How to Create a Progress Review

- 1. This guide gives instructions on how either the employee or the Rating Official (RO) can create the Progress Review. Whomever creates the Progress Review must have possession of the plan.
- 2. On the employee's or RO's MyPerformance Main page, choose "Update" on the drop down menu for the employee's plan you want to create a Progress Review for and click on the <Go> button to open the plan.

MyPerformance Main Page Provid	e Guest Feedback										
Rating Official/Higher L	evel Reviewer										
				MyPe	erformance Main Pa	ge					
										Need	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 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 p	ans by selecting the 'Show	w Completed Plans/Appraisals' lir	nk located at the bottom o	f this page.							
To create a Performance Plan:	To complete o	ther actions described above:									
 Select 'Choose a Plan Type' Select 'Appraisal Plan Type' 	 Select 	an option from the Action column	i i i i i i i i i i i i i i i i i i i								
Select the 'Go' button	 Select 	the 'Go' button									
Important: To become familiar with t	he columns, select the 'Ne	eed Help?' link.									
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	i pian in progress are liste	d below.							Create New Plan		
Show Me All Appraisals	 Appraisal Year 	ALL 🔽							Choose a Plan Type	~	Go
Records Displayed 10 V	2 🖻 🔅 🔻 🎟										Rows 1 to 1
Employee Name △	Current Owner 🛆	Rating Official Name 🛆	Appraisal Year 🛆	Appraisal ID 🛆	Plan Approval Date 🛆	Туре 🛆	Plan Status 🛆	Current Status △	Action		
ARM Happyfom, Nyxsoup R.	Neall, Barbara	Neall, Barbara	2018	677	12-Dec-2017	DoD	Modified	Plan Approved	Update	~	Go
ARM Hnygs RJ, Ojgsaj W	Neall, Barbara	Neall, Barbara	2018	676	25-Jan-2018	DoD	Approved	Progress Review Comple	Update	~	Go
ARM Kaoxqumzahs, Jizujg Zujje	Neall, Barbara	Neall, Barbara	2019	674	17-Jan-2018	DoD	Approved	Narrative Statement in P	Update	~	Go
ARM Lugje, Xsjyhgo P	Neall, Barbara	Neall, Barbara	2018	614	18-Oct-2017	DoD	Approved	Narrative Statement Con	Update	~	Go
ARM Quup, Kaymgim J.	Neall, Barbara	Neall, Barbara	2018	585	07-Mar-2018	DoD	Approved	Plan Approved	Update	~	Go
Stapula, Priscilla Leigh	Neall, Barbara	Neall, Barbara	2018	454	30-Dec-2016	DoD	Approved	Progress Review in Prog	Update	~	Go
Stapula, Priscilla Leigh	Neall, Barbara	Neall, Barbara	2017	370	16-Mar-2017	DoD	Approved	Progress Review in Prog	Update	~	Go
ARM Hluuxu, Zugsuo M	Neall, Barbara	Neall, Barbara	2018	320	04-Sep-2017	DoD	Modified	Plan in Progress	Update	~	Go
ARM Duzzuj, Xsojpuh R	Neall, Barbara	Neall, Barbara	2018	312	25-Oct-2017	DoD	Approved	Plan Approved	Update	~	Go
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3. With the plan open, click on the "Progress Review" tab

DoD Performance Management Appraisal Program		MyBiz+ Help Logg	ged In As 11ITE ST40 Logout
Pun Progress Reviews Aprilual 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 A	cknowledgments		
Employee Information		Choose an Action	♥ Go
Employee Name ARM Quup, Kaymgim J. Show Employee Details			
This screen allows you to view and change the details of your employee's performance plan. Step 1: Plan Details • Verify the appraisal dates and higher level reviewer name is correct, and, if applicable, make the necessary change • Select Save and Continue button at the bottom right corner to move to Step 2: Mission Goals. TIP: Choose an Action – located at the top right corner – allows for selection of other actions throughout the performance of			
For additional guidance, select. Need Help? * Appraisal Type Annual Appraisal - DoD Performance Plan Approval Date * Appraisal Period Start Date (dd-mmm-yyy) * Appraisal Period End Date (dd-mmm-yyy) * Appraisal Effective Date (dd-mmm-yyy) (dd-mmm-yyy) (dd-mmm-yyy)			
Rating Official Name Neall, Barbara Higher Level Reviewer Stapula, Priscilla Leigh			Save and <u>C</u> ontinue
			Privacy Statement

