



Enterprise Human Resources Information Systems (EHRIS)

User Guide

MyPerformance (DoD Performance Management and Appraisal Program)

Rating Officials Guide (Supervisors and Managers)

March 7, 2016

Serving Those Who Serve Our Country

Table of Contents

Table of Contents	2
Getting Started - About DoD Performance Management Appraisal Tool	3
Accessing the DoD Performance Management Appraisal Tool	3
DCPDS Portal	3
Rating Officials (Managers and Supervisors) Accessing MyPerformance.....	5
Table 1 – <i>Create Performance Plan</i> page - Setup Details fields and descriptions	8
Table 2 - Performance Element and Standards Fields and Descriptions	11
Table 3 – Decision Table for Performance Elements	12
Performance Plan: Editing the Plan (Rating Official)	16
Table 4 – Decision Table for use when editing Performance Elements and Standards.....	20
Performance Plan: Approving the Plan (Rating Official).....	21
Table 5: Plan Approval Steps.....	22
Table 6 – Documenting the Higher Level Reviewer Process	27
Table 7 – Documenting communication with the employee	28
Table 8 – Documenting the employee’s acknowledgement	32

Getting Started - About DoD Performance Management Appraisal Tool

MyPerformance helps employees and rating officials manage performance. The tool streamlines and automates performance management processes and documentation requirements to make it easier and more efficient to track and monitor performance.

If you are new to the *MyBiz+* self-service tool, pages 2 and 3 provide screen shots and descriptions of the information on the screens to help in familiarizing you with the tool. However, should you wish to get started right away, go directly to page 4 and start with ‘Creating a Performance Plan (Rating Official)’.

Accessing the DoD Performance Management Appraisal Tool

To access the DoD enterprise suite of Human Resources (HR) tools every user must enter the portal. The information provided below directs the user to the portal link and walks the user through the access process with follow-on directions to the DoD Performance Management Appraisal Tool.

DCPDS Portal

To access *MyPerformance*, you must first log in to the *DCPDS Portal* at <https://compo.dcpds.cpms.osd.mil> using your *Smart Card* (CAC/PIV) or non-Smart Card (non-CAC User ID) and password. From there you will be directed to *MyBiz+*. The **Performance Management and Appraisal** link is located in *Key Services*.

Log on with your [Smart Card](#) (CAC/PIV) or non-Smart Card (non-CAC User ID) and password using the applicable login button on the *DCPDS Portal* page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.

Login Help | Contact List | Frequently Asked Questions (FAQ)



DCPDS PORTAL



News and Info

Last updated January 11, 13:00 CDT

The Department of Defense (DoD) is the U. S. CENTCOM Civilian Personnel Data System (DCPDS) have to offer are represented by the Department of Defense (DoD) and the U. S. CENTCOM Civilian Personnel Data System (DCPDS).

The added value for employees is to participate in a diverse workforce and make a difference in the Department of Defense (DoD).

Thank you for all of your feedback. We will continue to value your input to enhance MyBiz+.

Attention CSU Users: The CSU application and database will be decommissioned in the near future. Data has been transitioned to the Current Record Data Mart in CMIS. DLA/DLA customer CSU users will no longer have access to CSU as of June 30, 2016. This notice will be updated with dates for other agencies as they are announced.

Component Help Desk Information

If you are having problems accessing this site, please select [Contact List](#) to locate and directly contact your Component Help Desk.

For additional information, check out our [Frequently Asked Questions \(FAQ\)](#).

Smart Card Access

Click the login button below and select your non-email digital certificate.



First time Smart Card (CAC) user? [Register Here](#)

Returning Non-Smart Card (Non-CAC) User? Click the button below.



First time Non-Smart Card (Non-CAC) user? [Register Here](#)
 Password problems? [Reset](#)

For technical problems, select the [Contact List](#) for your organization's computer support Help Desk.

Windows Security

Select a Certificate

	Issued: DOD EMAIL, CA-31 Valid From: 6/21/2015 to 6/21/2018
	Issued: DOD CA-31 Valid From: 6/21/2015 to 6/21/2018 Click here to view certificate properties...

OK Cancel



Figure 1 - DCPDS Portal Login Page - Certificate Selection

Read the **Privacy Act Statement** and select the **Accept** button.

Privacy Act Statement

The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office.

Authorities: 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, volumes 1100 and 1401; 29 CFR 1614.601; and E.O. 9397.

Principal Purposes: To allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal information.

Routine Uses: None. The DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system.

Disclosure: Voluntary. However, failure to provide or update your information may require manual HR processing or the absence of some information.

Accept

Accessibility/Section 508 | Privacy and Security Policy | System Help Desk Contacts

Figure 2 - Privacy Act Statement

Rating Officials (Managers and Supervisors) Accessing MyPerformance

From the *MyBiz+* home page under **Manager Functions** in **Key Services**, select the **Performance Management and Appraisal** link.

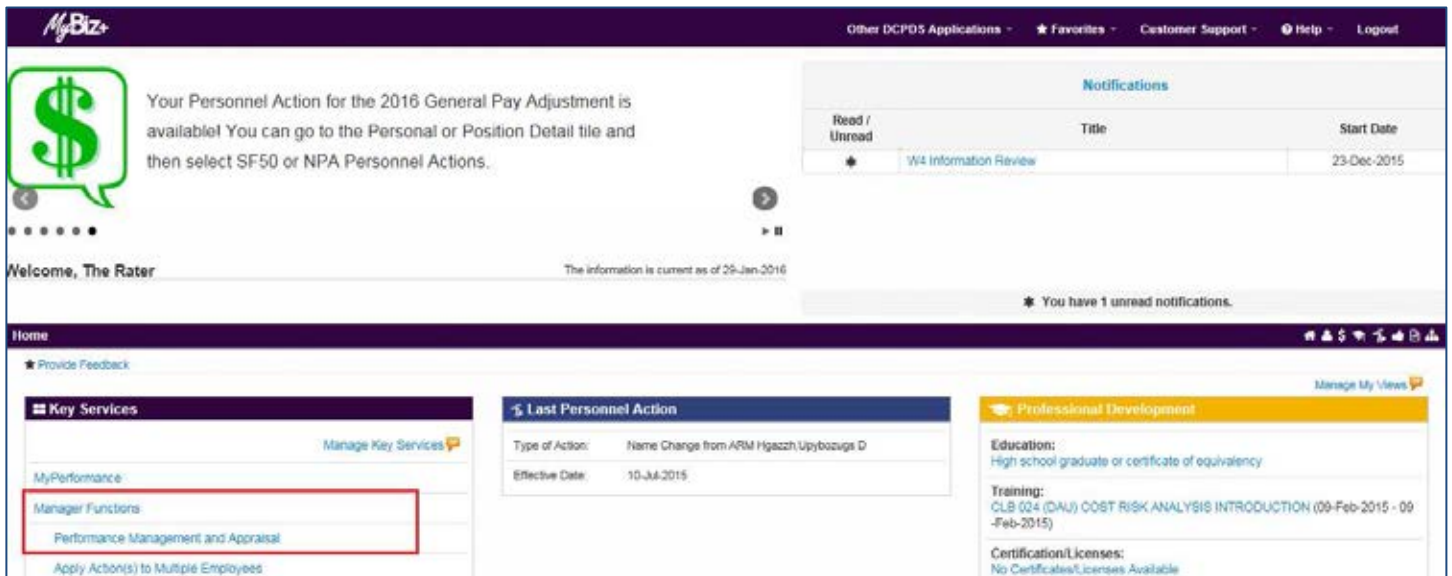


Figure 3 - *MyBiz+* Home Page identifying Performance Management and Appraisal

You are now on the *MyPerformance* Main Page where you can create, update, and view your employees' performance plans.

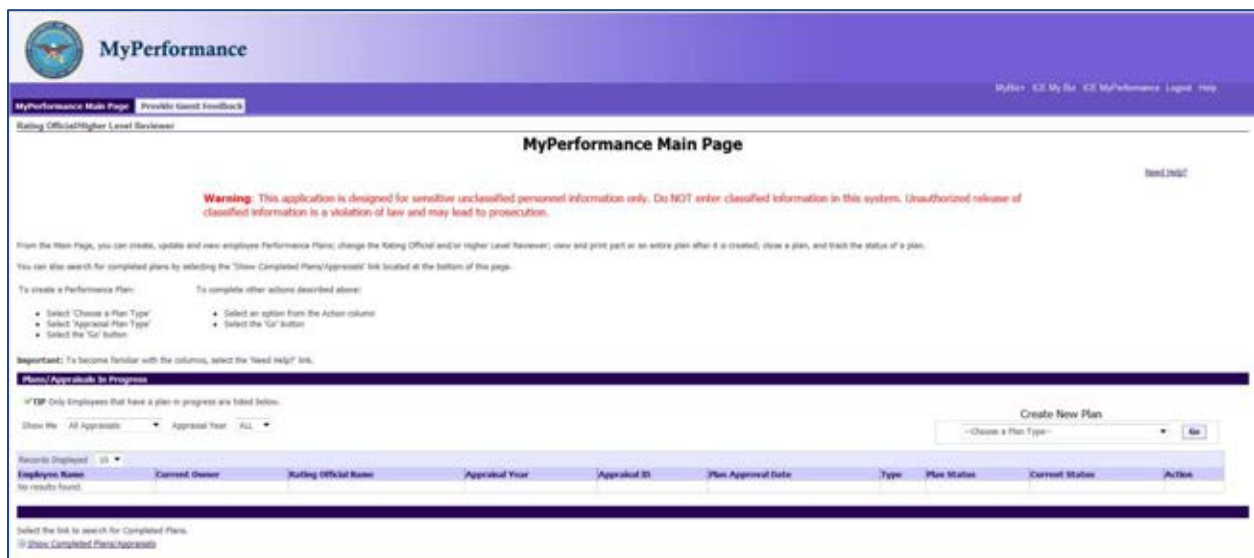


Figure 4 - MyPerformance Main Page

Performance Management Appraisal Procedures for Rating Officials

This section focuses on your use of the system as a rating official and details how to use the Performance Management and Appraisal system to initiate, edit, view, and approve the performance plans of employees.

At the beginning of the rating cycle (normally April 1), you or your employee initiate a new performance plan. This is done for each employee you are responsible for rating. A new performance plan will be created in the middle of the cycle if a new employee is hired.

Performance plans include a maximum of ten performance elements and related performance standards. All elements are critical. You must have a minimum of one critical performance element.

There are two approaches to creating a performance plan:

- Notify your employee that you would like him or her to create the plan; or
- Create the plan for your employee.

In either case you should communicate with your employee about which option you choose, and what you expect if your employee is to create it. This is particularly important to avoid rework if your employee creates the plan and enters data that is incorrect or not what you expect. If you ask your employee to create the plan and enter performance elements, you must ensure he or she knows the relevant organizational mission/strategic goals.

Regardless of who initiates the performance plan, it can be left as an empty shell, in which the other party enters the objectives, or the person creating it can enter initial objectives. After the performance plan has been initiated, you and your employee can enter, edit, or review performance elements as much as needed before the final transfer from the employee to you for approval.

Performance Plan: Creating the Employee Plan (Rating Official)

Follow these steps to create a performance plan for your employee.

1. On *MyPerformance Main Page* create a new performance plan by selecting ‘DoD Performance Management Appraisal Program’ from the **Choose a Plan Type** drop-down menu depicted in Figures 5 and 6.



Figure 5 - MyPerformance Main Page

2. Select the **Go** button to navigate to the *People in Hierarchy* page.

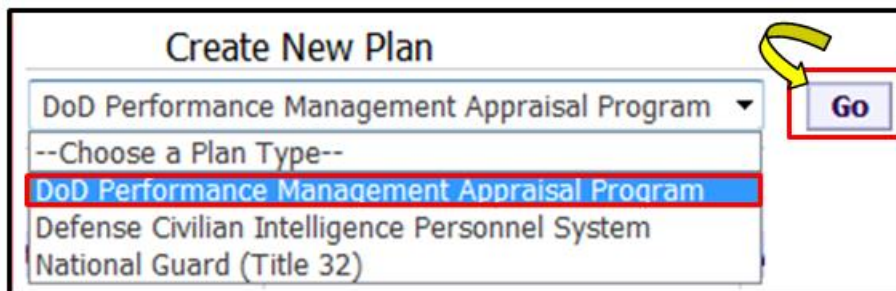


Figure 6 - Create New Plan List of Values

3. The *People in Hierarchy* page allows you to see your employees. Select the employee for whom you want to create a performance plan and select the **Create** button.



