Plan Go
Records Displayed 10 💌 1 😰	( 😂 🗔 🙀									
Employee Name EHRIS Bwraox, Wzhikuw G	Current Owner EHRIS Caaohu, Crdadd I	Rating Official Name EHRIS Caaohu, Crdodd I	Appraisal Year  2017	Appraisal ID 195	Plan Approval Date 25-Apr-2016	Type 🛆 DoD	Plan Status Approved	Current Status Progress Review	Action Update	
Erneis owraux, WZNjkuw G	Enikio Gaaonu, Croqoo I	Enkis Gaaonu, Grogod I	2017	130	20-9401-2010	000	Abbroved	Completed	Opdate	
Select the link to search for Complet >Show Completed Plans/Appraisals										

Figure 10 - MyPerformance Main Page

2. When a rating official has update capability (when **Action** column on *Main Page* reflects **Update**), the rating official must acknowledge (using **Acknowledge** button) that he or she has read and acknowledges his or her role and responsibilities during the appraisal period each time before working in MyPerformance.

Supervisory Commitment Statement I acknowledge my role as a supervisor is valid in Instemp a fair, credible, and transparent performance system. It is important that I ensure performance elements are linked to organizational performance goals, establish open communication, motor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	
Lacknowledge my role as a supervisor is vital in hostering a fair, credible, and transparent performance system. It is important that Lensure performance elements are linked to organizational performance goals, establish open communication, monitor and evaluate employee performance; encognize and reveard performance, and appropriately address deficient performance.	
	Acknowledge

Figure 11 - Supervisory Commitment Statement

3. The *Plan Details* page is displayed as pictured below in Figure 12. Select *Annual Appraisal* tab to review and update the annual appraisal.

	₩					
Plan Progress Reviews Annu	al Appraisal Narrative Statements	View/Print Form	Manage Guest Participants			
Step 1: Plan Details Step 2: M	ission Goals Step 3: Performance El	ements and Standards	Step 4: Approvals and Acknow	wledgments		
					Choose an Action	Go
Employee Information						
Employee Name EHRIS Bwra Show Employee Details	ox, Wzhjkuw G					
This screen allows you to view an	d change the details of your employee	's performance plan.				
Step 1: Plan Details						
	and higher level reviewer name is corre- button at the bottom right corner to me					
TIP: Choose an Action - located	at the top right corner – allows for sele	tion of other actions th	roughout the performance cycle.			
For additional guidance, select	eed Help?					
* Associat Tes	Annual Annuals al DaD by	D	erformance Plan Approval Date	25-Apr-2016		
<ul> <li>* Appraisal Type</li> <li>* Appraisal Period Start Date</li> </ul>			Plan Last Modified Date	06-Sep-2016		
* Appraisal Period Start Date			Created By	EHRIS Caaohu, Crdqdd	1	
* Appraisal Effective Date						
Rating Official Name	EHRIS Caaohu, Crdqdd I					
Higher Level Reviewe	EHRIS Cazfx, Duszaxwycpcok C					
						Save and <u>Continue</u>

Figure 12 - Step 1: Plan Details>Navigate to Annual Appraisal

4. The *Annual Appraisal* page is displayed as pictured in Figure 13. Select the radio button next to the performance element and standards you want to edit your performance narrative and/or performance element rating.

Progress	Reviews	Annual Appraisal Nanative Statem	nents ViewPrint Form Mana	ge Guest Participants				
		ps Rating of Record Approvals and A						
							- Choose an Action -	¥
cyce Infor								
oyee Nam pe Employ	e EHRIS ee Details	IS Dwracx, Wahjkuw G						
								Nee
his screet	allows up	to size your empire of a performance of	instants and standards and salt as	oesaments and write your evaluations. Select the	Tarks' half on and half a performan	in the second second second second	in which a shake	
					Hadlo button next to the perior	nce element and standardyly	you want to evaluate.	
Apprais	sai Effectiv	ul Type Annual Apprainal - DoD ve Date 91-Jun 2017	70	raisal Period Start Date 01.Apr 2016 prasal Period End Date 31.Mar 2017				
Performan	nce Eleme	antis						
t e 🗆	. 0							
Select	Order	Performance Element Title	Status	Performance Element Type	Rating			
	1	Performance Dement 1	Approved	Critical				
0	2	Performance Element 2	Approved	Critical				
0	3	Performance Element 3	Approved	Ortical				
Performan	Ace Eleme	ent and Standard(s)						
Employee	Input							
mployee	Input							
imployee I	Input							
imployee I	Input							
imployee I	Input							
Imployee I	Input							
impiloyee I	Input							
Impiloyee I	Input							
impiloyee I	Input							
	Input Icial Asses	sament						
Rating Office	icial Asses							
Rating Office	kial Asses	performance narrativ	ve here. You hav	'e a limit				
Rating Office	kial Asses		ve here. You hav	'e a limit				
Rating Office	kial Asses	performance narrativ	ve here. You hav	'e alimit				
Rating Office	kial Asses	performance narrativ	ve here. You hav	'e a limit				
Rating Office	kial Asses	performance narrativ	ve here. You hav	'e alimit				
Rating Office	kial Asses	performance narrativ	ve here. You hav	re a limit				
Rating Office E	kial Asses	performance narrativ 00 characters.	ve here. You hav		Counter			
Rating Office E C	icial Asses Enter of 200	performance narrativ 00 characters.	ve here. You hav	re a limit	Counter			
Rating Office E C	icial Asses Enter of 200	performance narrativ 00 characters. even et Rating	F. ].		Counter			
Rating Office E C	icial Asses Enter of 200	performance narrativ 00 characters.	[, ] _		Courter			
Rating Office E C	icial Asses Enter of 200	performance narrativ 00 characters. even et Rating	F. ].		Counter		Co to Next Performance Dement	io Back to Iop d

**Figure 13 -** *Assessments and Ratings*>*Edit Performance Narratives and Ratings* 

5. At this point, you have made all of the changes to your performance narratives and element ratings and reviewed the employee input. You can either transfer to employee for changes to their input or start the approval and/or communication process. Select *Approvals and Acknowledgments* tab to document approval and communication process.