4. Click on the <Create Progress Review> button. If there is no <Create Progress Review> button, or if the button is greyed out, that means the plan is not in an "Approved" status and must be approved, or re-approved if a modification was made after it was initially approved.

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Employee Information	Plan Progress Reviews	Annual Appraisal Na	rrative Statements View/P	rint Form Manage Guest Participants								
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	Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ac	k Date	Action	Delete	
Privacy Statement	No results found.											
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5. The Progress Review has now been created and the next step is for the employee to input their comments on the Progress Review for each performance element before the RO inputs their assessment. So if the RO created the progress review, the RO should click on the <Go Back to Progress Reviews> button to go back to the Progress Reviews tab in order to transfer the plan to the employee. If the employee created the progress review, then the employee should skip to Step 7 of this guide and start inputting their comments.

Progress	Reviews	Information area										
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0	2	Provide Reports	Approved	Critical								
0	3	Evaluate Training	Approved	Critical								

6. If the RO created the progress review, and clicked on the <Go Back to Progress Reviews> button, then when the RO is back at the Progress Review tab, they would click on the drop down menu on the right side of the screen and choose "Transfer to Employee".

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Employe	e Information		nents View/Print Form Manage Guest Pa	rticipants			Change R	an Action – ating Official or Higher o Employee gress Main Page	Level Reviewe	Go	
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Number	Created By Neall, Barbara	Creation Date 21-Aug-2018	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete		
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Once the employee has possession of their plan and it is open, they would click on the "Progress Review" tab. Then they would click on the "Update" button.

	DoD Performance Management Appraisal Program											
Plan Progres	s Reviews Annual	Appraisal Narrative State	ements View/Print Form Manage Guest Pa	rticipants								
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Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Anti-	Dele	te		
1	Neall, Barbara	21-Aug-2018		Initiated				Updat	e 🗎			
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- 9. If the employee wants to provide comments on any or all of their performance elements for the Progress Review, they would do so on the "Assessments" tab of the Progress Review which is shown by default when the Progress Review is opened.
- 10. The employee would then click on the radio button for each of the performance elements, and enter their comments in the "Employee Input" block. By clicking on the <Go to Next Performance Element> button after entering their comments, this saves their comments on that element, and moves to the next element automatically so that they can add comments on the next element. They can also click on the <Go Back to Top of Page> button which will scroll back to the top of the page.

essments	Approva	Is and Acknowledgments								
This screen allows you to view your employee's performance elements and standards and input and enter your assessments.										
 Select Radio button next to the performance element and standard(s) you want to view and enter assessments. Select Go to Next Performance Element button at bottom right corner to go to the next performance element and standard(s). 										
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	Order	Performance Element Title	Status	Performance Element Type						
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0	2	Provide Reports	Approved	Critical						
0	3	Evaluate Training	Approved	Critical						
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of th	ne fiscal vear	idance, develop and recommend one feasible alterna . The recommendations should be unique from other	r existing solutions and be able to r	meet projected data storage needs over the next						
three	e years. Tha	t is, it should enhance the organization's ability to eff is in a briefing following the standard organizational	ficiently manage, organize, and sto format. Give a draft to your supervi	re increasing amounts of data. Present						
date	and incorpo	brate supervisor's feedback into the final briefing by t	he end of the fiscal year.	sor at least the month in advance of the due						
nploy	ee Input)								

11. Once the employee is done entering their comments, they would click on the <Go Back to Progress Reviews> button to get back to the

of the Progress Review.

