

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.

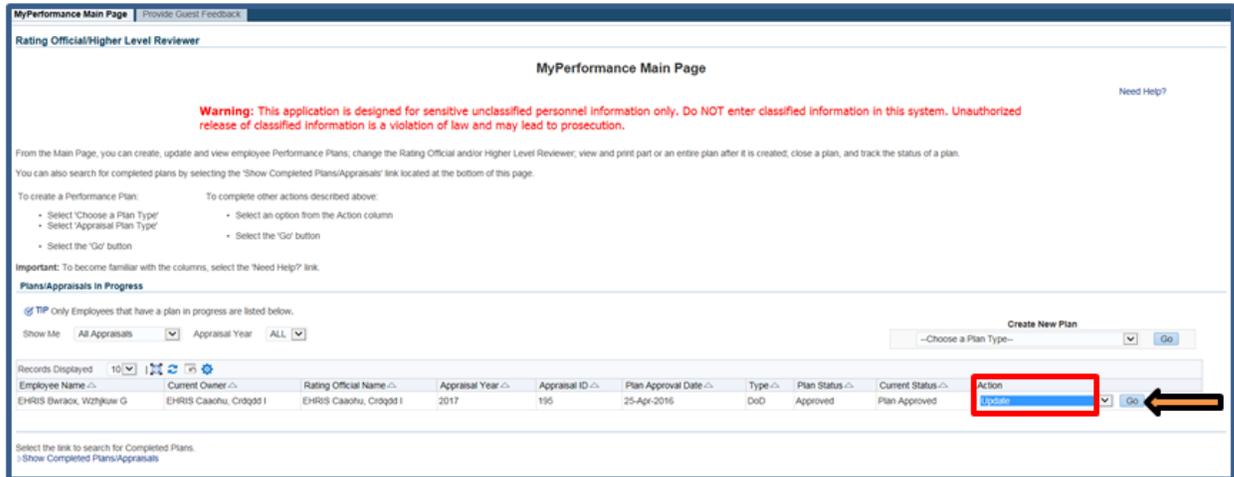


Figure 1 - MyPerformance Main Page

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.

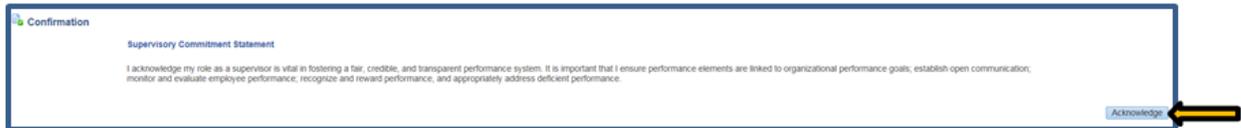


Figure 2 - Supervisor Commitment Statement

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.

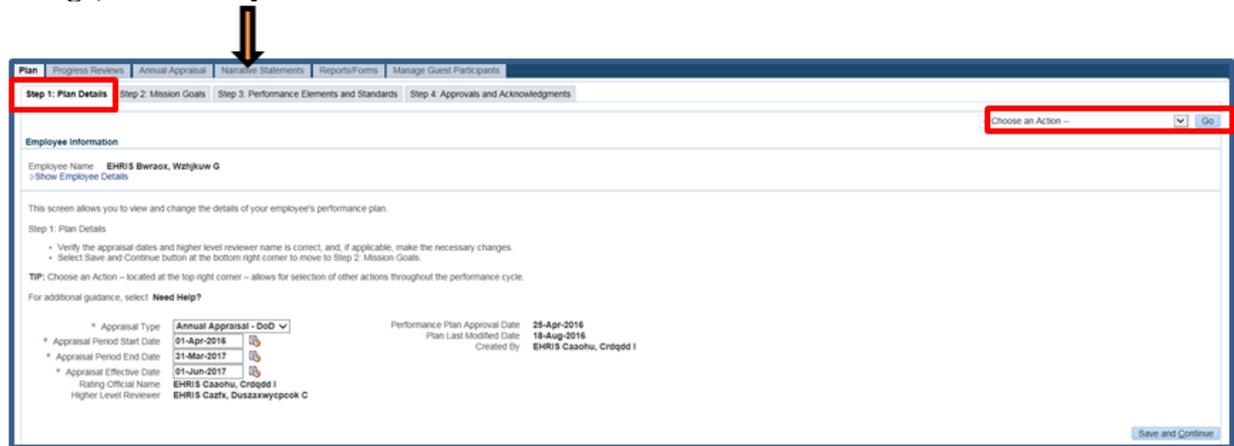


Figure 3 - Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab

4. The *Narrative Statements* page is displayed as pictured in Figure 4. Select the **Create Narrative Statement** button to create a narrative statement.