Plan	Progress Reviews Annual Appraisal Narrative Statements View/Print Fo	orm Manage Guest Participants				
Ass	ssments and Ratings Rating of Record Approvals and Acknowledgments					
				Choos	se an Action	Go
Emp	loyee Information					
	loyee Name EHRIS Bwraox, Wzhjkuw G ow Employee Details					
Thi	screen provides information regarding the status of your employee's appraisal.					Need Help?
	the 'Start' button is active, select it to complete the process. elect 'Show' link to see approvals and acknowledgments information for each step.					
	č 🗅 💠					
	All Details   Hide All Details					
Deta	s Tasks			Action		
Þ	Step 1: Rating Official - Request or Document Higher Level Review (if required)		Not Started	Start		
Þ	Step 2: Higher Level Reviewer - Review (if required)		Not Started	Step 1 must be completed		
Þ	Step 3: Rating Official - Document Communication to Employee		Not Started	Start		
Þ	Step 4: Rating Official - Document Employee Acknowledgment		Not Started	Step 3 must be completed		
						Save and Go Back

Figure 14 - Annual Appraisal>Approvals and Acknowledgments

# **Approving the Annual Appraisal**

As described earlier, the typical steps in the annual appraisal process are as follows. The steps covered in this section are bold and italicized:

1. The employee or rating official starts the annual appraisal, transfers to employee to enter input, and rating official enters performance narratives and element ratings for each performance element and standard(s).

2. The employee and rating official edit and/or add to the input and/or performance narratives and element ratings as needed. This process may involve multiple rounds of editing and transfers between the employee and rating official before the annual appraisal is communicated to the employee.

3. The annual appraisal is approved by the higher level reviewer, as appropriate, or the rating official documents the higher level reviewer approval.<sup>1</sup>

# 4. The rating official documents communication to employee and transfers the annual appraisal to the employee for acknowledgment.

5. The employee reviews the annual appraisal and acknowledges that it was communicated to him or her by the rating official.

6. If an employee is not available to acknowledge or refuses to acknowledge the annual appraisal, you will need to document this information.

<sup>&</sup>lt;sup>1</sup> \*As required by Component policy IAW DoDI 1400.25 V431

# Table 3: Annual Appraisal Approval Steps

Step Number	Performer	Approval Step	Status	Description
1	Rating Official	Request or Document	Not Started	
	(RO)	Higher Level Review*	Completed	RO has requested HLR review or documented that HLR review has occurred*
2*	Higher Level	Review	Not Started	
	Reviewer (HLR), as appropriate		Completed	HLR has approved the plan
3	Rating Official	Document Communication to Employee	Not Started	
			Completed	RO has entered communication method and date and transferred to the employee or proceeded to Step 4
4	Employee or	Document Employee	Not Started	
	Rating Official	Acknowledgment	Completed	Employee acknowledged receipt or RO has entered com- munication method and date

The below table provides the steps to be taken for obtaining approval of the annual appraisal.

\*As required by Component policy IAW DoDI 1400.25 V431

#### **Steps for Annual Appraisal Approval**

1. At the *MyPerformance Main Page* select the annual approval you want the higher level reviewer to approve or document the higher level reviewer approval, make sure **Action** column reflects **Update** and select **Go** button. You must have ownership of the performance plan.

MyPerformance Main Page Prov	vide Guest Feedback									
Rating Official/Higher Level R	Reviewer									
				MyPerforma	ance Main Page					
										Need Help?
		plication is designed for se on is a violation of law and			tion only. Do NOT ente	r classified i	nformation in th	is system. Unautho	rized release of	
From the Main Page, you can create	, update and view employee Perform	ance Plans; change the Rating Offi	ial and/or Higher Level Re	eviewer; view and print	part or an entire plan after it is o	reated; close a	plan, and track the s	tatus of a plan.		
You can also search for completed p	lans by selecting the 'Show Complete	ed Plans/Appraisals' link located at	the bottom of this page.							
To create a Performance Plan:	To complete other action	s described above:								
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> </ul>	<ul> <li>Select an option f</li> <li>Select the 'Go' but</li> </ul>	rom the Action column								
Select the 'Go' button	<ul> <li>Select the 'Go' bu</li> </ul>	tton								
Important: To become familiar with	the columns, select the 'Need Help?'	link.								
Plans/Appraisals In Progress										
IP Only Employees that have a	a plan in progress are listed below.									
Show Me All Appraisals	Appraisal Year ALL							Choo	Create New I se a Plan Type	Plan Go
Records Displayed 10 💌 1 😰	( 😂 🗔 🙀									
Employee Name EHRIS Bwraox, Wzhikuw G	Current Owner EHRIS Caaohu, Crdadd I	Rating Official Name EHRIS Caaohu, Crdodd I	Appraisal Year  2017	Appraisal ID 195	Plan Approval Date 25-Apr-2016	Type 🛆 DoD	Plan Status Approved	Current Status Progress Review	Action Update	
Erneis owraux, WZNjkuw G	Enikio Gaaonu, Croqoo I	Enkis Gaaonu, Crogod I	2017	130	20-9401-2010	000	Abbroved	Completed	Opdate	
Select the link to search for Complet >Show Completed Plans/Appraisals										

Figure 15 - MyPerformance Main Page

2. When a rating official has update capability (when **Action** column on *Main Page* reflects **Update**), the rating official must acknowledge (using **Acknowledge** button) that he or she has read and acknowledges his or her role and responsibilities during the appraisal period each time before working in MyPerformance.