Figure 7 - People in Hierarchy Page

4. When a rating official creates a new performance plan, the rating official must acknowledge (using **Acknowledge** button) that he or she has read and acknowledges their role and responsibilities during the appraisal period each time before working in MyPerformance. Select the **Acknowledge** button.



Figure 8 - Acknowledgement Page

5. The *Create Performance Plan* page is displayed. Review **Setup Details** and, if needed, make required changes.

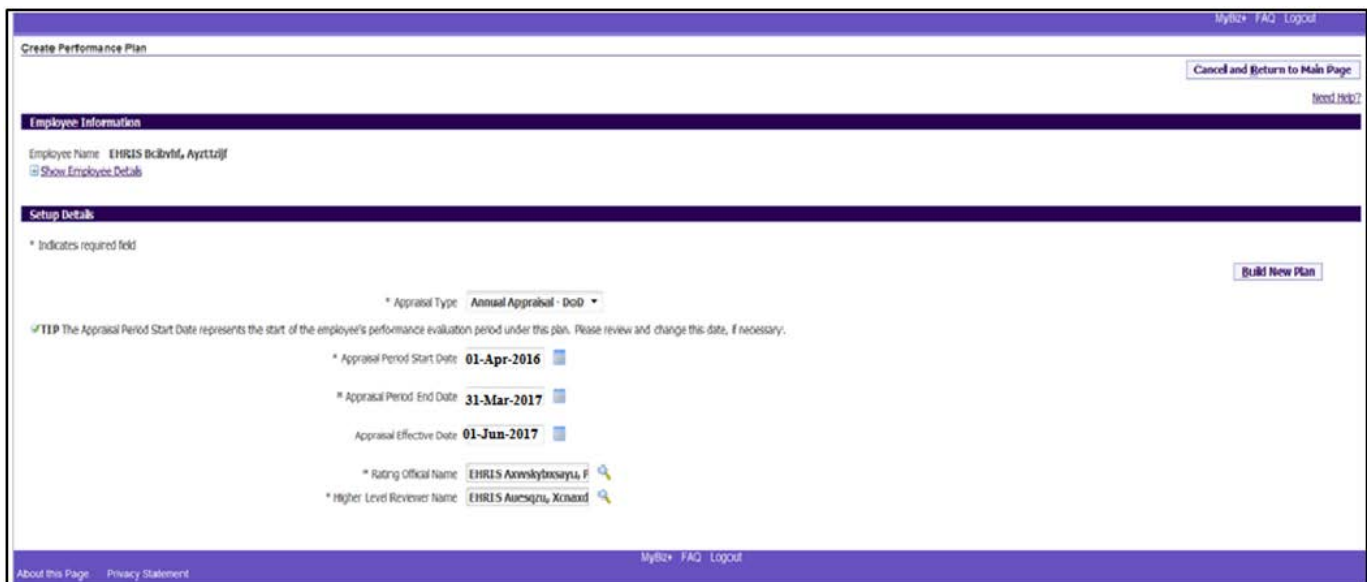


Figure 9 - Create Performance Plan Page

Table 1 – Create Performance Plan page - Setup Details fields and descriptions

This table provides a description of each of the **Setup Details** area fields.

Field	Description
*Appraisal Type	The Annual Appraisal – DoD option appears by default.
*Appraisal Period Start Date	The cycle start date defaults to 01-Apr-YYYY
*Appraisal Period End Date	The cycle end date defaults to 31-Mar-YYYY
Appraisal Effective Date	The appraisal effective date defaults to 01-Jun-YYYY
*Rating Official	This field is auto-populated based on information stored in the hierarchy
Higher Level Reviewer Name	This field is auto-populated based on information stored in the hierarchy, but can be changed as necessary

6. Select the **Build New Plan** button to go to the *Plan > Step 1: Plan Details* page.

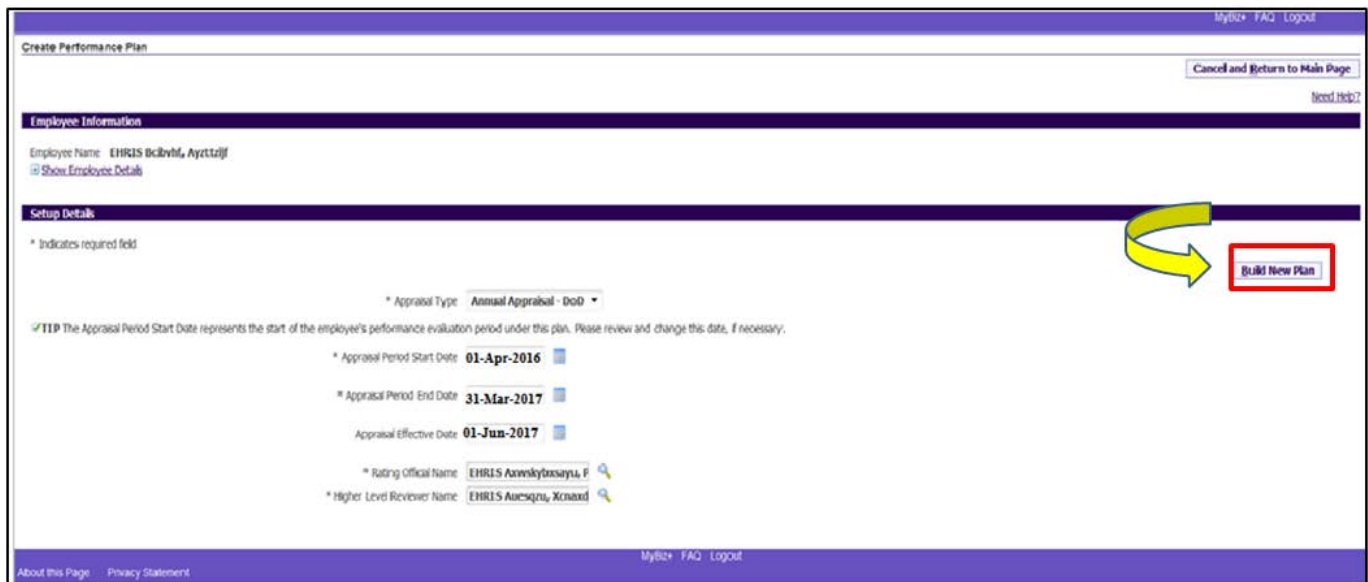


Figure 10 - Create Performance Plan Page

7. The *Step 1: Plan Details* page is displayed. On this page you can review your employee's information to ensure it is correct. If not correct, make the necessary changes. If you need help on this page, select the **Need Help?** link. The DoD Performance Management and Appraisal Program is tab-driven. You can use the tab navigation to go to another part of the performance plan (i.e., Mission Goals, etc.) or select the **Save and Continue** button to save the information and go to the next tab.

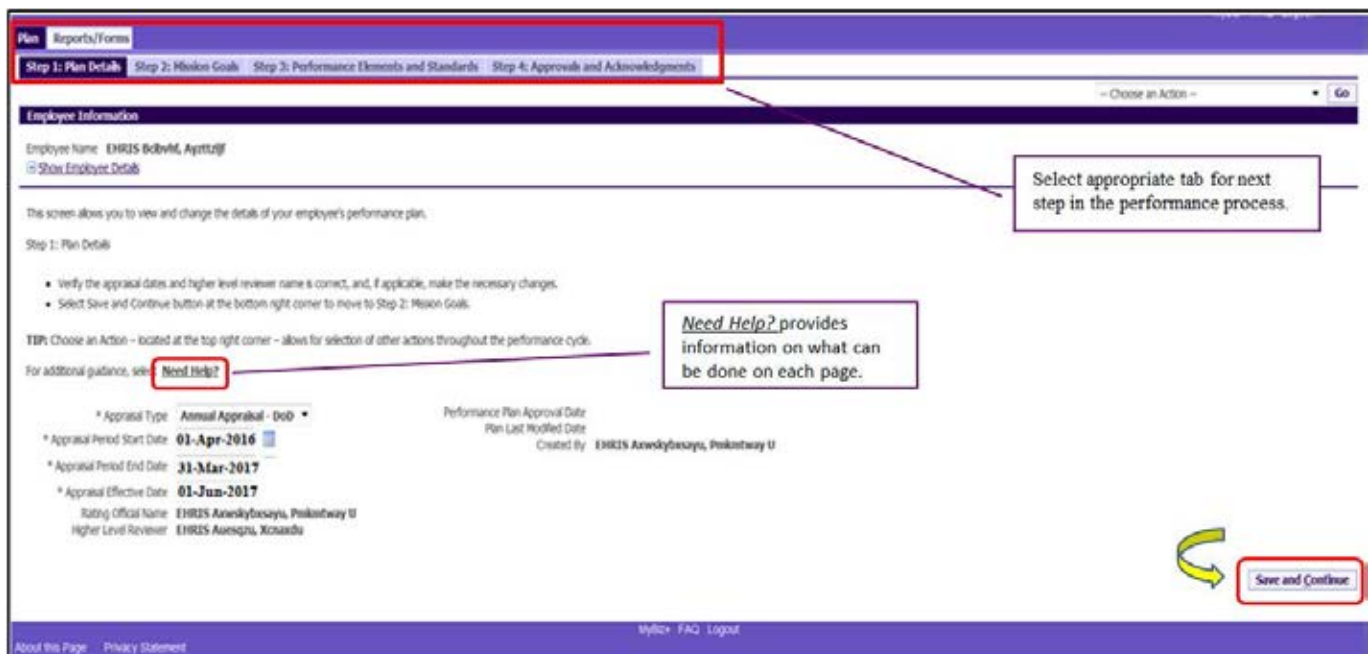


Figure 11 - Plan > Step 1: Plan Details

8. The *Step 2: Mission Goals* page is displayed. Enter your organization’s goals so they align with your employee’s performance elements and standards and select the **Save and Continue** button. If you want to go back to *Step 1: Plan Details*, select the **Save and Go Back** button.

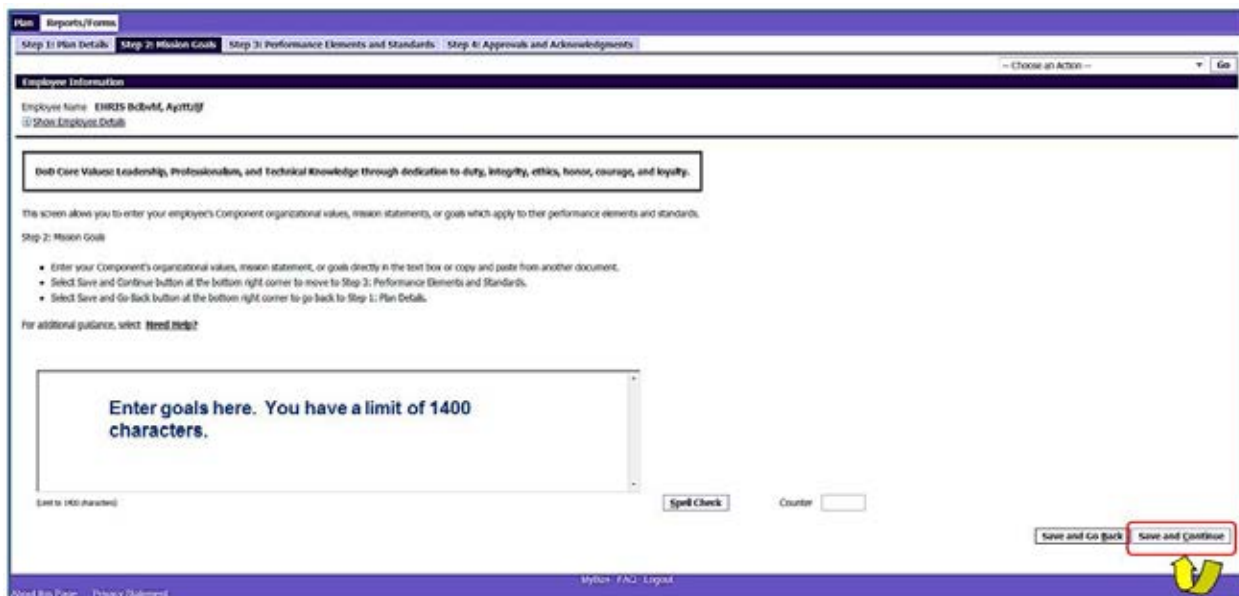


Figure 12 - Plan>Step 2: Mission Goals

9. The *Step 3: Performance Elements and Standards* page is displayed. To add a performance element, select the **Add Performance Element** button.