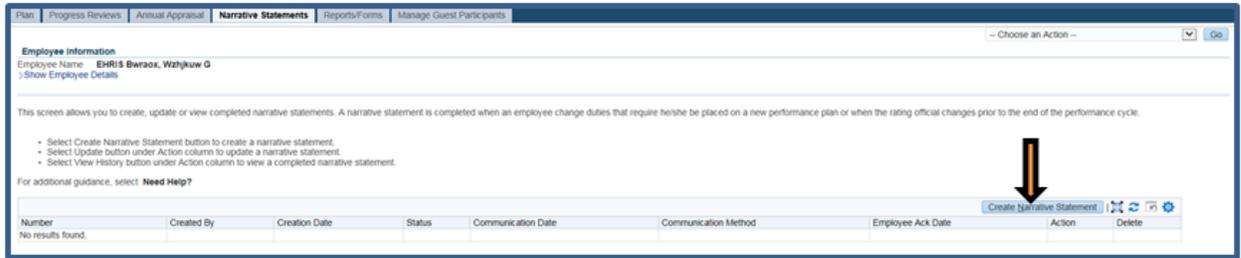


Figure 4 - *Narrative Statements*>*Create Narrative Statement*

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*

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

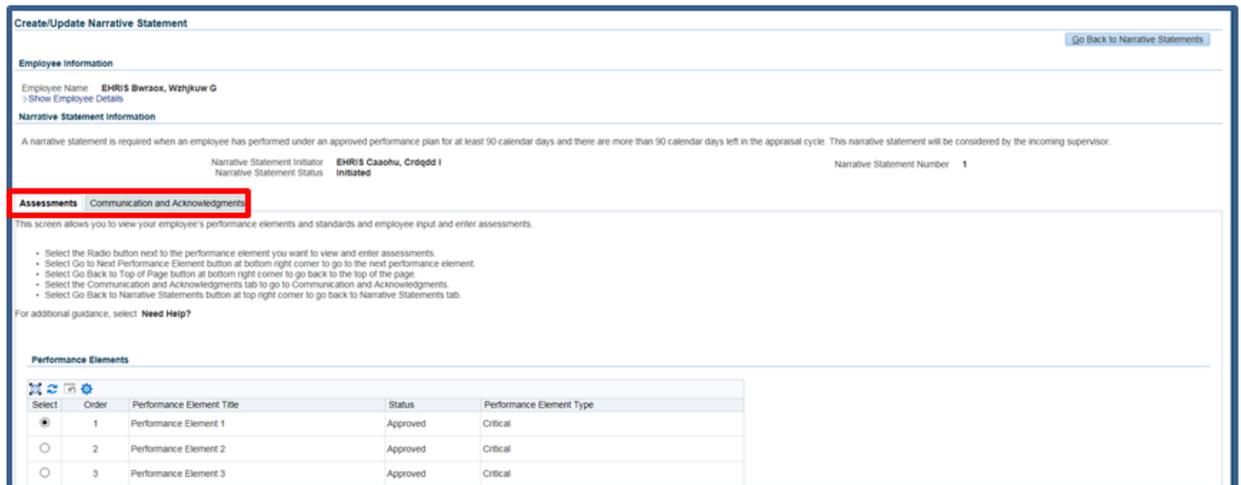


Figure 6 - *Create/Update Narrative Statement*>*Assessments and Communication and Acknowledgments Tabs*

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

Create/Update Narrative Statement [Go Back to Narrative Statements](#)

Employee Information

Employee Name: **EDWIS Barak, Wahyu G**
[Show Employee Details](#)

Narrative Statement Information

A narrative statement is required when an employee has performed under an approved performance plan for at least 30 calendar days and there are more than 30 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.

Narrative Statement Initiator: **EDWIS Cahya, Canggih** Narrative Statement Status: **Included** Narrative Statement Number: **1**

Assessments [Communication and Acknowledgments](#)

This screen allows you to view your employee's performance elements and standards and employee input and enter assessments.

- Select the Radio button next to the performance element 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.
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select the Communication and Acknowledgments tab to go to Communication and Acknowledgments.
- Select Go Back to Narrative Statements button at top right corner to go back to Narrative Statements tab.

For additional guidance, select **Need Help?**

Performance Elements

Select	Order	Performance Element Title	Status	Performance Element Type
<input checked="" type="radio"/>	1	Performance Element 1	Approved	Critical
<input type="radio"/>	2	Performance Element 2	Approved	Critical
<input type="radio"/>	3	Performance Element 3	Approved	Critical

Performance Element and Standard(s)

Employee Input

Rating Official Assessment

Enter performance narrative here. You have a limit of 2000 characters.

Limit to 2000 characters [Spell Check](#) Counter

[Go to Next Performance Element](#) [Go Back to Top of Page](#)

Figure 7 - Create Update Narrative Statement>Assessment Tab

Table 1 - Decision Table for Narrative Statement

If You....	Then.....
Want to go to the next performance element to enter your input	Select the Go to Next Performance Element button <div style="border: 1px solid #00a0e3; padding: 2px; display: inline-block; background-color: #d9e1f2;">Go to Next Performance Element</div>
Want to go back to the top of the page after you have finished with your input	Select Go Back to Top of the Page button



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.

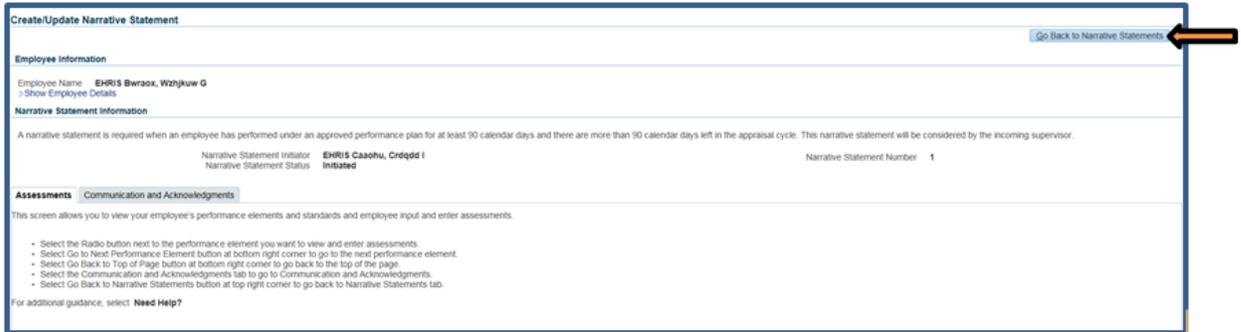


Figure 8 - Create/Update Narrative Statement>Communication and Acknowledgments Tab

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

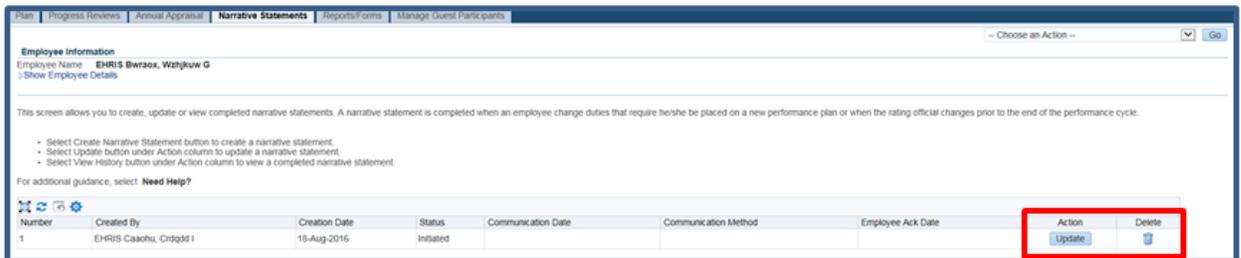


Figure 9 - Return to Narrative Statements Tab

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.