	Confirmation		
L		Supervisory Commitment Statement	
		Lacknowledge my role as a supervisor is vital in lostering a fair, credble, and transparent performance system. It is important that Lensure performance elements are linked to organizational performance goals, establish open communication, monitor and evaluate employee performance, recognize and reward performance, and appropriately address deficient performance.	
L			Acknowledge

Figure 16 - Supervisory Commitment Statement

3. Navigate to annual appraisal by selecting the *Annual Appraisal* tab.

_		₽					
Plan	Progress Reviews Annua	al Appraisal Narrative Statements	View/Print Form	Manage Guest Participants			
Ste	1: Plan Details Step 2: Mis	ssion Goals Step 3: Performance El	ements and Standards	Step 4: Approvals and Acknow	vledgments		
						Choose an Action	Go
Emp	loyee Information						
	ployee Name EHRIS Bwrac how Employee Details	ox, Wzhjkuw G					
Thi	s screen allows you to view and	d change the details of your employee	's performance plan.				
Ste	p 1: Plan Details						
		and higher level reviewer name is corre button at the bottom right corner to mo					
TIP	: Choose an Action – located a	at the top right corner – allows for selec	ction of other actions thr	roughout the performance cycle.			
For	additional guidance, select Ne	eed Help?					
			0-	free and Directory Deter	05 4 0040		
	<ul> <li>* Appraisal Type</li> <li>* Appraisal Period Start Date</li> </ul>	Annual Appraisal - DoD V 01-Apr-2016	Pe	erformance Plan Approval Date Plan Last Modified Date	25-Apr-2016 06-Sep-2016		
	<ul> <li>Appraisal Period Start Date</li> <li>* Appraisal Period End Date</li> </ul>			Created By	EHRIS Caaohu, Crdqdd	I	
	* Appraisal Effective Date						
	Rating Official Name	EHRIS Caaohu, Crdqdd I					
	Higher Level Reviewer	EHRIS Cazfx, Duszaxwycpcok C					
							Save and Continue

Figure 17 - Step 1: Plan Details>Navigate to Annual Appraisal

4. The Annual Appraisal page is displayed as pictured in Figure 18. Navigate to Approvals and Acknowledgments tab and select the **Start** button for *Step 1: Rating Official* – *Request or Document Higher Level Review (if required).* 

**NOTE**: A rating of '1' Unacceptable must be reviewed and approved by a higher level reviewer.

				Choose an Action	<b>Y</b>
Emplo	oyee Information				
	loyee Name EHRIS Bwraox, Wzhjkuw G ow Employee Details				
his s	screen provides information regarding the status of your employee's appraisal.				Need H
This s	screen provides information regarding the status of your employee's appraisal.				Need H
					Need H
• If th	screen provides information regarding the status of your employee's appraisal. the 'Start' button is active, select it to complete the process. let' Show' link to see approvals and acknowledgments information for each step.				Need He
. If tr	the 'Start' button is active, select it to complete the process.				Need H
• If th Sel	the 'Start' button is active, select it to complete the process.				Need H
If th Sel	the 'Start' button is active, select it to complete the process. Elect 'Show' link to see approvals and acknowledgments information for each step.				Need H
If the Sel	the 'Start' button is active, select it to complete the process. elect 'Show' link to see approvals and acknowledgments information for each step.		Action		Need H
If the Sel	the 'Start' button is active, select it to complete the process. tect 'Show' link to see approvals and acknowledgments information for each step. Source Start' Start	Not Started	Action Start		Need H
If the Sel	the 'Start' button is active, select it to complete the process. Het' Show' link to see approvals and acknowledgments information for each step.	Not Started Not Started			Need H
If the Sel	the 'Start' button is active, select it to complete the process. Stect' Show' link to see approvals and acknowledgments information for each step.		Start		Need H

Figure 18 - Approvals and Acknowledgments>Step 1: Rating Official - Request or Document Higher Level Reviewer

5. The Step 1 task has been opened for detail review and additional information. The following options are available:

**Option A:** Select Option A if the higher level reviewer needs to review and approve the performance plan.

- Change the name of the higher level reviewer, if necessary.
- Select **Transfer to Higher Level Reviewer with** or **without email notification**. (If there is no email address for the higher level reviewer, you will only have the option to transfer without email notification.)
- Enter a notification message to the higher level reviewer and select **Transfer to Higher** Level Reviewer with E-mail Notification.

**NOTE:** Select Option B if you are both the rating official and higher level reviewer.

								Choose an Action	¥ (
mployee Ir	lormation								
	ime EHRIS Bwraox, Wzhjikuw G oyee Details								
nis screen	rovides information regarding the status of your employee's appraisal.								Need He
	r button is active, select it to complete the process. w/ link to see approvals and acknowledgments information for each step.								
2 🗟	>								
	Is   Hide All Details								
rtails	Tasks Step 1: Rating Official - Request or Document Higher Level Review (if required)				Not Started	Action			
	Step 1: Rating Official - Request or Document Higher Level Review (if required)				Not Started	Stan			
CT TIP			Ontion B to docum	land the approval					
_	There are two options available to complete this step. If you are both the rating official and hig	pher level reviewer, use	Option B to docum	ient the approval.					
	here are two options available to complete this step. If you are both the rating official and hig on A - Transfer to the Higher Level Reviewer	pher level reviewer, use	Option B to docum	ent the approval.					
_	ion A - Transfer to the Higher Level Reviewer Name	Title	Option B to docum	ent the approval.					
	ion A - Transfer to the Higher Level Reviewer Name EHRIS Casohu, Cróqdd I	Title Rating Official	Option B to docum	tent the approval.					
	Ion A - Transfer to the Higher Level Reviewer Name EHISI Cashou, Cródod I EHISI Cashou zazwayczoch C Highe	Title	Option B to docum	sent the approval.					
	Ion A - Transfer to the Higher Level Reviewer Hane EHIIS Gashu, Crógód I EHIIS Gash, Duzawayspoch C GITP Phase select new ILR finn lací of values, if required. Highe	Title Rating Official	Option B to docum	ent the approval.					
_	Ion A - Transfer to the Higher Level Reviewer Name EHISI Cashou, Cródod I EHISI Cashou zazwayczoch C Highe	Title Rating Official	Option B to docum	ent the approval.					
_	Ion A - Transfer to the Higher Level Reviewer Internet EHRIS Cascho, Crópód I EHRIS Cascho, Crópód I EHRIS Cascho, Dezazowyspok C Gill Piesas sold en vill Kin m Ist of values, if reguined. Change Higher Level Reviewer EHRIS Casth, Dazzawyspok C	Title Rating Official	Option B to docum	ent the approval.					
_	Ion A - Transfer to the Higher Level Reviewer Hane EHIIS Gashu, Crógód I EHIIS Gash, Duzawayspoch C GITP Phase select new ILR finn lací of values, if required. Highe	Title Rating Official	Option B to docum	ent the approval.					
	Ion A - Transfer to the Higher Level Reviewer Name EHHIS Gaschu, Crópdd I EHHIS EHIS E	Title Rating Official rr Level Reviewer							
	Ion A - Transfer to the Higher Level Reviewer Internet EHRIS Cascho, Crópód I EHRIS Cascho, Crópód I EHRIS Cascho, Dezazowyspok C Giff Piesau selder w HLK from fact of values, if reguined. Change Higher Level Reviewer EHRIS Casth, Dazzawyspok C	Title Rating Official rr Level Reviewer			ander to Higher Level Reviewer	with E-mail Notification' button	to send the message.		
_	Ion A - Transfer to the Higher Level Reviewer Name EVHIS Coacho, Colgod I EVHIS Coacho, Coacho, Colgod I EVHIS Coacho,	Title Rating Official rr Level Reviewer			ander to Higher Level Reviewer	with E-mell Notification' button	to send the message.		
_	Ion A - Transfer to the Higher Level Reviewer Name EVHIS Coacho, Colgod I EVHIS Coacho, Coacho, Colgod I EVHIS Coacho,	Title Rating Official rr Level Reviewer			ander to Higher Level Reviewer	with E-mail Notification' button	to send the message.		
_	ten A - Transfer to the Higher Level Reviewer  Name EVHIS Coache, Octoped I EV	Title Rating Official rr Level Reviewer			anafer to Higher Level Reviewer	with E-mail Notification' button	to send the message.		
	ten A - Transfer to the Higher Level Reviewer  Name EVHIS Coache, Octoped I EV	Title Rating Official rr Level Reviewer			ansfer to Higher Level Reviewer	with E-mail Notification' button	to send the message.		
	Ion A - Transfer to the Higher Level Reviewer Name EVHIS Coacho, Colgod I EVHIS Coacho, Coacho, Colgod I EVHIS Coacho,	Title Rating Official r Level Reviewer			ander to Higher Level Reviewer	eth E-mail Notification' button	to send the message.		
_	ten A - Transfer to the Higher Level Reviewer           Name	Title Raing Official r Level Reviewer n employee's Annual Ag Spell Check	ppraisal. After writin	ng The message, select the "Tr					
	ten A - Transfer to the Higher Level Reviewer  Name EVHIS Coache, Octoped I EV	Title Raing Official r Level Reviewer n employee's Annual Ag Spell Check	ppraisal. After writin	ng The message, select the "Tr					
_	ten A - Transfer to the Higher Level Reviewer           Name	Title Raing Official r Level Reviewer n employee's Annual Ag Spell Check	ppraisal. After writin	ng The message, select the "Tr					