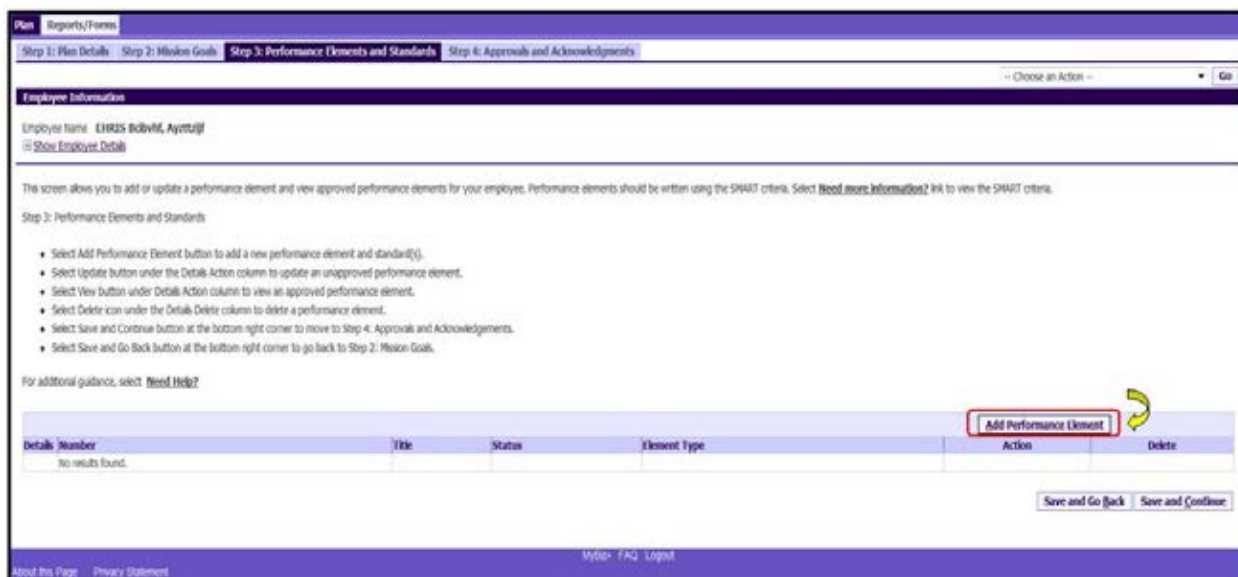


Figure 13 - Plan>Step 3: Performance Elements and Standards

10. The *Add Performance Element and Standard(s)* page is displayed. The asterisk (*) on the page indicates that the field is required.



Figure 14 - Add Performance Element and Standards Page






Table 2 - Performance Element and Standards Fields and Descriptions

The table below provides a description for each of the performance elements and standards fields. You will need to fill in the following fields:

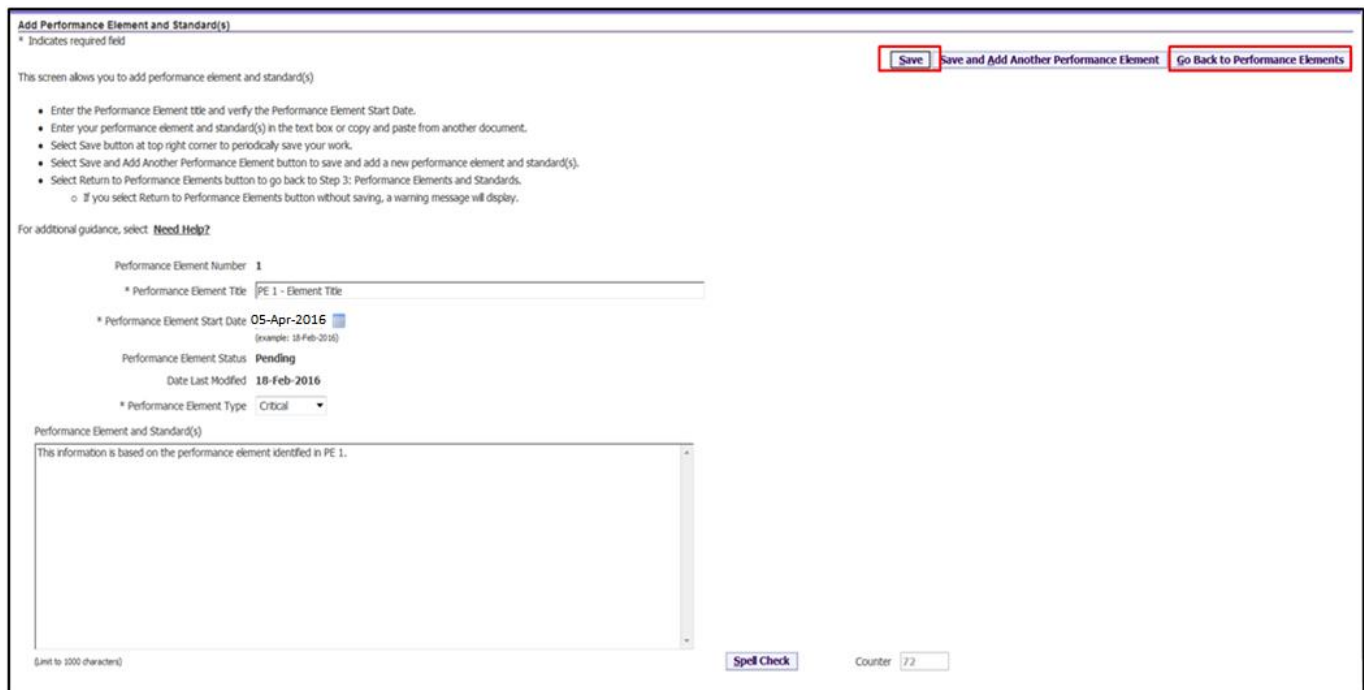
Field	Description
*Performance Element Title	Give a brief description of the performance element. You may enter up to 80 characters
*Performance Element Start Date	This field defaults to the current date. Normally it should be the same as the Appraisal Period Start Date on the <i>Create Performance Plan</i> page, but it may be different if a performance element does not become active until a later date due to an anticipated change in your job responsibilities.
*Performance Element Type	This field defaults to Critical
*Performance Element and Standard(s)	Give a detailed description of the performance element. Performance elements and standard(s) should be specific, measurable, aligned, realistic, and timed (SMART). The character limit for this field is 1,000. An employee can have no more than 10 performance elements.

Table 3 – Decision Table for Performance Elements

The table below provides direction based on the scenario indicated. Take the appropriate action based on the ‘If You...’ scenario, using one of the following options:

If You....	Then.....
Want to cancel the work that has been created so far	Select the Go Back to Performance Elements button  You will receive a warning message asking if you want to save the changes. Select No button.
Want to save performance element with all required fields entered and add another performance element	Select Save and Add Another Performance Element button 
Want to save the work periodically on the same page	Select Save button 
Finished adding performance elements and want to return to the <i>Performance Elements and Standards</i> tab	Select Save button and then select the Go Back to Performance Elements button  

11. Select the **Save** button and then the **Go Back to Performance Elements** button when you have completed entering the performance elements.



Add Performance Element and Standard(s)
 * Indicates required field

This screen allows you to add performance element and standard(s)

- Enter the Performance Element title and verify the Performance Element Start Date.
- Enter your performance element and standard(s) in the text box or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save and add a new performance element and standard(s).
- Select Return to Performance Elements button to go back to Step 3: Performance Elements and Standards.
 - If you select Return to Performance Elements button without saving, a warning message will display.

For additional guidance, select [Need Help?](#)

Performance Element Number **1**

* Performance Element Title

* Performance Element Start Date **05-Apr-2016**
(example: 18-Feb-2016)

Performance Element Status **Pending**
 Date Last Modified **18-Feb-2016**

* Performance Element Type **Critical**

Performance Element and Standard(s)
 This information is based on the performance element identified in PE 1.

(Limit to 1000 characters)

Save **Save and Add Another Performance Element** **Go Back to Performance Elements**

Spell Check Counter

Figure 15 - Add Performance Element and Standards Page

12. Since performance elements have been added, you can update, add, or delete a performance element as depicted in Figure 17.



Figure 16 - Plan > Step 3: Performance Elements and Standards

13. You can review all the information you have entered on the performance plan before transferring it to your employee for review.

- To view an individual performance element, select **+Show**. To collapse the performance element, select **-Hide**. This function is available throughout the application.

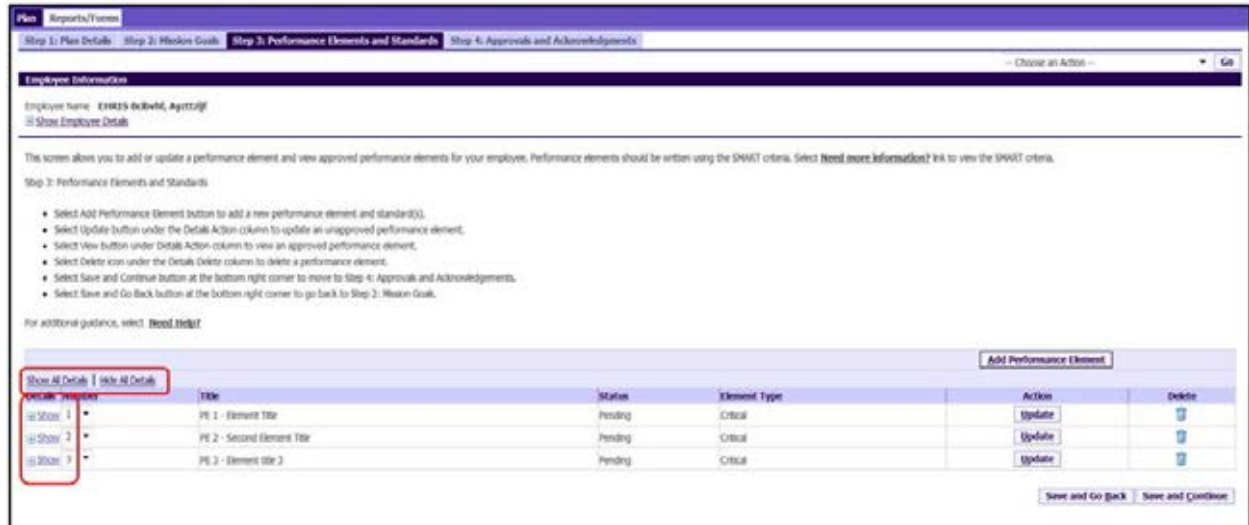


Figure 17 - Plan > Step 3: Performance Elements and Standards

- To view all details of employee’s performance elements, select **Show all Details**. To collapse, select **Hide all Details** link.

14. At this point you have completed your employee’s plan and are ready to transfer it to the employee for review. Select **Transfer to Employee** under the **Choose an Action** drop-down menu in the top right corner of the page.