Figure 10 - Narrative Statements>Choose an Action

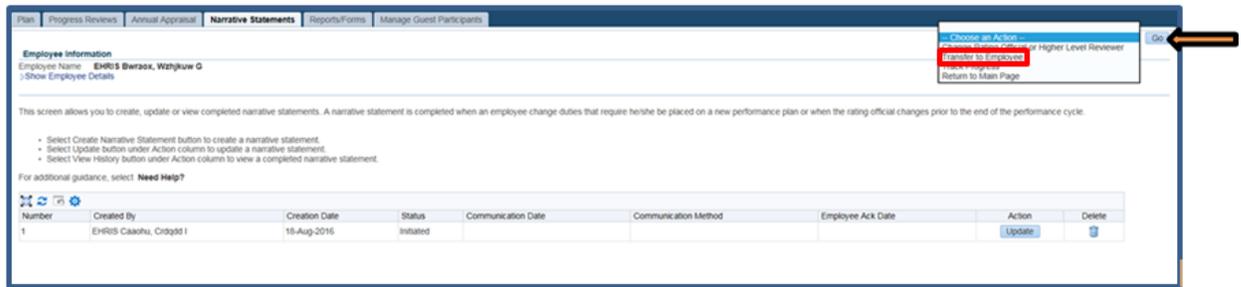


Figure 11 - Narrative Statements>Choose an Action>Transfer to Employee

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.

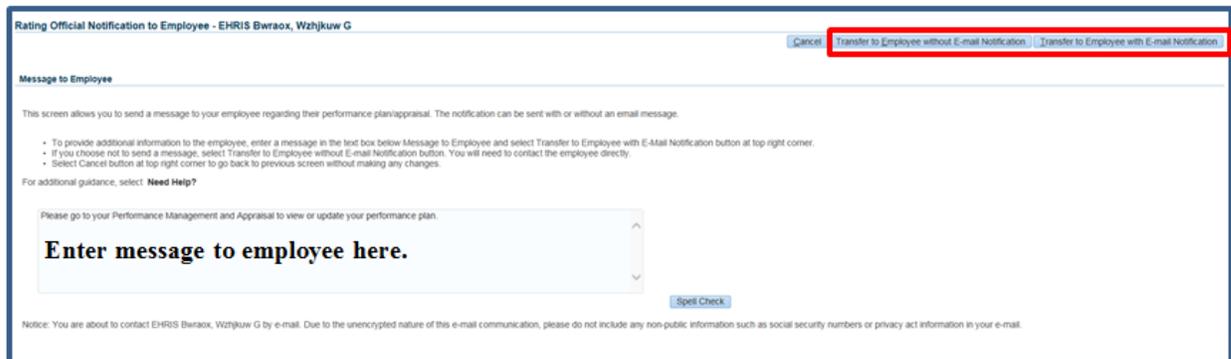


Figure 12 - Rating Official Notification to Employee

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+.

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.

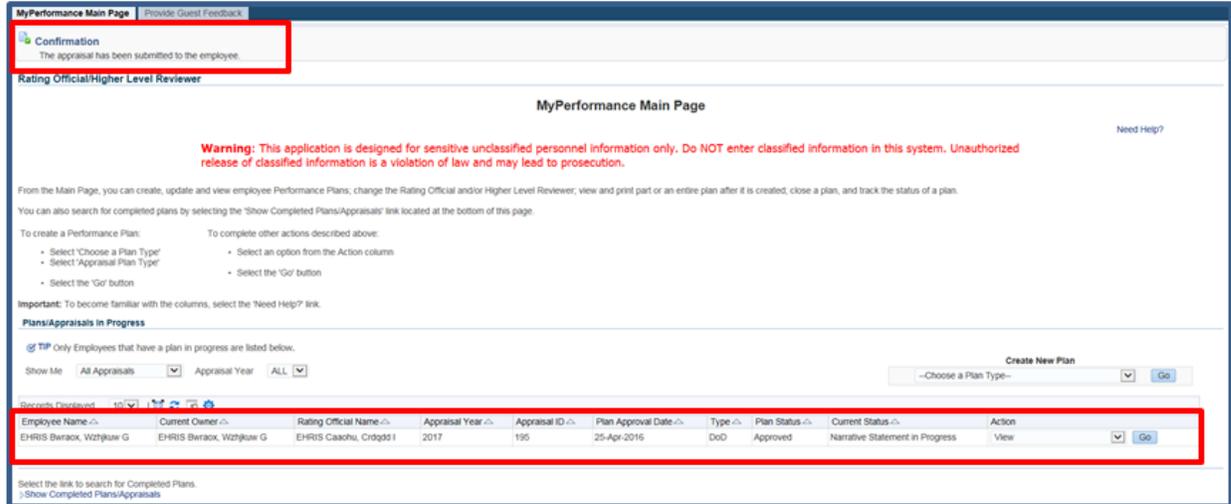


Figure 13 - MyPerformance Main Page>Transfer to Employee Confirmation

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.

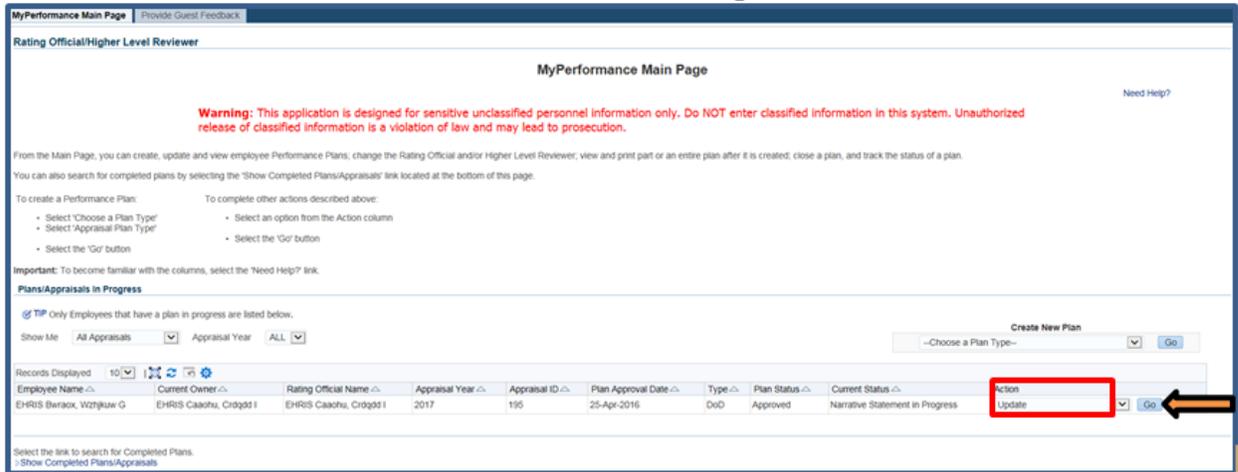


Figure 14 - MyPerformance Main Page>Update Narrative Statement in Progress

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.