Figure 19 - Approvals and Acknowledgments>Option A

6. The rating official is navigated to *MyPerformance Main Page* after selecting to transfer to the higher level reviewer with email in **Option A**. The rating official will receive a Confirmation message stating the plan/appraisal has been submitted to the higher level reviewer. The **Current Status** is now 'Annual Pending HLR Approval.'

Confirmation The appriad has been submitted to the Higher Level Reviewer.
Rating OfficialHigher Level Reviewer
MyPerformance Main Page
Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.
From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, and track the status of a plan.
You can also search for completed plane by selecting the "Show Completed Plane)Approximate' link located at the bottom of this page.
To create a Performance Plan: To complete other actions described above:
Select Througe a Plan Typer     Select an option from the Action column     Select Througe and Plan Typer     Select The 'Go' button     Select The 'Go' button
Important: To become familiar with the columns, select the 'Need Help?' link.
Plans/Appraisals in Progress
@TIP Only Employees that have a plan in progress are loted below.
Show Ma Alf Appravahi V Appravahi V Appravahi Var ALL V Create New PlanChoose a Plan TypeV 666
Records Displayed 10 V 1 1 C R & R &
Employee Name A Current Querer A Rating Official Name A Approximal IVear A Approximal ID A Plan Approxal Date A Type Plan Status A Current Status A Action
EHRIS Banson, Wzhjewe G EHRIS Catch, Dotzannyspock C EHRIS Catcho, Crógod I 2017 195 25-Apr-2016 DxD Appreval Appreval Pronting HLR Approval View 🖤 🙆

Figure 20- MyPerformance Main Page>Confirmation Message

7. **Option B:** Annual Appraisal / Approvals and Acknowledgments tab and select **Start** button for *Step 1: Rating Official – Request or Document Higher Level Review*. **Option B** is located in the lower portion of the page and provided here.

Option B - Document the higher level review has taken place by entering the following information						
Higher Level Reviewer EHRIS Caztx, Duszakwycpcok C 🚽 🔍 Review Date 🔯	Method of Review Other Method		Cancel Save			
Step 2: Higher Level Reviewer - Review (if required)		Not Started	Step 1 must be completed			
Step 3: Rating Official - Document Communication to Employee		Not Started	Start			
Step 4: Rating Official - Document Employee Acknowledgment		Not Started	Step 3 must be completed			

Figure 21 - Approvals and Acknowledgments>Option B

8. If the higher level reviewer has given the rating official the authority to document the rating official's decisions and the higher level reviewer's approval, the rating official will select Option B. Option B also applies if the rating official is the higher level reviewer or

there is no higher level reviewer. The following options are available:

## Table 4 – Documenting the Higher Level Reviewer Process

- Change the name of the higher level reviewer, if necessary.
- Document the higher level review has taken place, enter the following information:
  - Enter the Review Date, and
  - Enter Method of Review and Other Method, if necessary (see below chart)

If You	Then
Communicated the performance plan	Select Face-to-Face or Telephone
by face-to-face meeting or telephone	from the Communication Method list
	of values (LOV), as appropriate
Communicated the peformance plan	Select Other from Communication
using some other method	Method LOV and enter a short
	description of the method in <b>Other</b>
	field (20 characters maximum)

#### 9. Select the **Save** button.

Higher Level Reviewer EMRIS Cazta, Duszawsycpcok C 3/4 Method of Review Telephone Other Method Cancel Save Cancel Cancel Save	
Step 2: Higher Level Reviewer - Review (if required) Not Started Step 1 must be completed	
> Step 3: Rating Official - Document Communication to Employee Not Started Start	
> Step 4: Rating Official - Document Employee Acknowledgment Not Stated Step 3 must be completed	

Figure 22 - Approvals and Acknowledgments>Option B>Documenting Higher Level Review

10. Certify the information in this performance plan accurately documents the rating official's decisions and the higher level reviewer's approval by selecting the **Yes** button.