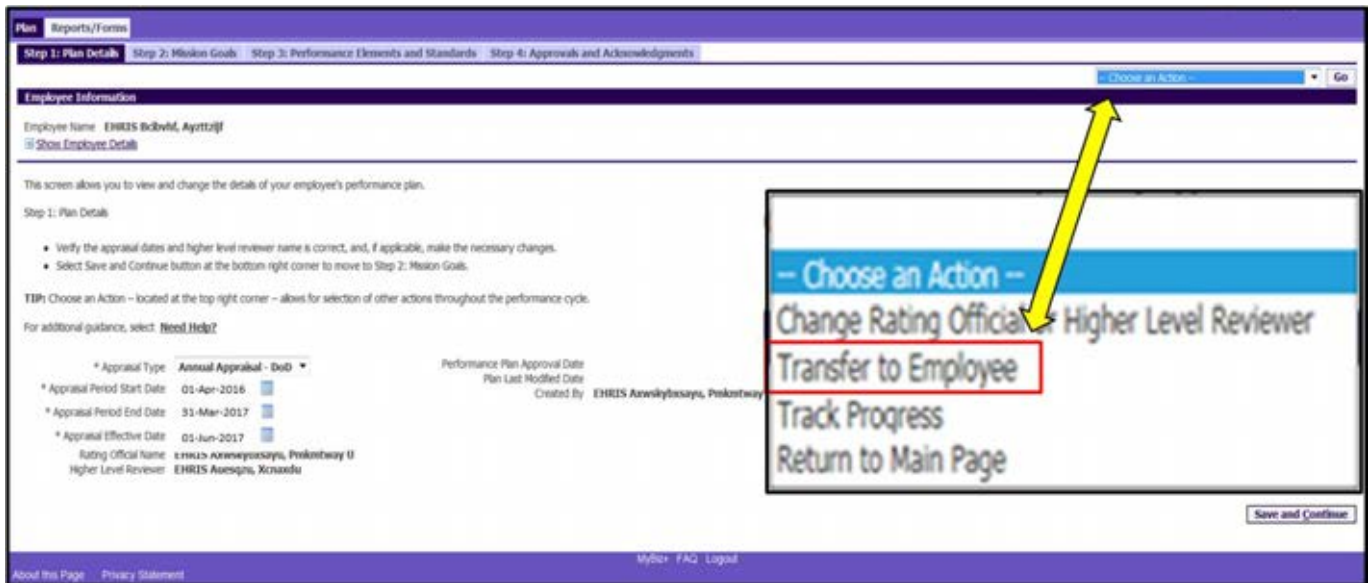


Figure 18 - Plan>Step 1: Plan Details

15. The *Rating Official Notification to Employee* is displayed. You have the option to transfer to the employee with or without e-mail notification. If you choose to enter comments in the Message to employee, your message will show up in the e-mail. Select **Transfer to Employee without E-mail Notification** or **Transfer to Employee with E-mail Notification** button to transfer the performance plan to your employee.

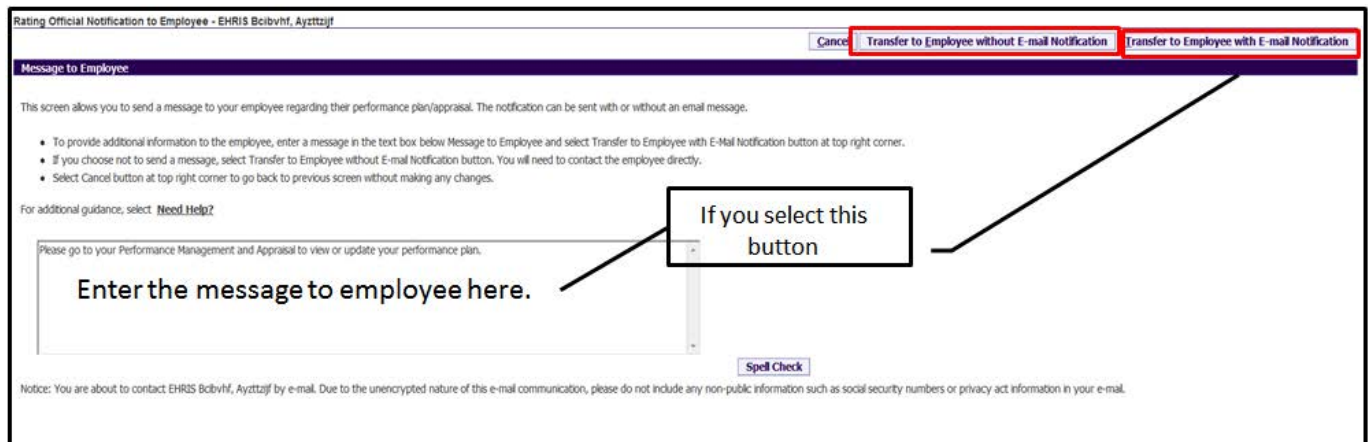


Figure 19 - Rating Official Notification to Employee

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+.

16. You will be navigated to the *MyPerformance Main Page* and will receive a confirmation that the plan/appraisal has been submitted to the employee. The performance plan is now displayed under Appraisals of (employee name) section on the *MyPerformance Main Page*. You no longer have ownership and can only view the performance plan.

The screenshot shows the 'MyPerformance Main Page' with a confirmation message at the top: 'Confirmation: The appraisal has been submitted to the employee.' Below this is a warning: '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.' The page includes instructions on how to create and manage performance plans. A table titled 'Plans/Appraisals In Progress' is highlighted with a red box, showing two entries for employees in the HRIS system.

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
HRIS Accoaga, Qretakoni L.	HRIS Accoaga, Qretakoni L.	HRIS Aneskybseya, Pnkntsway U.	2016	74		DnD	Pending	Plan in Progress	View
HRIS Dcbvhd, Aycttufj	HRIS Dcbvhd, Aycttufj	HRIS Aneskybseya, Pnkntsway U.	2016	84		DnD	Pending	Plan in Progress	View

Figure 20 - Confirmation on *MyPerformance Main Page*

Performance Plan: Editing the Plan (Rating Official)

After the performance plan has been created by either you or your employee, it may require edits and further input from either you or your employee. The plan could be routed to you as an empty shell awaiting your input, a final document ready for your review, or a work in progress requiring edits. Your edits can include any of the following:

- Editing draft performance elements created by employee, or
- Creating new performance elements

After you have finished making edits and have finalized the performance elements, the rating official approves them. This section shows you how to edit the plan and transfer it back and forth between you and your employee to finalize it.

Follow these steps to review and edit the performance plan:

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

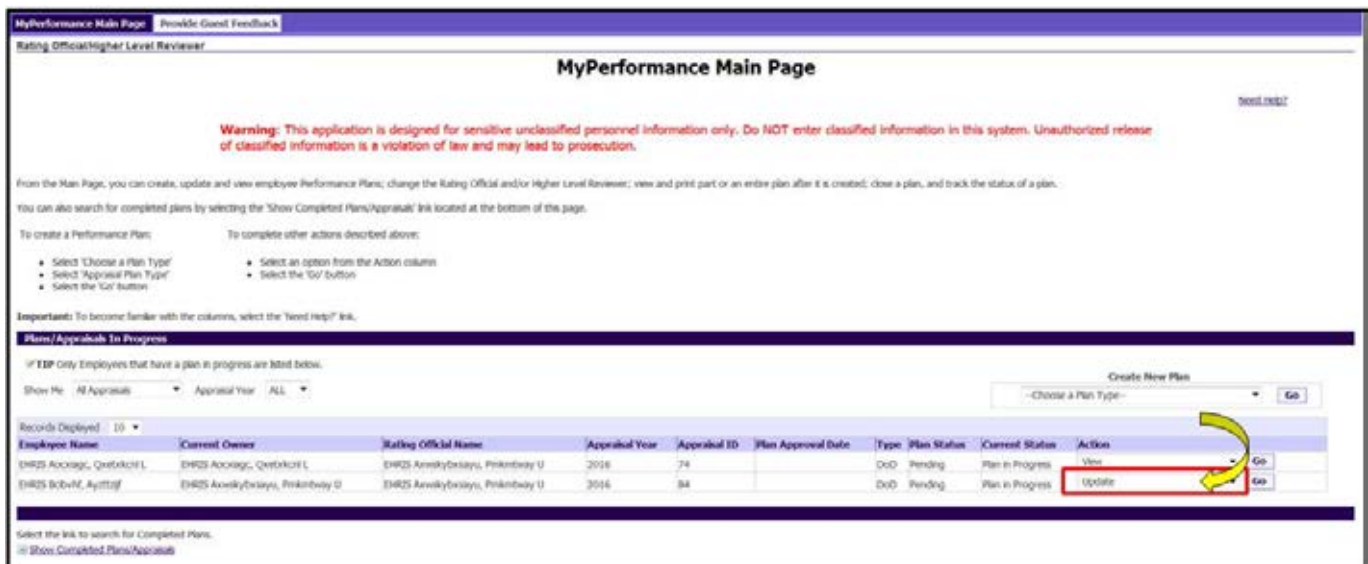


Figure 21 - MyPerformance Main Page

2. When a rating official updates an existing performance plan/appraisal (e.g., when the **Action** column on *MyPerformance Main Page* reflects **Update**), the rating official must acknowledge (using the **Acknowledge** button) that he or she has read and acknowledges their role and responsibilities during the appraisal period each time before working in MyPerformance.

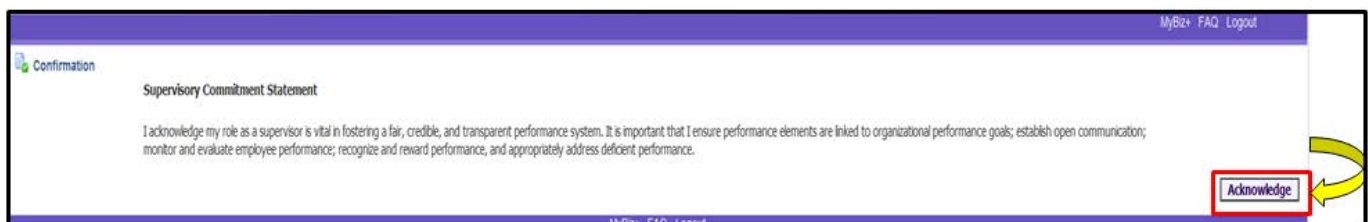


Figure 22 - Supervisory Commitment Statement

3. The *Step 1: Plan Details* page is displayed. Review the **Plan Details** and, if needed, make required changes. Select the **Save and Continue** button to navigate to the *Step 2: Mission Goals* tab.

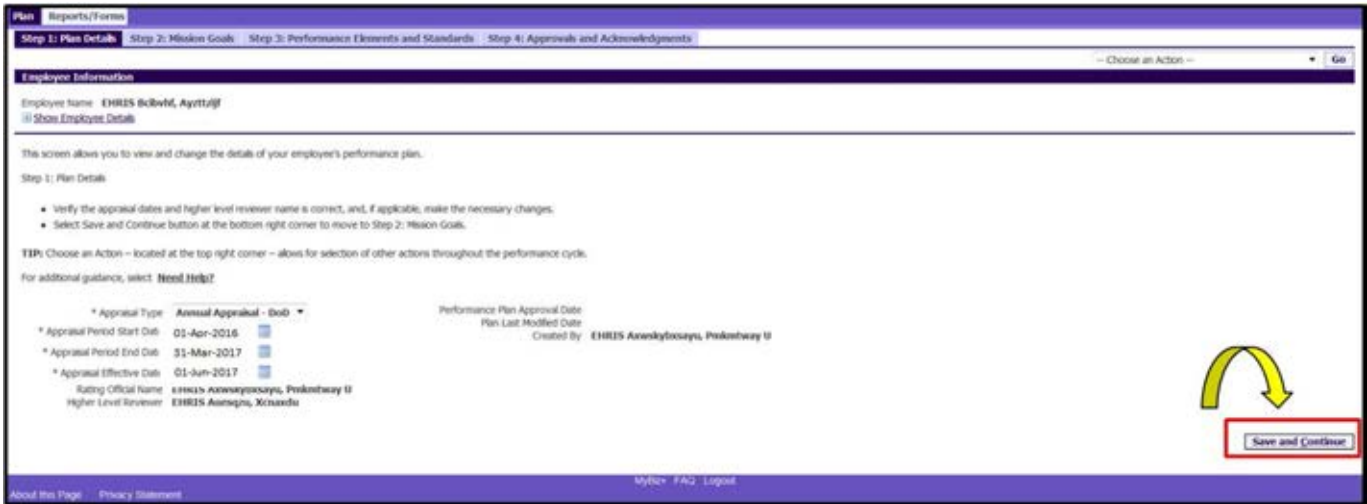


Figure 23 - Plan>Step 1: Plan Details

4. The *Step 2: Mission Goals* page is displayed. Review the Mission Goals and, if needed, make required changes. Select the **Save and Continue** button to navigate to *Step 3: Performance Elements and Standards* tab.