Figure 15 - Supervisor Commitment Statement

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

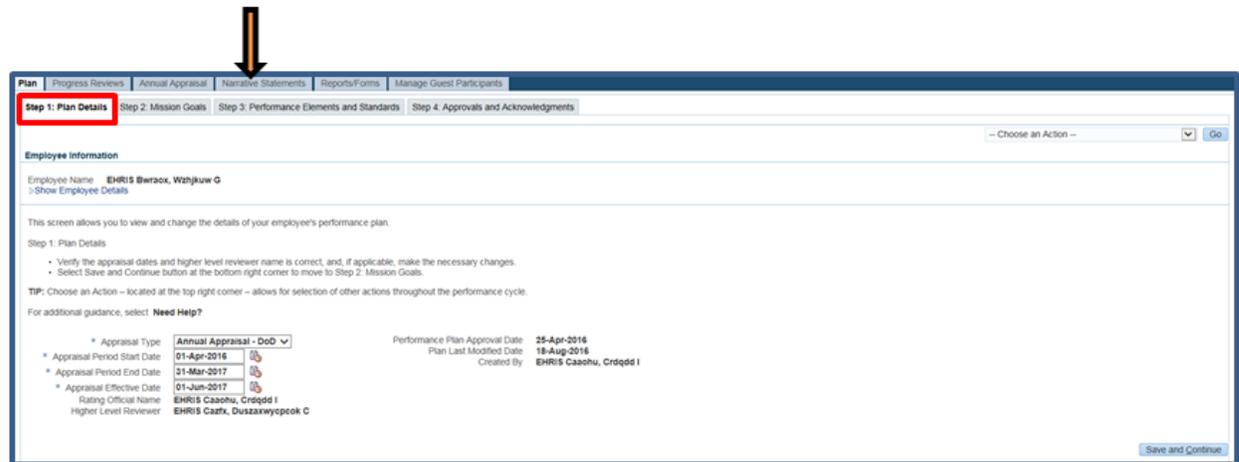


Figure 16 - Plan>Step 1: Plan Details>Navigate to Narrative Statement Tab

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.

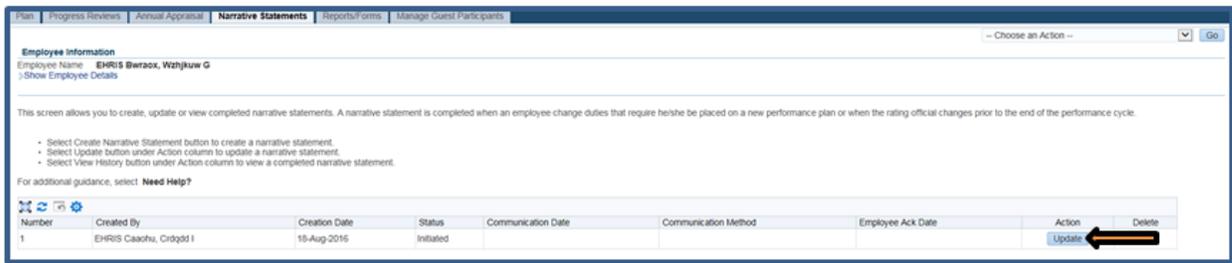


Figure 17 - Narrative Statements>Update Narrative Statement

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.

