Narrative Statement Overview for Rating Official

A narrative statement is a brief narrative description of an employee’s performance, accomplishments and contributions during the current appraisal period. Narratives are generally created at the close of the appraisal cycle yet may be created when that the rating official or employee changes job. A narrative statement is not a rating of record.

When is a Narrative Statement Prepared?

The length of time an employee serves under an approved performance plan determines what is required when an employee or supervisor leaves the organization.

A narrative statement is required if an employee has:
- been assigned to a specific supervisor;
- performed under an approved performance plan for 90 calendar days; and
- more than 90 calendar days remain in the appraisal cycle.

Who Participates in a Narrative Statement?

- A rating official will:
  - prepare a narrative statement in MyPerformance or on the DD Form 2906;
  - indicate the start date and end date of the period of performance; and
  - document communication of the narrative statement to the employee.

- An employee will:
  - prepare employee input (voluntary but strongly encouraged) specifically for the narrative statement; and
  - acknowledge the narrative statement in MyPerformance or on the DD Form 2906.

Creating a Narrative Statement

Steps to Create a Narrative Statement

1. On the MyPerformance Main Page, select the performance plan you want to create a narrative statement 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.

   NOTE: The Current Status is Plan Approved.
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.

3. The Step 1: Plan Details page is displayed as pictured below in Figure 3. Select the Narrative Statements tab to create the narrative statement. 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.
4. The Narrative Statements page is displayed as pictured in Figure 4. Select the Create Narrative Statement button to create a narrative statement.

![Figure 4 - Narrative Statements>Create Narrative Statement](image)

5. An Information message will display as pictured below. Select No to go back or Yes to proceed with the creation of the narrative statement.

![Figure 5 - Narrative Statements Information Message](image)

6. The Create/Update Narrative Statement page is displayed. There are two sub tabs on this page: Assessments and Communication and Acknowledgments.

![Figure 6 - Create/Update Narrative Statement>Assessments and Communication and Acknowledgments Tabs](image)

7. Select the radio button next to the performance element and standards you want to enter your performance narrative.
Table 1 - Decision Table for Narrative Statement

<table>
<thead>
<tr>
<th>If You…</th>
<th>Then…..</th>
</tr>
</thead>
<tbody>
<tr>
<td>Want to go to the next performance element to enter your input</td>
<td>Select the Go to Next Performance Element button</td>
</tr>
<tr>
<td>Want to go back to the top of the page after you have finished with your input</td>
<td>Select Go Back to Top of the Page button</td>
</tr>
</tbody>
</table>
8. Once created and/or entered performance narrative, 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 narrative until the narrative statement has been communicated to the employee. Select Go Back to Narrative Statements button to return to the Narrative Statements tab.

9. The initiated narrative statement is now displayed in the table. At this point, you can update or delete the narrative statement.

**NOTE:** There can only be one narrative statement in progress.

10. 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.
11. 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.

**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+.

12. 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 13. 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.

**NOTE:** The current status is Narrative Statement in Progress.
Reviewing and Editing Performance Input for Narrative Statement

After the narrative statement has been created by either you or employee, it may require edits and further input from either you or your employee. The narrative statement 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 transfer it back and forth between you and your employee.

Steps to Review and Edit Narrative Statement

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.

   NOTE: The Current Status is Narrative Statement in Progress.
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.

3. The **Plan Details** page is displayed as pictured below in Figure 16. Select **Narrative Statements** tab to update the narrative statement.

4. The **Narrative Statements** page is displayed as pictured in Figure 17. Select the **Update** button under the **Action** column to edit your performance narratives.
5. The *Create/Update Narrative Statement* page is displayed. Select the radio button next to the performance element and standards you want to edit your narrative statement.

6. At this point, you have made all of the changes to your performance narratives and reviewed the employee input. You can either transfer to employee for changes to their input or start the communication process. Select **Go Back to Narrative Statements** button to return to the
Document Communication to Employee

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

1. The employee or rating official creates the narrative statement, transfers to employee to enter input, and rating official enters performance narratives for each performance element and standard(s).