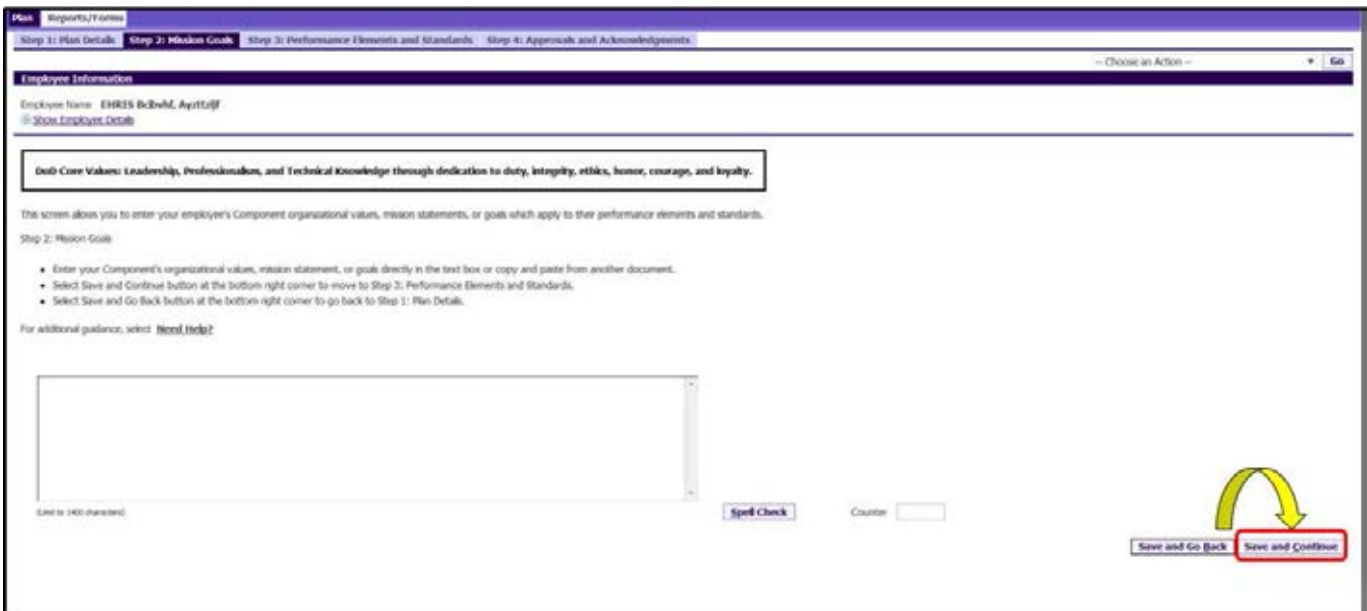


Figure 24 - Plan>Step 2: Mission Goals

5. The *Step 3: Performance Elements and Standards* page is displayed. If you need to add a performance element, select the **Add Performance Element** button.

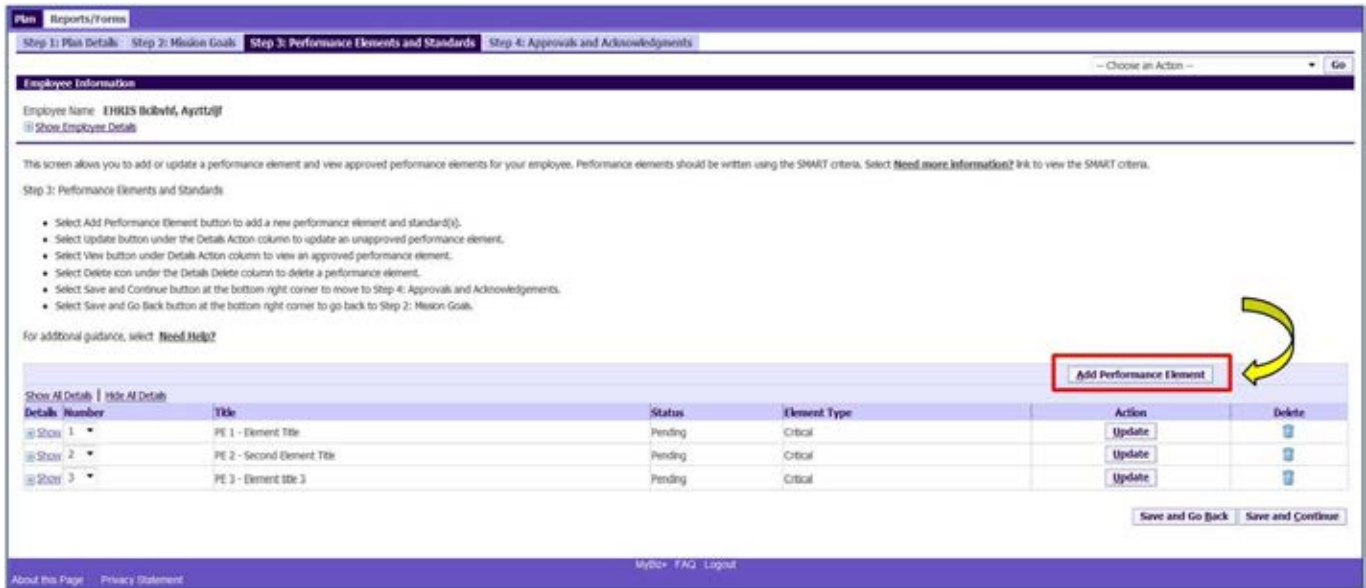


Figure 25 - Plan>Step 3: Performance Elements and Standards

6. The *Add Performance Element and Standard(s)* page is displayed. The asterisk (*) on the page indicates the field is required. Enter data in the required data fields and enter the performance element and standard(s). After you are finished, select the **Save** button and then select the **Go Back to Performance Elements** button.

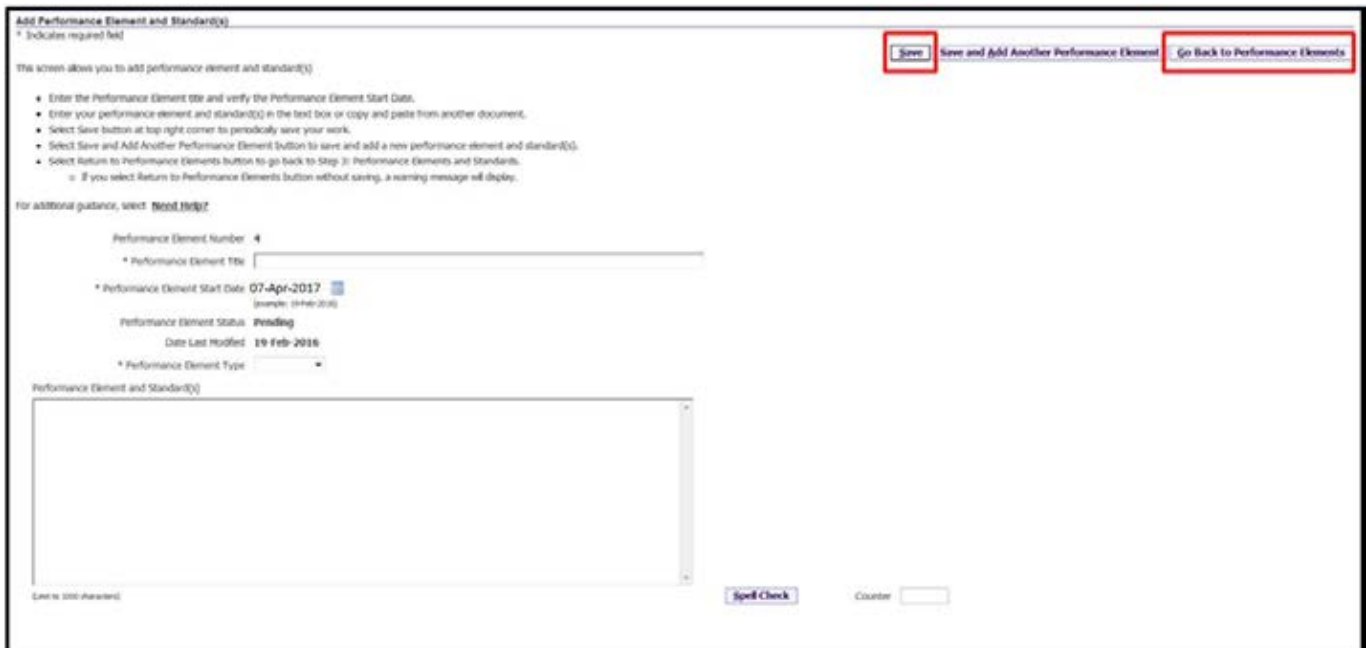


Figure 26 - Add Performance Element and Standards

8. If you need to update an existing performance element, select the **Update** button under the action column. You can delete a performance element by selecting the **Delete** icon.

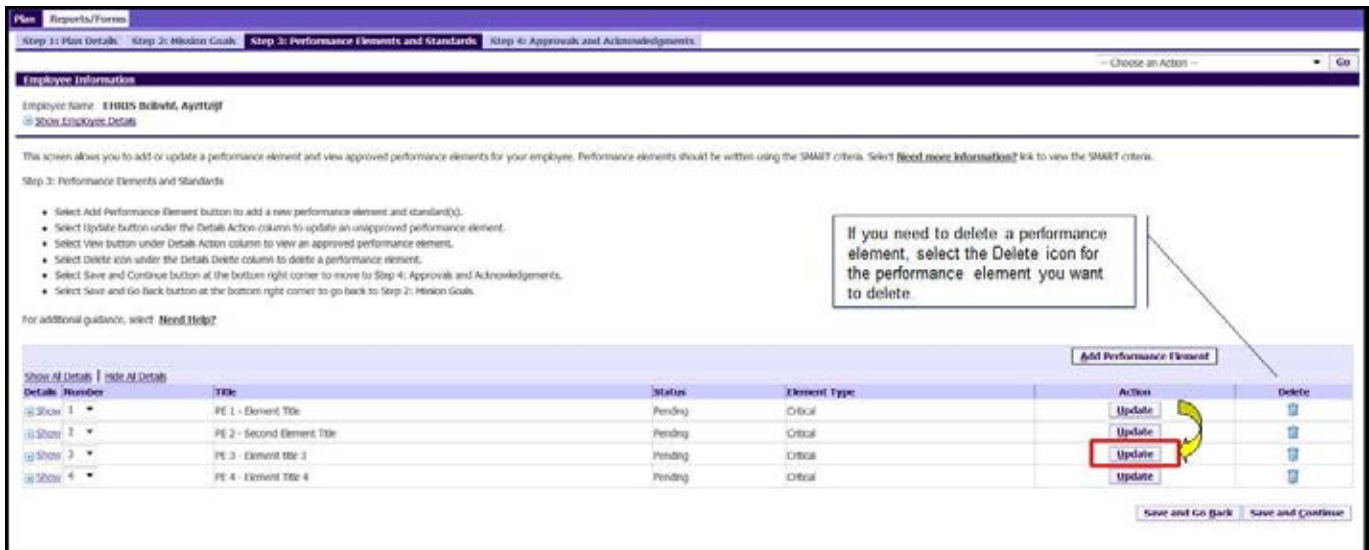


Figure 27 - Plan>Step 3: Performance Elements and Standards



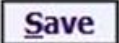

9. Review performance element, and, if needed, make required changes.



Figure 28 - Update Performance Element and Standards

9. Complete the page using one of the following options in the table below.

Table 4 – Decision Table for use when editing Performance Elements and Standards

If You...	Then...
Want to cancel the work that has been created so far	Select the Go Back to Performance Elements button  You will receive a warning message asking if you want to save the changes. Select the No button.
Want to save your updates periodically on the same page	Select the Save button 
Finished adding performance elements and want to return to the Performance Elements and Standards tab	Select the Save button and then select Go Back to Performance Elements button  

10. Once all of the changes have been made on the employee’s plan, you can do one or more of the following:

- Transfer performance plan to employee for their review and concurrence, or
- Communicate with the employee the changes and receive concurrence without transferring to employee, or
- Begin the approval process

Performance Plan: Approving the Plan (Rating Official)

After you and your employee have reviewed and concur with the performance elements and standards as written, you are ready for the performance plan approval.

During the approval process, you will document how the plan was delivered to your employee (i.e., face-to-face or telephone) and the date it was delivered.