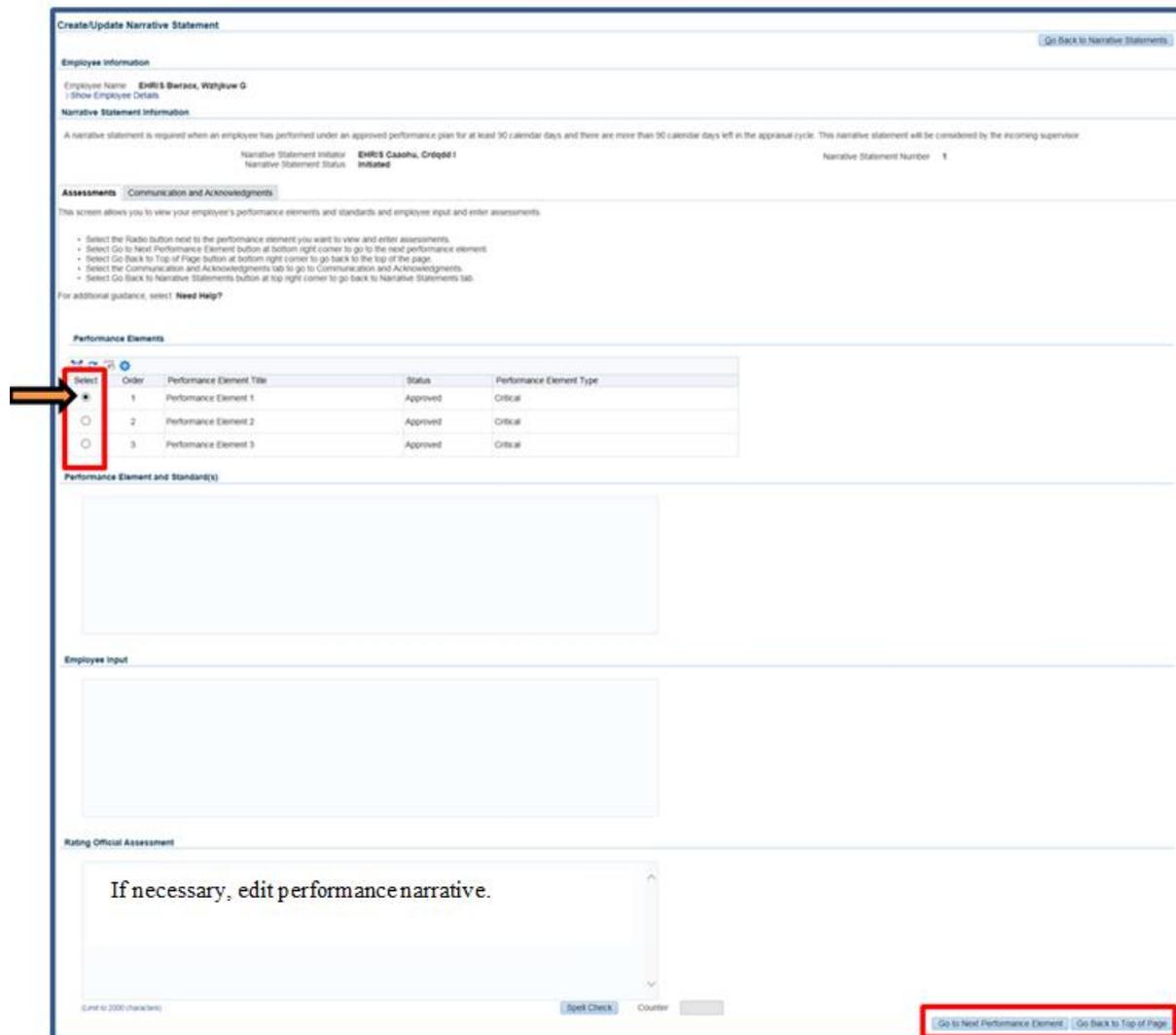


Figure 18 – Create/Update Narrative Statement>Edit Performance Narrative

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

Narrative Statements tab or select *Communication and Acknowledgments* tab to document communication process.

Create/Update Narrative Statement

Employee Information
Employee Name: EHRIS Bwraox, Wzhjkuw G
> Show Employee Details

Narrative Statement Information
A narrative statement is required when an employee has performed under an approved performance plan for at least 90 calendar days and there are more than 90 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.
Narrative Statement Initiator: EHRIS Casohu, Crdqdd I
Narrative Statement Status: Initiated
Narrative Statement Number: 1

Assessments: **Communication and Acknowledgments**

This screen allows you to view your employee's performance elements and standards and employee input and enter assessments.

- Select the Radio button next to the performance element 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.
- Select Go Back to Top of Page button at bottom right corner to go back to the top of the page.
- Select the Communication and Acknowledgments tab to go to Communication and Acknowledgments.
- Select Go Back to Narrative Statements button at top right corner to go back to Narrative Statements tab.

For additional guidance, select **Need Help?**

Performance Elements

Select	Order	Performance Element Title	Status	Performance Element Type
<input checked="" type="radio"/>	1	Performance Element 1	Approved	Critical
<input type="radio"/>	2	Performance Element 2	Approved	Critical
<input type="radio"/>	3	Performance Element 3	Approved	Critical

Figure 19 - Create/Update Narrative Statement>Communication and Acknowledgments Tab>Go Back to Narrative Statement Tab

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

Step Number	Performer	Approval Step	Status	Description
1	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
2	Employee or Rating Official	Document Employee Acknowledgment	Not Started	
			Completed	Employee acknowledged receipt or RO has entered communication method and date

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.

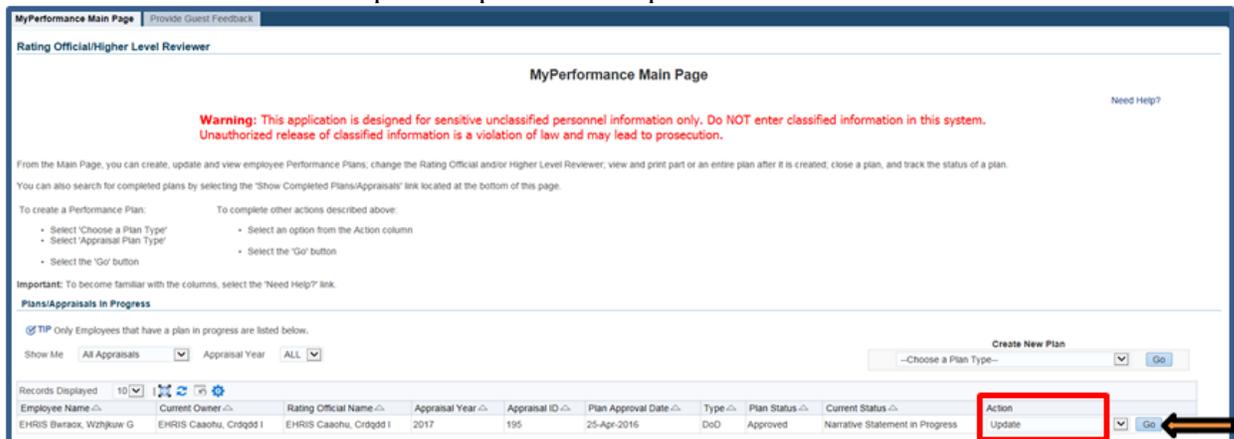


Figure 20 - MyPerformance Main Page>Update Narrative Statement in Progress

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.