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

3. **The rating official documents communication to employee and transfers the narrative statement to the employee for acknowledgment.**

4. The employee reviews the narrative statement and acknowledges that it was communicated to him or her by the rating official.

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

Table 2: Narrative Statement Communication and Acknowledgment Steps

The below table provides the steps to be taken for documenting communication of the
narrative statement to the employee.

**Communication and Acknowledgement Steps**

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Performer</th>
<th>Approval Step</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rating Official</td>
<td>Document Communication to Employee</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Completed</td>
<td>RO has entered communication method and date and transferred to the employee or proceeded to Step 4</td>
</tr>
<tr>
<td>2</td>
<td>Employee or Rating Official</td>
<td>Document Employee Acknowledgment</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Completed</td>
<td>Employee acknowledged receipt or RO has entered communication method and date</td>
</tr>
</tbody>
</table>

**Steps to Document Communication Narrative Statement to Employee**

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

   ![MyPerformance Main Page](image)

   **Figure 20 - MyPerformance Main Page>Update Narrative Statement in Progress**

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.
3. Navigate to *Narrative Statement* tab by selecting the tab.

4. The *Narrative Statements* page is displayed as pictured in Figure 23. Select the **Update** button under the **Action** column to start the communication process.

   **NOTE:** Since the narrative statement has not been communicated to the employee, the rating official can delete the Narrative Statement by selecting the **trashcan** icon under **Delete** column.

5. Select *Communication and Acknowledgments* tab.
6. Select the **Start** button to the right of the task titled: *Step 1: Rating Official - Document Communication to Employee* Start button.

7. 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 3 – Documenting Communication with the Employee**

<table>
<thead>
<tr>
<th>If You…</th>
<th>Then…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicated the performance plan by face-to-face meeting or telephone</td>
<td>Select <strong>Face-to-Face</strong> or <strong>Telephone</strong> from the <strong>Communication Method</strong> list of values (LOV), as appropriate</td>
</tr>
<tr>
<td>Communicated the performance plan</td>
<td>Select <strong>Other</strong> from <strong>Communication</strong></td>
</tr>
</tbody>
</table>
using some other method

**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

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**Figure 26 - Communication and Acknowledgments>Documenting Communication Date and Method**

8. 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 2**.

For this scenario, the rating official selects the **Save and Transfer to Employee for Acknowledgment** button.
9. 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**.

10. 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 narrative statement.
11. For this scenario, the rating official selects **Save and go to Step 2** button since the employee may refuse to acknowledge the plan or not be available to electronically acknowledge it, etc.

   12. The **Start** button is available for **Step 2: Rating Official – Document Employee Acknowledgment**. Select **Start** button.
13. To document employee acknowledgment, enter the following information:

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

**Table 4 – Documenting the Employee’s Acknowledgement**

<table>
<thead>
<tr>
<th>If …</th>
<th>Then …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee is unable to acknowledge performance plan due to out of office, no system access, or declined</td>
<td>Select <strong>Refused</strong> from the Acknowledgment list of values (LOV), as appropriate</td>
</tr>
<tr>
<td>Performance plan was acknowledged using some other method</td>
<td>Select <strong>Other</strong> from Acknowledgment LOV and enter a short description of the method in <strong>Other Method</strong> field (20 characters maximum)</td>
</tr>
</tbody>
</table>

- Enter **Date** and select **Save** button.
14. Step 2 has been completed, select **Go Back to Narrative Statements** button to go back to the **Narrative Statements** tab.

15. **Communication Date**, **Communication Method** and **Employee Ack Date** displays in the columns. To view completed narrative statement, select **View History** button.
16. To return to the MyPerformance Main Page, first select Choose an Action LOV drop down arrow depicted in the red box below. Second, select Return to Main Page. Lastly select the Go button to the right.

![Figure 35 - Narrative Statements>Choose an Action>Return to Main Page](image)

17. The **Current Status** is **Narrative Statement Completed** and the rating official still has ownership of the performance plan.

![Figure 36 - MyPerformance Main Page>Narrative Statement Completed](image)