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

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

1. The employee or rating official creates the performance plan and enters draft performance elements and standards.
2. The employee and rating official edit and/or add to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between the employee and rating official before the plan is finalized.
3. ***The performance plan is approved by the higher level reviewer, as appropriate, or the rating official documents the higher level reviewer approval.¹***
4. ***The rating official documents communication to employee and transfers the plan to the employee for acknowledgment.***
5. The employee reviews the performance plan and acknowledges that it was communicated to him or her by the rating official.

¹ *As required by Component policy IAW DoDI 1400.25 V431

Table 5: Plan Approval Steps

The below table provides the steps to be taken for obtaining approval of the performance plan.

Plan Approval Steps

Step Number	Performer	Approval Step	Status	Description
1	Rating Official (RO)	Request or Document Higher Level Review*	Not Started	
			Completed	RO has requested HLR review or documented that HLR review has occurred*
2*	Higher Level Reviewer (HLR), as appropriate	Review	Not Started	
			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 Rating Official	Document Employee Acknowledgment	Not Started	
			Completed	Employee acknowledged receipt or RO has entered communication method and date

*As required by Component policy IAW DoDI 1400.25 V431

Follow these steps for the performance plan approval:

1. At the *MyPerformance Main Page* select the performance plan 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.

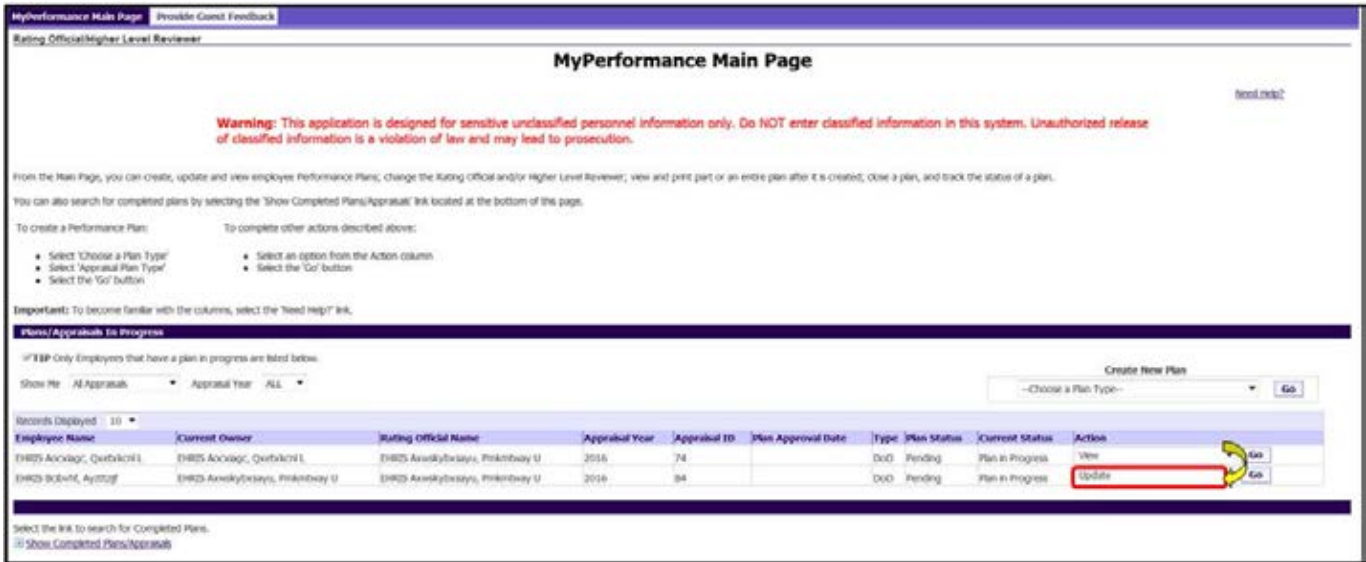


Figure 29 - MyPerformance Main Page

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.



Figure 30 - Supervisory Commitment Statement

3. Navigate to *Step 4: Approvals and Acknowledgments* tab by selecting the tab or by selecting the **Save and Continue** button for a quick review. Then select the **Start** button for *Step 1: Rating Official – Request or Document Higher Level Review*.

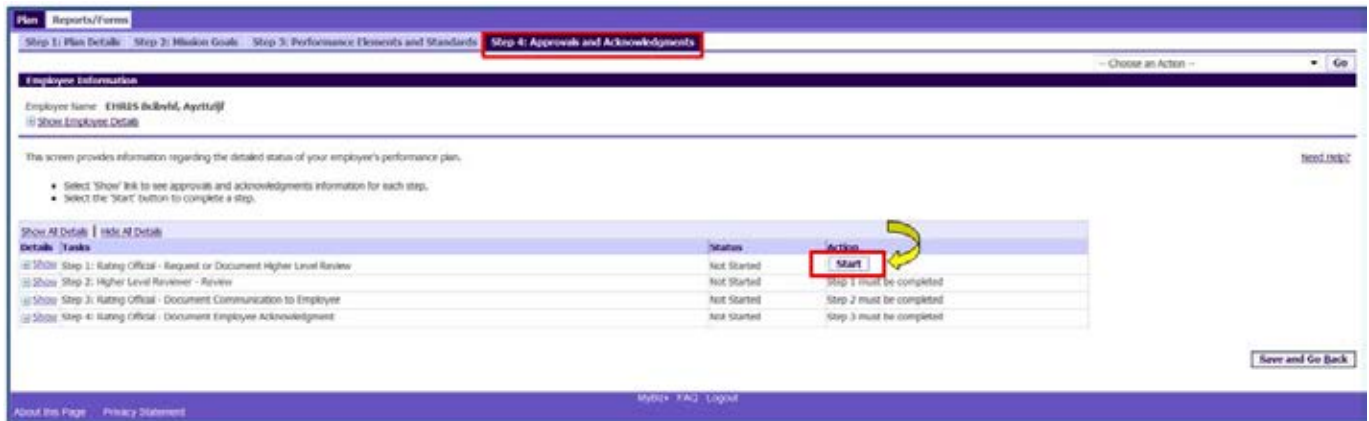


Figure 31 - Plan>Step 4: Approvals and Acknowledgements

4. The *Plan>Step 4: Approvals and Acknowledgements* page will appear. Note 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**.

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

The screenshot displays the 'Plan > Step 4: Approvals and Acknowledgements' page. At the top, there's a navigation bar with 'Plan > Reports/Forms' and a progress indicator showing 'Step 1: Plan Details', 'Step 2: Mission Goals', 'Step 3: Performance Elements and Standards', and 'Step 4: Approvals and Acknowledgements'. Below this, the 'Employee Information' section shows 'Employee Name: EHRIS Avestha, Ayudhi'. A table lists tasks, with 'Step 1: Rating Official - Request or Document Higher Level Review' highlighted. The main content area provides instructions for 'Option A' and 'Option B'. 'Option A' includes a table for selecting a reviewer, a message field, and two buttons: 'Transfer to Higher Level Reviewer without E-mail Notification' and 'Transfer to Higher Level Reviewer with E-mail Notification'. 'Option B' includes a 'Higher Level Reviewer' dropdown, a 'Review Date' field, and a 'Method of Review' dropdown. The 'Go Back' button is at the bottom right.

Figure 32 - *Plan > Step 4: Approvals and Acknowledgements*

5. 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. Note the **Current Status** is now ‘Plan Pending HLR Review.’

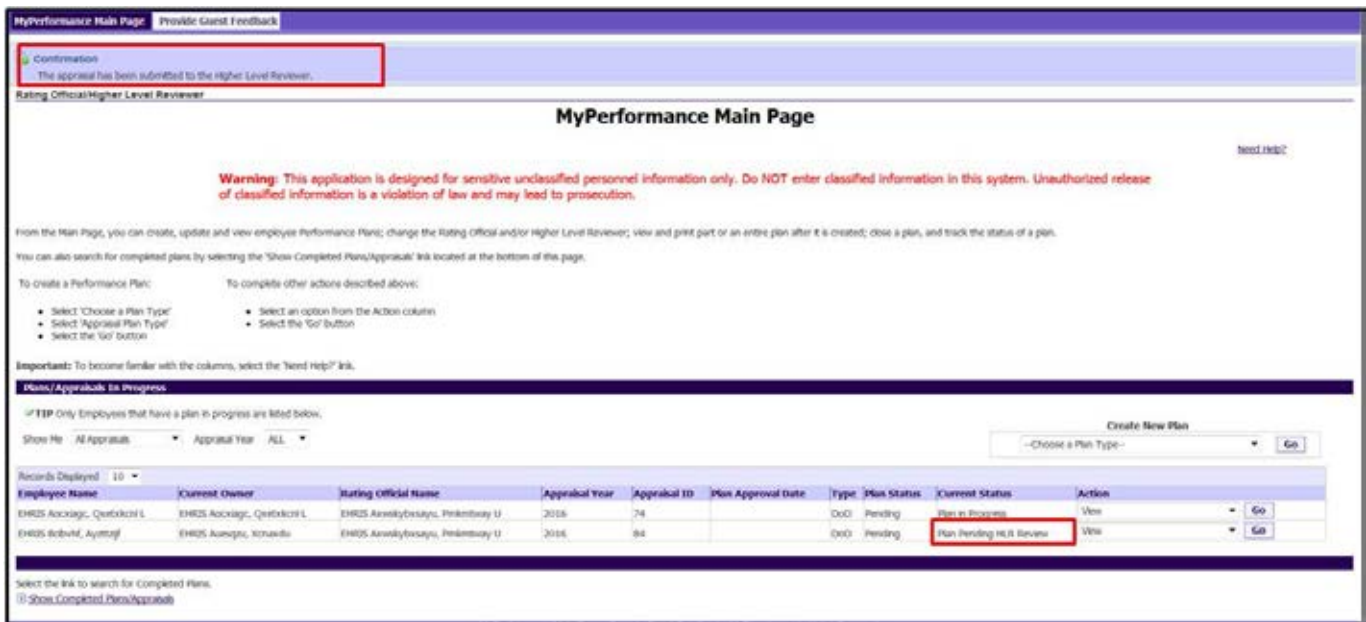


Figure 33 - Confirmation of plan to higher level reviewer - *MyPerformance Main Page*

6. **Option B:** Navigate to *Step 4: Approvals and Acknowledgments* tab and select **Start** button for *Step 1: Rating Official – Request or Document Higher Level Review* as was done in step 4 on page 23. **Option B** is located in the lower portion of the page and provided here.



Figure 34 - Plan>Step 4: Approvals and Acknowledgments

7. 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 6 – 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 by face-to-face meeting or telephone	Select Face-to-Face or Telephone from the Communication Method list of values (LOV), as appropriate
Communicated the performance 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)

- Select the **Save** button.

Figure 35 - Plan>Step 4: Approvals and Acknowledgements

8. 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.

Figure 36 - Confirmation Certification of Plan Accuracy

9. 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.