Confirmation	
I certify that the information in this Progress Review accurately documents the Rating Official's decisions and the Higher Level Reviewer's approval.	
	No Yes

Figure 23- Approvals and Acknowledgments>Option B>Certification

11. The next step would be to document communication to employee, select the **Start** button to the right of the task titled: *Step 3: Rating Official - Document Communication to Employee* Start button.

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Participants				
Assessments and Ratings Rating of Record Approvals and Acknowledgments				
Assessments and Racings (Racing of Record Approvals and Acknowledgments				
			Choose an Action	Go
Employee Information				
Employee Name EHRIS Bwraox, Wzhjkuw G >Show Employee Details				
This screen provides information regarding the status of your employee's appraisal.				Need Help?
<ul> <li>If the 'Start' button is active, select it to complete the process.</li> <li>Select 'Show' link to see approvals and acknowledgments information for each step.</li> </ul>				
<ul> <li>Select oner link to see apprendis uno accinencaginenta internacion for each acp.</li> </ul>				
M C 🖻 🖗				
Show All Details   Hide All Details				
Details Tasks		Action		
Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed		
Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed		
Step 3: Rating Official - Document Communication to Employee	Not Started	Start		
Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed		
				Save and Go Back

Figure 24 - Approvals and Acknowledgments>Step 3 Rating Official - Document Communication to Employee

12. To document communication with employee has taken place; enter the following information using the table provided.

- Enter the Communication Date, and
- Enter the Communication Method and Other, if necessary (see below chart)

### Table 5 – Documenting communication with the employee

If You	Then
Communicated the performance plan by face-to-face meeting or telephone	Select <b>Face-to-Face</b> or <b>Telephone</b> from the <b>Communication Method</b> list of values (LOV), as appropriate
Communicated the peformance plan using some other method	Select Other from Communication Method LOV and enter a short description of the method in Other field (20 characters maximum)
Tried to communicate to employee and they refused to acknowledge plan or not available to electronically acknowledge it	Select <b>Other</b> from the <b>Communication</b> <b>Method</b> LOV and document it in <b>Other</b> field

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Participants				
Assessments and Ratings Rating of Record Approvals and Acknowledgments				
		Cho	ose an Action	Go
Employee Information				
Employee Name EHRIS Bwraox, Wzhjkuw G >Show Employee Details				
This screen provides information regarding the status of your employee's appraisal.				Need Help?
<ul> <li>If the 'Start' button is active, select it to complete the process.</li> <li>Select 'Show' link to see approvals and acknowledgments information for each step.</li> </ul>				
<ul> <li>Select Show mix to see approvals and acknowledgments mormation for each step.</li> </ul>				
其 2 回 <del>章</del>				
Show All Details   Hide All Details				
Details Tasks		Action		
Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed		
Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed		
Step 3: Rating Official - Document Communication to Employee	Not Started	Start		
Communication Date				
Communication Method				
Other Face to Face Telephone				
Rating Official Name Other dqdd I 🔬 🔍				
Cancel Save and Transfer to	Employee for Ackn	owledgment Save and go to Step 4		
Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed		
			Save	and Go Back

Figure 25 - Approvals and Acknowledgments>Step 3 Rating Official - Document Communication to Employee

13. Once the Communication Date, Method and Other, if necessary, are completed, the rating offical can either select **Save and Transfer to Employee for Acknowledgment** or **Save and go to Step 4**.

14. For this scenario, the rating official selects the **Save and Transfer to Employee for Acknowledgment** button.

Plan Progress Reviews Annual Appraisal Narrative Statements View	ew/Print Form Manage Guest Participants				
Assessments and Ratings Rating of Record Approvals and Acknowledg	ments				
Employee Information				Choose an Action	GO
Employee Name EHRIS Bwraox, Wzhjkuw G >Show Employee Details					
This screen provides information regarding the detailed status of your employed	e's annual appraisal. Select 'Show' link to see approvals a	nd acknowledgme	nts information for each step.		Need Help?
X 2 5 \$					
Details Tasks			Action		
Step 1: Rating Official - Request or Document Higher Level Review (if r	equired)	Completed	Step 1 completed		
Step 2: Higher Level Reviewer - Review (if required)		Completed	Step 2 completed		
Step 3: Rating Official - Document Communication to Employee		Not Started	Start		
Communication Date	26-Apr-2017 🔯				
Communication Method	Face to Face 🗸				
Other					
Rating Official Name	EHRIS Caaohu, Crdqdd I 🛛 🚽 🔍 🚽	-			
	Cancel Save and Transfer to	Employee for Ack	nowledgment Save and go to Step 4		
Step 4: Rating Official - Document Employee Acknowledgment		Not Started	Step 3 must be completed		
					Save and Go <u>B</u> ack

Figure 26 - Approvals and Acknowledgements>Save and Transfer to Employee for Acknowledgment

15. The rating official can send the employee a message regarding the performance plan or transfer to the employee without an E-mail notification. If you need to send an email message, select **Transfer to Employee with E-mail Notification** button. If there is no need for an email message, select **Transfer to Employee without E-mail Notification**.

Rating Official Notification to Employee - EHRIS Bwraox, Wzhjkuw G			
	Cancel	Transfer to Employee without E-mail Notification	Transfer to Employee with E-mail Notification
Message to Employee			
This screen provides space for you to send your employee a message regarding his or her Annual Appraisal. For additional guidance, select. <b>Need Help?</b>	After writing the message, select the 'Transfer	r to Employee with E-mail Notification' button to sen	id the message.
Please proceed to the Performance Appraisal Application to view or update your Annual Appraisal.			
Enter message to employee here.		^	
		~	
	Spell Check	ĸ	
Notice: You are about to contact EHRIS Bwraox, Wzhjkuw G by e-mail. Due to the unencrypted nature of this	e-mail communication, please do not include	any non-public information such as social security n	numbers or privacy act information in your
e-mail.			

Figure 27 - Annual Appraisal>Rating Official Notification to Employee

16. The rating official is navigated to *MyPerformance Main Page*. The rating official will receive a **Confirmation** message stating the plan/appraisal has been submitted to the employee. The employee will need to acknowledge receipt of their performance plan.

