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Manage Trusted Agent Authorization

Introduction

1. Manage Trusted Agent Authorization allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the DoD Performance Management and Appraisal Program MyPerformance tool for employees they identify for the purpose of documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer’s performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance, and the rating official or higher level review retains ownership of the plan. The sole purpose of the trusted agent is to document their decisions in the employee’s record. This assignment is accomplished in the ‘Manager Functions’ area of MyBiz+.

DCPDS Portal

1. To access MyPerformance tool, 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+. Performance Management and Appraisal link is located in Key Services.

2. 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.
3. Read the **Privacy Act Statement** and select **Accept** button.

![Privacy Act Statement](image)

**Figure 2 - Privacy Act Statement**
Rating Officials (Managers and Supervisors) Accessing Manage Trusted Agent Authorization

1. From the MyBiz+ home page under Manager Functions in Key Services, select the Manage Trusted Agent Authorization link.

2. You are now on the Manage Trusted Agent Assignments Page where you can assign one or more individuals to act on your behalf for documentation purposes.
Manage Trusted Agent Assignments

Trusted Agent Role

1. Select the role under the Role drop down menu that the trusted agent will act as on behalf of the Rating Official or Higher Level Reviewer. For this scenario, select Rating Official.

2. Select ‘DoD Performance Management Approval Program’ and select ‘Go’ button.
Assigning Trusted Agent for Individual Employee

1. Once you have selected the program, a list of your employees in that program will display. Select employee or employees under the ‘Select’ column on the results table for whom you want to assign the trust agent authorization.

2. The following fields are required: ‘Trusted Agent Name’ and ‘Start Date’. ‘End Date’ is an optional field. Enter ‘Trusted Agent Name’. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the ‘Quick Select’ icon next to your selection.
3. Enter ‘Start Date’ (date cannot be a past date). ‘End Date’ can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.

![Figure 9 - Manage Trusted Agent Assignments Page – Start Date](image)

4. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is **Update**. A trusted agent has been assigned as a role of rating official for the employee.

![Figure 10 - Manage Trusted Agent Assignments Page - Selection](image)

**Assigning Trusted Agent for Multiple Employees**

1. To assign a Trusted Agent for multiple employees, select the **Show Manage Assignment of Trusted Agent for Selected Employee(s)** link.

![Figure 11 - Manage Trusted Agent Assignments Page – Show Management Assignment of Trusted Agent](image)
2. Assign Trusted Agent and Terminate Trusted Agent section opens

![Assign Trusted Agent](image1.png)

**Figure 12 - Manage Trusted Agent Assignments Page – Assign Trusted Agent**

3. The following fields are required: ‘Trusted Agent Name’ and ‘Start Date’. ‘End Date’ is an optional field. Enter ‘Trusted Agent Name’. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the ‘Quick Select’ icon next to your selection.

![Search and Select Trusted Agent Name](image2.png)

**Figure 13 - Manage Trusted Agent Assignments Page – Search and Select Trusted Agent Name**

4. Enter ‘Start Date’ (date cannot be a past date). ‘End Date’ can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.
5. Select the employees from list you wish to have a trusted agent assigned for and select **Apply** button.

6. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is Update. A trusted agent has been assigned as a role of rating official for the employees. A trusted agent can create a plan, input elements, and document the Higher Level Review and communications to employee.
7. To collapse this area, select **Hide Manage Assignment of Trusted Agent for Selected Employee(s)** link.
Terminate Trusted Agent Authorization for Individual Employee

1. Select employee under the Select column to terminate trusted agent authorization. Note: End Date must be blank.

2. Enter End Date – The end date entered will take affect at the end of the day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date. Select **Apply** button.
Terminate Trusted Agent Authorization for Multiple Employees

1. To terminate trusted agent authorization for multiple employees, enter End Date.

2. Select the employees under the Select column to terminate trusted agent authorization. Note: End Date must be blank. Select Apply button.
3. End dates have been applied and end dates entered will take affect at the end of the day, so the supervisor or the new trusted agent will not be allowed to enter any data until the next day.

![Figure 23 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent](image)

**Acting as Trusted Agent**

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 and Appraisal Program.

**DCPDS Portal**

1. To access **MyPerformance tool**, you must first log in to the **DCPDS Portal** at [https://compo.dcpsy.dcpds.osd.mil](https://compo.dcpsy.dcpds.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+**. **MyPerformance** link is located in **Key Services**.

2. 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.
3. Read the **Privacy Act Statement** and select the **Accept** button.
4. From the *MyBiz*+ home page, Other Responsibilities/Applications has to be part of your views to select CIV Trusted Agent responsibility. Select **CIV Trusted Agent** link.

![Figure 26 - MyBiz+ Home Page identifying CIV Trusted Agent Responsibility](image)

**Acting as Trusted Agent under CIV Trusted Agent Responsibility**

1. Select **Acting as Trusted Agent** link under CIV Trusted Agent

![Figure 27 - Navigator – CIV Trusted Agent – Acting as Trusted Agent](image)
2. You are now on the MyPerformance Main Page as the Trusted Agent.

![MyPerformance Main Page as Trusted Agent](image)

3. Select the drop down arrow next to Trusted Agent to select the employee you are Trusted Agent for.

![MyPerformance Main Page Trusted Agent For](image)

4. You can select an Appraisal Year by selecting the drop down arrow next to Appraisal Year or leave as ALL. From this screen, you can create, update and/or view a performance plan/appraisal. You have the same responsibilities as the rating official.
5. For additional guidance on how to create or edit a performance plan/appraisals and approvals and acknowledgments as a rating official, see the MyPerformance (DoD Performance Management and Appraisal Program) Rating Official Guide (Supervisors and Managers).

**View My Trusted Agent Authorizations**

1. Select **View My Trusted Agent Authorizations** link under CIV Trusted Agent in the Navigator pane.

2. The View My Trusted Agent Authorizations screen shows who you are a trusted agent for, and what role – rating official or higher level reviewer you occupy for each employee assigned to you.

   **NOTE:** DCIPS PAA Action(s) to Multiple Employees as Trusted Agent and View My Request links are not part of the DoD Performance Management and Appraisal Program. These links are used by Defense Civilian Intelligence Personnel System.