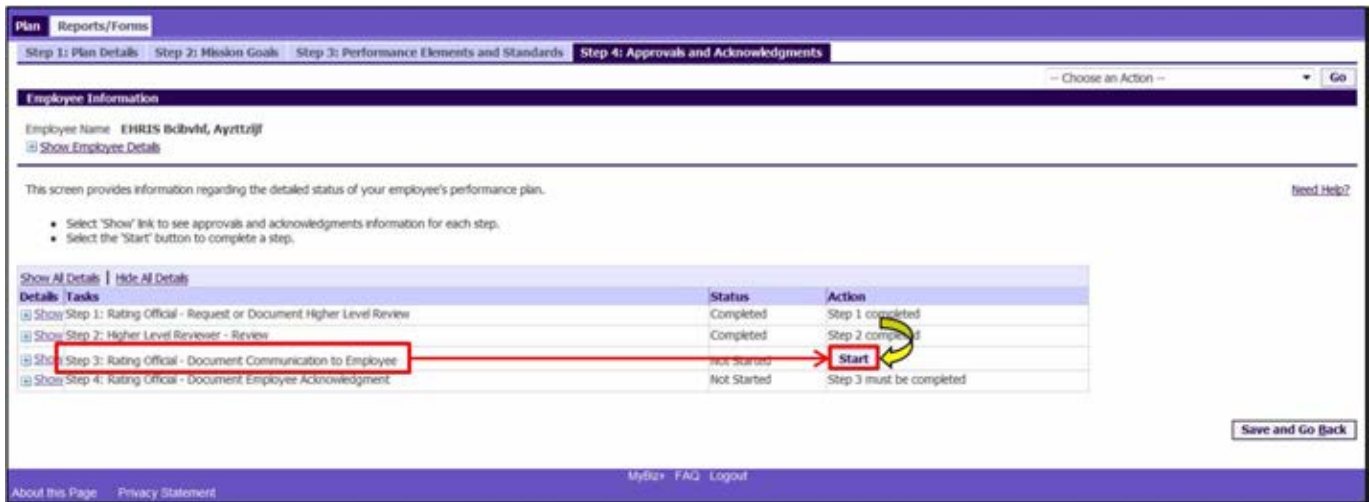


Figure 37 - Plan>Step 4: Approvals and Acknowledgements

10. 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 7 – Documenting communication with the employee

If You...	Then...
Communicated the performance plan by face-to-face meeting or telephone	Select Face-to-Face or Telephone from the Communication Method list of values (LOV), as appropriate
Communicated the performance 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 Other from the Communication Method LOV and document it in Other field

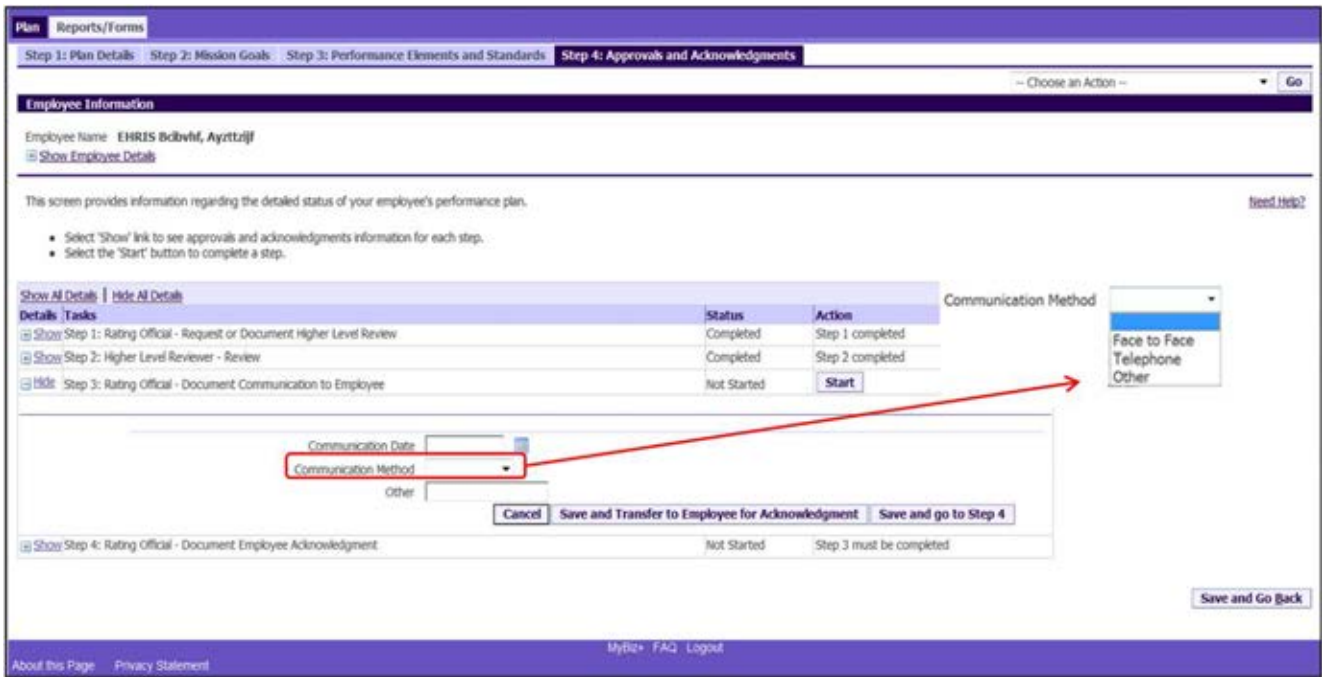


Figure 38 - Plan>Step 4: Approvals and Acknowledgements

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

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

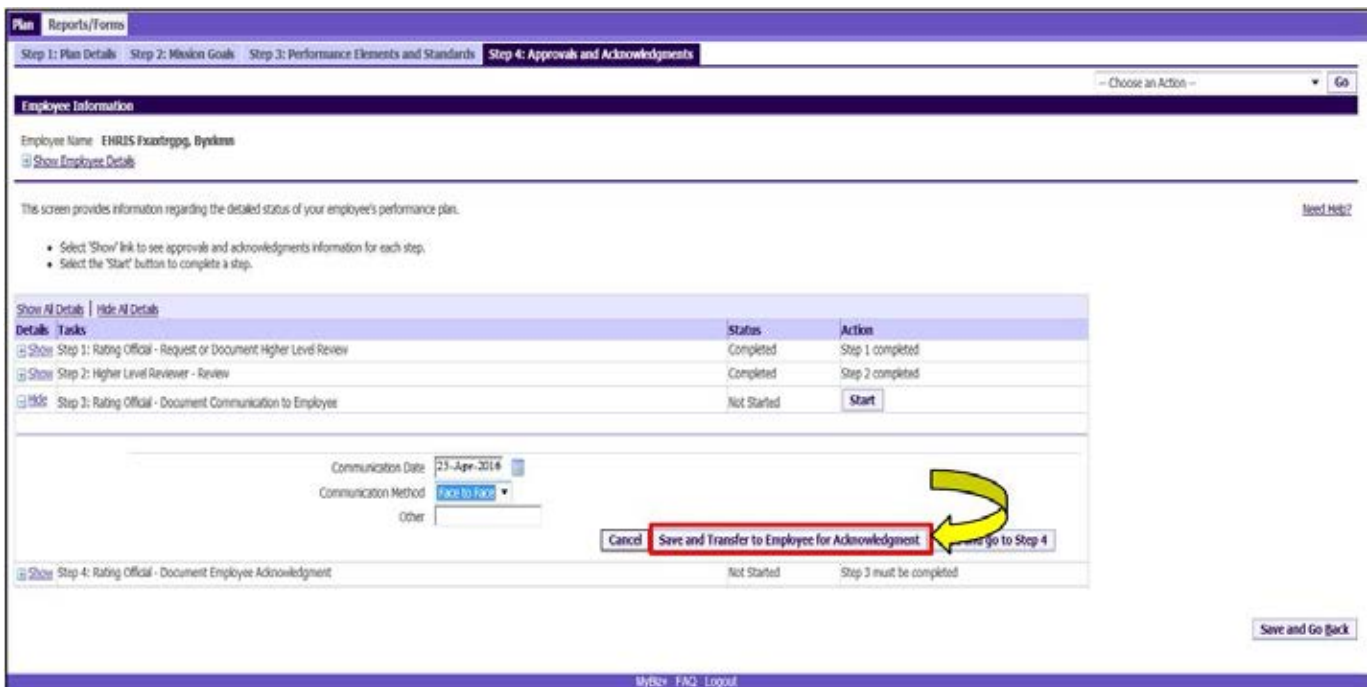


Figure 39 - Plan>Step 4: Approvals and Acknowledgements

12. 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**.



Figure 40 - Rating Official Notification to Employee

13. 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.

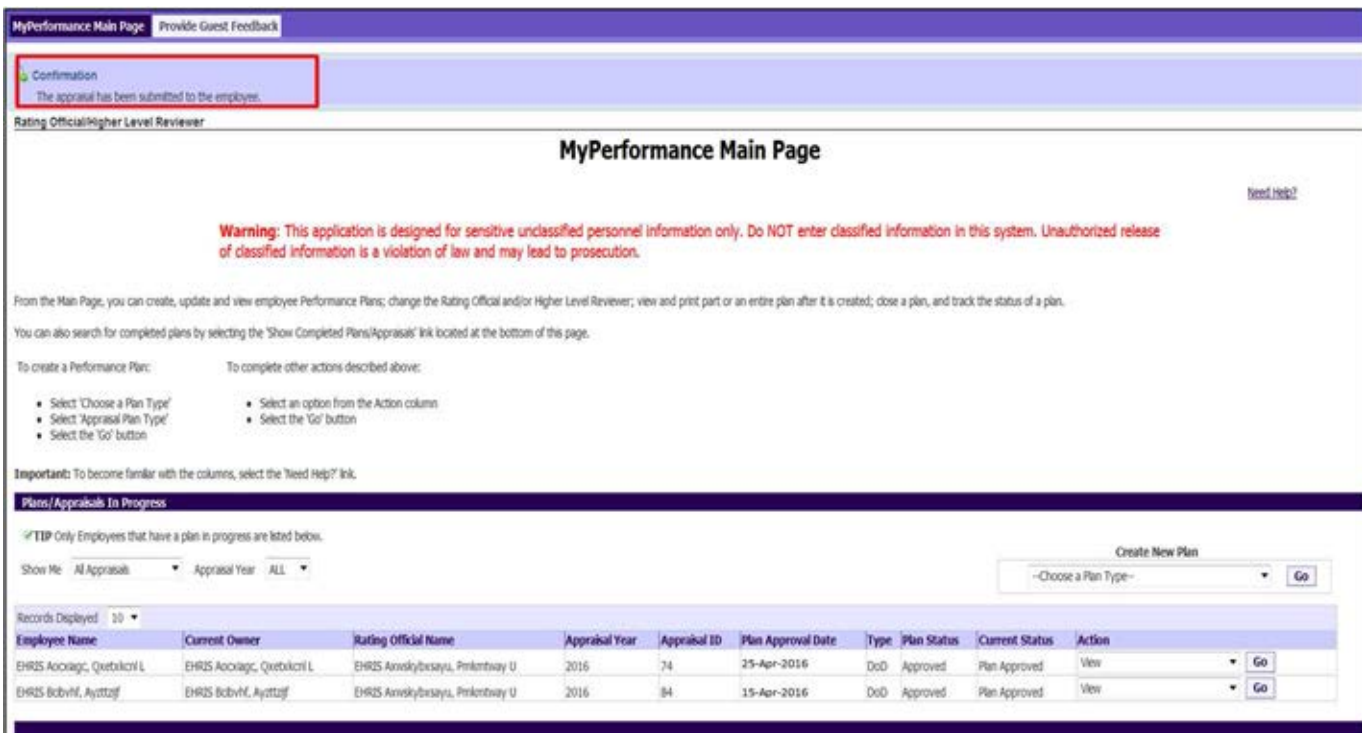


Figure 41 - Confirmation of plan to employee - MyPerformance Main Page

14. 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.