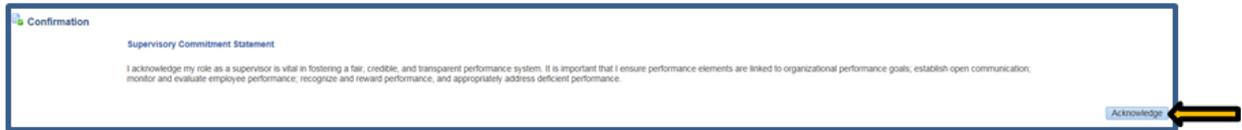


Figure 21 - Supervisor Commitment Statement

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

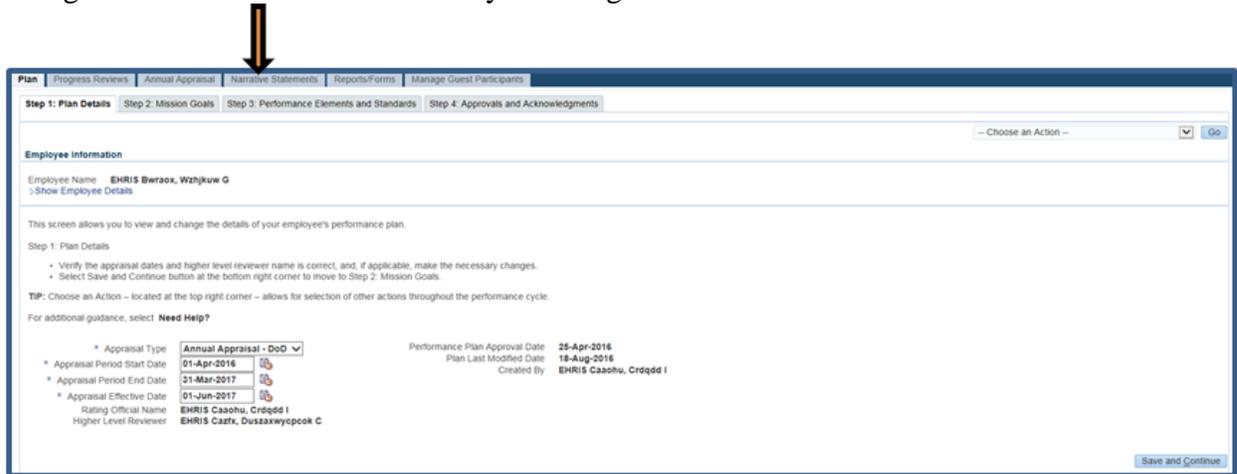


Figure 22 - Plan>Step 1: Plan Details>Navigate to Narrative Statements Tab

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.

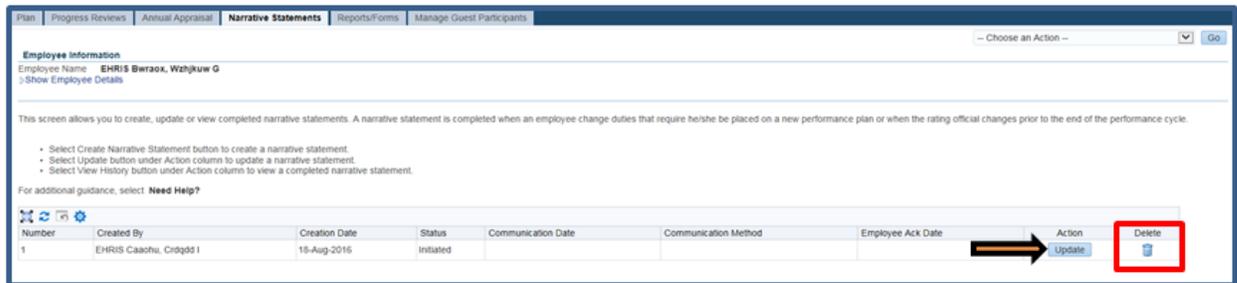


Figure 23 - Narrative Statements>Start Communication Process or Delete Narrative Statement

5. Select *Communication and Acknowledgments* tab.

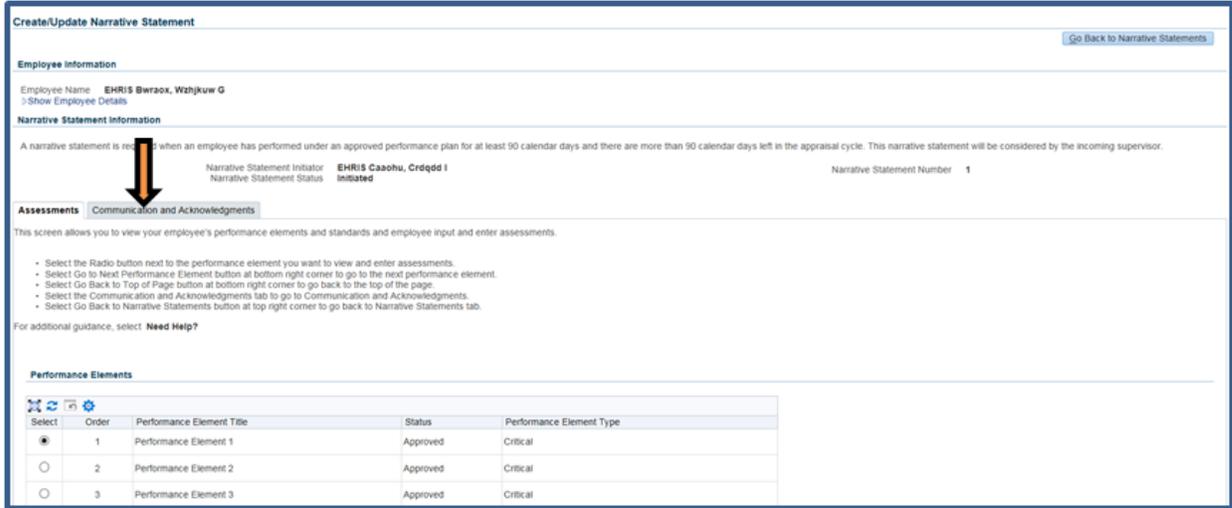


Figure 24 - Create/Update Narrative Statement>Communication and Acknowledgments

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

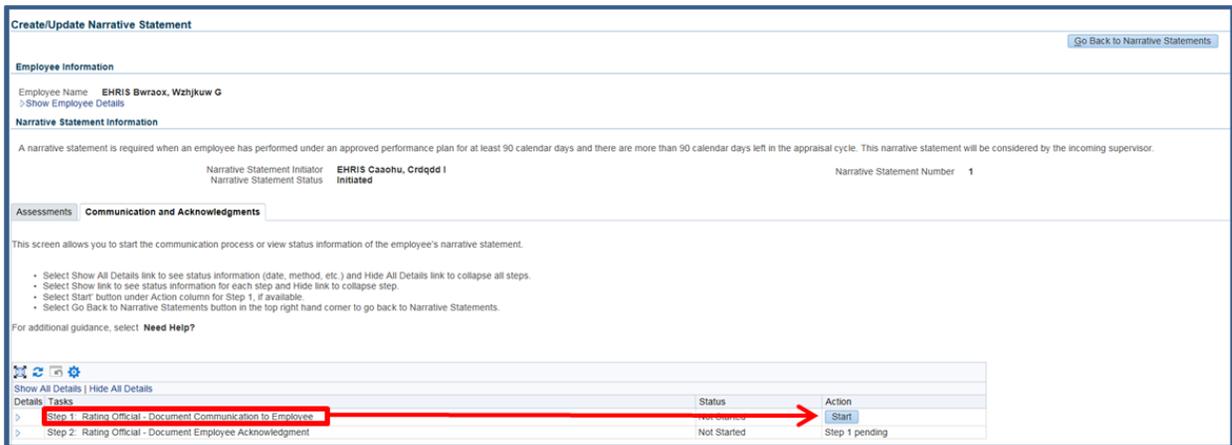


Figure 25 - Communication and Acknowledgments>Step 1: Rating Official - Document Communication to Employee

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

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	Select Other from Communication

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

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.