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12. The employee would then click on the "Transfer to Rating Official" from the drop down menu under "Choose an Action" on the right hand side of the screen.

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Employee	Annual / Information me Neall, Barbara	Appraisal Narrative State	ments View/Print Form			<u> </u>	Change F Transfer t Track Pro	an Action tating Official or Higher o Rating Official gress Main Page	Level Reviewer	Go
This screen al • Select • Select • Select	Create Progress Revie Update button under A	w button to create a progre ction column to update a p der Action column to view a	gress reviews. Progress Reviews are performat iss review. ogress review. a completed progress review.	nce discussions that r	nust be documented in the MyPerfo	rmance tool. Employees must have at least on	e documented progress review which typic	ally occurs midway throi	ugh the perform	ance cycle.
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Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete	
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- 13. When the RO has possession of the plan, they should follow the steps in #8 of these instructions to fill in the Rating Official Assessment block for each performance element they wish to provide comments on.
- 14. Once the employee transfers the plan to the Rating Official, and the RO has possession of it, the Rating Official would use the same steps (See steps 8 thru 10) to open the Progress review, go to the "Assessments" tab, and input any comments they wish in the "Rating Official Assessment" block of the performance elements, and click on the <Go To Next Performance Element> button, which saves their comments on that element, and moves to the next element to add comments. They can also click on the <Go Back to Top of Page> button which will scroll back to the top of the page.

	Perf	Performance Element and Standard(s)	
		With minimal guidance, develop and recommend one feasible alternative process or long-term solution to recurring server-limitation problems by the end of the fiscal year. The recommendations should be unique from other existing solutions and be able to meet projected data storage needs over the next three years. That is, it should enhance the organization's ability to efficiently manage, organize, and store increasing amounts of data. Present recommendations in a briefing following the standard organizational format. Give a draft to your supervisor at least one month in advance of the due date and incorporate supervisor's feedback into the final briefing by the end of the fiscal year.	
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		(Limit to 2000 characters) Spell Check Counter 188	
			Go to Next Performance Element Go Back to Top of Page

15. Once the Rating Official has entered comments on the performance elements, they should click on the "Approvals and Acknowledgements" tab to start the approval process.

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	is 🍄 ▼ 🖩 Order	Performance Element Title	Status	Performance Element Type								
0	1	Provide Long Term Solutions	Approved	Critical								
0	2	Provide Reports	Approved	Critical								
:0:	3	Evaluate Training	Approved	Critical								

16. This process is the same as the approvals process for the plan, so the Rating Official would complete the steps to approve the Progress Review.

This screen allows you to start the approval and/or communication process or view status information of the employee's progress review. Select Show All Details link to see starbus information (date, method, etc.) and Hide All Details link to collapse all steps. Select Starb Uution under Action column for Steps 1 (if required) or 3, if available. Select G Back to Progress Reviews button at top right corner to go back to Progress Reviews page. For additional guidance, select Need Help? Show All Details [Hide All Details] Details Tasks Status Action Step 1: Rating Official - Request or Document Higher Level Review (if required) Not Started Not Started Step 2: Higher Level Reviewer - Review (if required) Not Started Step 3: Rating Official - Document Employee Acknowledgment Not Started Not Started Step 4: Rating Official - Document Employee Acknowledgment Not Started Not Started Step 3: must be/completed			Perform isal Pro	ance Management gram					MyBiz+ Help Log
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Step 3: Rating Official - Document Communication to Employee Not Started Start Image: Step 4: Rating Official - Document Employee Acknowledgment Not Started Step 3 must be completed	► St	ep 1: Rating Official -	Request or Docu	ment Higher Level Review (if required)		Not Started	Start		
Step 4: Rating Official - Document Employee Acknowledgment Not Started Step 3 must be completed	St	ep 2: Higher Level Re	viewer - Review ((if required)		Not Started	Not Started		
	▶ St	ep 3: Rating Official -	Document Comm	nunication to Employee		Not Started	Start		
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