NOTE: The Current Status is Pending Employee Acknowledgment.

MyPerformance Main Page Confirmation The appraisal has bee	Provide Guest Feedbac											
Rating Official/Higher	Level Reviewer											
				MyPerro	ormance Main F	'age						
		his application is des Unauthorized release								nation in	Need	Help?
From the Main Page, you ca	an create, update and view e	mployee Performance Plar	s; change the Rati	ng Official and/o	r Higher Level Reviewer	; view and	d print part or an	entire plan a	fter it is created; clos	e a plan, and track the	status of a	plan.
You can also search for con	npleted plans by selecting the	e 'Show Completed Plans/	Appraisals' link loca	ted at the botton	n of this page.							
To create a Performance P	Ian: To com	plete other actions describe	d above:									
<ul> <li>Select 'Appraisal Pla</li> </ul>	Select 'Choose a Plan Type'     Select an option from the Action column     Select 'Appraisal Plan Type'     Select the 'Go' button     Select the 'Go' button											
Important: To become fami Plans/Appraisals in Prog												
									C	reate New Plan		
Show Me All Appraisa	Appraisal Y	rear ALL 🔽						-CI	hoose a Plan Type		~	Go
Records Displayed 10	V 🕅 2 🖻 🥸											
Employee Name	Current Owner 스		Appraisal Year 스	Appraisal ID 🛆	Plan Approval Date	Туре 🛆	Plan Status	Current Stat	tus△	Action		
EHRIS Bwraox, Wzhjkuw G	EHRIS Bwraox, Wzhjkuw G	EHRIS Caaohu, Crdqdd I	2017	195	25-Apr-2016	DoD	Approved	Pending Em Acknowledgi	nployee ment	View		GO
Select the link to search for Show Completed Plans/Ap												

Figure 28 - MyPerformance Main Page>Transfer to Employee Confirmation

17. For this scenario, the rating official selects **Save and go to Step 4** button since the employee may refuse to acknowledge the plan or not be available to electronically acknowledge it, etc.

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print F	orm Manage Guest Participants				
Assessments and Ratings Rating of Record Approvals and Acknowledgments					
				Choose an Action	♥ Go
				Choose an Action	G     G
Employee Information					
Employee Name EHRIS Bwraox, Wzhjkuw G Show Employee Details					
This screen provides information regarding the detailed status of your employee's annual	al appraisal. Select 'Show' link to see approvals and acknowled	Igments information	for each step.		Need Help?
11 2 5 <b>0</b>					
Details Tasks			Action		
Step 1: Rating Official - Request or Document Higher Level Review (if required)		Not Started	Start		
Step 2: Higher Level Reviewer - Review (if required)		Not Started	Step 1 must be completed		
Step 3: Rating Official - Document Communication to Employee		Not Started	Start		
Communication Date	15-May-2017			-	
Communication Method	Face to Face				
Other					
Rating Official Name	EHRIS Caaohu, Crdqdd I 🚽 🔍				
	Cancel Save and Trans	fer to Employee for	Acknowledgment Save and go to Step 4		
Step 4: Rating Official - Document Employee Acknowledgment		Not Started	Step 3 must be completed		
					Save and Go Back

Figure 29 – Annual Appraisal>Approvals and Acknowledgments>Save and go to Step 4

18. Select **Yes** that you are sure you want to go to Step 4.

Confirmation		
Are you sure you want to go to Step 4?		
	No Yes	
Figure 30 - Annual Approvals>Approvals and Acknowledgments> Save and go to Step 4 Confirmation		

19. The **Start** button is available for *Step 4: Rating Official – Document Employee Acknowledgment*. Select **Start** button.

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form Manage Guest Part	ticipants			
Assessments and Ratings Rating of Record Approvals and Acknowledgments				
			Choose an Action	▼ Go
Employee Information				
Employee Name EHRIS Bwraox, Wzhjikuw G ⇒Show Employee Details				
This screen provides information regarding the detailed status of your employee's annual appraisal. Select 'Show' li	nk to see approvals and acknowledgments information for each st	ip.		Need Help?
2011年1月1日日本				
Show All Details   Hide All Details				
Details Tasks		Action		
Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed		
Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed		
Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 Completed		
Step 4: Rating Official - Document Employee Acknowledgment	Dending Empiricalise subsequent	Start		
				Save and Go Back

Figure 31 - Approvals and Acknowledgments>Step 4: Rating Official - Document Employee Acknowledgment

20. To document employee acknowledgment, enter the following information:

- Enter Acknowledgment, and
- Enter **Other Method**, if necessary

## Table 6 – Documenting the employee's acknowledgement

If	Then
Employee is unable to acknowledge	Select Unable to Sign, No System
performance plan due to out of	Access or Employee Declined from
office, no system access, or declined	the Acknowledgment list of values

	(LOV), as appropriate
Performance plan was	Select <b>Other</b> from
acknowledged using some other	Acknowledgment LOV and enter a
method	short description of the method in
	Other Method field (20 characters
	maximum)

21. Enter Acknowledgment and Date and select Save button.

Create/Up	odate Progress Review				
					Go Back to Progress Reviews
Employee	Information				
Linpioyee	intoination				
Employee Show Er	Name EHRIS Bwraox, Wzhjkuw G mployee Details				
Progress	Review Information				
⊗ TIP A p	rogress review should acknowledge achievements to date and suggested areas for improv	ement. It should facilitate meaningful dialogue	e and exchange of accomplishments	and areas for improvement.	
	Progress Review Initiator Progress Review Status Pending Em	hu, Crdqdd I pl Acknowledgment		Progress Review Number 1	
Assessme	Approvals and Acknowledgments				
This screen	provides information regarding the status of your employee's progress review.	100 C			Need Help
				Unable to Sign	
<ul> <li>If the 'Sta</li> <li>Select 'Sl</li> </ul>	rt button is active, select it to complete the process. how' link to see approvals and acknowledgments information for each step.			Other No System Access	
a 2 🖸	1 db			Employee Declined	
	etails   Hide All Details				
Details	Tasks	Status	Action		
Þ	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed		
Þ	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed		
Þ	Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed		
4	Step 4: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	Start		
ØTIP Th	nese fields are auto-populated at the time of employee acknowledgment. If the employee i	s not available or refuses to acknowledge, you	may update this area accordingly.		
	Acknowledgment				
	Other Method				
	Date 01-SEP-2016				
			Cancel Save		

Figure 32 - Approvals and Acknowledgments>Step 4: Rating Official - Document Employee Acknowledgment

22. You will receive a Confirmation message about the appraisal being removed from the Plans/Apraisals in Progress on the *MyPerformance Main Page*, select **Yes** button to continue.