Figure 27 - Communication and Acknowledgments>Save and Transfer to Employee

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**.

Figure 28 - Rating Official Notification to Employee

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.

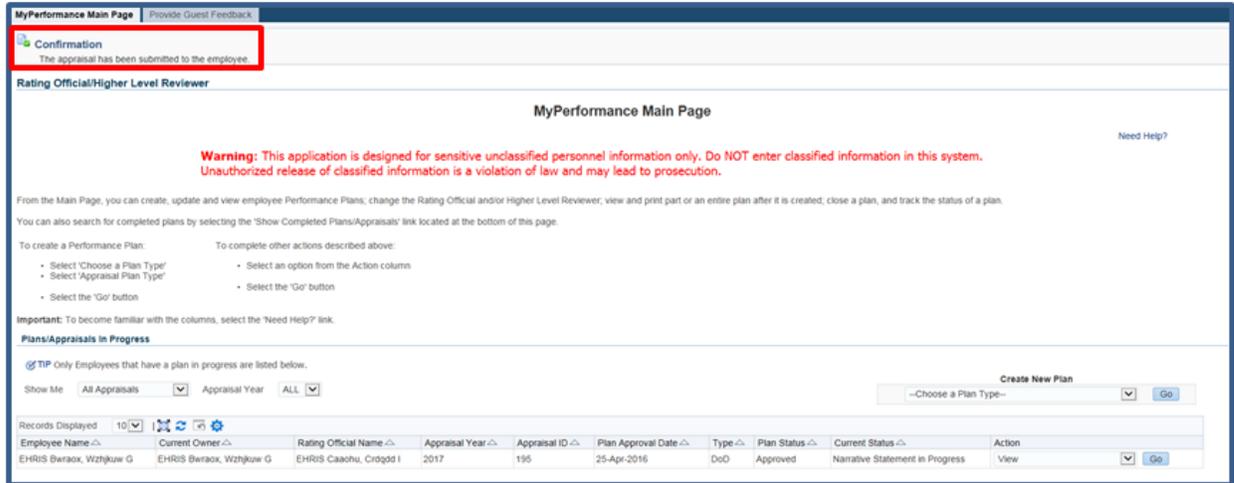


Figure 29 - MyPerformance Main Page>Appraisal Transferred to Employee Confirmation

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.

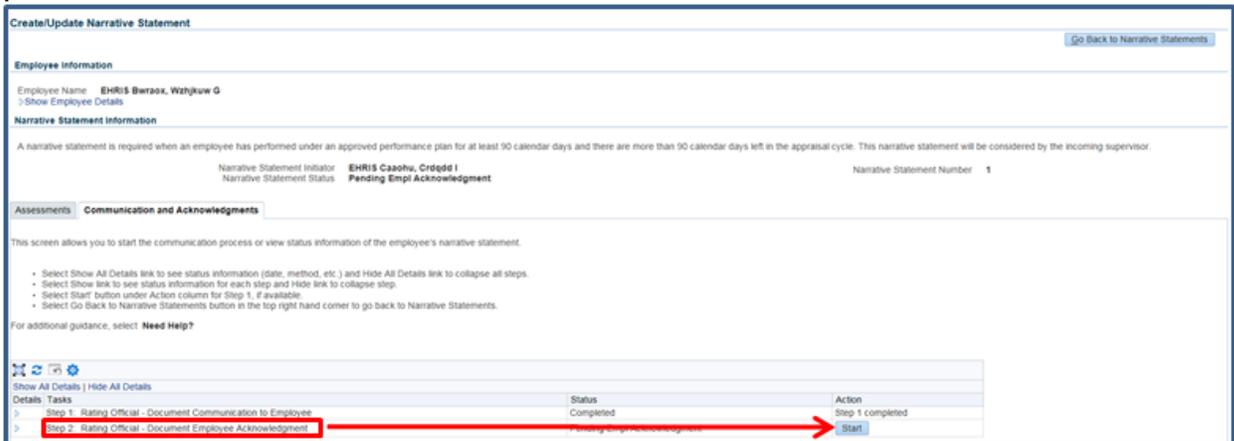


Figure 30 - Communication and Acknowledgments>Go to Step 2

12. The **Start** button is available for Step 2: Rating Official – Document Employee Acknowledgment. Select **Start** button.

Create/Update Narrative Statement [Go Back to Narrative Statements](#)

Employee Information

Employee Name **EHRIS Barzox, Wzh/kuw G**
 > Show Employee Details

Narrative Statement Information

A narrative statement is required when an employee has performed under an approved performance plan for at least 90 calendar days and there are more than 90 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.

Narrative Statement Initiator **EHRIS Caoahu, Ciqedd J**
 Narrative Statement Status **Pending Empl Acknowledgment** Narrative Statement Number **2**

Assessments **Communication and Acknowledgments**

This screen allows you to start the communication process or view status information of the employee's narrative statement.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see status information for each step and Hide link to collapse step.
- Select Start button under Action column for Step 1, if available.
- Select Go Back to Narrative Statements button in the top right hand corner to go back to Narrative Statements.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
>	Step 1: Rating Official - Document Communication to Employee	Completed	Step 1 completed
>	Step 2: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	Start 

Figure 31 - Communication and Acknowledgments>Step 2: Rating Official - Document Employee Acknowledgment

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

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

Table 4 – 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 Refused 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.

Create/Update Narrative Statement [Go Back to Narrative Statements](#)

Employee Information
 Employee Name: **EHRIS Bwraox, Wzhjkuw G**
 > Show Employee Details

Narrative Statement Information
 A narrative statement is required when an employee has performed under an approved performance plan for at least 90 calendar days and there are more than 90 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.
 Narrative Statement Initiator: **EHRIS Caaohu, Crdqdd I**
 Narrative Statement Status: **Pending Empl Acknowledgment**
 Narrative Statement Number: **2**

Assessments | **Communication and Acknowledgments**

This screen allows you to start the communication process or view status information of the employee's narrative statement.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see status information for each step and Hide link to collapse step.
- Select Start button under Action column for Step 1, if available.
- Select Go Back to Narrative Statements button in the top right hand corner to go back to Narrative Statements.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details
 TIP These fields are auto-populated at the time of employee acknowledgment. If the employee is not available to acknowledge, you may update this area accordingly.