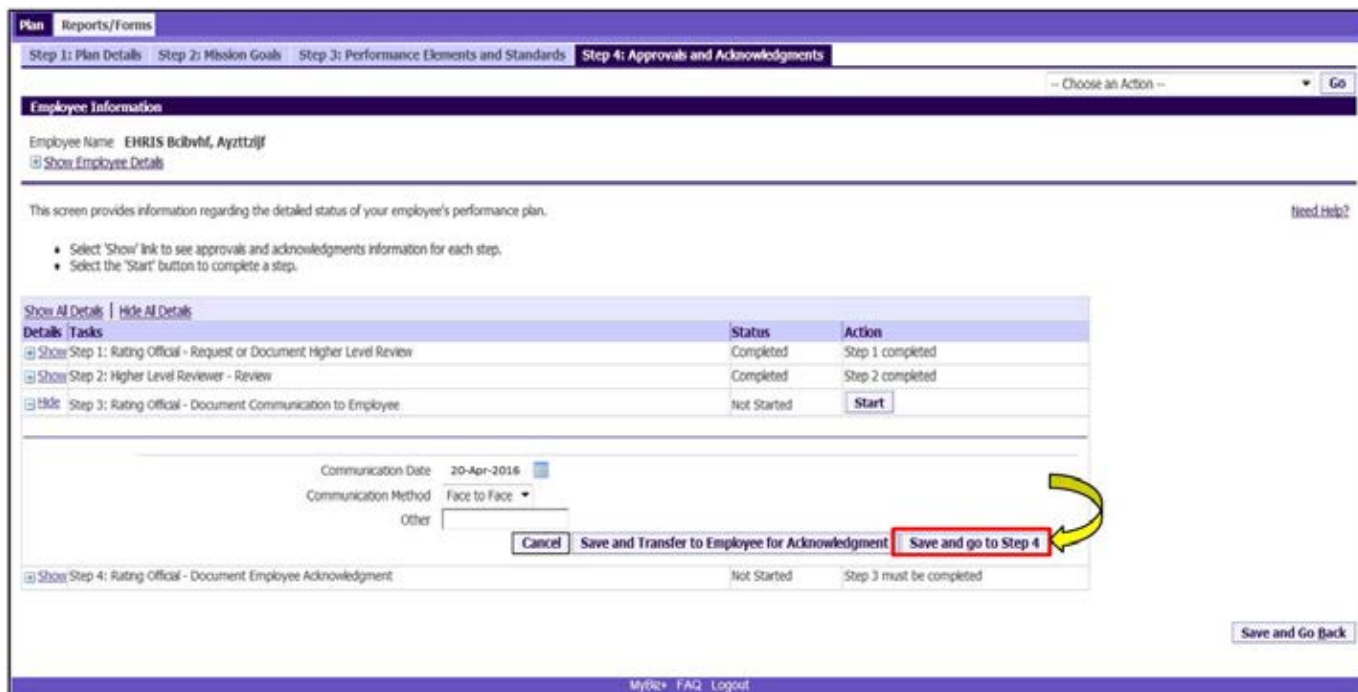


Figure 42 - Plan>Step 4: Approvals and Acknowledgements

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



Figure 43 - Confirmation of Movement to next step

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

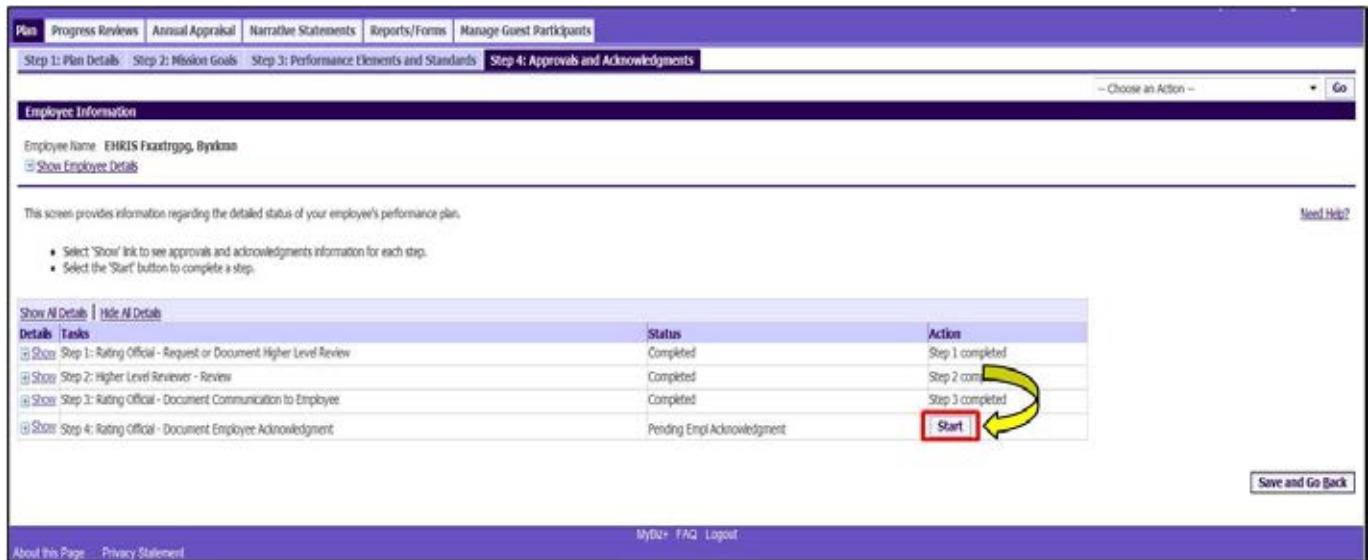


Figure 44 - Plan>Step 4: Approvals and Acknowledgments

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

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

Table 8 – Documenting the employee’s acknowledgement

If ...	Then ...
Employee is unable to acknowledge performance plan due to out of office, no system access, or declined	Select Unable to Sign, No System Access or Employee Declined from the Acknowledgment list of values (LOV), as appropriate
Performance plan was acknowledged using some other method	Select Other from Acknowledgment LOV and enter a short description of the method in Other Method field (20 characters maximum)

- Enter **Date** and select **Save** button.

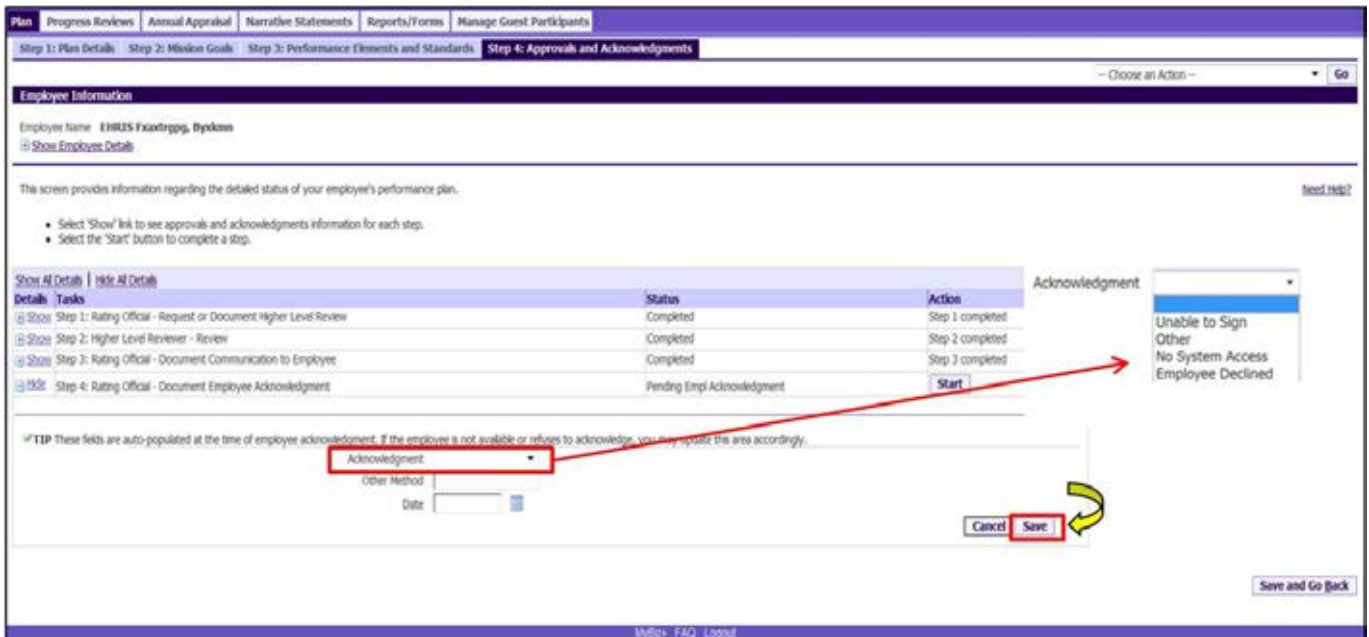


Figure 45 - Plan>Step 4: Approvals and Acknowledgements

18. Step 4 has been completed, select **Return to Main Page** from the **Choose An Action** drop-down menu.

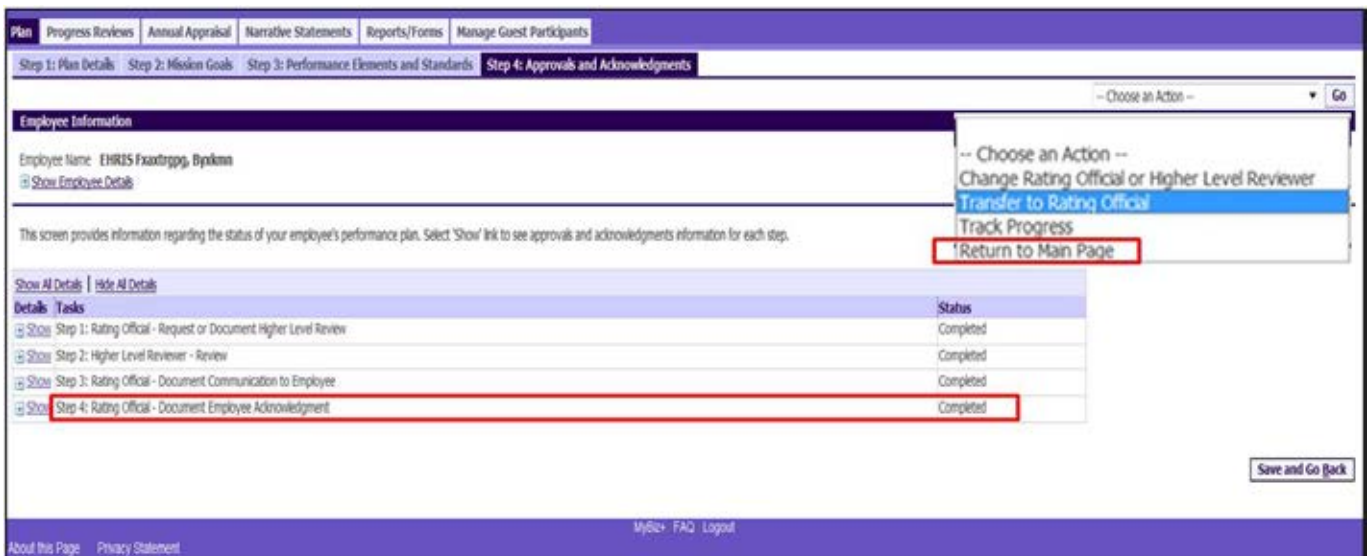


Figure 46 - Plan>Step 4: Approvals and Acknowledgements

19. The **Current Status** is **Plan Approved** and the rating official still has ownership of the performance plan.

MyPerformance Main Page [Provide Guest Feedback](#)

Rating Official/Higher Level Reviewer

MyPerformance Main Page

[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 plans by selecting the 'Show Completed Plans/Approvals' link located at the bottom of this page.

To create a Performance Plan: To complete other actions described above:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button
- Select an option from the Action column
- Select the 'Go' button

Important: To become familiar with the columns, select the 'Need Help?' link.

Plans/Approvals In Progress

TIP Only Employees that have a plan in progress are listed below.

Show: All Approvals Appraisal Year: ALL

Create New Plan

--Choose a Plan Type--

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRS Rozco, Inyfttpp	EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	2016	75	01-Feb-2016	DoD	Approved	Plan Approved	View <input type="button" value="Go"/>
EHRS Faastrggp, Byxkmm	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2016	16	01-Jun-2015	DoD	Approved	Plan Approved	Update <input type="button" value="Go"/>
EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2017	45	04-Jan-2016	DoD	Modified	Plan Returned for Change	Update <input type="button" value="Go"/>
EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2016	11	03-Aug-2015	DoD	Approved	Plan Approved	Update <input type="button" value="Go"/>
CPHS Cagkowsk, Courtney W	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2016	12	04-May-2015	DoD	Approved	Plan Approved	Update <input type="button" value="Go"/>
EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2017	38	20-Apr-2016	DoD	Approved	Narrative Statement Completed	Update <input type="button" value="Go"/>
EHRS Rozco, Inyfttpp	EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	2016	41	04-May-2015	DoD	Approved	Pending Employee Acknowledgment	View <input type="button" value="Go"/>
EHRS Faastrggp, Byxkmm	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2016	54	01-Mar-2016	DoD	Approved	Plan Approved	Update <input type="button" value="Go"/>
EHRS Clutmaek, Dajrft	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2017	55	04-Feb-2016	DoD	Approved	Plan Approved	Update <input type="button" value="Go"/>
EHRS Rozco, Inyfttpp	EHRS Yaghtofz, Numsyestz Z	EHRS Yaghtofz, Numsyestz Z	2017	56	01-Feb-2016	DoD	Approved	Progress Review in Progress	Update <input type="button" value="Go"/>

Records Displayed: 10 Previous: 1-10 Next: 10

Figure 47 - MyPerformance Main Page