Ba Confirmation	
This appraisal will be removed from your PlansiAppraisals in Progress on the MyPerformance Main Page. An official copy will be placed under the 'Completed PlansiAppraisals' found on the bottom of the MyPerformance Main Page. Select the 'Print Appraisal Form' button if you v print the form prior to exiting this appraisal.	vish to
Do you want to continue?	
160	Yes

Figure 33 - Approvals and Acknowledgments>Step 4: Rating Official - Document Employee Acknowledgment>Confirmation

23. To print a copy of the appraisal form before you return to the *MyPerformance Main Page*, select **Print Appraisal Form** button.

Plan Progress Reviews Annual Appraisal	Narrative Statements	View/Print Form				
Assessments and Ratings Approvals and Ac	knowledgments					
						Choose an Action 🔽 Go
Employee Information						
Employee Name EHRIS Bwraox, Wzhjkuw >Show Employee Details	G					
This screen provides information regarding the	status of your Appraisal.					Need Help?
Select 'Show' to see detailed information abo	ut an approval (dates, meti	od, etc.).				
💢 😂 🖻 🕸						
Show All Details   Hide All Details						
Details Tasks						
Step 1: Rating Official - Request or Doci		(if required)			Completed	
Step 2: Higher Level Reviewer - Review					Completed	
Step 3: Rating Official - Document Common Step 3: Rating Step 3	munication to Employee				completed	
Step 4: Employee - Acknowledgment				C	Completed	
Print Appraisal Form						
Print Appraisal Form						
						Go <u>B</u> ack

Figure 34 - Annual Appraisal>Approvals and Acknowledgments>Print Appraisal Form

24. You can open or save the DD Form 2906, for this scenario, select Save button.

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form		
Assessments and Ratings Approvals and Acknowledgments		
	-0	hoose an Action - 👻 🚺 😡
Employee Information		
Employee Name ENRIS Berraox, Wzhjikuw G ) Show Employee Details		
This screen provides information regarding the status of your Appraisal.		Need Help?
<ul> <li>Select 'Show' to see detailed information about an approval (dates, method, etc.).</li> </ul>		
X 2 6 0		
Show All Details   Hide All Details		
Oetaits Tasks		
Shep 1: Rating Official - Request or Document Higher Level Review (if required)     Shep 2: Higher Level Review (if required)	Completed	
Step 2: Higher Level Heviewer - Neview (if required)     Step 3: Rating Official - Document Communication to Employee	Completed	
Step 4: Employee - Acknowledgment     Step 4: Employee - Acknowledgment	Completed	
Print Appraisal Form	Combined	
Prest Appresail Form		
Print Appraisant Vitro		
		Go Back
	Π	
Do you want to open or save DoD_Apprelial.PDF from warfock.dcpds.cpms.eod.mil?	Open Save Cancel ×	Privacy Stateme

Figure 35 - Print Appraisal Form>Open-Save-Cancel DD Form 2906

25. Once the DD Form 2906 download has completed, you can select **Open**, **Open folder**, or **View downloads** button. Select the **Open** button, form will open as a .pdf file.

		- Choose an Action - 🕑 🛛 😡
Employee Information		
Employee Name DHRI's Burraok, Wahijkuw G Johow Employee Details		
This screen provides information regarding the status of your Appraisal.		Need Help?
<ul> <li>Select 'Show' to see detailed information about an approval (dates, method, etc.).</li> </ul>		
1 0 0 0		
Show All Details   Hide All Details		
letals Tasks		
Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	
Step 2: Higher Level Reviewer - Review (if required)	Completed	
Step 3: Rating Official - Document Communication to Employee	Completed	
Step 4: Employee - Acknowledgment Print Appraisal Form	Completed	
Pret Appraisal Form		
		Go Back
		Goljack
	п	Geged
		Ge Bar

Figure 36 - DD Form 2906>Open-Open Folder-View downloads

26. Close DD Form 2906 and select **Choose an Action** LOV drop down arrow depicted in the red box below. The only actions that are available are **Change Rating Official or Higher Level Reviewer, Transfer to Employee, Track Progress** and **Return to Main Page**. To return to *MyPerformance Main Page*, select **Return to Main Page**. Lastly select the **Go** button to the right.

Employee In							C	- Choose an Action Change Rating Official or Higher Transfer to Employee	r Level Reviewer
Employee Na Show Emplo	me EHRIS Bwraox, Wzhjkuw G oyee Details							Track Progress Return to Main Page	
									Need Help?
rogress revie	ews are conducted to assess employ rogress review.	ee's performance throughout t	the performance cycle. At least one progre	ess review is required and	I is typically conducted at the mid-p	point of the cycle. From this screen you ca	in create a progress review, update a pr	ogress review that has not been	n approved, and view
	•	Dronzasz Davinu' hutton							
To cre     To upo	ate a progress review, select 'Create date a progress review, select the 'Up	date' button under the Action	column.						
To cre     To upo	ate a progress review, select 'Create	date' button under the Action	column. the Action column.						
To cre     To up     To vie	ate a progress review, select 'Create tate a progress review, select the 'Up w a completed progress review, select	idate <sup>®</sup> button under the Action at "View History" button under t	the Action column.						
<ul> <li>To cre</li> <li>To up</li> <li>To vie</li> </ul>	ate a progress review, select 'Create tate a progress review, select the 'Up w a completed progress review, select	idate <sup>®</sup> button under the Action at "View History" button under t	column. the Action column. ally occurs midway through the performan	nce cycle. (Note: This doe	is not pertain to the narrative state	ements or annual appraisal.)			
<ul> <li>To cre</li> <li>To up</li> <li>To vie</li> </ul>	ate a progress review, select 'Create tate a progress review, select the 'Up w a completed progress review, select	idate <sup>®</sup> button under the Action at "View History" button under t	the Action column.	nce cycle. (Note: This doe	is not pertain to the narrative state	ements or annual appraisal.)		Create Progress Review	1 2 5 8
<ul> <li>To cre</li> <li>To up</li> <li>To vie</li> </ul>	ate a progress review, select 'Create tate a progress review, select the 'Up w a completed progress review, select	idate <sup>®</sup> button under the Action at "View History" button under t	the Action column.	nce cycle. (Note: This doe Status	is not pertain to the narrative state	ements or annual appraisal.)	Employee Ack Date	Create Progress Review	같고 5 호 Delete

Figure 37 - Choose an Action>Return to Main Page

27. The completed annual appraisal has been removed from the **Plans/Appraisals in Progress** area. An official copy of the DD Form 2906 was placed in **Completed Plans/Appraisals** found on the bottom of the **MyPerformance Main Page**. Select **Completed Plans/Appraisals** link.