Details	Tasks	Status	Action
>	Step 1: Rating Official - Document Communication to Employee	Completed	Step 1 completed
▲	Step 2: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	Start

Acknowledgment Other
 Date:

[Cancel](#) [Save](#)

Figure 32 - Communications and Acknowledgments>Acknowledgment and Date

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

Create/Update Narrative Statement [Go Back to Narrative Statements](#)

Employee Information
 Employee Name: **EHRIS Bwraox, Wzhjkuw G**
 > Show Employee Details

Narrative Statement Information
 A narrative statement is required when an employee has performed under an approved performance plan for at least 90 calendar days and there are more than 90 calendar days left in the appraisal cycle. This narrative statement will be considered by the incoming supervisor.
 Narrative Statement Initiator: **EHRIS Caaohu, Crdqdd I**
 Narrative Statement Status: **Completed**
 Narrative Statement Number: **2**

Assessments | **Communication and Acknowledgments**

This screen allows you to view the status information of the employee's narrative statement.

- Select Show All Details link to see status information (date, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see status information for each step and Hide link to collapse step.
- Select Go Back to Narrative Statements button in the top right hand corner to go back to Narrative Statements.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details
 TIP These fields are auto-populated at the time of employee acknowledgment. If the employee is not available to acknowledge, you may update this area accordingly.

Details	Tasks	Status
>	Step 1: Rating Official - Document Communication to Employee	Completed
▲	Step 2: Rating Official - Document Employee Acknowledgment	Completed

Figure 33 - Communication and Acknowledgments>Completion of Step 2: Rating Official - Document Employee Acknowledgment

15. **Communication Date, Communication Method and Employee Ack Date** displays in the columns. To view completed narrative statement, select **View History** button.

Plan | Progress Reviews | Annual Appraisal | **Narrative Statements** | Reports/Forms | Manage Guest Participants

Employee Information
 Employee Name: **EHRIS Bwraox, Wzhjkuw G**
 > Show Employee Details

This screen allows you to create, update or view completed narrative statements. A narrative statement is completed when an employee change duties that require he/she be placed on a new performance plan or when the rating official changes prior to the end of the performance cycle.

- Select Create Narrative Statement button to create a narrative statement.
- Select Update button under Action column to update a narrative statement.
- Select View History button under Action column to view a completed narrative statement.

For additional guidance, select **Need Help?**

Number	Created by	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Action
1	EHRIS Caaohu, Crdqdd I	18-Aug-2016	Completed	18-Aug-2016	Face to Face	18-Aug-2016	View History

Figure 34 - Narrative Statements>View History

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.

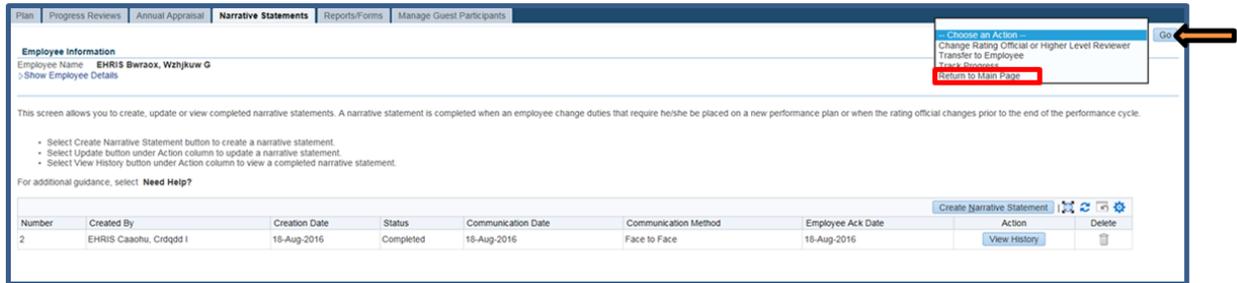


Figure 35 - Narrative Statements>Choose an Action>Return to Main Page

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

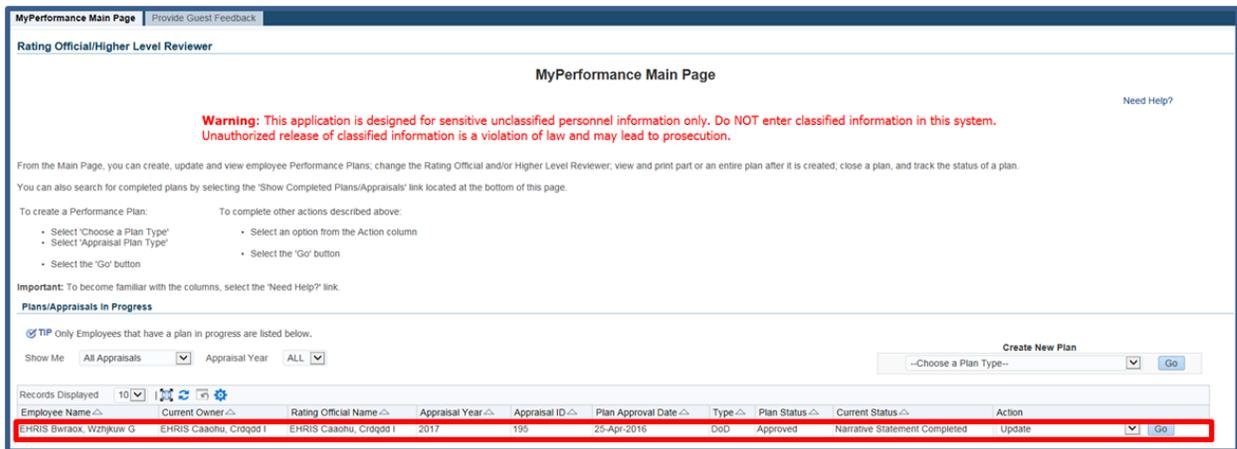


Figure 36 - MyPerformance Main Page>Narrative Statement Completed