MyPerformance Main Page Pro	ovide Guest Feedback										
Rating Official/Higher Level	Reviewer										
			My	Performance	Main Page						
										Nee	d Help?
Warning: This application is designed for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.											
From the Main Page, you can creat	te, update and view employee Performa	nce Plans; change the Rating Official	and/or Higher Level Revi	iewer; view and print	t part or an entire plan after it	t is created;	close a plan, and t	rack the status of a pla	n.		
You can also search for completed	plans by selecting the 'Show Complete	d Plans/Appraisals' link located at the I	bottom of this page.								
To create a Performance Plan:	To complete other actions	described above:									
<ul> <li>Select 'Choose a Plan Typ</li> <li>Select 'Appraisal Plan Typ</li> </ul>	e' .										
<ul> <li>Select the 'Go' button</li> </ul>	<ul> <li>Select the 'Go' but</li> </ul>	ton									
Important: To become familiar with	h the columns, select the 'Need Help?' I	nk.									
Plans/Appraisals In Progress											
Only Employees that have	a plan in progress are listed below.										
									Crea	te New Plan	
Show Me All Appraisals	Appraisal Year ALL	•						Choos	e a Plan Type	~	Go
Records Displayed	a 2 🗅 🕸									4 Previous 10 21-23 0	123 🔽 Next ⊧
Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID 🛆	Plan Approval Date	Туре 🛆	Plan Status 🛆	Current Status	Action		
CPMS Czajkowski, Courtney W	EHRIS Yzqfotzfz, Nvmuyezct Z	EHRIS Yzqfotzfz, Nvmuyezct Z	2017	345		DoD	Pending	Plan in Progress	Update	~	Go
EHRIS Clkutmuxe, lajvsft	EHRIS Yzqfotzfz, Nvmuyezct Z	EHRIS Yzqfotzfz, Nvmuyezct Z	2017	299		DoD	Pending	Plan in Progress	Update	~	Go
CPMS Lacosse, Addie R	EHRIS Yzqfotzfz, Nvmuyezct Z	EHRIS Yzqfotzfz, Nvmuyezct Z	2017	354		DoD	Pending	Plan in Progress	Update	~	Go
Select the link to search for Comple >Show Completed Plans/Appraisa	eted Plans.										
Select the link to search for Compl >Show Completed Plans/Appraisa	eted Plans.										

Figure 38 - MyPerformance Main Page>Completed Plans/Appraisals

28. You can enter Employee Name, Appraisal Year and/or Event. Select Event down arrow to select the appropriate event you want displayed. For DoD Performance Management Appraisal Program, you will need to select **DoD Performance Plan**, **DoD Narrative Statement**, **DoD Annual Appraisal**, **DoD Progress Review**, or **DoD Performance Plan – Modified**. To Find Employee's 2017 DoD Annual Appraisal, fill out information and select **Find** button.

Select the link to search for Co AHide Completed Plans/Appra	mpleted Plans. isals					
Completed Plans/Appraisals	5					
1. Begin with entering search 2. Select the 'Find' button. Yo	o criteria. The followin our results will be bas	g fields can be enter ed on your search cr	ed in any combin iteria.	ation; e.g., Employee Nan	te only, Employee Name and Apprais	raisal Year, etc. Select the search icon for assistance in entering the Employee Name.
				Employee Name Appraisal Year Event		
Records Displayed 10 Employee Name No search conducted.	Appraisal Year	Appraisal ID	Type Ev	ent Event Completion	Date Reports/Forms	5
						DOD Performance Plan Dod Narrative Statement Dod Annual Aperataal Dod Progress Review DoD Performance Plan - Modified DCIPS Performance Plan - Modified DCIPS Performance Plan - Modified NC Performance Plan - Modified NC Closecut Assessment NC Closecut Assessment NC Closecut Assessment NC Interim Review NC Performance Plan - Modified

Figure 39 - MyPerformance Main Page>Completed Plans/Appraisals

29. Select the Printer icon to open or save the DD Form 2906.

Select the link to search for Completed Plans. ⊿Hide Completed Plans/Appraisals Completed Plans/Appraisals									
1. Begin with entering search criteria. The following fields can be entered in any combination; e.g., Employee Name only, Employee Name and Appraisal Year, etc. Select the search icon for assistance in entering the Employee Name. Employee Name. 2. Select the 'Find' button. Your results will be based on your search criteria.									
		Employee Name EHF	RIS Bwraox, Wzhjki	uw G🔍					
		Appraisal Year 201	17 🗸						
		Event Do	D Annual Appraisa	al 🗸					
(Find) Clear									
Records Displayed 10 🗸	( C 🕞 🔅								
Employee Name	Appraisal Year 🛆	Appraisal ID	Туре 🛆	Event	Event Completion Date	Reports/Forms			
EHRIS Bwraox, Wzhjkuw G	2017	180	DoD	DoD Annual Appraisal	31-Mar-2017				

Figure 40 - MyPerformance Main Page>Completed Plans/Appraisals>Reports/Forms

## 30. Select **Open** or **Save** button. The **Save** button will Save, Save as, or Save and Open.

Do you want to open or save DoD_Appraisal.PDF from warlock.dcpds.cpms.osd.mil?	Open	Save 🔻	Cancel	×

Figure 41 - Do you want to open or save DoD\_Appraisal.PDF?